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Unresolved Credit Card

Open Check at Closeout

Reprint Closeout Report

Internet Down / Offline Credit Cards

Labor/Overtime Off for Employee

Credit Card Ran on Wrong Table

Run Yesterday's/Last Month's Z

Drawer Won't Open

Transfer a Check to Another Employee

Print Itemized Receipt Day After+

Station IP Not Found

Dongle Key Not Found

Operation Date is Off

Ring in Order

TO SEARCH THIS DOC: **CTRL + F**

Use 1 for login in training mode or your login number given.

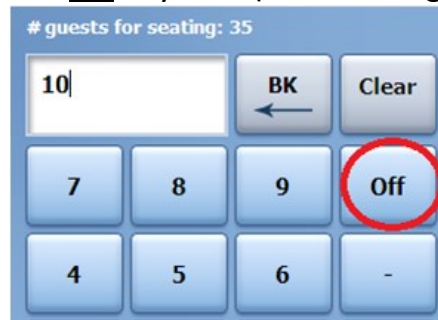


Go to Dining at top

(top bar)

Select Table > Enter Guest Count

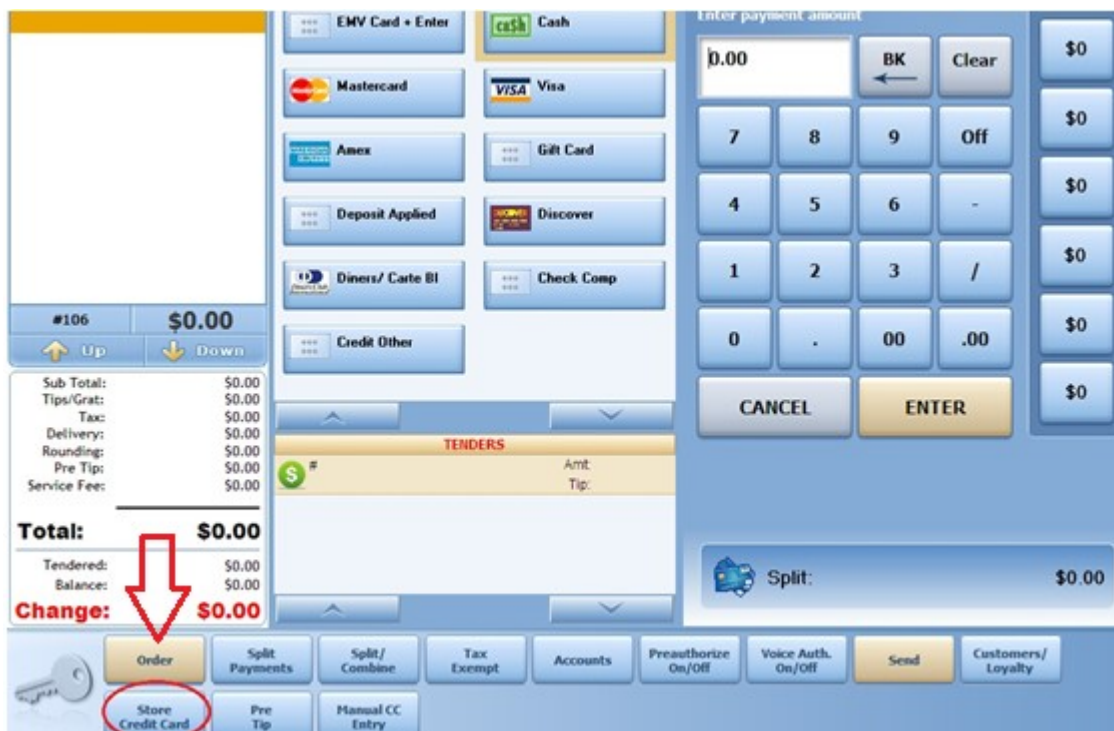
*for greater than 10, hit the On key first (it will change to Off) – then # + Enter



Move a Table – To move an entire table and its order(s), use the Seating -> Seating button on the table layout screen (table/floor chart screen). Touch Seating > Seating, then current table, and finally touch the table they wish to move to.



Store a Bar Tab Credit Card – Start the check and immediately go into the cashout screen. Hit Store Card at bottom. Insert card into device. Remove card and hit the Order button at bottom to put in an item. On cashout, there will be a button that says Charge Card on File at top middle with credit card buttons.





Float List – The Float List is a way to ring in an order and not assign it to a table. Start a Floating Order by hitting New Order. See these orders in a list under Dining Orders.

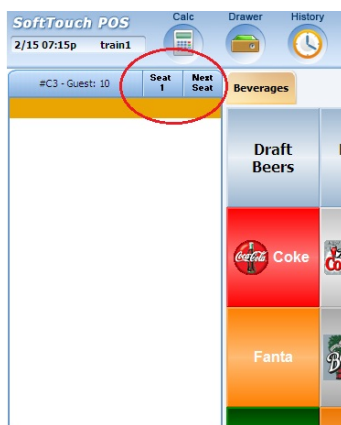
You can transfer a table into the Float List with Seating -> Float or move a Floating Order from the list onto a table with Float -> Seating.

New Table Order – This will allow you to start a new order on a table that still has a check on it. You may use this if you are teaming with someone in a section and they haven't had time to close out the check to cash yet.

Ring in by Seats

Ring up food and drinks by the seat to make it faster to split

– hit Next Seat to move on. Hit Seat button to pick a seat number to add items to.



(top left)



Hit Send (bottom right)

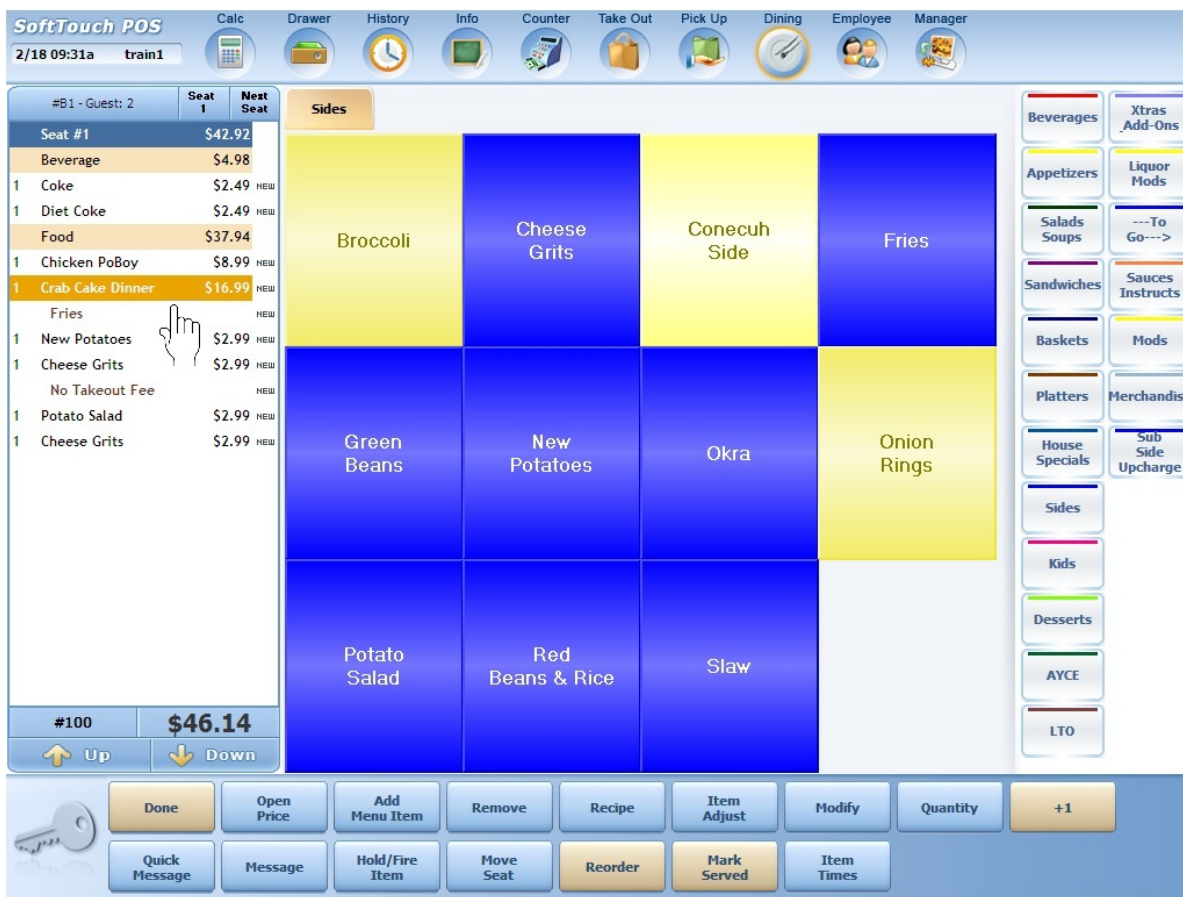
* Print and Cash Out both also send the order to the kitchen

Use the Key to log out – make this a habit to avoid someone ringing in an order under your number before the auto timeout.



****Before Send**

Touching items on the check while inputting in an order brings up different function buttons at the bottom that will manipulate just that item you have selected. These items can only be performed before sending.



Open price - *Requires Manager – To change the price of an item temporarily for this check only, touch the item on the check and hit Open Price at bottom – type in the price with the decimal. **Can be performed after Send.**

Remove Item – You can remove an item on a check if you make a mistake *before* it is sent without manager approval. To do this, touch the item on the check and then hit Remove at the bottom.

Item Adjust – To discount or surcharge a particular item on a check, touch the item on the check and hit Item Adjust at bottom. This will bring up a menu to discount or surcharge the item based on the Adjustments that are setup in the system. **Can be performed after Send.** (covered in *Adjustments (Discounts/Surcharges)* Section pg 21).

Quantity – To increase the quantity of an item ordered already on the check, touch the item on the check and hit Quantity. A keypad will display that will allow you to pick the quantity number desired. **note this will copy all modifiers attached to the item as well. **+1** increases the item quantity by 1.

Quick Message – This will display a custom list of modifiers messages setup in the Backoffice (ex. Dressing on Side, Don't Make, Allergies, Light Seasoning, etc...).

Message – This will allow you to type a custom message to modify an item.

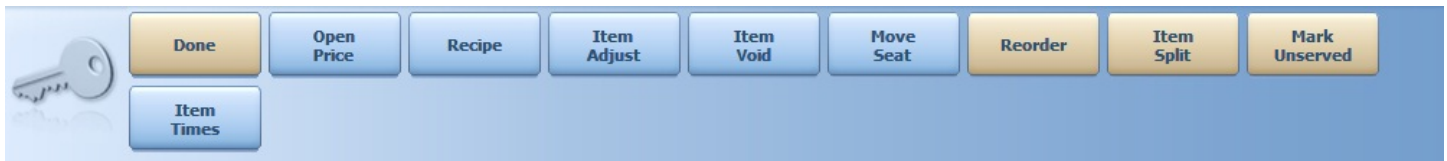
Hold/Fire Item – This will allow you to Hold the selected item from being sent to the kitchen with the rest of the items. Typically you would do this in the main screen outside of the item manipulation menu where the button is called Hold/Fire Items. This allows you to hit this button first and select multiple items.

Move Seat – If you need to change what seat an item is currently on, hit this button and a keypad will display that will allow you to pick the correct seat #. **Can be performed after Send.**

Reorder – This will allow you to duplicate an item and its modifiers on a check. Similar to Quantity and +1 before an order is sent but can also be used after an order is sent. This is handy for cocktails, beers, and wines. **Can be performed after Send.**

****After Send**

These items can only be performed after sending the check to the kitchen



Item Void – **Requires Manager Approval – If you need to remove an item from a check that has already been sent to the kitchen but has *not* been made yet, use Item Void.

Item Waste – **Requires Manager Approval – If you need to remove an item from a check that has already been sent to the kitchen but has been made yet, use Item Waste.

Item Split – If you need to split an item and its cost evenly amongst the guests at the table, use this function. It will split it amongst the first seats available and then you can use Move Seat function above if you need to change any of the split item's seats.

Move Seat – If you need to change what seat an item is currently on, hit this button and a keypad will display that will allow you to pick the correct seat #. **Can be performed before Send.**

Reorder – This will allow you to duplicate an item and its modifiers on a check. Similar to Quantity and +1 before an order is sent but can also be used after an order is sent. This is handy for cocktails, beers, and wines. **Can be performed before Send.**

Open price - *Requires Manager – To change the price of an item temporarily for this check only, touch the item on the check and hit Open Price at bottom – type in the price with the decimal. **Can be performed before Send.**

Order Entry Extras – Modifiers – *Before Send*

The screenshot displays the SoftTouch POS interface. At the top, there is a navigation bar with icons for various functions: Calc, Drawer, History, Info, Counter, Take Out, Pick Up, Dining, Employee, and Manager. Below this, the main interface is divided into several sections. On the left, there is an order summary table with columns for item name, quantity, and price. The items listed are: Seat #1 (\$27.99), Beverage (\$2.49), 1 Coke (\$2.49), Food (\$25.50), 1 Grilled Shrimp Tacos (\$11.75), and 1 Shrimp Platter (\$13.75). Below the summary, there is a section for 'Blackened' with 'Okra' listed. The main area is a grid of menu items under the 'Platters' category. The items are: Shrimp Platter, Whitefish Platter, Catfish Platter, Chicken Platter, Combo Platter (highlighted in blue), Ranch, Cocktail, Tartar, Boom Boom Sauce (with a dollar sign), Marmalade, and Honey Mustard. On the right side, there is a vertical menu with buttons for various categories: Beverages, Xtras Add-Ons, Appetizers, Liquor Mods, Salads Soups, ---To Go---, Sandwiches, Sauces Instructs, Baskets, Mods, Platters, Merchandise, House Specials, Sub Side Upcharge, Sides, Kids, Desserts, AYCE, and LTO. At the bottom of the interface, there is a row of buttons: Done, Open Price, Add Menu Item, Replace, and Remove. A key icon is also visible on the left side of this row.

