



Training Manual

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XERA® POS Training Manual

PUBLISHED BY

Aldelo, LP

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Introduction

Congratulations on taking the major step of selecting XERA® POS as your new Point-of-Sale (POS) system. You will soon be up and running. You will see why XERA® POS is the new industry leader in point-of-sale software.

XERA® POS is one of the most feature-rich point-of-sale software packages available today. The designers of XERA® POS have spent years gathering input from business owners and managers like you as to what features they think should be included in a modern point-of-sale software application. These features have been incorporated into the all-new XERA® POS. It gives you the ability to automate many of the tasks associated with running your business. When properly installed and setup, it will help you run your table service, take-out, delivery, pizza making, bar, kitchen, cashiers, reservations, wait lists, scheduling, inventory, accounting, and more; and it will do so with a level of security greater than ever before.

This training manual is designed for use either by the end user of the software or by someone who is training someone else how to install and use the software. In it, we will walk you through the procedure of setting up a fictitious restaurant known as “Checkers.” As you follow along, you will not only see how we install and setup the software, you will also learn why many of these settings are important. This will undoubtedly give you a greater understanding of how the system works, enabling you to operate the software with confidence. As you gain more experience with XERA® POS, you will come to appreciate how well it complements your business. You will wonder how you ever got along without it.

We will start the tutorial with the configuration of the hardware and network software, followed by the POS software installation and configuration, and finally, the operation of the POS software. You should take the time to read the accompanying XERA® POS User Manual and XERA® POS Manager Manual first, and then read this training manual thoroughly before beginning the course. Many times, your questions are answered in the manual a few pages later. Reading these manuals ahead of time will help keep your questions to a minimum as you complete the tutorial, thereby allowing the content to be more fully absorbed.

So sit down, relax, and let us begin your trip into the world of XERA® POS.

The Structure of the Manual

This manual is divided into chapters in order to help you better focus on the key topics. You are not required to have prior knowledge of any point of sale software to use this manual. We are assuming that you are venturing into the world of automated POS solutions for the first time. This manual attempts to teach you everything that you need to know about using the XERA® POS software solution.

We strongly recommend that you install XERA® POS on a computer and try the procedures defined in the manual.

To help you read this manual faster, we have introduced some standard conventions to help you distinguish actions, names, and other topics from the normal content. The following are the conventions used in the manual:

Element	Meaning
<i>Italics</i>	Any reference to a control button or keyboard button that is selected by clicking on it is displayed in this manual in <i>italics</i> . Examples include hardware keyboard keys, Windows controls, buttons, radio buttons, checkboxes, menus, menu items, and dropdown list entries.
Capitalization	Additional references are displayed in this manual using capitalization of the term. Examples include text boxes, lists, screen names, references to other sections in this or other manuals, and any other additional features of the software.
“Quotes”	Text entered by the user or displayed on the screen appears in this manual in “quotes.” Examples include: “Pepperoni” displays on the screen. Enter “10” for the employee access code.
Navigation Path	The shorthand notation used to navigate through the software takes the following form: Name > Name > Name where <i>Name</i> can be a button, menu item, tab, etc. For example, Back Office > Setup > General Settings > Cash Trays represents directions to the window used to define your cash trays.

Getting Started

Comprehensive Demonstration

XERA® POS is a top-of-the-line point of sale system that has been designed to help you run your business with the greatest of efficiency. Once it has been properly installed and setup, XERA® POS allows you to automate many of the tasks required to operate a successful business.

The following figure displays the Login screen for the fictitious restaurant that we will setup in this tutorial (See Figure GS-1).

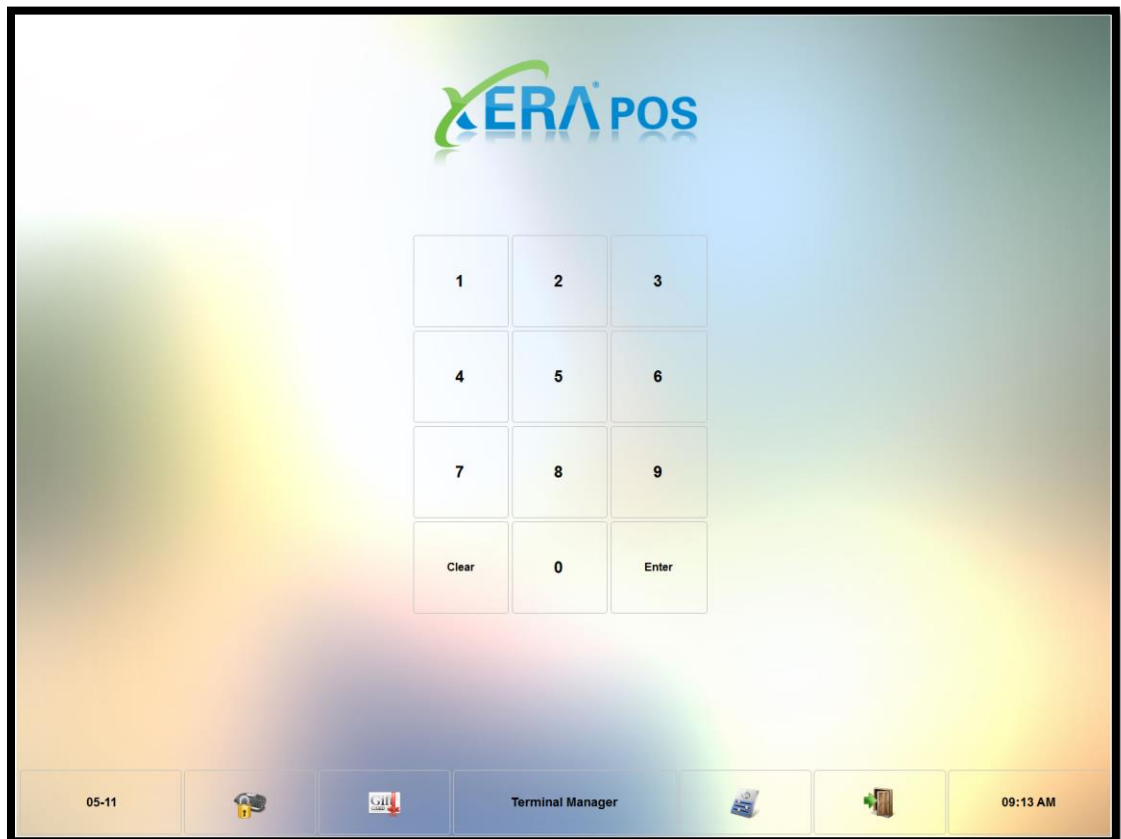


Figure GS-1

Upon completion of this tutorial, you will have learned how to setup and operate your own business with XERA® POS.

The XERA® POS Setup Process

OBJECTIVES

Upon completion of this tutorial, you will be able to:

- Setup and install your network hardware and software
- Install and configure the XERA® POS software
- Setup and install your Point of Sale (POS) hardware
- Operate the software

THE MAJOR STEPS

There are two major parts to setting up XERA® POS:

- Installing the hardware
- Installing and configuring the software

The following flow chart shows the steps required to setup XERA® POS (See Figure GS-2).

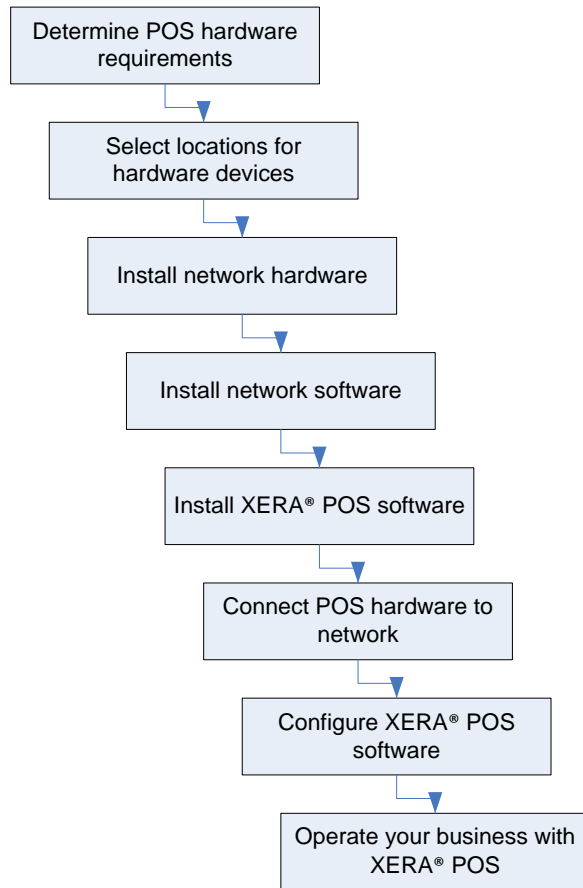


Figure GS-2

In this manual, we follow the sequential steps in the diagram above to setup our fictitious restaurant, “Checkers.” If you are setting up your own business as you follow along, substitute any references to Checkers in the settings with those of your own business.

Chapter 1 — POS Hardware Requirements

The first step when installing a POS system is to determine the types and locations of the hardware devices needed for the operation of your business.

Hardware devices can consist of:

- Server Computer
- Client Computers
- Touch Monitors
- All-in-One Terminals
- Printers
- Magnetic Stripe Reader (MSR) Devices
- Line Displays (also known as Customer Pole Displays)
- Cash Drawers
- Magnetic Ink Character Recognition (MICR) Devices
- Barcode Readers
- Weight Scales
- Caller Identification (Caller ID) Devices
- Coin Changers

For descriptions of some of the above devices and instructions on how they are installed, please see the chapter on POS Network Hardware Setup of the XERA® POS Manager Manual.

Chapter 2 — Hardware Device Locations

Imagine where you need your terminals placed and where you may need terminals placed in the future. Give this step considerable thought, as proper planning here can save much time and expense in the future when you expand your business.

Along with the terminals, consider where to place other hardware devices. Make a diagram of your business’s floor plan and mark the device locations on it (See Figure 2-1). This makes the next step in the process easier to complete.

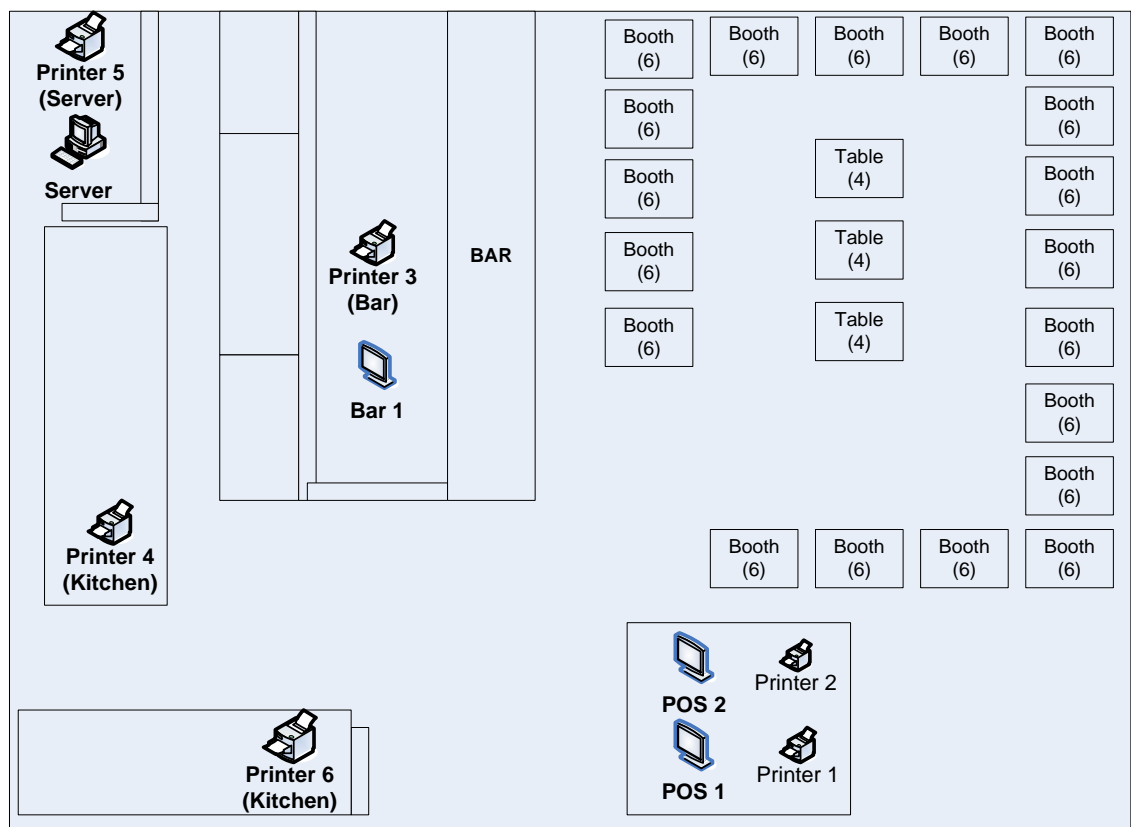


Figure 2-1

Chapter 3 — Network Hardware Installation

Take the diagram you made in Chapter 2 of your business's floor plan and figure out how to run the cabling for your network. Cable installation is best left to a professional, especially if there are walls, ceilings, or other obstacles to go through. If you want to install the cabling yourself, please read the chapter on Network Hardware in the XERA® POS Manager Manual thoroughly. It describes how to install the cabling and explains certain pitfalls to be on the lookout for.

After completing the installation of the cabling, make sure all your terminals have Network Interface Cards (NIC) installed in them so that they can connect to the network. This allows them to communicate with the server computer.

Finally, choose the type of device to use to connect all the cables from the individual devices to a central location so that each device will be able to communicate with the other devices. See the chapter on Network Hardware in the XERA® POS Manager Manual for an explanation of the pros and cons of Hubs, Switches, Routers, and Wireless Access Points before making your decision. For our Checkers restaurant example, we use a switch.

(Please note: Aldelo, LP does not provide any technical support whatsoever for help with installing cabling. Again, a professional installer should perform this task.)

Assembling Your Network

We assume you have already installed Windows on your terminals with the default configuration. This manual covers installation in Windows® 7 Professional Edition; however, in addition to Windows® 7 Professional Edition, XERA® POS may also be installed on computers running Windows® 8 Professional Edition, Windows® Server 2008, Windows® Server 2012, or POS Ready 7. The installation and operation of XERA® POS on computers running these other operating systems should be similar to that of Windows® 7 Professional.

Connect the terminals to the wall jacks installed previously by using patch cables. Connect the server computer and the system of jacks to the switch.

Chapter 4 — Network Software Configuration


For its operating system, our Checkers Restaurant uses Windows® 7 Professional. Windows® 7 comes in several versions but Aldelo, LP only recommends the professional edition of Windows® 7 for use with XERA® POS. There are many features in Windows® 7 Professional Edition that make setting up a network and configuring network settings a simple procedure.

The first thing to do to prepare the system for communication over the network is to change the workgroup name and computer name. This may be any name you wish. Most of the time, the business name, or an abbreviation of the name is used. The default workgroup name is WORKGROUP, which may be used if desired. We will use “CHECKERS” for our workgroup name. Computer names are usually “SERVER,” “POS1,” “POS2,” “POS3,” “BAR,” “TAKEOUT,” “DRIVETHRU,” etc., and, by common practice, are written in upper case characters.

Naming Your Workgroup

We will name our workgroup “CHECKERS.” Follow the procedure below to change the workgroup name:

From your computer desktop, click the *Start* button.

On the right side of the Start menu, navigate to and right click on *Computer* (if using a terminal without a mouse, click the  icon on the keyboard to perform a right click). This displays a set of options.

Navigate to and click on the *Properties* option at the bottom of the list. This opens a page that displays basic information about your computer.

Under the Computer Name, Domain, and Workgroup Settings section, click on *Change Settings*. This takes you to the page where you may change your network settings.

If not already selected, click on the *Computer Name* Tab.

Click the *Change* button. This displays the Computer Name/Domain Changes window where you can change the computer name and workgroup name.

Change the workgroup name to “CHECKERS.”

Click the *OK* button. (See Figure 4-1).

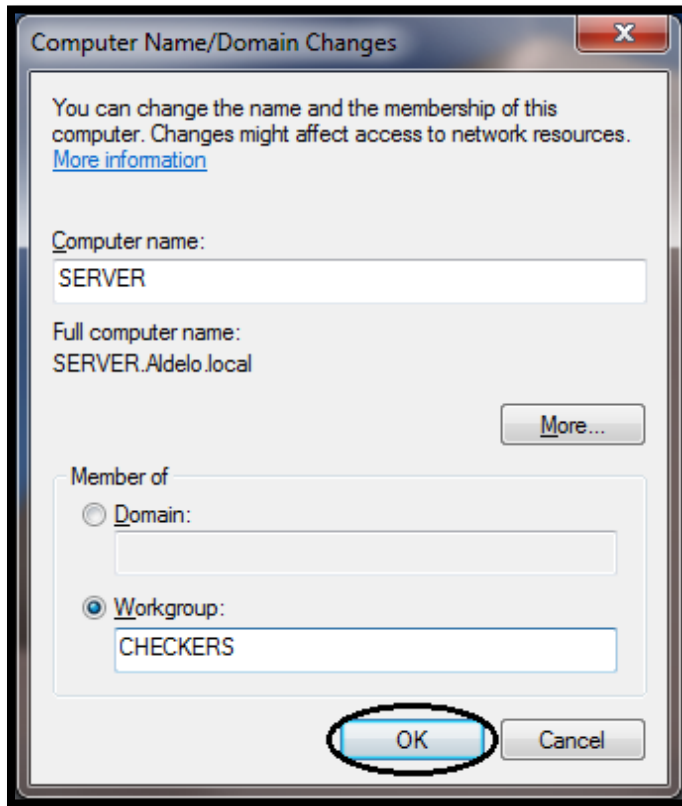


Figure 4-1

If the system prompts you to restart, accept and allow the system to restart.

Naming Your Computers

Follow the same steps listed in the previous section, but change the name of your server computer in step six to “SERVER.” Repeat these steps for each of the terminals on your network, giving each a unique name (See Figure 4-1, above).

Changing the IP Addresses

Click the *Start* button on your computer desktop.

On the right side of the Start menu, navigate to and click on *Control Panel*. This displays the Control Panel where many system settings may be changed.

If your screen displays the Category view, click on the *Network and Internet* option. If your screen displays the Icon view, skip this step and continue with the next step.

On the following screen, click on *Network and Sharing Center*. This opens a page that displays your current basic network information. On the left side of this screen, click on the *Change Adapter Settings* option.

A list of network adapters displays. Select your network adapter from this list. If more than one adapter displays and you are unsure of which one to select, check with your network administrator.

Right-click your adapter to display a list of options. Click the *Properties* option at the bottom of this list.

Highlight the *Internet Protocol Version 4 (TCP/IPv4)* item in the center of the window.

Click the *Properties* button. This displays the Internet Protocol Version 4 (TCP/IPv4) Properties window.

Click the *Use the following IP address:* radio button. This enables the fields below, allowing you to edit them.

In the IP Address field, enter the IP address you wish to use for this system. Our example uses “192.168.0.1.” Check with your network administrator for the value to enter in this field.

Hit the *Tab* key on your keyboard to populate the Subnet Mask field automatically. The value entered in this field by Windows is usually correct.

Click the *OK* button (See Figure 4-2).

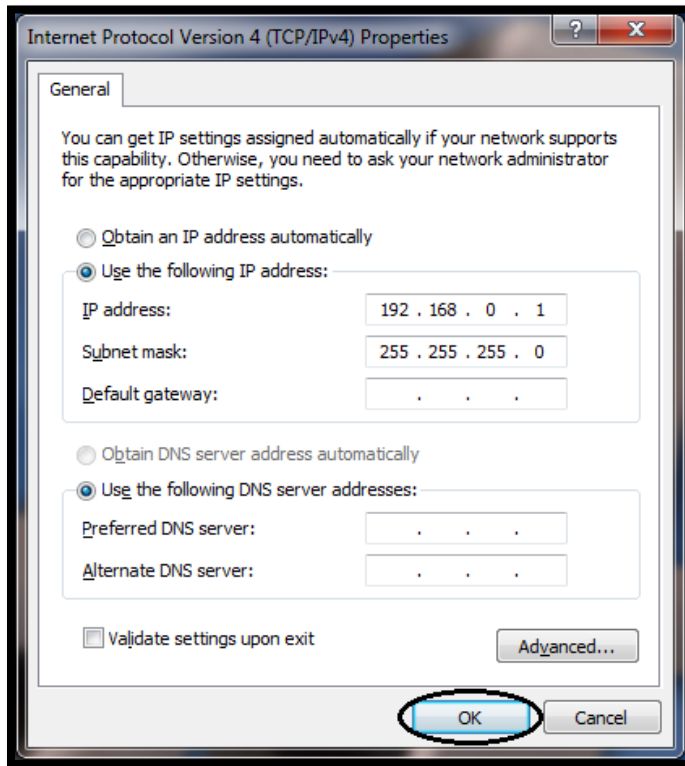


Figure 4-2

Repeat the procedure above for each of the terminals on your network.

The IP address should be incremented by one for each successive terminal. For example, if you used the number above as the IP address for your server computer, use “192.168.0.2” for POS1, “192.168.0.3” for POS2, etc.

Continue in this manner until all of your terminals have an IP address assigned to them. Don’t forget to add the default subnet mask as described above.

Testing Your Network

Now that we have configured the network, we are ready to test to see if the network is operational by performing the PING command in MS-DOS. On your computer desktop, click the *Start* button. In the Search Programs and Files textbox at the bottom of the Start menu, type the word “command” and press the *Enter* key on your keyboard. The Command Prompt screen appears. In the Command Prompt screen, enter “PING w.x.y.z” where “w.x.y.z” is the IP address of another computer that you specified earlier in the setup. For example, to test the

server computer from another POS station, type “PING 192.168.0.1” and press the *Enter* key to issue the command. Check to see if there are any replies. In addition, check the Packet Loss information. This value should be zero to denote that you configured your network successfully. If your PING result indicates failure, check your cabling and settings. If the problem persists, consult with a qualified network technician to determine the cause of the problem.

Although the network setup and configuration procedures are quite simple, an experienced computer technician may be able to help you set up the network faster. Therefore, if you have any doubts as to the installation of the network, then it may be beneficial to have a qualified technician assist you or complete the job for you.

In addition, should you have any questions, the Windows® network installation help information should be referenced during your network configuration. Windows® 7 Professional also has a Network Installation Wizard that might be helpful in assisting with the network configuration portion.

