

Manager Procedures Guide



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Part

Manager Procedures Introduction

Part 1 Manager Procedures Introduction



This guide will take you step-by-step through the most important and necessary manager procedures you need to know.

Part

Opening Procedures

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Part 2 Opening Procedures

- 1. Turn on the Server Station first by pressing the power button on the front of the computer.
- 2. Clock yourself in.
- 3. Turn on all the other stations in the establishment.

After the Z at the end of your business day, the system sets the new operation date for the next day automatically.

There is a warning screen in SoftTouch and you should always pay attention to the displayed warnings. For instance, we let you know when the last automatic external backup was successfully completed. The owner or manager is responsible to make sure their system is backed up on a daily basis in case of a hardware failure.

Note: If you do not backup the system or do not use the data redundancy, there can be no restoration of all your system settings, floor plans and data.

	N/A	Op Date: 02/11/05	Usei
り Warn	ing's		
* Last extern	al media backup v	was on 2/10/2005 12:38:20	AM
* NO LOCAL B	ACKUP EXISTS		

Part

Closing Procedures

6

Part 3 Closing Procedures

Closing procedure is called the Z.

- If the system has any open checks you need to either close or void them, otherwise all open checks will be moved into the next day's sales. Read <u>Key Manager Procedures/Open Checks/System Open Checks</u>.
- If the system has any open tips you need to put them in otherwise all open tips will be cleared on Z. Read Key Manager Procedures/Open Checks/Clear Open Tips.
- Proceed to Z. Read Closing Procedures/Z.

3.1 Shutting Down Stations

Shutdown Stations

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the General Functions header or icon.
- 3. Press the Shutdown Stations button.
- 4. Choose either **ShutDown** or **Terminate** button.

Shutdown button will shutdown all stations from the the master terminal without you having to go physically to each station to turn off the computer.

Terminate button is to terminate all the stations. This will exit all stations out of the SoftTouch System into your Windows Operating System. This will not turn off the computers.

Caution: Executing this function will disrupt your ability to have SoftTouch running on the other stations.

3.2 Z

The system can be congifured in the Backoffice to automatically Z out at the specified days and times. But if you don't have it set up to Z automatically then you need to Z Manually at the end of the business day.

Note 1: All the clocked in employees will be automatically clocked out on Z (unless it is a 24 hour establishment).

Note 2: If there are open tips in the system (a check was closed to a credit card and a server did not enter their tips), all open tips will be cleared on Z (unless it is a 24 hour establishment).

Note 3: If there are open checks in the system, either close them or void them otherwise the system will move all open checks into the next day's sales.

Z Manually

1. Press the **Manager** icon at the top of the screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	'5		0									

2. Press the **Z Out** icon on the bottom of the screen.

SoftTou 6/07 06:35p	Calc Cassandra	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
2	General Functi Set Op date, change e	ons employee, lau	nch backoffi	ce, systen	n reset		Alert System	S I alert mana	igement			
	Reports Print reports					•	Web/ Internet	Internet web brows	er			
9	All Checks Ove Find, reopen, reprint, a	e rview adjust paymen	ts, offline, vo	oids		S	Tip P Tip poo	ools ol close out				
«	Journal Daily transactional jou	ımal				9	Time Time cl	Editor ock editor,	tip fund edite	or & clocke	d in employ	/ees
-	Banks (Tills/Po Paid IN/OUT, refunds,	ckets) \$ transfers, di	iver banks a	and baland	ces	*	Empl Employ	oyee M vee Shifts, C	anagem Open Time C	ent Jocks		
*	Bank & Employ Employees and bank	/ee Close s awaiting clos	out se out				Z Out Z out sy	t /stem wizar	d			
	Charge Tip Ver Verify employee decle	ification ared credit ca	rd tips									
•	Customers & L Customers and loyalty	oyalty / maintenance										
	Accounts House accounts, gift c	ard and card	account mar	nagement								
C C C												

9

The following screen will appear:

SoftTouch POS		
6/09 05:50p Cassandra	a	
Z Wizard Z Status		
- Overview	2 7 Oversiow	
Confirmation	2 Overview	
		End of day closeout
	You have 5 open check(s)	Go to
	Vou have 1 future open check(s)	Go to
		00 10
	A You have 2 men health?	0-1-
		60 10
	You have 2 bank(s) with a balance	Go to
	You have 5 employee(s) clocked in	Go to
	You have some items that you may want to resolve before moving on with your end of day closeout pro	cedure.
	if not the system will automatically handle those items for you if you continue.	,ceaan ey
0	Continue 7 Alert Shutdown Refresh	
Cance Cance	el Process Shutdown Stations Overview	
2-2		

10

- 3. When you are ready to Z press the **Continue Z Process** button at the bottom of the screen.
- 4. If you are sure you want to start the Z for the current operation date, press **YES**.
- 5. Yellow notification box pops up in the upper left corner saying that the Z in progress. You are not forced to sit and wait until the Z is completed. You can keep using the system while it is Z'ing.
- 6. When the Z is finished, a yellow notification will pop up in the upper left corner saying that the Z process has completed successfully and thr Z report will print automatically. Press on that notification box to make it go away.

Part

Key Manager Procedures

Part 4 Key Manager Procedures

4.1 Open Price

Management function. Open Price allows a Manager to override the price of an item or a modifier.

1. Select an item or a modifier on the check.

	#108 Guest: 2	Soat 1	Nost Seat
	Scat #1	\$27	.70
	Food	\$27	.70
1	Cuke	\$1	.75 NEW
1	lce Tea	\$1	.25 NEW
1	Personal 10"	\$8	.50 NEW
	Bacon	\$1	.00
	Tomato	Ş1	.00
1	Meat Dall Sub	\$5	.25 неш
1	Cannuli	<u>\$4</u>	.95 NEW
1	Cheese Cake	\$4	.50 NFI

- 2. Press the **Open Price** button.
- 3. Enter the new price and press **ENTER**.

4.2 Item Adjust

SoftTouch System can Item Comp (give away free) any item or have certain discounts/coupons for certain items. Any special discounts for the items must be set up in the Backoffice.

Item Adjust

1. On the check touch an item that you want to adjust.

	#89 - Guest: 2	Seat 1	Nest Seat
	Seat #1	\$19	.50
	Beer	\$6.	.50
1	Amstel Light	\$3.	.50 NEL
1	Ice House	\$3.	.00 NEL
	Food	\$13.	.00
1	Steak Deluxe Sub	\$5.	.25 NEL
1	Steak Onion Cz Sub	\$5.	25 NEL
1	Side Meatballs	\$2.	.50 NEL

- 2. Press the Item Adjust button.
- 3. **Item Comp** button will appear at the bottom of the screen along with any other discounts or specials exist for that item.
- 4. Press the Item Comp button or a specific discount button.

If you are not a Manager the System may ask for an Override ID. The Item Comp or discount will be shown in red on the check under the item being comped or discounted and check's total will be automatically calculated according to the adjustment.



4.3 Item Void

Allows Manager to void a mistaken item that was sent to the remote printer. **Item Void** button is used when the mistake was made, but no item was cooked or poured. **Note:** You can do Item Void only after the order has already been sent.

- 1. Bring up the check.
- 2. On the check select an item to be voided.
- 3. Press the Item Void button at the bottom of the screen.
- 4. Choose the void reason from the list.

Void Reason List	
Reason	^
Customer changed mind	
Didn't like food	
Food prepared wrong	
Food was cold	
Other	
Dut of item	
	~
	11

5. This item is now voided.



4.4 Item Waste

Allows Manager to void an item that was already cooked or poured. **Note:** You can do Item Waste only after the order has already been sent. 15

- 1. Bring up the check.
- 2. On the check select an item to be wasted.
- 3. Touch the **Item Waste** button at the bottom of the screen.
- 4. Choose the reason for waste from the list.

Void Reason List	
Reason	
Customer changed mind	
Didn't like food	<u></u>
Food prepared wrong	
Food was cold	
Other	
Out of item	

5. This item is now wasted.

4.5 Void Order

Allows Manager to void a mistaken order that was sent to the remote printer. **Void Order** button is used when the mistake was made, but no order was cooked or poured. **Note:** You can Void Order only after the order has been sent.

- 1. Bring up the check.
- 2. Press the Void Order button at the bottom of the screen.
- 3. Choose the void reason from the list.

Void Reason List	
Reason	^
Customer changed mind	
Didn't like food	
Food prepared wrong	
Food was cold	
Other	
Out of item	
	~

4. The entire check is now voided.



4.6 Void Waste

Allows Manager to void an order that was already cooked or poured. **Note:** You can do Void Waste only after the order has been sent.

- 1. Bring up the check.
- 2. Press the **Void Waste** button.
- 3. Choose the reason for waste from the list.

Void Reason L	ist
Reason	7 8
Customer changed mind	
Didn't like food	1
Food prepared wrong	
Food was cold	6
Other	
Out of item	<u></u> हा

4. The entire check is now wasted.

4.7 Check Adjust

Check Adjust holds all of the discounts and coupons available for the restaurant that can be applied to a check. You will not see Item Adjustments when you access Check Adjust. Check Adjust refer to discounts and coupons affect the entire check. You can discount the entire check, just one Super Department (you want to discount Food but not Liquor) or for just the items assigned to one seat when seat numbers are used.

(The Check Adjust function can be secured so only certain employees can use it).

Apply Adjustment to a Check

- 1. Bring up the check.
- 2. Press the Check Adjust button at the bottom of the screen.
- 3. Press the type of adjustment button that you want to give to a customer.
- 4. Select an adjustment reason (if available) in the window that shows up.
- 5. This adjustment will now show up in red at the very end of the check and check's total will be automatically calculated according to the adjustment.



4.8 Super Adjust

You can discount items by Super Department (example: Food, Liquor). Super Adjust affects only the selected super department's items and not the entire check.

Apply Adjustment to a Super Department

- 1. Bring up the check.
- 2. Touch a Super Department that you want to adjust on the check. (Liquor for example)

	#94 - Guest: 2	Seat 1	Nest Seat
_	Seat #1	\$19	.50
	Liquor	\$9	.00
1	Alabama Slammer	\$4	.50 NEW
1	Frz Pina Colada	\$4	.50 NEW
	Food	\$10	.50
1	Eggplant Sub	\$5	.25 NEW
1	Steak Deluxe Sub	\$5	.25 NEW

- 3. Press the **Super Adjust** button at the bottom of the screen.
- 4. Any available discounts will be listed at the bottom of the screen. Select the type of adjustment.
- 5. Select an adjustment reason (if available) in the window that shows up.
- 6. This adjustment will now show up in red on the check under the super department being adjusted and check's total will be automatically calculated according to the adjustment

4.9 Seat Adjust

You can do Seat Adjustments just like you can do Super Department adjustments or Item adjustments. Seat Adjust affects only the selected Seat # and not the entire check.

Apply Adjustment to a Seat

- 1. Bring up the check.
- 2. On the check select a Seat # that you want to adjust.

1	#97 - Guest: 2	Seat 2	Ne	est
	Seat #1	\$21	.75	
	Food	\$21	.75	
1	lce Tea	\$1	.25	NEW
1	AP-Fried Mozzerella	\$4	.50	NEW
1	Filet Mignon Medium Rare	\$12	.50	NEW
	Pasta Fagiole	\$3	.50	NEW
	Seat #2	\$9	.75	
	Food	\$9	.75	
1	Coffee	\$1	.25	NEW
1	Ceasar	\$5	.00	NEW
1	Soup of the Day	\$3	.50	NEW

- 3. Press the Seat Adjust button at the bottom of the screen.
- 4. Any available discounts will be listed at the bottom of the screen. Select the type of adjustment.
- 5. Select an adjustment reason (if available) in the window that shows up.
- 6. This adjustment will now show up in red on the check under the Seat # being adjusted and check's total will be automatically calculated according to the adjustment

2	4
4	

	#97 - Guest: 2	Seat 2	Ne	est
	Seat #1	\$21	.75	
	Food	\$21.	.75	
1	lce Tea	\$1.	.25	NE
1	AP-Fried Mozzerella	\$4.	.50	NE
1	Filet Mignon Medium Rare	\$12.	.50	NE
	Pasta Fagiole	\$3.	50	NE
	Seat #2	\$8.	.78	
	10% Discount	(\$0.9	97)	
	Food	\$8.	.78	
1	Coffee	\$1.	.25	NE
1	Ceasar	\$5.	.00	NE
1	Soup of the Day	\$3.	50	NE

4.10 Check Date/Time

You can take the check's time forward or backwards. This allows other menus and their prices be used when the Schedule of those menus is out of range.

NOTE: This isn't the same as changing menus, as you may have already thought. And we will prove it below.

For Example: it's lunch time and customer wants to order a breakfast item. Sure, you could simply switch to breakfast menu, but by doing so you won't get the breakfast price for that item. Or you might even have that breakfast item on your lunch menu, but most likely, that item won't have the breakfast price.

So to take an ordered breakfast item at a breakfast price during lunch time you need to change check's time.

- 1. Start a new check.
- 2. Before you ring up any items press the **Check DateTime** button.
- 3. Enter the time for the schedule of the menu you want to access.
- 4. If needed, switch to a desired menu by pressing the **Change Menu** button and selecting a menu from the list.
- 5. Ring up items as you normally would.

4.11 Change Menu

When needed, you can switch between existing menus. This allows other menus be used when the Schedule of those menus is over or have not yet begun.

For Example: one can switch to Lunch menu even after Lunch menu is over.

NOTE: You can't change menu once you've start ringing up items. You have to either start a new check or simply clear the check you've already started by pressing the **Clear Order** button at the bottom of the screen.

- 1. Start a new check or clear the current check you have open.
- 2. Press the **Change Menu** button.
- 3. From the list select the desired menu you want to change to by touching it.
- 4. Ring up items as you normally would.

4.12 Change Server

Allows you to transfer the check to a different Server.

- 1. Bring up the check by pressing on the table the customers are seated at.
- 2. Press the **Change Server** button.
- 3. You will see a list of all available employees. Select the employee you wish to transfer this check to from the list.

		Employee List	
Employ	yee List		
Sandy	Server	6/8/2011 9:44:10 AM	<u>^</u>
Bart	Bartender	6/8/2011 9:44:18 AM	
Cassi	Eubank	6/8/2011 11:15:53 AM	E
Carrie	Cashier	6/8/2011 3:08:30 PM	
Blade	Bartender	6/8/2011 9:06:26 PM	
•			
		Cancel	ۍ 🗲

Note: You may need Manager's override if the original Server does not have the permission set to move check to another Server in the Security settings of the BackOffice.

PLEASE BE AWARE THAT THE SERVER THAT THE CHECK IS BEING TRANSFERRED TO MUST ACCEPT RESPONSIBILITY FOR THAT CHECK. THEY DO THIS BY GOING IN SOFTTOUCH TO *EMPLOYEE*, SELECT *MY CHECKS, OPEN TIPS & TRANSFERS* AND ACCESS THE *CHECKS AWAITING TRANSFER* TAB TO COMPLETE THE TRANSACTION.

4.13 Change Gratuity

SoftTouch system has the ability to add an automatic gratuity based on guest count. You will use **Change Gratuity** if this gratuity ever needs to be adjusted, should you wish to add a gratuity when auto gratuity is not set up or when you have not met the minimum guest count required to activate the auto gratuity as designated in your set up.

- 1. Bring up the check by pressing on the table the customers are seated at.
- 2. Press the **Change Gratuity** button.
- 3. At the prompt, specify whether gratuity will be a percentage or an amount.
- 4. Enter the new gratuity percentage or amount and press **ENTER**.

4.14 Print Server Report

Attention:

- a. If your servers bank themselves, then in the BackOffice under General section->Order Functions->Bar/Dining tab make sure the Auto Tip Deduction option is selected. This way the server report will be able to deduct their charge tips from the cash sales, giving you a Cash Due total for that the server . You won't have to do Tips Paid Out anymore, the servers will subtract the charge tips from their cash sales and give you a Cash Owed total so they can just turn in credit card slips and the amount indicated on their report.
- b. If your servers are under a cashier system (when all checks are being closed by a cashier) then the servers do not bank themselves. DO NOT check the Auto Tip Deduction option in the BackOffice. You will need to look for Open Checks amount and Charge Tips amount on the report and pay out tips from a station with a drawer. (<u>Read Pay Out Tips section</u>)

Print Server Report

- 1. Press the **Employee** icon in the top right area of the screen.
- 2. If you are a manager taking a report on behalf of a server, use the **Change Employee** button to change to the employee for which you need to print the server report.
- 3. Press the Server Report button at the bottom of the screen.
- 4. The system will ask you to select report print size of 40 or 80 column format.

If you choose the 40 column format, the report will be printed on the receipt printer. If you chose the 80 column format, the report will be printed on the regular office printer.

- 5. Press the **Print** button at the bottom of the screen.
- 6. Look at the bottom of the report for any open checks that server has.

4.15 Pay Out Tips - Cashier System Only

Look at each server report (read <u>Key Manager Procedures/Print Server Report</u>) for any Charge Tips you need to pay out.

Pay Out Tips (for Cashiering systems only)

From the workstation you are removing the money from to pay the employee's tips:

- 1. Press the **Manager** icon at the top of your screen.
- 2. Press the Banks (Tills & Pockets) Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.
- 3. Highlight the till you are deducting the money to pay the tips from and press the Paid Out button.
- 4. Choose the reason code. In this case Paid Out Tips Paid

	Cash Paid	
Cash I	Deid List	
Cash	Paid List	
Paid UUT	Driver Paid	Î
Paid OUT	Driver Tips Paid	
Paid OUT	Paid Out	E.
Paid OUT	Tips Paid	
	Cancel	× 🦿

- 5. Enter amount of server's charge tips.
- 6. Give money to the server and have them sign a slip for it.
- 7. Do the same for other servers.

4.16 Paid In

The Paid In function allows you to pay money into the till (on any terminal with a till) or store safe, without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In Procedure

From the workstation you are putting the money into:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispa	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	's	1.E. 1	-	11.1								

2. Press the Banks (Tills & Pockets) Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

ee, launch backoffi	Ce, system re								
ee, launch backoffi	ce, system re				20				
		eset	-	System	alert mana	gement			
			•	Web/I	nternet web brows	er			
/ ayments, offline, vo	pids			Tip Po Tip poo	ools I close out				
			9	Time Time clo	Editor ock editor, t	ip fund editc	r & clocked in	employees	
5) iers, driver banks (and balances	3	*	Employ	oyee Ma ee Shifts, O	anagem pen Time C	ent locks		
lose out ng close out			2	Z Out Z out sys	stem wizaro	1			
ion edit card tips									
y nance									
82 7/2	nagement								
y n	, ance card account ma	ance card account management	ance card account management	ance card account management	ance card account management	ance	ance card account management	ance card account management	ance card account management

29

- 3. Highlight the till you are adding the money to and press the **Paid In** button.
- 4. You will be prompted to choose the payment type.

Payment Type List Cash Visa Mastercard Mex Discover Diners/ Carte Bl		Payment Types	
Cash Visa Mastercard Amex Discover Diners/ Carte Bl	Ray Pay	nent Type List	
Visa Mastercard Amex Discover Diners/ Carte Bl	cash	Cash	
Mastercard Mese Discover Diners/ Carte Bl	VISA	Visa	
Amex Discover Diners/ Carte Bl		Mastercard	
Discover Diners/ Carte Bl	ANTERIO DE CARACTERIO DE C	Amex	
Diners/ Carte Bl	AND	Discover	
	<u>.</u>	Diners/ Carte Bl	
Cancel		Cancel	9

- 5. Enter the amount of a Paid In.
- 6. Press Yes to the confirmation dialog.

Confir	mation Dialog	
Paid F	IN: \$50.00 Fill #1 Paid in	?
Yes	No	
4.17 Paid Out

The Paid Out function allows you to pay money out of the till (on any terminal with a till) or store safe, without deducting from sales. The system will ask you for reason codes and you can print a report with the reasons.

Paid Out is used when you need to remove money from a till or store safe to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From the workstation you are taking the money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the Banks (Tills & Pockets) Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

SoftTour	h POS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
6/07 06:35p	Cassandra					7			Ø	22			
Ž	General F Set Op date, c	unction	15 ployee, laur	nch backoffi	ce, system	n reset		Alert System	s alert mana	igement			
	Reports Print reports						•	Web/	Internet web brows	t er			
9	All Check Find, reopen, r	s Overv reprint adju	r iew ust payment	ts, offline, vo	iids		S	Tip P Tip poo	ools ol close out				
«	Journal Daily transacti	ional journe	al				9	Time Time cl	Editor ock editor,	tip fund edito	or & clocked	l in employe	es
	Banks (Ti Paid IN/OUT,	IIS/Pock refunds, \$ t	(ets) ransfers, dri	iver banks a	and balanc	ces	*	Empl Employ	oyee M vee Shifts, C	anagem Open Time C	ent Jocks		
8 <u>8</u>	Bank & El Employees ar	mploye nd banks a	e Close waiting clos	out e out			2	Z Out Z out sy	t /stem wizar	d			
	Charge Ti Verify employ	i p Verifi ee declare	i cation d credit car	d tips									
•	Customers and	r s & Loy d loyalty m	alty aintenance										
d	Accounts House accour	nts, gift carc	d and card a	account mar	nagement								
0													

32

- 3. Highlight the till you are taking the money from and press the **Paid Out** button.
- 4. Select the reason money is being removed from the till or store safe.

		Cash Paid	
Cash	Paid List		
Paid OUT	Driver Paid		ŕ
Paid OUT	Driver Tips Paid		
Paid OUT	Paid Out		E
Paid OUT	Tips Paid		
		Cancel	∱ €

- 5. Enter the amount of the Paid Out.
- 6. Press Yes to the confirmation dialog.



4.18 Reset Employee Timecards

If you pay your employees irregularly and not on the regular payroll date, you should reset their timecards right after you pay them. (This can be used for contract employees.) This way their time on the payroll report will be reset and start tracking from zero.

****Screen Shots when I figure out how to get the crop tool to work again!**

Reset Employee Timecards

The employee must be clocked out before you can reset timecards.

1. Press the **Manager** icon on the top of the screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispa	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	's	1. E. S	-	1.1								

2. Press the **Time Editor** icon on the right side of the screen.

50ftTour 5/13 05:31p	ch POS Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	<
Č۲	General Fi Set Op date, ch	unction ange em	15 ployee, laur	nch backo	ffice, system	n reset	-	Alert System	S n alert mana	gement				
	Reports Print reports						•	Web/ Internet	Internet web brows	er				
9	All Checks Find, reopen, re	overv eprint adji	r iew ust payment	ts, offline, \	/oids		1 Alexandre	Tip P Tip poo	ools ol close out					
«	Journal Daily transactio	onal journe	al				2	Time Time cl	Editor lock editor, 1	ip fund edit	tor & clocke	ed in employ	ees	
	Banks (Til Paid IN/OUT, re	IS/Poci efunds, \$1	kets) transfers, dri	iver banks	and balanc	ces	*	Empl Employ	loyee Ma /ee Shifts, C	anagem pen Time	ent Clocks			
<u>88</u>	Bank & En Employees and	n ploye d banks a	e Close waiting clos	out se out			Z	Z Out Z out sy	t /stem wizard	ł				
ece?	Charge Tip Verify employe	v Verifi e declare	i cation ed credit car	d tips										
•	Customers and	s & Loy Hoyalty m	/alty aintenance											
	Accounts House account	ts, gift card	d and card a	account ma	anagement									

35

- 3. Press the **Select Employee** button at the bottom of the screen.
- 4. Highlight the employee that timecards are being reset for.

12.2.2.

5. From the calendar that displays, select the weekly start date for this employee and press enter.

Today	6_/12/:	2011	BK ←	Clear	Select weekly start date	
Now	12:00AN	4	ВК	Clear	June, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 29 30 31 1 2 3	Sat 4
15 min	2 Days	4	5	6	5 6 7 8 9 10	11
30 min	3 Days	1	2	3	19 20 21 22 23 24	25
45 min	4 Days	0	AM	PM	26 27 28 29 30 1 3 4 5 6 7 8	2 9
60 min	5 Days	CANCE	3. E	INTER	Today: 6/13/2011	

- 6. Press the **Reset Timecards** button.
- 7. Press **YES** to the confirmation dialog.
- 8. The timecards of this employee are now reset to zero.

Part

BackOffice Manager Procedures

Part 5 BackOffice Manager Procedures

To Enter BackOffice

- 1. When in SoftTouch, press the **Manager** icon at the top of the screen.
- 2. Press the **General Functions** icon on the left of the screen.
- 3. Press the **Launch BackOffice** button at the bottom of the screen.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

4. Enter your User ID and Password and press the Login button.

SoftTouch Ba	ckOffice
Login Info	rmation
9	Welcome to SoftTouch, please enter your username and password and press OK or use Firenter your login usename Press finger on device for 1 secon
User ID	
Password	
	Login <u>C</u> ancel
Registered	d to: SoftTouch, LLC
User a Licens	grees to terms and conditions of the Customer e Agreement.
<u>View Cust</u>	omer License Agreement

5.1 Credit Card Batch

The system automatically processes the daily credit card batch when you perform a daily "Z". However, if you wish to view, print and match your receipts before they are processed, proceed with the following steps:

- 1. After all servers have settled their credit card tips open the Backoffice.
- 2. Under Financial section click on Credit Card.
- 3. Click on the DialUp-Batch Transactions/Administrator tab.
- 4. The system will warn you if there are any open tips to be settled. If there are still open tips, go to and settle them, then come back here to proceed.
- 5. The system will warn you that a "Z" has not been performed as well; this is normal.
- 6. Click View, Batch Report View. This will display all credit card transactions for the batch that is selected. Today's batch will be labeled Open Batch; choose this batch if it isn't already selected. If you require a hard copy to do your balancing, click on the Printer icon, select Report printer, then select Print. Balance your credit card receipts to this report.
- 7. Now close this screen and proceed to normal "Z" out.

5.2 Menu Items

5.2.1 Change Menu Item Name

Under the General applet, click on Item Builder.



1. Click on the red button labeled Items and all Item Groups are displayed.



2. Click on the + sign next to the Item Group to expand it and reveal the Items it holds.



3. Select the Item you wish to rename.

Cern Bunder AF Theas	salaman Isoona Juo s	
Departments Menu & Hule Builder	Smart Rules Menu Ca	itegoi
🗕 🐥 🏭 🏣 🖿 💌	🦻 📕 🐰 🖻 🖺	
Modifiers Items Li	nks Main Menus	
Builder		
Item		-
🖃 🌐 Item Builder		
🗄 🖞 Pizza		
• Burgers		
E Salads		
- Appetizers		
AP-Fried Calamari		
🕀 💷 AP-Clams Casino		
🗄 💷 Ap-Clams Oregano		
🗄 💷 Ap-Mussels Marinai	ra	
🗄 💷 AP-Shirmp Cocktail		
🕀 🍘 AP-Fried Mozzerella	à	
🗄 💼 AP-Mozz Caprese		
E Soups		
+ Pasta		
🛨 🖬 Steaks		
🕀 🚾 Chicken and Veal		
🕀 🚾 Seafood		
Wings		

4. Once the Item is selected, on the right side you will see its properties. (You will be on the Item tab, look at the very bottom). In the provided fields enter the new Item Name, Print Name (how you want this item name to print on kitchen's remote ticket) and Receipt Name (how you want this item name to print on customer's receipt). Change the Button Text accordingly.

P-Fried Calama	ri AP-Fri	ed
Internal imag	e 🗌 🥅 Hide Button 👘 Calam	ari
Custom imag	e	
Clear button ir	age	
em properti	5	
Item #	0856 🔽 Active	
Item Name	P-Fried Calamari	
Print Name	P-Fried Calamari	
Receipt		
Family 🛛	vppetizers 🗾	
Priority [_	
arcode/PLU		
nable Scale	-	
7 Roll Modifie	s\$ 🗖 86 ⊽ Allow Refills y 🔽 Non Taxable	(Kiosk)
🐔 Do not print	on check/receipt if \$0	
Page Break lode Display	Non Priced Modifiers 0	
All Modes		

5. To update the stations with the changes you just made click the Update Stations icon (blue push pin) at the top right of the toolbar.

Departments	Menu & Rule Builder	Smart Rules	Menu Categories I Item Maintenance	~
- + 🛛	i 🔚 🔚 📟 🕅	🖻 🔲 🕷	‰ ि 🕼 🔢 😈 剩 ફ∔ 🛹 🐖 🖉 i× 🕼 🖬 🖬 🗜 ± ザ 🛄 🕞 🖺 ∞० 🕬	2

6. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

5.2.2 Change Menu Item Price

Under the **General** applet, click on **Item Builder**.



1. Click on the red button labeled Items and all Item Groups are displayed.



2. Click on the + sign next to the Item Group to expand it and reveal the Items it holds.



3. Select the Item whose price you wish to change.

[tem Builde <mark>r</mark> - /	AP-Fried Cala	mari
Departments Menu 8	x Rule Builder Sma	rt Rules Menu Categori
- + 🏦 🖢 🕯	= = ()	📕 X 🖻 🛅 E
Modifiers Ite	ems Links	Main Menus
Builder		
Item		
🖃 🌐 Item Builder		
🛨 🔚 Pizza		
🕀 🗖 Burgers		
🕀 📻 Salads		
- Appetizers	5	
🕀 🧰 AP-Frie	d Calamari	
🕀 🧰 AP-Clan	ns Casino	
🕀 🐻 Ap-Clan	ns Oregano	
🕀 💼 Ap-Mus	sels Marinara	
🕀 🧰 AP-Shir	mp Cocktail	
🕀 🗰 AP-Frie	d Mozzerella	
+ AP-Moz	z Caprese	
F. Soups		
+ Pasta		
E Steaks		
E Chicken ar	nd ¥eal	
E Seafood		
H Wings		

4. While the item is selected, click the **Pricing** tab at the bottom of the screen on the right.

otive	Amount	Priority	Schedule	
•	\$5.0	0	1 Pool Table Night	
	\$6.0	0	All Day Schedule	
ice del	tails			+ Add - Delete
ice del	t ails Amount	\$5	5.00	+ Add - Delete
ice del	Amount	\$5 per Ibłoz I	5.00 for scales	+ Add - Delete
ice del	Amount Schedule	\$5 per Ibłoz Pool Tabl	0.00 for scales le Night	+ Add - Delete -∕ S
ice del O	Amount Amount Schedule	\$5 per Ibłoz Pool Tabl	5.00 for scales le Night v	+ Add - Delete ∽ S
ice del O	t ails Amount Schedule rder Type Priority	\$5 per Ib/oz f Pool Tabl	5.00 for scales le Night -	+ Add - Delete - 9
ice del	tails Amount Schedule rder Type Priority	\$5 per Ibłoz I Pool Tabl	5.00 for scales le Night v	+ Add → Delete ~ 9
ice del O	tails Amount Schedule rder Type Priority	\$5 Peol Tabl	5.00 for scales le Night v	+ Add - Delete - 9
ice del 0)ptions	tails Amount Schedule rder Type Priority	\$5 per Ibłoz I Pool Tabl	5.00 for scales le Night v V Open Price	+ Add → Delete ~ 9
ice del 0)ptions I Ac I Do	tails Amount Schedule rder Type Priority ctive	\$5 per Ibłoz I Pool Tabl	5.00 for scales le Night	+ Add - Delete - 9

Menu items can have more than one price. Food may stay at one price all day, while liquor may change from regular to happy hour pricing.

On the right side of the screen under **Item Pricing List** you will see a list of all prices assigned to a currently selected item.

Item pricing list				
Active Amount	Priority Schedule			
✓ \$5.	00 1 Pool Table N	Night		
\$6.	00 All Day Sche	edule		
ice details			+ Adc	
Amount	\$5.00			
	per Ibłoz for scales			
Schedule	Pool Table Night	•		
Order Type	•			
Order Type Priority]⊉			
Order Type Priority Options				
Order Type Priority Options	↓ ↓ ↓			
Order Type Priority Options Z Active	T ♣ T ♣ I ♥ Open Price	e Intable		
Order Type Priority Options Active Opfault Price	↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	e Intable		

Right below the Item Pricing List is the **Price Details** section, which shows you the price and the schedule during which this price is active.

Image: Style styl	-	Active	Amount	Priority	Schedule		
rice details + Ada Amount \$5.00 per Ib/oz for scales Schedule Pool Table Night Order Type Priority 1		~	\$5.00)	1 Pool Table Night		
Price details Amount \$5.00 per Ib/oz for scales Schedule Pool Table Night Order Type Priority 1 €		\checkmark	\$6.00)	All Day Schedule		
Price details + Add Amount \$5.00 per Ib/oz for scales Schedule Pool Table Night Order Type Priority 1							
Schedule Pool Table Night	Pi	rice de	tails Amount P	\$! er Ibłoz	.00 for scales	-	+ Add
		C	Schedule F)rder Type Priority	Pool Tab	e Night	•	
		V A	.ctive		 Upen Price 		
Active Upen Price		and the second			- N. (D.) (1.1		

- 5. Under **Item Pricing List** select the price you wish to change.
- 6. Under **Price Details** in the Amount field enter the new price and assign the correct schedule for the price.
- 7. Click the ✓ Save button located at the top of Price Details section.
- 8. For make more price changes repeat steps 3 through 7. Note that you can skip step 4 since you will already be on the Pricing tab when you get to the next menu item.

9. To update the stations with the changes you just made click the Update Stations icon (blue push pin) on the toolbar.

Departments Menu & Rule Builder	Smart Rules Menu Categories 1	Item Maintenance	-
- + 🛗 🏣 🏣 🚥 🖂	🖻 🛃 🐰 🖻 🖺 iu	ʲ 🛋 ≜↓ 🖇 🕷 🖉 i× 📴 🖬 🖪 🗣 古 🖤 🛄 🖻 🖾 ፡፡፡ ፣፡∢	

10. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

5.2.3 Add New Menu Item

Under the General applet, click on Item Builder.



Add Menu Item

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



2. Highlight the group you wish to add an item to by clicking on it. Then click the Add Item icon (small red i). See image:



3. A small window will pop up asking to enter an Item name you are adding. Enter the name of the item

and press Ok.

4. You will be asked if you want to continue adding. If you were adding only one item, click No. If you are adding more than one item, click Yes and repeat step 3.

Assign a Family Group to a Menu Item

- 5. Highlight the first Menu Item you've added clicking the + to the left of the Item Group you added this item to, then clicking on the newly added Menu Item. Item Properties fields will be displayed on the right side.
- 6. Click the Family drop-down menu. A list of Family Groups will show up. Select the Family Group that this Menu Item will belong to.

icem propert	les		
Item #	15632 🔽 🔽 Act	ive	
Item Name	AP-Bruschetta		
Print Name	AP-Bruschetta		
Receipt			
Family		-	_
Priority	Family name		*
Barcode/PLU	Appetizers Beer		
Enable Scale	Beer Beverages		
🔽 Roll Modifie	Bourbon		
🔽 Upsell Disp	Brandy		
🔽 Do not prin	Cocktails Cue Stick Sales		-
🗖 Page Brea	Non Priced Modifie	ers 0 🗢	
		····] <u>····</u>	
Node Display			
All Modes			

Specify Price and Schedule for a Menu Item

7. Now click the Pricing tab at the bottom of the screen.

1	Active	Amount	Priority	Schedule	
•	~	\$5.0	0 1	Pool Table Night	
	~	\$6.0	0	All Day Schedule	
Pr	ice de	tails			+ Add - Delete 🗠 Sa
		Amount	\$5.	00	
		, i	per Ibłoz f	or scales	
		Schedule	Pool Table	Night 🚽	
	C) Ider Type			
		Priority	1 🛋		
		. 1	<u> </u>		
	Options	ġ			
- (ctive	5	7 Open Price	
- (V A	Caro			
- (A 되 고 되	efault Price	I	7 Not Discountable	

- 8. Enter the price of this Menu Item in the Amount field.
- 9. Click the Schedule drop-down menu. A list of all predefined Schedules will show up. Select the Schedule for this price.

Price details			🕈 Add	- Delete	113
Amount	\$9.95				
	per Ibłoz for scales	6			
Schedule					
Order Type	Name	<u> </u>			
Priority	All Day Schedule Delivery Charge 1 Delivery Charge 2				
	Dollar Domestic				
Options	Pool Table Day				
Active	Price1	-			
🔽 Default Price	Not Discountable				
U Override	Lock Price				

50

- 10. If you need to have more than one price for this item (different prices at different schedules), click the
 Add button next to Price Details heading and repeat steps 8 and 9.
- 11. Click the **Printer Groups** tab at the bottom of the screen.

Modifier / Item / Pricing, Print Groups, Recipe / Tax / Adjust. / Rentals / Menu Details / Stock /

12. On the right, under **Remote Print Group Name** heading click the drop-down menu. A list of predefined printer groups will show up. Select the printer group this item will be sent to. (If this item is

to go to more than just one printer, click the + Add button next to **Remote Print Group Name** heading and repeat step 12).

Remote Print groups	
Remote Print Group Name	
Name	
Bar	
Check1	
Check2	
Check3	
Check4	
Cold	
Delivery Printer	
Expeditor 🔹	
Modifier (Item (Pricing) Print Groups (Recipe (Tax (Adjust. (

13. Now click the Tax tab at the bottom of the screen.

1	Modifier /	ltem/	(Pricing)	(Print Groups /	Recip	Tax/	/ djust. /	Rentals /	Menu Details /	Stock /	-
	<u> </u>			<u> </u>		and the second s	the second second	<u> </u>	<u> </u>		

14. On the right, under **Tax Tables** heading click the drop-down menu. A list of predefined in your system tax tables will show up. Select the tax table that will be added to this item.

Tax tables	+ Add 🗂 Delete 🦿 Save
Tax Table	
Tax Table1 Tax 2	
\Modifier { Item { Pricing { Print Groups { Recipe), Tax (Adjust, / Rentals / Menu Details / Stock /

15. To complete set up of other menu items you might have added, repeat steps 5 through 14.

Note: If you are adding a whole new item and not just modifying an already existing one, you must exit out of SoftTouch on all stations and re-launch the SoftTouch on all the stations in order for the new items to appear on all stations.

16. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

			1		X
		IM.	<	г. г	1
00	무 古 🗋	00	500	1024 💊	(•
I -Bowl	Pasta				

5.2.4 Link Modifier Group to Menu Item

Under the General applet, click on Item Builder.



1. Click on the red button labeled Items and all Item Groups are displayed.



2. Click on the + sign next to the Item Group name to expand it and reveal the Items it holds including the Item you wish to change.



3. Highlight the Item you wish to link a Modifier Group(s) to, then click the Add Modifier Group icon

(yellow block with label M). See image:

Modifiers Items Links Main Menus	Button p	roperties
Builder	Buttor	n Color
iem 📃		
🗄 🆽 Item Builder 🔪 👘		
🗄 🔚 L-Pizza, Calzones and Stromboli	Button Te	ext L-Steak
🗄 🔚 L-Sub and Soup		
E L-Appetizers	Item pro	perties
E-Beverages	lte	m # 1027
E L-Super Lunch Specials	Item Na	ame L-Steak
E L-Entrees	Realities	
Ŧ 🔳 L-Chicken Francese	Print Na	ame L-Steak
🛨 🗾 L-Lhicken Marsala	Beceint Na	ame
+ C-Shrimp & Broccoli		
E-Lunch Lombo	Fa	mily L-Lunch E
		Cost 🖉
Filet Pom Shrimn	Hold I	ime
I - Filet Pomodoro		Use Se
T Penne Yodka		
F D L- Fett Alf		
L-Steak		
H - Salads	Auto I	seturn 🔲 Pag

4. A list of all your existing Modifier Groups appears. (You can click the + sign next to Modifier Group name to view the items in that group).



- 5. Highlight the group you wish to add and click the Select button.
- 6. To link more Modifier Groups to this Menu Item repeat steps 3 through 5.
- 7. Now click on the Add Link Group icon (blue block with label L) to add your Manual Modifiers. See

-	-
Э	Э
-	-

image:	
🗕 🕂 🖀 🏣 🏹 🗠 🤌 📙 🖒 🗂 🔟 😈	🗐 🥪 🐔 🖉 ix 🛛 🖬
Modifiers Items Links Main Menus	Button properties
Builder	Button Color
Item 🔪	
🖃 🌐 Item Builder 💦 🚺	
🕀 🏣 L-Pizza, Calzones and Stromboli	Button Text L-Steak
🗄 🔚 L-Sub and Soup	
L-Appetizers Add Link Group icon	Item properties
E L-Beverages	Item # 1027
E L-Super Lunch Specials	Item Name I-Steak
- L-Entrees	
+ EL-Chicken Francese	Print Name L-Steak
🗄 🛄 L-Unicken Marsala	Receipt Name
E Similip & Broccon	
E Lunch Combo	Family L-Lunch Er
E L-Yeal Cacciatore	Cost 🗲
🗄 🔳 L-Filet Pom Chicken	Hold Time
🕀 🔳 Filet Pom Shrimp	
🕀 🔳 L- Filet Pomodoro	🔳 Use Sea
🗄 🔳 L- Penne ¥odka	Half Iten
🕀 💼 L- Fett Alf	
🕀 💼 L-Steak	
Steak Temp	

8. A list of all your existing Link Groups appears. Highlight the group named Manual Modifiers and click the Select button.



- 9. Click the + sign next to the Menu Item where you just added these groups.
- 10. Highlight the first modifier group under this item.
- 11. On the right side in the Quantity field enter how many modifiers a customer can choose. If the modifier is required to be entered before the server can move on (steak temp, egg prep, etc.) enter the quantity in the Force Quantity filed.

If you are allowed one choice, but not required to enter it (with a ham & cheese sandwich, the guest may get a choice of cheeses, but the server can press go on and not enter one of the guest asks for no cheese) enter the quantity in the Quantity field.



For Example: For the meat temperatures a customer chooses only one meat temperature, so you would put the quantity as 1 in the Force Quantity field and after the server selects the meat temp. he/she is automatically moves onto the next choice of item modifiers. If you want to display the modifier group over and over again until the server prompts the system to go on, leave a 0 value in the Quantity field. You normally do this in the case of sub modifiers where customers order multiple toppings.

- 12. Do the same for any other modifier groups you have linked to this item.
- 13. Now highlight the Manual Modifiers link group under the item you are working with.
- 14. If you have Manual Modifiers (such as "No" this and that, "Add" this and that or "Extra" this and that) added to the item, then make sure to select it first and then check the Manual Modifier option.

[tem Builder - Manual Modifiers	14 A D
Departments Menu & Rule Builder Smart Rules Menu Catego	ories Item Maintenance
- + 🖆 🥁 🖿 📼 🤌 🛃 🐰 🖻 🎦	🛐 😈 🛋 🛃 🦇 💨 🖉 i× 🐚 🖬 🖬 🗜 🗄 酇 🛄
Modifiers Items Links Main Menus	Button properties
Builder	Button Text Font Color Manual Modifiers
L-Steak	Internal image Hide Button Manual Modifiers
🕀 🖢 Soups	Clear button image
⊕ asta ■ Steaks	Group properties
En Chicken and Yeal	Force Quantity 0 I Manual Modifier
En Cold Subs	Node Display
🕀 🔤 Sides	

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IMPORTANT: Add forced modifiers groups (yellow blocks) before Manual Modifiers link group. You can change the order of modifier groups by right clicking on the group and from the menu that pops up choosing Move node up, Move node down or Move node to top, Move node to bottom or analogously using the buttons on the toolbar.



15. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to

the SoftTouch screen.

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L-Bowl Pasta	

5.2.5 Add New Modifier

Under the General applet, click on Item Builder.



1. Click on the yellow button labeled Modifiers and all Modifier Groups are displayed.



- 2. Click on the + sign next to the Modifier Group name to expand it and reveal Modifiers it holds.
- 3. Highlight the Modifier Group name where you wish to add your Modifier(s).
- 4. Then click on the Add Modifier icon (small yellow M). See image:



- 5. A small window will pop up asking to enter a Modifier name. Type in the name of the Modifier and click Ok.
- 6. If you are adding more than one modifier, click Yes when asked "Continue adding?" and repeat steps 5, otherwise click No.
- 7. Highlight the first Modifier that you added by clicking on it. Modifier Properties fields will be displayed on the right side.
- 8. Click the Family drop-down menu. A list of Family Groups will show up. Select the Family Group that this Modifier will belong to.



Specify Price and Schedule for a Modifier Item

9. Now click the Pricing tab at the bottom of the screen.

```
Modifier / Item Pricing / Print Groups / Recipe / Tax / Adjust. / Rentals / Menu Details / Stock /
```

- 10. Enter the price of this Modifier Item in the Amount field.
- 11. Click the Schedule drop-down menu. A list of all predefined Schedules will show up. Select the Schedule for this price.

Amount	\$0.25		
	per Ibłoz for scales	<u>.</u>	
Schedule	-		
Order Type	Name		
Priority	All Day Schedule Delivery Charge 1		
	Delivery Charge 2 Dollar Domestic		
	Entertainment		
ions	Pool Table Day Pool Table Night		
Active	Price1	-	
7 Default Price	Not Discountable		

- 12. If you have more than one price, click the + Add button next to **Price Details** heading and repeat steps 10 and 11.
- 13. Repeat steps 7 through 11 for additional Modifiers you might have added.

Note: When adding new modifiers and not just modifying the already existing one, you must exit out of SoftTouch on all stations and re-launch the SoftTouch on all the stations in order for the new modifiers to appear on all stations. Modifiers follow the remote printer and tax table of the menu item they are assigned to.

14. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

	N Y Y N
	800 1024 🗞 🔸
L-Bowl Pasta	

5.2.6 Change Number of Items on Display

If you make additions to your menu, you may need to change the way the items display on your screen. **For Example:** if your appetizer group has 12 items in it, the screen should be set to display 3 columns and 4 rows. This way the buttons are as large as possible while fitting all items on one page. If you add two items to this group, the system will automatically put them on page 2. Keeping all items on one page is faster and more convenient to access.