Add Menu Item – This will pull up the modifier menu that the selected modifier was grouped in and allow you to add another modifier to this item.

Replace - This will pull up the modifier menu that the selected modifier was grouped in and allow you to replace the selected modifier with one from its group.

Remove – This will allow you to remove the selected modifier from the item.

Split Checks

While in an order, you can split or combine checks. It is best to ring in the order with the Seat method above. Split the check at the end before cash out. Use Split Seats and it will split the check by the seats you rang in. Then you may move single or multiple items to other checks or even whole seats with all of the food/drinks under them by touching the Seat # blue banner. To complete the process, hit the Print key (then Print All).

SoftTouch POS 2/17 03:42p Train1

Split Checks

#32 - Guest: 2	Seat 1	Next Seat
Seat #1	\$17.96	
Beverage	\$3.98	
1 Sprite	\$1.99	NEW
1 Hot Chocolate	\$1.99	NEW
Food	\$13.98	
1 Cheesy Bacon	\$7.99	NEW
1 Gravy Fries	\$5.99	NEW
#100	\$19.76	
Up	Down	

#32 - Guest: 1	Seat 2	Next Seat
Seat #2	\$16.97	
Beverage	\$1.99	
1 Coke	\$1.99	NEW
Food	\$14.98	
1 The Farm	\$8.99	NEW
Add Shrimp	\$4.00	
1 Fried Green Tc	\$1.99	NEW
#102	\$18.67	
Up	Down	

Step 2
touch anywhere on the check you wish to move the items to

Step 1
touch a single item or multiple items on any check to move to another

Result

#32 - Guest: 2	Seat 1	Next Seat
Seat #1	\$17.96	
Beverage	\$3.98	
1 Sprite	\$1.99	NEW
1 Hot Chocolate	\$1.99	NEW
Food	\$13.98	
1 Cheesy Bacon	\$7.99	NEW
1 Gravy Fries	\$5.99	NEW
1 Fried Green Tc	\$1.99	NEW
#100	\$19.76	
Up	Down	

#32 - Guest: 1	Seat 2	Next Seat
Seat #2	\$16.97	
Beverage	\$1.99	
1 Coke	\$1.99	NEW
Food	\$14.98	
1 The Farm	\$8.99	NEW
Add Shrimp	\$4.00	
#102	\$18.67	
Up	Down	

Print **Send** **Start Over** **New Check** **Remove Check** **Select All** **Unselect All** **Split Seats**

Change Gratuity **Send & Cash Out** **Print & Cash Out**

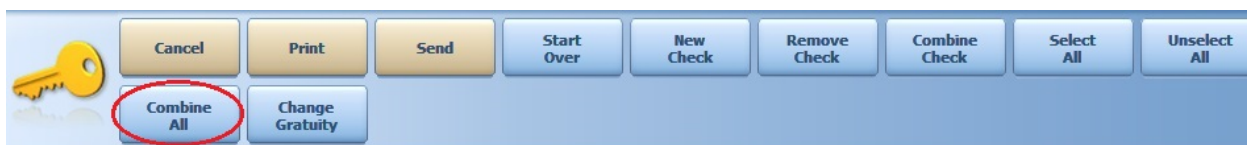
****Do First**

Combine Checks

You may need to recombine checks on a table or even combine checks that are on different tables. Start this process on the table selection screen. To combine checks on the same table, hit Combine Single Table at bottom. To combine checks on multiple tables, hit Combine Orders at bottom. Touch the table(s) you wish to combine. If selecting multiple tables using Combine Orders, you will need to hit Complete Combine after you have selected all the tables included.

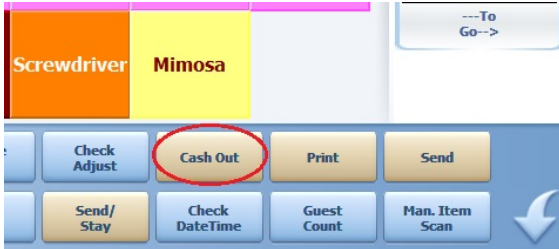


The combine checks screen looks like the split check screen above and functions exactly the same. Read above **Split Checks** section to see how to move items between checks. There will also be a Combine All button that will put all items from all checks on the first check shown.



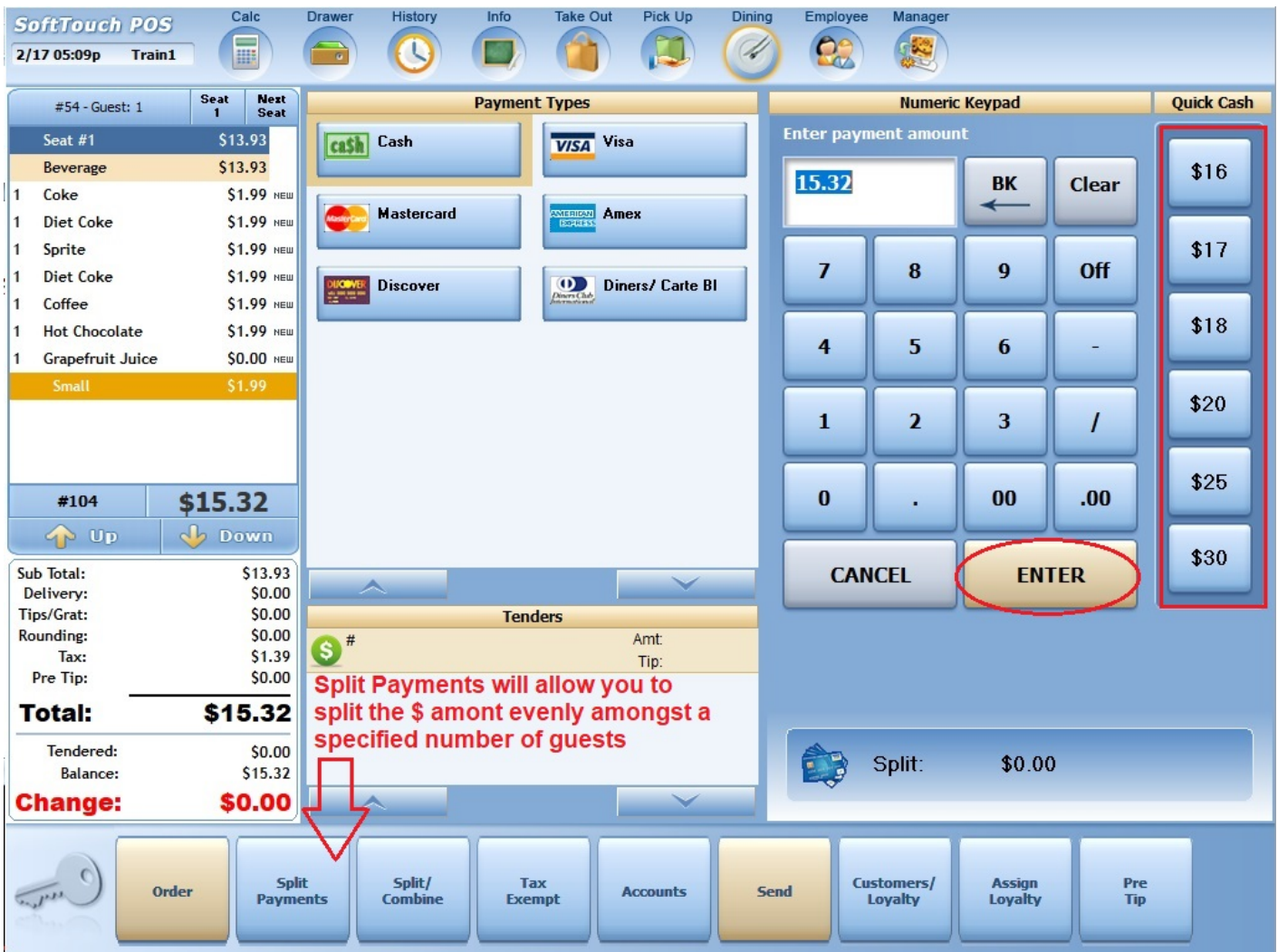
Cashout an Order

To Cash Out an order, open the check and hit Cash Out.



In the Cash Out screen, to use a credit card, you only need to swipe the card in this screen to close the order to that card. **If using EMV/Chip Card Readers, refer to the EMV Use section.

If using cash, you can use the quick cash amount buttons on the right or just hit enter for correct change



EMV Use

The image displays two screenshots of a SoftTouch POS interface. The top screenshot, labeled "Long Way", shows the payment screen with a total of \$2.63. The "Payment Types" section has "EMV CARD + ENTER" circled in red with a "2" next to it. The numeric keypad shows "2.63" entered, and the "ENTER" button is circled in red with a "3" next to it. A red text overlay says "3 Steps to trigger device". The bottom screenshot, labeled "EZ Way", shows the beverage menu screen with the "Fast EMV" button circled in red. A red text overlay says "1 Step to trigger device".

Long Way
3 Steps to trigger device

EZ Way
1 Step to trigger device

Use Fast EMV button while in the check to skip the cashout screen and trigger the device immediately to accept the card. This saves 3 button hits.

Manually enter a credit card - must enter the Cashout Screen

SoftTouch POS 1/18 08:20a Rtouchadr

Payment Types: EMV CARD + ENTER (2), Cash, Check, Gift Cert., Gift Card, Visa, Mastercard, Amex, Discover, Diners/ Carte BI, Check/Gift Card Comp, House Account

Numeric Keypad: Enter payment amount 2.63, CANCEL, ENTER (3)

Quick Cash: \$3, \$4, \$5, \$10, \$15, \$20

Sub Total: \$2.39, Total: \$2.63, Change: \$0.00

Manual CC Entry (1)

Manually Type in card number using the device

SoftTouch POS 1/18 08:23a Rtouchadr

Swipe Card Now... Confirm

Payment Type List: EMV CARD + ENTER, Cash, Check, Gift Cert., Visa, Mastercard, Amex

Hit this button to manually enter a credit card on the device

Swipe/Dip, Keyed, Cancel

total: \$25.00

Add a Tip

You can adjust tips as you go throughout the night or at the end of your shift. Go to Employee at the top and then My Checks, Open Tips, and Transfers. Touch each check and put the tip on it (NOT the total).

Employee Status
 Status: **III**
 Name: Train 1
 Current Job: Manager
 Current Shift: All Day Shift
 Schedule: -
 Addt Jobs:
 Pager ID:

My Checks, Open Tips & Transfers
 Open/close checks, open tips awaiting entry and check transfers

My Close Out
 Shift and till/pocket close out wizard

My Till Assignments
 My permanent, assignable and shared tills/pockets

My Tip Funds
 My tip funds participations

My Custom Programs
 My custom programs

End of Shift Closeout

check tips here before closeout

Navigation buttons: Punch Card, Additional Jobs, Employee Report, Charge Tips Report, Employee Tips, Driver Report, System Information, Small Buttons, Big Buttons, Check on Left, Check on Right, Employee Videos, SoftTouch QuickSupport

Open Tips # of open tips: 3

Click on any order below to enter a tip.

Drag a column header here to group by that column

Check #	Payment #	Account	Amount	Auth Code	Ref No	Check Type	Owner	Cashout by	Open Date Time	# Guest
103	9	Visa						Train1	2/17/2019 4:01:05 PM	1
100	10	Mastercard						Train1	2/17/2019 3:28:44 PM	1
102	11	Visa						Train1	2/17/2019 3:42:21 PM	1

Tip for payment #9: 5.00

Keypad buttons: BK, Clear, 7, 8, 9, Off, 4, 5, 6, -, 1, 2, 3, /, 0, ., 00, .00, CANCEL, ENTER

Adjust Incorrect Tip

This can be done from the Employee Menu. You can be logged in as a manager and adjust anyone's tip from here.

Go to Employee > My Checks, Open Tips, and Transfers and hit the Adjust a Tip button at bottom. It will ask for a Payment Number. This is *NOT* the Order number or check number. This is a separate number on the credit card receipt found in the middle of the top section. Enter the Payment Number. Enter the correct tip \$ amount.

SoftTouch POS 2/19 12:11p train1

My Open Tips | My Open Checks & Sales | All My Checks | Checks Awaiting Transfer

Open Tips ! Click on any order below to enter a tip. # of open tips: 0

Drag a column header here to group by that column

Check #	Payment #	Account	Amount	Auth Code	Ref No	Check Type	Owner	Cashout by	Open Date Time	# Gu
---------	-----------	---------	--------	-----------	--------	------------	-------	------------	----------------	------

Enter payment #

4 BK Clear

7 8 9 Off

4 5 6 -

1 2 3 /

0 . 00 .00

CANCEL ENTER

Restaurant Name
Street Address
City, State Zip
(000)000-0000

Date: 10/27/18 Time: 07:21 am
Order #: 102
DINING
Server: Train1
Guest: 1
Table #: 41
Name:
Payment #: 4
Payment Date Time: 10/27/18 07:21 am
Transaction ID: CH102
Cashier: Train1

2 DIET COKE \$5.98

Declare Cash Tips | Adjust a Tip

End of Shift Closeout

Closeout Report for Servers/Cash Drawers/Drivers/Bartenders

1. Goto Employee
2. Goto **My Closeout**
3. Closeout Shift & Till
4. Answer Yes
5. Enter Cash Tips
6. Clockout when it asks if you are ready or answer No if you still have side work

*** if you make an error entering cash tips you can redo this if you haven't clocked out - adjust with a - or +. Just rerun My Closeout

On the report that generates look for cash due in the following places for the various jobs:

Server/Driver: At the very bottom you will see **TOTAL CASH TO DROP** - this the \$ the server/driver owes the restaurant.