Chapter 5 — POS Software Installation

Getting Started

The following sections provide step-by-step installation guidance for a typical deployment of XERA® POS. This chapter describes how to install the required software onto a computer running Microsoft Windows® 7 Professional.

Installation of XERA® POS

The installation of XERA® POS is very straightforward. This section describes each of the steps involved in performing the software installation.

Download the XERA® POS installation file from the Aldelo website and place it on your computer desktop. Next, double-click the file to begin the installation process.

When the Welcome screen appears, click the *Next* button to continue (See Figure 5-1).

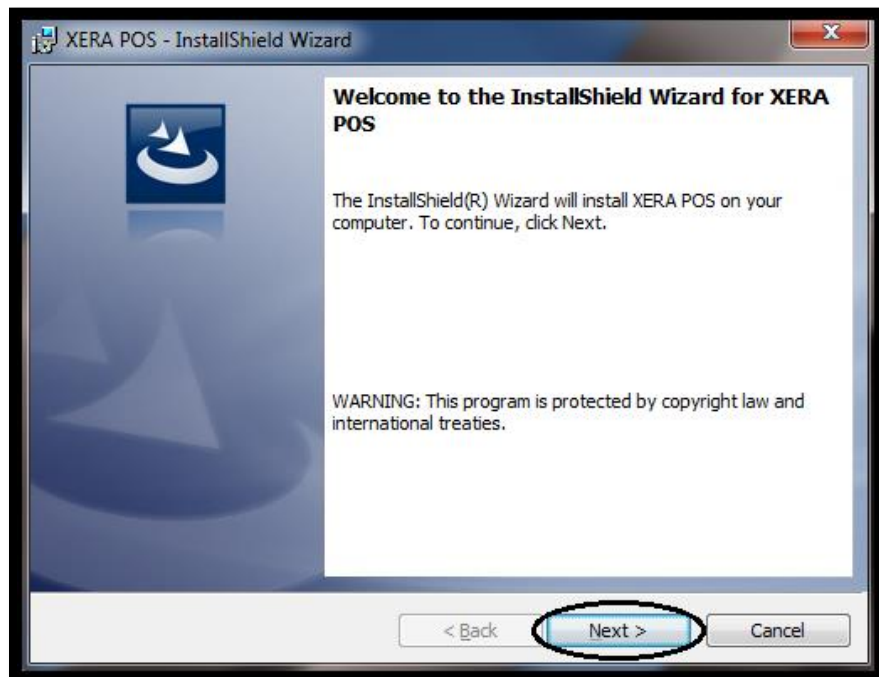


Figure 5-1

Next, the License Agreement screen displays. Read the agreement license carefully. If you wish, you may print a hard copy of it by clicking the *Print* button. By accepting the terms of the License Agreement, you are creating a legal agreement between you and Aldelo, LP.

If you agree with the terms, select the *I accept the terms in the license agreement* radio button and then click the *Next* button to continue (See Figure 5-2).



Figure 5-2

(Please note: If you do not agree with the terms of the License Agreement, you cannot install the software.)

On the Destination Folder screen that follows, accept the default folder for the installation, or if you prefer, click the *Change* button and navigate to your desired installation location. When finished, click the *Next* button to proceed (See Figure 5-3).

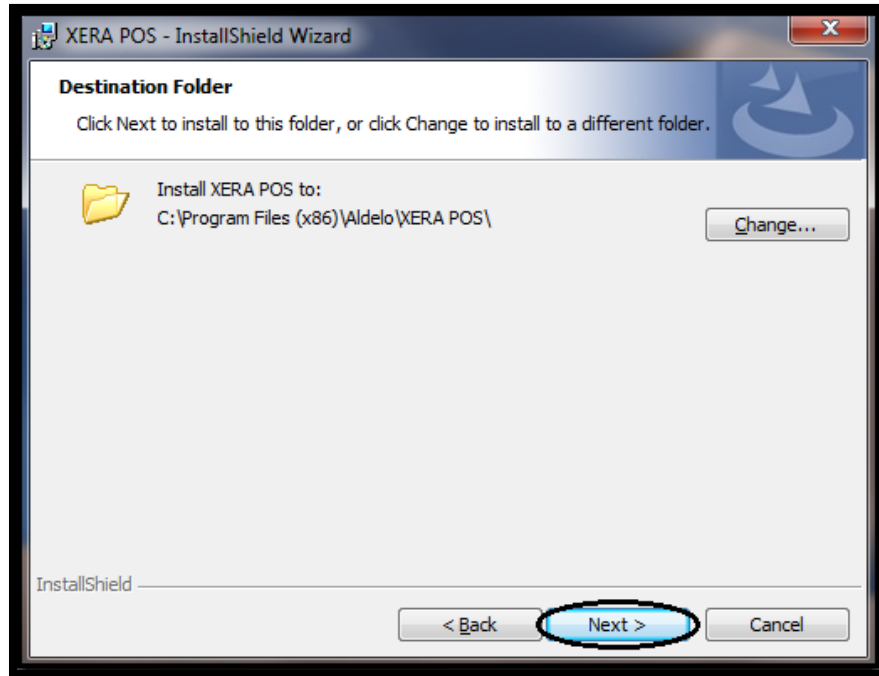


Figure 5-3

On the Setup Type screen, select the type of setup that suits your needs (*Typical* or *Custom*).

The Typical setup type installs the manager application, the POS application, and the device manager on your computer. The Typical setup type is usually used when installing to the same computer that holds the SQL Server database.

The Custom setup type allows you to select any combination of the three features for installation. The Custom setup type is usually used to install only the POS application onto your business's POS terminals.

Once you have selected your setup type, click the *Next* button to continue (See Figure 5-4).

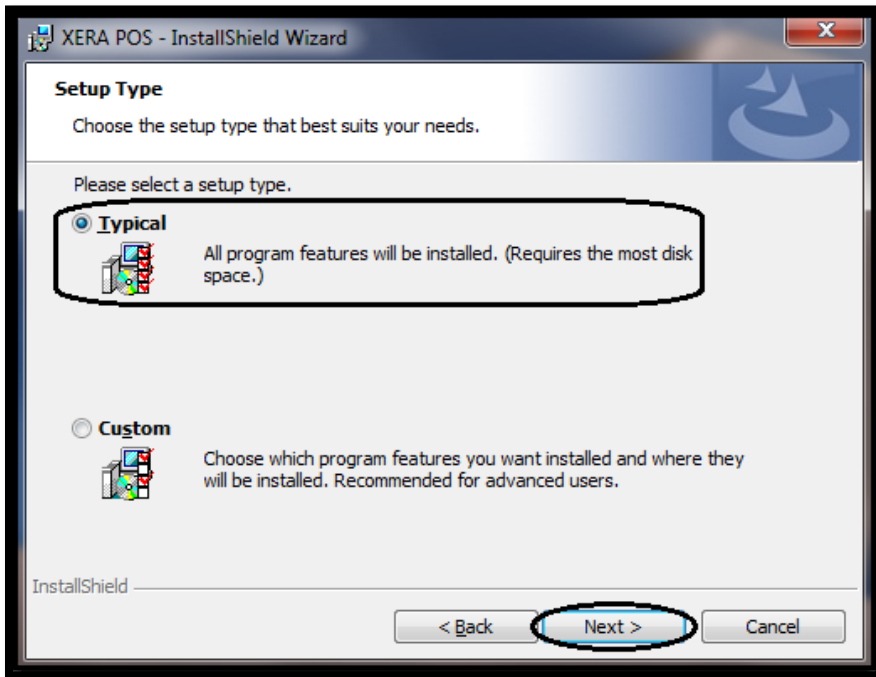


Figure 5-4

TYPICAL SETUP

If you chose the typical setup type, both the manager application and the POS application are installed on the computer. Follow the instructions in this section. If you wish to perform the Custom setup type, skip this section and continue with the following section.

The Ready to Install the Program screen appears next. Verify that the current settings are correct. If they are not, click the *Back* button and make any necessary changes.

When ready to proceed, click the *Install* button (See Figure 5-5).

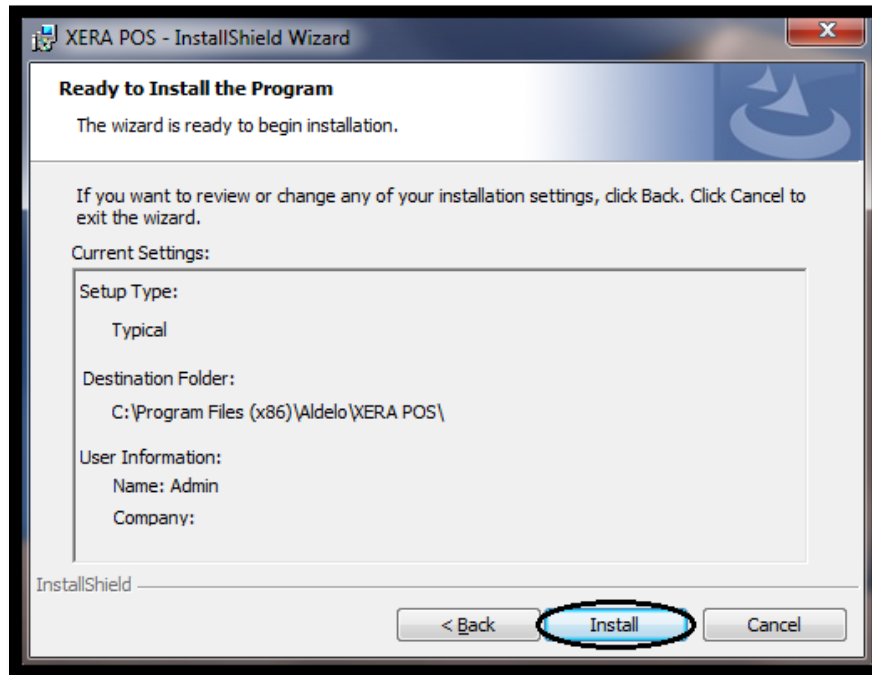


Figure 5-5

During the installation process, the following screen displays (See Figure 5-6).

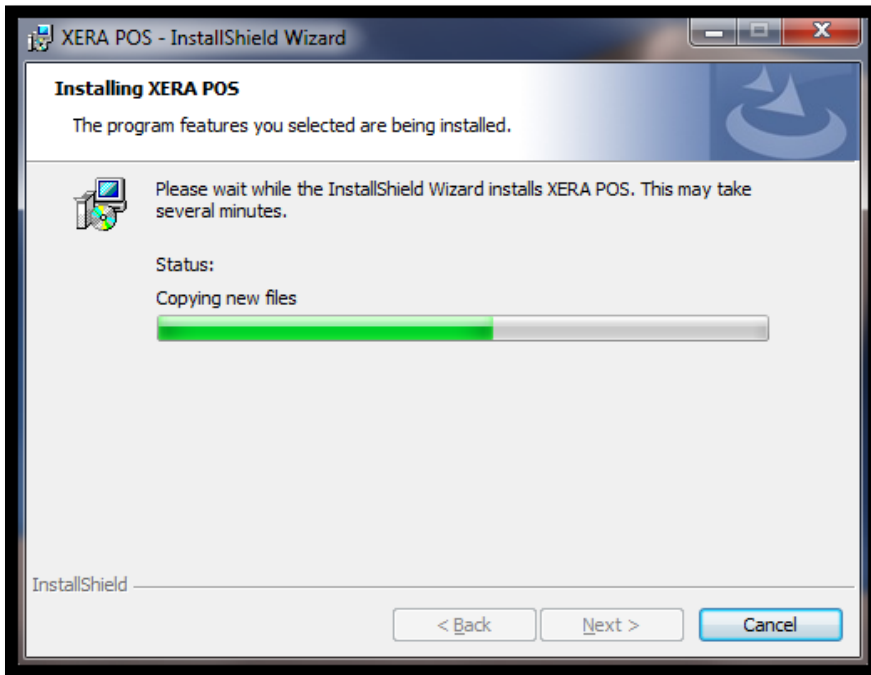


Figure 5-6

Click the *Finish* button on the InstallShield Wizard Completed screen to exit the wizard (See Figure 5-7).

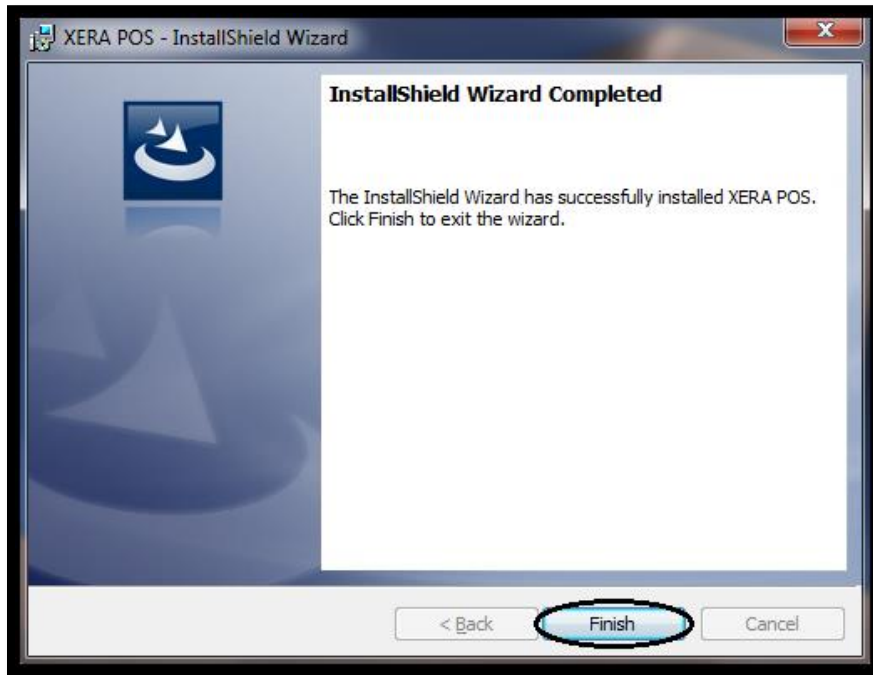


Figure 5-7

When finished, restart your computer, whether or not you are prompted to do so. If you performed the *Typical Setup*, your installation is now complete. Skip the following *Custom Setup* section.

CUSTOM SETUP

If you chose *Custom* on the Setup Type screen (See Figure 5-4, above), the Custom Setup screen follows. Here you may install any combination of the three features listed.

To install only the POS software, click on the icon labeled *Manager Application* and then select the *This feature will not be available* option. Next, click on the icon labeled *Device Manager* and do the same. If necessary, also click on the icon labeled *POS Application* and then select the *This feature will be installed on local hard drive* option.

When finished, click the *Next* button to continue (See Figure 5-8).

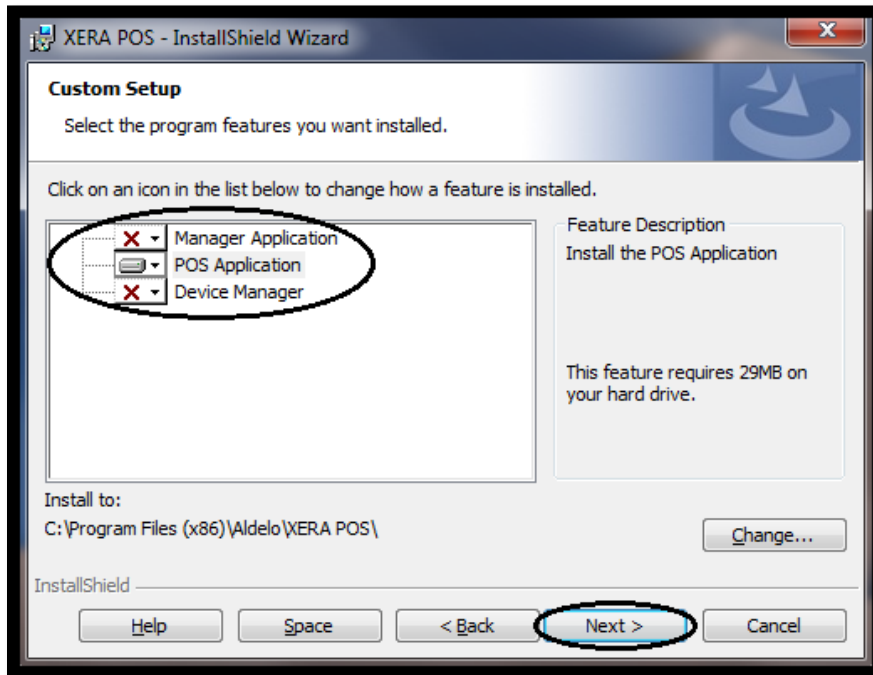


Figure 5-8

The Ready to Install the Program screen appears. Click the *Install* button (See Figure 5-9).

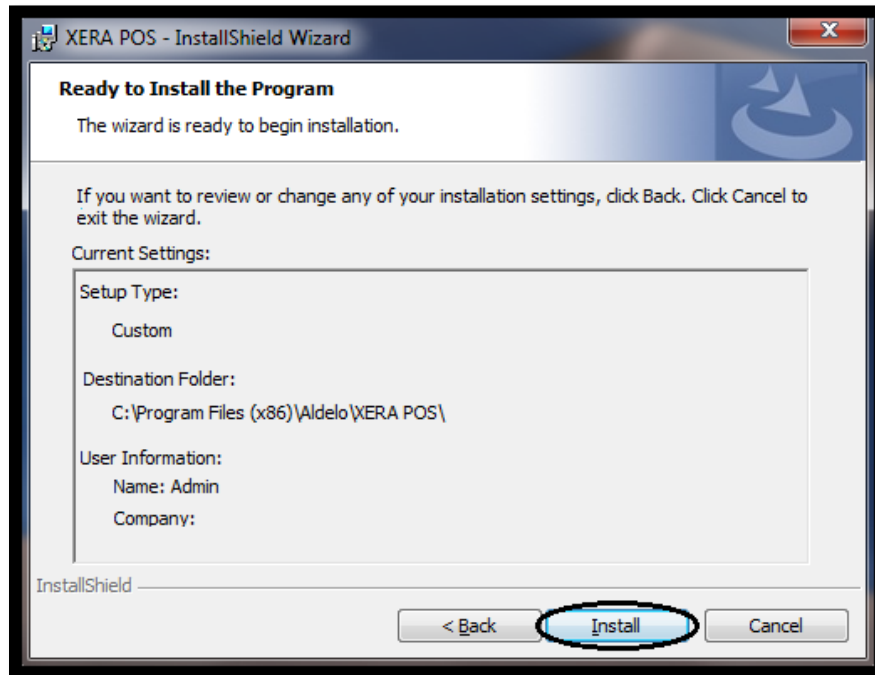


Figure 5-9

During the installation process, the following screen displays (See Figure 5-10).

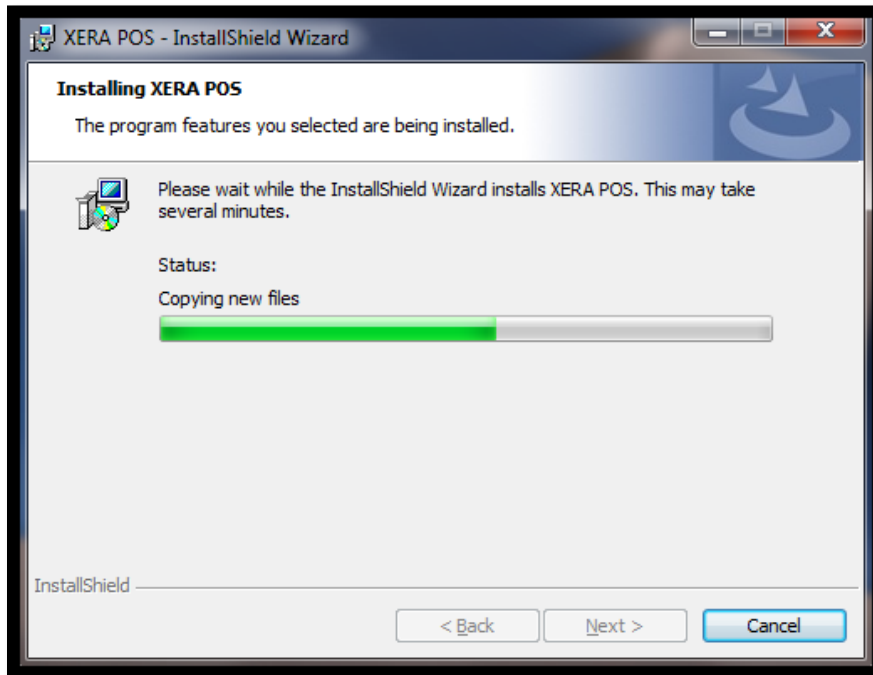


Figure 5-10

Click the *Finish* button on the InstallShield Wizard Completed screen to exit the wizard (See Figure 5-11).

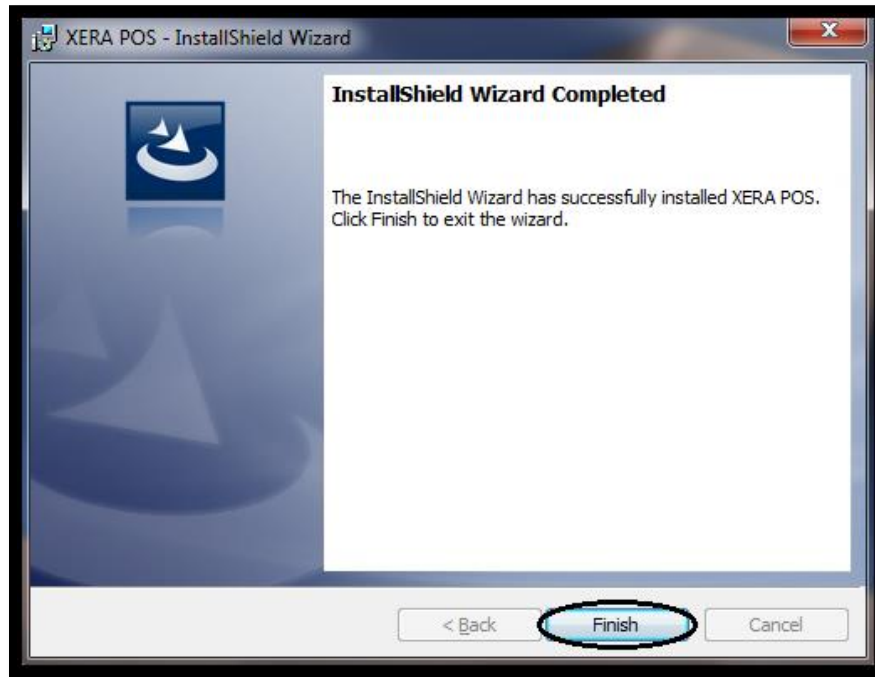


Figure 5-11

When finished, restart your computer, whether or not you are prompted to do so.