Under the General applet, click on Item Builder.

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1. Click on the Modifiers (yellow) or Items (red) button and then highlight either Modifier Group or Item group, depending on which button you selected.



 Highlight the Modifier or Item Group that you On the right, under Group Properties heading you set the number of items to be displayed on a screen by changing the values in the Rows and Columns fields.

fiers Items Links Main Menus	Button properties
r	Button Color Entrees
em Builder L-Pizza, Calzones and Stromboli L-Sub and Soup L-Appetizers L-Beverages L-Super Lunch Specials	Button Text Entrees Font Item group properties Rows 4 () Columns 4 ()
L-Entrees L-Salads L-Desserts L-Pizza L-Gourmet Pizza Calzone & Stromboli Appetizer & Sides	Page Names Lunch Entrees Page 2 Page 3 Page 4 Page 5 Page 6

3. The Page Names field below Rows and Columns are the titles that appear at the top of your menu buttons when you ring up an order to indicate what items are on what page.



5.3 Employees

5.3.1 Add Employees That Don't Ring Checks

To add an employee that doesn't ring up checks (*bus people, dishwashers, hostesses, drivers etc.*) do the following:

Under the **General** applet, click on **Employees**.



The top half of the screen on the left displays a list of employees already entered into the system.

Employee list				
Search by last name	e by first name			🗖 Hide inactive emp
First Name	Last Name	User ID	*	Current Employee Job List
Bart	Bartender	Bartender		Bartender
Blade	Bartender	Blade17	1	Manager
Busboy	Busboy	Busboy14		- 07:
Carrie	Cashier	Cashier		
Joe	Cory	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager		

The bottom half of the screen is where you add new employees.

E	. has an i								- 1	
Employee Secu	rity Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SM	5 No	tes
Employee								+/	Add	- D
Employee #	5				Left/Right hand	ed Right ha	nded	•		
First name	Bart		-		Button Si	ze Small bu	ttons	-		
Last name	Bartender				Driver Dispate	h Advance	:d 👻			
Employee Type	SoftTouch Emp	loyee	-		Assignment Mot	le i				
Social security #	[Show/Hi	de							
Birthday	ſ	-								
Employment date		-								
Group Name		180 CONT								
	🔽 Dealer Acco	unt								

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Add Employee

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the employee's first and last name and select SoftTouch Employee as the **Employee Type**.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

If you are doing delivery at this restaurant, and this employee is a Driver, select Basic for the **Driver Dispatch Assignment Mode.** This allows a driver to assign deliveries to themselves but not to another employee.

5. Click on the **Security** tab.



The screen below will appear:

Employee Security Finger Print Job & Wag	es Address Phone numbers Tills/Pockets Scheduling Tracking Al
Security	
 Active/Account Disabled Is account locked: System User ID Bartender Backoffice Change Password <u>Password expires</u> 3/30/1900 	SoftTouch Swipe id/RFID never expires Leave cashout money under original employee Concurrent user logon Show bank detail amounts Can clockout without closing out Swipe ID/RFID expires Never Change Swipe ID Change RFID

- 6. Enter the employee's name in the **System User ID** field.
- 7. Press the Change Swipe ID button, and swipe the employee's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the Job & Wages tab.

Employee	Security	Finger Prin	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	Ì
----------	----------	-------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

The following screen will appear:

Employee	Security Finge	r Print Job	& Wages 🛛 🌶	ddress	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	No
Employee	e job and wage	detail							+ Ac	bb
	🔽 Active				Pay	Гуре		-		
Job Descri	ption			-	Wage Am	ount	Sho	w/Hide		
Security G	iroup		T			🔽 Apply	tip credit			
Auto l	.ogin		•		IMPORT/	ANT NOTICE A	BOUT VEEK	LY HOURS	AND	
	🔽 Pickup	all employee	e checks		It is the s	ole responsibil hours and va	ity of the use ges calculati	er to ensure on features	e that s of	
	🔽 Assign	RFID or swip	be card on cl	ockin	this produstate and	eith				

9. Select the Employees job from the drop down selection by **Job Description**.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	---------

	🔽 Active	Pay Type H	ourly 👻			
b Description		Vage Amount	Show/Hide			
ecurity Group	Description					
	Bar Help		Apply tip credit			
Auto Login	Bartender	BTANT NOT	TICE ABOUT VEEKLY HOURS AM			
	Bus Help	SFEATURI	S FEATURES!			
	Cashier	e sole resp	onsibility of the user to ensure th and wages calculation features of			
	Dish Help	oduct are p	roperly configured to comply with			
	Driver	and federal	labor and pay wage laws.			
	Hardware					
	Hostess					

10. Select the Employees security level from the drop down selection by **Security Group**.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Ema

mployee job	and wage detail			
	Active		Pay Type Hourly	_
ob Description	Bartender	·	Wage Amount	Show/Hide
ecurity Group	1	•	Apply tip	credit
Auto Login	Administrator	•	IMPORTANT NOTICE ABO	OUT VEEKLY HOURS AND
	Asst. Manager Bartender		VAGES FEATURES! It is the sole responsibility	of the user to ensure that
	Cashier		the weekly hours and wage	s calculation features of
	Dealer	n	this product are properly constants and federal labor and	onfigured to comply with
	Drivers			pay auge land.
	Employee			
	Managers	+		

- 11. If this is an employee that does not ring checks, keep the Auto Login at None.
- 12. Select whether this Employee is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee Sec	urity Finger Print Job & Wages Addres	s Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email	
Employee job	and wage detail						
	I▼ Active	Pay T	ype Hourly		-		
Job Description	Bartender	- Wage Amo	ount Overtime	Exempt			
Security Group	Bartender 🗨		Apply tip credit				
Auto Login	None	IMPORTA VAGES EL		BOUT VEEK	LY HOURS	AND	
	🔽 Pickup all employee checks	It is the so	It is the sole responsibility of the user to ensure that the weekly hours and wages calculation features of this product are properly configured to comply with state and federal labor and pay wage laws.				
	Assign RFID or swipe card on clockin	this produ state and					

13. Enter the weekly or hourly wage this Employee is paid in the **Wage Amount** field.
| Employee Sec | urity Finger Print Job & Wages A | ddress | Phone numbers | Tills/Pockets | Scheduling | Tracking | Alerts/Ema |
|-----------------|--------------------------------------|--------|-------------------------|------------------------------------|-----------------------------|----------------------|------------|
| Employee job | and wage detail | | | | | | |
| | Active | | Pay T | ype Hourly | | • | |
| Job Description | Bartender | - | Wage Amo | ount | Show | w/Hide | |
| Security Group | Bartender 👻 | | - | 🖂 Apply | tip credit | | |
| Auto Login | None | | IMPORTA
VAGES FI | NT NOTICE A | BOUT VEEK | LY HOURS | AND |
| | 🔽 Pickup all employee checks | | It is the so | ole responsibil | ity of the use | r to ensure | that |
| | ✓ Assign RFID or swipe card on clo | ockin | this produ
state and | ct are properly
federal labor a | configured t
nd pay wage | io comply v
laws. | rith |

14. If this is an employee that does not ring checks, do not check the **Pickup all employee checks** option box. If this employee is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe card on clockin** option box.

mployee Secu	urity Finger Print Job & Wages Address Pl
Employee job	and wage detail
	Active
Job Description	Bartender 🗨
Security Group	Bartender 🗨
Auto Login	None
— Г	Pickup all employee checks
	Assign RFID or swipe card on clockin

15. If this Employee is making less than minimum wage and the tip credit set up under the System applet applies, check the **Apply Tip Credit** option box.

Employee Sec	urity Finger Print Job & Wages Add	Iress Phone numbers	Tills/Pockets Sc	cheduling Tracking Alerts/Ema
Employee job	and wage detail			
	Active	Pay	Type Hourly	•
Job Description	Bartender	💌 🛛 🖌 Wage Am	ount	Show/Hide
Security Group	Bartender 🗨		🔽 Apply tip	credit
Auto Login	None	IMPORT/ VAGES F	ANT NOTICE ABO	UT VEEKLY HOURS AND
	🔽 Pickup all employee checks	It is the s	ole responsibility	of the user to ensure that
	Assign RFID or swipe card on clock	kin this produ state and	federal labor and	nfigured to comply with pay wage laws.

16. When you press the Save button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee." Click No.

Confirm	
?	Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee.
	Yes No

You have the option to add an Address, Phone numbers or Notes to this employee. You also may wish to add them to a schedule. You would not use Tracking for Employees that do not ring checks.

The second product of	Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
---	----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------

- 17. Repeat steps 1 through 16 to add another employee.
- 18. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

		P
r~		
UB B	800 1024 🖎	•
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5.3.2 Add Non Banking Server

To add a non banking server (*In cashier environments, a server may not take payments for their checks*) do the following:

Under the **General** applet, click on **Employees**.



The top half of the screen on the left displays a list of employees already entered into the system.

Employee list				
Search by last name	e by first name		🗖 Hide inactive	empl
First Name	Last Name	User ID	Current Employee Job List	
Bart	Bartender	Bartender	Bartender	
Blade	Bartender	Blade17	Manager	
Busboy	Busboy	Busboy14		
Carrie	Cashier	Cashier		
Joe	Cory	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager		

The bottom half of the screen is where you add new employees.

					na				
Employee Secu	rity Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
Employee								+ A	.dd 🗕 D
Employee #	5				Left/Right hand	ed Right ha	nded	•	
First name	Bart				Button S	ze Small bu	ttons	-	
Last name	Bartender				Driver Dispat	ch Advance	ed 💌		
Employee Type	SoftTouch Emp	loyee	-		Assignment Mo	de (^{r.a.a.}			
Social security #		Show/Hi	de						
Birthday	[-							
Employment date		-							
Group Name		141 - 5411							
	🔽 Dealer Acco	unt							

Add Non Banking Server

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the server's first and last name and select SoftTouch Employee as the **Employee Type**.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

5. Click on the **Security** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	l
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

The screen below will appear:

Employee Security Finger Print Job & Wages Address	Phone numbers Tills/Pockets Scheduling Tracking Al
Security	
Active/Account Disabled Is account locked: System User ID Bartender Backoffice	SoftTouch Swipe id/RFID never expires Leave cashout money under original employee Concurrent user logon Show bank detail amounts
Change Password Password expires 3/30/1900	Can clockout without closing out <u>Swipe ID/RFID expires</u> Never Change Swipe ID Change RFID

- 6. Enter the employee's name in the **System User ID** field.
- 7. Press the Change Swipe ID button, and swipe the server's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the **Job & Wages** tab.

Employee Security	Finger Print Job & Wages	Address F	hone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
The following sc	reen will appear:							
Employee Security	Finger Print Job & Wages	Address F	hone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	No
Employee job and	wage detail						+ Ad	d
Job Description	Active Pickup all employee checks Assign RFID or swipe card or	▼	Pay T Wage Am IMPORTA VAGES F It is the so the weekly this produ state and	ype ount ✓ Apply NT NOTICE A EATURES! ole responsibil hours and way federal labor a	tip credit BOUT VEEKI ity of the use ges calculatio configured t nd pay wage l	v/Hide Y HOURS r to ensure on features o comply v laws.	AND e that s of eith	

9. Select the Employees job from the drop down selection by **Job Description**. In this case, we are adding the Server Job Description.

ee job a	and wage detail	
	✓ Active	Pay Type Hourly 👻
cription		Wage Amount Show/Hide
Group	Description	
circap	Bar Help	Apply tip credit
o Login	Bartender	BTANT NOTICE ABOUT VEEKLY HOUR
	Bus Help	S FEATURES!
1	Cashier	e sole responsibility of the user to ens
1	Dish Help	oduct are properly configured to comp
	Driver	and federal labor and pay wage laws.
	Hostess	
	Kitchen Help	T

10. Select the Employees security level from the drop down selection by **Security Group**. You will most likely have a security group for Servers. If so, select it.

	Active			
		Pay Typ	be Hourly	
b Description	Bartender	📕 📕 🕹 Wage Amou	int	Show/Hide
ecurity Group			Apply tip	credit
Auto Login	Administrator	IMPORTAN	T NOTICE ABO	UT VEEKLY HOURS ANI
	Asst. Manager Rartender	VAGES FE/	ATURES! e responsibilite	of the user to ensure tha
	Cashier	the weekig h	ours and wages	calculation features of
	Dealer	n this product state and fe	deral labor and	nfigured to comply with pay wage laws.
	Drivers			
	Employee			
	kd an a market	-		

- 11. You may want to set the Auto Login for Dining so that this employee will be taken to the Dining mode to ring up checks when they swipe their card or enter their number at a workstation.
- 12. Select whether this Employee is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee Secu	urity Finger Print Job & Wages Address F	Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email
Employee job	and wage detail	
	✓ Active	Pay Type Hourly
Job Description	Bartender 🔹	Wage Amount Overtime Exempt
Security Group	Bartender 🗨	Apply tip credit
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that
	🔽 Assign RFID or swipe card on clockin	the weekly hours and wages calculation features of this product are properly configured to comply with state and federal labor and pay wage laws.

13. Enter the weekly or hourly wage this Employee is paid in the **Wage Amount** field.

Employee Sec	urity Finger Print Job & Wages Addre	ss Phone numbers Tills/Pockets Scheduling Tracking Alerts/Ema
Employee job	and wage detail	
	✓ Active	Pay Type Hourly 👻
Job Description	Bartender	Wage Amount Show/Hide
Security Group	Bartender 🗨	Apply tip credit
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND VAGES FEATURES!
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that the weekle hours and wages calculation features of
	Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.

- 14. For a server that does not access other employees checks, do not check the **Pickup all employee checks** option box. If this employee is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe card on clockin** option box.
- 15. Servers generally make less than minimum wage. If this server is making less than minimum wage and the tip credit set up under the System applet applies, check the **Apply Tip Credit** option box.

Employee Sec	urity Finger Print Job & Wages Address	Phone numbers Tills/Pockets Scheduling Tracking Alerts/Emai
Employee job	and wage detail	
	Active	Pay Type Hourly 🗾
Job Description	Bartender 👻	Wage Amount
Security Group	Bartender 🗾	Apply tip credit
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that
	✓ Assign RFID or swipe card on clockin	the weekly nours and wages calculation reatures or this product are properly configured to comply with state and federal labor and pay wage laws.

16. When you press the **Save** button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee."

Confirm		
?	Does this employee carry his/her own bank? Choose Yes to create a pock	et for this employee.

An employee that carries their own bank is not tied to a particular station. They can cash out a customer/guest at any station that their bank was assigned to and must place the money and/or checks in their bank (usually the employee's pocket).

Since this is a non banking server, select No.

You have the option to add an Address, Phone numbers or Notes to this employee. You also may wish to add them to a schedule.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	ĺ
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

Add Tracking Totals

You may want to track certain totals for employees that ring up checks that don't already appear on their reports. You can create a tracking group for a Super Department, a Department, a Family Group or a Menu Item. Managers may wish to use these tracking groups to hold contests for the employee who sells the most desserts in an effort to promote sales of new or slow selling items.

17. Click on the **Tracking** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Votes	
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	--

18. You can select a Super Department, Department or Family group by clicking in the blank area beneath the desired header and selecting from the drop down list, then click the **Save** button at the right side of the screen.

En	nployee Security Finger Prin	nt Job & Wages	Address Phone numbers	Tills/Pockets Scheduling	Tracking	Alerts/Email/SMS	Notes
Er	nployee tracking						
	Copy Records Paste Record	s				🕈 Add	- Delete
Π	Super Department	Department	Family	Item #			
>	Liquor 🗾 💌						
	Beer Drinks Food Liquor						
	Merchandise Pizza Pool Tables 🛛 🔻 🔻						

19. To add a second tracking group, click on the blank area beneath the desired header and select from the drop down list, then click the **Save** button at the right side of the screen.

Employee Security Fing	er Print Job & Wages Ad	dress Phone numbers Tills/	Pockets Scheduling	Tracking Alerts/Email/SMS Notes
Employee tracking				
Copy Records Paste R	ecords			+ Add - Delete
Super Department	Department	Family	Item #	
Liquor				
*	1	-		
	Department Food Liquor Pizza Beer Pool Tables Rentals	*		

20. If you want to track a particular menu item, you will need to get the menu item number by going to Item Builder then find and highlight the item you wish to track. You will see the menu item number on the right side of the screen.

Modifiers Items Links Mai	in Menus Button properties
Builder	Button Text Font Color
Item	Key Lime Pie Key Lime
🖃 🌐 Item Builder	Internal image 🔽 Hide Button Pie
Pizza	Custom image
En Salads	Clear button image
Appetizers	Item properties
e Pasta	Item # 11022
E Steaks	Item Name Roy Lime Pie
E Seafood	Print Name Key Lime Pie
Hings	Receipt
Hold Subs	Family Desserts
E Sides	
🔁 🖬 Desserts	Priority
Cannoli	Barcode/PLU
Tiramisu	Enable Scale
Key Lime Pie	🔽 Boll Modifiers \$ 🗖 86 🖾 Allow Befills (Kiosk)
🕀 🔚 Beverages	Vision International Internati
🗄 🖕 Cocktail A 🖶 🖕 Cocktail B	Do not print on check/receipt if \$0

20. Once you have the number of the menu item you wish to track, enter that number in the **Item #** field, then click the **Save** button at the right side of the screen.

E	mployee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
E	mployee	tracking	9								
	Copy Rec	ords Pa	iste Records]						+ Add	- Delete
-	Super De	partment		Department		Family		Item #			
	Liquor										
				Pool Tables							
>								Q			
1											

- 21. Repeat steps 1 through 20 to add another non banking server.
- 22. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

				-(X
	۲×1	<	É.	7	
	100	3 800	1024	SZ.	•
I -Bowl Pasta					-

5.3.3 Add Self-Banking Server

To add a self-banking server (*a server who accepts payments for their checks*) do the following:

Under the General applet, click on Employees.



The top half of the screen on the left displays a list of employees already entered into the system.

imployee list				
Search by last nam	e by first name			🔲 Hide inactive empl
First Name	Last Name	User ID	*	Current Employee Job List
Bart	Bartender	Bartender		Bartender
Blade	Bartender	Blade17		Manager
Busboy	Busboy	Busboy14		
Carrie	Cashier	Cashier		
Joe	Согу	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager		

The bottom half of the screen is where you add new employees.

Employee Secur	rity Finger Print Job & Wages	Address	Phone numbers	Tills/Pockets S	cheduling	Tracking	Alerts/Email/SMS	6 Notes	
Employee							+/	Add 🗕 🕻)
Employee #	5			Left/Right handed	Bight har	nded	-		
First name	Bart			Button Size	e Small but	tons	-		
Last name	Bartender			Driver Dispatch	Advance	d 👻	_		
Employee Type	SoftTouch Employee	•		Assignment Mode					
Social security #	Show/Hi	de							
Birthday									
Employment date									
Group Name									
	Dealer Account								

Add Non Banking Server

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the server's first and last name and select SoftTouch Employee as the **Employee Type**.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

5. Click on the **Security** tab.

						č.			
Employee Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
NEOCOLOGICA CONTRACTOR OF THE OWNER OWNER OF THE OWNER OWNE		1	and the second	International second s second second sec		Constant and the second second second		Research and the second second	1.0225.0155

The screen below will appear:

Employee Security Finger Print Job & Wages Addres	s Phone numbers Tills/Pockets Scheduling Tracking Ale
Security	
 Active/Account Disabled Is account locked: System User ID Bartender 	SoftTouch ✓ Swipe id/RFID never expires ✓ Leave cashout money under original employee ✓ Concurrent user logon
Backoffice Change Password Password expires 2/20/1900	Show bank detail amounts Can clockout without closing out <u>Swipe ID/RFID expires</u> Never

- 6. Enter the employee's name in the System User ID field.
- 7. Press the Change Swipe ID button, and swipe the server's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the Job & Wages tab.

Employee	Security	Finger Prin	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	l
			and the second s								÷.

The following screen will appear:

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	No
Employe	e job and	l wage detai							+ Ad	Ы
	ম	Active			Pay	Туре		•		
Job Descr	iption			-	Wage Am	iount	Sho	w/Hide		
Security 6	âroup]		🔽 Apply	tip credit			
Auto I	Login 🦳		•		IMPORT/		BOUT VEEK	LY HOURS	AND	
	$\overline{\mathbf{v}}$	Pickup all em	ployee checks		It is the s	ole responsibil	lity of the use	er to ensure	e that s of	
	M	Assign RFID (or swipe card on	clockin	this prod state and	federal labor a	configured and pay wage	to comply laws.	with	

adding the Server Job Description.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/

Employee job and wage detail

	Active	Pay Type Ho	urly 👻		
ob Description		Wage Amount	Show/Hide		
Security Group	Description				
	Bar Help		Apply tip credit		
Auto Login	Bartender	BTANT NOTI	CE ABOUT VEEKLY HOURS AND		
	Bus Help	SFEATURES	5!		
	Cashier	e sole respo	nsibility of the user to ensure than ad wages calculation features of		
	Dish Help	oduct are pro	operly configured to comply with		
	Driver	and federal la	bor and pay wage laws.		
	Hostess				
	Kitchen Help	+			

10. Select the Employees security level from the drop down selection by **Security Group**. You will most likely have a security group for Servers. If so, select it.

inbiologee Decc		ages Addiess F	none numbers This/F	OCKEIS SC	neuuling Hacking	Alerts
mployee job	and wage detail					
	Active		Pay Type	Hourly	•	
b Description	Bartender	-	Wage Amount		Show/Hide	
ecurity Group			F	Apply tip (credit	
Auto Login	Administrator Asst, Manager	1		DTICE ABOU	JT VEEKLY HOURS A	ND
	Bartender		It is the sole res	ponsibility o	of the user to ensure	that
	Cashier	n	the weekly hours this product are	s and wages properly co	calculation features nfigured to comply wi	of
	Dealer		state and federa	l labor and p	ay wage laws.	
	Drivers					
	Employee Managers	+				

- 11. You may want to set the Auto Login for Dining so that this employee will be taken to the Dining mode to ring up checks when they swipe their card or enter their number at a workstation.
- 12. Select whether this Employee is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee Secu	urity Finger Print Job & Wages Address	Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email					
Employee job	and wage detail						
	🔽 Active	Pay Type Hourly					
Job Description	Bartender 💌	Wage Amount Overtime Exempt					
Security Group	Bartender 🗾	V Apply tip credit					
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND					
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that					
	🔽 Assign RFID or swipe card on clockin	the weekly hours and wages calculation features of this product are properly configured to comply with state and federal labor and pay wage laws.					

13. Enter the weekly or hourly wage this Employee is paid in the **Wage Amount** field.

Employee Sec	urity Finger Print Job & Wages Addre	ss Phone numbers Tills/Pockets Scheduling Tracking Alerts/Ema
Employee job	and wage detail	
	✓ Active	Pay Type Hourly 👻
Job Description	Bartender	Wage Amount Show/Hide
Security Group	Bartender 🗨	Apply tip credit
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND VAGES FEATURES!
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that the weekle hours and wages calculation features of
	Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.

- 14. For a server that does not access other employees checks, do not check the **Pickup all employee checks** option box. If this employee is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe card on clockin** option box.
- 15. Servers generally make less than minimum wage. If this server is making less **than minimum wage** and the tip credit set up under the System applet applies, check the Apply Tip Credit option box.

Employee Sec	urity Finger Print Job & Wages Address Ph	one numbers Tills/Pockets Scheduling Tracking Alerts/Emai			
Employee job	and wage detail				
	Active	Pay Type Hourly			
Job Description	Bartender 🗨	Wage Amount Show/Hide			
Security Group	Bartender 🗨	Apply tip credit			
Auto Login	None 🗨	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND			
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that the weekly hours and wages calculation features of			
	Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.			

16. When you press the **Save** button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee."

Confirm	
?	Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee.
	Yes <u>N</u> o

An employee that carries their own bank is not tied to a particular station. They can cash out a customer/guest at any station that their bank was assigned to and must place the money and/or checks in their bank (usually the employee's pocket).

Since this is a banking server, select Yes.

You have the option to add an Address, Phone numbers or Notes to this employee. You also may wish to add them to a schedule.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------

Add Tracking Totals

You may want to track certain totals for employees that ring up checks that don't already appear on their reports. You can create a tracking group for a Super Department, a Department, a Family Group or a Menu Item. Managers may wish to use these tracking groups to hold contests for the employee who sells the most desserts in an effort to promote sales of new or slow selling items.

17. Click on the **Tracking** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	I.
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	----

18. You can select a Super Department, Department or Family group by clicking in the blank area beneath the desired header and selecting from the drop down list, then click the Save button at the right side of the screen.

E	mployee Security Finger	r Prin	it Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
E	mployee tracking									
	Copy Records Paste Rec	cord	s						+ Add	- Delete
	Super Department		Department		Family		Item #			
>	Liquor	-					1			
	Beer Drinks Food Liquor Merchandise Pizza Pool Tables	•								

19. To add a second tracking group, click on the blank area beneath the desired header and select from the drop down list, then click the **Save** button at the right side of the screen.

Emp	oloyee Security Finge	r Print Job & Wages	Address Phone number	ers Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
Em	ployee tracking							
C	opy Records Paste Re	cords					+ Add	- Delete
S	uper Department	Department	Family		Item #			
L	iquor							
*		J.	-					
		Department Food Liquor Pizza Beer Pool Tables Rentals	•					

20. If you want to track a particular menu item, you will need to get the menu item number by going to Item Builder then find and highlight the item you wish to track. You will see the menu item number on the right side of the screen.

Modifiers Items Links Ma	ain Menus Button properties
Builder	Button Text Font Color
Item	Key Lime Pie Key Lime
⊡•⊞ Item Builder	Internal image Hide Button
🕀 i Pizza	
Burgers	
E Annetizers	
E Soups	Item properties
🕀 Pasta	(Item # 11022)
🗄 🔤 Steaks	Item Name literature Pie
Enclicken and Veal	
H. Searood	
E Cold Subs	Receipt
Hot Subs	Family Desserts
🗄 🖬 Sides	Prioritu
Desserts	
Cannoli	Barcode/PLU
- Cheese Cake	Enable Scale 🗸
Key Lime Pie	Roll Modifiers C 86 C Allow Befills (Kiosk)
🗄 🖥 Beverages	V Insell Display
🕀 🚾 Cocktail A	Do not print on check/receipt if \$0
🕀 🔚 Cocktail B	

20. Once you have the number of the menu item you wish to track, enter that number in the **Item #** field, then click the **Save** button at the right side of the screen.

E	mployee Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
E	mployee tracki	ng								
	Copy Records F	Paste Records]						+ Add	- Delete
-	Super Departmen	t I	Department		Family		Item #			
	Liquor									
			Pool Tables							
>										

- 21. Repeat steps 1 through 20 to add another self-banking server.
- 22. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

		_	
	141 - 4		1
	008	800 1024	%
L-Bowl Pasta			

5.3.4 Add Cashier

Under the **General** applet, click on **Employees**.



The top half of the screen on the left displays a list of employees already entered into the system.

imployee list				
Search by last nam	e by first name			🔲 Hide inactive empl
First Name	Last Name	User ID	*	Current Employee Job List
Bart	Bartender	Bartender		Bartender
Blade	Bartender	Blade17		Manager
Busboy	Busboy	Busboy14		
Carrie	Cashier	Cashier		
Joe	Согу	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager		

The bottom half of the screen is where you add new employees.

Employee Secur	ity Finger Print Job & Wages	Address	Phone numbers	Tills/Pockets S	cheduling	Tracking	Alerts/En	nail/SMS	Notes
Employee								+ Ad	1 — D
Employee #	5			Left/Right handed	Bight ha	nded	•		
First name	Bart			Button Size	Small bu	tons	-		
Last name	Bartender			Driver Dispatch	Advance	ed 👻	_		
Employee Type	SoftTouch Employee	-	Ι	Assignment Mode					
Social security #	Show/Hic	le							
Birthday									
Employment date									
Group Name									
	Dealer Account								

Add Cashier

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the cashier's first and last name and select SoftTouch Employee as the **Employee Type**.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

If you are doing delivery at this restaurant, and this cashier will assign deliveries to drivers, select Advanced for the **Driver Dispatch Assignment Mode.** This allows a cashier to assign deliveries to themselves or any driver that is clocked in.

5. Click on the **Security** tab.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS	Notes
---	-------

The screen below will appear:

mployee Security Finger Print Job & Wages	Address Phone numbers Tills/Pockets Scheduling Tracking /
Security	
 Active/Account Disabled s account locked: System User ID Bartender 	SoftTouch Swipe id/RFID never expires Leave cashout money under original employee Concurrent user logon
Backoffice Change Password	Show bank detail amounts Can clockout without closing out Swipe ID/RFID expires
Password expires 3/30/1900	Never Change Swipe ID Change RFID

- 6. Enter the employee's name in the **System User ID** field.
- 7. Press the Change Swipe ID button, and swipe the cashier's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the Job & Wages tab.

Security	Finger Prin	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	Ì
	Security	Security Finger Print	Security Finger Print Job & Wages	Security Finger Print Job & Wages Address	Security Finger Print Job & Wages Address Phone numbers	Security Finger Print Job & Wages Address Phone numbers Tills/Pockets	Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling	Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking	Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS	Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS Notes

The following screen will appear:

Employee Sec	curity Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/	/SMS No
Employee job	and wage detai	il							+ Add
	Active			Pay	Туре		-		
Job Description			-	Wage Am	iount	Sho	w/Hide		
Security Group			1		, M Apply	tip credit			
Auto Login		-					LY HOURS	AND	
	🔽 Pickup all em	ployee checks		It is the s	ole responsibil	lity of the use	r to ensur	e that	
	🔽 Assign RFID	or swipe card on	clockin	this prod state and	uct are properly federal labor a	s configured t and pay wage	to comply laws.	with	

9. Select the Employees job from the drop down selection by **Job Description**. In this case, we are adding the Cashier Job Description.

Employee job	and wage detail							
citipioyee job	anu waye uecan							
	Active	Pay Type Hourly						
Job Description	▼	Wage Amount Show/Hide						
Security Group	Description							
occany areap	Bar Help	Apply tip credit						
Auto Login	Bartender	RTANT NOTICE ABOUT VEEKLY HOURS AND						
	Bus Help	S FEATURES! e sole responsibility of the user to ensure that ekly hours and wages calculation features of oduct are properly configured to comply with and federal labor and pay wage laws.						
	Cashier							
	Dish Help							
	Driver							
1	Hostess							
	Kitchen Help	•						

10. Select the Employees security level from the drop down selection by **Security Group**. You will most likely have a security group for Cashiers. If so, select it.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS Notes

Employee job	and wage detail		+ Add	- Delete
	I Active	Pay Type Hourly 🗸		
Job Description	Cashier 🗸	Wage Amount Show/Hide		
Security Group	Cashier 🗨	Apply tip credit		
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND		
	Pickup all employee checks	It is the sole responsibility of the user to ensure that		
	Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.		

- 11. You can set the Auto Login so this employee will be taken to the mode you select here to ring up checks when they swipe their card or enter their number at the workstation. If this cashier is closing checks for servers, you may wish to select Dining mode. If they will be ringing up counter orders, you may wish to select Counter mode. If you leave this field at None, they will select the mode they wish to work in after they swipe their card or enter their number to log onto the system.
- 12. Select whether this Employee is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee Secu	urity Finger Print Job & Wag	es Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Ema	il/SMS N	Votes
Employee job	and wage detail							+ Add	- Delete
	🔽 Active		Pay	Type Hourly		-			
Job Description	Cashier	-	Wage Am	iount	Sho	w/Hide			
Security Group	Cashier	•		, IZ Apply	tip credit				
Auto Login	None	•	IMPORT. VAGES F	ANT NOTICE A	BOUT VEEK	LY HOURS	AND		
	🔽 Pickup all employee check	s	It is the s	ole responsibil	ity of the use	r to ensure	e that		
	Assign RFID or swipe card	on clockin	this prod state and	uct are properly federal labor a	configured t and pay wage	to comply to laws.	rith		

13. Enter the weekly or hourly wage this Employee is paid in the **Wage Amount** field.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS Notes

Employee job	and wage detail		+ Add	- Delete
	✓ Active	Pay Type Hourly		
Job Description	Cashier 🔹	Wage Amount Show/Hide		
Security Group	Cashier 🗨	Apply tip credit		
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND		
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that		
	Second Se	this product are properly configured to comply with state and federal labor and pay wage laws.		

- 14. If this cashier will access other employees checks, check the **Pickup all employee checks** option box. If this cashier is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe card on clockin** option box.
- 15. Cashiers generally make at least minimum wage so you would not check the **Apply Tip Credit** option box.

Employee Secu	urity Finger Print Job & Wages Address Ph	one numbers Tills/Pockets Scheduling Tracking Alerts/Emai				
Employee job	and wage detail					
	I✓ Active	Pay Type Hourly				
Job Description	Bartender 🗸	Wage Amount Show/Hide				
Security Group	Bartender 💽	Apply tip credit				
Auto Login	None 💌	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND				
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that the weekly hours and wages calculation features of				
	Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.				

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16. When you press the **Save** button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee." Click No.

Confirm		x
?	Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee	e.
	Yes No	

An employee that carries their own bank is not tied to a particular station. They can cash out a customer/guest at any station that their bank was assigned to and must place the money and/or checks in their bank (usually the employee's pocket). This is usually used for self banking servers.

You have the option to add an Address, Phone numbers or Notes to this employee. You also may wish to add them to a schedule.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	Ì
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

Add Till(s)

17. Click on the **Tills/Pockets** tab.

Employee Security Finger Print Job & Wages Address F	Phone numbers Tills/Pockets	Scheduling Tracking	Alerts/Email/SMS N	otes
--	-----------------------------	---------------------	--------------------	------

- 18. You need to add the till(s) that this cashier will use.
- 18 A. If there is one till that this cashier uses EVERY time they close checks, add that till under the **Employee assigned tills/pockets** section on the left.

Click the + Add button under the **Employee assigned tills/pockets** section and from the drop-down menu below select the cash drawer from the list that this cashier will be using.

Employee Security Finger Print Job & Wa	iges Address	Phone numbers	Tills/Pockets	Scheduling	Tracking
Employee assigned tills/pockets + Add □ Delete ✓ Save ★ Undo Copy Records Paste Records		Employee as + Add Copy Record	signable tills Delete 🛷 St Is Paste Becc	ive SCUnd	þ
Assigned tills/pockets	-	 ▲ Assignable t 	ills		
Drawer Name Cassi Eubank Pocket	_ ^				
Joe Cory Pocket Mike Texas Pocket Sandy Server's Poclet Test Employee Pocket					
Till #1					
Till #2 iTable Till	-				

- 18B. If this cashier uses different tills, depending on what workstation they are working at on any given day, add that till under the **Employee assignable tills** section on the right.
- Click the + Add button under the **Employee assignable tills** section and from the drop-down menu below select the cash drawer from the list that this cashier will be using.

Employee Security Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking
Employee assigned tills/pocke	ts		Employee as	signable tills		
◆ Add	S Undo		+ Add -	Delete 🧭 Sr	ive 🛛 🖓 Und	
Copy Records Paste Records			Copy Record	s Paste Reco	irds	
Assigned tills/pockets		I	 Assignable t 	ills		
						-
			Till/Pocket			
			Till #1			
			Till #2			
			iTable Till			

19. If this cashier will use more than one till, repeat step 18A or 18B to add another till.

Add Tracking Totals

You may want to track certain totals for employees that ring up checks that don't already appear on their reports. You can create a tracking group for a Super Department, a Department, a Family Group or a Menu Item. Managers may wish to use these tracking groups to hold contests for the employee who sells the most desserts in an effort to promote sales of new or slow selling items.

20. Click on the **Tracking** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	l
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

21. You can select a Super Department, Department or Family group by clicking in the blank area beneath

the desired header and selecting from the drop down list, then click the **Save** button at the right side of the screen.

E	mployee Security Finger Prir	nt Job & Wages	Address Phone r	numbers Tills/Pocke	ts Scheduling	Tracking	Alerts/Email/SMS	Notes
E	mployee tracking							
	Copy Records Paste Record	ls					+ Add	- Delete
Г	Super Department	Department	Fami	ly	Item #			
>	Liquor							
	Beer Drinks Food Liquor Merchandise Pizza Pool Tables							

22. To add a second tracking group, click on the blank area beneath the desired header and select from the drop down list, then click the **Save** button at the right side of the screen.

En	nployee Security Finge	r Print Job & Wages Addre	ess Phone numbers Tills	/Pockets Scheduling	Tracking	Alerts/Email/SMS	Notes
Er	nployee tracking						
	Copy Records Paste Re	cords				+ Add	- Delete
	Super Department	Department	Family	Item #			
	Liquor						
*			_				
		Department Food Liquor Pizza Beer Pool Tables Rentals					

23. If you want to track a particular menu item, you will need to get the menu item number by going to Item Builder then find and highlight the item you wish to track. You will see the menu item number on the right side of the screen.

Modifiers Items Links Main Menus	Button properties
Builder	Button Text Font Color Key Lime
∃ · ∰ Item Builder	Internal image Hide Button Pie Custom image Clear button image
Soups Soups Soups Steaks Chicken and Yeal	Item properties
Wings Gold Subs G	Receipt Family Desserts
E Cannoli E Tiramisu Cheese Cake	Barcode/PLU Enable Scale
Everages Cocktail A Cocktail B	 ✓ Roll Modifiers \$ ☐ 86 / Allow Refills (Kiosk) ✓ Upsell Display ✓ Non Taxable ✓ Do not print on check/receipt if \$0

24. Once you have the number of the menu item you wish to track, enter that number in the **Item #** field, then click the **Save** button at the right side of the screen.

Em	nployee Security Finger	Print Job & Wages Add	ress Phone numbers Tills/	/Pockets Scheduling Trac	king Alerts/Email/SMS	Notes
En	nployee tracking					
(Copy Records Paste Rec	cords			+ Add	- Delete
	Super Department	Department	Family	Item #		
1	Liquor					
		Pool Tables				
>						
				\sim		
>		I du radies				

- 25. Repeat steps 1 through 24 to add another cashier.
- 26. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

	r< <	
	5 11 fb (fb 4	100 1024 🔦 🔸
L-Bowl Pasta		

5.3.5 Add Bartender with Assigned Till

To add a bartender that has an assigned till, do the following:

Under the General applet, click on Employees.



The top half of the screen on the left displays a list of employees already entered into the system.

Employee list New	employee "Wizard"			
Employee list				
Search by last nam	e by first name			🗖 Hide inactive empl
First Name	Last Name	User ID	*	Current Employee Job List
▶ Bart	Bartender	Bartender		Bartender
Blade	Bartender	Blade17		Manager
Busboy	Busboy	Busboy14		
Carrie	Cashier	Cashier		
Joe	Cory	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager		
100			+	

The bottom half of the screen is where you add new employees.

Employee Secu	rity Finger Print Job & Wages Address	Phone numbers Tills/Pockets S	cheduling T	racking Alerts/En	nail/SMS Notes
Employee					+ Add -
Employee #	5	Left/Right handed	d Right hande	ed 💌	
First name	Bart	Button Size	e Small buttor	ns 🔻	
Last name	Bartender	Driver Dispatch	n Advanced		
Employee Type	SoftTouch Employee	Assignment Mode	a (
Social security #	Show/Hide				
Birthday	•				
Employment date	_				
Group Name					
	🔽 Dealer Account				
Add Barte	nder				

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the bartender's first and last name and select SoftTouch Employee as the Employee Type.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

If you are doing delivery at this restaurant, and this bartender will assign deliveries to drivers, select Advanced for the **Driver Dispatch Assignment Mode.**

5. Click on the **Security** tab.



The screen below will appear:

Employee Security Finger Print Job & Wage	es Address Phone numbers Tills/Pockets Scheduling Tracking Al
Security	
 Active/Account Disabled Is account locked: System User ID Bartender Backoffice Change Password Password expires 3/30/1900 	SoftTouch Image: Swipe id/RFID never expires Image: Leave cashout money under original employee Image: Concurrent user logon Image: Show bank detail amounts Image: Concurrent user logon Image: Show bank detail amounts Image: Concurrent user logon Image: Show bank detail amounts Image: Concurrent user logon Image: Swipe ID/RFID expires Never Change Swipe ID Change RFID

- 6. Enter the bartender's name in the **System User ID** field.
- 7. Press the Change Swipe ID button, and swipe the bartender's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the Job & Wages tab.

Employee	Security	Finger Prin	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	Ì
----------	----------	-------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

The following screen will appear:

Employee Sec	urity Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	No
Employee job	and wage detai	i						+ Ad	ld
Job Description Security Group Auto Login	 ✓ Active ✓ Active ✓ Pickup all em ✓ Assign RFID of 	ployee checks or swipe card on	clockin	Pay Wage Am IMPORT/ VAGES F It is the s the week! this produ state and	Type ount ✓ Apply ANT NOTICE A EATURES! ole responsibil g hours and wa lot are properly federal labor a	Sho tip credit BOUT VEEK ity of the use ges calculati g configured (and pay wage	VHide LY HOURS on features to comply t laws.	AND e that s of eith	

9. Select the Employees job from the drop down selection by **Job Description**. In this case, we are adding the Bartender Job Description.

ree job	and wage detail			
	🔽 Active	Pay Ty	e Hourly	•
cription		Vage Amou	nt 🗌	Show/Hide
Group	Description	-	and a second second	
	Bar Help		🔽 Apply ti	p credit
o Login	Bartender	BTAN	T NOTICE AB	OUT VEEKLY HOURS
	Bus Help	S FE	ATURES!	
	Cashier	e sol	e responsibility	s calculation features
	Dish Help	oduci	are properly o	onfigured to comply a
	Driver	and fe	deral labor and	d pay wage laws.
	Hostess			
	Kitohan Halo	+		

10. Select the Employees security level from the drop down selection by **Security Group**. You will most likely have a security group for Bartenders. If so, select it.

00722 300	anu waye uctan			
	Active	Рау Тура	e Hourly	-
b Description	Bartender	🗾 🛛 🖌 Wage Amoun	t	Show/Hide
ecurity Group			Apply tip	credit
Auto Login	Administrator		NOTICE ABO	UT VEEKLY HOURS AND
	Bartender	It is the sole	l URES! responsibility (of the user to ensure tha
	Cashier	the weekig ho	urs and wages	calculation features of
	Dealer	state and fed	eral labor and	pay wage laws.
	Drivers			
	Employee			
	kd an a mark	-		

- 11. You may want to set the Auto Login for Bar so that this bartender will be taken to the Bar mode to ring up checks when they swipe their card or enter their number at a workstation.
- 12. Select whether this Bartender is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee Secu	urity Finger Print Job & Wages Address P	hone numbers Tills/Pockets Scheduling Tracking Alerts/Email				
Employee job	and wage detail					
	✓ Active	Pay Type Hourly				
Job Description	Bartender 🗸	Wage Amount				
Security Group	Bartender 🗨	P Apply tip credit				
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND				
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that				
	🔽 Assign RFID or swipe card on clockin	the weekly hours and wages calculation reatures or this product are properly configured to comply with state and federal labor and pay wage laws.				

13. Enter the weekly or hourly wage this Bartender is paid in the Wage Amount field.

Employee Sec	urity Finger Print Job & W	/ages Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Ema
Employee job	and wage detail						
	Active		Pay	Type Hourly		-	
Job Description	Bartender	-	Wage Am	iount	Sho	w/Hide	
Security Group	Bartender	-		Apply	tip credit		
Auto Login	None	•			BOUT VEEK	LY HOURS	AND
	Pickup all employee ch	ecks	It is the s	ole responsibi	lity of the use	er to ensure	e that s of
	Assign RFID or swipe of	ard on clockin	this prod state and	uct are properi federal labor a	y configured and pay wage	to comply laws.	eith

14. If this bartender does not access other employees checks, do not check the **Pickup all employee checks** option box. If they do, place a check in the Pickup all employee checks option box.

If this employee is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe** card on clockin option box.

15. If this bartender is making less than minimum wage and the tip credit set up under the System applet applies, check the **Apply Tip Credit** option box.

Employee Secu	urity Finger Print Job & Wages Address Ph	none numbers Tills/Pockets Scheduling Tracking Alerts/Emai			
Employee job	and wage detail				
	Active	Pay Type Hourly 🗸			
Job Description	Bartender 🗨	Wage Amount Show/Hide			
Security Group	Bartender 🗾	Apply tip credit			
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND			
	🔽 Pickup all employee checks	WAGES FEATURES! It is the sole responsibility of the user to ensure that the working hours and wages calculation features of			
	🔽 Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.			

16. When you press the Save button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee."

Confirm	
?	Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee.
	<u>Yes</u> <u>N</u> o

An employee that carries their own bank is not tied to a particular station. They can cash out a customer/guest at any station that their bank was assigned to and must place the money and/or checks in their bank (usually the employee's pocket).

Since this is a bartender, select No.

You have the option to add an Address, Phone numbers or Notes to this employee. You also may wish to add them to a schedule.

	19	11	- V			85				U
Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes

Add Till(s)

17. Click on the **Tills/Pockets** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	Ì
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

You will need to add the till(s) this bartender will use.

You will use the **Employee assigned tills/pockets** if there is one till that this bartender uses EVERY time they close checks. Add that till under the **Employee assigned tills/pockets** section on the left.

18. Click the + Add button under the **Employee assigned tills/pockets** section and from the drop-down menu below select the cash drawer from the list that this cashier will be using.

mployee assigned tills/pockets + Add □□ Delete ✓ Save Ⅹ Ur	ndo	Employee assignable tills + Add Delete 2 Save 24 Loop
Copy Records Paste Records		Copy Records Paste Records
Assigned tills/pockets		Assignable tills
T ill #1	-	
Drawer Name	^	
Cassi Eubank Pocket		
Joe Cory Pocket		
Mike Texas Pocket	_	
Sandy Server's Poclet		
Test Employee Pocket	_	
Till #1		
Till #2	247.0	

19. Click the Save button.

Add Tracking Totals

You may want to track certain totals for employees that ring up checks that don't already appear on their reports. You can create a tracking group for a Super Department, a Department, a Family Group or a Menu Item. Managers may wish to use these tracking groups to hold contests for the employee who sells the most desserts in an effort to promote sales of new or slow selling items.