In the event that the server does not collect enough cash to cover their credit card tips, you will see **TIPS OWED FROM HOUSE** a few lines above the bottom of the report. This is owed to the server from the restaurant and is paid out from the end deposit. You can take it from another server's drop that has been turned in already. It will effectively come out of the total deposit for the restaurant.

Cash Drawer (Cashiers & Bartenders): In the middle of the report, there is a cash section. You will see Cash Payments and you may see Tips Paid if it applies and then a **Total Cash** figure. This is the amount that should be in the drawer over what you started with. There will also be a Total Cash to Drop amount at the bottom of the report for reference.

Small Paid Out chits: On each employee's closeout, Paid Out chit(s) will print. If only 1 paid out chit prints, the tips have been paid from the server's pocket or the bartender drawer and no further action is required. They will have a cash drop amount that is owed to the restaurant on their closeout report at the bottom. ***If 2 Paid Out chits print,*** the first is what amount of total tips was paid from the server's pocket or bartender's drawer. The 2nd Paid Out chit will tell you what the restaurant owes the server or bartender. In this case, Cash Due will be \$0 on the closeout report since the restaurant owes the employee.

Night Closeout Checklist

When closing out at end of night before running your Bal(X) report, you need to make sure everyone has run their My Closeout. This is very important to insure accuracy of the Bal(X) report. My Closeout tells the system to pay the tips from the respective drawer or server pocket.

To check for open staff banks/drawers, goto Manager > Bank Management > All Open Banks

Look for “Awaiting to be Committed” to the right of each open bank. This means that the My Closeout has been run for this Pocket or Drawer. You can see Burchfield has NOT run a My Closeout yet.

SoftTouch POS 5/12 12:00p fttouchadr

Bank Management | Bank Drops | Pay Out Employee Tips

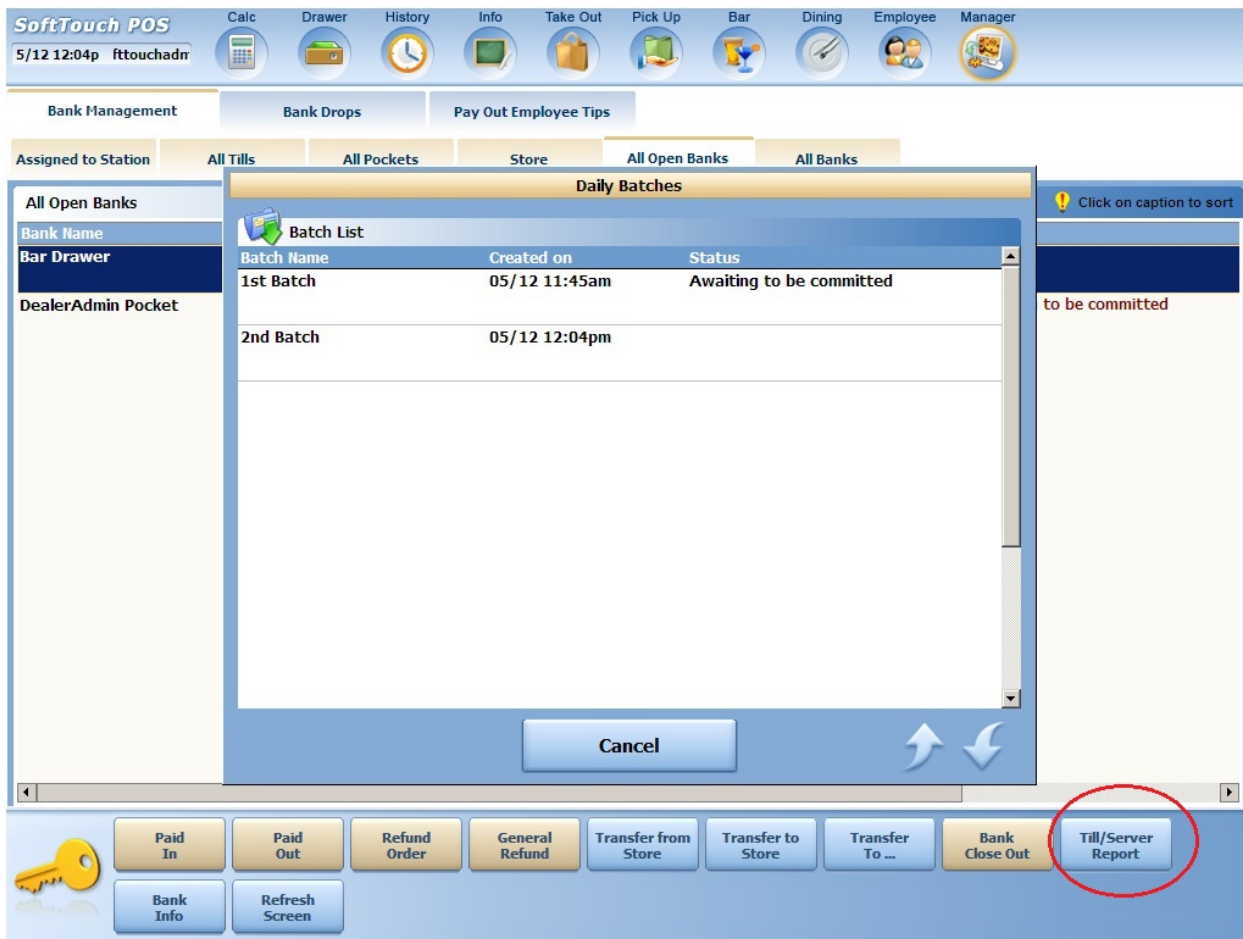
Assigned to Station | All Tills | All Pockets | Store | **All Open Banks** | All Banks

All Open Banks Click on caption to sort

Bank Name	Type	Total Cash	Total Other	Total	Batch	Status
Bar Drawer Inside	Till	-Hidden-	-Hidden-	-Hidden-	1st Batch	Awaiting to be committed
Britt , Darriell Pocket	Pocket	-Hidden-	-Hidden-	-Hidden-	AM Shift	Awaiting to be committed
Burchfield, Madelynn Pocket	Pocket	-Hidden-	-Hidden-	-Hidden-	AM Shift	
Davidson, Caroline Pocket	Pocket	-Hidden-	-Hidden-	-Hidden-	AM Shift	Awaiting to be committed
Hostess Drawer	Till	-Hidden-	-Hidden-	-Hidden-	1st Batch	Awaiting to be committed

Buttons: Paid In, Paid Out, Refund Order, General Refund, Transfer from Store, Transfer to Store, Transfer To ..., Bank Close Out, Till/Server Report, Bank Info, Refresh Screen

Physical Drawers (Bar Drawer & Host Drawer) can have multiple batches. This is like a server having an AM & PM Shift in a way. Each time you press My Closeout (or Bank Closeout if a manager runs the Drawer closeout from another computer under Bank Management), it creates a new batch and the drawer starts over or back at starting cash \$ amount. To check for physical drawer My Closeouts, you will need to highlight the drawer and hit Till/Server Report at bottom. If there are multiple batches of the drawer, a window will pop up that will show you which batches are Awaiting to be committed. Any batch not showing this has not had My Closeout run on it yet.



Reprint a Closeout Report

To reprint a closeout report if it gets lost or the printer runs out of paper etc, you can go to:

Manager > Bank Management > All Open Banks. Select the pocket or till and hit Till/Server Report button at bottom. Pick 40 Column and then Print at bottom.

Entire Store Report: Once everyone has run their closeouts and all drawers are closed, you can run the **Bal(X)** report which is the whole store report for the day.

Manager Functions

SoftTouch POS 2/18 11:00a train1

Manager

- General Functions**
Set Op date, change employee, launch backoffice, system reset...
- Web/Internet**
Internet web browser
- Reports**
Print reports
- Tip Pools**
Tip pool close out
- All Checks Overview**
Find, reopen, reprint, adjust payments, offline, voids
- Time Editor**
Time clock editor, tip fund editor & clocked in employees
- Journal**
Daily transactional journal
- Employee Management**
Employee Shifts, Open Time Clocks
- Bank Management (Tills/Pockets)**
Paid IN/OUT, refunds, \$ transfers, drops, driver banks and balances
- Stock Maintenance**
Stock Maintenance
- Charge Tip Verification**
Verify employee declared credit card tips
- Z Out**
Z out system wizard
- Customers & Loyalty**
Customers and loyalty maintenance
- Accounts**
House accounts, gift card and card account management
- Alerts**
System alert management

General Functions

General Functions

- Set OP Date
- Batch Close
- Enable Offline Credit Cards
- Reprint Last Check
- Change Employee
- System Information
- Launch BackOffice
- System Reset
- Manager Videos
- Alert Shutdown
- Shutdown Stations
- Remote Session
- Exit SoftTouch

Set Op Date – Only use this if you are closed one day a week or if you close for a period of time. You may have to set the correct date if you have been closed. Under Manager > General Functions.

Batch Close – Never hit this unless instructed. It will send your credit cards to the processor and then you can't add tips or make any adjustments to payments.

Enable Offline Credit Cards – Hit this button if your internet is down or you are having issues running credit cards due to connection, either network or with the processor's server. Under Manager > General Functions.

Reprint Last Check – Will reprint the last check/receipt.

Change Employee – This will allow you to impersonate someone else in the system. You will be logged in as this individual and can function as them to close out checks or any other function.

All Checks Overview – Reopening checks and adjusting payments

SoftTouch POS
2/18 05:10p train1

Calc Drawer History Info Counter Take Out Pick Up Dining Employee Manager

All Checks Open Checks Closed Checks Future Checks Offline Checks Open Tips

Only the last 50 checks are displayed at one time, the check # will duplicate for each additional payment made.

Drag a column header here to group by that column

Status	Check #	Check Type	Seating #	Sub Total	Delivery	Rounding	Tax	Gratuity	Tip Total	Total	Account	Payment #	Payment \$	Owner
Closed	100	Dining	B1	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				train1
Closed	101	Dining	B4	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				train1
Open	102	Dining	C2	\$14.94		\$0.00	\$1.12	\$0.00	\$0.00	\$16.06				train1
Closed	103	Dining	D2	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				train1
Open	104	Dining	A3	\$15.50		\$0.00	\$1.16	\$0.00	\$0.00	\$16.66				train1
Closed	105	Dining	D1	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				train1
Open	106	Dining		\$2.49		\$0.00	\$0.19	\$0.00	\$0.00	\$2.68				train1

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

Reprint Receipt Adjust a Tip Refresh Checks

If you have the check number or receipt, you can use the Find Check # button. Type in the Order # from the receipt and it will take you to the order. From here you can Reopen Check adjust an incorrect payment or add items to a closed check. If you don't have the check number, you can use the tabs at the top to sort the checks.

Open Checks are any checks that are still showing on tables or any credit cards that have been run on a check but that are still awaiting tip.

Closed Checks are any checks that have been fully closed to cash or credit card and tip applied.

Future Orders are orders that have been scheduled for a later date/time in the order screen or if you are using the online ordering, guests can select a time for pickup.

Offline Checks are checks that have had credit cards run on them while the Internet is down. If any are shown here, you can hit Process All Offline Cards at bottom. This is also done at Z automatically.

Reprint Receipt – Manager > All Checks Overview - This will reprint the cash or credit card receipt from any of the sections above

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.

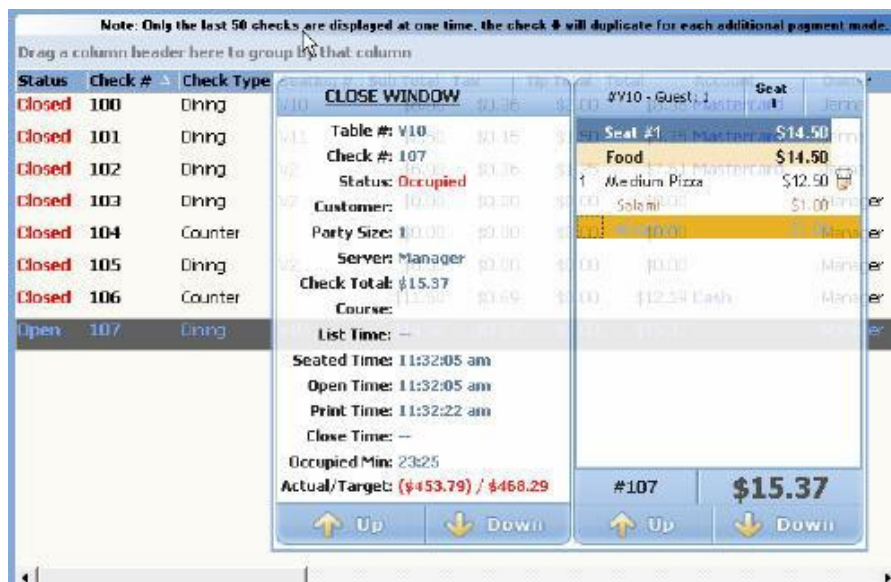
Highlight the check you wish to look at Press the Float Check On/Off button at the bottom of the screen



You will see the check detail for the selected check.