INSTALLING THE REQUIRED SOFTWARE USING THE XERA® POS INSTALLER

After you have successfully installed the XERA® POS software, you must then install the software components that are required to run XERA® POS.

From your computer desktop, navigate to **Start Button > All Programs > XERA POS > Installers** (See Figure 5-12).

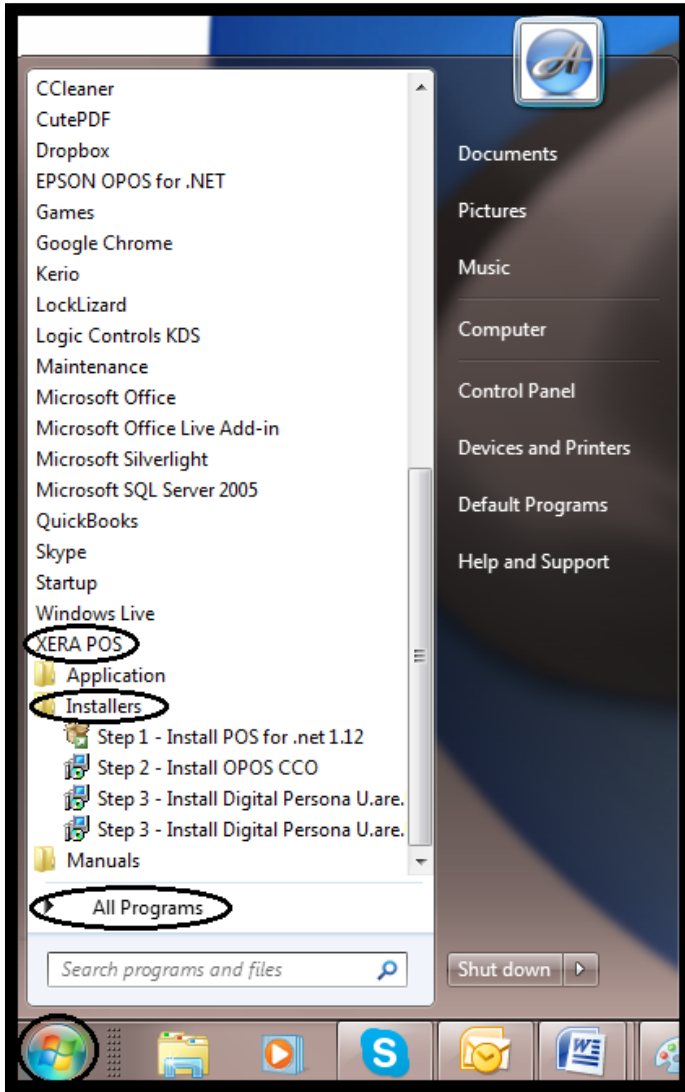


Figure 5-12

The sections below provide step-by-step instructions on how to install each component.

Step 1 - Installing Microsoft Point of Service for .NET 1.12

Microsoft Point of Service for .NET 1.12 is a .NET Framework enabled version of OPOS (OLE for Point-of-Sale). In essence, POS for .NET 1.12 is a .NET wrapper that enables

receipt printing with OPOS enabled printer devices. POS for .NET is required for XERA® POS.

To install the service, from your computer desktop, navigate to **Start > All Programs > XERA POS > Installers**. Next, right-click the *Step 1 – Install POS for .net 1.12* menu item and select *Run as Administrator* from the displayed list.

The InstallShield Wizard screen opens. If desired, read the release notes by clicking the *Documentation* button. Next, click the *Install* button directly below it to begin the installation process (See Figure 5-13).

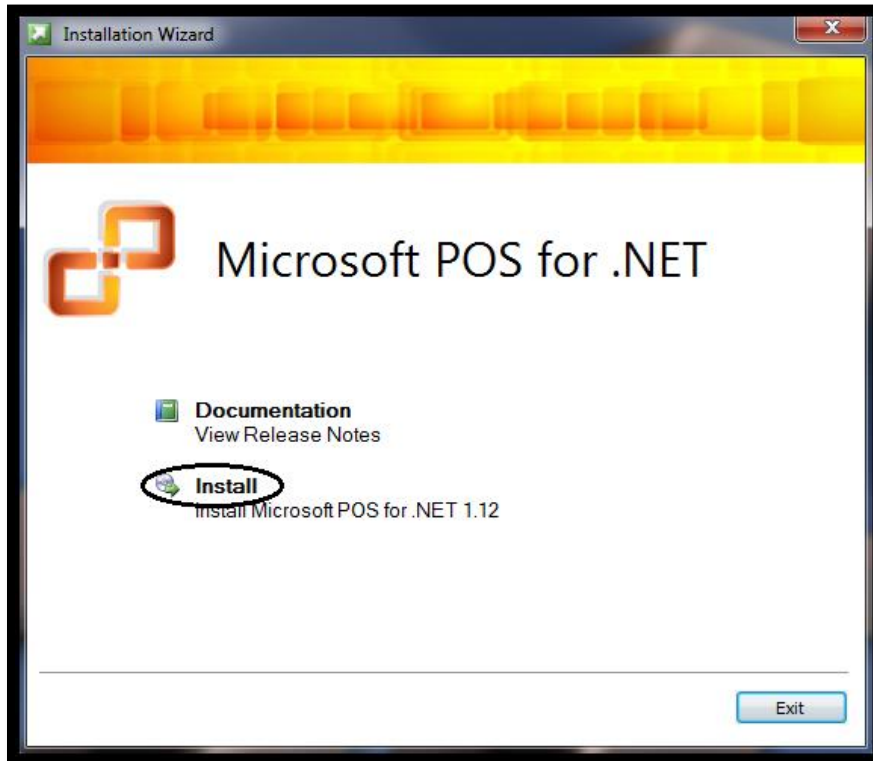


Figure 5-13

The Customer Information screen displays next. Enter your User Name and Organization Name (Company Name) in the appropriate fields.

Accept the default value for the Product Key and click the *Next* button. (See Figure 5-14).

Microsoft POS for .NET 1.12 Installation Wizard

Customer Information
Type your information.

Enter your name and the name of your organization.

User Name: Dave Ventura
Organization: Aldelo, LP

Provide the product key for this product in the boxes below.

Product Key: BRRR3 - 4TPF9 - KVT2D - 688J4 - F33KH

The 25-character product key appears on the lower section of your certificate of authenticity.

< Back Next > Cancel

Figure 5-14

(Please note: The Product Key field boxes are disabled and cannot be edited. It is OK to use this default Product Key when installing POS for .NET 1.12.)

On the License Agreement screen that follows, read the license agreement carefully and in its entirety. Acceptance of the license agreement creates a legal agreement between you and Microsoft Corporation.

If you accept the terms of the license agreement, click the *Accept* button to continue (See Figure 5-15).

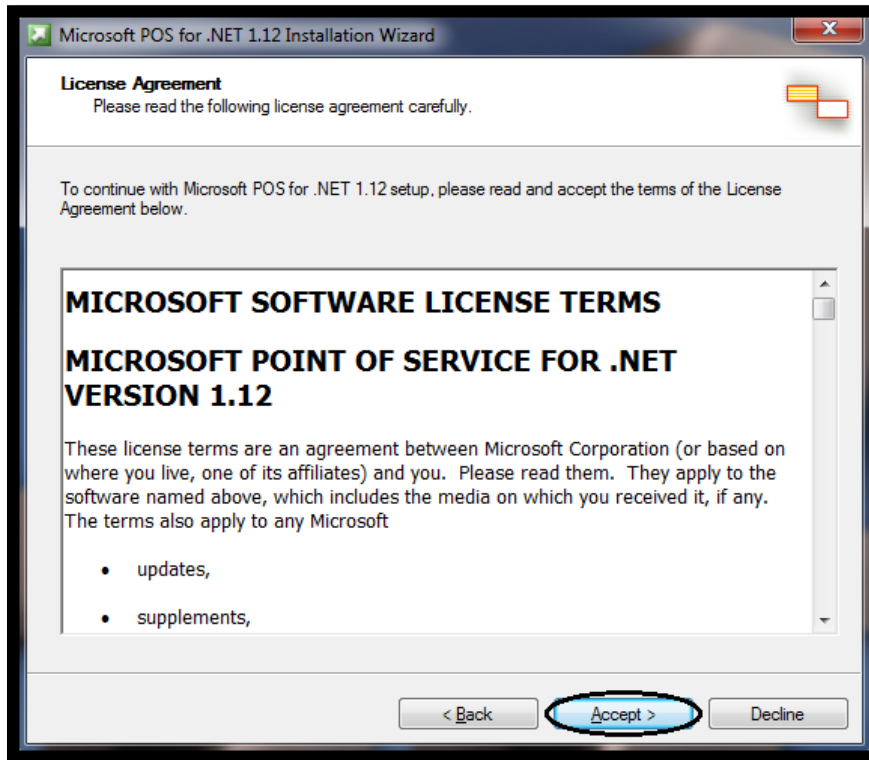


Figure 5-15

(Please note: If you do not accept the terms of the license agreement, you cannot install the software.)

Next, the Installation Options screen appears. The default installation folder is listed in the Install To field. If you wish to install to a different folder, click the *Browse* button and navigate to your desired folder. You may also create a new folder from this window.

Choose the *Typical* installation type radio button and then click the *Next* button to continue (See Figure 5-16).

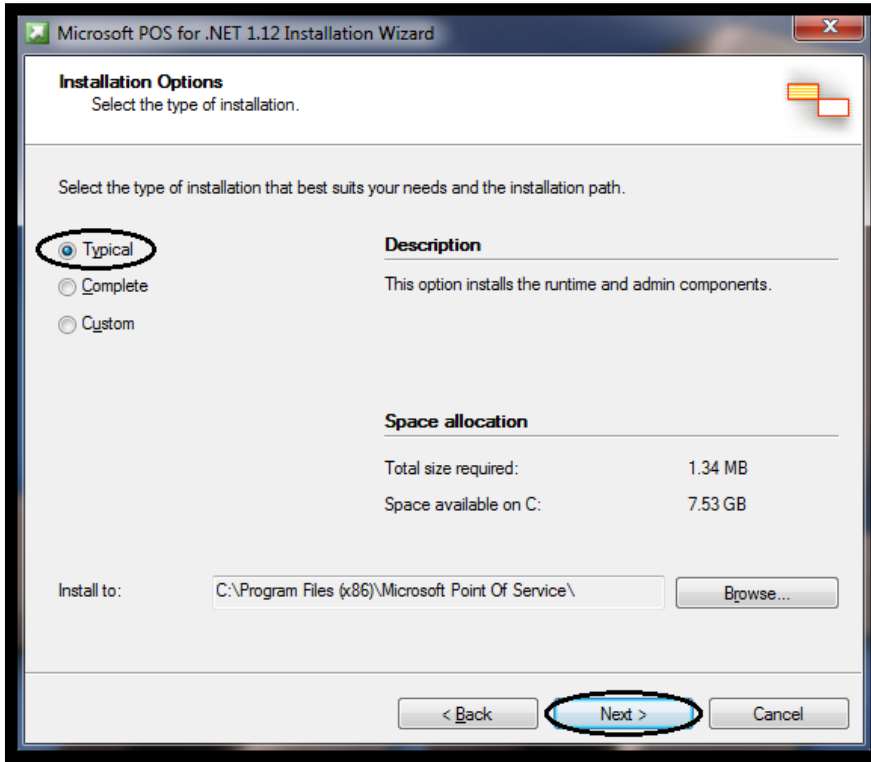


Figure 5-16

(Please note: For the purposes of XERA® POS, it is not necessary to select either the *Complete* installation option or the *Custom* installation option. The *Typical* installation option includes everything needed.)

On the Summary screen, review your installation components. When you are satisfied that they are correct, click the *Install* button (See Figure 5-17).

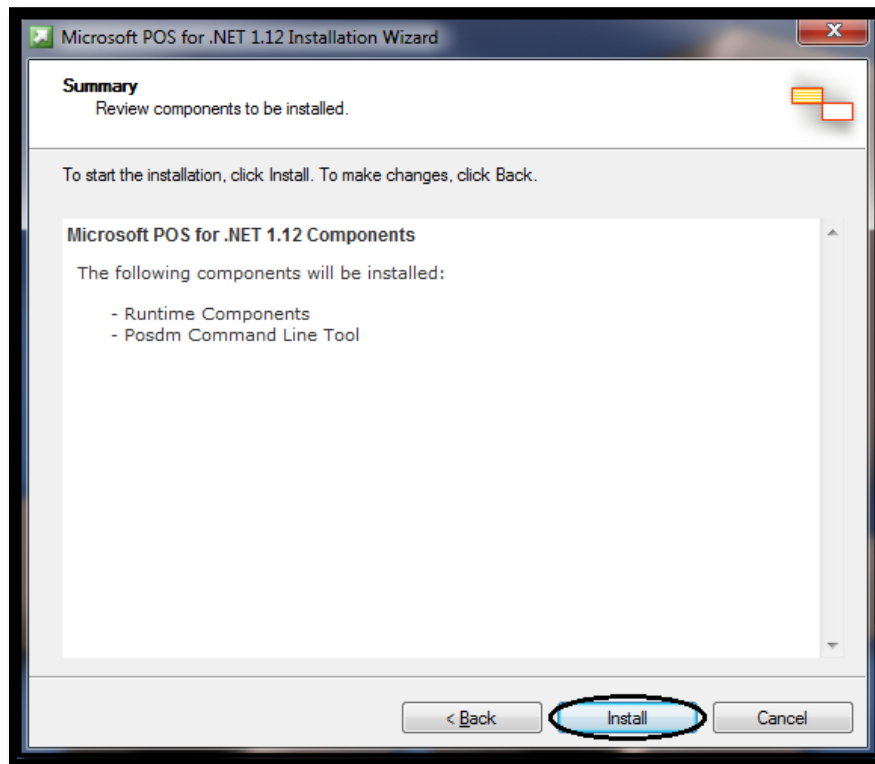


Figure 5-17

The Installation Progress screen displays a series of progress bars while the software is being installed (See Figure 5-18).

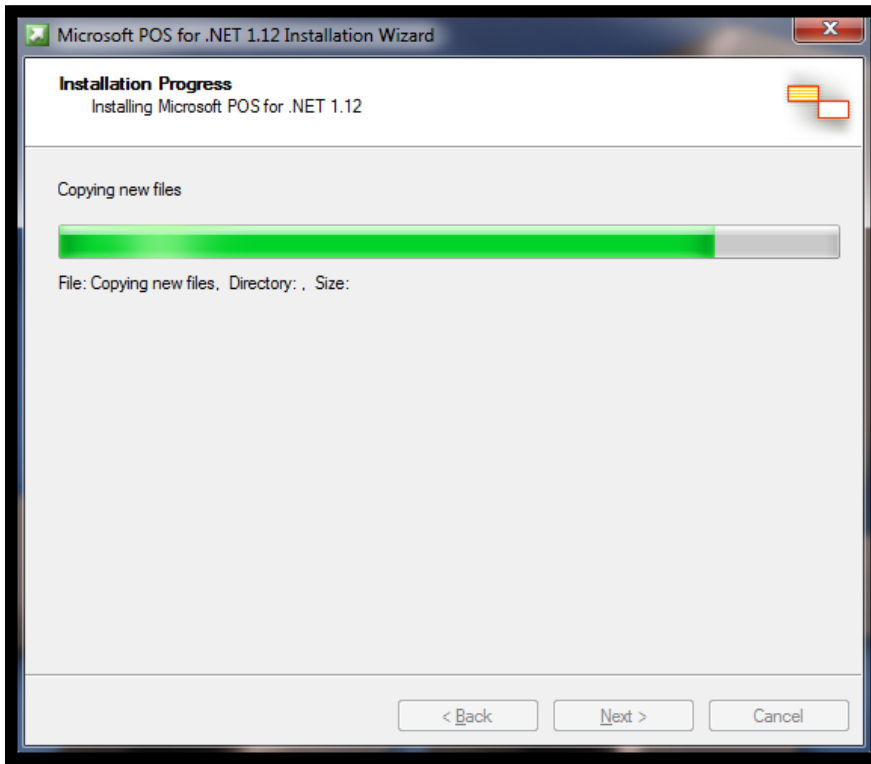


Figure 5-18

When the installation is complete, the system automatically continues to the next screen.

Finally, the Installation Completed screen indicates that you have successfully installed Microsoft POS for .NET 1.12. Click the *Finish* button to close the wizard (See Figure 5-19).

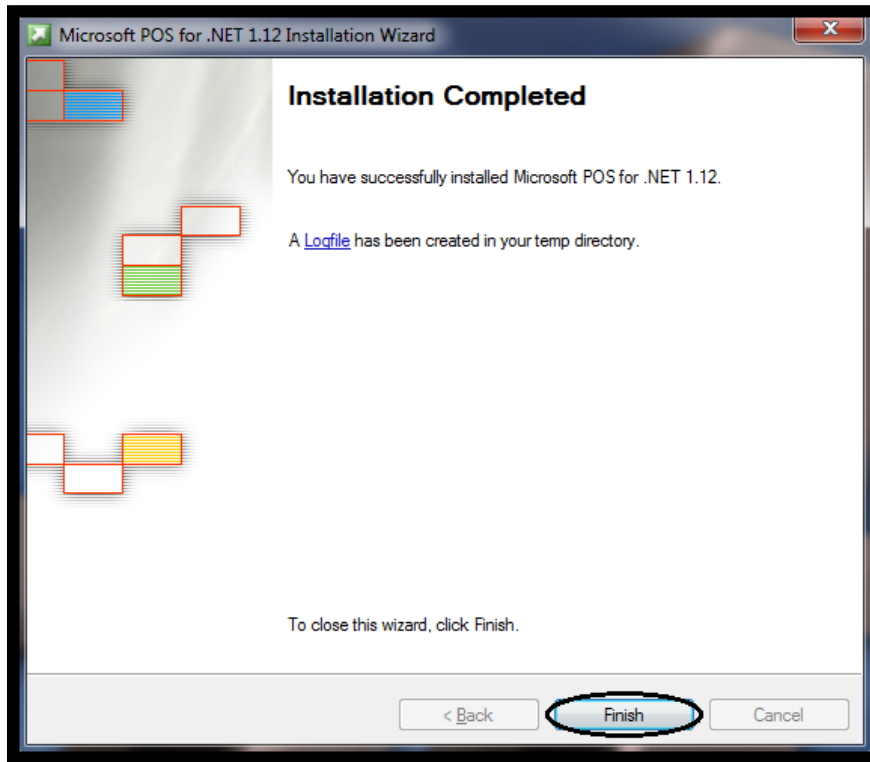


Figure 5-19

Step 2 – Install OPOS CCO

OPOS (OLE for Point-of-Sale) is a widely adopted point-of-sale device standard that allows point-of-sale hardware to be easily integrated with Microsoft Windows based point-of-sale software systems such as XERA® POS. OPOS controls handle communication between compatible hardware devices and the point-of-sale software.

The control object for a device class provides the interface for the software program. A standardized set of OPOS control objects known as the Common Control Objects (CCO) may be used with most devices.

To install OPOS Common Control Objects, from your computer desktop, navigate to **Start Button > All Programs > XERA POS > Installers**.

Next, click on the *Step 2 – Install OPOS CCO* menu item. The InstallShield Wizard screen opens. Click the *Next* button to continue (See Figure 5-20).

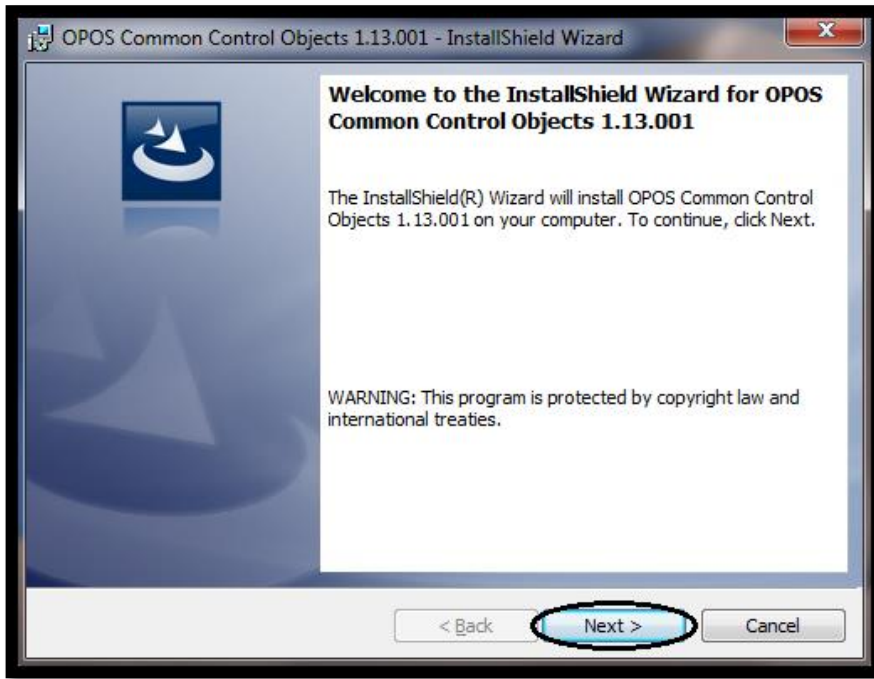


Figure 5-20

The next screen is the Destination Folder screen. The default destination folder is displayed. If you wish to install to a different folder, click the *Change...* button and navigate to your desired folder. You may also create a new folder from this window.

When finished, click the *Next* button to continue (See Figure 5-21).