20. Click on the **Tracking** tab.

Employee	Security Finger Pr	nt Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	l
----------	--------------------	----------------	---------	---------------	---------------	------------	----------	------------------	-------	---

21. You can select a Super Department, Department or Family group by clicking in the blank area beneath the desired header and selecting from the drop down list, then click the **Save** button at the right side of the screen.

Employee Security Finger Prin	t Job & Wages Address	Phone numbers	Tills/Pockets Scheduling	Tracking Alerts/Email/SM	S Notes
Employee tracking					
Copy Records Paste Records				+ Add	- Delete
Super Department	Department	Family	Item #		
> Liquor 🗸 🗸					
Beer Drinks Food Liquor Merchandise Pizza Pool Tables					

22. To add a second tracking group, click on the blank area beneath the desired header and select from the drop down list, then click the **Save** button at the right side of the screen.

mployee tracking				
Copy Records Paste R	ecords			+ Add - Delet
Super Department	Department	Family	Item #	
Liquor				
	1	-		
	Department	×		
	Food			
	Pizza			
	Beer			
	Pool Tables			
	Rentals	÷.		

23. If you want to track a particular menu item, you will need to get the menu item number by going to Item Builder then find and highlight the item you wish to track. You will see the menu item number on the right side of the screen.

Modifiers Items Links Main M	Menus Button properties
Builder	Button Text Font Color
Item	Key Lime Pie Key Lime
🖃 🌐 Item Builder	Internal image Hide Button
Pizza	Custom image
⊞. a Salads	Clear button image
Appetizers	Item properties
en Pasta	Item # 11022 Active
E Steaks	Item Name likevisme Pie
En Seafood	Print Name Key Lime Pie
🛱 · 🖬 Wings	Beceint
🖻 🔚 Cold Subs	Hecept
Hot Subs	Family Desserts
Him Sides	Priority 🔶
Cannoli	Barcode/PLU
Tiramisu	Enable Scale
Key Lime Pie	Boll Modifiers \$ B6 Allow Befills (Kiosk)
🕀 🔚 Beverages	Visite in the second se
🗄 🖕 Cocktail A 🖶 🖕 Cocktail B	Do not print on check/receipt if \$0

24. Once you have the number of the menu item you wish to track, enter that number in the **Item #** field, then click the **Save** button at the right side of the screen.

E	mployee Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
E	mployee tracking	3								
	Copy Records Pa	iste Records							+ Add	- Delete
	Super Department	D	epartment		Family		Item #			
	Liquor									
		P	ool Tables					-		
>										

- 25. Repeat steps 1 through 24 to add another cashier.
- 26. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

			-		X
	IM	<	2	1	F
	000	3 800	1024	€Z	•
I -Bowl Pasta					

5.3.6 Add Bartender with Assignable Tills

To add a bartender that assigns their own till, depending on the workstation they are working at on any given day, do the following:

Under the General applet, click on Employees.



The top half of the screen on the left displays a list of employees already entered into the system.

Employee list				
Search by last name	e by first name			🥅 Hide inactive empl
First Name	Last Name	User ID		Current Employee Job List
Bart	Bartender	Bartender		Bartender
Blade	Bartender	Blade17	Ĵ	Manager
Busboy	Busboy	Busboy14		-ŭn
Carrie	Cashier	Cashier		
Joe	Cory	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager		

The bottom half of the screen is where you add new employees.

Employee Secu	rity Finger Print Job & Wages Address	Phone numbers Tills/Pockets Sc	cheduling Tracking	Alerts/Email/SMS Notes
Employee				+ Add - D
Employee #	5	Left/Right handed	Right handed	•
First name	Bart	Button Size	Small buttons	-
Last name	Bartender	Driver Dispatch Assignment Mode	Advanced 🗸	_
Employee Type	SoftTouch Employee			
Social security #	Show/Hide			
Birthday				
Employment date				
Group Name				
	🔽 Dealer Account			

Add Bartender

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the bartender's first and last name and select SoftTouch Employee as the **Employee Type**.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

If you are doing delivery at this restaurant, and this bartender will assign deliveries to drivers, select Advanced for the **Driver Dispatch Assignment Mode**.

5. Click on the **Security** tab.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS Notes

The screen below will appear:

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Ale	
Security										
 Active/Account Disabled Is account locked: System User ID Bartender 					SoftTouch Swipe id/RFID never expires Leave cashout money under original employee Concurrent user logon					
Backoffi Cha Passwo 3/30/19	ice ange Passv r <u>d expires</u> 300	vord		4	I Show ban Can clock Swipe ID/RFII Never Change Swip	<pre>< detail amounts out without closi <u>) expires oe ID Ch </u></pre>	ng out ange RFID]		

- 6. Enter the bartender's name in the **System User ID** field.
- 7. Press the Change Swipe ID button, and swipe the bartender's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the **Job & Wages** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	ĺ
											<u>.</u>

The following screen will appear:
Employee Sec	curity Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SM	S No
Employee job	and wage detai	il						+/	Add
	Active			Pay	Туре		-		
Job Description			-	Wage Am	iount	Sho	w/Hide		
Security Group		•]		🖂 Apply	tip credit			
Auto Login		•		IMPORT/	ANT NOTICE A	BOUT VEEK	LY HOURS	AND	
	🔽 Pickup all em	ployee checks		It is the s	ole responsibil	ity of the use	r to ensure	that	
	🔽 Assign RFID	or swipe card on	clockin	this prod state and	federal labor a	configured t nd pay wage	io comply v laws.	rith	

9. Select the Employees job from the drop down selection by **Job Description**. In this case, we are adding the Bartender Job Description.

mployee job	and wage detail		
	✓ Active	Pay Type Hourly	•
ob Description		Wage Amount	Show/Hide
ecurity Group	Description		
	Bar Help	Apply Apply	y tip credit
Auto Login	Bartender	BTANT NOTICE A	BOUT VEEKLY HOURS AND
	Bus Help	S FEATURES!	
	Cashier	e sole responsible	lity of the user to ensure tha des calculation features of
	Dish Help	oduct are proper	y configured to comply with
	Driver	and federal labor	and pay wage laws.
	Hostess		
	Kitchen Help	T	

10. Select the Employees security level from the drop down selection by **Security Group**. You will most likely have a security group for Bartenders. If so, select it.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Ema

Employee job	and wage detail			
Job Description	Active Bartender	•	Pay Type Hourly	Show/Hide
Security Group Auto Login	Administrator Asst. Manager	-	Apply tip credi	t TEEKLY HOURS AND
	Bartender Cashier Dealer Drivers	n	It is the sole responsibility of th the weekly hours and wages calc this product are properly configu state and federal labor and pay w	e user to ensure that ulation features of ared to comply with rage laws.
	Employee Managers	+		

- 11. You may want to set the Auto Login for Bar so that this bartender will be taken to the Bar mode to ring up checks when they swipe their card or enter their number at a workstation.
- 12. Select whether this Bartender is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee S	ecurity	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email
Employee j	ob and	wage detai	1						
	v A	Active			Pay	Type Hourly		-	
Job Descripti	on Bart	ender		-	Wage Am	nount Overtime	Exempt		
Security Gro	up Bart	ender	-]		🖂 Apply	tip credit		
Auto Log	gin Non	ie	•		IMPORT.		BOUT VEEK	LY HOURS	AND
	⊡ F	^p ickup all em	ployee checks		It is the s	ole responsibi	lity of the use	er to ensure	e that
	⊠ A	Assign RFID (or swipe card on	i clockin	this prod state and	uct are properly federal labor a	y configured and pay wage	to comply laws.	with

13. Enter the weekly or hourly wage this Bartender is paid in the **Wage Amount** field.

Employee Secu	urity Finger Print Job & Wages Address Pho	one numbers Tills/Pockets Scheduling Tracking Alerts/Ema
Employee job	and wage detail	
	I▼ Active	Pay Type Hourly
Job Description	Bartender 🗸	Wage Amount Show/Hide
Security Group	Bartender 🗸	Apply tip credit
Auto Login	None	IMPORTANT NOTICE ABOUT VEEKLY HOURS AND VAGES FEATURES!
	🔽 Pickup all employee checks	It is the sole responsibility of the user to ensure that the weekly hours and wages calculation features of
	Assign RFID or swipe card on clockin	this product are properly configured to comply with state and federal labor and pay wage laws.

14. If this bartender does not access other employees checks, do not check the **Pickup all employee checks** option box. If they do, place a check in the Pickup all employee checks option box.

If this employee is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe** card on clockin option box.

15. If this bartender is making less than minimum wage and the tip credit set up under the System applet applies, check the **Apply Tip Credit** option box.

Employee Sec	urity Finger Print Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Emai
Employee job	and wage detail						
	Active		Pay	Type Hourly		-	
Job Description	Bartender	•	Wage Am	iount	Sho	w/Hide	
Security Group	Bartender 💽	Ι		P Apply	tip credit		
Auto Login	None				BOUT VEEK	LY HOURS	AND
	🔽 Pickup all employee checks		It is the s	ole responsibil	ity of the use	er to ensure	that
	Assign RFID or swipe card on	clockin	this prod state and	uct are properly federal labor a	ind pay wage	to comply v laws.	rith

16. When you press the Save button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee."

Confirm	
2	Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee.

An employee that carries their own bank is not tied to a particular station. They can cash out a customer/guest at any station that their bank was assigned to and must place the money and/or checks in their bank (usually the employee's pocket).

Since this is a bartender, select No.

You have the option to add an Address, Phone numbers or Notes to this employee. You also may wish to add them to a schedule.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	l
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

Add Till(s)

17 Click on the Tills/Pockets tab	
	- 7
Employee Security Finger Print Job & Wages Address Phone number Tills/Pockets Scheduling Tracking Alerts/Email/SMS N	ntes

You will need to add the till(s) this bartender will use.

- If this bartender uses different tills, depending on what workstation they are working at on any given day, add that/those till(s) under the **Employee assignable tills** section on the right.
- 18. Click the + Add button under the **Employee assignable tills** section and from the drop-down menu below select the cash drawer from the list that this cashier will be using.

Employee Security Finger Print Job & Wages Ad	dress Phone numbers Tills/Pockets Scheduling Tracking
Employee assigned tills/pockets	Employee assignable tills
+ Add □ Delete	+ Add - Delete Save S Undo
Copy Records Paste Records	Copy Records Paste Records
Assigned tills/pockets	Assignable tills
	Till/Pocket
	Till #2
	iTable Till

19. If this bartender will use more than one till, repeat step 18 to add another till.

Add Tracking Totals

You may want to track certain totals for employees that ring up checks that don't already appear on their reports. You can create a tracking group for a Super Department, a Department, a Family Group or a Menu Item. Managers may wish to use these tracking groups to hold contests for the employee who sells the most desserts in an effort to promote sales of new or slow selling items.

20. Click on the **Tracking** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	Ĺ
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

21. You can select a Super Department, Department or Family group by clicking in the blank area beneath the desired header and selecting from the drop down list, then click the **Save** button at the right side of the screen.

					107
Employee Security Finge	er Print Job & Wages	Address Phone numbers	Tills/Pockets Scheduling	Tracking Alert	s/Email/SMS Notes
Employee tracking					
Copy Records Paste Re	ecords				+ Add - Del
Super Department	Department	Family	Item #		
> Liquor	-				
Beer Drinks Food Liquor					
Pizza Pool Tables	+				

22. To add a second tracking group, click on the blank area beneath the desired header and select from the drop down list, then click the **Save** button at the right side of the screen.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS Notes

E	mployee tracking				
	Copy Records Paste Re	ecords			+ Add - Delete
	Super Department	Department	Family	Item #	
	Liquor				
*					
		Department Food Liquor Pizza Beer Pool Tables Rentals			

23. If you want to track a particular menu item, you will need to get the menu item number by going to Item Builder then find and highlight the item you wish to track. You will see the menu item number on the right side of the screen.



Modifiers Items Links	Main Menus	Button properties
Builder		Button Text Font Color
tem		Key Lime Pie Key Lime
∃•⊞ Item Builder	1	Internal image
🗄 🚰 Pizza		Custom image
🗄 🔚 Burgers		Custom image
🕀 🔚 Salads		Clear button image
Hereitzers		Item properties
E and Deste		
		Item # 11022 IV Active
E Chicken and Yeal		Item Name Key Lime Pie
E Seafood		Print Name Key Lime Pie
🗄 🖕 Wings		
🗄 🔚 Cold Subs		Heceipt
🗄 🔚 Hot Subs		Family Desserts
🗄 🔚 Sides		Prioritu
E Desserts		
Cannoli		Barcode/PLU
E Chasse Cale		Enable Scale
Lneese Lake		
Reverages		✓ Roll Modifiers \$ ☐ 86 ☑ Allow Refills (Kiosk)
E Cocktail A		🔽 Upsell Display 🛛 🕅 Non Taxable
		Do not print on check/receipt if \$0

24. Once you have the number of the menu item you wish to track, enter that number in the **Item #** field, then click the **Save** button at the right side of the screen.

Employee Security Finger Print Job & Wages Address Phone numbers Tills/Pockets Scheduling Tracking	9 Alerts/Email/SMS Notes
Employee tracking	
Copy Records Paste Records	+ Add - Delete
Super Department Department Family Item #	
Liquor	
Pool Tables	

- 25. Repeat steps 1 through 24 to add another cashier.
- 26. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

	P^ ~	~ 1
		00 1024 🔦 🔸
L-Bowl Pasta		

5.3.7 Add Manager

To add a manager, do the following:

Under the General applet, click on Employees.



The top half of the screen on the left displays a list of employees already entered into the system.

Employee list New	employee "Wizard"			
Employee list				
Search by last name	e by first name			🔲 Hide inactive empl
First Name	Last Name	User ID		Current Employee Job List
▶ Bart	Bartender	Bartender		Bartender
Blade	Bartender	Blade17		Manager 🛛
Busboy	Busboy	Busboy14	1	
Carrie	Cashier	Cashier		
Joe	Cory	Joe19		
Dealer	Dealer Company	softtouchadmin		
Driver	Driver Last Name	Driver		
New	Employee	New 13		
Cassi	Eubank	Cassandra		
Manager	Manager Last Name	Manager	+	

The bottom half of the screen is where you add new employees.

-				11				
Employee Secu	rity Finger Print Job & \	Vages Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
Employee							+ 4	vdd 🗕 D
Employee #	5			Left/Right hande	d Right har	nded	•	
First name	Bart			Button Siz	e Small but	tons	•	
Last name	Bartender			Driver Dispatch	Advance	d 👻		
Employee Type	SoftTouch Employee			Assignment Mode				
Social security #	S	how/Hide						
Birthday	-	[
Employment date	·							
Group Name								
	🔽 Dealer Account							

Add Manager

- 1. Click the + Add button in the **Employee detail** area.
- 2. Enter the manager's first and last name and select SoftTouch Employee as the **Employee Type**.
- 3. Make sure the Active checkbox is checked. **Note:** you may deactivate an employee without deleting his/her info for later activation again by selecting/unselecting the Active checkbox.
- 4. Social security, Birthday and Employment date are optional fields.

You can create a Group Name and assign it to employees for additional sorting in other areas of SoftTouch. For example, you may wish to add a Front of House and a Back of House group. When asked in other areas of SoftTouch for a Group Name, you will be able to sort accordingly.

5. Click on the **Security** tab.



The screen below will appear:

Employee Security Finger Print Job & Wages Addres	s Phone numbers Tills/Pockets Scheduling Tracking Al					
Security						
✓ Active/Account Disabled Is account locked: System User ID Bartender Backoffice	SoftTouch ✓ Swipe id/RFID never expires ✓ Leave cashout money under original employee ✓ Concurrent user logon ✓ Show bank detail amounts ✓ Can clockout without closing out					
Change Password Password expires 3/30/1900	Swipe ID/RFID expires Never Change Swipe ID Change RFID					

- 6. Enter the manager's name in the **System User ID** field.
- 7. Press the Change Swipe ID button, and swipe the manager's card. Place your cursor in the confirm Swipe ID field and swipe the card again. Press the Ok button when finished. (If you are not using swipe cards, just enter the number in both fields and press the Ok button)

Assign Job

8. Click on the **Job & Wages** tab.

Employee Security Finger Print Job & Wages	Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS Notes
The following screen will appear:	
Employee Security Finger Print Job & Wages	Address Phone numbers Tills/Pockets Scheduling Tracking Alerts/Email/SMS No
Employee job and wage detail	+ Add
Job Description Security Group Auto Login V Pickup all employee checks V Assign RFID or swipe card on c	Pay Type ✓ Wage Amount ✓ Apply tip credit IMPORTANT NOTICE ABOUT VEEKLY HOURS AND VAGES FEATURES! It is the sole responsibility of the user to ensure that the weekly hours and wages calculation features of this product are properly configured to comply with state and federal labor and pag wage laws.

9. Select the Employees job from the drop down selection by **Job Description**. In this case, we are adding the Manager Job Description.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alertsz
									100 C

	Active	Pay Type Hour	ly 👻				
ob Description		Vage Amount	Show/Hide				
Security Group	Description						
	Bar Help		pply tip credit				
Auto Login	Bartender	BTANT NOTIC	E ABOUT VEEKLY HOURS AN				
	Bus Help	S FEATURES!					
	Cashier	e sole respons	sibility of the user to ensure that wages calculation features of				
	Dish Help	oduct are prop	perly configured to comply with				
	Driver	and federal lab	and federal labor and pay wage laws.				
	Hostess						
	Kitchen Heln	*					

10. Select the Employees security level from the drop down selection by **Security Group**. You will most likely have a security group for Managers. If so, select it.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	
Employe	e job and	wage detai	1						+ Ad	d <mark>—</mark> De	
	.	Active			Pay	Type Hourly		-			
Job Descr Security 6	iption Ma àroup Ma	nager nagers	-	1	Wage Am	iount	Sho	w/Hide			
Auto I	Login Ba Ca De Dri Err	Bartender Cashier Dealer Drivers Employee			IMPORTANT NOTICE ABOUT VEEKLY HOURS AND VAGES FEATURES! It is the sole responsibility of the user to ensure that the weekly hours and wages calculation features of this product are properly configured to comply with state and federal labor and pay wage laws.						
	Ma Ov Se	nagers vner rver		•							

- 11. Usually for a manager, you will keep the Auto Login field as None.
- 12. Select whether the Manager is paid Hourly or if they are Overtime Exempt (Salaried) from the drop down selection by **Pay Type**.

Employee Se	ecurity Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
Employee jo	b and wage detai	il						+ Ad	d <mark>—</mark> Di
	Active			Pay	Type Hourly		-		
Job Descriptio	n Manager		-	Wage Am	iount	Sho	w/Hide		
Security Grou	P Managers	•]		I Apply	tip credit			
Auto Log	n None	-		IMPORTANT NOTICE ABOUT VEEKLY HOURS AND					
	🔽 Pickup all emp	ployee checks		It is the s	ole responsibil	lity of the use	r to ensure	e that s of	
	🔽 Assign RFID o	or swipe card on	clockin	this product are properly configured to comply with state and federal labor and pay wage laws.					

13. Enter the weekly or hourly wage this Manager is paid in the **Wage Amount** field.

Employee	Securit	y Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes
Employee	e job ar	id wage deta	il						+ Add	i <mark>—</mark> De
	V	Active			Pay	Type Hourly		-		
Job Descrip	ption 🛛	lanager		-	Wage Am	nount	Sho	w/Hide		
Security G	roup 🚺	lanagers]		🔽 Apply	tip credit			
Auto L	.ogin 🖪	lone	-		IMPORTA			LY HOURS	AND	
		Pickup all em	ployee checks		It is the s	ole responsibil	ity of the use	r to ensure	e that	
	.⊡	Assign RFID	or swipe card or	ı clockin	this prod state and	uct are properly federal labor a	ges calculati configured (and pay wage	to comply a laws.	rith	

14. If this Manager is allowed to access other employees checks, check the **Pickup all employee checks** option box.

If this Manager is keeping the same swipe card to clock in, do not check the **Assign RFID or swipe** card on clockin option box.

- 15. Do not check the **Apply Tip Credit** option box.
- 16. When you press the **Save** button, you will be asked "Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee."

Confirm	
?	Does this employee carry his/her own bank? Choose Yes to create a pocket for this employee.
	Yes No

For Managers, usually you select No. If this Manager will be closing checks for other employees, you will want to add all tills as described in Step 17.

You have the option to add an Address, Phone numbers or Notes to this Manager. You also may wish to add them to a schedule.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes	l
----------	----------	--------------	-------------	---------	---------------	---------------	------------	----------	------------------	-------	---

Add Till(s)

113

17. Click on the **Tills/Pockets** tab.

Employee	Security	Finger Print	Job & Wages	Address	Phone numbers	Tills/Pockets	Scheduling	Tracking	Alerts/Email/SMS	Notes

You may need to add till(s) so this Manager can close out checks for other employees.

Add all tills under the **Employee assigned tills/pockets** section on the left.

18. Click the + Add button under the **Employee assigned tills/pockets** section and from the drop-down menu below select the cash drawer from the list that this cashier will be using.



- 19. Click the Save button.
- 20. Repeat steps 17 through 19 to add additional tills.
- 21. Repeat steps 1 through 19 to add another Manager.
- 22. When finished, click on the red X in the top right corner of the screen to close BackOffice and return to the SoftTouch screen.

	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
L-Bowl Pasta	

5.3.8 Employee Wizard

The **Employee Wizard** is designed to assist in employee set up by guiding you through the process and allowing you to copy settings from an employee that is already set up the same way you wish to set up the new employee.

Under the **General** applet, click on **Employees**.



The top half of the screen on the left displays a list of employees already entered into the system.

1. Click the **New Employee "Wizard"** tab.

by first name			🥅 Hide inactive empl
ast Name	User ID		Current Employee Job List
artender	Bartender		Bartender
artender	Blade17		Manager 🛛
usboy	Busboy14		-715
Cashier	Cashier		
Cory	Joe19		
ealer Company	softtouchadmin		
Driver Last Name	Driver		
mployee	New 13		
ubank	Cassandra		
lanager Last Name	Manager		
	by first name ast Name artender artender usboy ashier ory lealer Company triver Last Name mployee ubank Ianager Last Name	by first name User ID attender Blade17 usboy Busboy14 ashier Cashier ory Joe19 vealer Company softtouchadmin priver Last Name Driver mployee New 13 ubank Cassandra Manager Last Name Manager	by first name User ID attender attender Blade17 usboy Busboy14 ashier Cashier ory Joe19 realer Company softtouchadmin priver Last Name Driver mployee New 13 ubank Cassandra Hanager Last Name Manager

2. From the **New Employee Wizard** screen, click the **Click here to start adding a new employee** button.



3. From the **Employee details** screen, you **MUST** enter a first and last name. As indicated, these are required fields. Social security #, Birthday and Employment date fields are all optional. When finished, click on the **Next** button at the bottom right of the screen.

916		
Wizdid		
ee information below	please note that some	fields are required to
ee momation below	, piease note that some	neius are requireu (o
	Bequired	
	Required	
	'Wizard''	Wizard" ee information below, please note that some Required Required

4. From the **Address and Phone #** screen, all fields are optional. When finished, click on the **Next** button at the bottom right of the screen.

Employee list New	employee "Wizard"				
Address and	I Phone #				
Please enter the add	ress and phone # inform	ation for this employee	í.		
-					
Please enter an	address and phone m	number for this emp	oloyee, if you do not	have this	
	you may skip to the i	next step.			
Address					
Description 🔢	me	-			
Address1					
Address2					
City					
State	•				
Zip code					
Phone #					
Area Code					
Phone #					
Extension					
Description					

5. From the **Security Settings** screen, you can copy settings that another employee is using or you can manually configure the Security Settings.



urity Settings	
se set your security settings	
ease fill in any security settings y	ou wish this employee to perform, you may hover your
ouse on top of any label for a brie	of moment to get a more detail explanation for the item.
you're not sure which settings to	use then you may want to pick an employee from the drop down
o use that employees settings. This	s will configure all settings shown in the box below.
Global System User ID Leif21	
Global System User ID Leif21	
Global System User ID Leif21	
Global System User ID Leif21 Swipe id never expires Leave cashout money under origina	al employee
Global System User ID Leif21 Swipe id never expires Leave cashout money under origina Concurrent user logon	al employee
Global System User ID Leiř21 ✓ Swipe id never expires ✓ Leave cashout money under origina ✓ Concurrent user logon ✓ Show bank detail amounts	al employee

5A. To copy settings that another employee is using, select the employee that is already configured the way you want this employee to be configured from the drop down list of employees. Once you select an employee, you will be asked to confirm that you wish to duplicate the selected employees settings for the new employee you are creating.

nployee list New employee "Wizard"	
ecurity Settings ease set your security settings	
lease fill in any security setting ouse on top of any label for a b you're not sure which settings o use that employees settings. T	is you wish this employee to perform, you may hover your brief moment to get a more detail explanation for the item. to use then you may want to pick an employee from the drop down This will configure all settings shown in the box below.
Bartender, Blade Bartender, Blade Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	

5B. If you wish to manually configure this employees security settings, select the options you wish to enable.

<u>Swipe id never expires</u> - This employees number or swipe ID card does not expire. Check this unless this employee is using a RFID bracelet that will be collected when they clock out and re-assigned when they clock back in the next day.

<u>Leave cashout money under original employee</u> - This is usually only checked for Managers, who will close a check for another employee, but give the employee they closed the check for the money collected. <u>Concurrent user logon</u> - This means that this employee can be logged onto more than one workstation at the same time.

<u>Show bank detail amounts</u> - Select this if you wish for this employee to be able to see bank detail amounts <u>Can clockout without closing out</u> - This is selected if you wish to require this employee to closeout before they clock out.

OVER 11ST THE MENTION PROPERTY AND	
curity Settings	
ise set your security settings	
ease fill in any security settings you wi	ish this employee to perform, you may hover your
ouse on top of any label for a brief mon	ment to get a more detail explanation for the item.
you're not sure which settings to use to use that employees settings. This will	then you may want to pick an employee from the drop down configure all settings shown in the box below.
Global System User ID Leif21	
Global System User ID Leif21	
Global System User ID Leif21 Swipe id never expires Leave cashout money under original employed	loyee
Global System User ID Leif21 Swipe id never expires Leave cashout money under original empl Concurrent user logon	loyee
Global System User ID Leif21 Swipe id never expires Leave cashout money under original employ Concurrent user logon Show bank detail amounts	loyee

6. The system will assign a System User ID. This is the name that is printed on a guest check, time chits, etc. This is also the User Id that this person will use if they are allowed to access BackOffice. You can change the System User ID to any name you wish to use.

When finished, click on the **Next** button at the bottom right of the screen.

curity Settings	
se set your security settings	
ease fill in any security settings you wish th	is employee to perform, you may hover your
ouse on top of any label for a brief moment	to get a more detail explanation for the item.
you're not sure which settings to use then y	you may want to pick an employee from the drop d
use that employees settings. This will confi	igure all settings shown in the box below.
•	
•	
Global System User ID Leif21	1
Global System User ID Leif21	
 ✓ ✓ Global System User ID Leif21 ✓ Swipe id never expires 	
 ✓ ✓ Global System User ID Leif21 ✓ ✓ Swipe id never expires ✓ Leave cashout money under original employee 	
 ✓ ✓ ✓ Swipe id never expires ✓ Leave cashout money under original employee ✓ Concurrent user logon 	
 ✓ ✓ Global System User ID Leif21 ✓ Swipe id never expires ✓ Leave cashout money under original employee ✓ Concurrent user logon ✓ Show bank detail amounts 	

7. You will only give this employee a BackOffice Password if they are allowed access to BackOffice. If you assign a BackOffice password, it has to be 7 characters with at least one of those characters being a number. For example:password1

You **MUST** enter either a Swipe ID (Swipe a card or enter a number) or Register a Finger Print for this employee to log on to the system. As indicated, these are required fields.

When finished, click on the **Next** button at the bottom right of the screen.

mployee list New employee "Wizard"	
Passwords Assign a backoffice password and softtouch swipe id	
In this screen you may assign a backoffice password, s	wipe id. If you use
fingerprint readers in your system then you must assign Click on the button to set the backoffice password.	the employees fingerprint. Set a BackOffice Password
fingerprint readers in your system then you must assign Click on the button to set the backoffice password.	the employees fingerprint. Set a BackOffice Password Set Swipe ID AND/OR

8. You **MUST** select a **Job Description** from the drop down list. As indicated, this is a required field.

9. You **MUST** select a **Security Group** from the drop down list. As indicated, this is a required field.

10. Select either Hourly or Overtime Exempt (Salaried) for **Pay Type** from the drop down list.

11. Enter an hourly or weekly wage amount in the **Wage Amount** field.

12. If this employee is making less than minimum wage and the Tip Credit that was set up in the **System** applet applies, check the **Apply Tip Credit** option box.

13. When finished, click on the **Next** button at the bottom right of the screen.

loyoo list men employee miles	rd''	
b assignment		
se select a job		
ase select which job this en	nolovee will be performing the secur	rity assigned to
job and please fill in the w	age information.	ity assigned to
elect a job and security	1	
b Description	- Required	
ecurity Group	- Required	
5 S L		
/		
age mionnauon		
12		
- Pay Type Hourly		
Pay Type Hourly	Show/Hide	

The **Job Description** selected above will determine which screens will display for **Banks** selection. All **Job Descriptions** will give you the following prompts except the Server **Job Description**. You can find the screens that display if you are using the New Employee Wizard to add a Server below.

FOR ALL JOB DESCRIPTIONS EXCEPT SERVER

14. From the **Banks** screen, you can copy banks (tills) that another employee is using or you can manually configure the **Banks**.

loyee list New employee "Wizard"		
rtender banks ender banks		
ll this bartender be using a permant	till or will he/she assigning a till on start of sh	nift?
^o ermanent or Assignable		
Permanent		
Assignable		
Assignable		
Assignable Banks		
 Assignable Banks If you're not sure which banks to use 	e then you may want to pick an employee from	n the drop down and then click
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop do w n and then click nks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click nks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that Banks 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click hks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that Banks 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click hks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that Banks 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click nks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that Banks 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click nks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that Banks 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click nks used by the selected employee.
 Assignable Banks If you're not sure which banks to use "use employee settings" to use that Banks 	e then you may want to pick an employee from employees settings. This will configure all ban	n the drop down and then click nks used by the selected employee.

14A. To copy banks that another employee is using, select the employee that already has the banks (tills) you want this employee to have from the drop down list of employees. Once you select an employee, you will be asked to confirm that you wish to duplicate the selected employees bank(s) for the new employee you are creating.

bloyee list New employee "Wizard"				
artender banks tender banks	•			
ill this bartender be using a perr	mant till or will he/she assigning a till on start of sh	hift?		
Permanent or Assignable]			
ີ Permanent				
Assignable				
Assignable				
Assignable Banks				
Assignable Banks	o use then you may want to nick an employee from	n the drop down and th	en click	×.
 Assignable Banks If you're not sure which banks to "use employee settings" to use 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th hks used by the selecto	en click ed emplo	oyee.
Assignable Banks If you're not sure which banks to use	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the selecto	en click ed emplo	oyee.
 Assignable Banks If you're not sure which banks to "use employee settings" to use Bartender, Bart 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the selecto	en click ed emplo	oyee.
 Assignable Banks If you're not sure which banks to "use employee settings" to use Bartender, Bart Bartender, Blade 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the select	en click ed emplo	oyee.
 Assignable Banks If you're not sure which banks to "use employee settings" to use Bartender, Bart Bartender, Blade Busboy, Busboy 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the select	en click ed emplo	oyee.
 Assignable Banks If you're not sure which banks to "use employee settings" to use Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie Conv. Lee 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the select	en click ed emplo	oyee.
 Assignable Banks If you're not sure which banks to "use employee settings" to use Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company Dealer 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the select	en click ed emplo	oyee.
 Assignable Banks If you're not sure which banks to "use employee settings" to use Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver 	o use then you may want to pick an employee from that employees settings. This will configure all bar	n the drop down and th nks used by the select	en click ed emplo	yee.

14B. If you wish to manually configure this employees banks (tills), select the proper options.

<u>Permanent</u> - If there is one till that this employee uses EVERY time they close checks, select Permanent from the **Permanent or Assignable** Option box.

<u>Assignable</u> - If this employee uses different tills, depending on what workstation they are working at on any given day, select Assignable from the **Permanent or Assignable** Option box.

nployee setup - Johnsen, Leif		I	•	
nployee list New employee "Wizard"				
artender banks				
artender banks				
∀ill this bartender be using a permant till o	or will he/she assigning a till on start of shift?			
Permanent or Assignable				
C Permanent				
Banks				
If you're not sure which banks to use the "use employee settings" to use that empl	n you may want to pick an employee from the drop down ar lovees settings. This will configure all banks used by the se	id then c lected e	lick: nolove	e.
	II IIIIII	101111111		
Banks				
+ Add Bank	Bank			
	o dinx.			

Add Bank - Add the Bank(s) this employee will use.

ployee list New employee "Wizard"			
artender banks Itender banks			
ill this bartender be using a permant till	or will he/she assigning a	till on start of shift?	
Permanent or Assignable			
C Permanent			
S LOLINFACIMO			
Assignable			
 Assignable 			
20 - 20 - 20 - 20 - 20 - 20 - 20 - 20 -			
Banks			
Banks If you're not sure which banks to use th "use employee settings" to use that em	hen you may want to pick a plovees settings. This will c	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em	hen you may want to pick a ployees settings. This will o	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em	hen you may want to pick a ployees settings. This will a	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em Banks	hen you may want to pick a ployees settings. This will o	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em Banks	hen you may want to pick a ployees settings. This will d	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em Banks * TILLET Drawer Name	hen you may want to pick a ployees settings. This will d	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use the "use employee settings" to use that em Banks * TITT Drawer Name Cassi Eubank Pocket	hen you may want to pick a poloyees settings. This will d	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use the "use employee settings" to use that em Banks * TILLET Drawer Name Cassi Eubank Pocket Joe Cory Pocket	hen you may want to pick a ployees settings. This will o	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use the "use employee settings" to use that em Banks * Till #1 Drawer Name Cassi Eubank Pocket Joe Cory Pocket Mike Texas Pocket Same Server's Pocket	hen you may want to pick a ployees settings. This will d	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em Banks * TILLEL Drawer Name Cassi Eubank Pocket Joe Cory Pocket Mike Texas Pocket Sandy Server's Poclet Test Employee Pocket	hen you may want to pick a poloyees settings. This will o	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em Banks * THE Drawer Name Cassi Eubank Pocket Joe Cory Pocket Mike Texas Pocket Sandy Server's Poclet Test Employee Pocket Till #1	hen you may want to pick a poloyees settings. This will a	n employee from the configure all banks u	drop down and then click sed by the selected employe
Banks If you're not sure which banks to use th "use employee settings" to use that em Banks * TILL#1 Drawer Name Cassi Eubank Pocket Joe Cory Pocket Mike Texas Pocket Sandy Server's Poclet Test Employee Pocket TILL#1	hen you may want to pick a aployees settings. This will a	n employee from the configure all banks u	drop down and then click sed by the selected employe

16. When finished, click on the **Next** button at the bottom right of the screen.

17. You screen will tell you the New Employee was created. Press the **Finish** button at the bottom right to exit the **New Employee Wizard**.

FOR THE JOB DESCRIPTION OF SERVER

14. If this server will be closing checks and making change out of their own pocket, select **Yes** and click the **Next** button at the bottom right of the screen.

If this server will **not** be closing checks and making change out of their own pocket, select **No** and click the **Next** button at the bottom right of the screen.

mployee list New employee "Wizard"		
Server self banking? Server self banking?		
Will this server be "Self Banking"?	Self Banking?	
	Law York	

15. You screen will tell you the New Employee was created. Press the **Finish** button at the bottom right to exit the **New Employee Wizard**.

Part

General Functions

Part 6 General Functions

6.1 Move Orders

***No longer here

A server or a bartender cannot clock out with open checks. The **Move Orders** button allows a manager to transfer all orders from one server or bartender to another. This function can be used to move all AM bartneder's checks to a PM bartender.

Move Orders Procedure

- 1. Press the **Employee** button at the top right of the screen.
- 2. Press the **Change Employee** button to select the employee who's checks need to be moved.
- 3. Press the **Move Orders** button.
- 4. Press the name of an employee to move orders to.
- 5. All of the orders have now been moved from one employee to another.

6.2 Set OP Date

When the system is Z'ed out at night, the operation date is automatically forwarded so the system date and operation date are the same. If a site accidentally runs the Z procedure twice, or if they were closed for a day and did not Z, the operation date and system date will get off and you may need to use the Set OP Date button to correct this.

*You cannot have open checks in the system when you do this.

If there are only a couple of checks, the site may wish to reset the days checks to zero, set the operation date and ring the checks up again.

If they have too many checks open, they can subtract yesterdays reports from today's reports to get today's information and make sure they correct the problem before the next business day begins.

To Set OP Date

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press **General Functions** icon on the left.
- 3. Press the Set OP Date button at the bottom of the screen.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

4. You will see a Confirmation Dialog box asking you to verify the date. If the date is correct, press Yes.



6.3 Reprint Last Check

To Reprint Last Check

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the **Reprint Last Check** button at the bottom of the screen.

The last check accessed will be printed to the check/receipt printer assigned to the station you are working at.

6.4 Change Employee

A manager may wish to change the employee logged in from themselves to another employee so they can perform functions on their behalf.

To Change Employee

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the Change Employee button at the bottom of the screen.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

- 4. A list of all clocked in employees will appear on the screen. Select which employee you wish to impersonate from the list.
- *Notice at the top left of the screen, you will see the name of the employee you are now logged in as in red next to the word Impersonate.

SoftTouch POS Impersonate: Bartender	Drawer
General Functions	

5. Perform whatever function you wish to on behalf of the employee, then log out.

6.5 System Information

To Obtain System Information

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the **System Information** button at the bottom of the screen.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

A screen will display with the system information.

6.6 Launch BackOffice

The **Launch Backoffice** button allows you to get into the Backoffice directly from SoftTouch, where you can adjust or change the core functionality of how the system operates, specific to the needs of your establishment.

Analogously, you could launch the Backoffice by double clicking on the Backoffice icon on the desktop.

Note: It is recommended to restart SoftTouch front end after you've made any BackOffice changes.

To Launch BackOffice from SoftTouch

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the Launch BackOffice button.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

4. Enter the User ID and Password that you were given to get into the BackOffice.

oftTouch Ba	ackOffice	×
Login Info	ormation	
3	Welcome to SoftTouch, please enter your username and password and press OK or use Figure Press finger on device for 1 secon	
User ID		
Password		
	Login <u>Cancel</u>	
Registerer Vser a Licens	ed to: SoftTouch, LLC agrees to terms and conditions of the Customer se Agreement.	
View Cust	tomer License Agreement	

6.7 System Reset

The **System Reset** button is for dealer use ONLY. It resets all of the data either for the day or all of it, depending on your selection.

The System Reset button is a password protected function.

To Do a System Reset

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the System Reset button at the bottom of the screen.



4. You will see a Confirmation Dialog box that cautions you to shut down the other workstations before proceeding. If you are sure you want to continue, press Yes.



5. You will see an Information Dialog box that warns you that you must manually clear your credit card batch. Once you have acknowledged this, press Ok to continue.



- 6. A typing keyboard will appear and ask you to enter the password. Only authorized dealers have access to this password. It can be obtained by calling the SoftTouch support phone number at 954-482-0288.
- 7. Once you have entered the password, you will be asked to Reset All or Reset Day.

*Reset all will clear all your sales data. This is meant to be used when a site first opens and wants to clear out all the training checks.

Reset Day will clear out all sales for the operation date you are working on only.

Information Dialog	
Reset Type	

Once you make a selection, the system will exit you out of SoftTouch. To launch SoftTouch again, use the icon on the desktop.

6.8 Manager Videos

Manager videos are available to assist with manager training.

To Access Manager Videos

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the Manager Videos button at the bottom of the screen.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

6.9 Alert Shutdown

To Do an Alert Shutdown

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the **Alert Shutdown** button at the bottom of the screen.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

A message will appear indicating that an alert has been sent to the other workstations to complete what they are working on immediately because the terminal is about to shutdown.
6.10 Shutdown Stations

Shutdown Stations

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the General Functions header or icon.
- 3. Press the Shutdown Stations button.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

4. Choose either **ShutDown** or **Terminate** button.

Shutdown button will shutdown all stations from the the master terminal without you having to go physically to each station to turn off the computer.

Terminate button is to terminate all the stations. This will exit all stations out of the SoftTouch System into your Windows Operating System. This will not turn off the computers.

Caution: Executing this function will disrupt your ability to have SoftTouch running on the other stations.

6.11 Remote Session

To view the activity that is occurring on a workstation from BackOffice, you must first go to the station you wish to monitor, and activate the Remote Session.

To Activate a Remote Session

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the **General Functions** header or icon.
- 3. Press the **Remote Session** button.

Set	Reprint	Change	System	Launch	System	Manager	Alert	Shutdown
OP Date	Last Check	Employee	Information	BackOffice	Reset	Videos	Shutdown	Stations
Remote Session	Exit SoftTouch							

4. To activate the **Remote Session**, press yes on the Conformation Dialog box.



You can now go to BackOffice and select this station from the Monitor Stations applet.

6.12 Exit SoftTouch

The **Exit SoftTouch** button gives the choice of:

- Exit the SoftTouch into Windows (Exit to desktop button)
- Restart SoftTouch front end (**Restart SoftTouch** button)
- Exit the SoftTouch and turn off the computer (Power OFF PC button)
- 1. Press the **Manager** icon at the top of the screen.
- 2. Press General Functions icon on the left.
- 3. Press the **Exit SoftTouch** button.



4. Select whether you wish to Exit to Desktop, Restart SoftTouch or Power OFF PC.

Part

Reports

Part 7 Reports

The Reports section will allow you to view and print several reports under the Manager mode. However, there are many more reports available in the Backoffice application.

To Get to Report Screen

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press **Reports** icon on the left.

7.1 Balance (X) Report

Balance (X) report shows only CLOSED checks at the time you take the report.

View or Print Balance Report

- 1. To view a Balance report press the **Balance (X)** button.
- 2. The system will ask you to select the report print size (40 or 80 column).
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

7.2 Department Report

Department Report gives you the day's totals broken down into Food, Beer, Liquor, Wine, Merchandise. You are only viewing closed check totals.

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View or Print Department Report

- 1. To view a Department report press the **Depart. Report** button.
- 2. The system will ask you to select the report print size (40 or 80 column).
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

7.3 Labor Sales Report

Labor Sales report will show all sales and the amount spent on labor up until that point in the day.

View or Print Labor Sales Report

- 1. To view a Labor Sales report press the Labor Sales button.
- 2. The system will ask you to select the report print size (40 or 80 column).
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

7.4 Family Sales Report

Family Sales report will show all sales up until that point in the day broken down into individual families.

View or Print Family Sales Report

- 1. To view a Family Sales report press the Family Sales button.
- 2. The system will ask you to select the report print size (40 or 80 column).
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

7.5 Server Quick Summary Report

Server Quick Summary report shows all relevant sales information up to the time you take the report broken down by individual servers.

View or Print Server Quick Summary Report

- 1. To view a Server Quick Summary report press the **Server Quick Sum** button.
- 2. The system automatically prints in 40 column format.
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

The report will be printed on the receipt printer that is connected to the station.

7.6 Check Detail Report

Check Detail report shows all information for the chosen check.

View or Print Check Detail Report

- 1. To view a Check Detail report press the Check Detail button.
- 2. Enter the desired check number at the prompt.
- 3. The system automatically prints in 80 column format.
- 4. When the report shows on the screen you can print it by pressing the **Print** button.

The report will be printed on the report printer (normal desktop printer).

7.7 Charge Tips

Charge Tips report shows all charge tips for all employees up to the time you take the report broken down by individual servers.

View or Print Charge Tips Report

- 1. To view a Charge Tips report press the **Charge Tips** button.
- 2. The system automatically prints in 40 column format.
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

The report will be printed on the receipt printer that is connected to the station.

7.8 Revenue Centers

Revenue Centers Report gives you the day's totals broken down by the revenue centers set up in BackOffice. You are only viewing closed check totals.

View or Print Revenue Centers Report

- 1. To view a Revenue report press the **Revenue Centers Report** button.
- 2. The system will ask you to select the report print size (40 or 80 column).
- 3. When the report shows on the screen you can print it by pressing the **Print** button.

Part

Overview

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Part 8 Overview

The **Overview** section contains all of the following areas.

- All Checks
- Open Checks
 Closed Checks
- Future Orders
- Offline Checks
- Open Tips

8.1 All Checks

The All Checks tab allows you to view and adjust all checks.

****** If you have a closed check highlighted, you will have the button selection with the options available for closed checks. If you have an open check highlighted, you will have the button selection with the options available for open checks.

Enter the All Checks tab

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the All Checks Overview icon on the left.