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



Group By

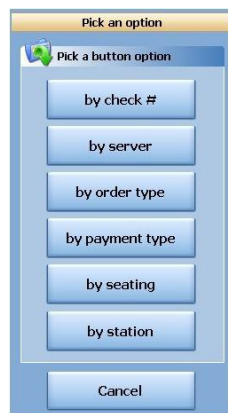
You may find the check you are looking for by pressing the **Group By** button and all orders will be sorted by the user ID under which the check was started.

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

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

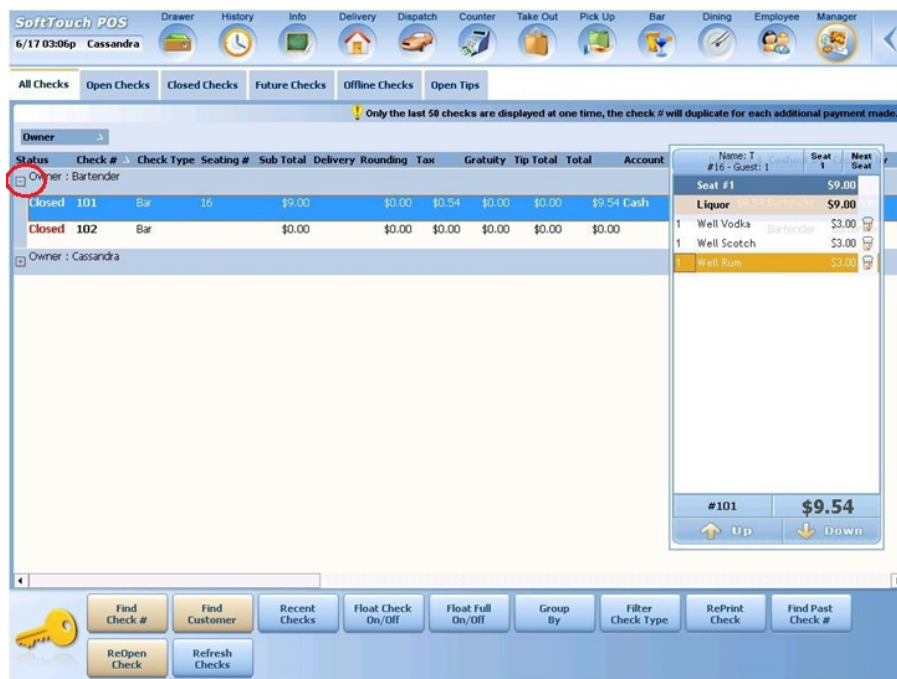


Choose the way you would like the orders grouped.



Press on the small + sign next to the grouping of checks you want to view and the group will expand.

You can now select the check you need.



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 #.

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



Choose which Check Type you would like to Filter.

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



ReOpen Check / Correct Payment – Manager > All Checks Overview

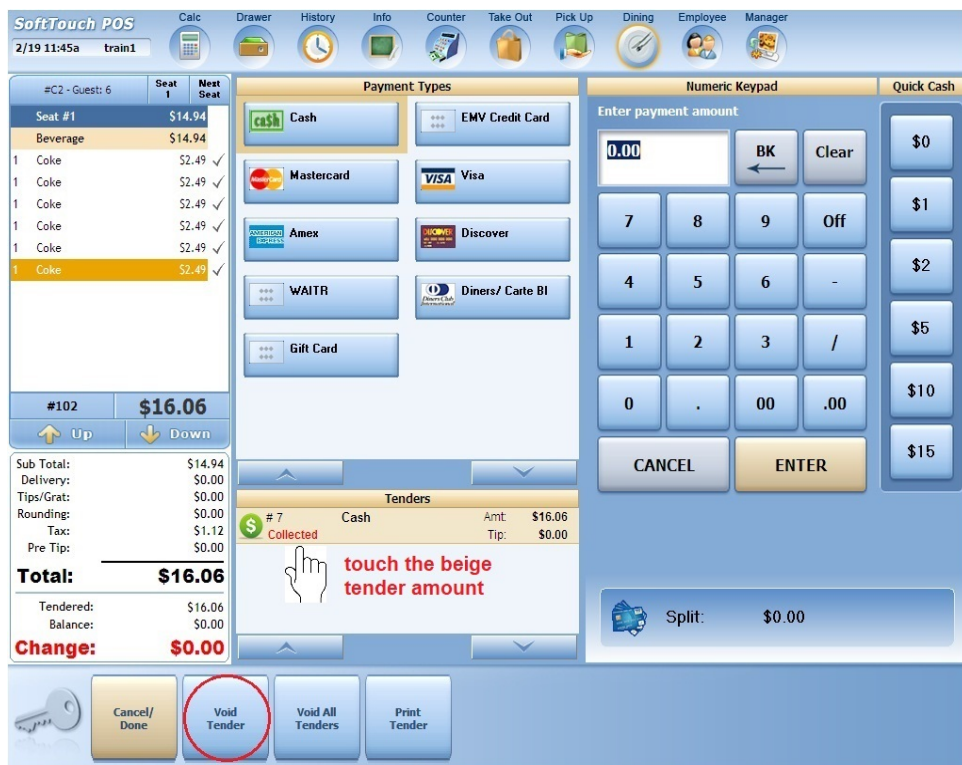
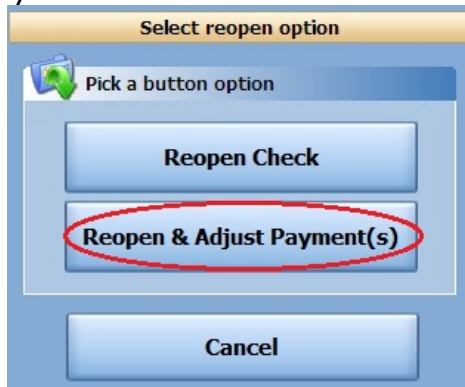
***Requires Manager Approval**

Highlight the check you want to re-open.

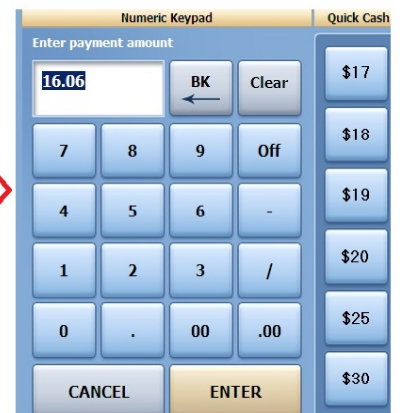
Press the **ReOpen Check** button.



You will be given the option to Reopen Check or Reopen and Adjust Payment – Pick Reopen and Adjust Payment as it will take you back into the check automatically



Once the tender is voided, the amount will reappear in the Tender Window and you can close the check back out with the correct method or go back into the order to change or add items to the check.



Touch the Tender Amount and hit Void Tender button at bottom

Resend an Order – if the kitchen printer is having issues, you may wish to resend an order to the kitchen. Goto Manager > All Check Overview > Find Check Number at bottom. Put in the check number and hit enter whereby it will take you to the Open Checks tab. The Resend Order button will be at the bottom.

History Usage – This is a nice shortcut to Reopen Checks to adjust payments or Reprint Receipts. It will show the last 5 orders by a server. Managers will see last 8 orders of entire restaurant.

SoftTouch POS
7/12 01:07p fttouchadr

Warnings & Reminders ChalkBoard Specials Alerts! Operati

Warnings & Reminders

Order History

#33 - Guest: 5	Seat 1	Open	#25 - Guest: 2	Seat 1	Open	#42 - Guest: 2	Seat 1	Closed
Seat #1	\$35.88		Seat #1	\$17.94		Seat #1	\$11.96	
N/A Beverage	\$35.88		N/A Beverage	\$17.94		N/A Beverage	\$11.96	
1 Coke	\$2.99	✓	1 Root Beer	\$2.99	✓	1 Coke	\$2.99	✓
1 Coke	\$2.99	✓	1 Cranberry Juice	\$2.99	✓	1 Diet Coke	\$2.99	✓
1 Root Beer	\$2.99	✓	1 Cranberry Juice	\$2.99	✓	1 Cranberry Juice	\$2.99	✓
1 Root Beer	\$2.99	✓	1 Pineapple Juice	\$2.99	✓	1 Root Beer	\$2.99	✓
1 Root Beer	\$2.99	✓	1 Pineapple Juice	\$2.99	✓	Seat #2	\$14.95	
1 Root Beer	\$2.99	✓	1 Pineapple Juice	\$2.99	✓	N/A Beverage	\$14.95	
1 Root Beer	\$2.99	✓	Seat #2	\$14.95		1 Lemonade	\$2.99	✓
1 Root Beer	\$2.99	✓	N/A Beverage	\$14.95		1 Orange Juice	\$2.99	✓
1 Root Beer	\$2.99	✓	1 Chocolate Milk	\$2.99	✓	1 Milk	\$2.99	✓
#102	\$45.93		#101	\$36.18		#100	\$29.60	
Up	Down		Up	Down		Up	Down	

Close Reopen Check Reprint Receipt Credit Tips

Void Order – Manager > All Checks Overview *Requires Manager Approval

You can Void Order completely from the All Checks Overview menu under the Manager menu. The same rules apply to order voids as do item voids.

Void Order – Use this option if the food or drink has *NOT* been made

Void Waste – Use this option if the food or drink has been made

This can also be done within a check and Void Order/Waste will be one of the function buttons at the bottom.



*****If there is any payment including a credit card, using either of these will also Void and Refund that payment**

The screenshot shows the SoftTouch POS interface. At the top, there's a status bar with 'SoftTouch POS', date/time '2/19 12:36p', and user 'train1'. Below that are icons for Calc, Drawer, History, Info, Counter, Take Out, Pick Up, Dining, Employee, and Manager. A menu bar shows 'All Checks', 'Open Checks', 'Closed Checks', 'Future Checks', 'Offline Checks', and 'Open Tips'. The main area displays a table of checks with columns for Status, Check #, and Check Type. A 'Void Reasons' dialog box is open, listing reasons for voiding: Customer changed mind, Didn't like food, Food prepared wrong, Food was cold, Other, Out of item, REORDER, and Server rang wrong item. At the bottom of the dialog are 'Custom' and 'Cancel' buttons. The bottom navigation bar contains buttons for Find Check #, Find Customer, Recent Checks, Float Check On/Off, Float Full On/Off, Group By, Filter Check Type, Reprint Check/Receipt, Void Order, Void Waste, Resend Order, Edit Order, Adjust a Tip, and Refresh Checks. The 'Void Order' and 'Void Waste' buttons are circled in red.

Status	Check #	Check Type
Open	102	Dining
Open	104	Dining
Open	106	Dining

Void Reason
Customer changed mind
Didn't like food
Food prepared wrong
Food was cold
Other
Out of item
REORDER
Server rang wrong item

Individual Item Void * Requires Manager Approval – this is performed while in the check**

Item Void – **Requires Manager Approval – If you need to remove an item from a check that has already been sent to the kitchen but has *not* been made yet, use Item Void.

Item Waste – **Requires Manager Approval – If you need to remove an item from a check that has already been sent to the kitchen but has been made yet, use Item Waste.

The screenshot displays the SoftTouch POS interface. At the top, there is a navigation bar with icons for Calc, Drawer, History, Info, Counter, Take Out, Pick Up, Dining, Employee, and Manager. Below this, a header shows the current time (2/19 12:57p) and the user (train1). The main area is divided into sections: a table for the current order, a 'Beverages' section, and a 'Void Reasons' dialog box. The order table shows a total of \$14.94 for seat #1. The 'Void Reasons' dialog box is open, showing a list of reasons for voiding an item. The reasons listed are: Customer changed mind, Didn't like food, Food prepared wrong, Food was cold, Other, Out of item, REORDER, and Server rang wrong item. At the bottom of the dialog, there are 'Custom' and 'Cancel' buttons. The bottom of the screen features a toolbar with various buttons: Done, Open Price, Recipe, Item Adjust, Item Void, Item Waste, Move Seat, Reorder, and Item Split. The 'Item Void' and 'Item Waste' buttons are circled in red. A key icon is visible on the left side of the toolbar.

Seat #1		\$14.94
Beverage		\$14.94
1	Coke	\$2.49
1	Coke	\$2.49
1	Coke	\$2.49
1	Coke	\$2.49
1	Coke	\$2.49
1	Coke	\$2.49

Void Reasons

Void Reason List

- Customer changed mind
- Didn't like food
- Food prepared wrong
- Food was cold
- Other
- Out of item
- REORDER
- Server rang wrong item

Custom Cancel

#102 \$16.06

Up Down

Done Open Price Recipe Item Adjust **Item Void** **Item Waste** Move Seat Reorder Item Split

Mark Unserved Item Times

Check Adjust (Discounts & Surcharges) *Requires Manager Approval

-** this is performed while in the check

While in a check, you can discount or surcharge any complete order or individual item(s). At the bottom in the function buttons while in any order, hit Check Adjust. This will display a list of custom discounts and surcharges.

Also, there is an Open Adjust button. This will give 3 options.

1. Discount or Surcharge
2. %Percentage or \$Dollar Amount
3. Taxable or Nontaxable (**always nontaxable)

The screenshot displays the SoftTouch POS interface. At the top, there are navigation icons for Calc, Drawer, History, Info, Counter, Take Out, Pick Up, Dining, Employee, and Manager. The main area shows a beverage menu with items like Coke, Diet Coke, Coke Zero, Sprite, Lemonade, Dr. Pepper, Root Beer, Sweet Tea, Unsweet Tea, Gallon Tea, Coffee, Hot Tea, Juice, Red Bull, Water, Bottle Coke, Bottle Diet Coke, Bottle Coke Zero, Bottle Sprite, Bottle Dr. Pepper, Bottle Dasani, and Add Cherry. A sidebar on the right lists categories like Beverages, Appetizers, Salads, Sandwiches, Platters, Baskets, House Specialties, Sides, Kids, Desserts, AYCE, and LTO. At the bottom, there are two rows of function buttons. The first row includes Home, Go On, Cancel Order, Assign Name, Check DateTime, Check Adjust (circled in red), Print, Send, and Cash Out. The second row includes Suspend, Split/Combine, Change Menu, Clear Order, Fast Cash, Mod. Item Scan, Upsell Items, Send/Stay, and Dine In/To Go. A red arrow points from the 'Check Adjust' button in the first row to the 'Open Adjust' button in the second row.