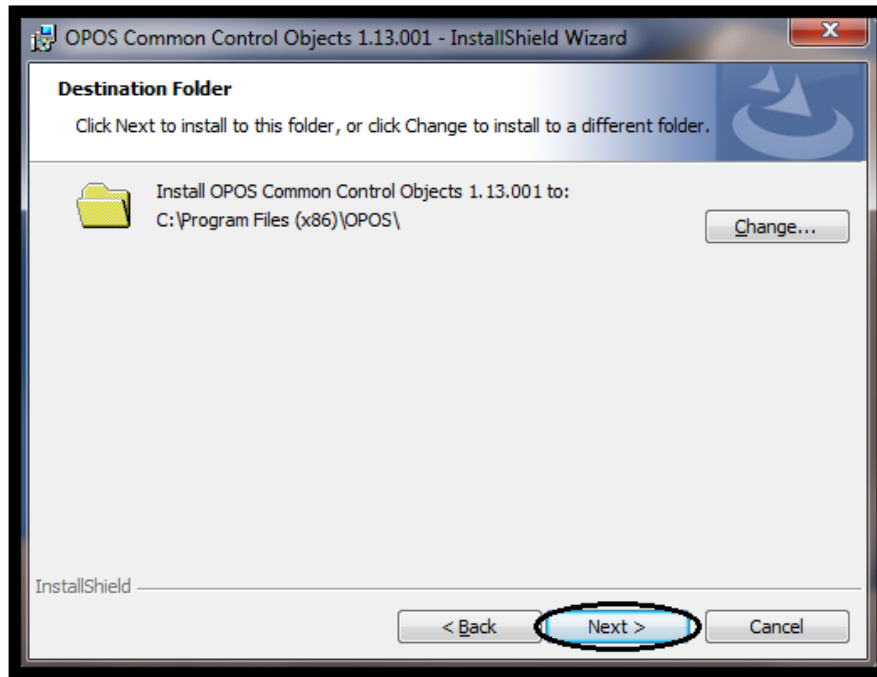


Figure 5-21

On the Setup Type screen, choose the *Complete* setup type, and then click the *Next* button to continue (See Figure 5-22).

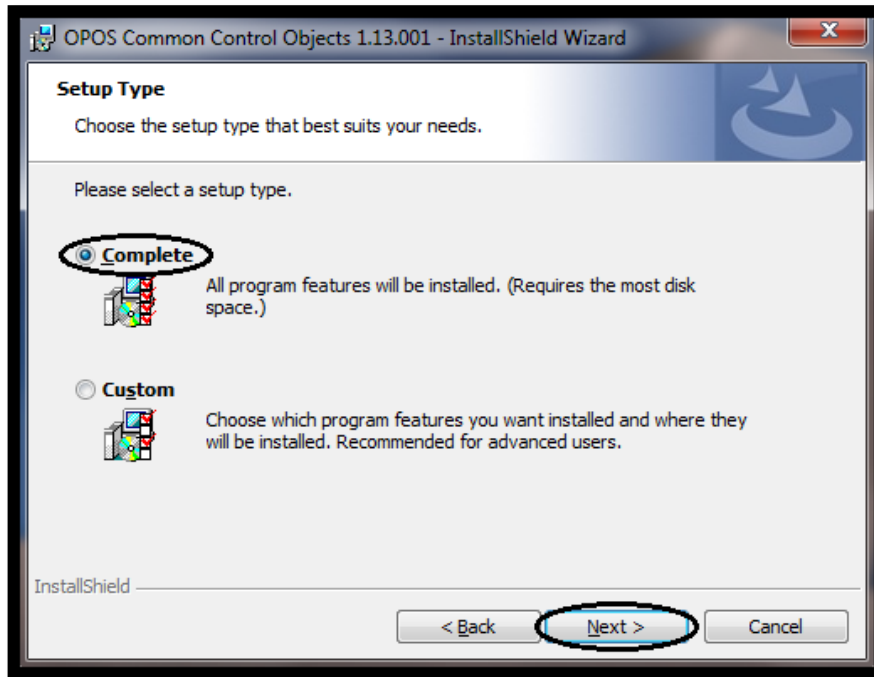


Figure 5-22

(Please note: For the purposes of XERA® POS, it is not necessary to select the *Custom* setup type option. The *Complete* setup type option installs everything needed.)

The Ready to Install the Program screen lets you know that the installation is ready to proceed. If you wish to review or change any of your installation settings, click the *Back* button and make your desired changes.

When you are satisfied that your installation settings are correct, click the *Install* button (See Figure 5-23).

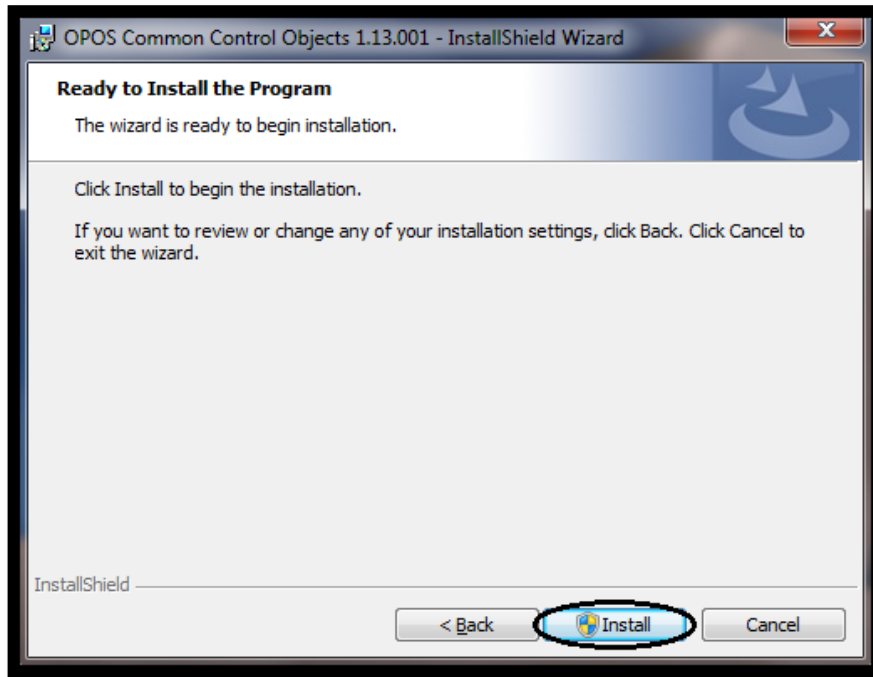


Figure 5-23

The Installing OPOS Common Control Objects screen displays a series of progress bars while the software is being installed (See Figure 5-24).

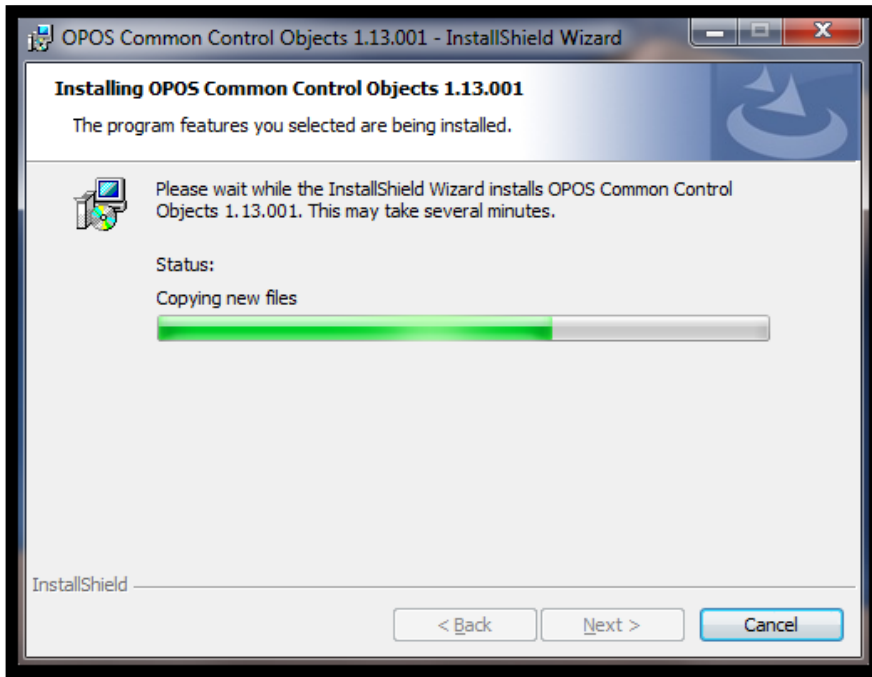


Figure 5-24

When the installation is complete, the system automatically continues to the next screen.

Finally, the InstallShield Wizard Completed screen indicates that you have successfully installed the OPOS Common Control Objects software. Click the *Finish* button to close the wizard (See Figure 5-25).

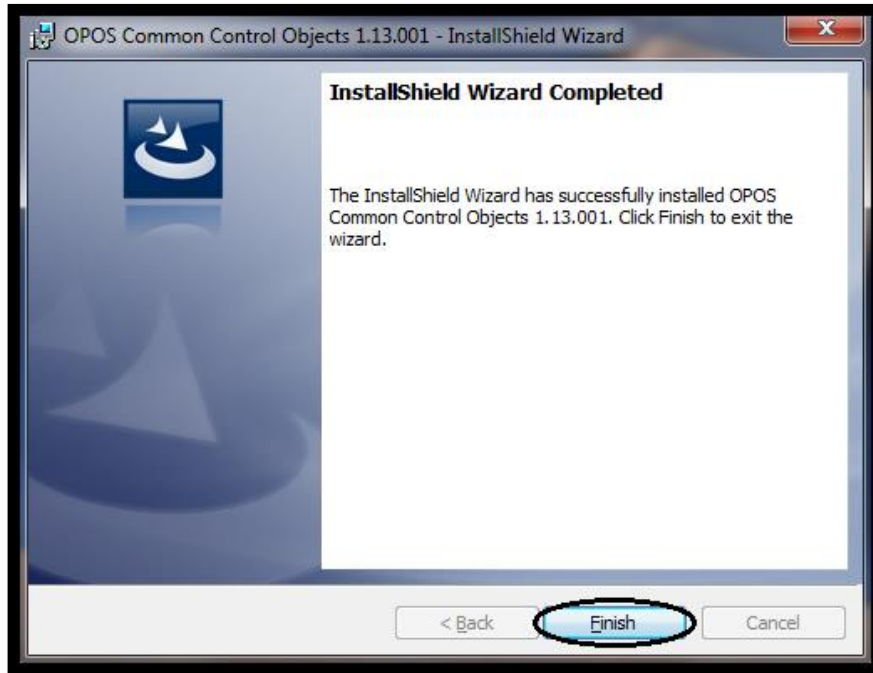


Figure 5-25

Step 3 – Install DigitalPersona U. are U.

Please note that Step 3 of the software installation procedure is required only if you intend to use fingerprint readers with XERA® POS as a means of identifying the users of your system. If you do not intend to do so, skip this step and proceed to the next section.

Fingerprint identification prevents your employees from logging into the system as someone else by entering another employee's password. It also eliminates the problem of your employees forgetting their passwords or leaving their access cards at home. The DigitalPersona U. are U. RTE software is designed for use with the DigitalPersona 4500 USB fingerprint reader device.

To install the DigitalPersona U. are U. RTE software, you must first determine if your computer is running a 32-bit or 64-bit version of the Windows operating system. To do so, from your computer desktop, click the *Start* button. On the right side of the Start menu, navigate to and click on *Control Panel*. This displays the Control Panel where many system settings may be changed.

If your screen displays the Category view, click on the *System and Security* option. If your screen displays the Icon view, skip this step and continue with the next step.

On the following screen, click on the *System* option. This opens a page that displays the current basic information about your computer. Under the System section, check the information listed under System Type. The type of your operating system (32-bit or 64-bit) displays here.

From your computer desktop, navigate to **Start Button > All Programs > XERA POS > Installers.**

Next, click on the *Step 3 – Install DigitalPersona U.are.U.- for 'XX' Bit OS* menu item, where 'XX' is the either '32' or '64' as determined above. The InstallShield Wizard screen opens.

Click the *Next* button to continue (See Figure 5-26).

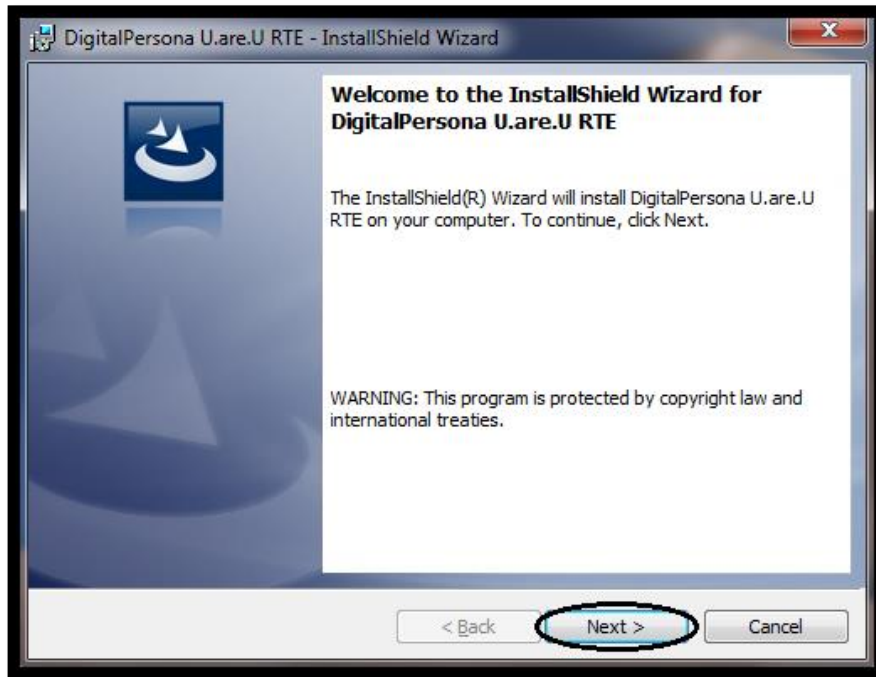


Figure 5-26

On the License Agreement screen that follows, read the license agreement carefully and in its entirety. If desired, you may print a hard copy of the agreement by clicking the *Print* button.

Acceptance of the license agreement creates a legal agreement between you and DigitalPersona. If you accept the terms of the license agreement, click the *I Accept the terms of the license agreement* radio button and then click the *Next* button to continue (See Figure 5-27).

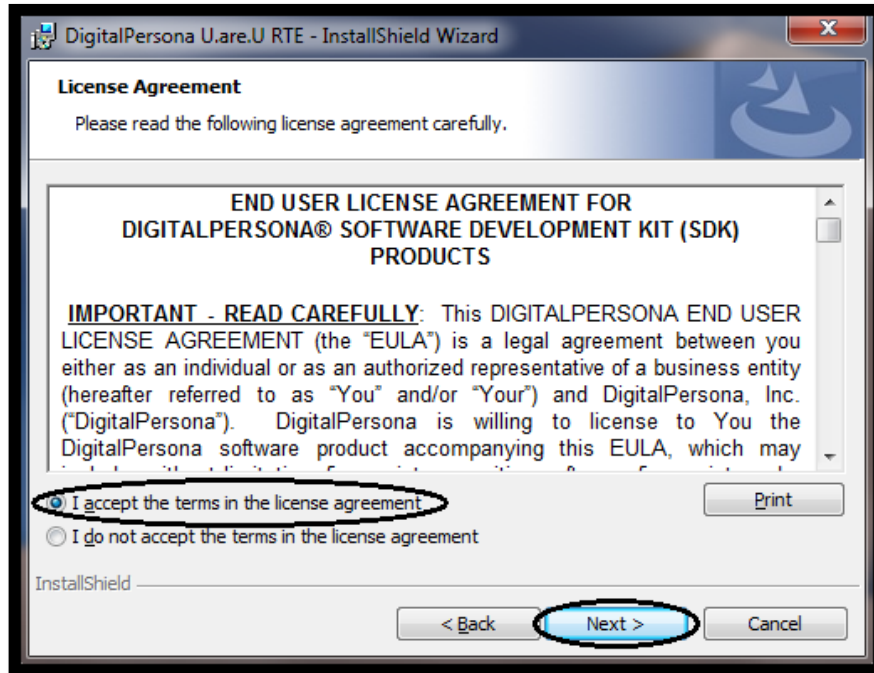


Figure 5-27

(Please note: If you do not accept the terms of the license agreement, you cannot install the software.)

The next screen is the Destination Folder screen. The default destination folder is displayed. If you wish to install to a different folder, click the *Change...* button and navigate to your desired folder. You may also create a new folder from this window.

When finished, click the *Next* button to continue (See Figure 5-28).

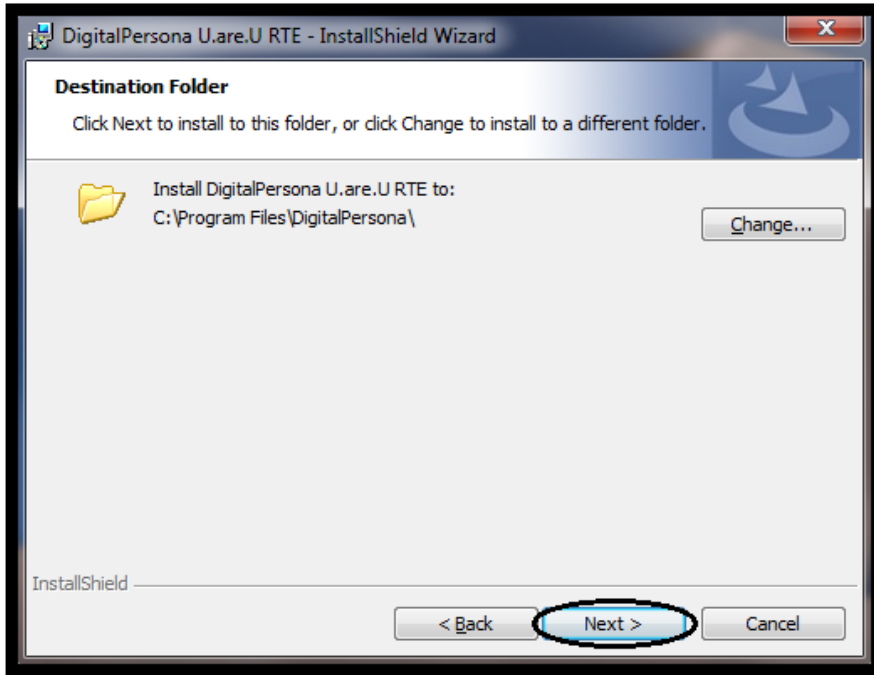


Figure 5-28

On the Custom Setup screen, accept the default installation features. If you wish to check the available disk space on your various drives, click the *Space* button. A highlighted volume indicates that the disk space on that volume is insufficient to allow the installation of the software. If this is the case, click the *OK* button to return to the Custom Setup screen, click the *Change...* button, and then select a different drive that has sufficient disk space.

When finished, click the Next button to continue (See Figure 5-29).

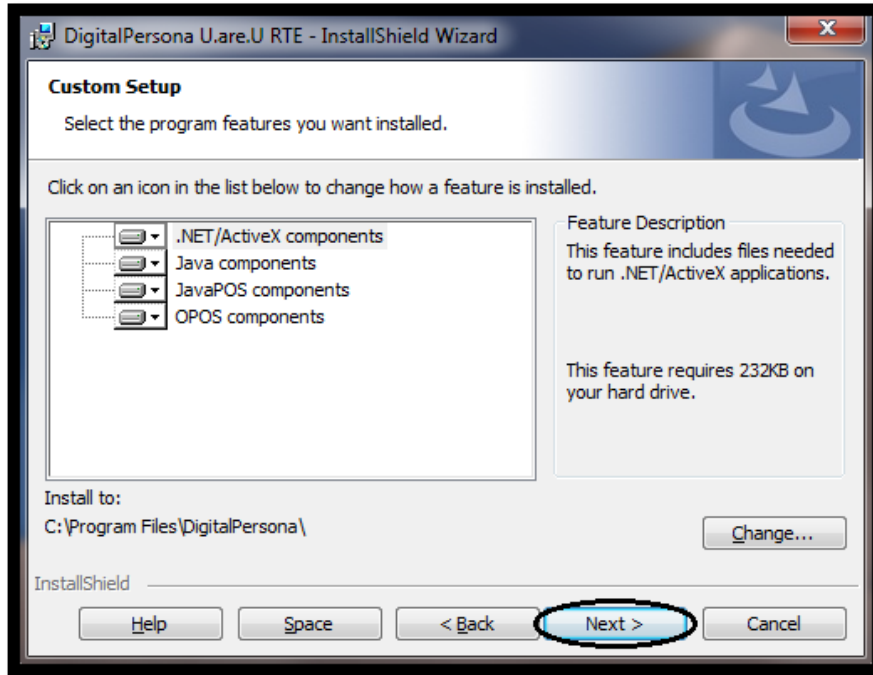


Figure 5-29

The Ready to Install the Program screen lets you know that the installation is ready to proceed. If you wish to review or change any of your installation settings, click the *Back* button and make your desired changes.

When you are satisfied that your installation settings are correct, click the *Install* button (See Figure 5-30).

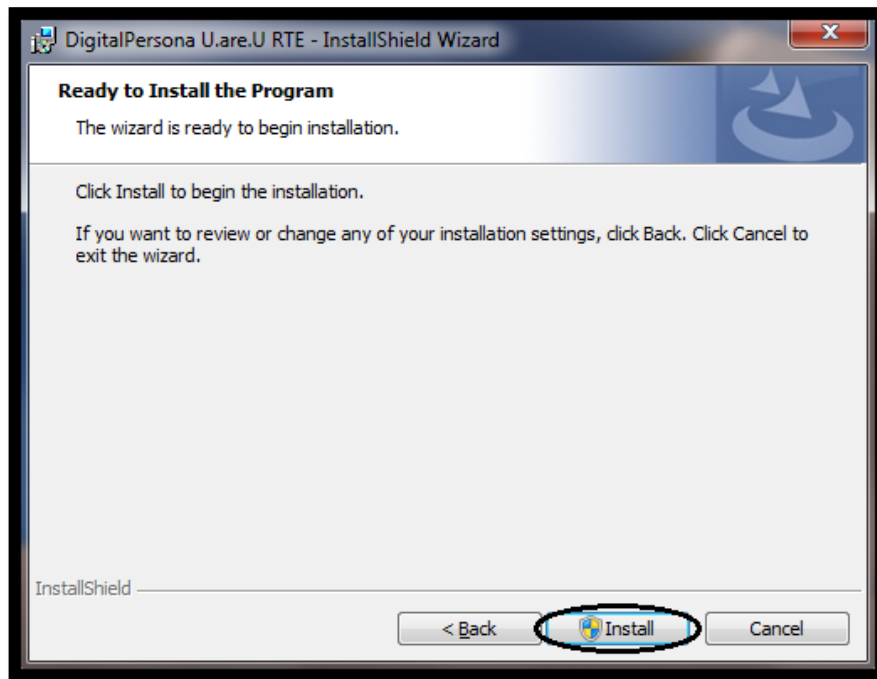


Figure 5-30

The Installing DigitalPersona U. are U. RTE screen displays a series of progress bars while the software is being installed (See Figure 5-31).