You will be brought to a screen that looks like this:

ander	in and	1 202	Drawer Hist	orv Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
50731	049 :44n	Cassandra										69		<
-,						-	3			AT.			(1997)	1
All Chec	ks	Open Checks	Closed Checks	Future Checks	Offline Che	ecks Op	en Tips							
					😲 Only t	he last 50 d	checks are d	isplayed at o	one time, the ch	neck # will o	duplicate for	each additic	onal payment	made.
Drag a c	olumn	n header here t	o group by that	column										
Status Closed	Chec 100	k # 🍐 Check 1 Dinina	Type Seating # 104	Sub Total Delive \$8.50	ry Rounding \$0.00	Tax 1 \$0.51	Gratuity T	ip Total To \$0.00	stal Acco \$9.01 Cash	unt	Payment \$ \$9.01	Owner Cassandra	Cassandra	Create
Closed	101	Par	16	¢0.00	¢0.00	, ¢n 54	, , , , , , , , , , , , , , , , , , ,	•0.00	t0 54 Cach		¢0 54	Partondor	Partondor	Parton
cluseu	101	Dai	10	45.00	φ υ .υι		f \$0.00	\$0.00	49.04 Cd311		φ 5 .34			Darten
Closed	102	Bar		\$U.UU	\$U.UL	J \$U.UL	J \$U.UU	\$0.00	\$U.UU			Bartender	Bartender	Barten
Closed	103	Dining	108	\$0.00	\$0.00) \$0.00) \$0.00	\$0.00	\$0.00			Cassandra	Cassandra	Cassan
Closed	104	Counte	r	\$0.00	\$0.00	\$0.00) \$0.00	\$0.00	\$0.00			Cassandra	Cassandra	Cassan
Closed	105	Dining	107	\$8.50	\$0.00) \$0.51	L \$0.00	\$0.00	\$9.01 Hous	e Account	t \$9.01	Cassandra	Cassandra	Cassan
Closed	106	Dining	107	\$52.50	\$0.00) \$3.15	5 \$0.00	\$0.00	\$55.65 Hous	e Account	t \$55.65	Cassandra	Cassandra	Cassan
Closed	107	Dining	107	\$21.00	\$0.00) \$1.26	i \$0.00	\$0.00	\$22,26 Hous	e Account	t \$22.26	Cassandra	Cassandra	Cassan
•	_	6	27	Y	V				-	_	_			•
	2	Find Check #	Find	Recent	Float Ch	eck	Float Full On/Off	Grou	ip Fi Chec	lter k Type	RePrint Check	Fin	d Past eck #	
The	9													
2 mil	-	ReOpen Check	Refresh Checks											

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8.1.1 Find Check

This button allows you to look up a check by number.

Tip: If you have a serial barcode scanner installed, you can scan a barcode on the check to have the system bring you right to the check without having to search for it.

1. Press the Find Check # button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

2. Enter the check # and press the enter key.

8.1.2 Find Customer

If you are assigning names to a check (bar orders, counter orders) you can pull up checks by the name assigned to that check.

1. Press the Find Customer button at the bottom of the screen



2. Type the name that was assigned to the check you are looking for and press enter

All checks that this name has been assigned to will appear on the screen.

8.1.3 Recent Checks

This button brings up all recent checks (the last 50 checks).

1. Press the Recent Checks button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

A list of the most recent checks will populate the screen.

8.1.4 Float Check On/Off

This button allows you to show or hide the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Check On/Off button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

You will see the check detail for the selected check.

Status	Check #	Check Type	Seating #	Sub Total	Тах	Tip Te	1	A SPARE TO A SPARE THE SET OF	Seat	1
Closed	100	Dining	V10	\$6.00	\$0.36	\$.	60	#V10 - Guest: 1	Jann Jann	
Closed	101	Dining	V11	\$2.50	\$0,15	\$.	50	Seat #1.15 Martin	\$14.50	
Closed	102	Dining	V2	\$6.00	\$0.36	\$	25	Food	\$14.50	
Closed	103	Dining	V2	\$0.00	\$0.00	s:	00	Satami .00	\$1.001010	e
Closed	104	Counter		\$0.00	\$0.00	\$1	100		11 March	e
Closed	105	Dining	V2	\$0.00	\$0.00	\$1	00	\$0.00		6
Closed	106	Counter		\$11.50	\$0.69	\$	60	\$12,19 Dash		e
Open	107	Dining	V10	\$14.58	\$9,87	3				e
										Γ
							_			ľ
								#107	\$15.37	
								(A) Un (Down	

3. Press the Float Check On/Off button again to remove the check detail from the screen.

8.1.5 Float Full On/Off

This button allows you to show or hide a detailed view of the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Full On/Off button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

You will see the check detail for the selected check as well as check stats.

Status	Check #	Check Type		w Tak)C	WV10 - Quest	Scat	-
Closed Closed Closed Closed Closed	100 101 102 103 104	Dhng Dhng Dhng Dhng Counter	Table #: ¥10 Check #: 107 Status: Decup Customer: Party Size: 1 Server: Manar	ied (0, 16 10, 15 10, 16 10, 10 10, 10 10(10)		Seat #1 Food Medium Pizza Salami priori	514. 514. 514. 512. 51	
losed	105	Counter	Check Total: \$15.3 Course:	\$1.69 H	10	\$12.59 L		Manager
daar.	- 1117	Li ti g	List Time: Seated Time: 11:32: Open Time: 11:32: Print Time: 11:32: Close Time: Occupied Min: 23:25	05 am 05 am 22 am				
			Actual/Target: (\$453	.79) / \$468.29		#107	\$15.3	7
			🏫 Up	🕹 Down		1 Up	Duv	00

3. Press the Float Full On/Off button again to remove the check detail from the screen.

8.1.6 Group By

You may find the check you are looking for by pressing the **Group By** button and all orders will be sorted by the user ID under which the check was started. **Note:** By default all closed orders are sorted by Order #.

Group By

1. Press the **Group By** button at the bottom of the screen.



2. Choose the way you would like the orders grouped.



- 3. Press on the small + sign next to the grouping of checks you want to view and the group will expand.
- 4. You can now select the check you need.

- And The second	-h BOG	- 1	Drawer	History	Info	Delivery	Dispatch	n Cou	unter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
6/17 03:06p	Cassand	ra						G				-		0		<
	6			-	-	-	-			-				-		
All Checks	Open Ch	ecks	Closed Ch	ecks	Future Checks	Offline C	hecks ()pen Tip	s							
						😲 Only	the last 5	0 checks	are dis	played at on	e time, the	check # w	ill duplicate fo	r each additi	onal paymen	t made.
Owner	Δ												Name	T	Seat No	
Status (Check # lartender	Chec	k Type Sea	ating #	Sub Total Del	ivery Roun	ding Tax	Gr	atuity	Tip Total 1	fotal	Account	#16 - G	Jest: 1	1 Se	at /
Closed	101	Bar	16		\$9.00		\$0.00	0.54	\$0.00	\$0.00	\$9.54	Cash	Seat #1	9.54 Barten	\$9.00	
Closed :	102	Bar			\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		1 Well Vod	ka Barten	\$3.00	
- Owner : C	assandra										•		1 Well Scot	ch:	\$3.00	
±													1 Well Rum		23,00	U
													-			
													#101		\$9.54	
													្ 🏫 ប	P 9	🖖 Down	
•	(10)		1			-		_				N.	•
0	Fin	id :k #	Fin Custo	d mer	Recent Checks	Float (On/	Check Off	Float On/C	Full Off	Group By	Ch	Filter leck Type	RePrin	: Fin Ch	id Past ieck #	
and and	Ref	nen	Refe	esh												
	Che	ck	Cheo	cks												

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8.1.7 Filter Check Type

You may find the check you are looking for by pressing the **Filter Check Type** button and selecting just a particular order type. This will limit the orders on screen to just that check type, making it easier to find the desired check.

Note: By default all orders are sorted by Order #.

Filter Check Type

1. Press the **Filter Check Type** button at the bottom of the screen.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

2. Choose which Check Type you would like to Filter.



3. You can now select the check you need and select the action desired from the buttons below.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

8.1.8 RePrint Check

The **RePrint Check** button allows to re-print the closed check. It will show DUPLICATE on the top of the check.

RePrint Check

- 1. Select the check you want to re-print.
- 2. Press the **RePrint Check** button.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

8.1.9 Find Past Check

This button allows you to bring up checks from previous operation dates.

1. Press the Find Past Check # button at the bottom of the screen.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

2. Choose the date for the check you are searching and press ENTER.

Today	06/14/	2011	ВК	Clear	Select operation date	
Now	12:00AN	4	ВК	Clear	June, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri S 29 30 31 1 2 3	Sat 4
15 min	2 Days	4	5	6	5 6 7 8 9 10	11 1 0
30 min	3 Days	1	2	3	12 13 14 15 16 17 19 20 21 22 23 24	25
45 min	4 Days	0	AM	PM	26 27 28 29 30 1 3 4 5 6 7 8	2 9
60 min	5 Days	CANCE		INTER	Today: 6/19/2011	

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3. Enter the check number you want to view and it will display on screen.

8.1.10 Adjust Payments

*** No longer here

The **Adjust Payments** button takes you into the cashout screen so you can adjust the tenders or a server's tip.

Adjust Payment

- 1. Select the check you want to change (use the Get Check # button if needed to locate the check).
- 2. Press the Adjust Payments button.
- 3. You'll be taken into the payment screen of this closed check.
- 4. Select the tender that was entered wrong.



5. Right after you select a tender type, a new set of buttons show up at the bottom of the screen.

Remove Tender	 Shows up no matter what the tender was: cash or credit card. Remove Tender button allows to remove one tender at a time. Selected the tender if you haven't already. Press the Remove Tender button. The tender is now removed.
Clear Tenders	 Shows up no matter what the tender was: cash or credit card. Clear Tenders button allows to remove multi-tenders with one click. Select the tender if you haven's already. Press the Clear Tenders button. If you are sure you want to clear all tenders, press YES to the confirmation dialog. All the tenders are now removed.
Adjust Tip	 Shows up only if the tender was a credit card. Select the tender for which you need to adjust the tip. Press the Adjust Tip button. Enter the correct tip amount and press ENTER. Press YES to the confirmation dialog if the tip you entered is correct.

6. If you removed tender or cleared multi-tenders, you need to re-enter the payment just as if you were tendering the check for the first time. (Read the Cash Out explanations under Main Menu Procedures or **click here to go there now**).

8.1.11 ReOpen Check

The **ReOpen Check** button is used for re-opening a check that was closed by mistake.

ReOpen Check

- 1. Highlight the check you want to re-open.
- 2. Press the **ReOpen Check** button.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

3. You will be given the option to Reopen the check or Reopen the check and void the payment off at the same time.



3. A warning will be displayed. Press **Ok**.



- 4. You will then be asked if you are sure you want to re-open this check. Press **YES**.
- 5. Press **Ok** to the information dialog.

The check is now re-opened under the mode it was originally started. **For example:** If the check was initially opened under Dining mode, that is where you will find this check.

8.2 Open Checks

The Open Checks section allows a manager to view all open checks and open tips in the system.

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the All Checks Overview icon on the left.



3. Press Open Checks tab at the top of the screen.

8.2.1 Find Check # (copy)

This button allows you to look up a check by number.

Tip: If you have a serial barcode scanner installed, you can scan a barcode on the check to have the system bring you right to the check without having to search for it.

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1. Press the Find Check # button at the bottom of the screen



2. Enter the check # and press the enter key.

8.2.2 Find Customer

If you are assigning names to a check (bar orders, counter orders) you can pull up checks by the name assigned to that check.

1. Press the Find Customer button at the bottom of the screen



2. Type the name that was assigned to the check you are looking for and press enter

All checks that this name has been assigned to will appear on the screen.

8.2.3 Recent Checks (copy)

This button brings up all recent checks (the last 50 checks).

1. Press the Recent Checks button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	Void	Void
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Order	Waste
Reopen/ Unhide	Resend Check	Edit Order	Refresh Checks					

A list of the most recent checks will populate the screen.

8.2.4 Float Check On/Off (copy)

This button allows you to show or hide the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Check On/Off button at the bottom of the screen

								100
Find Check #	Find Customer	Recent Checks	Float Check On/Off	Float Full On/Off	Group By	Filter Check Type	Void Order	Void Waste
Reopen/ Unhide	Resend Check	Edit Order	Refresh Checks					

You will see the check detail for the selected check.

Status	Check #	Check Type	Seating #	Sub Total	Тах	Tip Te	al Andreas Arcan	Seat
Closed	100	Dining	V10	\$6.00	\$0.36	\$1	00 #V10 - Guest: 1	Janre Janre
Closed	101	Dining	V11	\$2,50	\$0.15	\$.	sh Seat \$1.15 Marte	\$14.50 mp
Closed	102	Dining	V2	\$6.00	\$0.36	\$.	Food	\$12.50 E
Closed	103	Dining	V2	\$0.00	\$0.00	\$1	00 Satami 00	\$1.00
Closed	104	Counter		\$0.00	\$0.00	\$1	00 - toto	11 Avaira
Closed	105	Dining	V2	\$0.00	\$0.00	\$0	00 10.00	Mara
Closed	106	Counter		\$11.50	\$0.69	\$1	00 - 842:49 Bash	Marya
Open	107	Dining	V10	\$14.58	\$9.87	8		H
							#107	\$15.37

3. Press the Float Check On/Off button again to remove the check detail from the screen.

8.2.5 Float Full On/Off

This button allows you to show or hide a detailed view of the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Full On/Off button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	Void	Void
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Order	Waste
Reopen/ Unhide	Resend Check	Edit Order	Refresh Checks					

You will see the check detail for the selected check as well as check stats.

Status	Check #	Check Type		Talk Tip T	ir .	WHO OWN	Seat	CHEN!
Closed	100	Dining	CLUSE WINDOW	40.96 3	100	WID Houest	Sister Land	Janna
Closed	101	Dining	Table #: ¥10		SI S	ieat #1	S14.	50 m
Closed	102	Dhng	Check #: 107	101.76 S	F	Food	\$14.	50
Closed	103	Dining	Status: Occupie	DOLEO N	00	Salami Dizza	512	10 (F
Closed	104	Counter	Party Size: 10.00		ind			Rinter
Closed	105	Dinna	Server: Manage	er enter	1661	10.00		Manuer
Closed	106	Counter	Check Total: \$15.37 Course:		00.0	\$12.591		Manager
Open	107	Einng	List Time:					er
			Seated Time: 11:32:0 Open Time: 11:32:0 Print Time: 11:32:2 Close Time: Decunied Min: 23:25	5 am 5 am 2 am				
			Actual/Target: (\$453.7	9) / \$468.29		#107	\$15.3	7
			A 00 0	Down		<u>ω</u> 🗤 '	J. Do	

3. Press the **Float Full On/Off** button again to remove the check detail from the screen.

8.2.6 Group By (copy)

You may find a closed check you are looking for by pressing the **Group By** button and all orders will be sorted by the user ID under which the check was started. **Note:** By default all closed orders are sorted by Order #.

Group By

1. Press the **Group By** button at the bottom of the screen.



2. Choose the way you would like the orders grouped.



- 3. Press on the small + sign next to the grouping of checks you want to view and the group will expand.
- 4. You can now select the check you need.

SoftToy	ch POS		Drawer Histo	ry Info	Delivery Dispa	atch Counter	Take Out	Pick Up	Bar Dining	Employee Manager
6/19 08:51a	a Cassand	ra				/				
All Checks	Open Ch	ecks	Closed Checks	Future Checks	Offline Checks	Open Tips				
Owner		char	1. .				The T-1-1			
Owner : E	Bartender	Cned	ik type Seating #	sud local Deli	very kounaing i	ax Gracuity	TIP TOCAL	Total Acco	ounc Payme	ent & Lashout by Lreated by
Open	110	Bar	6	\$12.00	\$0.00	\$0.72 \$0.0	0 \$0.00	\$12.72		Bartender
Open	111	Bar	2	\$30.00	\$0.00	\$1.80 \$0.0	0 \$0.00	\$31.80		Bartender
Open	112	Bar	18	\$22.50	\$0.00	\$1.35 \$0.0	0 \$0.00	\$23.85		Bartender
Open	113	Bar	13	\$4.50	\$0.00	\$0.27 \$0.0	0 \$0.00	\$4.77		Bartender
Open	114	Bar	11	\$10.00	\$0.00	\$0.60 \$0.0	0 \$0.00	\$10.60		Bartender
	Cassandra									
1										
•	Eir	d) Eind	Becent	Eleat Check	Float Full	Crew .	n raha	ov Usid	Vaid
_0	Cheo	k #	Customer	Checks	On/Off	On/Off	By	Check	Type Order	Waste
- pro	Reop	oen/	Resend	Edit	Refresh					
	Unh	ide	Check	Order	Checks					

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8.2.7 Filter Check Type

You may find the check you are looking for by pressing the **Filter Check Type** button and selecting just a particular order type. This will limit the orders on screen to just that check type, making it easier to find the desired check.

Note: By default all orders are sorted by Order #.

Filter Check Type

1. Press the **Filter Check Type** button at the bottom of the screen.

Find	Find	Recent	Float Check	Float Full	Group	Filter	Void	Void
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Order	Waste
Reopen/ Unhide	Resend Check	Edit Order	Refresh Checks					

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2. Choose which Check Type you would like to Filter.

	Pick an option	
Ø	Pick a button option	
	All Orders	
	Counter	
	Takeout	
	Dining	
	Bar	
	Delivery	
	DriveThru	
	Cancel	

3. You can now select the check you need.

8.2.8 Void Order

This button allows you to void an order that was not made or poured. You will be given an opportunity to indicate why the order was voided from a picklist.

Void Reasons		
Void Reason List		
Customer changed mind	^	
Didn't like food		
Food prepared wrong		
Food was cold		
Other		
Out of item		
Server rang wrong item		
Cancel	<	

8.2.9 Void Waste

This button allows you to void an order that was made or poured. You will be given an opportunity to indicate why the order was voided from a picklist.

Void Reasons	-
Void Reason List	1
Customer changed mind	
Didn't like food	
Food prepared wrong	
Food was cold	
Other	
Out of item	
Server rang wrong item	
Cancel	

8.2.10 UnHide Check

This button allows you to make a check visible again, so that a payment can be adjusted or to alter a tip. Once you unhide a check, you can access it from the mode it was rung up in. For example, if you unhide a dining check, you can go back to the Dining mode and find the check on the table it was originally rung up on.

8.2.11 Resend Check

You can use the resend button to send the items to the remote printers again.

- 1. Highlight the check you wish to resend
- 2. Press the resend button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	Void	Void
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Order	Waste
Reopen/ Unhide	Resend Check	Edit Order	Refresh Checks					

All items on the check will be resent to the designated printers.

8.2.12 Edit Order

A manager can pick up an open check and make adjustments to an existing order using the Edit Order function.

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- 1. Highlight the check you wish to resend
- 2. Press the **Edit Order** button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	Void	Void
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Order	Waste
Reopen/ Unhide	Resend Check	Edit Order	Refresh Checks					

The check will open and you will be brought to the order screen. From here you can make the necessary modifications.

8.3 Closed Checks

The Closed Checks section allows a manager to view all closed checks in the system.

Enter the Closed Checks tab

- 1. Press the **Manager** icon at the top of your screen.
- 2. Press the All Checks Overview icon on the left.



3. Press Closed Checks tab at the top of the screen.

8.3.1 Find Check # (copy)

This button allows you to look up a check by number.

Tip: If you have a serial barcode scanner installed, you can scan a barcode on the check to have the system bring you right to the check without having to search for it.

1. Press the **Find Check #** button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

2. Enter the check # and press the enter key.

8.3.2 Find Customer

If you are assigning names to a check (bar orders, counter orders) you can pull up checks by the name assigned to that check.

1. Press the Find Customer button at the bottom of the screen



2. Type the name that was assigned to the check you are looking for and press enter

All checks that this name has been assigned to will appear on the screen.

8.3.3 Recent Checks (copy)

This button brings up all recent checks (the last 50 checks).

1. Press the **Recent Checks** button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

A list of the most recent checks will populate the screen.

8.3.4 Float Check On/Off (copy)

This button allows you to show or hide the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Check On/Off button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

Status	Check #	Check Type	Seating #	Sub Total	Тах	Tip Te	AT A SHARE	Seat
Closed	100	Dining	V10	\$6.00	\$0.36	\$:	00 #V10 1 Suest: 1	tortard Danra
Closed	101	Dining	V11	\$2.50	\$0,15	\$.	en Seat #1 s ma	S14.50
Closed	102	Dining	V2	\$6.00	\$0.36	\$	Food	\$14.50 \$12.50 E
Closed	103	Dining	V2	\$0.00	\$0.00	\$1	00 Satami 00	\$1.001010
Closed	104	Counter		\$0.00	\$0.00	\$1	ini - 10.00	1 Maria
Closed	105	Dining	V2	\$0.00	\$0.00	\$0	00 10.00	Maria
Closed	106	Counter		\$11.50	\$0.69	\$0		h Maria
Open	107	Dining	V10	\$14.50	\$9.87	3		122
							#107	\$15.37
								dia nome

You will see the check detail for the selected check.

3. Press the Float Check On/Off button again to remove the check detail from the screen.

8.3.5 Float Full On/Off

This button allows you to show or hide a detailed view of the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Full On/Off button at the bottom of the screen

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

You will see the check detail for the selected check as well as check stats.

Closed 100 Dring Table #: V10 Food \$14.50 Closed 102 Dring Check #: 107 Food \$14.50 Closed 103 Dring Customer: Food \$14.50 Closed 103 Dring Customer: Food \$14.50 Closed 103 Dring Customer: Food \$14.50 Closed 104 Counter Party Size: 1 Food \$100 Food Closed 105 Dring Server: Manager Food Food	Status	Check #	Check Type	CLOSE WINDO	W)	ØV10 - Guest:	1 Seat	Contra A
Open: 107 Linn; List Time: - Seated Time: 11:32:05 am Open Time: 11:32:22 am Clove Time: - Occupied Min: 23:25	Closed Closed Closed Closed Closed Closed	100 101 102 103 104 105 106	Unng Dhng Dhng Counter Dhng Counter	Table #: ¥10 Check #: 107 Status: Decup Customer: Party Size: 1 Server: Manac Check Total: \$15.37	11.16 11.15 10.00 10.00 10.00 10 10 10 10 10 10 10 10 10 10 10 10 1		Seal #1 Food Selami prod	51 51 51 51 51 51	4.50 4.50 12.50 () 51.00 () Manare Manare
	Open	107	Dinng	List Time: Seated Time: 11:32: Open Time: 11:32: Print Time: 11:32: Close Time: Occupied Min: 23:25	05 am 05 am 22 am		- 880 B		

3. Press the Float Full On/Off button again to remove the check detail from the screen.

8.3.6 Group By (copy)

You may find a closed check you are looking for by pressing the **Group By** button and all orders will be sorted by the user ID under which the check was started. **Note:** By default all closed orders are sorted by Order #.

Group By

1. Press the **Group By** button at the bottom of the screen.



2. Choose the way you would like the orders grouped.



- 3. Press on the small + sign next to the grouping of checks you want to view and the group will expand.
- 4. You can now select the check you need.

					200720000000000						1222			
SoftTou	ch POS	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	1
6/17 03:06p	Cassandra					-					(4)			
All Checks	Open Checks	Closed C	hecks	Future Checks	Offline Ch	ecks Op	en Tips						~	
-					1									
120000000					Unly Only	the last 50	checks are di	splayed at or	ne time, the	check # wi	II duplicate for	each additio	nal payment	made.
Owner	<u>Δ</u>										Name	т	Cast No.	
Status I	Check # 🔺 Ch	eck Type S	eating #	Sub Total Del	ivery Round	ling Tax	Gratuity	Tip Total	Total a	Account	#16 - Gue	est: 1	1 Seat	at /
	iai tenuei										Seat #1		\$9.00	
Closed	101 Ba	r 10		\$9.00	\$	0.00 \$6).54 \$0.00	\$0.00	\$9.54 (Cash	Liquor		\$9.00	
Closed	1 02 Ba	r		\$0.00	\$	0.00 \$0).00 \$0.00	\$0.00	\$0.00		1 Well Vodk: 1 Well Ceets	a Bartende	\$3.00	*
Owner : C	assandra										1 Well Scott	:0	\$3.00 [\$3.00 [₽ □
											and the state of the		20100	S
											#101	9	69.54	
											🕐 UI		Down	
•														Þ
	Find	E E	ind	Perent	Eloat C	heck	Float Full	Group		Filter	RePrint	Find	Past	
0	Check #	Cust	omer	Checks	On/C	Off	On/Off	By	Che	eck Type	Check	Che	ck #	
and and	B - O	Î .				-						1554		
	Check	Ch	ecks											
	-													

8.3.7 Filter Check Type

You may find the closed check you are looking for by pressing the **Filter Check Type** button and selecting just a particular order type. This will limit the orders on screen to just that check type, making it easier to find the desired check.

Note: By default all closed orders are sorted by Order #.

Filter Check Type

1. Press the **Filter Check Type** button at the bottom of the screen.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

2. Choose which Check Type you would like to Filter.



- 2. Press on the small + sign next to the owner (employee) whose checks you want to view and the group will expand.
- 3. You can now select the check you need and select the action desired from the buttons below.

Find Check #	Find Customer	Recent Checks	Float Check On/Off	Float Full On/Off	Group By	Filter Check Type	RePrint Check	Find Past Check #
ReOpen Check	Refresh Checks							

8.3.8 RePrint Check (copy)

The **RePrint Check** button allows to re-print the closed check. It will show DUPLICATE on the top of the check.

RePrint Check

- 1. Select the check you want to re-print.
- 2. Press the **RePrint Check** button.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

8.3.9 Find Past Check

This button allows you to bring up checks from previous operation dates.

1. Press the Find Past Check # button at the bottom of the screen.

Find	Find	Recent	Float Check	Float Full	Group	Filter	RePrint	Find Past
Check #	Customer	Checks	On/Off	On/Off	By	Check Type	Check	Check #
ReOpen Check	Refresh Checks							

2. Choose the date for the check you are searching and press ENTER.

Today	06/14/	2011	BK	Clear	Select operation date	
Now	12:00AN	1	ВК	Clear	■ June, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri S 29 30 31 1 2 3	Sat 4
15 min	2 Days	4	5	6	5 6 7 8 9 10	11
30 min	3 Days	1	2	3	$\begin{array}{c ccccccccccccccccccccccccccccccccccc$	25
45 min	4 Days	0	AM	PM	26 27 28 29 30 1 3 4 5 6 7 8	2 9
60 min	5 Days	CANCE		NTER	OToday: 6/19/2011	

3. Enter the check number you want to view and it will display on screen.

8.3.10 Adjust Payments

*** NO LONGER HERE

This button allows you to adjust a payment on a closed check.

You do this by touching the tender as shown below.

	Tenders
Cash Amt:\$11.35	Tip: \$0.00
K	

Next, choose wether you want to Remove Tender or Clear Tenders.



You will then need to confirm you decision.



Now, simply put in the new tender and press ENTER.

8.3.11 ReOpen Check

The **ReOpen Check** button is used for re-opening a check that was closed by mistake.

ReOpen Check

- 1. Highlight the check you want to re-open.
- 2. Press the **ReOpen Check** button.

Find Check #	Find Customer	Recent Checks	Float Check On/Off	Float Full On/Off	Group By	Filter Check Type	RePrint Check	Find Past Check #	
ReOpen Check	Refresh Checks								

3. You will be given the option to Reopen the check or Reopen the check and void the payment off at the same time.

_	Select reopen option
M	Pick a button option
	Reopen Check
	Reopen & Void Payment(s)
	Cancel

3. A warning will be displayed. Press Ok.



- 4. You will then be asked if you are sure you want to re-open this check. Press **YES**.
- 5. Press **Ok** to the information dialog.

The check is now re-opened under the mode it was originally started. **For example:** If the check was initially opened under Dining mode, that is where you will find this check.

8.4 Future Orders

The Future Orders section allows a manager to view all future orders in the system.

Enter the Future Orders tab

- 1. Press the **Manager** icon at the top of your screen.
- 2. Press the All Checks Overview icon on the left.



3. Press Future Orders tab at the top of the screen.

8.4.1 Float Check On/Off (copy)

This button allows you to show or hide the actual check on the screen while still working in the **Overview** section.

- 1. Highlight the check you wish to look at.
- 2. Press the Float Check On/Off button at the bottom of the screen.

Float Check	Float Full	Group	Filter	Void	Void	Refresh
On/Off	On/Off	By	Check Type	Order	Waste	Checks

You will see the check detail for the selected check.

Status + Owner :	Hidden Amy D.	Check #	Check Date Time	Scheduled For	Check	Type Sub Total Tax Name: TRACY Seat #Island 2 - Guest: 1	Total Nest Seat
- Owner	Becky					Seat ≠1	\$33.05
Open		158	06/01 01:17pm		Bar	Liquor 1 Amstel Light	\$8.75 \$3.75
Open		136	06/01 12:44pm		Bar	1 Jack Daniels	\$4.50 ^{.03}
Open	Yes	127	06/01 12:32pm		Bar	Straight Up 10.50	\$0.50.70
Open	Yes	101	06/01 11:02am		Bar	Food	\$24.30 1
• Owner	: Jenn D					1 Aptz Fish Dip Appetizer First	\$7.50
Owner :	Lorie R					2 French Dip	\$15.90
Owner	: Lorraine					Fries SIDE HORSEY AND	
+ Owner :	Nancy					Xtra Dressing	\$0.60
						SIDE H.MUST.	_
						Atra Dressine	50-30
						#158 \$35.	03
						📣 Up 🛛 🤳 D	lown

3. Press the Float Check On/Off button again to remove the check detail from the screen.

8.4.2 Float Full On/Off

This button allows you to show or hide a detailed view of the actual check on the screen while still working in the **Ovedrview** section.

- 1. Highlight the check you wish to look at
- 2. Press the Float Full On/Off button at the bottom of the screen



You will see the check detail for the selected check as well as check stats.

Discod	LINEUK #	Check Type	CLOSE WINDOW	an in		#V10 - Guest:	Seat	Constant and
Closed Closed Closed Closed Closed Closed	100 101 102 103 104 105	Unng Dhng Dhng Chng Counter Dhng	Table #: V10 Check #: 107 Status: Docupie Customer: Porty Size: 1 Server: Manage Check Total: \$15.37	a 10.06 10.06 10.00 10.00 10.00		Seat ¥1 Food Medium Pizza Salami	\$14 \$14 \$12 \$12 \$1	.50 m .50 .50 F .00 m e .00 m e
Closed	106	Counter	Course:					Manager
			Seated Time: 11:32:0: Open Time: 11:32:0: Print Time: 11:32:2: Close Time: Occupied Min: 23:25	5 am 5 am 2 am				
			Actual/Target: (\$453.7	9) / \$468.2!	9	#107	\$15.3	17

3. Press the **Float Full On/Off** button again to remove the check detail from the screen.

8.4.3 Group By (copy)

You may find the check you are looking for by pressing the **Group By** button and all orders will be sorted by the user ID under which the check was started. **Note:** By default all closed orders are sorted by Order #.

Group By

1. Press the **Group By** button at the bottom of the screen.



2. Choose the way you would like the orders grouped.



- 3. Press on the small + sign next to the grouping of checks you want to view and the group will expand.
- 4. You can now select the check you need.

8.4.4 Filter Check Type

You may find the check you are looking for by pressing the **Filter Check Type** button and selecting just a particular order type. This will limit the orders on screen to just that check type, making it easier to find the desired check.

Note: By default all orders are sorted by Order #.

Filter Check Type

1. Press the **Filter Check Type** button at the bottom of the screen.



2. Choose which Check Type you would like to Filter.



3. You can now select the check you need.

8.4.5 Void Order (copy)

This button allows you to void an order that was not made or poured. You will be given an opportunity to indicate why the order was voided from a picklist.

Void Reasons		
Void Reason List		
Customer changed mind	^	
Didn't like food		
Food prepared wrong		
Food was cold		
Other		
Out of item		
Server rang wrong item	~	
Cancel		

8.4.6 Void Waste (copy)

This button allows you to void an order that was made or poured. You will be given an opportunity to indicate why the order was voided from a picklist.

Void Reasons	
Void Reason List	
Customer changed mind	^
Didn't like food	
Food prepared wrong	
Food was cold	
Other	
Out of item	-
Server rang wrong item	
	~
Cancel	

8.5 Offline Checks

Enter topic text here.

8.6 Open Tips

The Open Tips section allows a manager to view all open tips in the system.

Enter the Open Tips tab

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press All Checks Overview icon on the left.

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
)	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts	

3. Press the **Open Tips** tab.



8.6.1 Float Check On/Off

This button allows you to show or hide the actual check on the screen while still working in the **Open Tips** section.

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the All Checks Overview icon on the left.
- 3. Press the **Open Tips** tab.
- 4. Highlight the check you wish to see
- 5. Press the Float Check On/Off button at the bottom of the screen.



You will see the check detail on the screen.

6. Press the **Float Check On/Off** button again to remove the check detail from the screen.

8.6.2 Clear Tips

If a server went home and forgot to close out their opened charge tips, you should close them for the server otherwise all the open tips will be cleared on Z.

Clear Tips

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the **All Checks Overview** icon on the left.
- 3. Press the **Open Tips** tab.
- 4. Press the **Clear All Tips** button to clear all tips that are still open.



5. If you are sure, press Yes when prompted by the confirmation dialog box.



8.6.3 RePrint Check (copy)

The **RePrint Check** button allows to re-print the closed check. It will show DUPLICATE on the top of the check.

RePrint Check

- 1. Press the **Manager** icon at the top of the screen.
- 2. Press the All Checks Overview icon on the left.
- 3. Press the **Open Tips** tab.
- 4. Select the check you want to re-print.
- 5. Press the **RePrint Check** button.



Part

Banks (Tills/Pockets)

Part 9 Banks (Tills/Pockets)

9.1 Local Tills

Enter topic text here.

9.1.1 Paid In

The Paid In function allows you to pay money into the till (on any terminal with a till) without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In to Local Till Procedure

From the workstation you are putting the money into:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	's											

 Press the Banks (Tills & Pockets) Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

199

General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
Reports	Web/Internet
Print reports	Internet web browser
All Checks Overview	Tip Pools
Find, reopen, reprint, adjust payments, offline, voids	Tip pool close out
Journal	Yime Editor
Daily transactional journal	Time clock editor, tip fund editor & clocked in employees
Banks (Tills/Pockets)	Employee Management
Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Shifts, Open Time Clocks
Bank & Employee Close out	Z Out
Employees and banks awaiting close out	Z out system wizard
Charge Tip Verification Verify employee declared credit card tips	
Customers & Loyalty Customers and loyalty maintenance	
Accounts House accounts, gift card and card account management	

3. The screen will default to the Local Tills area. Highlight the till you are taking the money from and press the **Paid In** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. You will be prompted to choose the payment type.

		Payment Types	
Pay	ment Type List		
cash	Cash		
VISA	Visa		
	Mastercard		
AMERICAN BURKAM	Amex		
(ANG AN) States	Discover		
	Diners/ Carte Bl		
		Cancel	∲ €

- 5. Enter the amount of a Paid In.
- 6. Press Yes to the confirmation dialog.



9.1.2 Paid Out

The Paid Out function allows you to pay money out of the till (on any terminal with a till) without deducting from sales. The system will ask you for reason codes and you can print a report with the

reasons.

Paid Out is used when you need to remove money from a till to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From the workstation you are taking the money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

	General Functions		Alerts
	Set Op date, change employee, iddnor backonice, system reset	-	System diertrichlagement
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	1	Tip Pools Tip pool close out
	Journal Daily transactional journal	0	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	3	Employee Management Employee Shifts, Open Time Clocks
5	Bank & Employee Close out Employees and banks awaiting close out	Z	Z Out Z out system wizard
<u>₽</u>	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		



3. The screen will default to the Local Tills area. Highlight the till you are taking the money from and press the **Paid Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. Select the reason money is being removed from the till.

	Cash Paid	
Cash	Paid List	
Paid OUT	Driver Paid	ŕ
Paid OUT	Driver Tips Paid	
Paid OUT	Paid Out	E
Paid OUT	Tips Paid	
		-
	Cancel	€ €

- 5. Enter the amount of the Paid Out.
- 6. Press Yes to the confirmation dialog.

 Confirm	ation Dialog	
Paid OU Ti Pa	T: (\$75.00 ill #1 id Out) ?
<u>Y</u> es	No	

9.1.3 Refund Order

You will use the **Refund Order** button when you have a copy of the guest check and want to refund each item and reverse the transaction rather than just entering in a total refund amount as you would with **General Refund**.

Refund Order Procedure

From the workstation you are refunding the money from:

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliv	ery Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	t Alerts!								
Today's Special	's											

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

×	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
-)	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
•)	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. The screen will default to the Local Tills area. Highlight the till you are taking the money from and press the **Refund Order** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. Select the order type that the check being refunded was originally rung up under.



5. Select the date that the check being refunded was originally rung up on.

Today	07/05/	2011	ВК	Clear	Enter original check date/time	
Now	05:28PM	1	ВК	Clear	■ July, 2011	
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 3	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		NTER	Today: 7/5/2011	

6. You will be brought to the ordering screen. From here, enter everything that is on the original ticket just as it was originally rung up. Notice the () around the price of each item and the totals. You are ringing up a negative amount on this check to reflect the refund. When you have entered all items on the original check, press the **Refund Tender** button at the bottom of the screen.



7. Select whether you are refunding cash or applying a refund to a credit card.



8. Select the reason this transaction is being refunded from the list.

Refund Reasons	
Refund Reason List	
Customer changed mind	
Didn't like food	
Food prepared wrong	ш
Food was cold	
Other	
Out of item	
Server rang wrong item	5
Server training	
	*
Cancel	

9. If you selected Credit in step 7, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 7, you will be prompted with a verification screen.

9.1.4 General Refund

You will use the **General Refund** button when you do not have a copy of the guest check and want to refund a general amount.

General Refund Procedure

From the workstation you are refunding the money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

/07 06:35p Cass Ger Set C Print Cass	meral Functions Op date, change empl ports treports Checks Overvi , reopen, reprint, adjus	s oyee, launch bac	koffice, system	reset		Alerts System a	alert manar	gement		
Ger SetC Print C Find,	neral Function Op date, change empl ports treports Checks Overvi , reopen, reprint, adjus	S Joyee, launch bac	(office, system	reset	-	Alerts System a	alert mana	gement		
Rep Print All Find,	ports treports Checks Overvi , reopen, reprint, adjus									
All Find,	Checks Overvi , reopen, reprint, adjus				0	Web/II Internet v	n ternet veb browse	er		
Jou		ew st payments, offline), voids		*	Tip Po Tip pool	close out			
Daily	urnal y transactional journal				9	Time I Time clo	Editor ck editor, t	p fund edito	r & clocked in employe	es
Bar Paid	nks (Tills/Pock) I IN/OUT, refunds, \$ tra	ets) ansfers, driver bar	ks and balanc	es	*	Employe	yee Ma e Shifts, O	pen Time C	ent locks	
Bar Emp	nk & Employee ployees and banks aw	Close out			Z	Z Out Z out sys	tem wizarc	E.		
Cha Verify	arge Tip Verific fy employee declared	credit card tips								
Cus Custo	stomers & Loy tomers and loyalty ma	alty intenance								
Acc Hous	counts se accounts, gift card	and card account	management							

3. The screen will default to the Local Tills area. Highlight the till you are taking the money from and press the **General Refund** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. Enter the total amount that you are refunding (including the tax).
| Enter refund amount | | | | | | | |
|---------------------|-----|-------|-------|--|--|--|--|
| 1 | | ВК | Clear | | | | |
| 7 | 8 | 9 | Off | | | | |
| 4 | 5 | 6 | - | | | | |
| 1 | 2 | 3 | 1 | | | | |
| 0 | | 00.00 | | | | | |
| CAN | CEL | EN | TER | | | | |

5. Select whether you are refunding cash or applying a refund to a credit card.



6. Select the reason for the refund from the list.

Refund Reasons
Refund Reason List
Customer changed mind
Didn't like food
Food prepared wrong
Food was cold
Dther
Dut of item
Server rang wrong item
Server training
Cancel

- 7. If you selected Credit in step 5, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 5, you will be prompted with a verification screen.
- 9.1.5 Transfer from Store

You will use the **Transfer from Store** button when you want to transfer money from the default store safe to a till, pocket or another store safe.

Transfer from Store Procedure

From the workstation you are transferring money to:

1. Press the Manager icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

5	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
F	Reports Print reports	Web/Internet Internet web browser
F	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
) î	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
) E	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
) (Charge Tip Verification	
	Customers & Loyalty Customers and loyalty maintenance	
) +	Accounts House accounts, gift card and card account management	

3. The screen will default to the Local Tills area. Highlight the till you are putting money in and press the **Transfer from Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. Enter the amount you are transferring from the store to this till.

Enter transfer amount						
1		вк	Clear			
7	8	9	Off			
4	5	6	-			
1	2	3				
0	·	00.00				
CAN	CEL	ENT	TER			

5. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.



9.1.6 Transfer to Store

You will use the **Transfer to Store** button when you want to transfer money from a till, pocket or another store safe to the default store safe.

Transfer to Store Procedure

From the workstation you are transferring money to:

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1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.



3. The screen will default to the Local Tills area. Highlight the till you are taking the money from and press the **Transfer to Store** button.



4. Enter the amount you are transferring from the till to the default store safe.

Enter transfer amount							
1		ВК	Clear				
7	8	9	Off				
4	5	6	-				
1	2	3					
0		00.00					
CAN	CEL	ENT	TER				

5. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.

9.1.7 Transfer To...

You will use the **Transfer To...** button when you want to transfer money from one till, pocket or store safe to another till, pocket or store safe.

Transfer To... Procedure

From the workstation you are transferring money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

SoftTou	ch POS Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
6/07 06:35p	o Cassandra		U					(d)				
*	General Funct Set Op date, change	ions employee, lau	nch backoffi	ce, system	reset		Alert: System	s alert mana	gement			
	Reports Print reports						Web/	Internet web brows	er			
9	All Checks Ove Find, reopen, reprint	erview adjust paymen	its, offline, ∨o	iids		*	Tip P Tip poo	ools ol close out				
«	Journal Daily transactional joi	urnal				9	Time Time cl	Editor ock editor, t	ip fund edito	or & clocked	in employ	Bes
	Banks (Tills/Po Paid IN/OUT, refunds	ockets) s, \$ transfers, dr	river banks a	and balance	s	33	Empl Employ	oyee Ma /ee Shifts, C	anagem Ipen Time C	ent Nocks		
83	Bank & Employ Employees and bank	yee Close (s awaiting close	out se out			Z	Z Out Z out sy	t /stem wizard	ł			
	Charge Tip Ve Verify employee dec	rification lared credit ca	rd tips									
۲	Customers & L Customers and loyalt	. oyalty y maintenance										
đ	Accounts House accounts, gift (card and card	account mar	nagement								

3. The screen will default to the Local Tills area. Highlight the till you are taking the money from and press the **Transfer To...** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. Select the Bank (till, pocket or safe) that you are transferring money to from the Bank List.

	Bank List	
Transfer ba		
Iransfer to	Davasita	Durb d
Depository Deploy Deckot	Depository	
Dealer Pucket		\$0.00
Safe		\$0.00
SelfPay Drawer		\$0.00
Server Pocket		\$0.00
Station 1 Drawer AM		\$0.00
Station 1 Drawer PM		\$0.00
Cassi Eubank Pocket	Pocket	\$0.00
	Consel	
	Cancer	ノマ

5. Enter the amount you are transferring from the till to the Bank (till, pocket or safe).

Enter transfer amount							
1		вк	Clear				
7	8	9	Off				
4	5	6	-				
1	2	3	/				
0	·	00.00					
CAN	CEL	ENT	TER				

- 6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.
- 7. Take the money from the till selected in step 3 and put it in the Bank (Till, Pocket or Store Safe) you selected in step 4.

9.1.8 Close Out

You will use the **Close Out** button when you want to close out and count a till or pocket. Usually the till or pocket will be closed by the employee that was assigned to this till or pocket when they end their shift. If their shift was closed without the till being closed, or if you wish to assign a fresh till or get fresh pocket totals, you have the ability to close a till or pocket with this procedure.

Close Out Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts	

3. The screen will default to the Local Tills area. Highlight the till you are closing out and press the **Close Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. From the Close Out Checklist screen, press the **Close out bank** button on the right.



5. The screen will display the amount expected and default to that amount being the amount of cash counted for this till, pocket or store safe if you do not have Blind Drop selected in BackOffice set up. If the amount is correct, press Process to finalize the Close Out.

If the amount is not the same as the amount expected, press the <- Change \$ button.

Till/Pocket Clo	oseout	
<u>Till #1</u>		
Total "Cash" amount you should have:	\$140.00	
Enter "Cash" amount you actually have:	\$140.00	<- Change \$
Actual 'Cash" drop amount:	\$140.00	
Over / Under ?		
Over/Under \$0.00		
Over/Under Reason:		
		1
Process	Cancel	
		W.

6. Enter the actual amount of money in the till, pocket or store safe in the Enter new drop amount dialog box that becomes available.



7. If the actual amount entered and the expected amount are different, you will see the difference in the Over / Under section of the Till/Pocket Close Out dialog box. If you wish to select the reason for the discrepancy, press the reason button and select the reason from the Over / Under Reasons list.



8. You will now see the Over / Under amount and the reason in the Over / Under section of the Till/Pocket Close Out screen. Now press the Process button at the bottom to finalize.



9. Now press the Process button at the bottom to finalize.

9.1.9 Bank Report

This allows you to take a report on any till, pocket or store safe.

Bank Report Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	-
6/13 04:16p Cassandra		U			En					(4)			
Warnings & Reminders	ChalkBoard	Specials	Self Pay Ca	ashout	Alerts!								B.common
Today's Special	'5		-	1	1.1.1								

2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

50ftTouc 5/07 06:35p	Ch POS Calc Drawer History Info Counter Cassandra	Pick Up Bar Dining Employee Manager
2	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
<	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
œ₽	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
a	Accounts House accounts, gift card and card account management	
Jun)		

3. The screen will default to the Local Tills area. Highlight the till you are closing out and press the **Bank Report** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

4. A Daily Batch List will appear. A batch is any period the till was open and closed. You may use the till more than once per day and you would have multiple batches. Each batch will indicate what date and time it was opened and closed and list it's status as Open or Closed. This will enable you to select the report that corresponds with correct shift that the till was used during. If you only use each till once per day, you will only see one batch.