Item Adjustment (Discount/Surcharge)*Requires Manager Approval

–** this is performed while in the check

Item Adjust– To discount or surcharge a particular item on a check, touch the item on the check and hit Item Adjust at bottom. This will bring up a menu to discount or surcharge the item based on the Adjustments that are setup in the system. **Can be performed before or after Send.**

The screenshot displays the SoftTouch POS interface. At the top, there are navigation icons for Calc, Drawer, History, Info, Counter, Take Out, Pick Up, Dining, Employee, and Manager. The main screen shows a check for #C2 - Guest: 6, with a total of \$16.06. The beverage menu is visible, with items like Coke, Diet Coke, Coke Zero, Sprite, and Dr. Pepper. The 'Item Adjust' button is circled in red, and a red arrow points to it. Below the main screen, there are two rows of adjustment buttons: the first row includes Done, Open Price, Recipe, Item Adjust, Item Void, Item Waste, Move Seat, Reorder, and Item Split; the second row includes Done, Open Adjust, 10% Discount, 25% Discount, Employee Discount, Item Comp, and Police/Fire Discount.

Edit Time Clocks – Manager > Time Editor

The screenshot shows the SoftTouch POS Manager interface. At the top, there is a navigation bar with icons for Drawer, History, Info, Delivery, Dispatch, Counter, Take Out, Pick Up, Bar, Dining, Employee, and Manager. The Manager icon is circled in red. Below the navigation bar, there are two columns of menu items. The left column includes: General 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), and Accounts (House accounts, gift card and card account management). The right column includes: Alerts (System alert management), Web/Internet (Internet web browser), Tip Pools (Tip pool close out), Time Editor (Time clock editor, tip fund editor & clocked in employees), Employee Management (Employee Shifts, Open Time Clocks), and Z Out (Z out system wizard). The Time Editor icon is circled in red.

Select Employee at bottom and pick employee from list

The screenshot shows a dialog box titled "Select Employee" with a yellow key icon. Below the dialog box is a window titled "Employees" containing an "Employee List". The list includes the following entries: Bartender, Bart; Bartender, Blade; Busboy, Busboy; Cashier, Carrie; Cory, Joe; Dealer Company, Dealer; Driver Last Name, Driver; and Employee, New. At the bottom of the window, there is a "Cancel" button and two circular arrows (refresh and back) icons, with the refresh icon circled in red.

A calendar will appear asking you to select the date.

Select punch card time

Today: 7/14/2011 BK Clear

Now: 12:36PM BK Clear

10 min 1 Day 7 8 9

15 min 2 Days 4 5 6

30 min 3 Days 1 2 3

45 min 4 Days 0 AM PM

60 min 5 Days CANCEL ENTER

July, 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 7/14/2011

You will now see a list of the employees punches for the day you select forward. Use the buttons at the bottom (Add In/Out – Edit Entry) to change or add in times for the employee. A calendar like the one above will appear for you to make the changes.

SoftTouch POS 7/14 12:39p Cassandra

Drawer History Info Delivery Dispatch Counter Take Out Pick Up Bar Dining Em

Time Clock Editor Tip Sharing Clock Editor

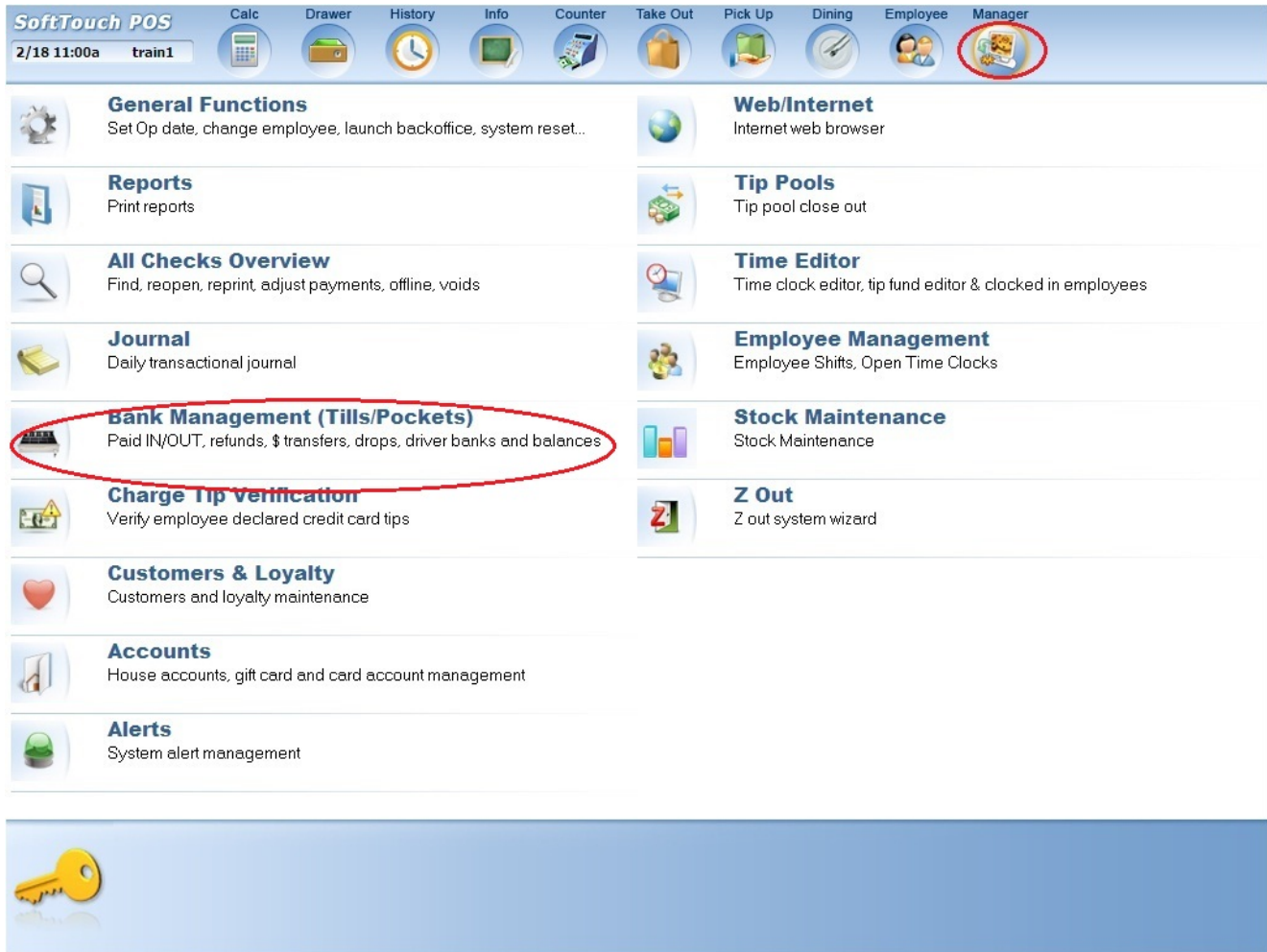
Employee: Eubank, Cassi, Dates: 7/10/2011 - 7/17/2011 7/14

Clock Date/Time	Type	Job	Operation Date/Time
7/11/2011 8:00:00 AM	IN	Manager	7/11/2011, 05:34pm-03:29pm
7/11/2011 1:00:00 PM	BREAK	Manager	7/13/2011, 03:29pm-
7/11/2011 1:48:00 PM	IN	Manager	7/13/2011, 03:29pm-
7/11/2011 7:00:00 PM	OUT	Manager	7/13/2011, 03:29pm-
7/13/2011 7:00:00 AM	IN	Manager	7/13/2011, 03:29pm-
7/13/2011 6:00:00 PM	OUT	Manager	7/13/2011, 03:29pm-
7/14/2011 7:00:00 AM	IN	Manager	7/13/2011, 03:29pm-
7/14/2011 12:39:00 PM	OUT	Manager	7/13/2011, 03:29pm-

Select Employee Punch Card Add In/Out Add Break/In Edit Entry Delete Entry Reset Timecards Refresh Timecards

Paid Ins/Outs & Refunds

Paid Ins/Outs and Refunds are done from Manager > Bank Management menu

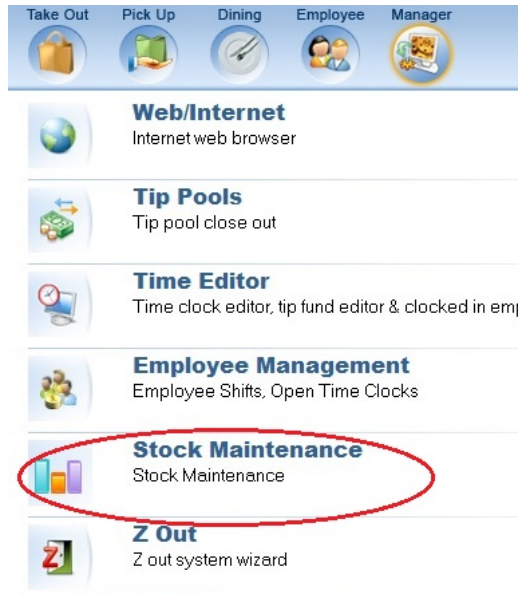


Refund Order – This option will bring up the order entry screen and let you ring up the order with tax in the negative \$. Upon cashout, a refund to cash or credit card can be issued.

General Refund – This option lets you put in an open \$ amount and refund to cash or credit card.

86 Item / Item Count

To 86 an item or to start a countdown for a limited number of units of a particular item use Stock Maintenance under the Manager menu. **Press the function button at the bottom first then hit the item.**



Modify Stock will allow you to specify a total of units remaining. This count will show on the button and adjust as items are rang in. Disable stock will remove the count completely and enable the item infinite.

86 Item prevents you from ringing in the item. Will show unavailable message on attempt.



Gift Cards – loading and checking balance

Goto Manager > Accounts

The screenshot shows the SoftTouch POS Manager interface. At the top, there is a navigation bar with buttons for 'Exit', 'Search Card Act.', 'Search Member', 'Search Account #', 'New Card Act.', 'Adjust +/- Account', 'Refund Account', 'Close Account', and 'De/Active Account'. Below this is another row of buttons: 'Account Name', 'Reconcile Account', 'Account History', 'Print Account', 'Print Invoice(s)', 'Delete Transactions', and 'Reconcile Transactions'. The main menu area includes icons for 'Calc', 'Drawer', 'History', 'Info', 'Counter', 'Take Out', 'Pick Up', 'Dining', 'Employee', and 'Manager'. The 'Manager' icon is circled in red. Below the menu are several functional categories: 'General Functions', 'Web/Internet', 'Reports', 'Tip Pools', 'All Checks Overview', 'Time Editor', 'Journal', 'Employee Management', 'Bank Management (Tills/Pockets)', 'Stock Maintenance', 'Charge Tip Verification', 'Z Out', 'Customers & Loyalty', 'Accounts', and 'Alerts'. The 'Accounts' category is circled in red. A yellow key icon is visible in the bottom left corner.

Hit **New Card Act.** to load a new card. On the next screen, swipe the gift card. Enter the card amount. On the next screen you can either hit Finish or if they are buying multiple card, hit Add New Card.

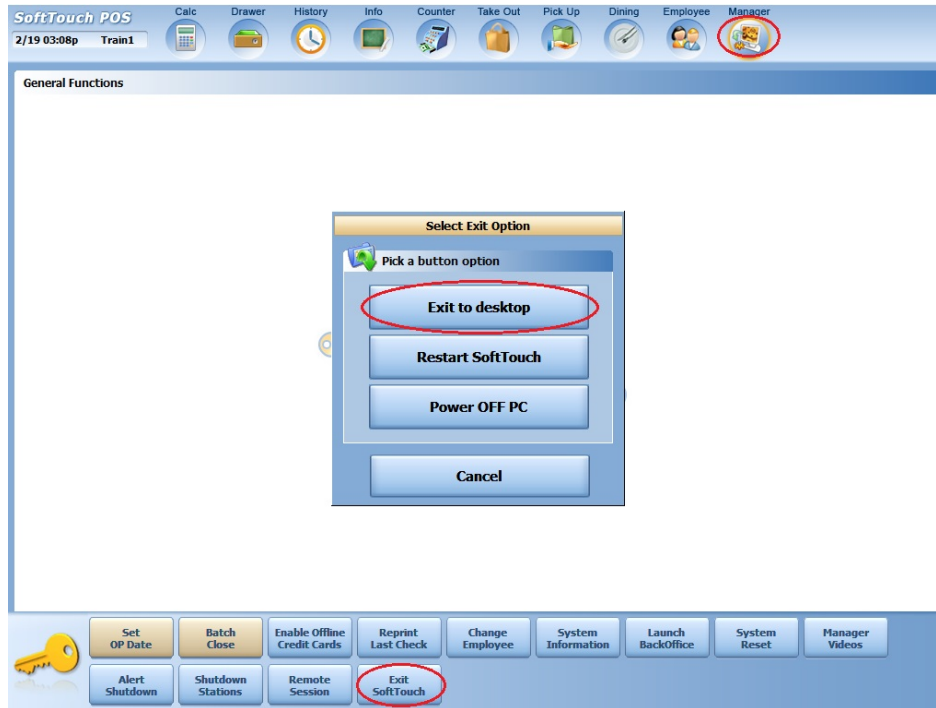
On the payment screen, ****make sure you select the credit card type.** Swipe credit card or .