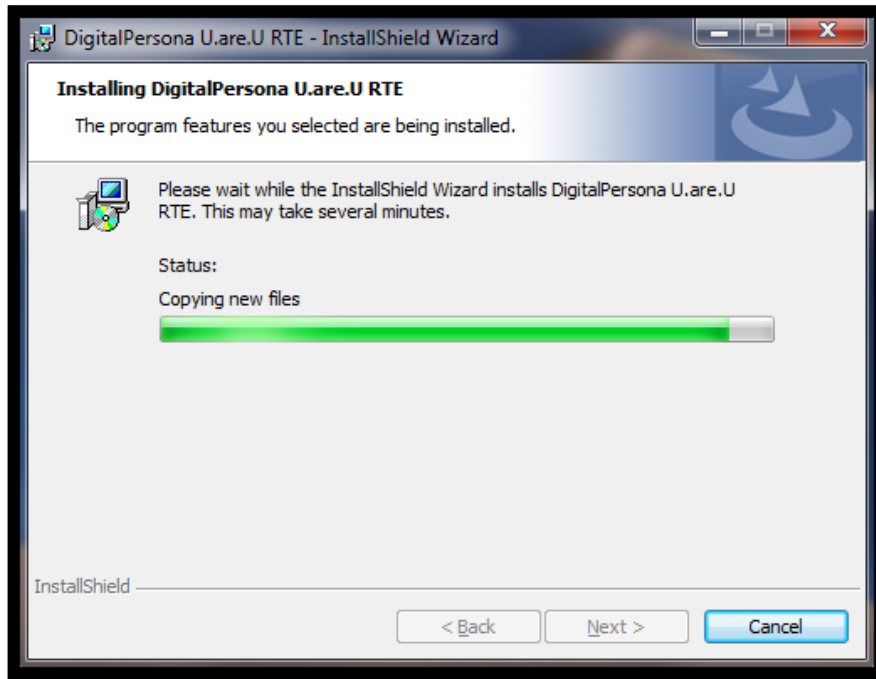


Figure 5-31

When the installation is complete, the system automatically continues to the next screen.

Finally, the InstallShield Wizard Completed screen indicates that you have successfully installed the DigitalPersona U.are.U. RTE software. Click the *Finish* button to close the wizard (See Figure 5-32).

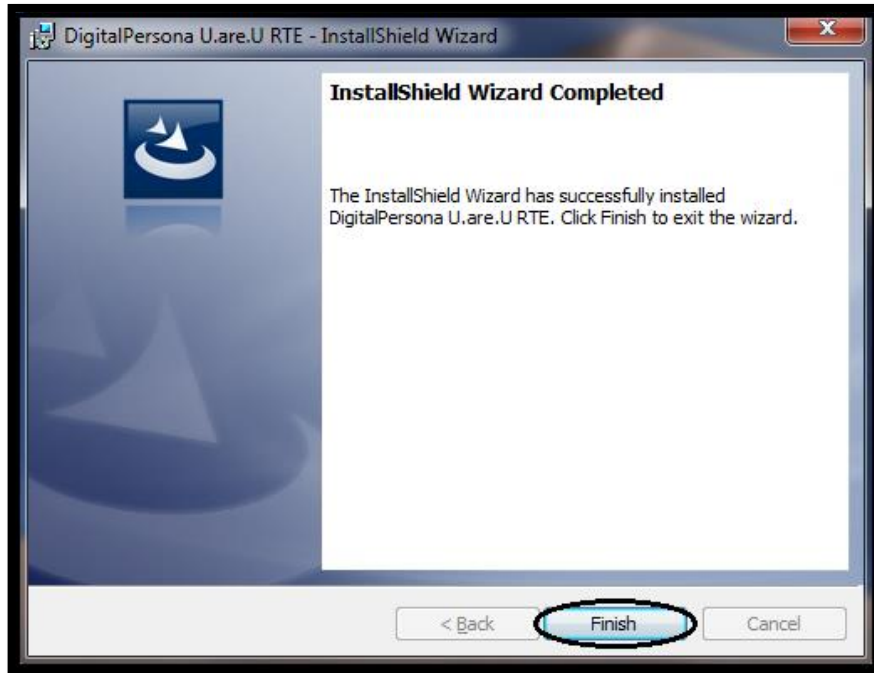


Figure 5-32

Installing Microsoft SQL Server Express

Microsoft SQL Server is an enterprise level database management system that delivers maximum data consistency, security, performance, and reliability. The SQL Server Express edition is a streamlined and free distribution version of SQL Server, targeting small groups of users. XERA® POS uses SQL Server Express. It may be downloaded for free from the Microsoft Download Center website.

SQL Server Express should be sufficient for most merchants' needs; however, if you are a merchant who already has SQL Server, you may use your existing instance. XERA® POS is compatible with SQL Server versions 2005, 2008, and 2012. You may install any of these versions. Please note that the SQL Server Express software is only installed on the computer that acts as the database host. Do not install it on any other stations.

Download your desired version of SQL Server Express from the Microsoft Download Center website and install it on the computer you wish to use as your database host.

Chapter 6 — POS Hardware Setup

Installing the Terminal

If you use all-in-one type terminals, setup is usually very easy (just connect the terminal and go), as most manufacturers install everything prior to shipping their product to the customer. This includes the touch screen drivers, MSR drivers, customer display drivers, etc. If you need assistance with installing drivers for your all-in-one terminal, the manufacturer should be able to assist you.

However, if you use a freestanding touch screen, you must install the drivers for it before it will work. For information about obtaining and installing drivers, contact the manufacturer of the device.

The XERA® Device Manager Application

The XERA® Device Manager application is installed automatically when you install the XERA® POS software. It allows the user to install peripheral devices to the system quickly and easily. It may be used to install printers, cash drawers, MSR (Magnetic Stripe Reader) devices, barcode scanners, and line displays (also known as pole displays). The XERA® Device Manager application is a separate module of XERA® POS.

INSTALLING PERIPHERAL DEVICES USING THE XERA® DEVICE MANAGER APPLICATION

Follow the steps below to install your peripheral devices in XERA® POS by using the XERA® Device Manager application.

Installing the Device Drivers

The first thing you must do when installing peripheral devices is to install the OPOS drivers for the devices.

Install the OPOS drivers on your computer by following the device manufacturers' suggested driver installation procedures. If you have any difficulties installing the drivers, please contact your device manufacturers for assistance.

Opening the XERA® Device Manager Application

After you have successfully installed the drivers for all of the peripheral devices you wish to install with your system, open the XERA® Device Manager application from your computer desktop by navigating to **Start Button > All Programs > XERA POS > Application** and then clicking the *XERA Device Manager* menu item (See Figure 6-1).

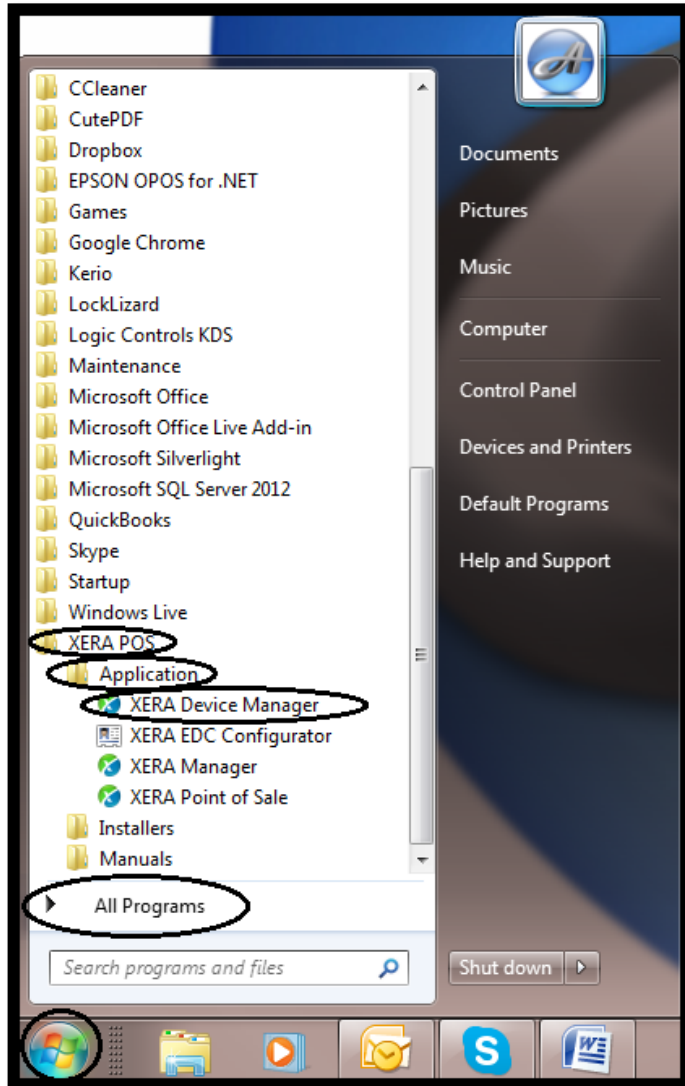


Figure 6-1

The XERA Devices main screen displays (See Figure 6-2).

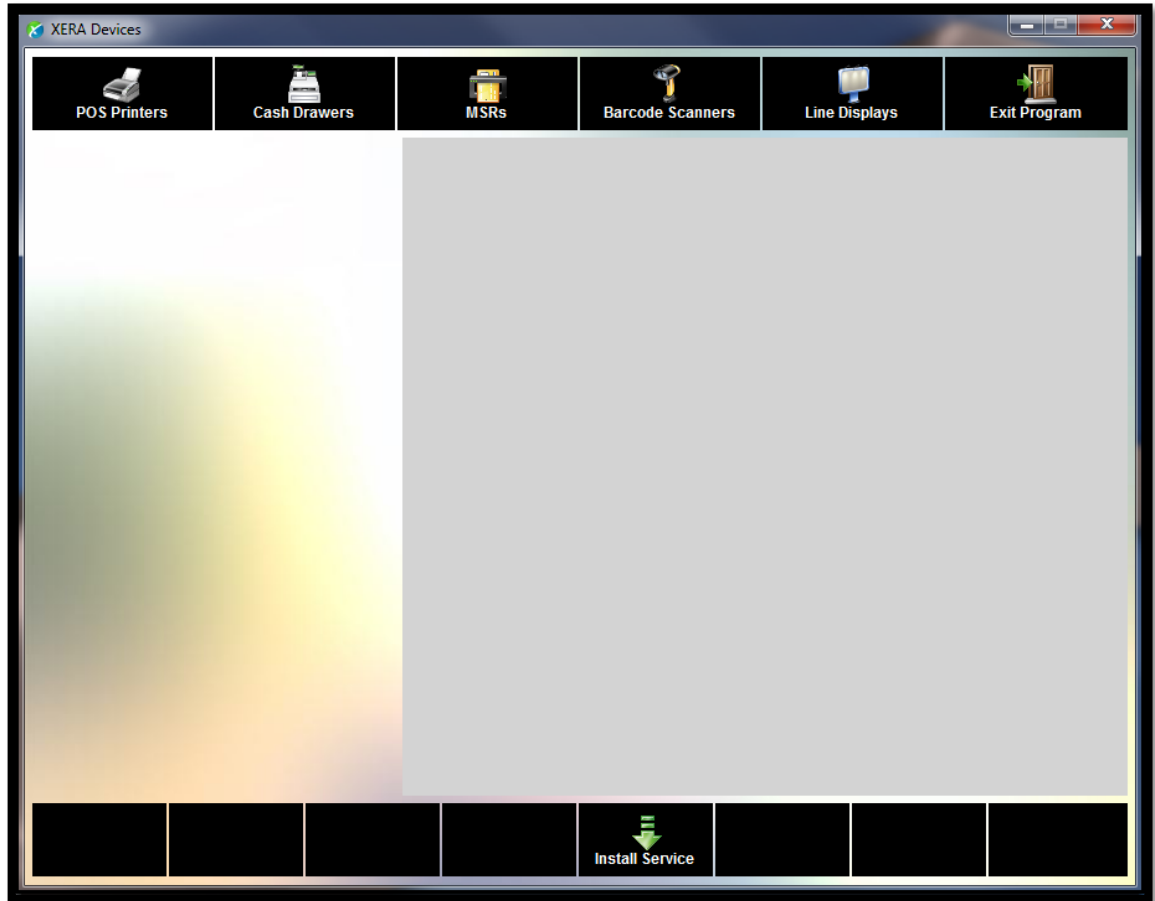


Figure 6-2

Installing the Service

From the main screen of the XERA® Device Manager, click the *Install Service* button. On the installation confirmation window that displays, click the *Yes* button to begin installing the service (See Figure 6-3).

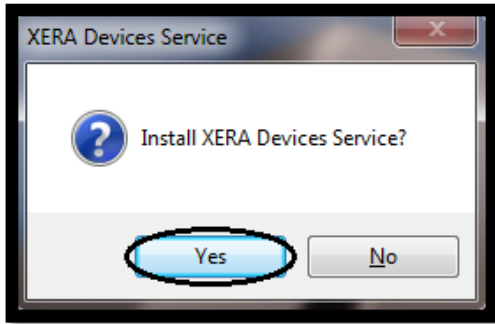


Figure 6-3

The installation proceeds automatically, without user intervention. Two services install: the XERA Devices Core Service and the XERA Devices KBP (Kitchen Bar Printer) Service.

Upon completion, the Install XERA Devices Core Service Successful message displays. Click the *OK* button to dismiss this message (See Figure 6-4).

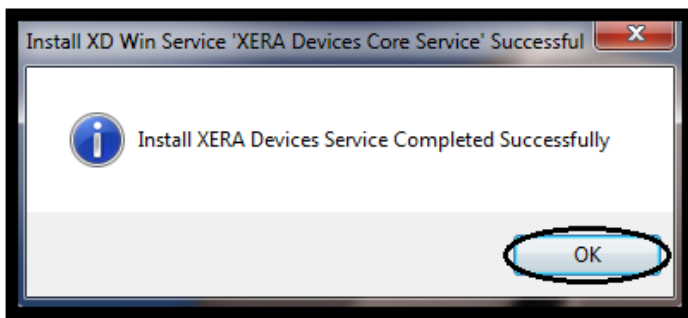


Figure 6-4

Immediately following the dismissal of the above message, the Install XERA Devices KBP Service Successful message displays.

Click the *OK* button to dismiss this message and return to the main screen (See Figure 6-5).

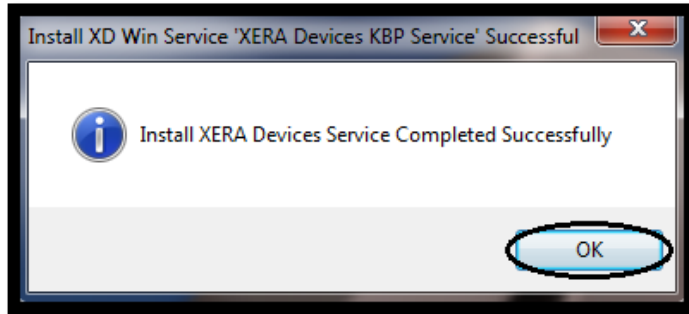


Figure 6-5

When the above message is dismissed, a series of nine additional Install XERA Devices KBP Service Successful messages appears, numbered one through nine. This is due to the fact that the XERA[®] Device Manager application installs ten individual instances of the KBP service on your computer so that each printer in your system may use its own instance so as to improve performance (a total of 99 instances may be installed). Dismiss each of these as it displays on your screen until no further messages appear.

Upon completion of the installation procedure, these services start automatically. To stop the service, restart the service, or uninstall the service, see the following sections; otherwise, to continue installing peripheral devices, skip ahead to the section titled “Installing a POS Printer,” later in this manual.

Stopping the Service

To stop the service, click the *Stop Service* button of the main screen (See Figure 6-6).

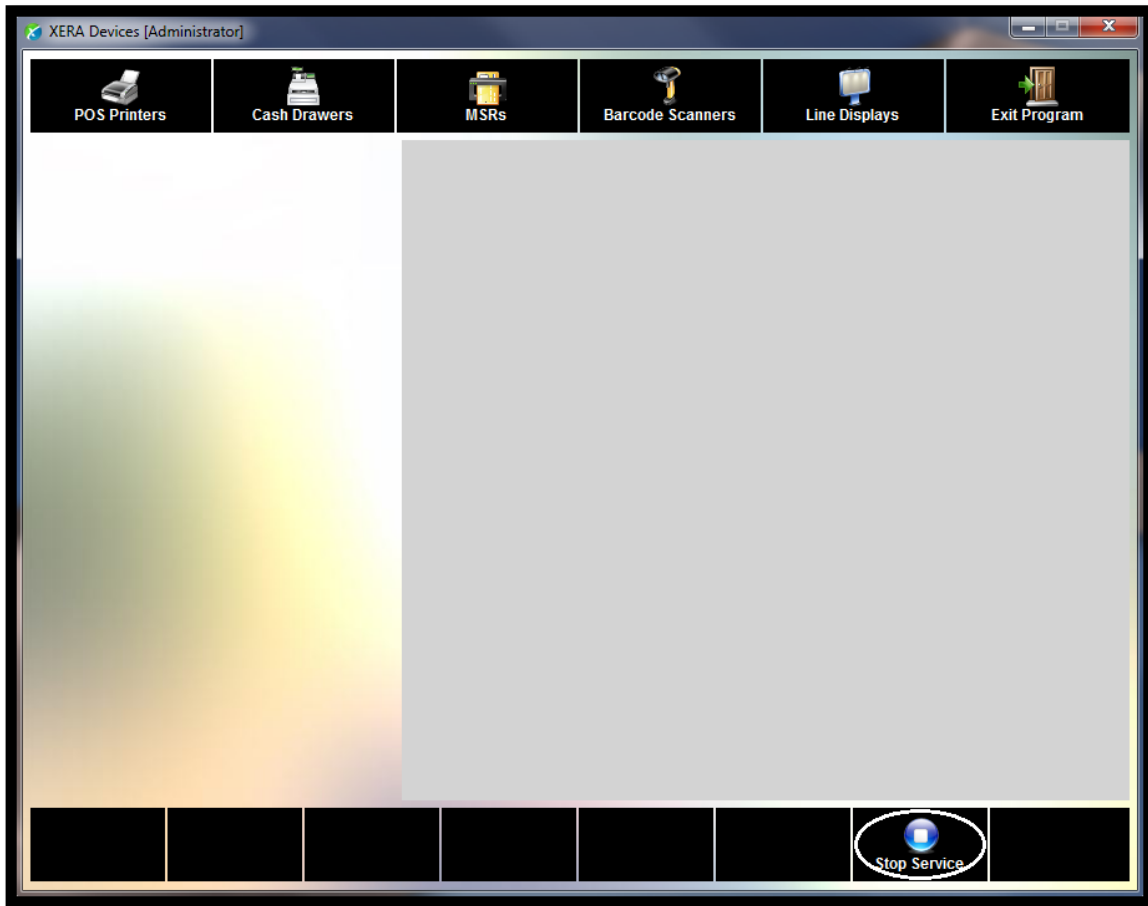


Figure 6-6

Next, on the Stop XERA Devices Service confirmation window that displays, click the *Yes* button to stop the service (See Figure 6-7).



Figure 6-7

Two services stop: the XERA Devices Core Service and the XERA Devices KBP Service. Upon completion, the Stop XERA Devices Core Service Successful message displays.

Click the *OK* button to dismiss this message and return to the main screen (See Figure 6-8).

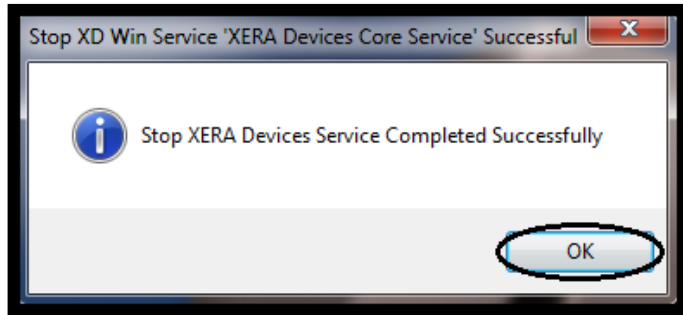


Figure 6-8

Starting the Service

To start the service, click the *Start Service* button of the main screen (See Figure 6-9).

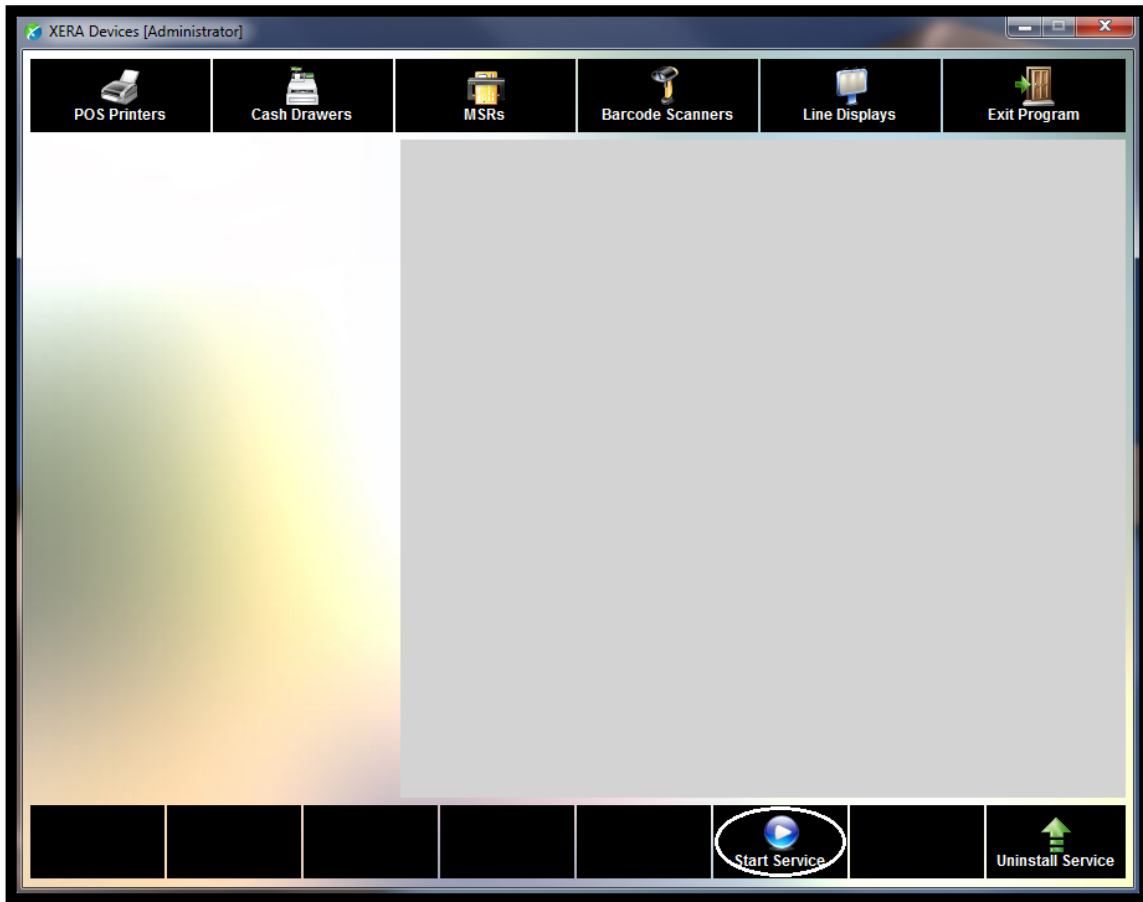


Figure 6-9

Next, on the Start XERA Devices Service confirmation window that displays, click the *Yes* button to start the service (See Figure 6-10).