Select the batch that you wish to run a report on.

	Daily Batches	
Batch List		
Shift Date Time	Status	
07/05 05:26pm -	Open	
	Cancel	ۍ 🗲

5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done	Print	Print Dialog	Zoom In	Zoom Out	View 100%	
------	-------	-----------------	------------	-------------	--------------	--

SAMPLE BANK REPORT

```
Bank Close Out Report
Date Time: 7/8/2011 5:22:50 PM
Till #2
Operation Date: 7/8/2011
Shift: 5:18:50 PM -
CASH
-------
Gross Cash Collected
                       $164.30
                   _____
                       $164.30 A
TOTAL CASH
CREDIT CARDS
----- B
                       $28.33
1
    Amex
2
                       $134.30
   Mastercard
1
   Visa
                       $33.62
                   -----
  TOTAL CREDIT CARDS
                      $196.25 C
4
    TOTAL PAID IN CREDIT
   TOTAL PAID IN
                        $0.00 D
0
    TOTAL PAID OUT CREDIT
0
    TOTAL PAID OUT
                        $0.00 E
                        $0.00 F
0
    NET PAID IN/OUT
USED BY & TIPS PAID
----- G
Bartender, Bart TIPS: $32.00 I
TIPS PAID: $0.00 TIPS OWED: $32.00 K
BANK CASH SUMMARY
+ CASH IN DRAWER
                       $164.30 L
                        $0.00 M
- TIPS PAID FROM DROP
                   ...........
= TOTAL CASH TO DROP
                       $164.30 N
```

*** Manager Copy ***

Employee Close Out Report Date Time: 7/8/2011 5:28:37 PM Bartender, Bart Job: Bartender Operation Date: 7/8/2011 Shift: 5:16:28 PM -

TOTAL	SALES		0
=====			~
62	Food	\$236.00	
24	Liquor	\$81.00	
86	TOTAL SALES	\$317.00	P
ADJUS	TMENTS		0
			Y
1	10% Discount	(\$2.55)	
1	Item Comp	(\$4.50)	
2	TOTAL ADJUSTMENTS	(\$7.05)	R

Bank Report before a Close Out

This is an example of a bank report taken before the employee who worked the till closed their shift and before the till itself was closed out. Remember, with true cash management, the employee report will reflect the sales, voids, adjustments that the employee performs while the till report will tell you information about the money in the drawer.

A – Total Cash Your Total Cash is Gross Cash Collected, and the Net Paid In/Out. (If you Paid In \$50 from the vending machine and Paid Out \$10 for produce, your Net Paid In/Out would be \$40).

B – Credit Cards
This section will give you a count of and a total for each credit card tendered.

C- Total Credit Cards This will give you a count of and a total for all credit cards tendered.

D – Paid In's This will section will break out Cash Paid In and Credit Cards Paid In, then give you a total of all Paid In's.

E – Paid Out's This will section will break out Cash Paid Out and Credit Cards Paid Out, then give you a total of all Paid Out's.

F – Net Paid In/Out

This is the difference between the Paid In and Paid Out totals.

G - The Used By & Tips Paid section will give you information for each employee who used this till.

H – This is the name of the first (sometimes only) employee that has used the till.

I – This is the amount of Charge Tips added to the checks of the employee named on the left.

J – This is the amount of Tips Paid to the employee (the employee shift and the bank have not been closed or the tips paid would be populated in most scenarios set up when programming BackOffice).

K – This is the amount of Charge Tips still owed to the employee indicated.

L – Cash in Drawer total

M – Once you close a till, the "cash in drawer" will be dropped to your safe. This figure is the total of Charged Tips that are being paid out from the cash in drawer before the money is dropped to the safe.

N – The amount of cash left after the tips that were paid out. This is the amount of Cash that will be transferred to or dropped to the default store safe that was indicated when programming Back Office.

Employee Report

We have BackOffice set to print the employee report for any employee who has rung on this till.

O – This is the total sales generated by the employee named in this report. You will get a count and dollar amount of each of the super departments.

P – This is a total of all sales.

Q – This is the total of adjustments generated by the employee named in this report. You will get a count and dollar amount for each adjustment.

R – This is a total of all adjustments.

S – These are the void item and void waste totals for this employee.

T – This is a total of all Charged Tips for this employee

U – This will show you and credit card deductions you have set up in BackOffice under the Media/Accounts applet.

V – If this employee owes any tips that have been set up under tip dispersions, it will appear here.

W – If this employee has earned any tips that have been set up under tip dispersions, it will appear here.

X - If this employee owes any tips that have been set up under tip pools, it will appear here.

Y – If this employee has earned any tips that have been set up under tip pools, it will appear here.

Z – Net Charge Tips is a total of all tips earned less tips due from this employee because of tip dispersions or tip pools.

AA – Total gratuity earned by this employee. If there was a party of 6 or more and a gratuity was added to one of this employee's checks, it would show here, as a gratuity, rather than a tip. This allows a restaurant to keep track of these totals independently.

BB – If this employee earned any portion of the delivery charge on orders that they delivered, it would show here, as Delivery Earnings, rather than a tip. This allows a restaurant to keep track of these totals independently.

CC – This is a total sum after all "tips earned" and "tips owed" are calculated.

DD – This is the amount of Cash Tips declared by this employee.

EE – The Net Minimum Cash Tips will tell you if the net total of this employee's charge tips and the cash tips declared meet the minimum requirements that tipped employees must declare. For example, if tipped employees must declare 10% of their sale as tips, and their sales for the night are \$1,000, they need to report \$100 in tips. If credit card tips are under \$100, not meetin the 10% requirement, they will need to report the difference as cash tips. If this figure is less than the percent set up in BackOffice it will look like this: (\$23.71). If it satisfies the requirements set up in BackOffice, there will be no () around the number.

FF – Tracking Groups can be a Super Department, a Department, a Family Group or a Menu Item. You may have a multitude o tracking groups and you can have different tracking groups for different employees and employee groups. You will see a coun the tracking type (Super Department, Department, Family or Menu Item)

9.2 All Tills

Enter topic text here.

9.2.1 Paid In

The Paid In function allows you to pay money into the till (on any terminal with a till) without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In to All Tills Procedure

From the workstation you are putting the money into:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

/07 06:35p				HIStory	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
	Cassandra								(H)				
i s	General F Set Op date, cł	unction hange emp	IS bloyee, laun	ich backoffic	ce, system	reset		Alerts System	s alert mana	gement			
F	Reports Print reports							Web/I Internet	nternet web brows	er			
2	All Checks Find, reopen, re	s Overv eprint adju	iew st payment	s, offline, vo	ids			Tip P Tip poo	ools I close out				
🧼 č	Journal Daily transactio	onal journa	l.					Time Time clo	Editor	ip fund edito	or & clocked	in employee	'S
	B anks (Til Paid IN/OUT, r	Is/Pock efunds, \$ tr	(ets) ansfers, dri	ver banks a	nd balanc	es	*	Employ Employ	oyee Ma ee Shifts, C	anagem Ipen Time C	ent locks		
<u>3</u>	Bank & Er Employees an	nploye d banks av	e Close waiting clos	out e out			Z	Z Out Z out sy	stem wizarı	Ŀ			
	Charge Ti Verify employe	p Verifi ee declared	cation d credit care	dtips									
e c	Customers Customers and	s & Loy I loyalty ma	alty aintenance										
J F	Accounts House accoun	ts, gift card	and card a	ccount man	agement								

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

- 4. Highlight the till you are adding the money to and press the **Paid In** button.
- 5. You will be prompted to choose the payment type.

	Payment Types
Pay	nent Type List
cash	Cash
VISA	Visa
	Mastercard
CMIERCIA Escherti	Amex
AND	Discover
9	Diners/ Carte Bl
_	Cancel 2

- 6. Enter the amount of a Paid In.
- 7. Press Yes to the confirmation dialog.



9.2.2 Paid Out

The Paid Out function allows you to pay money out of the till (on any terminal with a till) without deducting from sales. The system will ask you for reason codes and you can print a report with the reasons.

Paid Out is used when you need to remove money from a till to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From the workstation you are taking the money from:

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Ca	ashout	Alerts!								
Today's Special	'5	18	10		1.1								

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids		Tip Pools Tip pool close out
-)	Journal Daily transactional journal	2	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
3	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
<u></u>	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
])	Accounts House accounts, gift card and card account management		

3. Press the **All Tills** tab at the top of the screen.

Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Paid Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the reason money is being removed from the till.

Cash Paid	
Cash Paid List	
Paid OUT Driver Paid	Î
Paid OUT Driver Tips Paid	
Paid OUT Paid Out	III
Paid OUT Tips Paid	
	•
Cancel	Ç

6. Enter the amount of the Paid Out.

7. Press Yes to the confirmation dialog.



9.2.3 Refund Order

You will use the **Refund Order** button when you have a copy of the guest check and want to refund each item and reverse the transaction rather than just entering in a total refund amount as you would with **General Refund**.

Refund Order Procedure

From the workstation you are refunding the money from:

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
4	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
5	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Refund Order** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the order type that the check being refunded was originally rung up under.



6. Select the date that the check being refunded was originally rung up on.

1000				(F	Enter aviainal about data time	
Today	07/05/	2011	BK	Clear	Enter original check date/time	
Now	05:28PN	1	ВК	Clear	■ July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		ENTER	Today: 7/5/2011	

7. You will be brought to the ordering screen. From here, enter everything that is on the original ticket just as it was originally rung up. Notice the () around the price of each item and the totals. You are ringing up a negative amount on this check to reflect the refund. When you have entered all items on the original check, press the **Refund Tender** button at the bottom of the screen.

SoftTouch POS 7/05 05:30p Cassandra	History Info Deli	very Dispatch Counte	r Take Out Pick Up	Bar Dining E	mployee Mana	ger
# - Guest: 1 Seat 1 Next Seat Seat #1 (\$10.75) Food (\$10.75)	1 2 3 Food Menu	4 5 6	789	0 C <u>C</u>	Breakfast Pizza	Hot Subs Sides
Starters 1 Minestrone 1 Chicken Caesar Salad (\$3.50) NEW (\$7.25) NEW	Breakfast	Pizza	Burgers	Salads	Burgers Salads	Beverages Desserts
	Appetizers	Soups	Pasta	Steaks	Appetizers Soups	Liquor Menu Pool Table
	Chicken and Veal	Seafood	Wings	Cold Subs	Pasta Steaks	Pool-Table Re-Rental Cue Rentals
	Hot Subs	Sides	Beverages	Desserts	Chicken and ¥eal Seafood	
#100 (\$11.40)	Liquor Menu	Pool Table	Pool-Table Re-Rental	Cue Rentals	Wings Cold Subs	
Home Go	Dn Cancel	Change Menu DateTime	Clear Order M	lan. Item Scan	Change Gratuity	

8. Select whether you are refunding cash or applying a refund to a credit card.



9. Select the reason this transaction is being refunded from the list.

Refund Reasons
Pafund Reason List
Customer changed mind
Didn't like food
Food prepared wrong
Food was cold
Other
Out of item
Server rang wrong item
Server training
Cancel $2 + 5$

10. If you selected Credit in step 8, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 8, you will be prompted with a verification screen.

9.2.4 General Refund

You will use the **General Refund** button when you do not have a copy of the guest check and want to refund a general amount.

General Refund Procedure

From the workstation you are refunding the money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids		Tip Pools Tip pool close out
E	Journal Daily transactional journal	9	Time Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **General Refund** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the total amount that you are refunding (including the tax).



6. Select whether you are refunding cash or applying a refund to a credit card.



 Select the reason for the refund from 	m the list.	
	Refund Reasons	
Refund Reason List		
Customer changed mind		<u>^</u>
Didn't like food		
Food prepared wrong		E .
Food was cold		
Other		
Out of item		
Server rang wrong item		
Server training		
	Cancel	∱ ∳

8. If you selected Credit in step 6, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 6, you will be prompted with a verification screen.

9.2.5 Transfer from Store

You will use the **Transfer from Store** button when you want to transfer money from the default store safe to a till, pocket or another store safe.

Transfer from Store Procedure

From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deli	Very Dispa	Atch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashou	It Alerts!								
Today's Special	5											

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

Soferour	b DOS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
/07 06:35p	Cassandra					1				22			
Ŭ.	General F Set Op date, c	unction change em	ns ployee, lau	nch backoffi	ce, system	ı reset	8	Alert System	<mark>S</mark> alert mana	gement			
	Reports Print reports							Web/	Internet web brows	er			
2	All Check Find, reopen, I	s Overv reprint adji	r iew ustpaymen	ts, offline, vo	iids		*	Tip P Tip poo	ools ol close out				
	Journal Daily transactional journal					Yime Editor Time clock editor, tip fund editor & clocked in employees							
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances					Employee Management Employee Shifts, Open Time Clocks							
3	Bank & E Employees ar	mploye nd banks a	e Close waiting clos	out se out			Z	Z Out Z out sy	t /stem wizar/	н			
æ	Charge Ti Verify employ	ip Verif i ee declare	i cation ed credit car	rd tips									
	Customer Customers an	r s & Lo y d loyalty m	yalty naintenance										
1	Accounts House accour	i nts, gift care	d and card (account mar	nagement					>			

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are putting money in and press the **Transfer from Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the amount you are transferring from the store to this till.



6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.



9.2.6 Transfer to Store

You will use the **Transfer to Store** button when you want to transfer money from a till, pocket or another store safe to the default store safe.

Transfer to Store Procedure
From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay (Cashout	Alerts!								
Today's Specia	ls	1. E. S	1		1.12 14.								

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset	Alerts System alert management
	Reports Print reports	Web/Internet Internet web browser
.)	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
3)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
<u>A</u>	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1)	Accounts House accounts, gift card and card account management	

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Transfer to Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the amount you are transferring from the till to the default store safe.



6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.

9.2.7 Transfer To...

You will use the **Transfer To...** button when you want to transfer money from one till, pocket or store safe to another till, pocket or store safe.

Transfer To... Procedure

From the workstation you are transferring money from:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deli	Very Dispa	atch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Casho	ut Alerts!								
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
1	Customers & Loyalty Customers and loyalty maintenance	
1)	Accounts House accounts, gift card and card account management	

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Transfer To...** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

- **Bank List** Transfer to Depository Depository Cash \$ 🔺 Dealer Pocket \$0.00 \$0.00 Safe SelfPay Drawer \$0.00 Server Pocket \$0.00 Station 1 Drawer AM \$0.00 Station 1 Drawer PM \$0.00 Cassi Eubank Pocket Pocket \$0.00 Cancel
- 5. Select the Bank (till, pocket or safe) that you are transferring money to from the Bank List.

6. Enter the amount you are transferring from the till to the Bank (till, pocket or safe).

Enter trans	fer amount	t	
Ĩ		вк	Clear
7	8	9	Off
4	5	6	-
1	2	3	/
0	·	00	.00
CAN	CEL	EN	TER

7. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.

9.2.8 Close Out

You will use the **Close Out** button when you want to close out and count a till or pocket. Usually the till or pocket will be closed by the employee that was assigned to this till or pocket when they end their shift. If their shift was closed without the till being closed, or if you wish to assign a fresh till or get fresh pocket totals, you have the ability to close a till or pocket with this procedure.

Close Out Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	-
Warnings & Reminders	ChalkBoard	Specials	Self Pay C	ashout	Alerts!						6		
Today's Special	5			100	1.1.1								

ftTouc 7 06:35p	ch POS Cassandra	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
*	General F Set Op date, c	unction hange em	ns ployee, laur	nch backoffi	ce, system	reset	2	Alert System	<mark>S</mark> alert mana	gement			
)	Reports Print reports						•	Web/	Internet web brows	er			
	All Check Find, reopen, r	s Overv eprint adju	r iew ust paymen	ts, offline, ∨c	iids		1	Tip P Tip poo	ools ol close out				
	Journal Daily transacti	onal journe	al				9	Time Time cl	Editor ock editor,	tip fund edito	or & clocked	in employe	es
	Banks (Til Paid IN/OUT, 1	IIS/PocI refunds, \$1	kets) transfers, dr	iver banks a	and balanc	es	*	Empl Employ	oyee M a ree Shifts, C	anagem Open Time C	ent locks		
3	Bank & El Employees ar	mploye Id banks a	e Close waiting clos	out se out			Z	Z Out Z out sy	t rstern wizarı	đ			
<u>A</u>	Charge Ti Verify employe	p Verifi ee declare	i cation ed credit car	rd tips									
	Customer Customers and	s & Loy d loyalty m	alty aintenance										
])	Accounts House accour	nts, gift card	d and card a	account mar	nagement								

3. Press the **All Tills** tab at the top of the screen.

	Store Open banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are closing out and press the **Close Out** button.

Paid	Paid	Refund	General	Transfer from Store	Transfer to Store	Transfer	Close Out	Bank
------	------	--------	---------	------------------------	----------------------	----------	-----------	------

5. From the Close Out Checklist screen, press the **Close out bank** button on the right.

SoftTouch POS	
7/06 06:29p Cassandra	
Closeout Checklist	
Close out bank: Till #1	Required Close out bank

6. The screen will display the amount expected and default to that amount being the amount of cash counted for this till, pocket or store safe if you do not have Blind Drop selected in BackOffice set up. If the amount is correct, press Process to finalize the Close Out.

If the amount is not the same as the amount expected, press the <- Change \$ button.

Till/Pocket Clo	oseout	
<u>Till #1</u>		
Total "Cash" amount you should have:	\$140.00	
Enter "Cash" amount you actually have:	\$140.00	<- Change \$
Actual 'Cash" drop amount:	\$140.00	
Over / Under ?		
Over/Under \$0.00		
Over/Under Reason:		
Process	Cancel]

7. Enter the actual amount of money in the till, pocket or store safe in the Enter new drop amount dialog box that becomes available.



8. If the actual amount entered and the expected amount are different, you will see the difference in the Over / Under section of the Till/Pocket Close Out dialog box. If you wish to select the reason for the discrepancy, press the reason button and select the reason from the Over / Under Reasons list.



9. You will now see the Over / Under amount and the reason in the Over / Under section of the Till/Pocket Close Out screen. Now press the Process button at the bottom to finalize.



10. Now press the Process button at the bottom to finalize.

9.2.9 Bank Report

This allows you to take a report on any till, pocket or store safe.

Bank Report Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Deliver	Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5		-	1.1								

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **All Tills** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	
		 Antidiscretion 			

4. Highlight the till you are closing out and press the **Bank Report** button.

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5. A Daily Batch List will appear. A batch is any period the till was open and closed. You may use the till more than once per day and you would have multiple batches. Each batch will indicate what date and time it was opened and closed and list it's status as Open or Closed. This will enable you to select the report that corresponds with correct shift that the till was used during. If you only use each till once per day, you will only see one batch.

Select the batch that you wish to run a report on.

	Daily Batches	
Batch List		
Shift Date Time	Status	
07/05 05:26pm -	Open	
	Cancel	ۍ 🗲

6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done	Print	Print Dialog	Zoom In	Zoom Out	View 100%	

9.3 Pockets

Enter topic text here.

9.3.1 Paid In

The Paid In function allows you to pay money into a till (on any terminal with a till) or server pocket without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In to a Pocket Procedure

From any workstation. Be sure to give the money to the employee whose pocket you select in step 4.

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	'5											

		~ .	_			- · ·	D . 1 11	_	-				-
SoftTou	h Pos	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
6/07 06:35p	Cassandra			U		-			(4)				
Ž	General F Set Op date, c	unction hange emp	IS bloyee, laur	nch backoffi	ce, system	ı reset	-	Alerts System	5 alert mana	gement			
	Reports Print reports						•	Web/I Internet	nternet web brows	er			
9	All Checks Find, reopen, r	s Overv reprint adju	iew ist payment	s, offline, vo	ids		-	Tip P Tip poo	ools I close out				
«	Journal Daily transacti	onal journa	d				9	Time Time clo	Editor ock editor, 1	tip fund edito	r & clocked	in employee	9S
	Banks (Til Paid IN/OUT, 1	IIS/Pock refunds, \$ tr	(ets) ransfers, dri	ver banks a	und balanc	es	*	Employ	oyee Ma ee Shifts, C	anagem Ipen Time C	ent locks		
隐	Bank & El Employees ar	m ploye nd banks av	e Close waiting clos	out e out			2	Z Out Z out sy	: stem wizaro	Ŀ			
	Charge Ti Verify employe	p Verifi ee declare	cation d credit car	d tips									
•	Customers and	r s & Loy d loyalty ma	alty aintenance										
đ	Accounts House accour	nts, gift card	l and card a	account man	agement								
- Jun C													

3. Press the **Pockets** tab at the top of the screen.

Local Tills All Tills Pockets Sto	re Open Banks	All Banks			
Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are adding the money to and press the **Paid In** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
IN		Urder	Refund	Store	Store	10		керо

5. You will be prompted to choose the payment type.

	Payment Types	
Pay	yment Type List	
cash	Cash	
VISA	Visa	
	Mastercard	
CALLER CON	Amex	
	Discover	
O Alexandra	Diners/ Carte Bl	
	Cancel	ۍ 🗲

- 6. Enter the amount of a Paid In.
- 7. Press Yes to the confirmation dialog.

9.3.2 Paid Out

The Paid Out function allows you to pay money out of the till (on any terminal with a till) without deducting from sales. The system will ask you for reason codes and you can print a report with the reasons.

Paid Out is used when you need to remove money from a till or pocket to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From any workstation. Be sure to get the money from the pocket of the employee that you select in step 4.

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Ca	ashout	Alerts!								
Today's Special	ls	1. E. 1	1	1	1.1								

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	S	Tip Pools Tip pool close out
	Journal Daily transactional journal		Time Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		

3. Press the **Pockets** tab at the top of the screen.

Local Tills					
Bank Name	Туре	Total Cash	Total Other	Total	Status
Till #1	Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Paid Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the reason money is being removed from the till.

	Cash Paid	
() ()		
Cash I	Paid List	
Paid OUT	Driver Paid	Â
Paid OUT	Driver Tips Paid	
Paid OUT	Paid Out	III
Paid OUT	Tips Paid	m -
	Cancel	e e

7. Press Yes to the confirmation dialog.

9.3.3 Refund Order

You will use the **Refund Order** button when you have a copy of the guest check and want to refund each item and reverse the transaction rather than just entering in a total refund amount as you would with **General Refund**.

Refund Order Procedure

From any workstation. Be sure to get the money from the pocket of the employee that you select in step 4.

1. Press the Manager icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
.)	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. Press the **Pockets** tab at the top of the screen.

Tills Pockets	Store Open Banks	All Banks			
	Туре	Total Cash	Total Other	Total	Status
	Till	\$0.00	\$0.00	\$0.00	
		Tills Pockets Store Upen Banks Type Till	Tills Pockets Store Upen Banks All Banks Type Total Cash Till \$0.00	Tills Pockets Store Upen Banks All Banks Type Total Cash Total Other Till \$0.00 \$0.00	Tills Pockets store Upen Banks All Banks Type Total Cash Total Other Total Till \$0.00 \$0.00 \$0.00

4. Highlight the till you are taking the money from and press the **Refund Order** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen							, <u> </u>	

5. Select the order type that the check being refunded was originally rung up under.



6. Select the date that the check being refunded was originally rung up on.

Today	07/05/:	2011	ВК	Clear	Enter original check date/time	
Now	05:28PN	4	ВК	Clear	■ July, 2011	
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		ENTER	Today: 7/5/2011	

7. You will be brought to the ordering screen. From here, enter everything that is on the original ticket just as it was originally rung up. Notice the () around the price of each item and the totals. You are ringing up a negative amount on this check to reflect the refund. When you have entered all items on the original check, press the **Refund Tender** button at the bottom of the screen.

SoftTouch DOS Drawer	History Info Del	ivery Dispatch Counte	r Take Out Pick Up	Bar Dining E	mployee Mana	ger
7/05 05:30p Cassandra	🕓 🔲 👔	s 🥪 🦪		💽 🕜 (😢 🏽	
# - Guest: 1 Seat Nest Seat #1 (\$10.75)	1 2 3	4 5 6	7 8 9	0 C <u>C</u>	Breakfast	Hot Subs
Food (\$10.75) Starters	Food Menu				Pizza	Sides
1 Minestrone (\$3.50) NEW 1 Chicken Caesar Salad (\$7.25) NEW	Breakfast	Pizza	Burgers	Salads	Burgers	Beverages
					Salads	Desserts
	Appetizers	Soups	Pasta	Steaks	Appetizers	Liquor Menu
					Soups	Pool Table
	Chicken	Seatood	Wings	Cold	Pasta	Pool-Table Re-Rental
	and Veal	Sealood	ttings	Subs	Steaks	Cue Rentals
	Hot				Chicken and ¥eal	
	Subs	Sides	Beverages	Desserts	Seafood	
\frown				_	Wings	
#100 (\$11.40)	Liquor Menu	Pool Table	Pool-Table Re-Rental	Cue Rentals	Cold Subs	
Home Go (On Cancel	Change Menu Check DateTime	Clear M Order M	lan. Item Scan	Change Gratuity	

8. Select whether you are refunding cash or applying a refund to a credit card.



9. Select the reason this transaction is being refunded from the list.

Refund Reasons
Pafund Reason List
Customer changed mind
Didn't like food
Food prepared wrong
Food was cold
Other
Out of item
Server rang wrong item
Server training
Cancel $2 + 5$

10. If you selected Credit in step 8, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 8, you will be prompted with a verification screen.

9.3.4 General Refund

You will use the **General Refund** button when you do not have a copy of the guest check and want to refund a general amount.

General Refund Procedure

From any workstation. Be sure to get the money from the pocket of the employee that you select in step 4.

1. Press the Manager icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	*	Tip Pools Tip pool close out
-	Journal Daily transactional journal		Time Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		

3. Press the **Pockets** tab at the top of the screen.

Total Status							
Total Status							Local Tills
TUTAI STATUS	Total	Total Other	Total Cash	Туре		9	Bank Name
\$0.00	\$0.00	\$0.00	\$0.00	Till			Till #1
\$C 	\$0	\$0.00	\$0.00	Till			Till #1

4. Highlight the pocket you are taking the money from and press the **General Refund** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the total amount that you are refunding (including the tax).



6. Select whether you are refunding cash or applying a refund to a credit card.



. Select the reason for the refund	d from the list.	
	Refund Reasons	
Refund Reason List		
Customer changed mind		ŕ
Didn't like food		
Food prepared wrong		H
Food was cold		
Other		
Out of item		
Server rang wrong item		
Server training		
	Cancel	∱ €

8. If you selected Credit in step 6, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 6, you will be prompted with a verification screen.

9.3.5 Transfer from Store

You will use the **Transfer from Store** button when you want to transfer money from the default store safe to a till, pocket or another store safe.

Transfer from Store Procedure

From any workstation. Be sure to give the money to the employee whose pocket you select in step 4.

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delive	ry Dispa	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

Altone	A DOS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
/07 06:35p	Cassandra					7			Ø	22			
Ŭ.	General F Set Op date, c	unctio change em	ns ployee, lau	nch backoffi	ce, system	ı reset	8	Alert System	<mark>s</mark> alert mana	igement			
	Reports Print reports						•	Web/I Internet	Internet web brows	er			
2	All Check Find, reopen, I	s Overv reprint adji	riew ust paymen	ts, offline, vo	iids		*	Tip P Tip poo	ools ol close out				
~	Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Bank & Employee Close out Employees and banks awaiting close out						9	Time Time cl	Editor ock editor,	tip fund edite	or & clocked	d in employ	ees
							83	Empl Employ	oyee M ree Shifts, C	anagem Open Time C	ent Jocks		
3							Z	Z Out Z out sy	t /stem wizar	d			
æ	Charge Ti Verify employ	i p Verifi ee declare	i cation ed credit car	d tips									
	Customers an	r s & Loy d loyalty m	yalty naintenance										
1	Accounts House accourt	i nts, gift card	d and card (account mar	nagement								

3. Press the **Pockets** tab at the top of the screen.

Local Tills Bank Name Type Total Cash Total Other					ocal Tillo	_
Bank Name Type Total Cash Total Other					ULAI TIIIS	ľ
	Total Other Total Statu	al Cash To	Туре	e	ank Name	
Till #1 Till \$0.00 \$0.00	\$0.00 \$0.00	\$0.00	Till		il #1	

4. Highlight the pocket you are putting money in and press the **Transfer from Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the amount you are transferring from the store to this pocket.



6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.



9.3.6 Transfer to Store

You will use the **Transfer to Store** button when you want to transfer money from a till, pocket or another store safe to the default store safe.

Transfer to Store Procedure

From any workstation. Be sure to get the money from the pocket of the employee that you select in step 4.

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
₽	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
0)	Accounts House accounts, gift card and card account management	

3. Press the **Pockets** tab at the top of the screen.

	All Tills Pockets	Store Open Banks	All Banks			
Local Tills						
Bank Name		Type	Total Cash	Total Other	Total	Status
Till #1		Till	\$0.00	\$0.00	\$0.00	

4. Highlight the pocket you are taking the money from and press the **Transfer to Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the amount you are transferring from the pocket to the default store safe.



6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.

9.3.7 Transfer To...

You will use the Transfer To... button when you want to transfer money from one till, pocket or store safe

to another till, pocket or store safe.

Transfer To... Procedure

From any workstation. Be sure to get the money from the pocket of the employee that you select in step 4.

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

-			
	General Functions		Alerts System electmenedement
5	Set op dale, change employee, idanon backonice, system ieset.		System diet management
	Reports		Web/Internet
	Print reports		Internet web browser
	All Checks Overview	H	Tip Pools
1	Find, reopen, reprint, adjust payments, offline, voids		Tip pool close out
	Journal	(And)	Time Editor
-	Daily transactional journal	No.	Time clock editor, tip fund editor & clocked in employees
7	Banks (Tills/Pockets)	-2	Employee Management
	Paid IN/OUT, refunds, \$ transfers, driver banks and balances	873 I	Employee Shifts, Open Time Clocks
	Bank & Employee Close out		Z Out
3	Employees and banks awaiting close out	Z	Z out system wizard
A	Charge Tip Verification		
<u>E-</u> i	Verify employee declared credit card tips		
-	Customers & Loyalty		
	Customers and loyalty maintenance		
2	Accounts		
	House accounts, gift card and card account management		



3. Press the **Pockets** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks				
Local Tills									
Bank Name	9			Туре		Total Cash	Total Other	Total	Status
Till #1				Till		\$0.00	\$0.00	\$0.00	

4. Highlight the pocket you are taking the money from and press the **Transfer To...** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the Bank (till, pocket or safe) that you are transferring money to from the Bank List.

Bank List Transfer to Cash \$ 📥 Depository Depository \$0.00 Dealer Pocket \$0.00 Safe SelfPay Drawer \$0.00 Server Pocket \$0.00 Station 1 Drawer AM \$0.00 Station 1 Drawer PM \$0.00 Cassi Eubank Pocket Pocket \$0.00 Cancel

6. Enter the amount you are transferring from the pocketl to the Bank (till, pocket or safe).

Enter transfer amount								
1		BK	Clear					
7	8	9	Off					
4	5	6	-					
1	2	3	/					
0	·	00	.00					
CAN	CEL	EN	TER					

- 7. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.
- 8. Take the money from the till selected in step 4 and put it in the Bank (Till, Pocket or Store Safe) you selected in step 5.

9.3.8 Close Out

You will use the **Close Out** button when you want to close out and count a till or pocket. Usually the till or pocket will be closed by the employee that was assigned to this till or pocket when they end their shift. If their shift was closed without the till being closed, or if you wish to assign a fresh till or get fresh pocket totals, you have the ability to close a till or pocket with this procedure.

Close Out Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	0	1.1										
2	8	3										
---	---	---										

6:35p Cassandra 🔲 🧰 🕓 🔲 🦪	🚺 💽 🧭 😫
General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
Reports Print reports	Web/Internet Internet web browser
All Checks Overview Find, reopen, reprint adjust payments, offline, voids	Tip Pools Tip pool close out
Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
Charge Tip Verification Verify employee declared credit card tips	
Customers & Loyalty Customers and loyalty maintenance	
Accounts House accounts, gift card and card account management	

3. Press the **Pockets** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks				
Local Tills									
Bank Name				Туре		Total Cash	Total Other	Total	Status
Till #1				Till		\$0.00	\$0.00	\$0.00	

4. Highlight the till you are closing out and press the **Close Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to Store	Transfer	Close Out	Bank
------	------	--------	---------	---------------	----------------------	----------	-----------	------

5. From the Close Out Checklist screen, press the **Close out bank** button on the right.

SoftTouch POS	
7/06 06:29p Cassandra	
Closeout Checklist	
Close out bank: Till #1	Required Close out bank

6. The screen will display the amount expected and default to that amount being the amount of cash counted for this till, pocket or store safe if you do not have Blind Drop selected in BackOffice set up. If the amount is correct, press Process to finalize the Close Out.

If the amount is not the same as the amount expected, press the <- Change \$ button.

Till/Pocket Clo	oseout	
<u>Till #1</u>		
Total "Cash" amount you should have:	\$140.00	
Enter "Cash" amount you actually have:	\$140.00	<- Change \$
Actual 'Cash" drop amount:	\$140.00	
Over / Under 2		
Quer (linder C0.00		
Over/Under Reason:		
Process	Cancel]

7. Enter the actual amount of money in the till, pocket or store safe in the Enter new drop amount dialog box that becomes available.



8. If the actual amount entered and the expected amount are different, you will see the difference in the Over / Under section of the Till/Pocket Close Out dialog box. If you wish to select the reason for the discrepancy, press the reason button and select the reason from the Over / Under Reasons list.



9. You will now see the Over / Under amount and the reason in the Over / Under section of the Till/Pocket Close Out screen. Now press the Process button at the bottom to finalize.



10. Now press the Process button at the bottom to finalize.

9.3.9 Bank Report

This allows you to take a report on any till, pocket or store safe.

Bank Report Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Deliver	Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5		-	1.1								

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Pockets** tab at the top of the screen.

Local Tills	All Tills Pocke	ts Store	Open Banks	All Banks				
Local Tills								
Bank Name			Туре	Tot	al Cash	Total Other	Total	St
Till #1			Till		\$0.00	\$0.00	\$0.00	

4. Highlight the pocket you are closing out and press the **Bank Report** button.



5. A Daily Batch List will appear. A batch is any period the till was open and closed. You may use the till more than once per day and you would have multiple batches. Each batch will indicate what date and time it was opened and closed and list it's status as Open or Closed. This will enable you to select the report that corresponds with correct shift that the till was used during. If you only use each till once per day, you will only see one batch.

Select the batch that you wish to run a report on.

	Daily Batches	
Batch List		
Shift Date Time	Status	
07/05 05:26pm -	Open	
	Cancel	ۍ 🗲

6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done	Print	Print Dialog	Zoom In	Zoom Out	View 100%	
						I

9.4 Store

Enter topic text here.

9.4.1 Paid In

The Paid In function allows you to pay money into a till or store safe without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In to a Store (Safe) Procedure

From any workstation. Be sure to put the money in the store safe you select in step 4.

1. Press the **Manager** icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management				
	Reports Print reports	Web/Internet Internet web browser				
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out				
-)	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees				
4	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks				
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard				
<u>}</u>	Charge Tip Verification Verify employee declared credit card tips					
	Customers & Loyalty Customers and loyalty maintenance					
1	Accounts House accounts, gift card and card account management					

3. Press the **Store** tab at the top of the screen.

Local Tills All Tills Pocke	ts Store Open Banks	All Banks	
Store			
Bank Name	Туре	Total Cash	Status
Store Bank (Store Safe)	Store	\$0.00	

4. Highlight the safe you are adding the money to (there may be more than 1 in some cases), and press the **Paid In** button.



5. You will be prompted to choose the payment type.

	Payment Types	
Payr	nent Type List	
cash	Cash	
VISA	Visa	
	Mastercard	
Ectary	Amex	
ANN AND AND AND AND AND AND AND AND AND	Discover	
Dianes kdy	Diners/ Carte Bl	
	Cancel	€ ﴿

- 6. Enter the amount of a Paid In.
- 7. Press Yes to the confirmation dialog.
- 8. Be sure to put the money in the store safe you indicated, not the till at the workstation you are performing this action at.

9.4.2 Paid Out

The Paid Out function allows you to pay money out of a till or a store safe without deducting from sales. The system will ask you for reason codes and you can print a report with the reasons.

Paid Out is used when you need to remove money from a till or store safe to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From any workstation. Be sure to get the money from the store safe that you select in step 4.

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay (Cashout	Alerts!								
Today's Special	'5												

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

General F Set Op date, o	unctions change employee, launch backoffice, system rese	et Alerts System alert management
Reports Print reports		Web/Internet Internet web browser
All Check Find, reopen,	s Overview reprint adjust payments, offline, voids	Tip Pools Tip pool close out
Journal Daily transact	ional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
Banks (Ti Paid IN/OUT,	ills/Pockets) refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
Bank & E Employees a	mployee Close out nd banks awaiting close out	Z Out Z out system wizard
Charge T Verify employ	ip Verification ree declared credit card tips	
Customer Customers an	rs & Loyalty d loyalty maintenance	
Accounts House accou	nts, gift card and card account management	

3. Press the **Store** tab at the top of the screen.

Store				
Bank Name		Туре	Total Cash	Status
Store Bank (Store	e Safe)	Store	\$0.00	

4. Highlight the store safe you are adding the money to (there may be more than 1 in some cases), and press the **Paid Out** button.



5. Select the reason money is being removed from the safe.

	Cash Paid	
1		
Cash I	Paid List	
Paid OUT	Driver Paid	<u> </u>
Paid OUT	Driver Tips Paid	
Paid OUT	Paid Out	i militari Bilitari
Paid OUT	Tips Paid	
		•
	Cancel	Ś

- 6. Enter the amount of the Paid Out.
- 7. Press Yes to the confirmation dialog.
- 8. Be sure to take the money from the store safe you indicated, not the till at the workstation you are performing this action at.

9.4.3 Refund Order

You will use the **Refund Order** button when you have a copy of the guest check and want to refund each item and reverse the transaction rather than just entering in a total refund amount as you would with **General Refund**.

Refund Order Procedure

From any workstation. Be sure to get the money from the store safe that you select in step 4.

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Delive	ry Dispato	h Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management			
	Reports Print reports	Web/Internet Internet web browser			
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out			
>) i	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees			
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks			
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard			
≙	Charge Tip Verification Verify employee declared credit card tips				
	Customers & Loyalty Customers and loyalty maintenance				
1)	Accounts House accounts, gift card and card account management				

3. Press the **Stores** tab at the top of the screen.

part

Store				
3ank Name		Туре	Total Cash	Status
Store Banl	(Store Safe)	Store	\$0.00	

4. Highlight the store safe you are taking the money from (there may be more than 1 in some cases), and press the **Refund Order** button.



5. Select the order type that the check being refunded was originally rung up under.

	Select refund order type	
Ŵ	Pick a button option	
	Bar	
	Counter	
	Delivery	
	Dining	
	Takeout	
	Cancel	

6. Select the date that the check being refunded was originally rung up on.

Today	07/05/:	2011	ВК	Clear	Enter original check date/time	
Now	05:28PN	4	ВК	Clear	■ July, 2011	
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		ENTER	Today: 7/5/2011	

7. You will be brought to the ordering screen. From here, enter everything that is on the original ticket just as it was originally rung up. Notice the () around the price of each item and the totals. You are ringing up a negative amount on this check to reflect the refund. When you have entered all items on the original check, press the **Refund Tender** button at the bottom of the screen.

Software Doc Drawer	History Info Del	ivery Dispatch Counte	r Take Out Pick Up	Bar Dining E	Employee Manager
7/05 05:30p Cassandra	() () (s 🥏 🦪		💽 🕜	😢 🗶 <
# - Guest: 1 Seat Nest Seat #1 (\$10.75)	1 2 3	4 5 6	7 8 9	0 C <u>C</u>	Breakfast Hot Subs
Food (\$10.75) Starters	Food Menu				Pizza Sides
1 Minestrone (\$3.50) HEW 1 Chicken Caesar Salad (\$7.25) HEW	Breakfast	Pizza	Burgers	Salads	Burgers Beverage
					Salads Desserts
	Appetizers		Pasta	Steaks	Appetizers Liquor Menu
					Soups Pool Table
	Chicken	Seafood	Wings	Cold	Pasta Pool-Table Re-Renta
	and Veal			Subs	Steaks Cue Rentals
	Hot	Sides	Reveranes	Desserts	Chicken and ¥eal
	Subs	oldes	Develages	Dessens	Seafood
\frown				_	Wings
#100 (\$11.40)	Liquor Menu	Pool Table	Pool-Table Re-Rental	Cue Rentals	Cold Subs
Home Go C	On Cancel	Change Menu Check DateTime	Clear M Order M	lan. Item Scan Refund Tender	Change Gratuity

8. Select whether you are refunding cash or applying a refund to a credit card.



9. Select the reason this transaction is being refunded from the list.

Refund Reasons
Pafund Reason List
Customer changed mind
Didn't like food
Food prepared wrong
Food was cold
Other
Out of item
Server rang wrong item
Server training
Cancel $2 + 5$

10. If you selected Credit in step 8, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 8, you will be prompted with a verification screen.

9.4.4 General Refund

You will use the **General Refund** button when you do not have a copy of the guest check and want to refund a general amount.

General Refund Procedure

From any workstation. Be sure to get the money from the store safe that you select in step 4.

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset	Alerts System alert management	
	Reports Print reports	Web/Internet Internet web browser	
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out	
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor	& clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Manageme Employee Shifts, Open Time Cl	ocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard	
	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		

3. Press the **Stores** tab at the top of the screen.

Store				
Bank Nam	e	Туре	Total Cash	Status
Store Ban	ik (Store Safe)	Store	\$0.00	

4. Highlight the store safe you are taking the money from (there may be more than 1 in some cases), and press the **General Refund** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the total amount that you are refunding (including the tax).



6. Select whether you are refunding cash or applying a refund to a credit card.



7. Select the reason for the refund from the list.

Refund Reasons	
Refund Reason List	
Customer changed mind	
Didn't like food	
Food prepared wrong	
Food was cold	
Other	
Out of item	
Server rang wrong item	
Server training	
Cancel 🥎 🎸	-0

8. If you selected Credit in step 6, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 6, you will be prompted with a verification

screen.

9.4.5 Transfer To...

You will use the **Transfer To...** button when you want to transfer money from one till, pocket or store safe to another till, pocket or store safe.

Transfer To... Procedure

From any workstation. Be sure to get the money from the store safe that you select in step 4.

1. Press the **Manager** icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Store** tab at the top of the screen.

Local Tills All Tills Pockets	Store Open Banks	All Banks	
Store			
Bank Name	Туре	Total Cash	Status
Store Bank (Store Safe)	Store	\$0.00	

4. Highlight the store safe you are taking the money from and press the **Transfer To...** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh								

5. Select the Bank (till, pocket or safe) that you are transferring money to from the Bank List.

	Bank List	
(a)		
Transfer to		
Depository	Depository	Cash \$ 🔺
Dealer Pocket		\$0.00
Safe		\$0.00
SelfPay Drawer		\$0.00
Server Pocket		\$0.00
Station 1 Drawer AM		\$0.00
Station 1 Drawer PM		\$0.00
Cassi Eubank Pocket	Pocket	\$0.00
	Cancel	¢ 🞸

6. Enter the amount you are transferring from the store safe to the Bank (till, pocket or safe).

Enter trans	fer amount		
1		BK	Clear
7	8	9	Off
4	5	6	-
1	2	3	/
0	·	00	.00
CAN	ICEL	EN	TER

- 7. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.
- 8. Take the money from the Store Safe you selected in step 4 and put it in the Bank (Till, Pocket or Store Safe) you selected in step 5.

9.5 Open Banks

Enter topic text here.

9.5.1 Paid In

The Paid In function allows you to pay money into the till (on any terminal with a till) without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In to an Open Bank Procedure

From the workstation you are putting the money into:

1. Press the **Manager** icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. Press the **Open Banks** tab at the top of the screen.

Local Tills A	ll Tills Pockets	Store Open Banks A	ll Banks			
Local Tills						
Bank Name		Туре	Total Cash	Total Other	Total	Status
Till #1		Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are adding the money to and press the **Paid In** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
III		order	Refund	store	Store	10		Repor

5. You will be prompted to choose the payment type.

_		Payment Types	
Pay Pay	ment Type List		
ca\$h	Cash		
VISA	Visa		
	Mastercard		
STATISTICS (Amex		
	Discover		
O altere alter	Diners/ Carte Bl		
		Cancel	ۍ 🗲

- 6. Enter the amount of a Paid In.
- 7. Press Yes to the confirmation dialog.

Confirm	nation Dialog
Paid I T P	IN: \$50.00 Fill #1 Paid in
Yes	No

9.5.2 Paid Out

The Paid Out function allows you to pay money out of the till (on any terminal with a till) without deducting from sales. The system will ask you for reason codes and you can print a report with the reasons.

Paid Out is used when you need to remove money from a till or pocket to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From the workstation you are taking the money from:

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	h Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
Reports	Web/Internet
Print reports	Internet web browser
All Checks Overview	Tip Pools
Find, reopen, reprint, adjust payments, offline, voids	Tip pool close out
Journal	Time Editor
Daily transactional journal	Time clock editor, tip fund editor & clocked in employees
Banks (Tills/Pockets)	Employee Management
Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Shifts, Open Time Clocks
Bank & Employee Close out	Z Out
Employees and banks awaiting close out	Z out system wizard
Charge Tip Verification Verify employee declared credit card tips	
Customers & Loyalty Customers and loyalty maintenance	
Accounts House accounts, gift card and card account management	

3. Press the **Open Banks** tab at the top of the screen.

Local Tills A	l Tills Pockets	Store Open Banks	All Banks			
Local Tills						
Bank Name		Туре	Total Cash	Total Other	Total	Status
Till #1		Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Paid Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the reason money is being removed from the till.