This is a close-up of the navigation bar from the previous screenshot. The 'New Card Act.' button is circled in red. A red arrow points to the 'Reconcile Account' button. The other buttons in the bar are 'Exit', 'Search Card Act.', 'Search Member', 'Search Account #', 'Adjust +/- Account', 'Refund Account', 'Close Account', and 'De/Active Account'. Below the bar are buttons for 'Account Name', 'Reconcile Account', 'Account History', 'Print Account', 'Print Invoice(s)', 'Delete Transactions', and 'Reconcile Transactions'. A yellow key icon is visible on the left side.

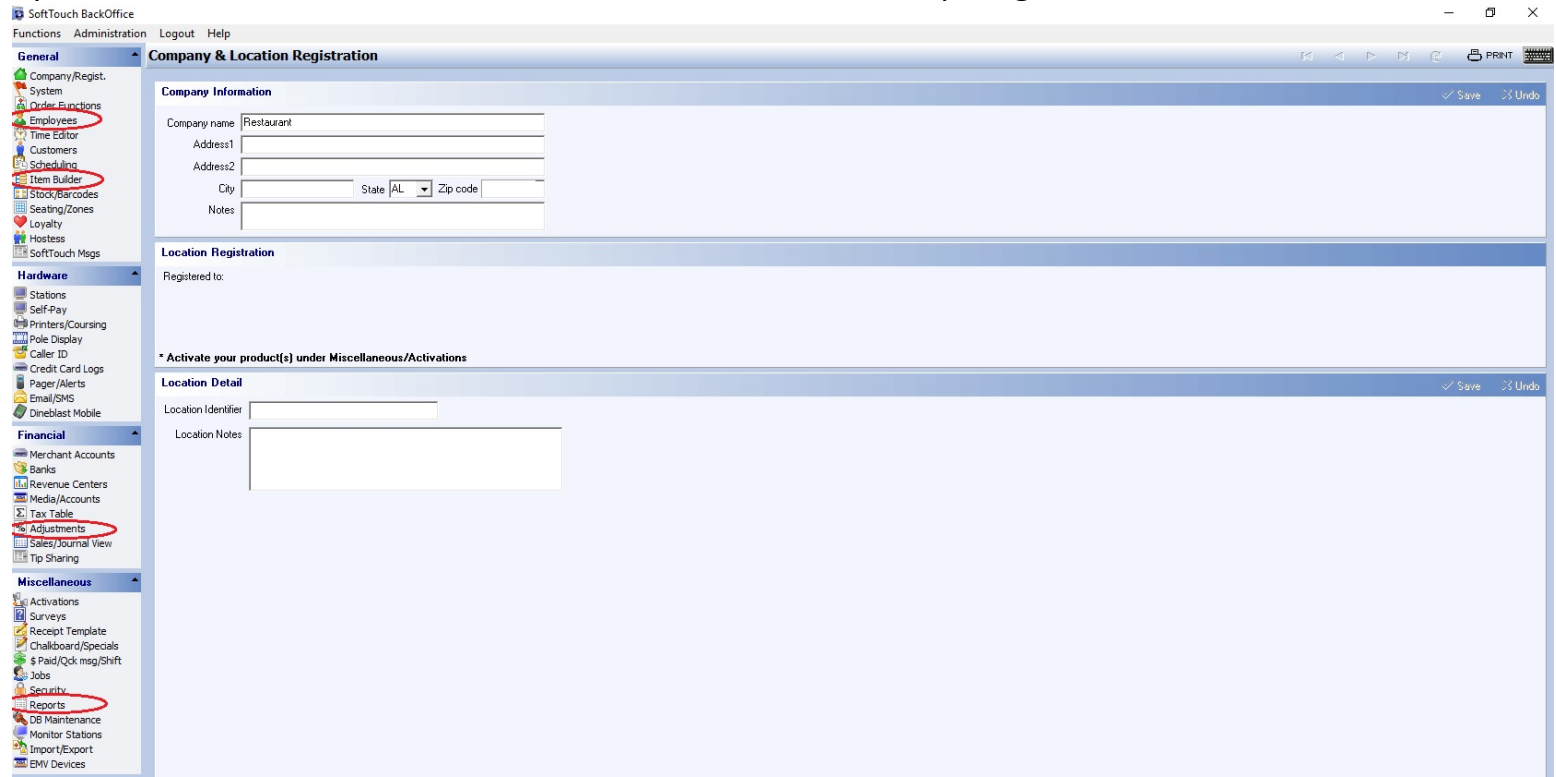
Use Gift Card – Using the swipe attached to the side of the computer screen (not the EMV Device), just swipe the card in the cashout screen. If you have issues here, touch Gift Card in the cashout screen and then hit Enter. Try swiping or keying in card # here.

Backoffice

To enter Backoffice from any terminal, exit the software by going to:
Manager > General Settings > Exit Softtouch > Exit to Desktop



Open Backoffice with the Softtouch Backoffice icon on desktop. Login.

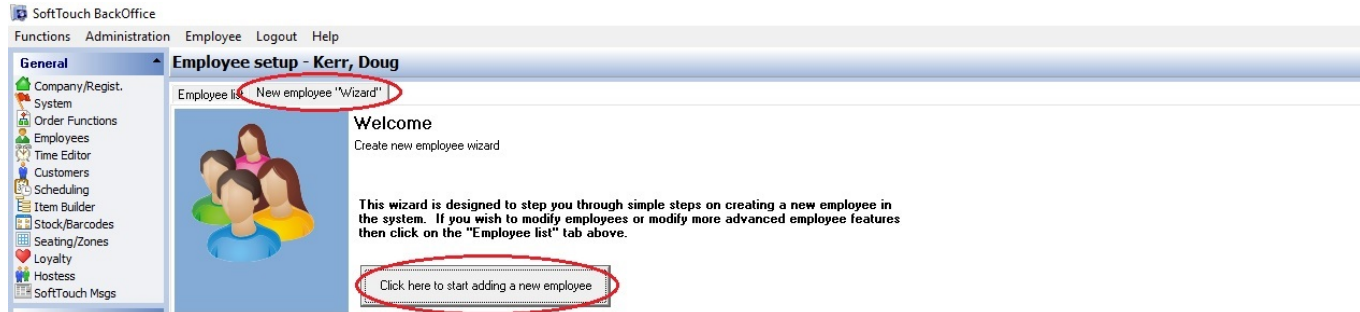


Adding Employees

To add an employee

Always use the New Employee Wizard (Top Tab)

******a gray check means unchecked



1. First and Last name only – Next button
2. skip page 2 – Next button
3. For the Global System ID use first name and last initial - on this screen if adding a manager, make sure Leave Cashout Money Under Original Employee is checked black - Hit Next button
4. **Set swipe id** (4 digit number they will use to login and place order) and register fingerprint if using – Next button
5. **Job Description** - pick job here **Security Group** - match the job unless kitchen/bus/food runner etc - then use Employee or Clock In/Out Only for the Security Group - Put in **Wage** as hourly – Next button
6. **The last screen will vary depending on what job you selected**...see below for the job types and what to do

****The next 4 pages will describe how to add drawers or pockets (server/waiter banks that turn in \$ after shift) to the respective jobs**

SERVERS

For Servers, it will ask you Self Banking.

After finishing adding a server, return the **Employee List (tab at the top). Goto their Job tab. On the right side you will see **Shifts**. Change (click in right side of box to activate dropdown) the All Day Shift to **AM Shift**. Hit the **+Add** under that and select **PM Shift** – **This is a very important step**. If you server works a double, this is what divides their 2 reports for the day. If you do not do this, both reports will run together and the night cash due will also include the morning cash due numbers.

The screenshot shows the 'Employee setup' window with the 'Employee list' tab selected. The 'Employee list' table contains the following data:

First Name	Last Name	User ID	Type
Lauren	Andrusko	Lauren100	SoftTouch Employee
Margery	Arias	Margery 86	SoftTouch Employee
Whitney	Armstrong	Whitney 85	SoftTouch Employee
Tess	Barberi	Tess 94	SoftTouch Employee
Holly	Barberi	Holly62	SoftTouch Employee
Angel	Bradley	Angel 81	SoftTouch Employee
Roderick	Brooks	Roderick 72	SoftTouch Employee
Cory	Broughton	Cory 74	SoftTouch Employee
Joshua	Bryant	joshua103	SoftTouch Employee
Nikki	Burk	Nikki61	SoftTouch Employee

The 'Employee job detail' tab is also visible, showing the 'Job Description' set to 'Server' and the 'Shifts' table:

Shift	Active
AM Shift	<input checked="" type="checkbox"/>
PM Shift	<input checked="" type="checkbox"/>

Red circles highlight the 'Employee list' tab in the top navigation and the 'Shifts' table in the job detail section.

BARTENDERS

For bartenders, it will have you add their drawer options on the last page. Select Permanent option and then drop down the drawer selection and pick the drawer that is correct. Ex. Bar Drawer – if there are multiple bar drawers, you can hit the **+Add** and select the other(s)

Hit Finish

Functions Administration Employee Logout Help

Employee setup - ghgh, test

Employee list New employee "Wizard"

Bartender banks

Bartender banks

Will this bartender be using a permanent till or will he/she assigning a till on start of shift?

Permanent or Assignable

Permanent

Assignable

Banks

If you're not sure which banks to use then you may want to pick an employee from the drop down and then click "use employee settings" to use that employees settings. This will configure all banks used by the selected employee.

Don't use unless you are sure

Banks
Drawer Name
Andrusko, Lauren Pocket
Arias, Margery Pocket
Armstrong, Whitney Pocket
Bar Drawer
Barberi, Tess Pocket
Barberi, Holly Pocket
Bradley, Angel Pocket
Bridges, Rachelle Pocket

If you have another bartender you have setup correctly, you can copy their settings by selecting them here

MANAGER

For managers, you should add all possible drawers and a pocket so that they can roam the floor and assist with cashing out a busy server's tables as well as open any drawer when they need to. Typically on the last page where the drawer is set up, it will create the server style pocket. You will then need to go back to the **Employee List** tab at the top and then to the **Tills/Pockets** tab. On the left you will see their Pocket. (If you do not see this, you can go over to the Job tab and hit the button at the bottom that says Click here to create and assign a "Pocket" for this job. (see pic)

Employee | Security | Finger Print | **Job** | Wage | Address | Phone numbers | Tills/Pockets | Scheduling | Tracking | Al

Employee job detail

Job Description: Bartender Active

Security Group: Bartender

Auto Login: None

Job Code 1:

Job Code 2:

Pickup all employee checks
 Assign RFID or swipe card on clockin
 Disable till closeout

Shifts

Shift	Active
AM Shift	<input checked="" type="checkbox"/>
PM Shift	<input checked="" type="checkbox"/>

+ Add - Delete ~ Save

Click here to create and assign a "Pocket" for this job

Now on the **Till/Pockets** tab, make sure you have their pocket shown on the left side and then hit the **+Add** above the list and select the Bar Drawer. If multiple drawers exist, repeat (i.e. Hostess Drawer etc.)

Functions Administration Employee Logout Help

Employee setup - Rhoades, Ryan

Employee list: New employee "Wizard"

Search for last/first/userid: Hide inactive employee

First Name	Last Name	User ID	Type	Current Employee Job List
Jane	Parker	Jane 67	Soft Touch Employee	Manager
Yorleni	Perez	Yorleni 76	Soft Touch Employee	
Jay	Putnam	Jayce 79	Soft Touch Employee	
Ryan	Rhoades	RyanR	Soft Touch Employee	
Davey	Rothe	Davey65	Soft Touch Employee	
Anna	Smith	Anna5	Soft Touch Employee	
Caitlin	Sosa	Caitlin98	Soft Touch Employee	
Collin	Summeral	Collin 70	Soft Touch Employee	
Jeff	Todd	JeffT	Soft Touch Employee	
Bobbie	Vaughan	Bobbie 92	Soft Touch Employee	

Employee | Security | Finger Print | **Job** | Wage | Address | Phone numbers | **Tills/Pockets** | Scheduling | Tracking | Alerts/Email/SMS | Notes

Permanently assigned tills/pockets

+ Add - Delete ~ Save X Undo

Assignable temporary tills, requires to be assigned on clockin

+ Add - Delete ~ Save X Undo

Copy Records Paste Records

Permanently assigned

- Rhoades, Ryan Pocket
- Bar Drawer
- Hostess Drawer

Assignable

Permanently assigned

Assignable

+ Add - Delete ~ Save

Click here to create and assign a "Pocket" for this job

Lastly, on their **Job** tab, check the box that says **Pickup all Employee Checks**. This allows them to server's checks and assist or make adjustments to them. **VERY IMPORTANT**

Employee | Security | Finger Print | **Job** | Wage | Address | Phone numbers | Tills/Pockets | Scheduling | Tracking | Alerts

Employee job detail

Job Description: Manager Active

Security Group: Managers

Auto Login: None

Job Code 1:

Job Code 2:

Pickup all employee checks
 Assign RFID or swipe card on clockin
 Disable till closeout

Shifts

Shift	Active
All Day Shift	<input checked="" type="checkbox"/>

+ Add - Delete ~ Save

Click here to create and assign a "Pocket" for this job

HOSTESS

If your hostess takes to go orders or puts in orders and receives payments at all, use the following guidelines to set them up:

*If you have them at a physical drawer, set them up like a bartender above. You can use Hostess for the Job Description and Bartender for the Security group (this will allow them to open the drawer etc) – they would, of course, only need the Hostess Drawer on the last page of the add employee wizard

*If they work out of a staff bank like a server, set them up like a server above. Use Hostess as Job Description and Server as the Security Group

If they do not take \$ or orders, you can just use Employee or Clock in/Out only for a Security Group

Add a Job to an existing Employee (or disable one)

Go to the employee and their **Job** tab. **Very important to Hit + Add in middle blue bar on far right first**- Form on left will blank out all items - put in Job Name and Security Group - make sure you assign whatever tills for the new job on Tills/Pockets. If you need to create a pocket for this job there is a button on the Job tab for that. If you get an error *Cannot delete this record...* hit the Undo button to right of the +Add or close Backoffice and reopen it. This means you did not hit +Add first and are trying to change an existing job. You cannot do that. If you need to **disable a job**, you can uncheck the Active box to the right of the Job Description. To select a job, its at top right
(Current Employee Job List)

First Name	Last Name	User ID	Type
Jane	Parker	Jane 67	SoftTouch Employee
Yorleni	Perez	Yorleni 76	SoftTouch Employee
Jay	Putnam	Jayce 79	SoftTouch Employee
Ryan	Rhoades	RyanR	SoftTouch Employee
Davey	Rothe	Davey65	SoftTouch Employee
Anna	Smith	AnnaS	SoftTouch Employee
Caitlin	Sosa	Caitlin98	SoftTouch Employee
Collin	Summerral	Collin 70	SoftTouch Employee
Jeff	Todd	JeffT	SoftTouch Employee
Bobbie	Vaughan	Bobbie 92	SoftTouch Employee

Employee job detail

Job Description: Server Active

Security Group: Server

Auto Login: None

Job Code 1:

Job Code 2:

Pickup all employee checks

Assign RFID or swipe card on clockin

Disable till closeout

Click here to create and assign a "Pocket" for this job

Shifts

Shift	Active
AM Shift	<input checked="" type="checkbox"/>
PM Shift	<input checked="" type="checkbox"/>

+ Add - Delete Save Undo

HIT 1st!!!

Change Login

Login to Backoffice – Go to Employees – find the employee to change login in the list. Go to their **Security** tab. Hit the Change Swipe ID button. Type new number in both blanks (swipe card here if using). Hit OK. To change **Backoffice password** for a manager, click Change Password button

SoftTouch BackOffice

Functions Administration Employee Logout Help

Employee setup - Kerr, Doug

Company/Regist. System Order Functions Employees Time Editor Customers Scheduling Item Builder Stock/Barcodes Seating/Zones Loyalty Hostess SoftTouch Msgs

Hardware Stations Self-Pay Printers/Coursing Pole Display Caller ID Credit Card Logs Pager/Alerts Email/SMS Dineblast Mobile

Financial Merchant Accounts Banks Revenue Centers Media/Accounts Tax Table Adjustments Sales/Journal View Tip Sharing

Miscellaneous Activations Surveys

Employee list

First Name	Last Name	User ID	Type
Train	1	Train1	SoftTouch Employee
Kiok	Employee	Kiok	Kiok Employee
Shane	Jones	softtouchadmin	SoftTouch Employee
Brienna	Kerr	Brienna	SoftTouch Employee
Doug	Kerr	DougK	SoftTouch Employee

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

Security

Active/Account Disabled

Is account locked:

System User ID: DougK

Manager Options

Leave cashout/payment amounts under original employee

Show bank detail amounts on screen

Other Options

Concurrent user logon

Backoffice Password

Change Password

Password expires: 3/30/1900

SoftTouch Swipe ID/RFID

Swipe id/RFID never expires

Swipe ID/RFID expires: Never

Change Swipe ID Change RFID

Clear Swipe ID Clear RFID

Menu Work

To update all of the stations with the changes you make, click the Update Stations icon (blue push pin) on the toolbar. No need to restart the software on the computers.



Change Menu Item Price

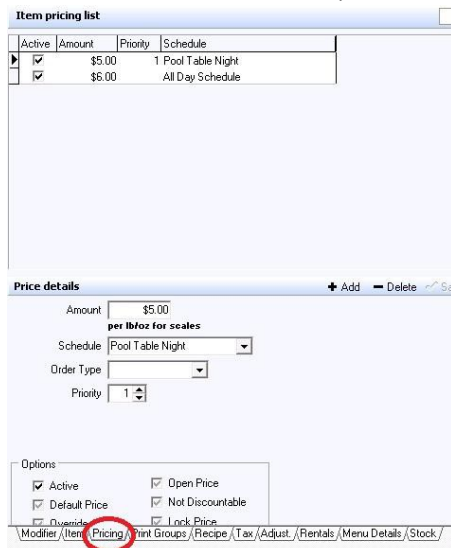
Under the **General** applet, click on **Item Builder**.



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.



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



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. Priority is important here. The lower the priority number will always take precedence over a higher number.

Create schedules in **Scheduling** in Backoffice

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.

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.

Item pricing list

Active	Amount	Priority	Schedule
<input checked="" type="checkbox"/>	\$5.00	1	Pool Table Night
<input checked="" type="checkbox"/>	\$6.00		All Day Schedule

Price details + Add

Amount
per lb/oz for scales

Schedule

Order Type

Priority

Options

<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Open Price
<input checked="" type="checkbox"/> Default Price	<input checked="" type="checkbox"/> Not Discountable
<input checked="" type="checkbox"/> Override	<input checked="" type="checkbox"/> Lock Price

\Modifier \Item \Pricing \Print Groups \Recipe \Tax \Adjust \Rentals \Me

Under **Item Pricing List** select the price you wish to change.

Under **Price Details** in the Amount field enter the new price and assign the correct schedule for the price. Click the **Save** button located at the top of Price Details section.

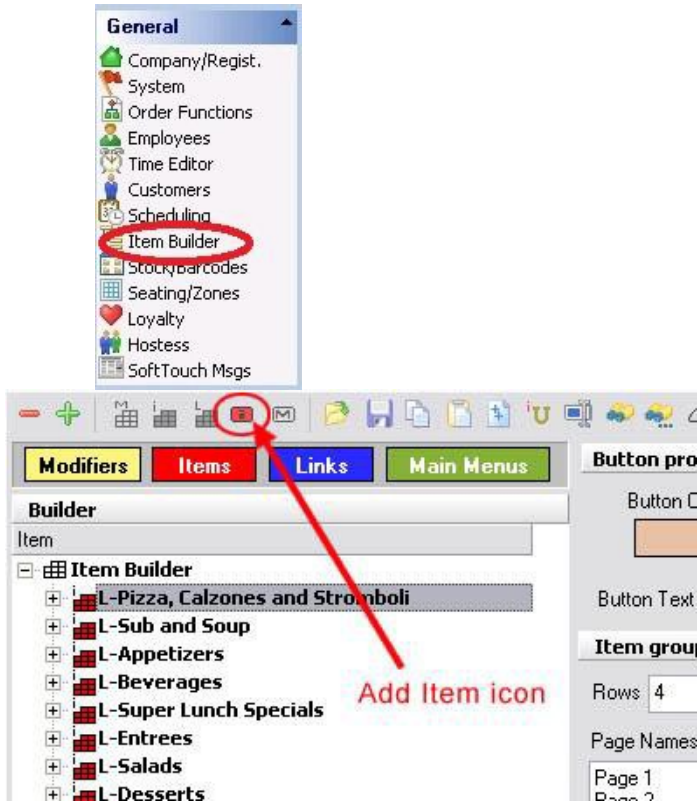
For make more price changes repeat steps 3 through 7. already



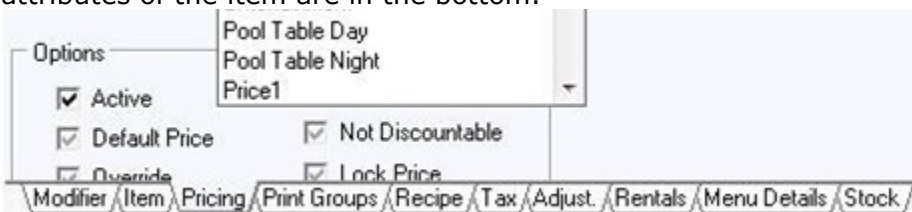
To update the stations with the changes you just made click the Update Stations icon (blue push pin) on the toolbar.

Add New Menu Item

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



**Go to item builder. Go to the red items group. Click the item group you want to add an item to – while the item group is highlighted click the little red i in the top toolbar. In the center window that appears, expand one of the item groups with the little + to the left (the one you are adding this item under is best). Select an item in the group that is most like the item you will create – type the name of your new item in the top bar and put the price in the right. Hit create at the bottom and your new item will be in the list. Move it up or down in the list with the blue arrows in the top toolbar the white box with arrow will move it to the top of the list. Click the item you created in the list and you can change the color and font on its item tab. Tabs to change attributes of the item are in the bottom.



copy item
right click on Item u wish to copy
Copy Node
right click on Group to paste into (ie. Appetizers)
Paste Node
Create New Item (Yes)
Type New Item Name
Goto new item and change price
move up to where you need it w blue arrow in top bar

Assign a Family Group to a Menu Item

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.

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.