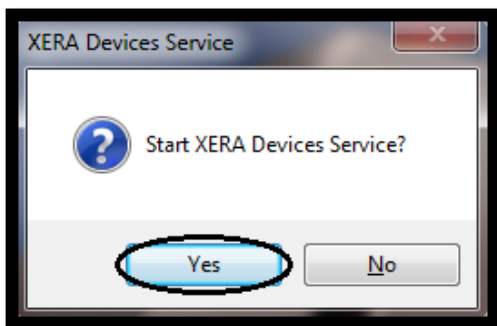


Figure 6-10

Two services start: the XERA Devices Core Service and the XERA Devices KBP Service. Upon completion, the Start Devices Core Service Successful message displays.

Click the *OK* button to dismiss this message (See Figure 6-11).

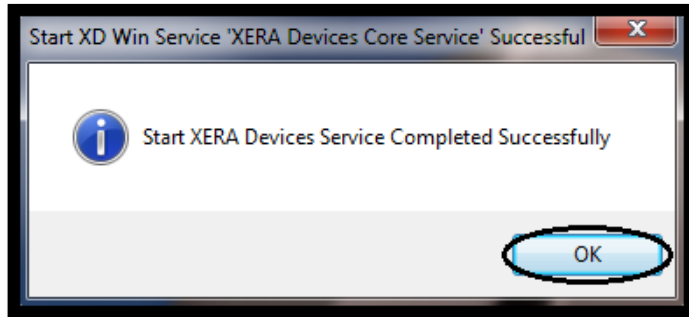


Figure 6-11

Uninstalling the Service

Please note that to uninstall the service, the service must be stopped. If the service is still running, stop the service as described previously in this manual before attempting to uninstall the service.

From the main screen of the XERA® Device Manager application, click the *Uninstall Service* button (See Figure 6-12).

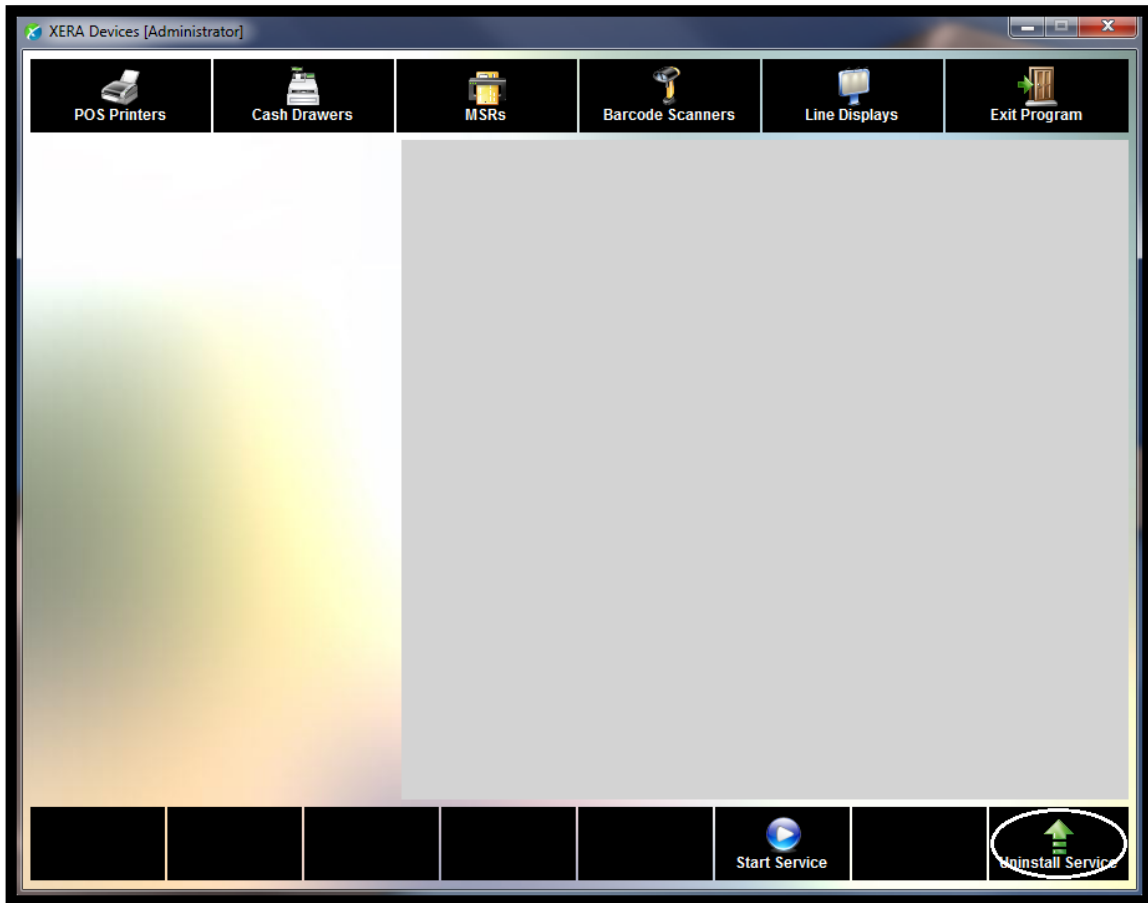


Figure 6-12

On the uninstall confirmation window that displays, click the *Yes* button to begin uninstalling the service (See Figure 6-13).

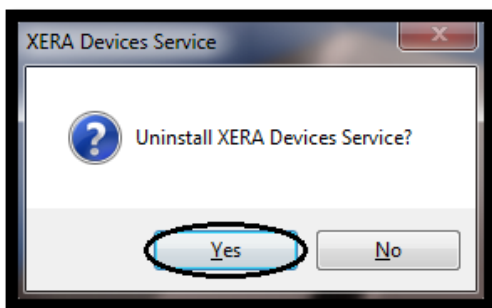


Figure 6-13

The uninstall proceeds automatically, without user intervention. Two services uninstall: the XERA Devices Core Service and the XERA Devices KBP Service. Upon completion, the Uninstall XERA Devices Core Service Successful message displays.

Click the *OK* button to dismiss this message (See Figure 6-14).

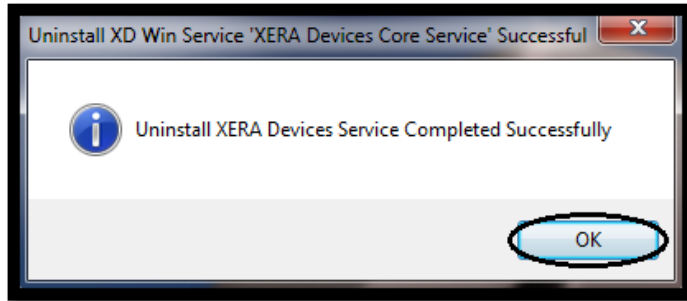


Figure 6-14

Immediately following the dismissal of the above message, the Uninstall XERA Devices KBP Service Successful message displays.

Click the *OK* button to dismiss this message and return to the main screen (See Figure 6-15).

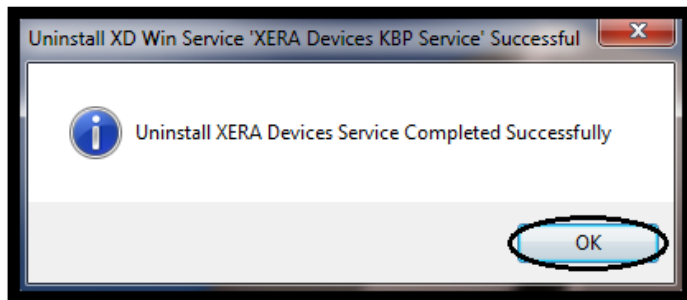


Figure 6-15

When the above message is dismissed, a series of nine additional Uninstall XERA Devices KBP Service Successful messages appears, numbered one through nine. This is because the XERA[®] Device Manager application uninstalls all ten individual instances of the KBP service on your computer that were installed previously. Dismiss each of these as it displays on your screen until no further messages appear.

Upon completion of the uninstall procedure, the XERA[®] Device Manager must be restarted.

INSTALLING A POS PRINTER

From the main screen of the XERA® Device Manager application, click the *POS Printers* button.

Next, click the *Add Device* button at the bottom of the screen (See Figure 6-16).

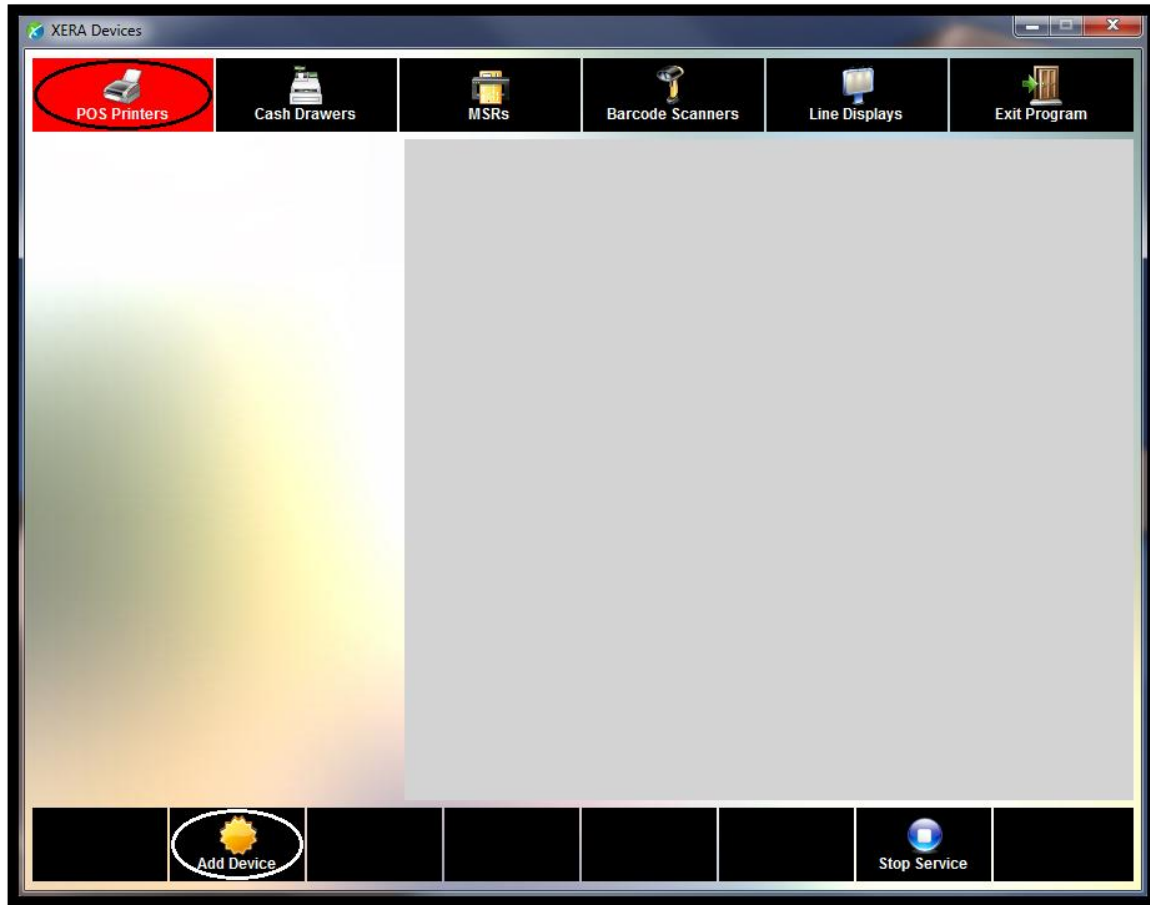


Figure 6-16

The Logical Device Selection screen displays. Select the printer that you wish to install by clicking on its logical device name button in the grid (See Figure 6-17).

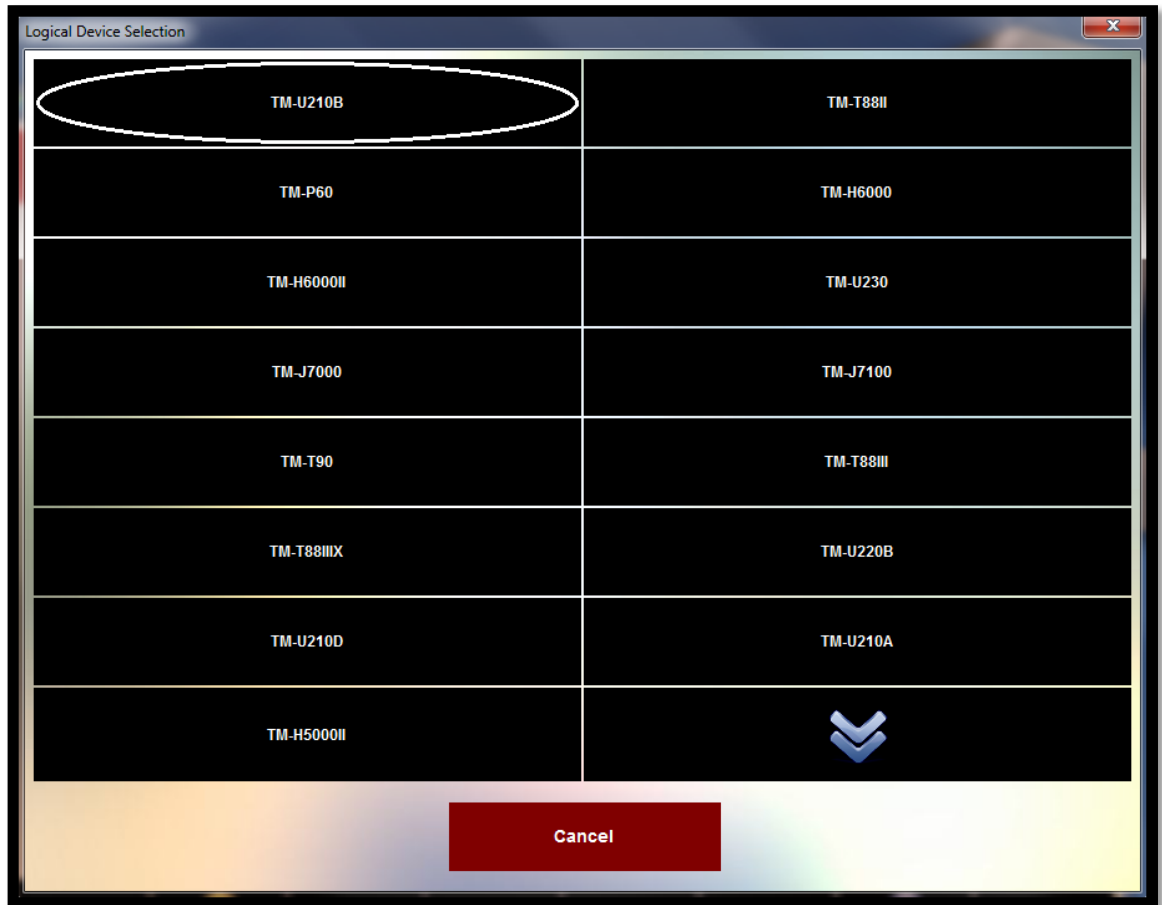


Figure 6-17

Next, the POS Printer Configuration screen appears (See Figure 6-18).

Figure 6-18

Follow the steps below to configure your POS printer.

Logical Device Name

The Logical Device Name is not editable. The text that appears in the upper-left corner of this field is captured from the driver.

Target Printer Service

The *Target Printer Service* button allows the user to select the printer service to use with the selected printer. If this printer will be used with a point-of-sale terminal, the Core Printing Service should be used. To use the Core Printing Service (the default), no entry is required.

If this printer will be used to print orders for preparation in the kitchen or bar, the KBP Printing Service should be used.

To use the KBP Printing Service, determine the instance number of the KBP service to use with this printer. Recall that ten individual instances (numbered 0-9) of the KBP service install when the Install Service procedure is performed.

Click the *Target Printer Service* button, enter the instance number via the virtual keypad that displays, and then click the keypad's *Enter* button. Please note that each printer must have a unique instance number.

Printer Claim Time Out Seconds

Select the number of seconds you wish to allow the system to attempt to claim the printer for XERA® POS. If the printer cannot be claimed by the number of seconds selected here, the printer claim process is aborted.

Make your selection by repeatedly clicking on the *Printer Claim Time Out Seconds* button until the desired number of seconds displays in the upper-left corner of the button. The available choices are from five to thirty seconds, inclusive, in increments of five seconds each.

Device is Receipt Printer

Consult your device manufacturer for information on configuration of your OPOS device.

Enable Transaction Print

Consult your device manufacturer for information on configuration of your OPOS device.

Printer Language Selection

If printing in Simplified Chinese, Traditional Chinese, Japanese, or Korean, click the *Printer Language Selection* button repeatedly until the appropriate language displays in the upper-left corner of the button. This feature installs the fonts required for printing in these languages. To print in any other language, select the "None" option.

Barcode Use Code 39

Reserved for future use.

Barcode Width

Reserved for future use.

Barcode Height

Reserved for future use.

Barcode Alignment

Reserved for future use.

Barcode Text Position

Reserved for future use.

***Cancel* Button**

Select the *Cancel* button to discard any changes you have made and return to the main screen of the XERA® Device Manager application.

***Done* Button**

When you finish setting up the POS printer, click the *Done* button to save your changes and return to the main screen of the XERA® Device Manager application.

The printer you just setup now displays in the button grid on the left side of the screen, indicating that it has been setup properly and is ready for use (See Figure 6-19).

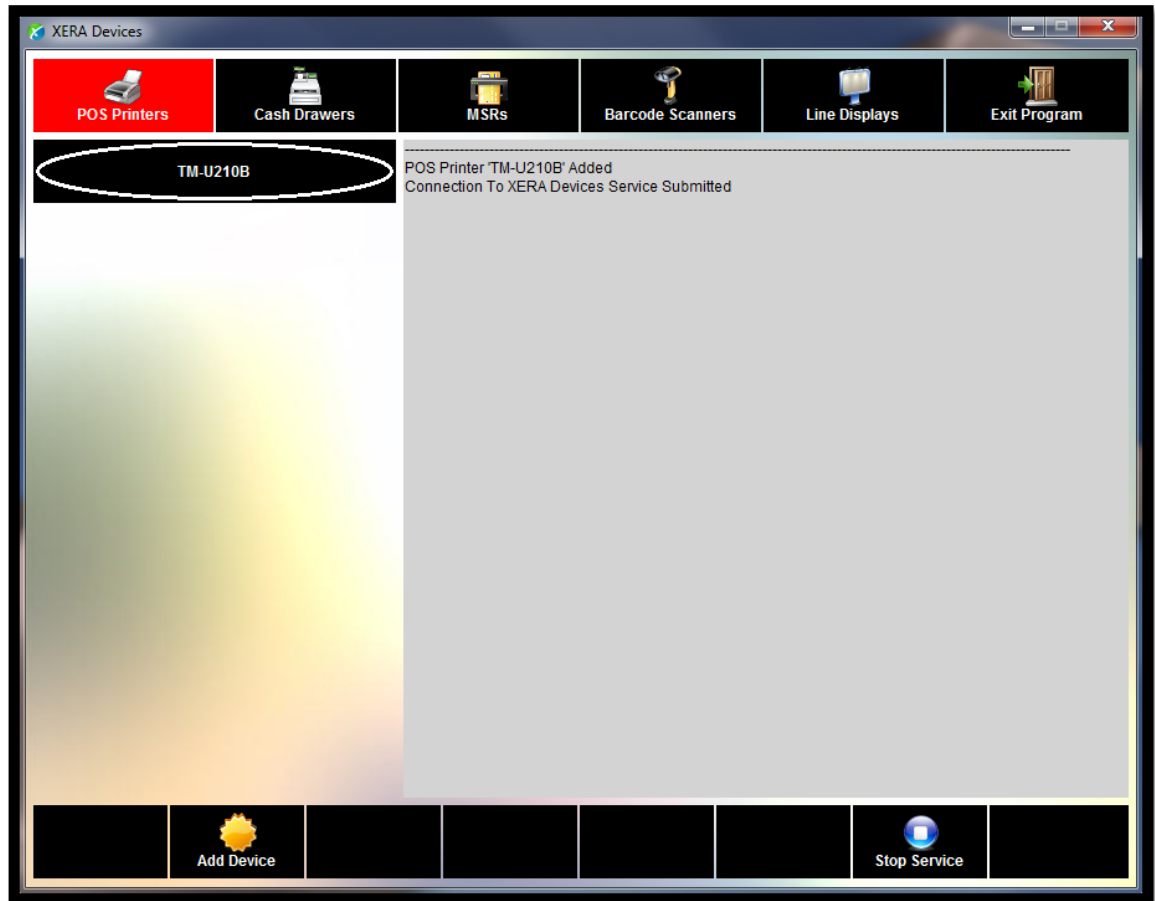


Figure 6-19

ADDITIONAL POS PRINTER FEATURES

To access the additional POS printer features, select a printer on the left side of the screen by clicking on its button.

The additional features appear as buttons at the bottom of the XERA® Devices main screen (See Figure 6-20).