	Cash Paid
Cash	1 Paid List
Paid OUT	Driver Paid
Paid OUT	Driver Tips Paid
Paid OUT	Paid Out
Paid OUT	Tips Paid
	Cancel $\widehat{\mathcal{F}}$

- 6. Enter the amount of the Paid Out.
- 7. Press Yes to the confirmation dialog.



9.5.3 Refund Order

You will use the **Refund Order** button when you have a copy of the guest check and want to refund each item and reverse the transaction rather than just entering in a total refund amount as you would with **General Refund**.

Refund Order Procedure

From the workstation you are refunding the money from:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispati	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

109 16:35p	Cassandra			U		1		-					
	General F Set Op date, c	unction change em	1S ployee, lau	nch backoffi	ice, system	n reset		Alert System	<mark>s</mark> alert mana	gement			
	Reports Print reports						•	Web/ Internet	I nternet web brows	er			
	All Check Find, reopen,	s Overv reprint adj	r iew ust paymen	ts, offline, ∨o	pids			Tip P Tip poo	ools Il close out				
	Journal Daily transact	ional journe	ы				Since Editor Time clock editor, tip fund editor & clocked in employees						es
)	Banks (Ti Paid IN/OUT,	i lls/Poci refunds, \$1	kets) transfers, dr	iver banks a	and balanc	es	Employee Management Employee Shifts, Open Time Clocks						
	Bank & E Employees a	mploye nd banks a	e Close waiting clos	out se out			Z Out Z out system wizard						
	Charge T Verify employ	ip Verif i ree declare	i cation ed credit car	d tips									
	Customers an	r s & Lo y d loyalty m	valty aintenance										
	Accounts House accou	nts, gift can	d and card (account mar	nagement								

3. Press the **Open Banks** tab at the top of the screen.

All Tills	Pockets	Store Open Banks	All Banks			
		Туре	Total Cash	Total Other	Total	Status
		Till	\$0.00	\$0.00	\$0.00	
	All Tills	All Tills Pockets	All Tills Pockets Store Open Banks Type Till	All Tills Pockets Store Open Banks All Banks Type Total Cash Till \$0.00	All Tills Pockets Store Open Banks All Banks Type Total Cash Total Other Till \$0.00 \$0.00	All Tills Pockets Store Open Banks All Banks Type Total Cash Total Other Total Till \$0.00 \$0.00 \$0.00

4. Highlight the till you are taking the money from and press the **Refund Order** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the order type that the check being refunded was originally rung up under.



6. Select the date that the check being refunded was originally rung up on.

Today	07/05/2011		ВК	Clear	Enter original check date/time				
Now	05:28PM		ВК	Clear	■ July, 2011	Þ			
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2			
15 min	2 Days	4	5	6	3 4 5 6 7 8	9			
30 min	3 Days	1	2	3	17 18 19 20 21 22	23			
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6			
60 min	5 Days	CANCE	1 E	INTER	Today: 7/5/2011				

7. You will be brought to the ordering screen. From here, enter everything that is on the original ticket just as it was originally rung up. Notice the () around the price of each item and the totals. You are ringing up a negative amount on this check to reflect the refund. When you have entered all items on the original check, press the **Refund Tender** button at the bottom of the screen.

SoftTouch POS Drawer	History Info Deli	very Dispatch Counte	r Take Out Pick Up	Bar Dining E	Employee Manager
7/05 05:30p Cassandra					
# - Guest: 1 Seat 1 Seat Seat #1 (\$10.75)	1 2 3	4 5 6	7 8 9	0 C <u>C</u>	Breakfast Hot Subs
Food (\$10.75)	Food Menu				Pizza Sides
1 Minestrone (\$3.50) NEW					Burgers Beverages
1 Chicken Caesar Salad (\$7.25) NEW	Breakfast	Pizza	Burgers	Salads	
					Salads Desserts
	Appetizers	Soups	Pasta	Steaks	Appetizers Liquor Menu
	rippenzero	oodpo	T USIN		Soups Pool Table
				Cold Subs	Pasta Pool-Table Re-Rental
	and Veal	Seafood	Wings		Steaks Cue Rentals
					Chicken
	Hot	Sides	Beverages	Desserts	and Veal
	Subs				Seafood
\sim				Cue Rentals	Wings
#100 (\$11.40)	Liquor Menu	Table	Pool-Table Re-Rental		Cold Subs
🕎 Up 📏 Dom					
		Change Check	Clear M	lan. Item Refund	Change
Home Go	On Cancel	Menu DateTime	Order	Scan Tender	Gratuity

8. Select whether you are refunding cash or applying a refund to a credit card.


9. Select the reason this transaction is being refunded from the list.

	Refund Reasons
Defined Dessent List	
Customer changed mind	
Didn't like food	
Food prepared wrong	
Food was cold	
Other	
Out of item	
Server rang wrong item	
Server training	
	Cancel $\widehat{\mathcal{T}}$

10. If you selected Credit in step 8, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 8, you will be prompted with a verification screen.

9.5.4 General Refund

You will use the **General Refund** button when you do not have a copy of the guest check and want to refund a general amount.

General Refund Procedure

From the workstation you are refunding the money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

SoftTou 6/07 06:35p	ch POS Calc Drawer History Info Counter o Cassandra Image: Calc Image: Calc Image: Calc Image: Calc Image: Calc Image: Calc	Pick Up	Bar Dining Employee Manager
2	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	*	Tip Pools Tip pool close out
\$	Journal Daily transactional journal	Q.	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	3	Employee Management Employee Shifts, Open Time Clocks
務	Bank & Employee Close out Employees and banks awaiting close out	Z	Z Out Z out system wizard
E COM	Charge Tip Verification Verify employee declared credit card tips		
•	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		
- per			

3. Press the **Open Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks					
Local Tills			***							
Bank Name				Туре		Total Cash	Total Othe	r	Total	Status
Till #1				Till		\$0.00	\$0.00	D	\$0.00	

4. Highlight the till you are taking the money from and press the **General Refund** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the total amount that you are refunding (including the tax).



6. Select whether you are refunding cash or applying a refund to a credit card.



7. Select the reason for the refund from the list.

Refund Reasons	
Refund Reason List	
Customer changed mind	1
Didn't like food	
Food prepared wrong	H
Food was cold	
Other	
Out of item	
Server rang wrong item	
Server training	Ŧ
Cancel $2 - \sqrt{2}$	

8. If you selected Credit in step 6, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 6, you will be prompted with a verification screen.

9.5.5 Transfer from Store

You will use the **Transfer from Store** button when you want to transfer money from the default store safe to a till, pocket or another store safe.

Transfer from Store Procedure

From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delive	ry Dispa	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
là POS Cassandra												
General F Set Op date, c	unction hange emp	15 ployee, laur	nch backoffi	ce, system	reset	-	Alert: System	<mark>5</mark> alert mana	gement			
Reports Print reports						•	Web/I Internet	web brows	er			
All Check Find, reopen, r	s Overv reprint adju	r iew ust paymen	ts, offline, vo	ids		*	Tip P Tip poo	ools I close out				
Journal Daily transacti	onal journe	al				9	Time Time cl	Editor ock editor,	tip fund edito	or & clocked	in employe	es
Banks (Ti Paid IN/OUT, 1	IIS/Poci refunds, \$ t	(ets) ransfers, dr	iver banks a	und balanc	es	2	Empl Employ	oyee Ma ee Shifts, C	anagem Ipen Time C	ent locks		
Bank & El Employees ar	mploye nd banks a	e Close waiting clos	out se out			Z	Z Out Z out sy	: stem wizar	Ł			
Charge Ti Verify employe	p Verifi ee declare	i cation d credit car	d tips									
Customer Customers and	r s & Loy d loyalty m	alty aintenance										
Accounts House accour	nts, gift card	d and card a	account mar	agement								
	Cassandra General F Set Op date, c Reports Print reports All Check Find, reopen, r Journal Daily transacti Banks (Ti Paid IN/OUT, Bank & El Employees ar Charge Ti Verity employ Customers and House accounts House accounts	Cassandra General Function Set Op date, change em Reports Print reports All Checks Overv Find, reopen, reprint, adju Journal Daily transactional journa Banks (Tills/Pocl Paid IN/OUT, refunds, \$1 Bank & Employee Employees and banks a Charge Tip Verifi Verify employee declare Customers & Loy Customers and loyalty m Accounts House accounts, gift card	Cassandra Cassan	Cassandra (I) (III) (IIII) (IIII) (IIIII) (IIIII) (IIIII) (IIIII) (IIIII) (IIIIII) (IIIII) (IIIIII) (IIIIIII) (IIIIIII) (IIIIIIII	Cessandra () () () () () () () () () () () () ()	Cassandra Image: Content of the second s	Cassandra Image: Constraint of the second secon	Cassandra Image: Constructions Set Op date, change employee, launch backoffice, system reset Alerts System System Reports Image: Constructions Print reports Image: Constructions All Checks Overview Image: Constructions Find, reopen, reprint adjust payments, offline, voids Image: Constructions Journal Image: Constructions Daily transactional journal Image: Constructions Banks (Tills/Pockets) Employ Paid IN/OUT, refunds, \$ transfers, driver banks and balances Image: Constructions Bank & Employee Close out Image: Constructions Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Cassandra Image: Constraint of the second secon	Cassandra Image: Control of the second s	Cassandra Image: Constructions Set Op date, change employee, launch backoffice, system reset Alerts System alert management System alert management Reports Image: Construction of the system reset Print reports Image: Construction of the system reset All Checks Overview Image: Construction of the system alert management Find, reopen, reprint, adjust payments, offline, voids Tip Pools Journal Image: Construction of the system alert management Daily transactional journal Image: Construction of the system alert management Banks (Tills/Pockets) Image: Construction of the system alert management Paid IN/OUT, refunds, \$ transfers, driver banks and balances Employee Management Banks (Employee Close out Image: Construction of the system wizard Charge Tip Verification Z Out Verify employee declared credit card tips Z out system wizard Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Tessandra Image: Im

3. Press the **Open Banks** tab at the top of the screen.

Local Tills	All Tills P	ockets	Store Open Banks	All Banks			
Local Tills							
Bank Name			Туре	Total Cash	Total Other	Total	Status
Till #1			Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are putting money in and press the **Transfer from Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh								

5. Enter the amount you are transferring from the store to this till.

Enter trans	fer amoun	t		
1		ВК	Clear	
7	8	9	Off	
4	5	6	Ŀ	
1	2	3		
0		00	.00	
CAN	CEL	EN	TER	

6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.



9.5.6 Transfer to Store

You will use the Transfer to Store button when you want to transfer money from a till, pocket or another

store safe to the default store safe.

Transfer to Store Procedure

From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	y Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								Parlamenta
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint adjust payments, offline, voids	*	Tip Pools Tip pool close out
	Journal Daily transactional journal	9	Time Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		



3. Press the **Open Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks All Ba	anks			
Local Tills								
Bank Name	9			Туре	Total Cash	Total Other	Total	Status
Till #1				Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Transfer to Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the amount you are transferring from the till to the default store safe.



6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.

9.5.7 Transfer To...

You will use the **Transfer To...** button when you want to transfer money from one till, pocket or store safe to another till, pocket or store safe.

Transfer To... Procedure

From the workstation you are transferring money from:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delive	ry Dispa	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
2	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
<u>A</u>	Charge Tip Verification Verify employee declared credit card tips	
2	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Open Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store Open Banks	All Banks			
Local Tills							
Bank Name			Туре	Total Cash	Total Other	Total	Status
Till #1			Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Transfer To...** button.

	Paid In	Paid Out	Refund Order	General Refund	Transfer from Store	Transfer to Store	Transfer To	Close Out	Bank Report
--	------------	-------------	-----------------	-------------------	------------------------	----------------------	----------------	-----------	----------------

5. Select the Bank (till, pocket or safe) that you are transferring money to from the Bank List.

	Bank List	
1		
Transfer to		
Depository	Depository	Cash \$ 📥
Dealer Pocket		\$0.00
Safe		\$0.00
SelfPay Drawer		\$0.00
Server Pocket		\$0.00
Station 1 Drawer AM		\$0.00
Station 1 Drawer PM		\$0.00
Cassi Eubank Pocket	Pocket	\$0.00
	Cancel	ۍ 🗲

6. Enter the amount you are transferring from the till to the Bank (till, pocket or safe).

Enter trans	fer amount	:	
1		вк	Clear
7	8	9	Off
4	5	6	-
1	2	3	/
0	·	00	.00
CAN	CEL	EN	TER

- 7. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.
- 8. Take the money from the till selected in step 4 and put it in the Bank (Till, Pocket or Store Safe) you selected in step 5.

9.5.8 Close Out

You will use the **Close Out** button when you want to close out and count a till or pocket. Usually the till or pocket will be closed by the employee that was assigned to this till or pocket when they end their shift. If their shift was closed without the till being closed, or if you wish to assign a fresh till or get fresh pocket totals, you have the ability to close a till or pocket with this procedure.

Close Out Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispat	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	'5		-	1.1								

icon.

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts	

3. Press the **Open Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store Open Banks	All Banks			
Local Tills							
Bank Name			Туре	Total Cash	Total Other	Total	Status
Till #1			Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are closing out and press the **Close Out** button.

Paid	Paid	Refund	General	Transfer from Store	Transfer to Store	Transfer	Close Out	Bank
------	------	--------	---------	------------------------	----------------------	----------	-----------	------

5. From the Close Out Checklist screen, press the **Close out bank** button on the right.

SoftTouch POS	
7/06 06:29p Cassandra	
Closeout Checklist	
Close out bank: Till #1	Required Close out bank

6. The screen will display the amount expected and default to that amount being the amount of cash counted for this till, pocket or store safe if you do not have Blind Drop selected in BackOffice set up. If the amount is correct, press Process to finalize the Close Out.

If the amount is not the same as the amount expected, press the <- Change \$ button.

Till/Pocket Clo	oseout	
<u>Till #1</u>		
Total "Cash" amount you should have:	\$140.00	
Enter "Cash" amount you actually have:	\$140.00	<- Change \$
Actual 'Cash" drop amount:	\$140.00	
Duor / Under 2		
Quer (Under CO 00		
Over/Under Reason:		
Process	Cancel]

7. Enter the actual amount of money in the till, pocket or store safe in the Enter new drop amount dialog box that becomes available.



8. If the actual amount entered and the expected amount are different, you will see the difference in the Over / Under section of the Till/Pocket Close Out dialog box. If you wish to select the reason for the discrepancy, press the reason button and select the reason from the Over / Under Reasons list.



9. You will now see the Over / Under amount and the reason in the Over / Under section of the Till/Pocket Close Out screen. Now press the Process button at the bottom to finalize.



10. Now press the Process button at the bottom to finalize.

9.5.9 Bank Report

This allows you to take a report on any till, pocket or store safe.

Bank Report Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Deliver	Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5		-	1.1								

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Open Banks** tab at the top of the screen.

Local Tills All Ti	lls Pockets	Store Open Banks All	Banks			
Local Tills						
Bank Name		Туре	Total Cash	Total Other	Total	Status
Till #1		TIU	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are closing out and press the **Bank Report** button.



5. A Daily Batch List will appear. A batch is any period the till was open and closed. You may use the till more than once per day and you would have multiple batches. Each batch will indicate what date and time it was opened and closed and list it's status as Open or Closed. This will enable you to select the report that corresponds with correct shift that the till was used during. If you only use each till once per day, you will only see one batch.

Select the batch that you wish to run a report on.

	Daily Batches	
Batch List		
Shift Date Time	Status	
07/05 05:26pm -	Open	
	Cancel	ۍ 🗲

6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done	Print	Print Dialog	Zoom In	Zoom Out	View 100%	
						•

9.6 All Banks

Enter topic text here.

9.6.1 Paid In

The Paid In function allows you to pay money into the till (on any terminal with a till) without adding to sales.

Paid In is used for sales of gift certificates, money received as a portion of vending machine revenue and restaurant's deposits (the amount does not add to sales)

Paid In to All Banks Procedure

From the workstation you are putting the money into:

1. Press the **Manager** icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
4	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks				
Local Tills									
Bank Name	B.			Туре		Total Cash	 fotal Other	Total	Status
Till #1				Till		\$0.00	\$0.00	\$0.00	

4. Highlight the till you are adding the money to and press the **Paid In** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
-								

5. You will be prompted to choose the payment type.

_	Payment Types	
Pay	vment Type List	
ca\$h	Cash	
VISA	Visa	
	Mastercard	
STATESTON)	Amex	
ANS AND STREET	Discover	
O alexandria	Diners/ Carte Bl	
	Cancel	ۍ 🗲

- 6. Enter the amount of a Paid In.
- 7. Press Yes to the confirmation dialog.

Confirm	mation Dialog	
Paid I T P	IN: \$50.00 Till #1 Paid in	?
Yes	No	

9.6.2 Paid Out

The Paid Out function allows you to pay money out of the till (on any terminal with a till) without deducting from sales. The system will ask you for reason codes and you can print a report with the reasons.

Paid Out is used when you need to remove money from a till or pocket to pay for a repair, buy produce if you run out, etc. (the amount does not deduct from sales)

Paid Out Procedure

From the workstation you are taking the money from:

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	h Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management				
	Reports Print reports	Web/Internet Internet web browser				
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out				
-	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees				
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks				
	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard				
4	Charge Tip Verification Verify employee declared credit card tips					
	Customers & Loyalty Customers and loyalty maintenance					
1	Accounts House accounts, gift card and card account management					

3. Press the **All Banks** tab at the top of the screen.

Local This M	l Tills Pockets	Store	Open Banks	l Banks			
Local Tills							
Bank Name			Туре	Total Cash	Total Other	Total	Status
Till #1			Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Paid Out** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the reason money is being removed from the till.

	Cash Paid
Cash	Paid List
Paid OUT	Driver Paid
Paid OUT	Driver Tips Paid
Paid OUT	Paid Out
Paid OUT	Tips Paid
	Cancel

- 6. Enter the amount of the Paid Out.
- 7. Press Yes to the confirmation dialog.



9.6.3 Refund Order

You will use the **Refund Order** button when you have a copy of the guest check and want to refund each item and reverse the transaction rather than just entering in a total refund amount as you would with **General Refund**.

Refund Order Procedure

From the workstation you are refunding the money from:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
5	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
<u>A</u>	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	ll Banks			
Local Tills								
Bank Nam	8			Туре	Total Cash	Total Other	Total	Status
Till #1				Till	\$0.00	\$0.00	\$0.00	
μ.								

4. Highlight the till you are taking the money from and press the **Refund Order** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Select the order type that the check being refunded was originally rung up under.



6. Select the date that the check being refunded was originally rung up on.

Today	07/05/	2011	ВК	Clear	Enter original check date/time				
Now	05:28PN	1	BK ↓	Clear	■ July, 2011	Þ			
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2			
15 min	2 Days	4	5	6	3 4 5 6 7 8	9			
30 min	3 Days	1	2	3	17 18 19 20 21 22	23			
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6			
60 min	5 Days	CANCE		ENTER	Today: 7/5/2011				

7. You will be brought to the ordering screen. From here, enter everything that is on the original ticket just as it was originally rung up. Notice the () around the price of each item and the totals. You are ringing up a negative amount on this check to reflect the refund. When you have entered all items on the original check, press the **Refund Tender** button at the bottom of the screen.

SoftTouch POS 7/05 05:30p Cassandra	History Info Deli	very Dispatch Counte	r Take Out Pick Up	Bar Dining E	mployee Mana	ger
# - Guest: 1 Seat 1 Next Seat Seat #1 (\$10.75) Food (\$10.75)	1 2 3 Food Menu	4 5 6	789	0 C <u>C</u>	Breakfast Pizza	Hot Subs Sides
Starters 1 Minestrone 1 Chicken Caesar Salad (\$3.50) NEW (\$7.25) NEW	Breakfast	Pizza	Burgers	Salads	Burgers Salads	Beverages Desserts
	Appetizers	Soups	Pasta	Steaks	Appetizers Soups	Liquor Menu Pool Table
	Chicken and Veal	Seafood	Wings	Cold Subs	Pasta Steaks	Pool-Table Re-Rental Cue Rentals
	Hot Subs	Sides	Beverages	Desserts	Chicken and ¥eal Seafood	
#100 (\$11.40)	Liquor Menu	Pool Table	Pool-Table Re-Rental	Cue Rentals	Wings Cold Subs	
Home Go	Dn Cancel	Change Menu DateTime	Clear Order	lan. Item Scan	Change Gratuity	

8. Select whether you are refunding cash or applying a refund to a credit card.



9. Select the reason this transaction is being refunded from the list.

Refund Reasons
Refund Reason List
Customer changed mind
Didn't like food
Food prepared wrong
Food was cold
Other
Out of item
Server rang wrong item
Server training
Cancel $2 + 4$

10. If you selected Credit in step 8, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 8, you will be prompted with a verification screen.

9.6.4 General Refund

You will use the **General Refund** button when you do not have a copy of the guest check and want to refund a general amount.

General Refund Procedure

From the workstation you are refunding the money from:

1. Press the **Manager** icon at the top of your screen.



2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	*	Tip Pools Tip pool close out
E	Journal Daily transactional journal	9	Time Editor Time clock editor, tip fund editor & clocked in employees
)	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	Z	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips		
	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks			
Local Tills								
Bank Name)			Туре	Total Cash	Total Other	Total	Status
rill #1				Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **General Refund** button.

Paid In	Paid Out	Refund Order	General Refund	Transfer from Store	Transfer to Store	Transfer To	Close Out	Bank Report	
Refresh Screen									

5. Enter the total amount that you are refunding (including the tax).



6. Select whether you are refunding cash or applying a refund to a credit card.



7. Select the reason for the refund fro	om the list.	
	Defind Descene	
	Refund Reasons	
Refund Reason List		
Customer changed mind		Â
Didn't like food		
Food prepared wrong		
Food was cold		
Other		
Out of item		
Server rang wrong item		
Server training		
		*
	Cancel	- ∲ 🞸

8. If you selected Credit in step 6, you will need to swipe the credit card or enter the credit card number first, then the expiration date. If you selected Cash in step 6, you will be prompted with a verification screen.

9.6.5 Transfer from Store

You will use the **Transfer from Store** button when you want to transfer money from the default store safe to a till, pocket or another store safe.

Transfer from Store Procedure

From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Ca	shout	Alerts!								
Today's Special	5												
neral Function Op date, change emp ports treports Checks Overv	15 bloyee, laun	ch backoffi	ce, system	reset		Alert	s		we we				
--	--	--	--	--	---	--	--	--	---	--	---		
ports treports Checks Overv					-	System	alert mana	gement					
Checks Overv					•	Web/	I nternet web brows	er					
l, reopen, reprint, adju	iew ust payment:	s, offline, vo	ids		Š	Tip P Tip poo	ools Il close out						
urnal y transactional journa	al				9	Time Time cl	Editor ock editor, t	ip fund edito	r & clocked i	n employee	s		
nks (Tills/Pock HN/OUT, refunds, \$ t	(ets) ransfers, driv	ver banks a	nd balanc	es	*	Empl Employ	oyee Ma ree Shifts, C	anagem (pen Time C	ent locks				
nk & Employe	e Close (waiting close	out e out			Z	Z Out Z out sy	t /stem wizar	ł					
arge Tip Verifi fy employee declare	cation d credit card	tips											
stomers & Loy tomers and loyalty m	alty aintenance												
counts se accounts, gift carc	l and card a	ccount man	agement										
	Irnal transactional journe IN/OUT, refunds, \$ t IN/OUT, IN/OUT, \$ t IN/OUT, \$ t I	Irnal rtransactional journal hks (Tills/Pockets) IN/OUT, refunds, \$ transfers, driv hk & Employee Close loyees and banks awaiting close arge Tip Verification y employee declared credit card stomers & Loyalty omers and loyalty maintenance counts se accounts, gift card and card a	In transactional journal IN/OUT, refunds, \$ transfers, driver banks a IN/OUT, refunds, \$ transfers, driver banks	In transactional journal IN/OUT, refunds, \$ transfers, driver banks and balance IN/OUT, refunds, \$ transfers, driver, driver banks and balan	Arransactional journal Artansactional journal Arks (Tills/Pockets) IN/OUT, refunds, \$ transfers, driver banks and balances Ark & Employee Close out Inverse and banks awaiting close out Arge Tip Verification of y employee declared credit card tips Argens & Loyalty pomers and loyalty maintenance counts are accounts, gift card and card account management	Imal Attansactional journal IN/OUT, refunds, \$ transfers, driver banks and balances Ink & Employee Close out Integer Tip Verification y employee declared credit card tips Integer & Loyalty pomers and loyalty maintenance Integer S & Loyalty pomers and loyalty maintenance	Imal vitransactional journal inks (Tills/Pockets) IN/OUT, refunds, \$ transfers, driver banks and balances ink & Employee Close out loyees and banks awaiting close out loyees and banks awaiting close out arge Tip Verification v employee declared credit card tips stomers & Loyalty omers and loyalty maintenance counts se accounts, gift card and card account management	Imal vitransactional journal inks (Tills/Pockets) IN/OUT, refunds, \$ transfers, driver banks and balances ink & Employee Close out loyees and banks awaiting close out inge Tip Verification v employee declared credit card tips Stomers & Loyalty Domers and loyalty maintenance Se accounts, gift card and card account management	Imal Atransactional journal Inks (Tills/Pockets) IN/OUT, refunds, \$ transfers, driver banks and balances Investigation Investigation </td <td>Imal Intrasactional journal Interplayee Interplayee <!--</td--><td>Imal Image: transactional journal Image: transactional journal<!--</td--></td></td>	Imal Intrasactional journal Interplayee Interplayee </td <td>Imal Image: transactional journal Image: transactional journal<!--</td--></td>	Imal Image: transactional journal Image: transactional journal </td		

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	ll Banks			
Local Tills								
Bank Name				Туре	Total Cash	Total Other	Total	Status
Till #1				Till	\$0.00	\$0.00	\$0.00	
1111 #1					\$U.UU	φυ.υυ	φυ.υυ	

4. Highlight the till you are putting money in and press the **Transfer from Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report

5. Enter the amount you are transferring from the store to this till.

Enter trans	fer amoun	t		
1		ВК	Clear	
7	8	9	Off	
4	5	6	-	
1	2	3		
0	·	00	.00	
CAN	CEL	EN	TER	

6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.



9.6.6 Transfer to Store

You will use the Transfer to Store button when you want to transfer money from a till, pocket or another

store safe to the default store safe.

Transfer to Store Procedure

From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	y Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								Parlamenta
Today's Special	5											

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

-			
*	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Print reports	Q	Internet web browser
	All Checks Overview		Tip Pools
	Find, reopen, reprint, adjust payments, offline, voids	600	l ip pool close out
	Journal	(Ph)	Time Editor
	Daily transactional journal	No.	Time clock editor, tip fund editor & clocked in employees
7	Banks (Tills/Pockets)	22	Employee Management
•	Paid IN/OUT, refunds, \$ transfers, driver banks and balances	8 <u>8</u>	Employee Shifts, Open Time Clocks
	Bank & Employee Close out	-	Z Out
2	Employees and banks awaiting close out	4	Z out system wizard
	Charge Tip Verification		
Ê	Verify employee declared credit card tips		
	Customers & Loyalty		
	Customers and loyalty maintenance		
	Accounts		
	House accounts, gift card and card account management		



3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks			
Local Tills								
Bank Name	9			Туре	Total Cash	Total Other	Total	Status
Till #1				Till	\$0.00	\$0.00	\$0.00	
-								

4. Highlight the till you are taking the money from and press the **Transfer to Store** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Refresh Screen								

5. Enter the amount you are transferring from the till to the default store safe.



6. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.

9.6.7 Transfer To...

You will use the **Transfer To...** button when you want to transfer money from one till, pocket or store safe to another till, pocket or store safe.

Transfer To... Procedure

From the workstation you are transferring money to:

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deli	Very Dispa	atch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Casho	ut Alerts!								
Today's Special	5											

2. Press the **Banks (Tills & Pockets)** *Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances* icon.

General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
Reports Print reports	Web/Internet Internet web browser
All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
Charge Tip Verification Verify employee declared credit card tips	
Customers & Loyalty Customers and loyalty maintenance	
Accounts House accounts, gift card and card account management	

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks			
Local Tills								
Bank Name				Туре	Total Cash	Total Other	Total	Status
Till #1				Till	\$0.00	\$0.00	\$0.00	

4. Highlight the till you are taking the money from and press the **Transfer To...** button.

Paid	Paid	Refund	General	Transfer from	Transfer to	Transfer	Close Out	Bank
In	Out	Order	Refund	Store	Store	To		Report
Defined								

5. Select the Bank (till, pocket or safe) that you are transferring money to from the Bank List.

	Bank List	
Transfer to		1
Depository	Denository	Pach &
Dealer Pocket	Depository	\$0.00
Safe		\$0.00
SelfPay Drawer		\$0.00
Server Pocket		\$0.00
Station 1 Drawer AM		\$0.00
Station 1 Drawer PM		\$0.00
Cassi Eubank Pocket	Pocket	\$0.00
	Cancel	∱ ∳

6. Enter the amount you are transferring from the till to the Bank (till, pocket or safe).

Enter trans	fer amount	t	
Ĩ		вк	Clear
7	8	9	Off
4	5	6	-
1	2	3	/
0	·	00	.00
CAN	CEL	EN	TER

- 7. Once you have read the Confirmation Dialog box and verified the information is accurate, press the Yes button to finalize.
- 8. Take the money from the till selected in step 4 and put it in the Bank (Till, Pocket or Store Safe) you selected in step 5.

9.6.8 Close Out

You will use the **Close Out** button when you want to close out and count a till or pocket. Usually the till or pocket will be closed by the employee that was assigned to this till or pocket when they end their shift. If their shift was closed without the till being closed, or if you wish to assign a fresh till or get fresh pocket totals, you have the ability to close a till or pocket with this procedure.

Close Out Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Delivery	Dispato	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
Reports Print reports	Web/Internet Internet web browser
All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
Charge Tip Verification Verify employee declared credit card tips	
Customers & Loyalty Customers and loyalty maintenance	
Accounts House accounts, gift card and card account management	

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks	ġ.				
Local Tills										
Bank Nam	e			Туре		Total Cash	To	tal Other	Total	Status
Till #1				Till		\$0.00		\$0.00	\$0.00	
-										

4. Highlight the till you are closing out and press the **Close Out** button.

Paid In Paid Out Refund Order General Refund Transfer from Store Transfer to Store Transfer To Close Out	C	Transfer To	Transfer to Store	Transfer from Store	General Refund	Refund Order	Paid Out	Paid
---	---	----------------	----------------------	------------------------	-------------------	-----------------	-------------	------

5. From the Close Out Checklist screen, press the **Close out bank** button on the right.

SoftTouch POS	
7/06 06:29p Cassandra	
Closeout Checklist	
Close out bank: Till #1	Required Close out bank

6. The screen will display the amount expected and default to that amount being the amount of cash counted for this till, pocket or store safe if you do not have Blind Drop selected in BackOffice set up. If the amount is correct, press Process to finalize the Close Out.

If the amount is not the same as the amount expected, press the <- Change \$ button.

Till/Pocket Clo	oseout	
<u>Till #1</u>		
Total "Cash" amount you should have:	\$140.00	
Enter "Cash" amount you actually have:	\$140.00	<- Change \$
Actual 'Cash" drop amount:	\$140.00	
Over / Under ?		
Over/Under \$0.00		
Over/Under Reason:		
Process	Cancel]

7. Enter the actual amount of money in the till, pocket or store safe in the Enter new drop amount dialog box that becomes available.



8. If the actual amount entered and the expected amount are different, you will see the difference in the Over / Under section of the Till/Pocket Close Out dialog box. If you wish to select the reason for the discrepancy, press the reason button and select the reason from the Over / Under Reasons list.



9. You will now see the Over / Under amount and the reason in the Over / Under section of the Till/Pocket Close Out screen. Now press the Process button at the bottom to finalize.



10. Now press the Process button at the bottom to finalize.

9.6.9 Bank Report

This allows you to take a report on any till, pocket or store safe.

Bank Report Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Deliver	Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5		-	1.1								

2. Press the **Banks (Tills & Pockets)** Paid IN/OUT, Refunds, \$ Transfers, Driver Banks and Balances icon.

General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
Reports Print reports	Web/Internet Internet web browser
All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
Charge Tip Verification Verify employee declared credit card tips	
Customers & Loyalty Customers and loyalty maintenance	
Accounts House accounts, gift card and card account management	

3. Press the **All Banks** tab at the top of the screen.

Local Tills	All Tills	Pockets	Store	Open Banks	All Banks					
Local Tills										
Bank Nam	e			Туре		Total Cash	T	otal Other	Total	Status
Till #1				Till		\$0.00		\$0.00	\$0.00	

4. Highlight the till you are closing out and press the **Bank Report** button.



5. A Daily Batch List will appear. A batch is any period the till was open and closed. You may use the till more than once per day and you would have multiple batches. Each batch will indicate what date and time it was opened and closed and list it's status as Open or Closed. This will enable you to select the report that corresponds with correct shift that the till was used during. If you only use each till once per day, you will only see one batch.

Select the batch that you wish to run a report on.

	Daily Batches	
Batch List		
Shift Date Time	Status	
07/05 05:26pm -	Open	
	Cancel	ۍ 🗲

6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done	Print	Print Dialog	Zoom In	Zoom Out	View 100%	

Part

Bank & Employee Close Out

Part 10 Bank & Employee Close Out

This section of the Manager Screen is used when certain Cash Control options have been implemented by the Dealer for the site.

Tills/Pockets Awaiting Drops

In **BackOffice**, you can set certain **Jobs** so that once they close their till or pocket, a manager must count and verify the money then process that drop so the money is transferred to the store safe and the till or pocket is free to start fresh totals for another shift.

In **BackOffice**, from the **Jobs** applet, make sure you select the option to "Have a manager authorize the bank/till closeout transfer before the drop to enable this level of security.

7	Have the manager review tips before the drop
•	have a manager authorize the bank/till closeout transfer before the drop
1	Can the employee job collect his/her tip on closeout without a manager
⊽	Hide sales on employee shift report
~	Enable/Print the employee report on closeout
	Enable "server pocket" quick closeout
~	Do not ask for the till total on the till closeout
lick	here to select a predefine "closeout" setup

Employee's Awaiting Tips

<u>Today's Drops</u>

Every time a till or pocket is closed, the cash collected for guest checks during that shift must be dropped to the store safe. A list of all drops will appear under the **Today's Drops** tab so you can undo a drop, modify a drop or take reports on the activity of the till for the selected shift.

10.1 Tills/Pockets Awaiting Drop

Tills/Pockets Awaiting Drops

In **BackOffice**, you can set certain **Jobs** so that once they close their till or pocket, a manager must count and verify the money then process that drop so the money is transferred to the store safe and the till or pocket is free to start fresh totals for another shift.

In **BackOffice**, from the **Jobs** applet, make sure you select the option to **"Have a manager authorize the bank/till closeout transfer before the drop"** to enable this level of security.

-	have a manager authorize the bank/till closeout transfer before the drop
7	Can the employee job collect his/her tip on closeout without a manager
7	Hide sales on employee shift report
7	Enable/Print the employee report on closeout
	Enable "server pocket" quick closeout
~	Do not ask for the till total on the till closeout

10.1.1 Process Drop

The **Process Drop** function allows a manager to finalize a drop once they have counted the till or pocket and verified the money reported by the employee using the till is accurate.

Process Drop Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager).
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5	1. E. 1	0	1.19								

Ira (III) ral Function late, change em ts orts ecks Overv pen, reprint, adj al nsactional journ	riew ust payment	nch backoffi ts, offline, vo	ce, system	reset		Alerts System a Web/II Internet v	alert mana	gement				
ral Function late, change em ts orts ecks Overv pen, reprint adj al nsactional journ	15 ployee, laur riew ust payment	nch backoffi ts, offline, vo	ce, system	reset	2	Alerts System a Web/In Internet v	alert mana nternet	gement				
ts orts ecks Overv pen, reprint adj al nsactional journ	r iew ust payment	ts, offline, vo			9	Web/Internet v	nternet					
ecks Overv pen, reprint adj al nsactional journe	r iew ust payment	ts, offline, vo	2245		Web/Internet Internet web browser							
al nsactional journa			uds		*	Tip Pool	ools close out					
10	al				9	Time Time clo	Editor ock editor, t	ip fund edito	r & clocked ir	n employees		
Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances					*	Employe	yee Ma ee Shifts, O	nageme pen Time C	ent locks			
& Employe ses and banks a	e Close waiting clos	out e out			Z	Z Out Z out sys	tem wizarc	I				
e Tip Verifinn Ployee declare	i cation d credit car	dtips										
mers & Log ers and loyalty m	alty aintenance											
ints	d and card a	account mar	nagement									
m ers	and loyalty m	ers & Loyalty and loyalty maintenance ats counts, gift card and card a	ters & Loyalty and loyalty maintenance and sounts, gift card and card account mar	ters & Loyalty and loyalty maintenance and sounts, gift card and card account management	Ters & Loyalty and loyalty maintenance Its rounts, gift card and card account management	ers & Loyalty and loyalty maintenance ats sounts, gift card and card account management	ters & Loyalty and loyalty maintenance and sounts, gift card and card account management	ters & Loyalty and loyalty maintenance and sounts, gift card and card account management	ters & Loyalty and loyalty maintenance ts counts, gift card and card account management	ters & Loyalty and loyalty maintenance and sounts, gift card and card account management	ters & Loyalty and loyalty maintenance and sounts, gift card and card account management	

3. The screen will default to the **Tills/Pockets Awaiting Drop** area. You will see any tills or pocket that need to be processed on this screen. You can highlight the till or pocket and press the **Process Drop** button at the bottom of the screen or just press the **Process Drop** button on the beige till or pocket information box.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



4. The Till/Pocket Close Out dialog box will allow you to change the amount in case the employee miscounted, change which safe you are dropping the money to or Process the drop with the default information shown. To finalize, press the Process button at the bottom of the dialog box.

Till/Pocket Clos	eout	
<u>ill #2</u>		
Total "Cash" amount you should have:	\$69.35	
"Cash" amount declared by employee:	\$69.35	<- Change \$
- Actual 'Cash" drop amount:	\$69.35	
)rop amount to which bank? Store Bank (S	itore Safe)	<- Deposit to
Drop amount to which bank? Store Bank (S	itore Safe)	<- Deposit to
Drop amount to which bank? Store Bank (S Dver / Under ? Over/Under \$0.00	itore Safe)	<- Deposit to
Drop amount to which bank? Store Bank (S Dver / Under ? Over/Under \$0.00 Over/Under Reason:	itore Safe)	<- Deposit to
Drop amount to which bank? Store Bank (S Dver / Under ? Dver/Under \$0.00 Dver/Under Reason:	itore Safe)	<- Deposit to

4. Once you finalize the drop by pressing the Process button in the previous step, the till will move off this screen and now show up under the Today's Drops tab.

10.1.2 Undo Drop

Once a bank is closed, you cannot do many functions with it, such as paid outs, refunds, etc. A closed bank is a bank that is no longer in use. The **Undo Drop** function allows a manager change the status of a till or pocket so they can.

Undo Drop Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!						6		
Today's Special	5		-	1.1								

Software	h DOS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager			
/07 06:35p	Cassandra							-	Ø	22				
(à	General Fi Set Op date, ch	unction nange emp	IS bloyee, laur	nch backoffi	ce, system	reset	-	Alerts System	<mark>5</mark> alert mana	lgement				
	Reports Print reports						Web/Internet Internet web browser							
2	All Checks Find, reopen, re	s Overv eprint adju	iew stpayment	ts, offline, vo	ids			Tip P Tip poo	ools I close out					
٤)	Journal Daily transactio	onal journa	d.				9	Time Time cla	Editor ock editor,	tip fund edite	or & clocked	in employe	es	
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances					es	83	Employ	oyee M ree Shifts, C	anagem)pen Time (ent locks			
B)	Bank & En Employees an	nploye d banks av	e Close waiting clos	out e out			Z	Z Out Z out sy	: stem wizar	d				
æ	Charge Tip Verify employe	p Verifi e declare	cation d credit car	d tips										
•	Customers Customers and	s & Loy I loyalty ma	alty aintenance											
7	Accounts House accoun	ts, gift card	and card a	account mar	agement									

3. The screen will default to the **Tills/Pockets Awaiting Drop** area. You will see any tills or pocket that need to be processed on this screen. You can highlight the till or pocket and press the **Undo Drop** button at the bottom of the screen or just press the **Undo Drop** button on the beige till or pocket information box.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



- 4. You keyboard will appear asking you to type YES if you are sure you want to Undo the Drop. Type yes and press enter.
- 5. A Confirmation Dialog box will appear asking if you are sure you want to undo this drop. Press the Yes button.

	Confirm	nation Dialog	
Are vo	ou sure vou w	ant to und	o this drop?
		/	
			(0)
			1
		1	
	Yes	No	

6. Once you have undone the drop, you can go to Banks Tills and Pocket Management to perform the action needed.

10.1.3 Bank Report

You can run a **Bank Report** on any till or pocket that has been closed from this screen.

Bank Report Procedure

1. Press the Manager icon at the top of your screen.



Ge Set Prir	eneral Fund	c tions le employee, la	unch backoffi				Alauta					
Ge Set	eneral Fund et Op date, chang	c tions le employee, la	unch backoffi				Alaste					
Re Prir	enarte			ce, system	reset	-	System	s alert mana	gement			
	int reports					•	Web/I	nternet web brows	er			
All Fin	II Checks O nd, reopen, reprir	verview nt adjust payme	nts, offline, vo	ids			Tip Po Tip poo	ools I close out				
Da	ournal aily transactional	journal				9	Time Time clo	Editor ock editor, t	ip fund edito	or & clocked in employees		
Ba Pai	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances					*	Employ	oyee Ma ee Shifts, O	nagem pen Time C	ent Rocks		
Ba	ank & Empl nployees and ba	oyee Close Inks awaiting clo	e out ose out			2	Z Out Z out system wizard					
Ch Ver	harge Tip V erify employee de	erification	ard tips									
Cu	ustomers &	Loyalty alty maintenanc	е									
] Ac Ho	ccounts ouse accounts, g	ift card and care	l account mar	nagement					>			

3. The screen will default to the **Tills/Pockets Awaiting Drop** area. You will see any tills or pocket that need to be processed on this screen. You can highlight the till or pocket and press the **Bank Report** button at the bottom of the screen.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



4. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



10.1.4 Employee Report

You can run an **Employee Report** on an employee that has worked on a selected till or pocket that has been closed from this screen.

Employee Report Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5	18.1										

SoftTour	th POS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager			
6/07 06:35p	Cassandra			U		~			(4)					
١.	General F Set Op date, c	unctior hange emp	1S oloyee, laur	nch backoffi	ce, system	n reset		Alerts System	<mark>5</mark> alert mana	igement				
	Reports Print reports						Web/Internet Internet web browser							
2	All Check Find, reopen, r	s Overv reprint adju	r iew Ist payment	ts, offline, vo	iids		S	Tip P Tip poo	ools I close out					
«	Journal Daily transacti	onal journe	al				9	Time Time cl	Editor ock editor,	tip fund edito	or & clocked	in employe	es	
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances					es	Employee Management Employee Shifts, Open Time Clocks							
3 <u>8</u>	Bank & El Employees ar	m ploye nd banks a	e Close waiting clos	out e out			Z	Z Out Z out sy	: stem wizar	d				
- CA	Charge Ti Verify employe	i p Verifi ee declare	cation d credit car	dtips										
•	Customers and	r s & Loy d loyalty m	alty aintenance											
	Accounts House accour	nts, gift carc	l and card a	account mar	nagement									
Jun)														

3. The screen will default to the **Tills/Pockets Awaiting Drop** area. You will see any tills or pocket that need to be processed on this screen. You can highlight the till or pocket and press the **Employee Report** button at the bottom of the screen.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



- 4. You will need to select the shift worked by the employee that you want a report for from the list that displays.
- 5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown

below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



10.1.5 Driver Report

You can run a **Driver Report** on a driver that has closed delivery checks and put money in the selected till or pocket (which has been closed) from this screen.

Driver Report Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								8
Today's Special	's	1.5	-									



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
A	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. The screen will default to the **Tills/Pockets Awaiting Drop** area. You will see any tills or pocket that need to be processed on this screen. You can highlight the till or pocket and press the **Driver Report** button at the bottom of the screen.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



- 4. You will need to select the shift worked by the driver that you want a report for from the list that displays.
- 5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown

below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



10.2 Employees Awaiting Tips

Employees Awaiting Tips

In **BackOffice**, you can set certain **Jobs** so that employees turn in all the cash in their till or pocket and collect their tips from the manager from the bank or money source that the manger specifies during this process.

In **BackOffice**, from the **Jobs** applet, make sure you **DO NOT** select the option for **"Can the employee job collect his/her tip on close out without a manager"** to enable this level of security.

Have the manager review tips before the drop						
☑ Have a manager authorize the bank/till closeout transfer before the drop						
	Can the employee job collect his/her tip on closeout without a manager					
V	Hide sales on employee shift report					
•	Enable/Print the employee report on closeout					
	Enable "server pocket" quick closeout					
~	Do not ask for the till total on the till closeout					

10.2.1 Pay Tip

The **Pay Tip** function allows a manager to pay an employee their tips after they close their shift. Tips can be paid from any till or pocket that is open and has cash in it.

Pay Tip Procedure

1. Press the **Manager** icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management				
	Reports Print reports	Web/Internet Internet web browser				
2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out				
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees				
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks				
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard				
ee beer	Charge Tip Verification Verify employee declared credit card tips					
	Customers & Loyalty Customers and loyalty maintenance					
	Accounts House accounts, gift card and card account management					

3. Press the **Employees Awaiting Tips** tab at the top of the screen.



4. You will see any employee waiting for tips that need to be paid on this screen. You can highlight the tip information box and press the **Pay Tip** button at the bottom of the screen or just press the **Process Drop** button on the beige till or pocket information box.