Item properties

Item # 15632 Active

Item Name

Print Name

Receipt

Family

Priority

Barcode/PLU

Enable Scale

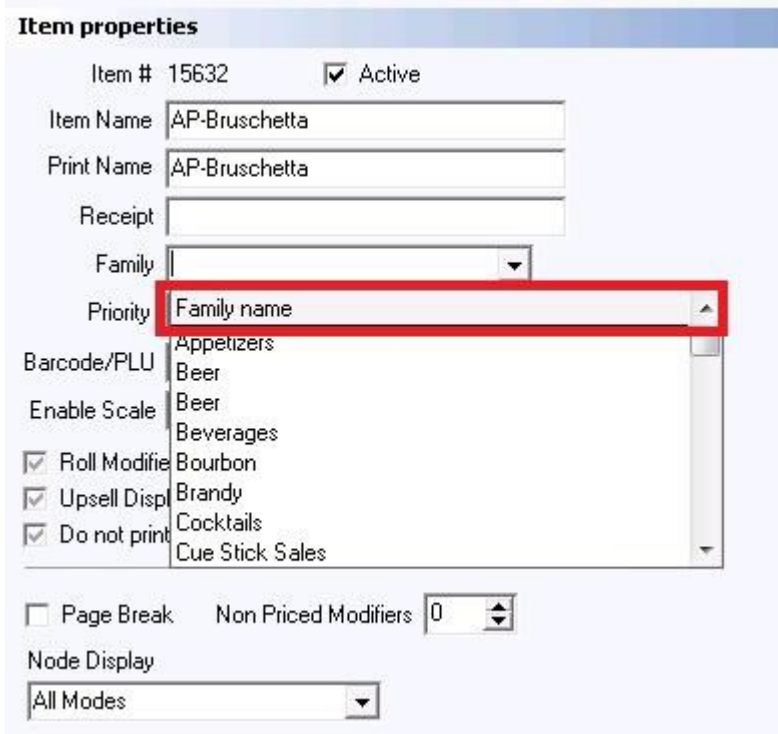
Roll Modified

Upsell Display

Do not print

Page Break Non Priced Modifiers

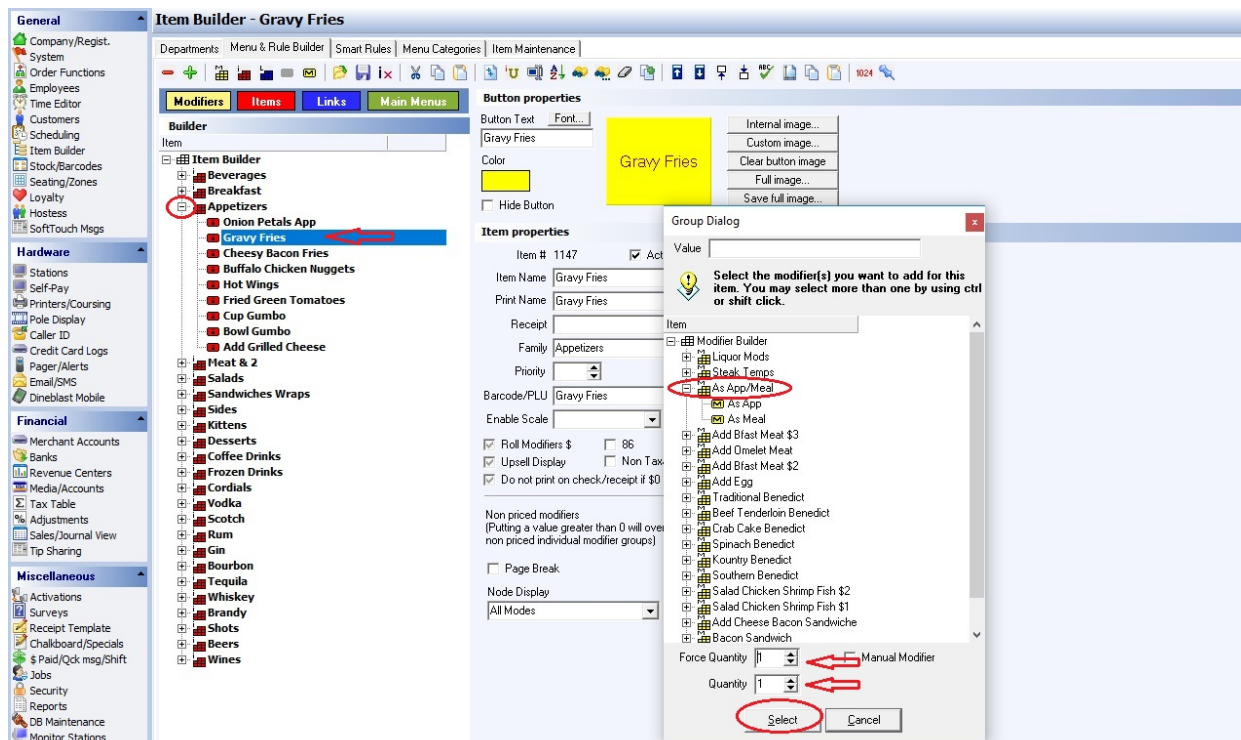
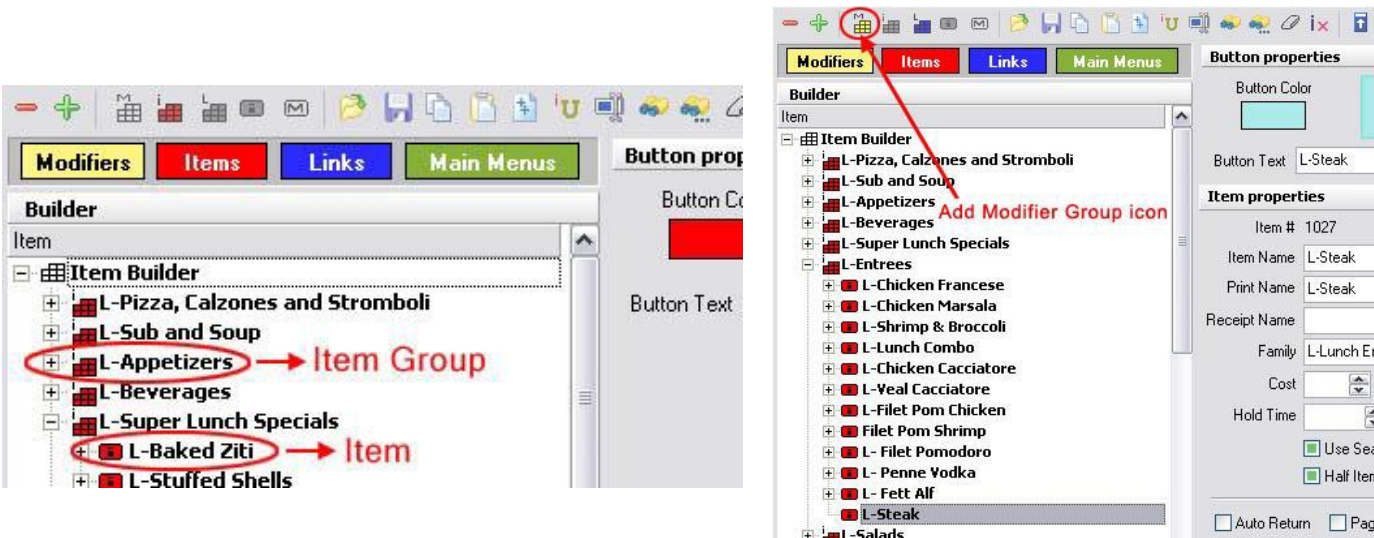
Node Display



Link Modifier Group to Menu Item

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.

Highlight the Item you wish to link a Modifier Group(s) to, then click the Add Modifier Group icon (yellow block with label M).



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

Highlight the group you wish to add and click the Select button.

Force Qty is the number of options they must select before the screen will move on

Quantity is the number of selections to make the screen move to the next screen

Backoffice Reports – Reports ran from the Backoffice are for historical reporting and also same day

Login to backoffice and go to reports. Expand the various groups and. All items in red are required to make the report run. Report Size: 80 is an office printer. 40 is receipt printer.

SoftTouch BackOffice

Functions Administration Logout Help

Reports - PTD/X/Daily Report

Report Runner | Report Configuration | Report Editor

Archives: Current * Only run "older" archives from a single terminal at a time

Report list

Description
Report Group : Accounts
Report Group : Adjustment
Report Group : Balance
Report Group : Checks
Report Group : Driver
Report Group : Employees
Report Group : Hours & Wages
Report Group : Other
Report Group : PTD
Transfer Report
Tax Exemption Report
Refund Report
Paid IN/OUT Report
PTD/X/Daily Report
Report Group : Rentals
Report Group : Revenue
Report Group : Sales
Report Group : Self-Pay
Report Group : Stock

Report parameters

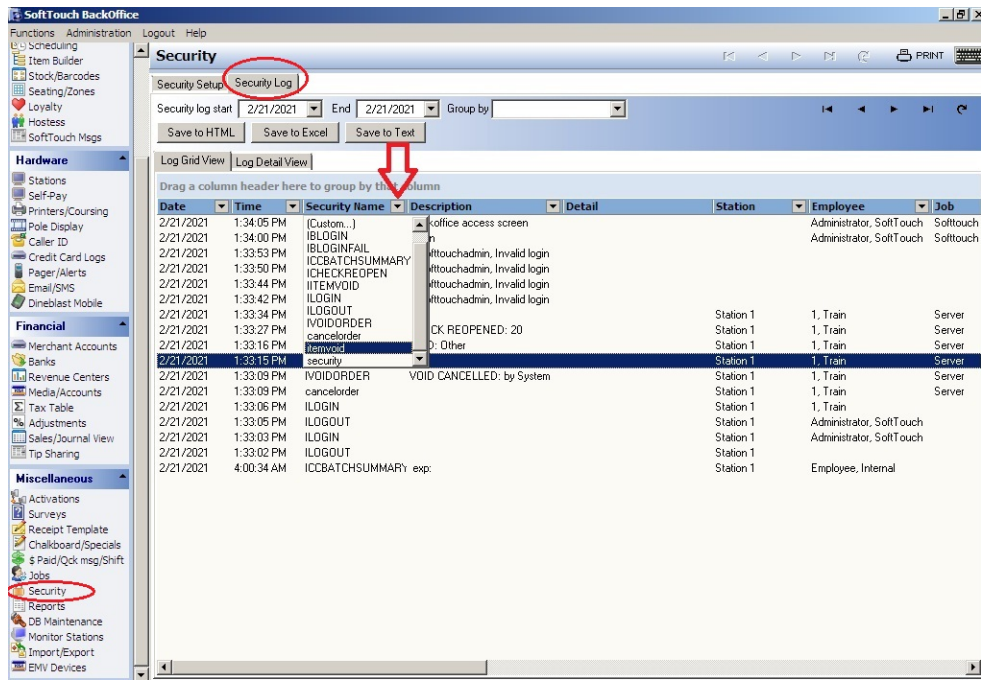
* Warning * Running large reports may slow down your clients and server performance during the report generation.
** Red are required parameters.

Report Size	80
Start Date	2/19/2019
End Date	2/19/2019
Report Type	PTD

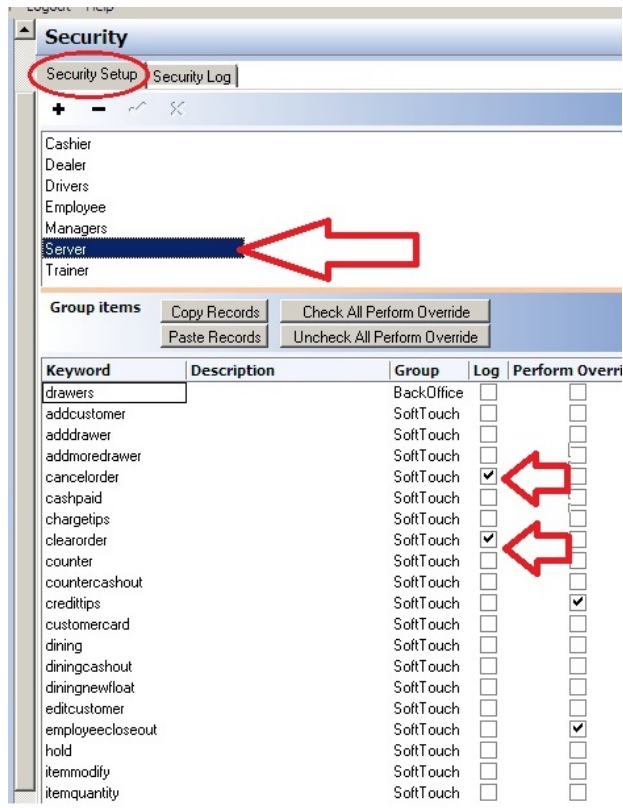
View report

Security Log Use

The Security Log in Backoffice is a way to track employee theft and see all activities logged. You can use the dropdown at the top of each column to show only what you select. You can see what security feature was used, on what check, at what time, and who authorized it.



You can add items to the log on the Security Log on the Security Setup tab. Select the job security and check the log box in the list below.



Troubleshooting & Tips

unresolved credit card

go into backoffice - goto credit card logs mid way down on left under hardware - goto unresolved trans. tab at top - click check payments tab - highlight transaction and hit resolve button

print server report

front end - manager > bank management > all open banks > highlight it - hit til/server report at bottom (40column)

labor/overtime off

u have to look at time editor in backoffice - find the person with affected job in last few days (always use start date of at least a week ago) with weird clock ins or outs- look at things like 2 clock ins or outs in a row or a clock in one day & a clock out next day, etc - click time with error and in very top bar where you see administration, etc click time editor - you will have edit, delete and so - make sure if adjusting a 4am clockout (person forgets and is clocked out on z) that you also change the date to previous day

credit card ran on wrong table - customer gone / to get full credit card #

with chip cards, you must contact your credit card processor for a full card number - send an email to help@bapos-main.on.spiceworks.com with a picture of the receipt and we will reply back within 24 business hours with the full card number or corrected \$ amount confirmation. Since this may be next day, so you will need to void the charge and rerun it when you get the card #

yesterday's or previous day's z report - monthly report

go into backoffice or front end under reports - goto reports on left towards bottom - hit + to left of ptd - highlight bottom report ptd/x/daily - change dates on right (start & end same for 1 day or date range if desired) - pick column size (40 for receipt/80 for big paper) - view report - print at top

offline credit cards:

Manager > General > Enable Offline Credit Cards (at bottom)

Pick 4 Hour Option

When Internet restored:

- Goto Manager - All Checks Overview - Offline Checks - Process

all Offline Cards button

- Goto Manager > General - make sure you hit Disable Offline Credit Cards at bottom. If you see Enable Offline Credit Cards you are online and no further action is required

open check at server/bartender closeout

could be from a transferred check or one that the payment was taken by someone else and its waiting on tip. either wait until everyone else closes out which will close out the check they are tied to (tip) or look in all check overview > open checks

there are 3 columns: owner - created by - cashout by

their name will be in one of those columns for one of the checks (most likely Cashout by) - take care of adding the tip to this check or close it out, and they will be able to run closeout - sometimes you may just need to go into the cashout screen of the check and hit Enter. If there is a \$0 balance, this will not affect the payment already on the check.

drawer won't open

check receipt printer for errors and paper - the cash drawer is plugged into the printer and opens via a quick print job sent to the printer and then to the drawer

print itemized receipt

login to backoffice - goto Reports > Checks > Check Detail - pick start and end date of the day in question. type in start and end check number (use the same number in both as the check in question) - hit view report - you can export it and email to the customer

transfer a check from one employee to another

Depending on security settings, a manager may need to swipe or enter their ID at various points during this process for an "override".

1. The employee who owns the check(s) to be transferred must log in to SoftTouch.
2. Press the Employee button (on the top).
3. Press My Checks, Open Tips & Transfers.
4. Press the My Open Checks & Sales tab.
5. Press the check you would like to transfer.
Notice that if the check has been paid but not tipped, its status will say "Awaiting tip".
6. Press the Move Order/Sales button (on the bottom).
**You may also choose to click the Move All Orders/Sales button to transfer all of this employee's open checks to another employee if the checks owner must suddenly leave for example.
7. Press the the employee on the list who you would like to transfer the selected check(s) to.
Only clocked-in employees are shown.
8. Press Yes to the confirmation dialog ("Are you sure you want to move the ownership and sales of the selected check to: [name]").
9. Press Ok

What Do I Do If I Am Getting A "Station IP address not found127.0.0.1" Error When I Try To Load SoftTouch?

Check your network. This usually means either the network switch/router is down or the network cable to the server is unplugged . On both end of an Ethernet cable right where it plugs into the computer or switch/router, you should always see a gree or green and orange light on or flickering. No light means no connection



Ethernet or network cable



examples of switches/routers

Dongle Key not found

this message means the date and time on the computer you are seeing this message on is incorrect or does not match the server computer's date and time in Windows. Exit softtouch and set the time in the bottom right corner of the computer desktop screen. For further support visit: <http://learning.softtouchpos.com>

Operation Date is Off

If the operation date is a day in the past (in red), it most likely has an unresolved credit card. See Troubleshooting item #1 on pg51. It could also just be that the power went out at 4am. Once all clear, Goto Manager > Z Out > Continue Z Process > Finalize Z..YES.

If the operation date is a day in the future, then someone ran a manual z and the system also ran its auto z at 4am. If no checks have been entered for the day, simply goto Manager > General Functions > Set Op Date. It will tell you if there are transactions. If it does, then you will have to disable the z for the night. Go into Backoffice > System > Z and uncheck the box that says Enable Auto Z. Set a reminder on your phone for the next morning to recheck this box. Your sales and cash amounts will run together for the next 2 days. Keep your paper reports and checkouts so you can subtract any cash and sales from the 2nd day to balance.