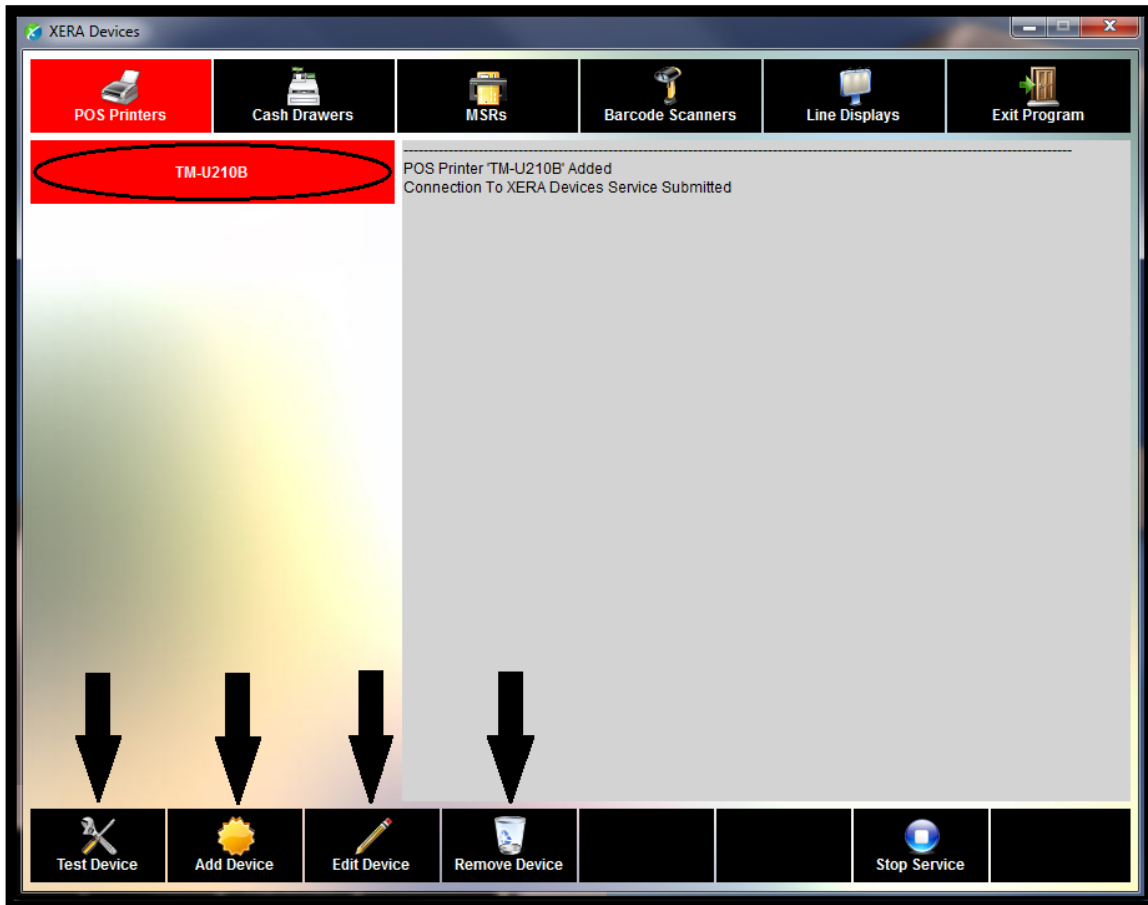


Figure 6-20

Test Device Button

After installing a printer, click the *Test Device* button to print a test receipt from the POS printer. If the test print is successful, then the printer is installed correctly. If you are unable to print a test receipt, remove the device and try reinstalling it.

Add Device Button

If you wish to install another POS printer, click the *Add Device* button and follow the instructions above to install the new device.

Edit Device Button

If you need to make any changes to the POS printer configuration, click the *Edit Device* Button, make the necessary changes, and then click the *Done* button on the POS Printer Configuration screen.

Remove Device Button

To delete a printer from the list of installed devices in the grid on the left side of the screen, select the device's button and then click the *Remove Device* button.

INSTALLING A CASH DRAWER

From the main screen of the XERA® Device Manager application, click the *Cash Drawers* button and then click the *Add Device* button (See Figure 6-21).

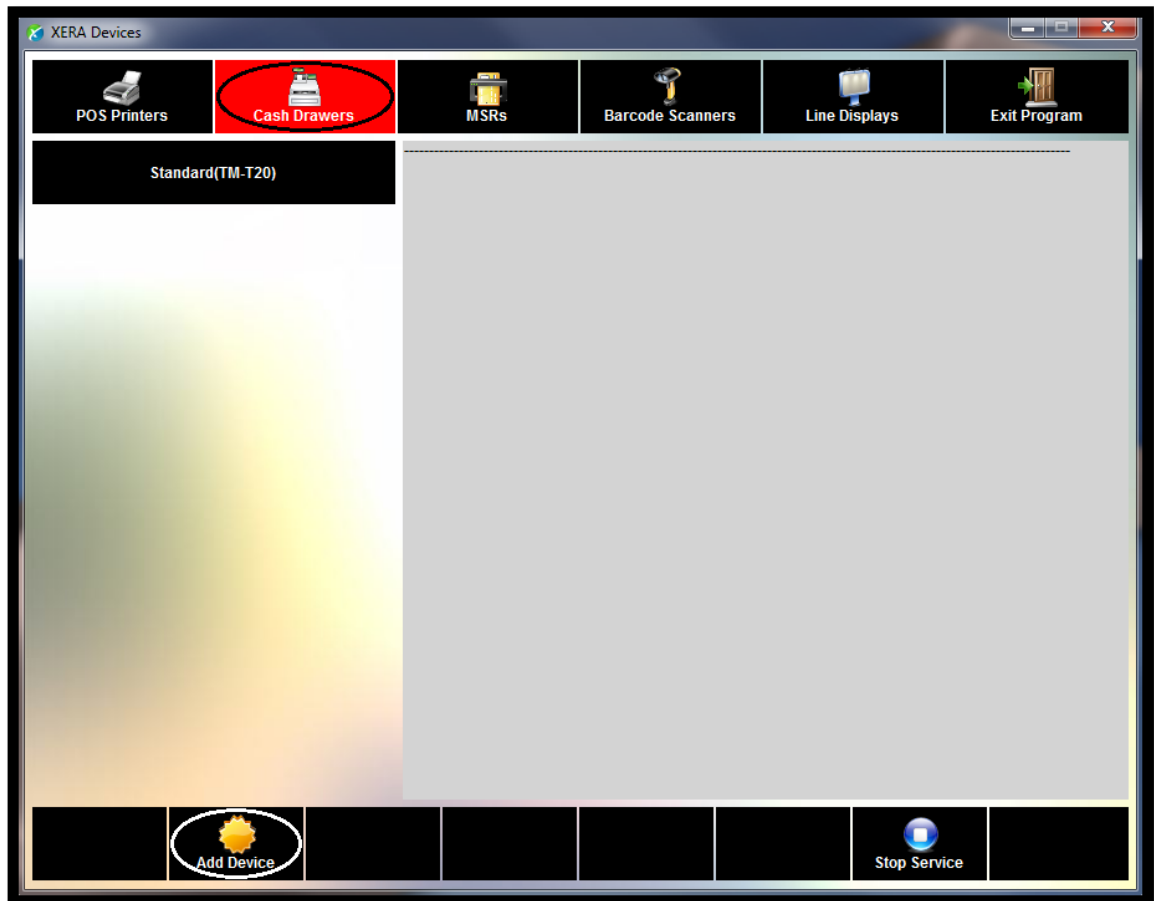


Figure 6-21

The Logical Device Selection screen displays. Select the cash drawer that you wish to install by clicking on its logical device name button in the grid (See Figure 6-22).

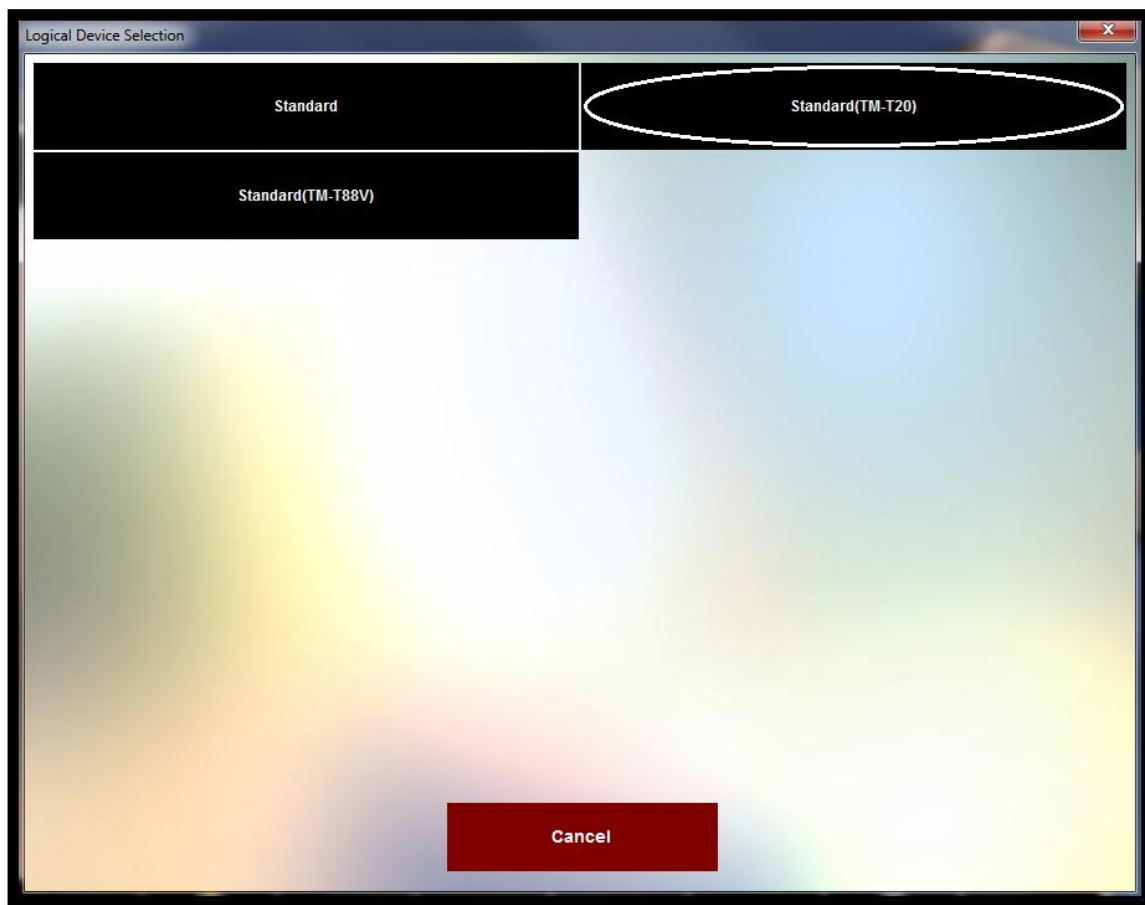


Figure 6-22

Next, the Cash Drawer Configuration screen appears (See Figure 6-23).

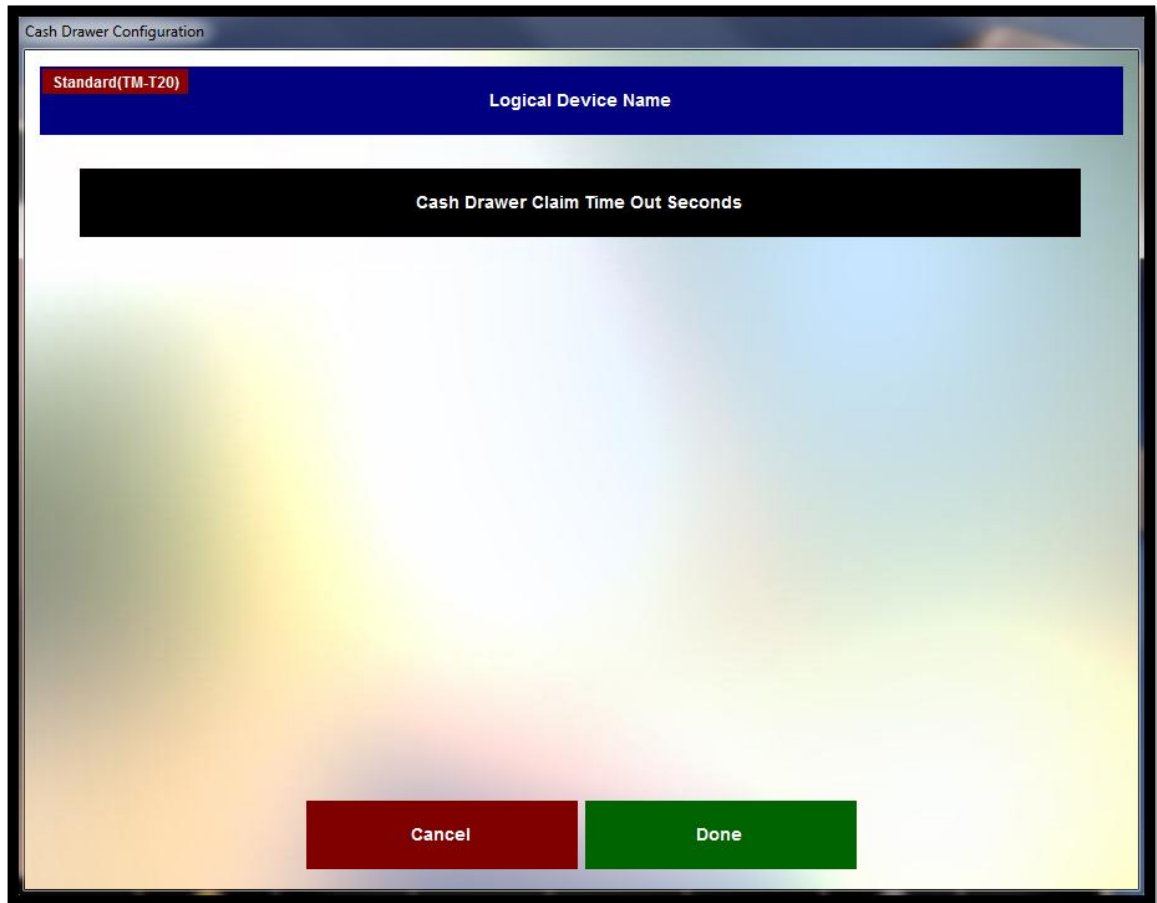


Figure 6-23

Follow the steps below to configure your cash drawer.

Logical Device Name

The Logical Device Name is not editable. The text that appears in the upper-left corner of this field is captured from the driver.

Cash Drawer Claim Time Out Seconds

Select the number of seconds you wish to allow the system to attempt to claim the cash drawer for XERA® POS. If the cash drawer cannot be claimed by the number of seconds selected here, the cash drawer claim process is aborted.

Make your selection by repeatedly clicking on the *Cash Drawer Claim Time Out Seconds* button until the desired number of seconds displays in the upper-left corner of the button. The available choices are from five to thirty seconds, inclusive, in increments of five seconds each.

Cancel Button

Select the *Cancel* button to discard any changes you have made and return to the main screen of the XERA® Device Manager application.

Done Button

When you finish setting up the cash drawer, click the *Done* button to save your changes and return to the main screen of the XERA® Device Manager application. The cash drawer you just setup now displays in the button grid on the left side of the screen, indicating that it has been setup properly and is ready for use (See Figure 6-24).

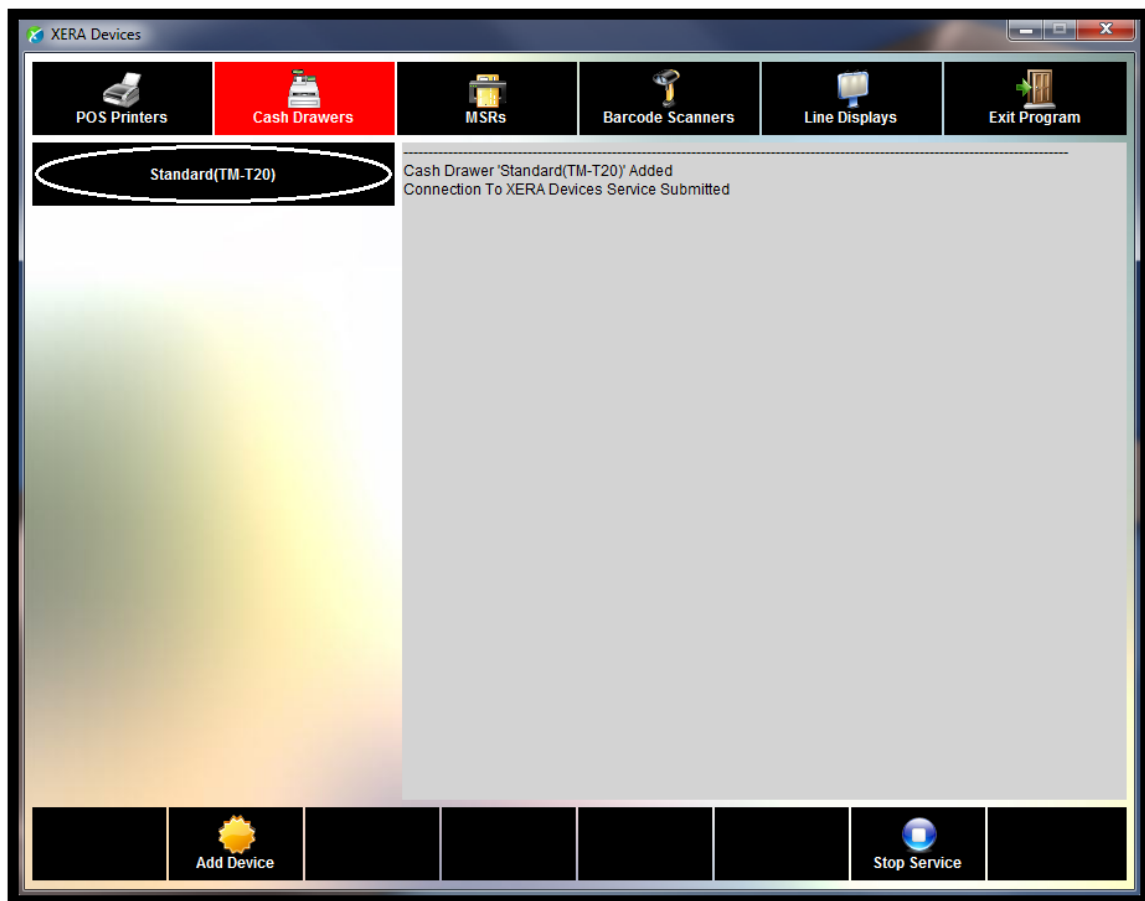


Figure 6-24

INSTALLING AN MSR (MAGNETIC STRIPE READER) DEVICE

From the main screen of the XERA[®] Device Manager application, click the *MSRs* button and then click the *Add Device* button (See Figure 6-25).

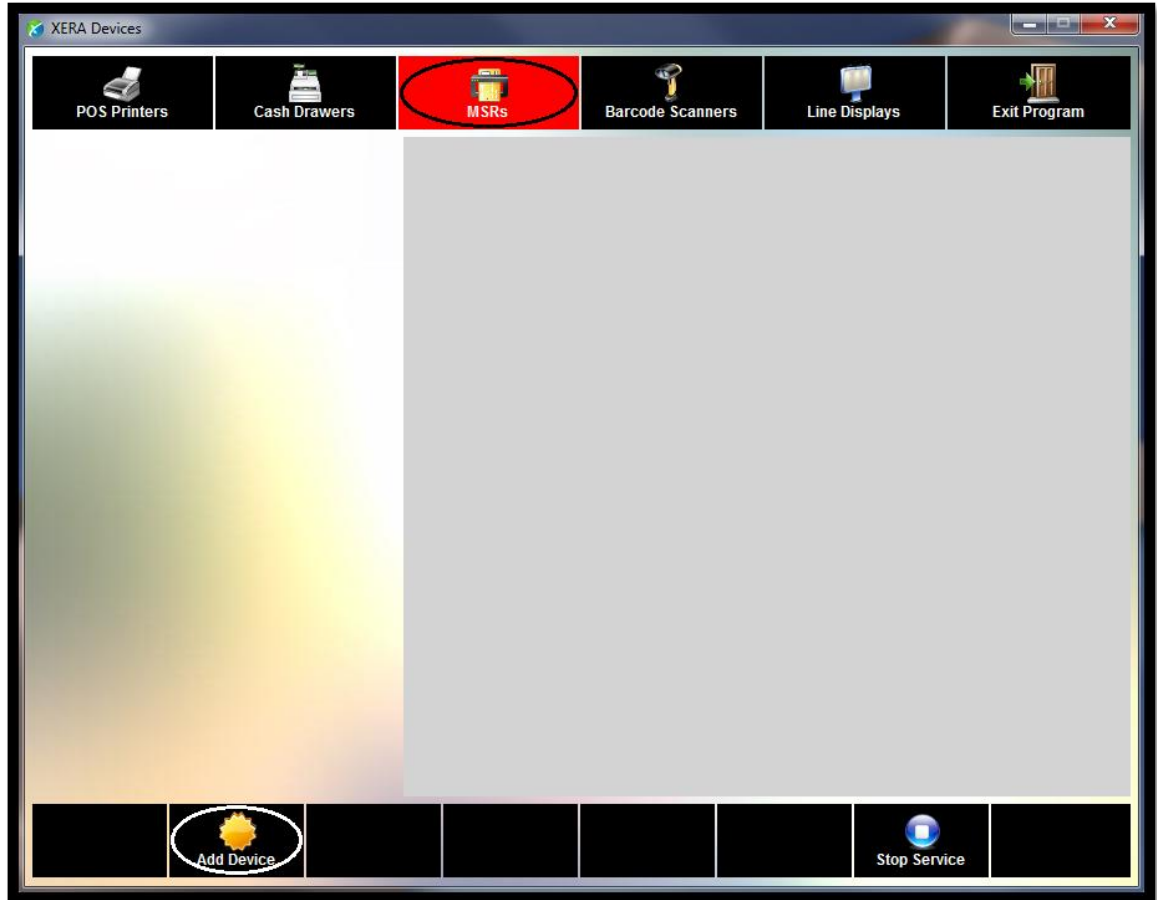


Figure 6-25

The Logical Device Selection screen displays. Select the MSR that you wish to install by clicking on its logical device name button in the grid (See Figure 6-26).