If the Tip information box is beige, that indicates that this is the highlighted or selected tip. A white information box indicates that this tip is not selected.



5. Press the **Pay from** button to select where you are taking the money from to pay this employees tips.

								388
SoftTouch POS 7/12 04:51p Cassandra	r History Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining
Tills/Pockets Awaiting Drops En	nployees Awaiting Tips	Today's Drop	5					
Bartender, Bart 07/12 01:58pm - 07/12 04:2 <i>Tips Owed: \$38.00</i> Declared Cash Tips: \$2.00 Net Min Tips: \$16.15	2pm Pay Tip							
			Till/Poc	ket Closeo	ut			
	Bartender, B	lart						
	Pay out tips a	amount: \$38	.00					
	Pay out tips f	from:				Pa	y from	
		Pro	ocess	Ca	ancel]		

-

6. A list of all open safes, tills or pockets with cash in them will populate the screen. Press the safe, till or pocket you will be taking the money from.

Banks	
Banks	
Depository	Total Cash 🔺
Store Bank (Store Safe)	\$216.82
Till #2	\$90.63
	E
Cancel	∲ €

7. You will see the **"Pay out tips from:"** populate with your selection. To process this request and complete the procedure, press the **Process** button.

Till/Pocket Closeout	
Bartender, Bart	
Pay out tips amount: \$38.00	
Pay out tips from: Store Bank (Store Safe)	Pay from
Process Cancel	

10.2.2 Employee Report

You can run an **Employee Report** on an employee that is waiting for their tips from this screen.

Employee Report Procedure

1. Press the Manager icon at the top of your screen.


	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
-	Charge Tip Verification Verify employee declared credit card tips	
)	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. Press the **Employees Awaiting Tips** tab at the top of the screen.



4. You will see any employees with tips that need to be paid on this screen. You can highlight the employee information box and press the **Employee Report** button at the bottom of the screen.

If the employee information box is beige, that indicates that this is the highlighted or selected employee. A white information box indicates that the employee is not selected.



- 5. You will need to select the shift worked by the employee that you want a report for from the list that displays.
- 6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



10.2.3 Driver Report

You can run a **Driver Report** on a driver that is waiting for their tips from this screen.

Driver Report Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay C	ashout	Alerts!								
Today's Special	5	0813	1		1.12								

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
4	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
] \	Accounts House accounts, gift card and card account management	

3. Press the **Employees Awaiting Tips** tab at the top of the screen.



4. You will see any employees with tips that need to be paid on this screen. You can highlight the employee information box and press the **Driver Report** button at the bottom of the screen.

If the employee information box is beige, that indicates that this is the highlighted or selected employee. A white information box indicates that the employee is not selected.



- 5. You will need to select the shift worked by the driver that you want a report for from the list that displays.
- 6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done	Print	Print Dialog	Zoom In	Zoom Out	View 100%

10.3 Today's Drops

Today's Drops

Every time a till or pocket is closed, the cash collected for guest checks during that shift must be dropped to the store safe. A list of all drops will appear under the **Today's Drops** tab so you can undo a drop, modify a drop or take reports on the activity of the till for the selected shift.

10.3.1 Undo Drop

Once a bank is closed, you cannot do many functions with it, such as paid outs, refunds, etc. A closed bank is a bank that is no longer in use. The **Undo Drop** function allows a manager change the status of a till or pocket so they can.

Undo Drop Procedure

1. Press the **Manager** icon at the top of your screen.





	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the Today's Drops tab at the top of the screen.



4. You will see any tills or pocket that have been processed on this screen. You can highlight the till or pocket and press the **Undo Drop** button at the bottom of the screen or just press the **Undo Drop** button on the beige till or pocket information box if it is available there as well.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



- 5. You keyboard will appear asking you to type YES if you are sure you want to Undo the Drop. Type yes and press enter.
- 6. A Confirmation Dialog box will appear asking if you are sure you want to undo this drop. Press the Yes button.

	Confirn	nation Dialog	
Are yo	u sure you w	ant to und	o this drop?
			0
			P
	Yes	No	

7. Once you have undone the drop, you can go to Banks Tills and Pocket Management to perform the action needed.

10.3.2 Modify Drop

The **Modify Drop** function allows a manager change the amount of money dropped by a till or pocket.

Modify Drop Procedure

1. Press the Manager icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
2)	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. Press the Today's Drops tab at the top of the screen.



4. You will see any tills or pocket that have been processed on this screen. You can highlight the till or pocket and press the **Modify Drop** button at the bottom of the screen or just press the **Modify Drop** button on the beige till or pocket information box.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



5. From the **Till/Pocket Close Out** screen, press the **<- Change \$** button to modify the amount in the till or pocket, then enter the actual amount in the till or pocket and press Enter.



6. If the Total "Cash" amount you should have and the "Cash" amount you actually have if different, you will see an amount in the Over/Under ? section of the Till/Pocket Close Out screen. Press the <- Reason button to enter an explanation.</p>

Till/Pocket Clo	seout	
<u>Till #2</u>		
Total "Cash" amount you should have:	\$69.35	
Enter "Cash" amount you actually have:	\$68.35	<- Change \$
Actual 'Cash" drop amount:	\$68.35	
Over / Under ?		
Under: (\$1.00)		1
Over/Under Reason: Missing Money		<- Reason
Modify	Cancel	

7. Once you have selected a reason from the **Over/Under Reasons** list, that reason will appear in red in

the **Over/Under** section of the **Till/Pocket Close Out** dialog screen. To finalize this change, press the **Modify** button at the bottom of the **Till/Pocket Close Out** dialog screen.

Till/Pocket Clo	seout	
<u>Till #2</u>		
Total "Cash" amount you should have: Enter "Cash" amount you actually have: – Actual 'Cash" drop amount:	\$69.35 \$68.35 \$68.35	<- Change \$
Over / Under ?		
Under: (\$1.00) Over/Under Reason: Missing Money		<- Reason
Modify	Cancel	

10.3.3 Bank Report

You can run a **Bank Report** on any till or pocket that has been closed and dropped from this screen.

Bank Report Procedure

1. Press the Manager icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
2)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
A	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. Press the Today's Drops tab at the top of the screen.



4. You will see any tills or pocket that have been processed on this screen. You can highlight the till or pocket and press the **Bank Report** button at the bottom of the screen.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



10.3.4 Employee Report

You can run an **Employee Report** on an employee that has worked on a selected till or pocket that has been closed from this screen.

Employee Report Procedure

1. Press the Manager icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
<	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
æ	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the Today's Drops tab at the top of the screen.



4. You will see any tills or pocket that have been processed on this screen. You can highlight the till or pocket and press the **Employee Report** button at the bottom of the screen.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



You can run a **Driver Report** on a driver that has closed delivery checks and put money in the selected till or pocket (which has been closed) from this screen.

Driver Report Procedure

1. Press the Manager icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Deliver	y Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!						-		
Today's Special	's											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
•	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
)	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
2	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	

3. Press the **Today's Drops** tab at the top of the screen.

ills/Pockets Awaiting Drops	Employees Awaiting Tips	Today's Drops

4. You will see any tills or pocket that have been processed on this screen. You can highlight the till or pocket and press the **Driver Report** button at the bottom of the screen.

If the Till or Pocket's information box is beige, that indicates that this is the highlighted or selected till. A white information box indicates that this till or pocket is not selected.



5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button



Part

Charge Tip Verification

Part 11 Charge Tip Verification

Charge Tip Verification

In **BackOffice**, you can set certain **Jobs** to require a manager to verify and approve the charge tips the employee has added to their checks.

In **BackOffice**, from the **Jobs** applet, make sure you select the option to **"Have a manager review tips before the drop"** to enable this level of security.

•	Have the manager review tips before the drop
•	Have a manager authorize the bank/till closeout transfer before the drop
	Can the employee job collect his/her tip on closeout without a manager
ন	Hide sales on employee shift report
7	Enable/Print the employee report on closeout
2	Enable "server pocket" quick closeout
•	Do not ask for the till total on the till closeout

11.1 Select Employee

Before you can verify an employee's charged tips, you must first select the employee.

Select Employee Procedure

1. Press the Manager icon at the top of your screen.



2. Press the Charge Tip Verification Verify employee declared credit card tips icon.

SoftTou 6/07 06:35p	Cassandra	Pick Up	Bar Dining Employee Manager
Ž	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Š	Tip Pools Tip pool close out
«	Journal Daily transactional journal	9	Time Editor Time clock editor, tip fund editor & clocked in employees
-	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks
-	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips		
•	Customers & Loyalty Customers and loyalty maintenance		
-	Accounts		

House accounts, gift card and card account management



SoftTo	uch POS	Drawer	History	Info De	livery	Dispatch	
7/12 02:03	õp Cassandra						
Partond	or Part				1		
Chock #	Downont #	Total	Tin	1	1.1	X	
CHECK #	<u>rayment #</u>	IUtai	ць	Change	e	Accept	
			-				
	Select						
- Juse	Employe	e					

3. Press the **Select Employee** button at the bottom of the screen.

4. Touch or click on the name of the employee whose tips you wish to verify to select from the list of employees that are clocked in.

11.2 Sort By

When you are verifying an employee's charged tips, you can change the way the tips are sorted to make it easier to locate a particular tip. You must first select an employee as described below.

Sort By Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Charge Tip Verification** *Verify employee declared credit card tips* icon.

ioftTouc /07 06:35p	Cassandra Calc Drawer History Info Counter	Pick Up Bar Dining Employee Manager
٥¥	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
٤	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
-	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
<u>3</u>	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
ee)	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Select Employee** button at the bottom of the screen.

SoftTo	uch POS	Drawer	History	Info	Delivery	Dispatch
7/12 02:05	ip Cassandra					
Bartende	er, Bart					
Check #	Payment #	<u>Total</u>	Tip			
				Ch	ange	Accept
	Select					
- Jest	Employe	e				
		1 Alexandre				

- 4. Touch or click on the name of the employee whose tips you wish to verify to select from the list of employees that are clocked in.
- 5. A list of all of the selected employee's tips will populate the screen. Press the **Sort By** button at the bottom of the screen.



6. Select the method that you wish to sort by from the Option screen.

	Pick an option	
Ŵ	Pick a button option	
	Check #	
	Payment #	
	Payment \$	
	Tip	
	Cancel	

Check # - The will sort the tips by check number.

- **Payment #** This will sort the tips by payment number.
- **Payment \$** This will sort the tips by the amount of the payment.
- **Tip** This will sort the tips by the tip amount.

11.3 Change Tip Amount

When you are verifying an employee's charged tips, you can change the amount of a tip if it was inaccurately entered. You must first select an employee as described below.

Change Tip Amount Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Charge Tip Verification** *Verify employee declared credit card tips* icon.

oftTouc	h POS Calc Drawer His	story Info Count	er Pick Up	Bar	Dining	Employee	Manager
07 06:35p	Cassandra	9 💷 🦁			4		
Č2	General Functions Set Op date, change employee, launch b	ackoffice, system reset	-	Alerts System al	ert manaç	gement	
	Reports Print reports		9	Web/Internet we	ternet eb browse	er	
2	All Checks Overview Find, reopen, reprint, adjust payments, off	line, voids	÷	Tip Poo Tip pool c	ols lose out		
٤	Journal Daily transactional journal		9	Time E Time clock	ditor k editor, ti	p fund edito	or & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver b	anks and balances	*	Employ Employee	/ee Ma Shifts, Oj	i nagem pen Time C	ent Jocks
3	Bank & Employee Close out Employees and banks awaiting close out		Z	Z Out Z out syste	em wizard		
e)	Charge Tip Verification Verify employee declared credit card tips						
•)	Customers & Loyalty Customers and loyalty maintenance						
1	Accounts House accounts, gift card and card accou	unt management					

3. Press the **Select Employee** button at the bottom of the screen.

SoftTou	ich POS	Drawer	History	Info	Delivery	Dispatch
7/12 02:05	p Cassandra					
			<u> </u>			
Bartende	er, Bart					
Check #	Payment #	<u>Total</u>	<u>Tip</u>	Ch	ange	Accent
					unge	масера
	Salact					
and the second	Employe	e				
		1				
	the second se	out of the local division of the local divis				

- 4. Touch or click on the name of the employee whose tips you wish to verify to select from the list of employees that are clocked in.
- 5. A list of all of the selected employee's tips will populate the screen. You can highlight the tip and press the **Change Tip Amount** button at the bottom of the screen or just press the **Change** button on the beige tip information box.

If the Tip information box is beige, that indicates that this is the highlighted or selected tip. A white information box indicates that this tip is not selected.

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- 6. From the numeric keypad that populates the screen, enter the correct tip amount for this check.
- A Confirmation Dialog box will appear. If the "Add tip amount" is correct tip amount, press the <u>Yes</u> button.
 This will add this tip amount IN PLACE OF the old tip amount. It will not add this tip amount to the

existing tip amount.

Confirm	nation Dialog						
 Add tip amount \$20.00?							
 Paym Payme Chec	nent # 20 nt \$117.40 ck # 118						
Yes	No						

You will see the change reflect on the screen.

11.4 Accept Tip

Once a manager has verified a tip is correct, they will "Accept" the tip as a verified amount. You must first select an employee as described below.

Accept Tip Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Charge Tip Verification** *Verify employee declared credit card tips* icon.

ioftTouc /07 06:35p	Cassandra Calc Drawer History Info Counter	Pick Up Bar Dining Employee Manager
٥¥	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
٤	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
-	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
<u>3</u>	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
ee)	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Select Employee** button at the bottom of the screen.

SoftTo	uch POS	Drawer	History	Info	Delivery	Dispatch
7/12 02:05	ip Cassandra					
				-	_	
Bartende	er, Bart					
Check #	Payment #	<u>Total</u>	<u>Tip</u>	Ch	ange	Accent
				- Chi	unge	мссерс
_ (Foloct					
	Select					
and the	Employe	e				
a jui	Employe	e				

- 4. Touch or click on the name of the employee whose tips you wish to verify to select from the list of employees that are clocked in.
- 5. A list of all of the selected employee's tips will populate the screen. You can highlight the tip and press the **Accept Tip** button at the bottom of the screen or just press the **Accept** button on the beige tip information box.

If the Tip information box is beige, that indicates that this is the highlighted or selected tip. A white information box indicates that this tip is not selected.

SoftTo	uch POS	Drawer	History	Info	Delivery	Dispatch	Counter	Та					
7/12 02:07	'p Cassandra		G					-0					
Bartender, Bart													
<u>Check #</u> 102	Payment # 4	<u>Total</u> \$115.93	<u>Tip</u> \$20.00	Cha	nge	Accept							
<u>Check #</u> 103	<u>Payment #</u> 5	<u>Total</u> \$127.74	<u>Tip</u> \$22.00	Cha	nge	Accept	Ī						
<u>Check #</u> 104	Payment # 6	<u>Total</u> \$209.83	<u>Tip</u> \$45.00	Cha	nge	Accept							
<u>Check #</u> 107	Payment # 9	<u>Total</u> \$100.63	<u>Tip</u> \$10.00	Cha	nge	Accept							
<u>Check #</u> 109	Payment # 11	<u>Total</u> \$153.49	<u>Tip</u> \$30.00	Cha	nge	Accept							
<u>Check #</u> 110	Payment # 12	<u>Total</u> \$96.43	<u>Tip</u> \$20.00	Cha	nge	Accept							
<u>Check #</u> 111	Payment # 13	<u>Total</u> \$64.93	<u>Tip</u> \$22.00	Cha	nge	Accept							
<u>Check #</u> 113	Payment # 15	<u>Total</u> \$74.89	<u>Tip</u> \$15.00	Cha	nge	Accept							
<u>Check #</u> 115	Payment # 17	<u>Total</u> \$116.46	<u>Tip</u> \$20.00	Cha	nge	Accept							
<u>Check #</u> 117	Payment # 19	<u>Total</u> \$86.78	<u>Tip</u> \$20.00	Cha	nge	Accept							
<u>Check #</u> 118	Payment # 20	<u>Total</u> \$117.40	<u>Tip</u> \$22.00	Cha	nge	Accept							
				11	I								
- Jun C	Select	e	iort Ch By /	ange Tip Amount	Acc	cept	Accept All						

6. Once you press the **Accept Tip** button at the bottom of the screen or just press the **Accept** button on the beige tip information box, this tip will be removed from the list of tips that need to be verified by the manager.
11.5 Accept All

Rather than accept tips one at a time, a manager may wish to verify the tips on screen, then **Accept All** tips at once. You must first select an employee as described below.

Accept All Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Charge Tip Verification** *Verify employee declared credit card tips* icon.

Lassandra						Pick Up	Bar	Dining	Employee	Manager		
General F Set Op date, c	unction hange emp	1S oloyee, laur	nch backoffi	ce, system	ı reset		Alert: System	<mark>5</mark> alert mana	gement			
Reports Print reports						•	Web/I Internet	web brows	er			
All Check Find, reopen, r	s Overv reprint adju	iew ist payment	ts, offline, vo	iids			Tip P Tip poo	ools Il close out				
Journal Daily transacti	onal journa	al				Time Editor Time clock editor, tip fund editor & clocked in employees						
Banks (Ti l Paid IN/OUT, 1	and balanc	es	Employee Management Employee Shifts, Open Time Clocks									
Bank & El Employees ar	m ploye nd banks av	e Close waiting clos	out e out			Z Out Z out system wizard						
Charge Ti Verify employe	p Verifi ee declare	cation d credit car	d tips									
Customer Customers and	r s & Loy d loyalty m	alty aintenance										
Accounts House accour	nts, gift carc	l and card a	account mar	nagement								
	Seneral F Set Op date, o Reports Print reports All Check Find, reopen, r Journal Daily transacti Banks (Ti Paid IN/OUT, Bank & Er Employees ar Charge Ti Verify employ Customers an Accounts House accour	Seneral Function Set Op date, change emp Reports Print reports All Checks Overv Find, reopen, reprint, adju Journal Daily transactional journa Banks (Tills/Pock Paid IN/OUT, refunds, \$ t Bank & Employee Paid IN/OUT, refunds, \$ t Bank & Employee Customers and banks ar Charge Tip Verifi Verify employee declare Customers and loyalty m Accounts House accounts, gift card	Seneral Functions Set Op date, change employee, laur Reports Print reports All Checks Overview Find, reopen, reprint, adjust paymen Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, dr Bank & Employee Close Employees and banks awaiting clos Charge Tip Verification Verify employee declared credit car Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card a	Seneral Functions Set Op date, change employee, launch backoffi Reports Print reports All Checks Overview Find, reopen, reprint adjust payments, offline, vo Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks as Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account mar	Seneral Functions Set Op date, change employee, launch backoffice, system Reports Print reports All Checks Overview Find, reopen, reprint adjust payments, offline, voids Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balance Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Seneral Functions Set Op date, change employee, launch backoffice, system reset Reports Print reports All Checks Overview Find, reopen, reprint adjust payments, offline, voids Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Seneral Functions Set Op date, change employee, launch backoffice, system reset Reports Print reports All Checks Overview Find, reopen, reprint adjust payments, offline, voids Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Seneral Functions Alerts Set Op date, change employee, launch backoffice, system reset System Reports Web/I Print reports Web/I All Checks Overview Internet Find, reopen, reprint adjust payments, offline, voids Fip P Journal System Daily transactional journal Sime Change Cha	Seneral Functions Alerts Set Op date, change employee, launch backoffice, system reset System alert mana Reports Web/Internet Print reports Web/Internet All Checks Overview Tip Pools Find, reopen, reprint, adjust payments, offline, voids Tip Pools Journal Strine Editor Daily transactional journal Time Editor Paid IN/OUT, refunds, \$ transfers, driver banks and balances Employee Ma Bank & Employee Close out Image: Close out Employee Sand banks awaiting close out Image: Close out Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Seneral Functions Alerts Set Op date, change employee, launch backoffice, system reset System alert management Reports Web/Internet Print reports Internet web browser All Checks Overview Tip Pools Find, reopen, reprint adjust payments, offline, voids Tip Pools Journal Time Editor Daily transactional journal Set Cockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Employee Management Bank & Employee Close out Imployee Shifts, Open Time C Employees and banks awaiting close out Imployee Shifts, Open Time C Charge Tip Verification Yerity employee declared credit card tips Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management	Seneral Functions Alerts Set Op date, change employee, launch backoffice, system reset System alert management Reports Web/Internet Print reports Web/Internet All Checks Overview Internet web browser Find, reopen, reprint, adjust payments, offline, voids Tip Pools Journal Time Editor Daily transactional journal Time clock editor, tip fund editor & clocked it Banks (Tills/Pockets) Employee Management Paid IN/OUT, refunds, \$ transfers, driver banks and balances Employee Shifts, Open Time Clocks Bank & Employee Close out Image: Clocked tips Employee se shifts, Open Time Clocks Image: Clocked tips Charge Tip Verification Z out system wizard Verity employee declared credit card tips Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management House accounts, gift card and card account management	Seneral Functions Alerts Set Op date, change employee, launch backoffice, system reset System alert management Reports Web/Internet Print reports Web/Internet All Checks Overview Tip Pools Find, reopen, reprint adjust payments, offline, voids Tip Pools Journal Time Editor Daily transactional journal Time Editor Paid IN/OUT, refunds, \$ transfers, driver banks and balances Employee Management Bank & Employee Close out Itemployee Shifts, Open Time Clocks Employees and banks awaiting close out Itemployee Shifts, Open Time Clocks Customers & Loyalty Customers & Loyalty Customers and loyalty maintenance Accounts House accounts, gift card and card account management House accounts, gift card and card account management

3. Press the **Select Employee** button at the bottom of the screen.

SoftTo	uch POS	Drawer	History	Info	Delivery	Dispatch
7/12 02:05	ip Cassandra					
Bartende	er, Bart					
Check #	Payment #	<u>Total</u>	<u>Tip</u>	Ch	ange	Accept
				-		
					_	
	Select					
S. Jun						
with	Employe	e				

- 4. Touch or click on the name of the employee whose tips you wish to verify to select from the list of employees that are clocked in.
- 5. A list of all of the selected employee's tips will populate the screen. Press the **Accept All** button at the bottom of the screen.



6. Once you press the **Accept All** button at the bottom of the screen, all tip will be removed from the list.

Part

Accounts

The Accounts screen allows you to search and view Member or Gift Card accounts and create new Gift Card accounts.

You can also manage the accounts from here such as:

- adjust the credit limit of an account
- make a refund to an account

Part 12 Accounts

- close an account
- activate/deactivate an account
- reconcile an account etc.

Card Account needs to have a Card # assigned to it. A Card Account is a single person account and can only be applied to one individual. A Card Account can be either pre-paid or not. A Gift Card is an example of a Card Account.

Member Account does not need to have a Card # assigned to it. It is the members inside the Member Account that need to have a Customer Card # assigned to them. A Member Account can hold multiple people in it. People are set up as Customers and then linked to an Account.

For example: a company might have a Member Account at the establishment with different members in it that are the company's employees.

To Get to Accounts Screen

1. Press the Manager icon at the top of the screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Del	ivery Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Casho	ut Alerts!								
Today's Special	5											

2. Press Accounts icon on the bottom of the screen.



ftTou	ch POS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
06:35p	Cassandra			U					(4)				
*	General F Set Op date, d	unction change em	1S ployee, laur	nch backoffi	ce, system	n reset		Alert System	S alert mana	gement			
	Reports Print reports						0	Web/	Internet web brows	er			
	All Check Find, reopen,	(S Overv reprint adju	r iew ust paymen	ts, offline, vo	iids			Tip P Tip poo	ools Il close out				
	Journal Daily transact	tional journe	al				Time Editor Time clock editor, tip fund editor & clocked in emp						s
	Banks (Ti Paid IN/OUT,	es	Employee Management Employee Shifts, Open Time Clocks										
5)	Bank & E Employees a	mploye nd banks a	e Close waiting clos	out e out			Z	Z Out Z out sy	t ⁄stem wizar	d			
4	Charge T Verify employ	ip Verifi /ee declare	i cation ed credit car	d tips									
	Customers an	rs & Loy Id loyalty m	/alty aintenance										
)	Accounts House accou	nts, gift card	d and card a	account mar	nagement								

12.1 Search Card Account

The Search Card Act. button allows you to quickly find the Card Account by the card number.

Search for Card Account

1. Press the **Search Card Act.** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

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- 2. Select the appropriate card account category from the list, deposit or non-deposit (if the restaurant has several card account categories set up).
- 3. Swipe the card or type the card number and press ENTER.

The account info, account summary and recent account transactions are displayed.

12.2 Search Member

The Search Member button allows you to quickly find the member of a Member Account either by either their:

- Phone #
- Last Name
- First Name
- Company Name
- Card #

Search for Member of a Member Account

1. Press the **Search Member** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

- 2. Search for a person of the Member Account in the same manner as you search for a customer in the Delivery or the Take Out modes.
- 3. When the member is found, touch their record and press the **Select Customer** button.

The account info, account summary and recent account transactions are displayed.

12.3 Search Account Number

The **Search Account #** button allows you to quickly find either the Card Account or a Member Account by their account number. The account number is printed on the invoices.

Search for Account Number

1. Press the **Search Account #** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

2. At the prompt enter the account number.

.

12.4 New Card Account / Gift Cards

The **New Card Act.** button allows you to create a new Card Account directly from SoftTouch. **Note:** Unlike Card Accounts, Member Accounts can only be created in the Backoffice.

Your establishment can have Deposit Card Accounts (Pre-Paid) and Non Deposit Card Accounts (a customer will have to pay the balance later through the invoice). A good example of a Pre-paid Deposit Card Account is a Gift Card.

Create Deposit Card Account (Pre-Paid Gift Cards)

1. Press the **New Card Act.** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

2. Select the appropriate card account category from the list, deposit or non-deposit (if the restaurant has several card account categories set up).



3. Swipe the card or enter the card number manually and press ENTER.

4. You'll be prompted to enter the amount of the Gift Card. The quick keys on the right are provided to allow easier and more accurate entry of Gift Card amount.



5. Once you have entered the amount of the Gift Card, you will be taken to a screen that displays the information already entered and additional options.

SoftTouch POS		
6/16 U2:22p Cassandra	ra	
Swipe Card Confirm	Swipe Card Now	
	Please swipe your new card(s) now Newly created cards	<u>Total: \$100.00</u>
	Card #: 4444 \$100.00 Name:	
Cance	cel Add New Change Amount Remove Card Account Name Finish	

From here you can add another card to this transaction by pressing the Add New Card button and repeating steps 3 and 4.

You can also change the amount of a Gift Card that has been added to this transaction by highlighting the card in the Newly Created Cards list and pressing the Change Amount button. A keypad will display allowing you to enter the amount desired.

- If you have more than 1 card, you can remove a card that is listed without the need to cancel the transaction and start again.
- You can add an account name to the card by pressing the Account Name button and entering the name into the keyboard that will display.
- 6. When you are done, press the Finish button



- 7. You will be brought to a screen that will ask what method of payment you are using. Select the method of payment then swipe the credit card (if a credit card is used).
- 8. You will be brought to a confirmation screen. From here you can confirm and finalize, go back to make

changes or cancel the transaction.

SoftTouch POS 6/16 02:38p Cassandra	
Swipe Card	Confirmation
	Purchase 1 card(s) for a total of \$100.00. Confirm below to complete this transaction.
Cance	Back Confirm

Create Non-Deposit Card Account

- 1. Press the **New Card Act.** button.
- 2. Select the appropriate card account category from the list, deposit or non-deposit (if the restaurant has several card account categories set up).
- 3. Swipe the card or enter the card number manually and press **ENTER**.
- 4. You'll be prompted to enter a name for the account. Account name can be called any name you want. Press **ENTER**.
- 5. Enter the credit limit amount for the card account and press **ENTER**.
- 6. If everything is correct press $\ensuremath{\textbf{YES}}$ to a confirmation dialog.

12.5 Adjust Account

The **Adjust Account** button allows to adjust the credit limit amount of a Card Account for both, desposit and non-deposit card accounts.

Adjust Credit Limit Amount of a Deposit Card Account

- 1. Find the account.
- 2. Press the **Adjust +/- Account** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

- 3. Select if the payment is **Cash** or **Credit** by pressing on the appropriate button.
- 4. If it's **Cash** enter the amount being added and press **ENTER**, if everything is correct press **YES** to a confirmation dialog.

If it's **Credit** - swipe the credit card, enter the amount being added, press **ENTER**, if everything is correct press **YES** to a confirmation dialog.

Adjust Credit Limit Amount of a Non-Deposit Card Account

- 1. Find the account.
- 2. Press the Adjust Account button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

- 3. Specify the new credit limit for the card account. You can adjust it to a greater or lesser amount, just punch in the new credit limit amount, press **ENTER**.
- 4. At the confirmation box, Press **Yes** if the information is correct and the old credit limit amount is replaced with the new one.



12.6 Refund Account

The **Refund Account** button allows you to refund an amount to a customer's deposit Card Account.

To Make a Refund

- 1. Find the account.
- 2. Press the **Refund Account** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

- 3. Choose the reason for the refund.
- 4. Enter the amount to refund and press **ENTER**.
- 5. If everything is correct press **YES** to the confirmation dialog.

12.7 Close Account

The **Close Account** button allows you to close both, Member Accounts and Card Accounts if the balance of the account is paid.

Note: You cannot close an account that has a remaining balance.

Close Account

- 1. Find the account.
- 2. Press the **Close Account** button.

Exit	Search Card Act.	Search Member	Search Account #	New Card Act.	Adjust +/- Account	Refund Account	Close	De/Active Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

- 3. If you are sure that you want to close this account press **YES** to a confirmation dialog.
- 4. Information dialog is displayed saying that the account is closed, press **Ok**.

12.8 Deactivate/Activate Account

The **De/Active Account** button allows you to temporarily deactivate the account without having to close it. You can activate it again at a later time.

Deactivate Account

- 1. Find the account.
- 2. Press the **De/Active Account** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

3. If you are sure that you want to deactivate this account press **YES** to a confirmation dialog.

Activate Account Back Again

- 1. Find the account.
- 2. Press the **De/Active Account** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

3. If you are sure that you want to re-activate this account press **YES** to a confirmation dialog.

12.9 Account Name

The **Account Name** button allows to change the account name or assign one if none is present.

Change or Assign New Name to Account

- 1. Find the account.
- 2. Press the **Account Name** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

3. If a name already exists, press the **Clear** button and type in the new one, press **ENTER**.

12.10 Reconcile Account

The **Reconcile Account** button allows to reconcile the non-deposit accounts.

Reconcile Account

- 1. Find the account.
- 2. Press the **Reconcile Account** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

A list of all unreconciled transactions will display.

SoftTouch POS 6/1710:44a Cassandra	Wer History	Info	Delivery	Dispatch	Counter	Take Out
Count Info						
Account Name: Mr Doe			Tot	al Owed: 🧐	55.65	
Group Name: House Act	count		<u>Cleared</u> .	<u>Amount:</u>	0.00	
Card #: 327			Balanc	e Owed: 😫	55.65	
Unreconciled Transactions						
6/17/2011 10:29:28 AM Reconciled \$: \$0.00	(\$9.01) Proposed Reconc	105 iled \$:	Guest (R	Check econciled Ba	Doe, John alance: \$9.0	1
6/17/2011 10:37:47 AM Reconciled \$:	\$9.01 Proposed Recond	iled \$:	Refund R	econciled Ba	alance: (\$9.0	01)
6/17/2011 10:41:55 AM Reconciled \$: \$0.00	(\$55.65) Proposed Reconc	106 iled \$:	Guest (R	Check econciled Ba	Doe, John alance: \$55.	65
					,	
Done	Start Over	Enter Amount	Recon	cile		

- 3. Press the Enter Amount button and type in the amount received from a customer, press ENTER.
- 4. Amounts that the payment was applied to will be marked with the red square on the left side.
 - If a customer sent in the exact payment being owed, the account will be reconciled to the penny.
 - If a customer sent less than owed, the payment will be applied partially and a customer will still owe the balance left after reconciliation.
- 6. Press the **Reconcile** button.
- 7. If everything is correct press **YES** to a confirmation dialog.
- 3. Select the payment method.

You have just reconciled this account.

12.11 Account History

The **Account History** button allows to view a history of transactions of the account.

Account History

- 1. Find the account.
- 2. Press the **Account History** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

12.12 Print Account

The **Print Account** button allows to print the status of the account.

Useful when a customer has a Gift Card and wants to know the remaining credit amount on it.

Print Account

- 1. Find the account.
- 2. Press the **Print Account** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

12.13 Print Invoice(s)

The **Print Invoice(s)** button allows to print invoices for non-deposit accounts.

Note: Invoices are preformated for the No. 9 standard double-window envelope. Just fold them at the small line marks.

Print Invoice(s)

- 1. Find the account.
- 2. Press the **Print Invoice(s)** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

12.14 Delete Transactions

If you use your own accounting software and you don't want to use SoftTouch for reconciliation of accounts, the **Delete Transactions** button allows you to delete the transactions on and before the date that you enter.

Export the account transactions first and then delete them from SoftTouch.

Delete Transactions

- 1. Find the account.
- 2. Press the **Delete Transactions** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

You will be prompted with a warning screen as a precaution. If you are sure, press the Yes button.

Confirm	nation Dialog	
WARNING! This fur transactions for AL cannot be ur	nction will "delete L House Account ndone, Proceed?	" ALI This
Var	No	

- 3. Specify the date up until which you want to delete the transactions. The transactions on that date will also be deleted.
- 4. Press ENTER.
- 5. If you are sure that you want to delete the transactions on and before the specified date press **YES** to a confirmation dialog.
- 6. Type "YES" in the confirmation dialog and press **ENTER**.
- 6. An information dialog pops up saying that transactions have been deleted. Press Ok.

12.15 Reconcile Transactions

The Reconcile Transactions button will automatically reconcile ALL member accounts and a paid-in will be recorded for all unpaid balances.

It is recommended to print all account invoices before reconciling all accounts so that you have a record of the transactions.

Reconcile Transactions

- 1. Search for any account.
- 2. Press the **Reconcile Transactions** button.

Exit	Search	Search	Search	New	Adjust +/-	Refund	Close	De/Active
	Card Act.	Member	Account #	Card Act.	Account	Account	Account	Account
Account Name	Reconcile Account	Account History	Print Account	Print Invoice(s)	Delete Transactions	Reconcile Transactions		

You will be prompted with a warning screen as a precaution. If you are sure, press the Yes button.



- 3. Specify the date up until which you want to reconcile the transactions. The transactions on that date will also be reconciled.
- 4. Press **ENTER**.
- 5. Select a payment type for the reconciliation.
- 6. If you are sure that you want to reconcile the transactions on and before the specified date press **YES** to a confirmation dialog.
- 7. Type "YES" in the confirmation dialog and press ENTER.
- 8. Information dialog pops up saying that transactions have been reconciled. Press Ok.

Part

Tip Pools

Part 13 Tip Pools

<u>Tip Pools</u>

In **BackOffice**, you can set **Tip Dispersions** and **Tip Pools**. From this area in SoftTouch's front of house, you can run a report to see how much is currently in the pool and how it will be distributed as well as committing a pool, which closes the pool and makes the final calculations as to how the money in the pool will be distributed.

Tip Dispersions and **Tip Pools** are a powerful tool that your restaurant can utilize. Please see the BackOffice manual for complete set up instructions.

13.1 Commit

When you commit a pool, that pool is closed and any additional tips that are added by employees that were joined to the pool will not be added to this pool. **Be sure all participants in a tip pool have added their charged tips to their transactions before committing a pool.**

Commit Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay C	ashout	Alerts!								
Today's Special	'5												

2. Press the **Tip Pools** *Tip pool close out* icon.

SoftTouc	h POS	Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Manager		
6/07 06:35p	Cassandra			U				5	(H)				
٥.	General Functions Set Op date, change employee, launch backoffice, system reset							System alert management					
	Reports Print reports						Web/Internet Internet web browser						
2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids						Tip Pools Tip pool close out						
<	Journal Daily transactional journal						Time Editor Time clock editor, tip fund editor & clocked in employees						
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances						*	Employee Management Employee Shifts, Open Time Clocks					
<u>18</u>	Bank & Employee Close out Employees and banks awaiting close out						2	Z Out Z out system wizard					
e A	Charge Ti Verify employ	p Verifi ee declare	i cation ed credit car	d tips									
•	Customer Customers and	r s & Loy d loyalty m	alty aintenance										
d)	Accounts House accour	nts, gift card	d and card a	account mar	nagement								

3. Press the **Commit** button at the bottom of the screen.



4. You will be asked to enter the amount of Cash Tips that is being added to this pool.



5. If you are sure you want to commit this pool and close it, and that the cash amount reported is correct, press the Yes button in the **Confirmation Dialog** box.



- 6. You will see a screen that tells you that the pool has been committed. Press OK to continue.
- 7. You will see the following screen. Notice the status of the Pool is now Closed and you only have the option to print the **Tip Pool Report**. If you wish to run a report, select the **Tip Pool Report** button.



13.2 Tip Pool Report

You can take a report on a Tip Pool before you commit and close the pool.

Tip Pool Report Procedure

1. Press the Manager icon at the top of your screen.



2. Press the **Tip Pools** *Tip pool close out* icon.

SoftTo 6/07 06:3!	ip Cassandra	Pick Up	Bar Dining Employee Manager					
۵¢	General Functions Set Op date, change employee, launch backoffice, system reset	8	Alerts System alert management					
	Reports Print reports		Web/Internet Internet web browser					
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids		Tip Pools Tip pool close out					
«	Journal Daily transactional journal		Time Editor Time clock editor, tip fund editor & clocked in employees					
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	*	Employee Management Employee Shifts, Open Time Clocks					
*	Bank & Employee Close out Employees and banks awaiting close out	Z	Z Out Z out system wizard					
e e A	Charge Tip Verification Verify employee declared credit card tips							
•	Customers & Loyalty Customers and loyalty maintenance							
-	Accounts							

House accounts, gift card and card account management



3. Press the **Tip Pool Report** button at the bottom of the screen.



4. You will be asked to enter the amount of Cash Tips that is being added to this pool.



5. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done Print	Print	Zoom	Zoom	View
	Dialog	In	Out	100%

Sample Tip Pool Report
```
Tip Pool Report
 Date Time: 7/15/2011 1:55:00 PM
 POOL SUMMARY
  Open B
A Bar Pool
C Start: 7/15/2011 11:55:00 AM
D End: 7/15/2011 1:55:00 PM
           Total CC/Grat: $147.00 🗜
              Cash Tips:
                       $200.00 F
                     _____
             Pool Total: $347.00 G
        Pool Cash Balance:
                         $0.00 H
I EMPLOYEE FUNDERS
  Bartender 🔣
J Bartender, Bart
L Shift #2
  _____
             M 07/15 11:55am 07/15 01:55pm $87.00 N
                     -----
            Shift Total:
                         $87.00
 Bartender, Blade
                      Bartender
 Shift #4
  _____
 07/15 12:15pm 07/15 01:55pm
                        $60.00
                    -----
            Shift Total:
                        $60.00
O FUND DISTRIBUTION
                Priority: 1 P
  Q Bar Back
R Elective, 5%, Fund, Equal Dist.
       .e. .e.
             S FUND DISTRIBUTION Priority: 2
 Bartenders
 Elective, 100%, Fund, Equal Dist.
T Cash
     CC Breakout Total
  U Bartender, Bart Minutes 127
V $100.00 $73.50 $0.00 $173.50
Bartender, Blade Minutes 107
$100.00 $73.50 $0.00 $173.50
  -------
```

W \$200.00 \$147.00 \$0.00 \$347.00

Tip Pool Report

A – Tip Pool Name This is the name that was designated in BackOffice for the pool that this report was run for.

B – Tip Pool Status
 This will tell you the status of the tip pool, open or closed.

C – Tip Pool Start Time The time the tip pool began.

D – Tip Pool End Time The time the tip pool ended.

E – Total CC/Grat

The total amount of charged tips and gratuity charges added to checks belonging to employees that have joined the pool. It will only reflect the charged tips added during the time they were "joined" or clocked into a tip pool or tip fund. If the employee is automatically clocked into this pool when they clock in (this is an option when you set up Tip Pools in BackOffice) al charged tips and gratuities will automatically accumulate in the pool. If the pool is elective, they needed to be joined when they apply their tips for the tips to accumulate in the pool.

F – Cash Tips

This is the amount of cash that was reported for this pool when the pool was committed.

G – Pool Total This is the total amount of money (cash and tips) in the tip pool.

H – Pool Cash Balance

I – Employee Funders

This section lists all employees who were joined to the pool, and closed checks with tips that were added to this pool.

J – Employee Funder Name

This is the name of the first employee who contributed tips to this tip pool or tip fund.

K – Employee Funder Job

This is the job that the first employee who contributed tips to this tip pool or tip fund worked while joined to this tip pool or tip fund.

L – Employee Funder Shift

This is the shift that the first employee who contributed tips to this tip pool or tip fund worked while joined to this tip pool or tip fund.

M – Employee Funder Time

This is the date and time that the first employee who contributed tips to this tip pool or tip fund joined and left this tip pool or tip fund.

N – Employee Funder Tips Contributed Total This is the amount of charged tips and gratuities that the first employee contributed to this tip pool or tip fund.

The report will print items J through N for each additional employee who contributed tips to this tip pool or tip fund.

O – Fund Distribution

This section of the report will tell you who gets paid from the tip pool

P – Priority

This tells you who gets paid first. A Priority 1 fund distribution gets paid before a priority 2 fund distribution.

Q – Fund Distribution Job Name

This tells you which job gets paid from this tip pool or tip fund.

R – Fund Distribution Set Up

This tells you how this fund distribution was set up in BackOffice.

<u>Elective</u> – This means that when an employee clocks in, they are not automatically joined to the tip pool. You also have the choice in BackOffice for Automatic, which means that when somebody clocks in to this job description, they are automatically joined to the tip pool or tip fund.

<u>%</u> - This is the percentage of money in the tip pool that will be pulled out and divided by the number of people clocked in to this job description.

Fund – There are one of 4 places that you can take money from to pay members of a tip pool.

Sales indicates that this job description will be paid the percentage indicated from sales rung by the employees funding this tip pool or tip fund.

Super Department indicates that this job description will be paid the percentage indicated from sales of a super department rung by the employees funding this tip pool or tip fund. For example, a bar back may get paid a % of Liquor sales in exchange for running ice and bringing fresh glasses.

Department indicates that this job description will be paid the percentage indicated from sales of a department rung by the employees funding this tip pool or tip fund. For example, a wine steward may get paid a % of Wine sales in exchange for presenting the wines to the guest.

Fund indicates that this job description will be paid the percentage indicated from charged tips and gratuities received by the employees funding this tip pool or tip fund

Equal Dist. – In BackOffice you can set up a Fund Distribution to pay out all employees equally (Equal Distribution) or based on amount of time invested in the tip pool (Weighted Average).

In the case where weighted average is selected, if there is \$100 to be split by this job group and Al worked 6 hours while Bob worked 2, Al would get \$75 and Bob would get \$25 because Al worked 75% of the total hours worked and Bob only worked 25% of the total hours worked.

With the same scenario and Equal Distribution set up in BackOffice, both Al and Bob would get \$50 each.

S – Fund Distribution

After the money is deducted for the priority 1 Fund Distribution, remaining funds will be divided as specified in the next Fund Distribution. The meaning of all information is the same the information in section O as described above.

T – Title Bar

This is the title bar for the summary area that tells you how much money should be distributed to each employee.

U – Name and Time

This is the name of the employee being paid from the tip pool and how much time they invested in the tip pool.

V – Funds Accumulated

This tells you how much money is due the employee from cash, from credit card tips and total earned.

W – This shows the totals paid out equal the total reported for reconciliation.

Part

Time Editor

Part 14 Time Editor

The **Time Editor** allows you to edit an employees time records, and add or delete time records.

You can also edit an employee's **Tip Share Time Clock**. The difference between Time Clock times and Tip Sharing times is this:

A bartender clocks in at 2:30 pm but doesn't join a Tip Pool until 4:30 pm when 2 other bartenders clock in and prepare for happy hour.

This bartender clocks out and backs out of the Tip Pool at 11:30 pm.

The Time Clock time (total hours worked used for payroll) would be 2:30 pm until 11:30 pm. 9 hours The Tip Share time (total hours joined in the Tip Pool) would be 4:30 pm until 11:30 pm. 7 hours

14.1 Time Clock Editor

The **Time Editor** allows you to edit an employees time records, and add or delete time records.

Access Time Clock Editor Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

6/13 05:31p	h POS Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	<
(2)	General F Set Op date, d	unction change em	ns ployee, laur	nch backot	fice, system	ı reset		Alert System	S alert mana	gement				
	Reports Print reports						•	Web/ Internet	Internet web brows	er				
9	All Check Find, reopen,	s Overv reprint adji	r iew ust payment	ts, offline, v	oids		1 Alexandre	Tip P Tip poo	ools of close out					
\$	Journal Daily transact	ional journe	зI				2	Time Time cl	Editor ock editor, t	ip fund edi	tor & clocke	ed in employ	ees	
	Banks (T i Paid IN/OUT,	i lls/Poci refunds, \$1	kets) transfers, dri	iver banks	and balanc	es	*	Empl Employ	oyee Ma vee Shifts, O	anagem pen Time	Clocks			
*	Bank & E Employees a	mploye nd banks a	e Close waiting clos	out e out			Z	Z Out Z out sy	t /stem wizard	ł				
	Charge T Verify employ	ip Verif i ree declare	i cation ed credit car	d tips										
•	Custome Customers ar	r s & Lo y d loyalty m	/alty aintenance											
	Accounts House accou	i nts, gift car	d and card a	account ma	anagement									

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3. You will default to the **Time Clock Editor** screen.

14.1.1 Select Employee

Before you can alter an employee's time, you must first select the employee.

Select Employee Procedure

1. Press the Manager icon at the top of your screen.



2. Press the Time Editor Time clock editor, tip fund editor & clocked in employees icon.

SoftTou	ch POS	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
6/13 05:31p	Cassandra										(H)	22		<
*	General F Set Op date, (unctio change em	ns ployee, laur	nch backof	fice, system	n reset	8	Alert System	S n alert mana	gement				
	Reports Print reports							Web/ Internet	Internet tweb brows	er				
9	All Check Find, reopen,	ts Over reprint adj	riew ust payment	ts, offline, v	roids			Tip P Tip poo	ools ol close out					
«	Journal Daily transact	tional journ	al				2	Time Time cl	Editor	tip fund edit	or & clocke	ed in employ	ees	
	Banks (T Paid IN/OUT,	ills/Poc refunds, \$	kets) transfers, dr	iver banks	and balanc	ces	務	Empl Employ	loyee Ma /ee Shifts, C	anagem Open Time (ent Clocks			
<u>8</u>	Bank & E Employees a	mploye and banks a	e Close	out e out			2	Z Out Z out sy	t /stem wizaro	ł				
	Charge T Verify employ	ip Verif /ee declare	ication ed credit car	d tips										
	Customers ar	rs & Log nd loyalty m	yalty naintenance											
a	Accounts House accou	s nts, gift car	d and card a	account ma	anagement									
- June C									Ĩ					

3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.



4. A list of employees will populate the screen. Touch or click on the employee name to select.

Employees	
Employee List	
Bartender, Bart	
Bartender, Blade	E
Busboy, Busboy	
Cashier, Carrie	
Cory, Joe	
Dealer Company, Dealer	
Driver Last Name, Driver	
Employee, New	
Cancel	∱ ∳

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5. From here you can select which action you wish to perform using the buttons at the bottom of the page. If you wish to select a different employee, press the **Select Employee** button at the bottom of the screen and repeat step 4.



Punch Card Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispat	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5	18-1	1									

2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

×	General Functions Set Op date, change employee, launch backoffice, system reset	Alerts System alert management
])	Reports Print reports	Web/Internet Internet web browser
<	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
2	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
A	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
	Accounts	

3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.



4. A list of employees will populate the screen. Touch or click on the employee name to select.

	Employees	
Employee List		
Bartender, Bart		ŕ
Bartender, Blade		H
Busboy, Busboy		
Cashier, Carrie		
Cory, Joe		
Dealer Company, Dealer		
Driver Last Name, Driver		
Employee, New		
	Cancel	ۍ 🗲

5. With the employee selected, press the **Punch Card** button at the bottom of the screen.

Select Punch Card Add In/Out Add Break/In	Edit Entry Delete Entry	Reset Timecards Refresh Timecards	
---	-------------------------------	--	--

6. An Information Dialog box will appear asking you if this employee is clocking out or taking a break. Press the appropriate button.

IF THE EMPLOYEE CLOCKS OUT, THE SYSTEM ASSUMES THEY ARE GOING HOME AND THEY WILL NOT BE PAID.

IF THE EMPLOYEE BREAKS OUT, IT ASSUMES THEY ARE TAKING A PAID BREAK AND THEY WILL BE PAID ON THE TIME BETWEEN WHEN THEY BREAK OUT AND CLOCK BACK IN AFTER THEIR BREAK.

IF THE SITE DOES NOT PAY FOR BREAKS, THE EMPLOYEE SHOULD BE CLOCKING OUT WHEN THEY TAKE A BREAK. MANAGERS SHOULD MAKE SURE THAT THE EMPLOYEES ARE NOT BREAKING OUT BY CHECKING WHETHER THE STATUS IS OUT OR BREAK ON THE ATTENDANCE REPORT WHEN THEY CHECK THE IN AND OUT TIMES.

Iı	nformation Dialog	1
Clo	ck Out or Brea	ak?
		10
		$\left(\begin{array}{c} 0 \end{array} \right)$
Clock Out	Break	Cancel

7. A calendar will appear asking you to enter the date and time that you wish to add a punch record for. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/:	2011	ВК	Clear		9	elect j	ounch c	ard time	2	
Now	12:36PN	1	ВК	Clear			Ju	ly, 20	011		Þ
10 min	1 Day	7	8	9	Sun	Mon	Tue	Wed	Thu	Fri	Sat
15 min	2 Days	4	5	6	3	4	5	6	7	8	2 9
30 min	3 Days	1	2	3	10 17	11 18	12 19	13 20	21 21	15 22	16 23
45 min	4 Days	0	АМ	PM	24 31	25 1	26 2	27 3	28 4	29 5	30 6
60 min	5 Days	CANCE		NTER	0	Toda	ay: 7	/14/20	011		

8. You will now see the new time record added to the list of time records for the date range selected.



Select Employee Punch Card	Add In/Out	Add Break/In	Edit Entry	Delete Entry	Reset Timecards	Refresh Timecards

14.1.3 Add In/Out

Add In/Out Procedure

1. Press the Manager icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

SoftTou 6/13 05:31	p Cassandra	Counter Take Out Pick Up Bar Dining Employee Manager
Ž	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
«	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
務	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
C.C.	Charge Tip Verification Verify employee declared credit card tips	
•	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	
and have		

3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.



4. A list of employees will populate the screen. Touch or click on the employee name to select.

Employee List Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie
Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie
Bartender, Blade Busboy, Busboy Cashier, Carrie
Busboy, Busboy Cashier, Carrie
Cashier, Carrie
Cory, Joe
Dealer Company, Dealer
Driver Last Name, Driver
Employee, New
Cancel

5. With the employee selected, press the **Add In/Out** button at the bottom of the screen.



6. A calendar will appear asking you to enter the **"In"** date and time that you wish to add a punch record for. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/:	2011	ВК	Clear	<u>Select "In" date/time</u>	
Now	12:46PN	1	ВК	Clear	■ July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		NTER	Today: 7/14/2011	

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7. A calendar will appear asking you to enter the **"Out"** date and time that you wish to add a punch record for. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/2	2011	ВК	Clear	Select "Out" date/time	
Now	10:47PN	1	ВК	Clear	■ July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri	Sat
15 min	2 Days	4	5	6	3 4 5 6 7 8	29
30 min	3 Days	1	2	3	10 11 12 13 14 15 17 18 19 20 21 22	16 23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE	E. E	NTER	Today: 7/14/2011	

8. You will now see the new time record added to the list of time records for the date range selected.

14.1.4 Add Break/In

Add Break/In Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Delivery	Dispatch	h Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

SoftTou 6/13 05:31	Drawer History Info Delivery Dispatch	Counter	Take Out Pick Up Bar Dining Employee Manager
Ž	General Functions Set Op date, change employee, launch backoffice, system reset	8	Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids		Tip Pools Tip pool close out
«	Journal Daily transactional journal		Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	務	Employee Management Employee Shifts, Open Time Clocks
*	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
ce2	Charge Tip Verification Verify employee declared credit card tips		
•	Customers & Loyalty Customers and loyalty maintenance		
a	Accounts House accounts, gift card and card account management		



3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.

SoftTouch PC	S	Drawer	History	Info	Delivery	Dispatch	Counter
7/14 10:58a Cassa	andra						
	-						
Time Clock Editor	Tip Sha	aring Clock	Editor				
	·None	Date: 7/13	3/2011 - 7	/20/2011			
Clock Date/Tin	no.	Dute: 1) 1.	Type	, 20, 2011	loh		
CIOCK Date/ Hit	ne-		туре		300		
-							
	~						
En	Select						
3. N							
	dia dia mandri dia mandri A dia mandri dia man A dia mandri dia ma	-					

4. A list of employees will populate the screen. Touch or click on the employee name to select.

Employees	
Employee List	
Bartender, Bart	
Bartender, Blade	E
Busboy, Busboy	
Cashier, Carrie	
Cory, Joe	
Dealer Company, Dealer	
Driver Last Name, Driver	
Employee, New	~
Cancel	ۍ 🗲

5. With the employee selected, press the **Add Break/In** button at the bottom of the screen.



6. A calendar will appear asking you to enter the **"In"** date and time that you wish to add a punch record for. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

07/14/2	2011	ВК	Clear		<u>s</u>	elect "	Break" (date/tim	<u>e</u>	
H 1 1 1 1		-								
12:50PN	1	BK	Clear			Ju	ly, 20	011		Þ
1 Day	7	8	9	Sun	Mon	Tue	Wed	Thu	Fri	Sat
				26	27	28	29	30	1	2
2 Days	4	5	6	3	4	5	6	7	8	9
_				10	11	12	13	14	15	16
3 Days	1	2	3	17	18	19	20	21	22	23
				24	25	26	27	28	29	30
4 Days	0	AM	PM	31	1	2	3	4	5	6
5 Days	CANCE		INTER	\bigcirc	Toda	ay: 7/	/14/20	011		
	 7/14/2 12:50PN 1 Day 2 Days 3 Days 4 Days 5 Days 	07/14/2011 12:50PM 1 Day 7 2 Days 4 3 Days 1 4 Days 0 5 Days CANCE	07/14/2011 BK 12:50PM BK 1 Day 7 BK 2 Days 4 5 3 Days 1 2 4 Days 0 AM 5 Days CANCEL E	Image: 7/14/2011BK Clear12:50PMBK Clear1 Day7BK P1 Day782 Days453 Days124 Days0AM5 DaysCANCELENTER	I I I I I I I Day 7 8 9 Sun I Day 7 8 9 Sun 26 I Days 4 5 6 3 10 I Days 1 2 3 10 17 I Days 0 AM PM 24 31 I Days CANCEL ENTER Image: Cancel Content con	I I <tdi< td=""> <tdi< td=""> <tdi< td=""></tdi<></tdi<></tdi<>	D7/14/2011 BK Clear Select " 12:50PM BK Clear Ju 1 Day 7 8 9 Sun Mon Tue 2 Days 4 5 6 3 4 5 3 Days 1 2 3 10 11 12 4 Days 0 AM PM 24 25 26 5 Days CANCEL ENTER Today: 7 7	Image: Press select "Break" (Select "Break" (Se	Today: BK Clear Select "Break" date/time 12:50PM BK Clear July, 2011 1Day 7 8 9 July, 2011 1Day 7 8 9 Sun Mon Tue Wed Thu 26 27 28 29 30 2 Days 4 5 6 7 3 Days 1 2 3 4 5 6 4 Days 0 AM PM 24 25 26 27 28 5 Days CANCEL ENTER ENTER Today: T/14/2011 Today: T/14/2011	T Image: BK clear Clear Select "Break" date/time 12:50PM BK Clear July, 2011 1 Day 7 8 9 Sun Mon Tue Wed Thu Fri 2 Days 4 5 6 7 8 3 Days 1 2 3 4 5 6 7 8 4 Days 0 AM PM FM 11 12 3 4 5 6 7 8 5 Days CANCEL ENTER ENTER ENTER Today: T/14/2011 Today: T/14/2011 Today: T/14/2011

7. A calendar will appear asking you to enter the **"In"** date and time that you wish to add a punch record for. **THIS IS THE TIME THE EMPLOYEE CLOCKED BACK** *IN* **FROM THEIR BREAK**.

There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

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Today	07/14/	2011	ВК	Clear	<u>Select "Out" date/time</u>	
Now	10:47PN	1	вк	Clear	■ July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	10 11 12 13 14 15 17 18 19 20 21 22	16 23
45 min	4 Days	0	АМ	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		ENTER	Today: 7/14/2011	

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8. You will now see the new time record added to the list of time records for the date range selected.

14.1.5 Edit Entry

Edit Entry Procedure

1. Press the Manager icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

/13 05:31p	Cassandra						Ø			5	Ø			
Že)	General F Set Op date, d	unctio change em	ns ployee, laur	nch backot	fice, system	reset		Alert: System	S alert mana	gement				
	Reports Print reports						•	Web/I Internet	Internet web brows	er				
2	All Check Find, reopen,	s Over v reprint adj	riew ust payment	ts, offline, v	oids		-	Tip P Tip poo	ools Il close out					
	Journal Daily transact	ional journ	al				2	Time Time cl	Editor ock editor, t	ip fund edit	tor & clocke	ed in employ	ees	
-	Banks (Ti Paid IN/OUT,	ills/Poc refunds, \$	kets) transfers, dri	iver banks	and balanc	es	務	Empl Employ	oyee Ma ree Shifts, O	anagem pen Time	ent Clocks			
3	Bank & E Employees a	mploye nd banks a	e Close awaiting clos	out e out			Z	Z Out Z out sy	t rstern wizard	ł				
A	Charge T Verify employ	ip Verif ree declare	ication ed credit car	d tips										
	Custome Customers ar	rs & Log Id loyalty m	yalty naintenance											
1)	Accounts House accou	nts, gift car	d and card a	account ma	anagement									

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3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.



4. A list of employees will populate the screen. Touch or click on the employee name to select.

Employee List Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	Employees
Bartender, Bart Bartender, Blade Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	Employee List
Bartender, Blade Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	Bartender, Bart
Busboy, Busboy Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	3artender, Blade
Cashier, Carrie Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	3usboy, Busboy
Cory, Joe Dealer Company, Dealer Driver Last Name, Driver Employee, New	Cashier, Carrie
Dealer Company, Dealer Driver Last Name, Driver Employee, New	Cory, Joe
Driver Last Name, Driver Employee, New	Dealer Company, Dealer
Employee, New	Driver Last Name, Driver
	Employee, New
Cancel	Cancel

5. With the employee selected, highlight the time record you wish to change and press the **Edit Entry** button at the bottom of the screen.



6. A calendar will appear asking you to enter the **"Edit"** date and time that you wish to add a punch record for. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/:	2011	BK ←	Clear	<u>Edit date/time</u>	
Now	12:39PN	4	ВК	Clear	■ July, 2011	▶
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 3 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE	EL E	NTER	Today: 7/14/2011	

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8. You will now see the changed time record in the list of time records for the date range selected.

14.1.6 Delete Entry

Delete Entry Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

/13 05:31p	Cassandra				9	1			-		22		
(že	General Fun Set Op date, chang	ctions ge employee,	launch backc	office, system	n reset	-	Alert System	<mark>s</mark> alert mana	gement				
	Reports Print reports					•	Web/I Internet	Internet web brows	er				
2	All Checks O Find, reopen, repri	verview nt. adjust payn	nents, offline,	voids		1	Tip P Tip poo	ools Il close out					
<	Journal Daily transactional	journal					Time Time cl	Editor ock editor, t	ip fund edit	tor & clocke	ed in employ	ees	
	Banks (Tills/ Paid IN/OUT, refur	Pockets) ids, \$ transfers	, driver bank:	s and balanc	es	*	Empl Employ	oyee Ma ree Shifts, O	anagem pen Time (Clocks			
<u>1</u>	Bank & Empl Employees and ba	loyee Clos anks awaiting	se out close out			Z	Z Out Z out sy	t vstem wizaro	ł				
a la	Charge Tip V Verify employee d	erificatio	n card tips										
•)	Customers 8 Customers and loy	Loyalty ralty maintenal	псе										
7	Accounts House accounts, g	ift card and ca	rd account m	anagement									

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3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.



4. A list of employees will populate the screen. Touch or click on the employee name to select.

	Employees	
Employee List		
Bartender, Bart		ń
Bartender, Blade		E
Busboy, Busboy		
Cashier, Carrie		
Cory, Joe		
Dealer Company, Dealer		
Driver Last Name, Driver		
Employee, New		
	Cancel	

5. With the employee selected, highlight the time record you wish to change and press the **Delete Entry** button at the bottom of the screen.



6. At the Confirmation Dialog box, press Yes if you are sure you would like to delete this time card entry.



YOU CANNOT DELETE AN ENTRY FOR A PERSON THAT IS CLOCKED IN. IF YOU TRY TO YOU WILL GET THE FOLLOWING MESSAGE:

	Information Dia	alog
Cannot re employee n	move this tir nust clockout clock in ent	neclock entry, to remove this try
	<u>O</u> k	

14.1.7 Reset Time Cards

Reset Time Cards Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

 Reports Print reports All Checks Overview Find, reopen, reprint, adjust payments, offline, voids Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Banks Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty 	ġ.	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management	
 All Checks Overview Find, reopen, reprint, adjust payments, offline, voids Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty 		Reports Print reports	Web/Internet Internet web browser	
 Journal Daily transactional journal Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty 	2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out	
Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances Bank & Employee Close out Employees and banks awaiting close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty	«	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees	
Bank & Employee Close out Employees and banks awaiting close out Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty		Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks	
Charge Tip Verification Verify employee declared credit card tips Customers & Loyalty	*	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard	
Customers & Loyalty	e A	Charge Tip Verification Verify employee declared credit card tips		
Customers and loyalty maintenance	•	Customers & Loyalty Customers and loyalty maintenance		
Accounts House accounts, gift card and card account management	d	Accounts House accounts, gift card and card account management		

3. You will default to the **Time Clock Editor** screen. Press the **Select Employee** button at the bottom of the screen.



4. A list of employees will populate the screen. Touch or click on the employee name to select.

	Employees	
Employee List		
Bartender, Bart		<u>^</u>
Bartender, Blade		=
Busboy, Busboy		
Cashier, Carrie		
Cory, Joe		
Dealer Company, Dealer		
Driver Last Name, Driver		
Employee, New		
	Cancel	∱ ∳

5. With the employee selected, highlight the time record you wish to change and press the **Reset Timecards** button at the bottom of the screen.



6. At the Confirmation Dialog box, press Yes if you are sure you would like to reset ALL TIMECARDS for this employee.


C	onfirma	ation Dial	og	
Are you sure	you w time	ant to d ecards?	delete	e all your
Ves		N	0	1

<u>ALL</u> Timecards for this employee only will be deleted.

14.2 Tip Sharing Time Clock

The **Tip Sharing Time Clock** allows you to edit the time an employee is joined to a tip pool or tip dispersion group.

The difference between Time Clock times and Tip Sharing times is this:

A bartender clocks in at 2:30 pm but doesn't join a Tip Pool until 4:30 pm when 2 other bartenders clock in and prepare for happy hour.

This bartender clocks out and backs out of the Tip Pool at 11:30 pm.

The Time Clock time (total hours worked used for payroll) would be 2:30 pm until 11:30 pm. 9 hours The Tip Share time (total hours joined in the Tip Pool) would be 4:30 pm until 11:30 pm. 7 hours

Tip Sharing Time Clock Editor Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Delive	ry Dispate	ch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

50ftTou 5/13 05:31p	ch POS Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	<
۷¢	General Fu Set Op date, cha	nction ange emp	I S Iloyee, laur	nch backot	ffice, system	ı reset	-	Alert System	S I alert mana	gement				
	Reports Print reports						•	Web/	Internet web brows	er				
2	All Checks Find, reopen, rep	Overv i print adju	iew st payment	ts, offline, v	voids		1	Tip P Tip poo	ools ol close out					
«	Journal Daily transaction	nal journa	Ľ					Time Time cl	Editor ock editor, t	iip fund edi	tor & clocke	ed in employ	ees	
	Banks (Till Paid IN/OUT, re	s/Pock funds, \$ tr	(ets) ansfers, dri	iver banks	and balanc	es	務	Empl Employ	oyee Ma /ee Shifts, O	anagem Ipen Time	lent Clocks			
<u>*</u>	Bank & Em Employees and	ployee banks av	e Close vaiting clos	out e out			Z	Z Out Z out sy	t /stem wizard	ł				
	Charge Tip Verify employee	Verific declared	cation d credit car	d tips										
•	Customers Customers and	& Loy loyalty ma	alty aintenance											
	Accounts House accounts	s, gift card	and card a	account ma	anagement					>				

3. Press the **Tip Sharing Time Clock** tab at the top of the screen.



14.2.1 Select Employee

Before you can alter an employee's tip sharing time, you must first select the employee.

Select Employee Procedure

1. Press the Manager icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

oftTou /13 05:31p	Cassandra	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	-
ğ,	General Functi Set Op date, change e	ons employee, lau	nch backot	ffice, system	ı reset	-	Alert System	S alert mana	gement				
	Reports Print reports					•	Web/	Internet web brows	er				
2	All Checks Ove Find, reopen, reprint, a	e rview idjust paymen	ts, offline, v	voids		1	Tip P Tip poo	ools of close out					
~	Journal Daily transactional jou	rnal					Time Time cl	Editor ock editor, t	ip fund edi	tor & clocke	ed in employ	ees	
-	Banks (Tills/Po Paid IN/OUT, refunds,	ckets) \$ transfers, dr	iver banks	and balanc	es	務	Empl Employ	oyee Ma vee Shifts, O	anagem pen Time	ent Clocks			
<u>}</u>	Bank & Employ Employees and bank	ree Close s awaiting clos	out se out			Z	Z Out Z out sy	t /stem wizaro	ł				
<u>e</u>	Charge Tip Ver Verify employee decl	ification ared credit car	d tips										
	Customers & L Customers and loyalty	oyalty maintenance											
1	Accounts House accounts, gift of	ard and card (account ma	anagement					>				

3. Press the **Tip Sharing Time Clock** tab at the top of the screen.



4. Press the **Select Employee** button at the bottom of the screen.



5. A list of employees will populate the screen. Touch or click on the employee name to select.

Employees
Employee List
Bartender, Bart
Bartender, Blade
Busboy, Busboy
Cashier, Carrie
Cory, Joe
Dealer Company, Dealer
Driver Last Name, Driver
Employee, New
Cancel

6. From here you can select which action you wish to perform using the buttons at the bottom of the page. If you wish to select a different employee, press the **Select Employee** button at the bottom of the screen and repeat step 4.



14.2.2 Add Entry

Add Entry Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

SoftTou	ch POS	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	1
6/13 05:31p	Cassandra					<i>_</i>					(%)			<
2	General I Set Op date,	Function change em	ns ployee, laun	ich backof	fice, system	ı reset		Alert System	s alert manaç	gement				
	Reports Print reports						Web/Internet Internet web browser							
9	All Check Find, reopen,	ks Overv , reprint adj	r iew ust payment	s, offline, v	oids		1	Tip P Tip poo	ools Il close out					
«	Journal Daily transac	tional journ	al				2	Time Time cl	Editor ock editor, ti	p fund edito	or & clocke	d in employ	ees	
	Banks (T Paid IN/OUT,	ills/Pocl , refunds, \$	kets) transfers, dri	ver banks	and balanc	es	33	Employ Employ	oyee Ma ree Shifts, Op	nagem pen Time C	ent Nocks			
務	Bank & E Employees a	Employe and banks a	e Close waiting clos	out e out			2	Z Out Z out sy	t /stem wizard	L				
	Charge T Verify employ	ip Verif i yee declare	ication ed credit car	d tips										
•	Custome Customers ar	rs & Loy nd loyalty m	yalty aintenance											
	Accounts House accou	S unts, gift can	d and card a	account me	nagement									
- por														

3. Press the **Tip Sharing Time Clock** tab at the top of the screen.

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oftTouch POS /1405:26p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up
Time Clock Editor Tip Sh	aring Clock	Editor						
(3) Employee: None								
Fund Name	Jo	b Name			In			Out

4. Press the **Select Employee** button at the bottom of the screen.



5. A list of employees will populate the screen. Touch or click on the employee name to select.

Employees	
Employee List	1
Bartender, Bart	
Bartender, Blade	
Busboy, Busboy	
Cashier, Carrie	
Cory, Joe	
Dealer Company, Dealer	
Driver Last Name, Driver	
Employee, New	
Cancel	

6. From here you can add a tip sharing time record. Press the **Add Entry** button a the bottom of the screen.



7. Select the job this employee was working when they qualified to be joined to the tip pool or tip fund from the **Jobs** list that populates the screen.



8. Select the tip pool or tip fund this employee was qualified to be joined to from the **Tip funds** list that populates the screen.

Tip funds
Tip fund list
Runners/Bus
Bartender
Bar Pool
E
Cancel 2

9. A calendar will appear asking you to enter the **"In"** date and time, or the time this employee should have joined the tip pool or tip fund. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/:	2011	BK	Clear	<u>Select "In" date/time</u>	
Now	12:46PN	1	ВК	Clear	■ July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		NTER	Today: 7/14/2011	

10. A Confirmation Dialog box will appear asking you if you wish to add an out time, or time the employee left the tip pool or tip fund. If the employee is still working the pool, press **No**. Otherwise, press **Yes**.



11. If you selected Yes, a calendar will appear asking you to enter the **"Out"** date and time, or the time this employee should have left the tip pool or tip fund. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/	2011	BK	Clear	<u>Select "Out" date/time</u>	
Now	10:47PN	1	ВК	Clear	■ July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE	31 E	NTER	Today: 7/14/2011	

The new **Tip Sharing** time entry will appear on screen.

14.2.3 Edit Entry

Edit Entry Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info Deliver	y Dispat	tch Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

5	1	4

(ž	General Fu Set Op date, ch	unction	15 bloyee, laur	nch backot	fice, system	n reset	-	Alert System	s alert manag	jement						
	Reports Print reports						٩	Web/I Internet	I nternet web browse	r						
2	All Checks Find, reopen, re	overv eprint adju	iew ist payment	s, offline, v	oids		1	Tip P Tip poo	ools ol close out							
<	Journal Daily transactional journal							Time Editor Time clock editor, tip fund editor & clocked in employees								
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances							Empl Employ	oyee Ma ree Shifts, Op	nagem ben Time (ent Clocks					
<u>8</u>	Bank & Employee Close out Employees and banks awaiting close out						Z	Z Out Z out sy	t ⁄stem wizard							
e A	Charge Tip Verify employe	o Verifi e declare	cation d credit car	d tips												
•	Customers Customers and	s & Loy loyalty m	aintenance													
1	Accounts House account	s, gift carc	l and card a	account me	anagement											

3. Press the **Tip Sharing Time Clock** tab at the top of the screen.



4. Press the **Select Employee** button at the bottom of the screen.



5. A list of employees will populate the screen. Touch or click on the employee name to select.

Employees	
Employee List	
Bartender, Bart	
Bartender, Blade	
Busboy, Busboy	
Cashier, Carrie	
Cory, Joe	
Dealer Company, Dealer	
Driver Last Name, Driver	
Employee, New	
Cancel $\widehat{\mathcal{T}}$	et e

6. Highlight the tip sharing time record you wish to adjust. Press the **Edit Entry** button a the bottom of the screen.



7. A calendar will appear asking you to enter the **"In"** date and time, or the time this employee should have joined the tip pool or tip fund. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

					r.		Select	t "In" da	te/time		
Today	07/14/	2011	BK	Clear							
Now	12:46PM	ч	ВК	Clear			Ju	ıly, 20	011		Þ
10 mir	1 Day	7	8	9	Sun	Mon	Tue	Wed	Thu	Fri	Sat
					26	27	28	29	30	1	2
15 min	2 Days	4	5	6	3	4	5	6	7	8	9
					10	11	12	13	(14)	15	16
30 mir	3 Days	1	2	3	17	18	19	20	21	22	23
					24	25	26	27	28	29	30
45 min	4 Days	0	AM	PM	31	1	2	3	4	5	6
60 min	5 Days	CANC		INTER	\subset	Toda	ay: 7	/14/2	011		
	لنسال										

8. A Confirmation Dialog box will appear asking you if you wish to add an out time, or time the employee left the tip pool or tip fund. If the employee is still working the pool, press **No**. Otherwise, press **Yes**.



9. If you selected Yes, a calendar will appear asking you to enter the **"Out"** date and time, or the time this employee should have left the tip pool or tip fund. There are shortcut buttons (Today, Now, 10 min,1 day) or you can touch or put the cursor in the Date or Time field to manually enter the data.

Today	07/14/2	2011	ВК	Clear	<u>Select "Out" date/time</u>	
Now	10:47PN	1	ВК	Clear	July, 2011	Þ
10 min	1 Day	7	8	9	Sun Mon Tue Wed Thu Fri 26 27 28 29 30 1	Sat 2
15 min	2 Days	4	5	6	3 4 5 6 7 8	9
30 min	3 Days	1	2	3	17 18 19 20 21 22	23
45 min	4 Days	0	AM	PM	24 25 26 27 28 29 31 1 2 3 4 5	30 6
60 min	5 Days	CANCE		NTER	Today: 7/14/2011	

The changed **Tip Sharing** time entry will appear on screen.

14.2.4 Delete Entry

Delete Entry Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay C	ashout	Alerts!								
Today's Special	5	6 3 3	1		1.17 64								

2. Press the **Time Editor** *Time clock editor, tip fund editor* & *clocked in employees* icon.

SoftTouc 6/13 05:31p	ch POS Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	<		
Ž	General F Set Op date, c	unctior hange emp	15 oloyee, laur	nch backot	fice, system	ı reset	-	Alert System	S 1 alert mana	gement						
	Reports Print reports		Web/Internet Internet web browser													
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids							Tip Pools Tip pool close out								
«	Journal Daily transactional journal						2	Time Editor Time clock editor, tip fund editor & clocked in employees								
AREA .	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances						骢	Empl Employ	oyee Ma vee Shifts, C	anagem Ipen Time I	ent Clocks					
務	Bank & EI Employees an	nploye Id banks a	e Close waiting clos	out e out			Z	Z Out Z out sy	t /stem wizar	Ł						
e e f f f f f f f f f f f f f f f f f f	Charge Ti Verify employe	p Verifi se declare	cation d credit car	d tips												
•	Customers and	s & Loy d loyalty m	aintenance													
	Accounts House accour	its, gift carc	l and card a	account ma	anagement											

3. Press the **Tip Sharing Time Clock** tab at the top of the screen.





5. A list of employees will populate the screen. Touch or click on the employee name to select.

Employees	
Employee List	1
Bartender, Bart	
Bartender, Blade	
Busboy, Busboy	
Cashier, Carrie	
Cory, Joe	
Dealer Company, Dealer	
Driver Last Name, Driver	
Employee, New	
Cancel $\widehat{\mathcal{T}}$	

6. Highlight the tip sharing time record you wish to delete. Press the **Delete Entry** button a the bottom of the screen.



The **Tip Sharing** time entry will be removed and will no longer appear on screen.

Part

Employee Management

Part 15 Employee Management

The Employee Management procedures allow you to manage employees and their shifts. From here you can clock out all employees at once, close all open employee shifts at once or take a report on an employee with an open shift.

15.1 Open Time Clocks

The **Open Time Clocks** procedure will allow you to clock out all employees at once.

Open Time Clocks Procedure

1. Press the Manager icon at the top of your screen.



SoftTou 6/07 06:35p	Cassandra Calc Drawer History Info Counter	Pick Up	Bar Dining Employee Manager
2	General Functions Set Op date, change employee, launch backoffice, system reset		Alerts System alert management
	Reports Print reports		Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	3	Tip Pools Tip pool close out
۶	Journal Daily transactional journal	9	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances		Employee Management Employee Shifts, Open Time Clocks
<u>88</u>	Bank & Employee Close out Employees and banks awaiting close out	2	Z Out Z out system wizard
ce	Charge Tip Verification Verify employee declared credit card tips		
•	Customers & Loyalty Customers and loyalty maintenance		
	Accounts House accounts, gift card and card account management		



- 3. You will see a list of all employees that are clocked in. Press the **Clock Out Employees** button at the bottom of the screen to clock all employees out.
- 4. If you are sure you want to clock out all employees, press Yes at the Confirmation Dialog box.



15.2 Employee Shifts

The **Employee Shifts** procedure will allow you to close all open employee shifts at once or take a report on an employee with an open shift.

Employee Shifts Procedure

1. Press the **Manager** icon at the top of your screen.



SoftTo	p Cassandra	Pick Up Bar Dining Employee Manager	
2	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management	
	Reports Print reports	Web/Internet Internet web browser	
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out	
«	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees	
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks	
<u>8</u>	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard	
C-C-1	Charge Tip Verification Verify employee declared credit card tips		
•	Customers & Loyalty Customers and loyalty maintenance		
a	Accounts House accounts, gift card and card account management		



3. Press the **Employee Shifts** tab at the top of the screen.

🗿 Open Time	Clocks			
First Name	Last Name	Date Time Clock	Job Name	Page
Carrie	Cashier	7/13/2011 10:18:53 AM	Cashier	
Cassi	Eubank	7/11/2011 5:38:48 PM	Manager	
Bart	Bartender	7/13/2011 10:18:30 AM	Bartender	

4. From here you can **Close All Shifts** for employees with open shifts or take an **Employee Report** for employees with open shifts.

15.2.1 Close All Shifts

The **Close All Shifts** procedure will allow you to close all open employee shifts at once.

Close All Shifts Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/13 04:16p Cassandra	Drawer	History	Info Delivery	Dispatch	h Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay Cashout	Alerts!								
Today's Special	5											

	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
2	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1	Accounts House accounts, gift card and card account management	

3. Press the **Employee Shifts** tab at the top of the screen.

pere

🌀 Open Time (Clocks			
First Name	Last Name	Date Time Clock	Job Name	Pager
Carrie	Cashier	7/13/2011 10:18:53 AM	Cashier	
Cassi	Eubank	7/11/2011 5:38:48 PM	Manager	
Bart	Bartender	7/13/2011 10:18:30 AM	Bartender	

bottom of the screen to clock all employees out.



5. If you are sure you want to close all shift, press Yes at the Confirmation Dialog box.



15.2.2 Employee Report

The **Employee Report** procedure will allow you to take a report on an employee with an open shift.

Employee Report Procedure

1. Press the **Manager** icon at the top of your screen.



	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
2	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
•	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
3	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
e la	Charge Tip Verification Verify employee declared credit card tips	
	Customers & Loyalty Customers and loyalty maintenance	
1)	Accounts House accounts, gift card and card account management	

3. Press the **Employee Shifts** tab at the top of the screen.

12.2.2

🇿 Open Time (Clocks			
First Name	Last Name	Date Time Clock	Job Name	Pager
Carrie	Cashier	7/13/2011 10:18:53 AM	Cashier	
Cassi	Eubank	7/11/2011 5:38:48 PM	Manager	
Bart	Bartender	7/13/2011 10:18:30 AM	Bartender	

for and press the **Employee Report** button at the bottom of the screen.



- 5. A list of this employees shifts will appear. Select the shift you wish to run a report for.
- 6. The report will appear on screen. Once the report is displayed, you can use any of the buttons shown below to Print the report, Zoom In or Out or View the report at 100%. When you are finished with this information, press the Done button

Done Pri	nt Print	Zoom	Zoom	View
	Dialog	In	Out	100%

Part

Z Out

Part 16 Z Out

The **Z Out** procedure will allow you to finalize the days transactions, settle your credit card batch, run reports on today's business and clear totals to prepare for tomorrow's business.

Z Out Procedure

1. Press the **Manager** icon at the top of your screen.

SoftTouch POS 6/1304:16p Cassandra	Drawer	History	Info	Delivery	Dispatch	Counter	Take Out	Pick Up	Bar	Dining	Employee	Manager	
Warnings & Reminders	ChalkBoard	Specials	Self Pay 0	ashout	Alerts!								
Today's Special	5												

2. Press the **Z Out** *Z* out system wizard icon.

6/07 06:35p (Cassandra					TICK OP	Dar	Dining	Employee	Manager		
								Ø				
S S	General Funct Set Op date, change	ions employee, laur	ich backoffic	ce, system	reset		Alerts System	s alert mana	igement			
R P	Reports Print reports					0	Web/I Internet	nterne web brows	t er			
S A	All Checks Ov ind, reopen, reprint	erview adjust payment	s, offline, vo	ids		÷	Tip P Tip poo	ools I close out				
S D	Journal Jaily transactional jo	umal				9	Time Time clo	Editor ock editor,	tip fund edito	or & clocked	in employe	es
P	anks (Tills/P) aid IN/OUT, refund:	ockets) s, \$ transfers, dri	ver banks a	nd balanc	es	*	Employ	oyee M ee Shifts, C	anagem Open Time C	ent Jocks		
8 E	ank & Emplo	yee Close ks awaiting clos	out e out				Z Out Z out sy	stem wizar	d			
C ♥ ♥	harge Tip Ve Verify employee dec	rification lared credit car	d tips									
C c	Customers & I Customers and Ioyal	L oyalty tymaintenance										
A H	Accounts louse accounts, gift	card and card a	iccount man	agement								

3. You will come to a screen alerting you to any cash management tasks that have not been completed.

If you have an open bank, pressing the Go to button to the right of it will take you to the open bank section so you can find out why the bank is not closed and take the appropriate action.

If you have a bank with a balance, pressing the Go to button to the right of it will take you to the open bank section so you can find out why the bank has a balance and take the appropriate action.

If you have an employee you need to pay tips to, pressing the Go to button to the right of it will take you to the employee tips section so you can pay out the tips before closing all tills.

If you have 1 employee still clocked in, that is normal since you are clocked in. If you have more than 1 employee clocked in press the Go to button to the right of it and you can clock the employee out.

YOU CAN STILL PRESS THE CONTINUE Z PROCESS BUTTON WITH OPEN ISSUES, ALTHOUGH WE ADVICE YOU CLEAR THEM UP FIRST.
SoftTouch POS	
7/13/03:18p Cassandra	3
Z Wizard Z Status	
	Z Oversiew
Confirmation	2 Overview
	Operation date: 7/11/2011 End of day classes at
	You have 1 open bank(s) Go to
	You have 1 bank(s) with a balance
	You have 1 employee tips(s) not paid Go to
	You have 1 employee(s) clocked in Go to
	You have some items that you may want to resolve before moving on with your end of day closeout procedure,
	if not the system will automatically handle those items for you if you continue.
<. 9 Canc	Continue Z Alert Shutdown Refresh
Sales Canc	Process Shutdown Stations Overview

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5. From here you can Continue Z Process, Alert Shutdown, or Shutdown Stations.

16.1 Continue Z Process

The **Z** Out procedure will allow you to finalize the days transactions, settle your credit card batch, run reports on today's business and clear totals to prepare for tomorrow's business.

Continue Z Process Procedure

1. Press the **Manager** icon at the top of your screen.



2. Press the **Z Out** *Z* out system wizard icon.

SoftTou 6/07.06:350	Calc Drawer History Info Counter	Pick Up Bar Dining Employee Manager
0,010000		
₹Ž₹	General Functions Set Op date, change employee, launch backoffice, system reset	System alert management
	Reports Print reports	Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
«	Journal Daily transactional journal	Yime Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
務	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
•	Customers & Loyalty Customers and loyalty maintenance	
A	Accounts House accounts, gift card and card account management	



3. You will come to a screen alerting you to any cash management tasks that have not been completed.

If you have an open bank, pressing the Go to button to the right of it will take you to the open bank section so you can find out why the bank is not closed and take the appropriate action.

If you have a bank with a balance, pressing the Go to button to the right of it will take you to the open bank section so you can find out why the bank has a balance and take the appropriate action.

If you have an employee you need to pay tips to, pressing the Go to button to the right of it will take you to the employee tips section so you can pay out the tips before closing all tills.

If you have 1 employee still clocked in, that is normal since you are clocked in. If you have more than 1 employee clocked in press the Go to button to the right of it and you can clock the employee out.

YOU CAN STILL PRESS THE CONTINUE Z PROCESS BUTTON WITH OPEN ISSUES, ALTHOUGH WE ADVICE YOU CLEAR THEM UP FIRST.

SoftTouch POS 7/13 03:18p Cassandre	a
Z Wizard Z Status	
Confirmation	Z Overview Operation date: 7/11/2011 End of day closeout
	You have 1 open bank(s) Go to
	You have 1 bank(s) with a balance Go to
	You have 1 employee tips(s) not paid Go to
	You have 1 employee(s) clocked in Go to
	You have some items that you may want to resolve before moving on with your end of day closeout procedure, if not the system will automatically handle those items for you if you continue.
Canc	el Continue Z Process Alert Shutdown Stations Refresh Overview

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- 5. If you have resolve all open issues or would like to continue anyway, press the **Continue Z Process** button at the bottom of the screen.



6. You will come to a Z Confirmation screen. To continue, press the Finalize Z button at the bottom of the screen.

SoftTouch POS 7/13 03:26p Cassandre	
Z Wizard Z Status	Z Confirmation
	You are about to Z your system (end of day), please select "Z Out" to proceed. Warnings
	 All open bank balances will get moved to your default bank. All clocked in employees will get clocked out.
Canc	Back Finalize Z

7. A Confirmation Dialog box will appear showing you your current operation date and the new operation date that will be set if you continue. Verify this is correct to prevent Z'ing out twice in one day.

(In the scenario shown, they were closed Tuesday and the operation date is advancing to today's date. Normally these dates will be one day apart. ex. Current Operation Date: 7/12/2011 "New" Operation Date: 7/13/2011)

Current Operati	ion Date: 7/11/201:
"New" Operatio	on Date: 7/13/2011
Are you sure yo	ou want to continue?
100	

8. When the Z process is complete, you will see a message at the top left indicating this and information on screen about the status of your Z. To back out of this screen, press the **Back** button at the bottom of the screen.

The Z process completed successfully...

(Press anywhere in this windows to close it)

Z Status

Sending request to the server to start the Z process Please wait... The Z is processing... 3:29:12 PM - STEP 1. Z for operation date 7/11/2011, Please wait... 3:29:16 PM - STEP 1. SUCCESS, New operation date set 3:29:16 PM - STEP 2. Closing current batch, Please wait... 3:29:16 PM - STEP 2. SUCCESS closing batch Do not forget to balance your merchant batch totals with SoftTouch 3:29:16 PM - STEP 3. Printing report batch, Please wait... 3:29:17 PM - STEP 3. SUCCESS printing report(s) 3:29:17 PM - STEP 4. Moving history data, Please wait... 3:29:17 PM - STEP 4. SUCCESS History data 3:29:17 PM - STEP 5. Processing exports, Please wait... 3:29:17 PM - STEP 5. SUCCESS Export process 3:29:17 PM - STEP 6. Backing up data to automatic location, Please wait... 3:29:23 PM - STEP 6. FAILED Backup process Error backing up to media 3:29:23 PM - STEP 7. Sweeping database, Please wait... 3:29:24 PM - STEP 7. SUCCESS Sweep process 3:29:24 PM - Z Ended for operation date 7/11/2011



16.2 Alert Shutdown

The **Alert Shutdown** procedure will allow you to alert the other stations and then shut them down.

Alert Shutdown Procedure

1. Press the Manager icon at the top of your screen.



2. Press the **Z Out** *Z* out system wizard icon.

SoftTou 6/07 06:35p	Cassandra Calc Drawer History Info Counter	Pick Up Bar Dining Employee Manager
2	General Functions Set Op date, change employee, launch backoffice, system reset	Alerts System alert management
	Reports Print reports	Web/Internet Internet web browser
9	All Checks Overview Find, reopen, reprint, adjust payments, offline, voids	Tip Pools Tip pool close out
\$	Journal Daily transactional journal	Time Editor Time clock editor, tip fund editor & clocked in employees
	Banks (Tills/Pockets) Paid IN/OUT, refunds, \$ transfers, driver banks and balances	Employee Management Employee Shifts, Open Time Clocks
務	Bank & Employee Close out Employees and banks awaiting close out	Z Out Z out system wizard
	Charge Tip Verification Verify employee declared credit card tips	
•	Customers & Loyalty Customers and loyalty maintenance	
	Accounts House accounts, gift card and card account management	



3. You will come to a screen alerting you to any cash management tasks that have not been completed.

If you wish to alert the other stations and then shut them all down at once, press the **Alert Shutdown** button at the bottom of the screen.



4. The screen will display a beige pop up notification that your system will be shutting down soon and you should finish up and logout. The screen also displays an Information Dialog box indicating that a shutdown alert was sent to the stations. Press OK to acknowledge this message and clear it from the screen.

you System will You	tdown shortly, please complete	
(Press	here in this windows to close it)	
Confirmat	Z Overview Operation date: 7/13/2011 End of You have 1 open tips(s)	of day closeout Go to
	You have 2 open check(s)	Go to
	You have 1 open b Information Dialog Shutdown alert sent to stations.	Go to
	You have 1 bank(s You have 2 employ	Go to
	Qk	
	You have some items that you may want to resolve before moving on with your end of day closeout procedur if not the system will automatically handle those items for you if you continue.	e,
and the second	ancel Continue Z Process Alert Shutdown Stations Refresh Overview	

16.3 Shutdown Stations

The **Shutdown Stations** procedure will allow you to shut down the other stations.

Shutdown Stations Procedure

1. Press the Manager icon at the top of your screen.



2. Press the **Z Out** *Z* out system wizard icon.

SoftTouch	POS Calc	Drawer	History	Info	Counter	Pick Up	Bar	Dining	Employee	Mar	nager			
6/07 06:35p C	Cassandra							(4)		1	2)			
G Se	eneral Function et Op date, change em	ns iployee, laur	ich backoffic	:e, system	reset	91	Alerts System	alert mana	gement					
R Pr	eports rint reports						Web/II Internet v	nternet web brows	∋r					
S A Fi	II Checks Overv nd, reopen, reprint, adj	view just payment	s, offline, vo	ds		1	Tip Po Tip pool	pols I close out						
See J	ournal aily transactional journ	al				9	Time Time clo	Editor ock editor, t	ip fund edit	or & c	locked	in employ	ees	
B Pe	anks (Tills/Poc aid IN/OUT, refunds, \$	kets) transfers, dri	ver banks a	nd balance	es	*	Employe	oyee Ma ee Shifts, O	anagem pen Time (ent Clocks	3			
8 Er	ank & Employe mployees and banks a	e Close awaiting clos	out e out			2	Z Out Z out sys	stem wizaro	1					
	harge Tip Verif erify employee declare	ication ed credit car	d tips											
C.	ustomers & Log ustomers and loyalty m	yalty naintenance												
A He	.ccounts ouse accounts, gift car	d and card a	account man	agement										



3. You will come to a screen alerting you to any cash management tasks that have not been completed.

If you wish to shut the stations all down at once, press the **Shutdown Stations** button at the bottom of the screen.



4. The screen displays an Information Dialog box asking whether you wish to **Shut Down** or **Terminate** the stations.

Shutdown or Terminate?			1.0
	Shutt	Jown of Termin	late?

Shut Down -Terminate -

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