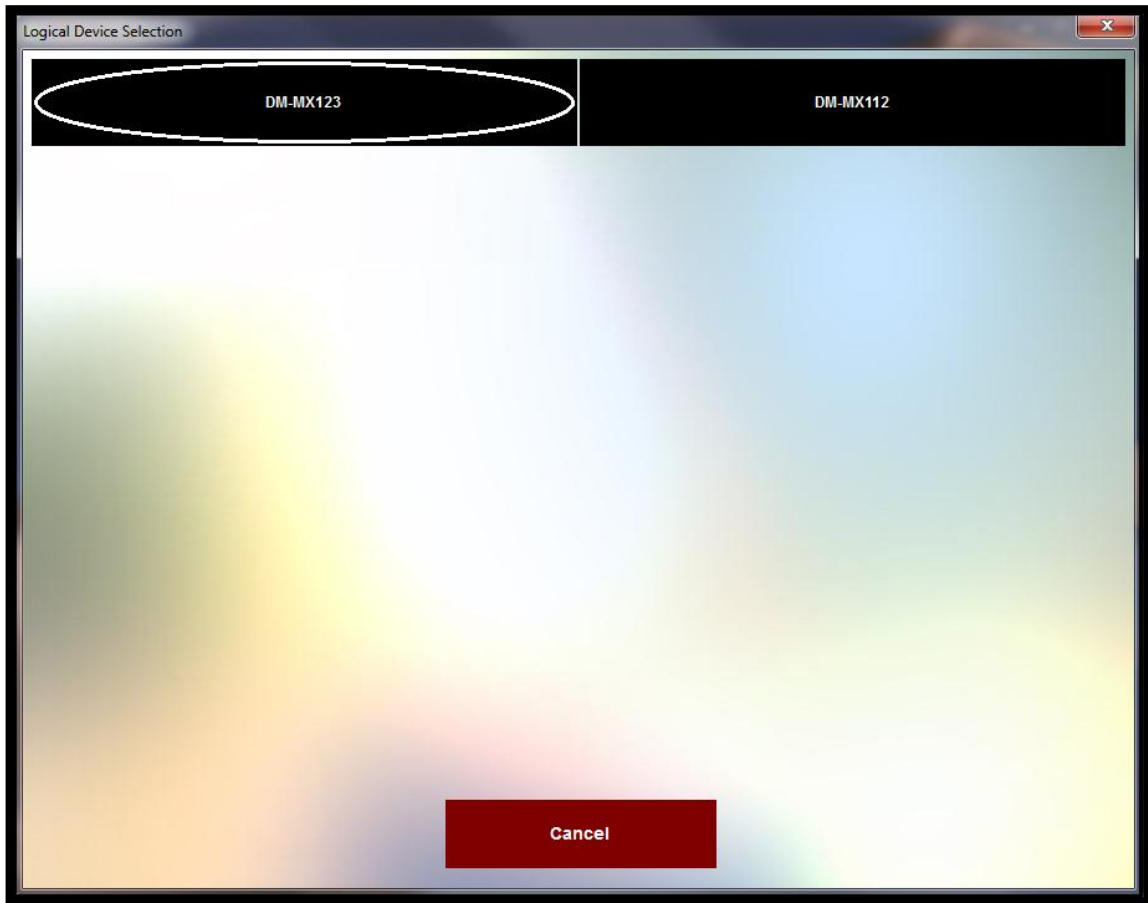


Figure 6-26

Next, the MSR Configuration screen appears (See Figure 6-27).

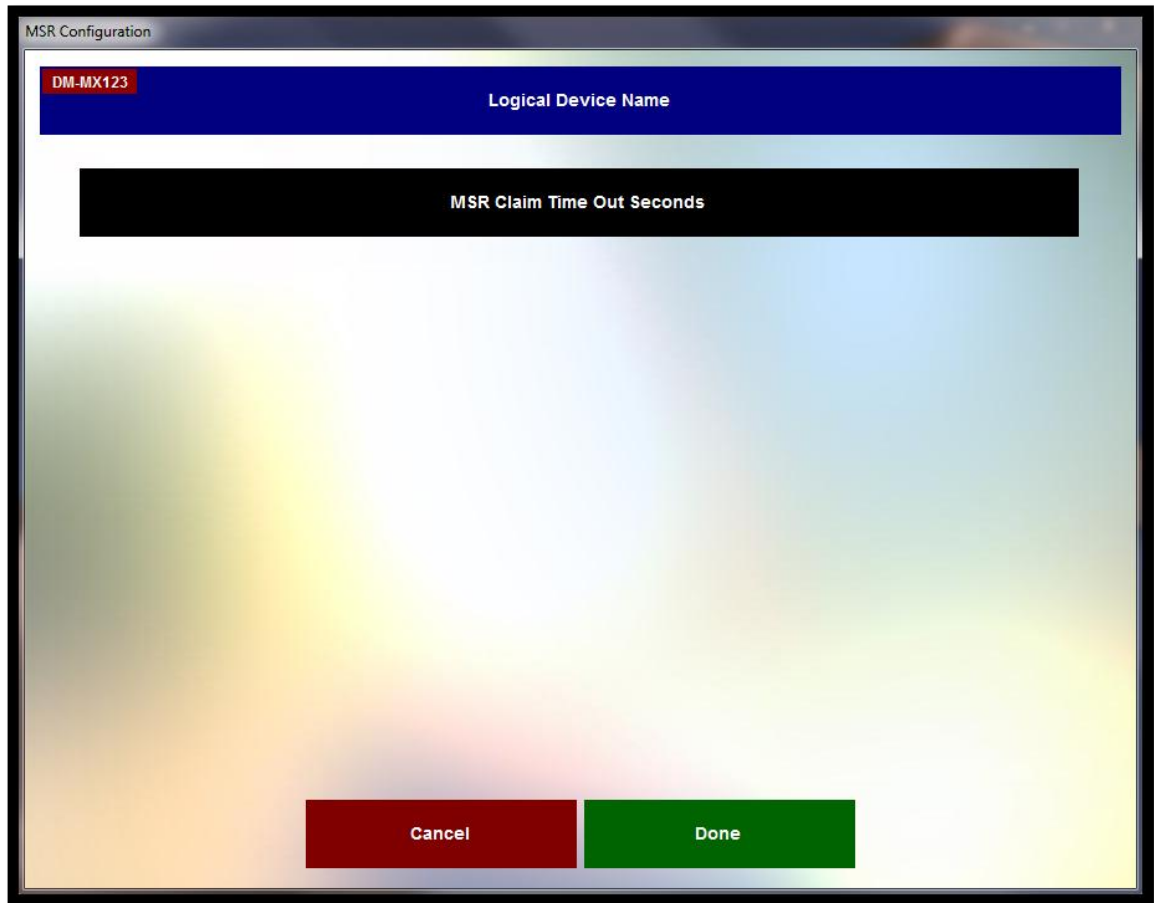


Figure 6-27

Follow the steps below to configure your MSR.

Logical Device Name

The Logical Device Name is not editable. The text that appears in the upper-left corner of this field is captured from the driver.

MSR Claim Time Out Seconds

Select the number of seconds you wish to allow the system to attempt to claim the MSR for XERA® POS. If the MSR cannot be claimed by the number of seconds selected here, the MSR claim process is aborted.

Make your selection by repeatedly clicking on the *MSR Claim Time Out Seconds* button until the desired number of seconds displays in the upper-left corner of the button. The available choices are from five to thirty seconds, inclusive, in increments of five seconds each.

Cancel Button

Select the *Cancel* button to discard any changes you have made and return to the main screen of the XERA® Device Manager application.

Done Button

When you finish setting up the MSR, click the *Done* button to save your changes and return to the main screen of the XERA® Device Manager application. The MSR you just setup now displays in the button grid on the left side of the screen, indicating that it has been setup properly and is ready for use (See Figure 6-28).

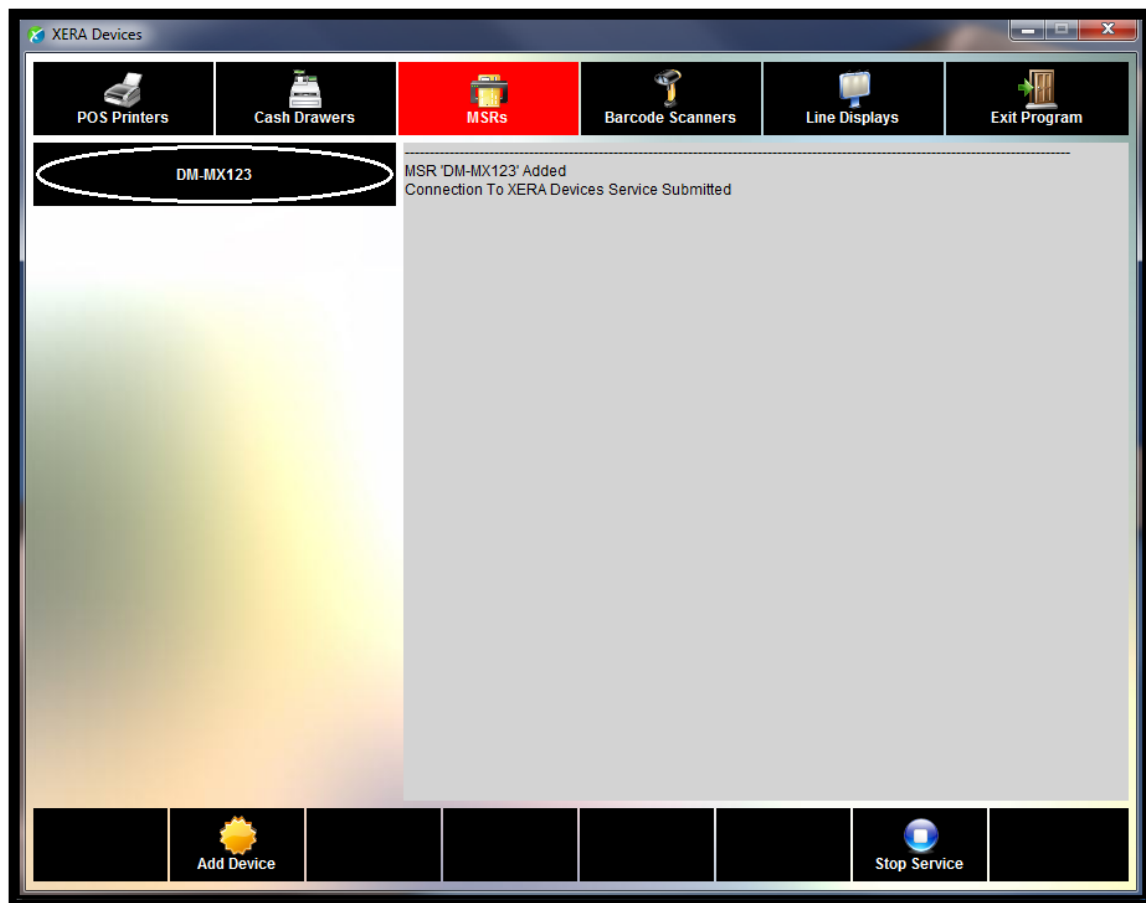


Figure 6-28

INSTALLING A BARCODE SCANNER

From the main screen of the XERA[®] Device Manager application, click the *Barcode Scanners* button and then click the *Add Device* button (See Figure 6-29).

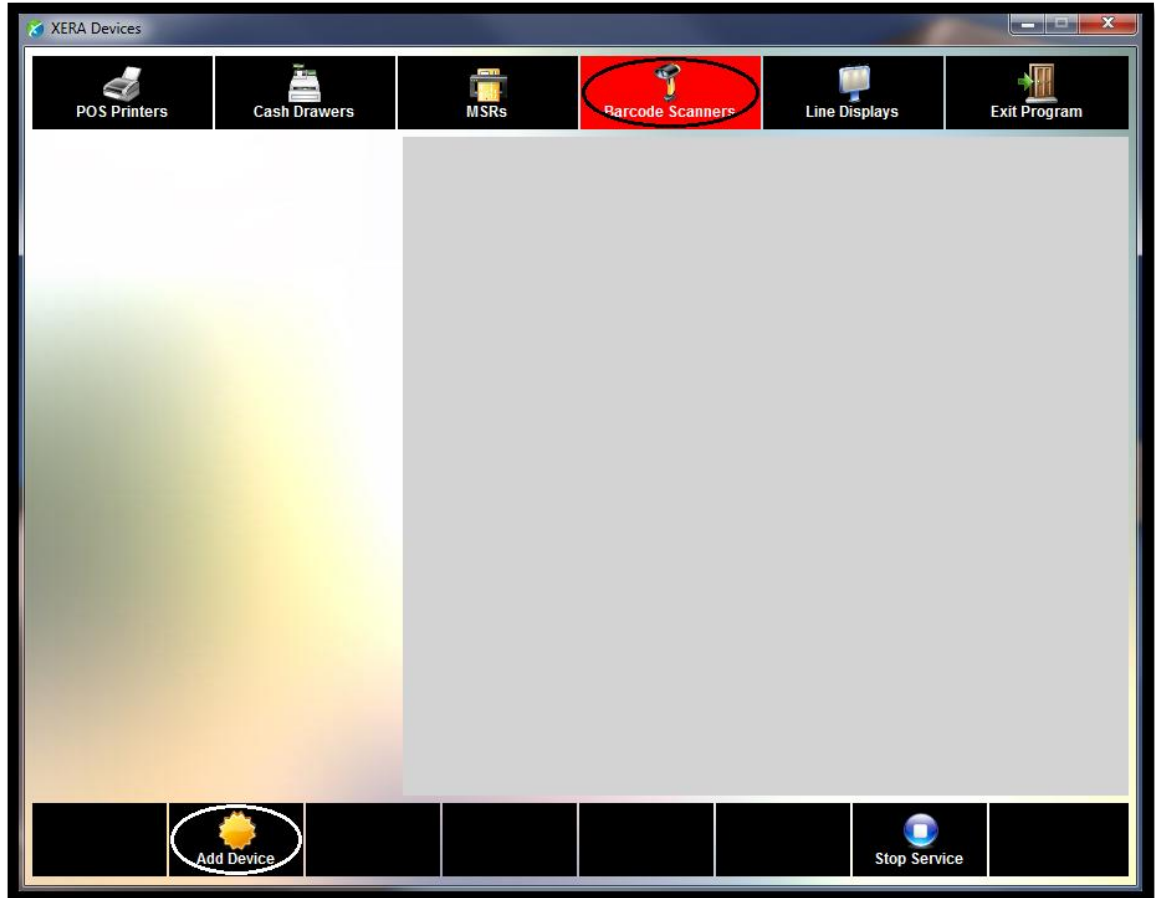


Figure 6-29

The Logical Device Selection screen displays. Select the barcode scanner that you wish to install by clicking on its logical device name button in the grid (See Figure 6-30).

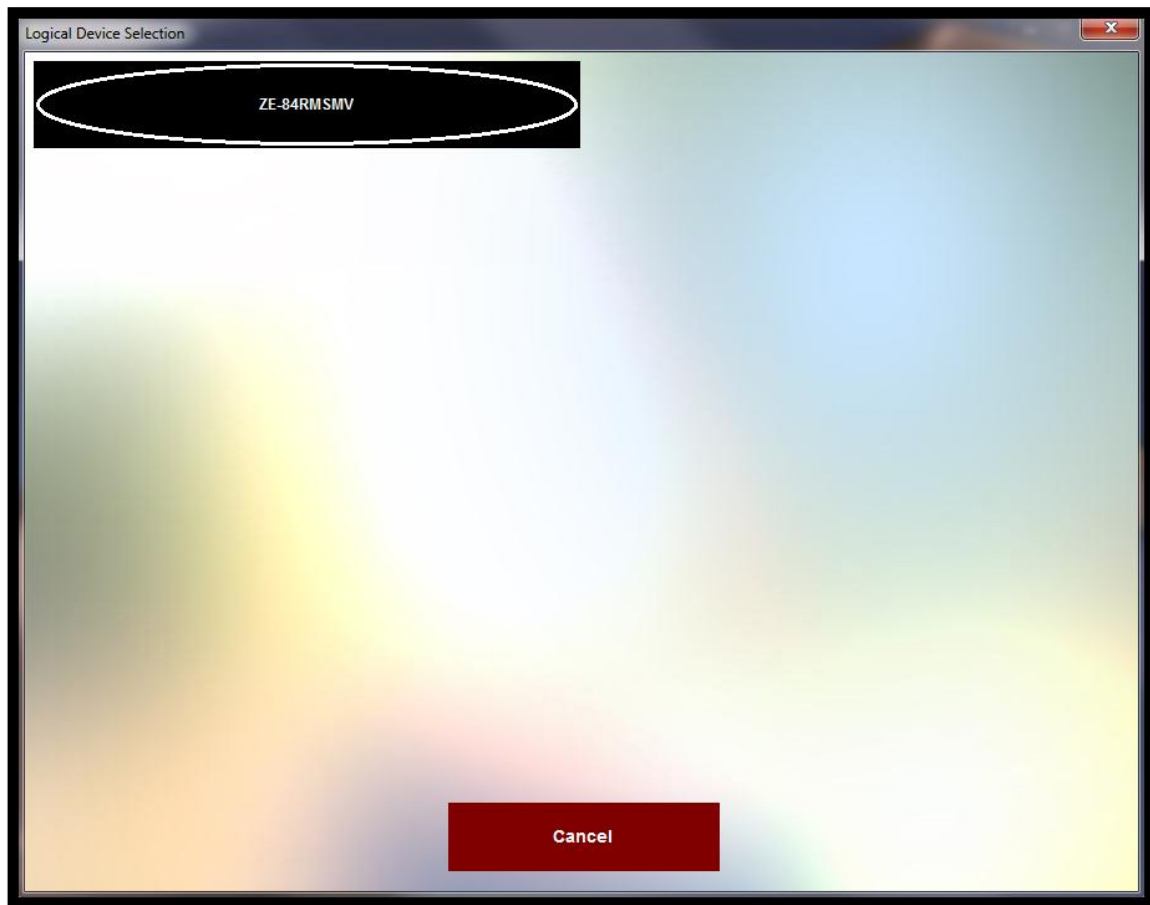


Figure 6-30

Next, the Barcode Scanner Configuration screen appears (See Figure 6-31).

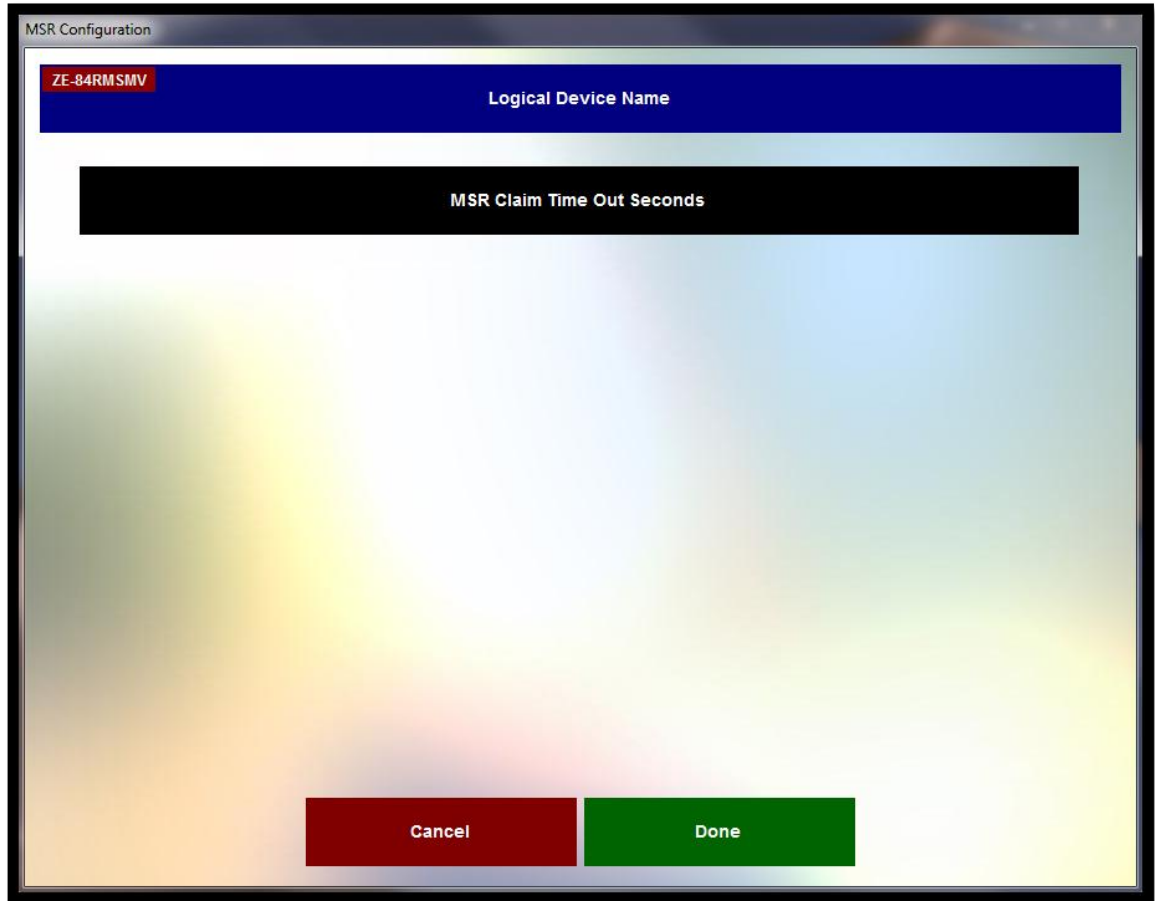


Figure 6-31

Follow the steps below to configure your barcode scanner.

Logical Device Name

The Logical Device Name is not editable. The text that appears in the upper-left corner of this field is captured from the driver.

Barcode Scanner Claim Time Out Seconds

Select the number of seconds you wish to allow the system to attempt to claim the barcode scanner for XERA[®] POS. If the barcode scanner cannot be claimed by the number of seconds selected here, the barcode scanner claim process is aborted.

Make your selection by repeatedly clicking on the *Barcode Scanner Claim Time Out Seconds* button until the desired number of seconds displays in the upper-left corner of the button. The available choices are from five to thirty seconds, inclusive, in increments of five seconds each.

Cancel Button

Select the *Cancel* button to discard any changes you have made and return to the main screen of the XERA® Device Manager application.

Done Button

When you finish setting up the barcode scanner, click the *Done* button to save your changes and return to the main screen of the XERA® Device Manager application. The barcode scanner you just setup now displays in the button grid on the left side of the screen, indicating that it has been setup properly and is ready for use (See Figure 6-32).

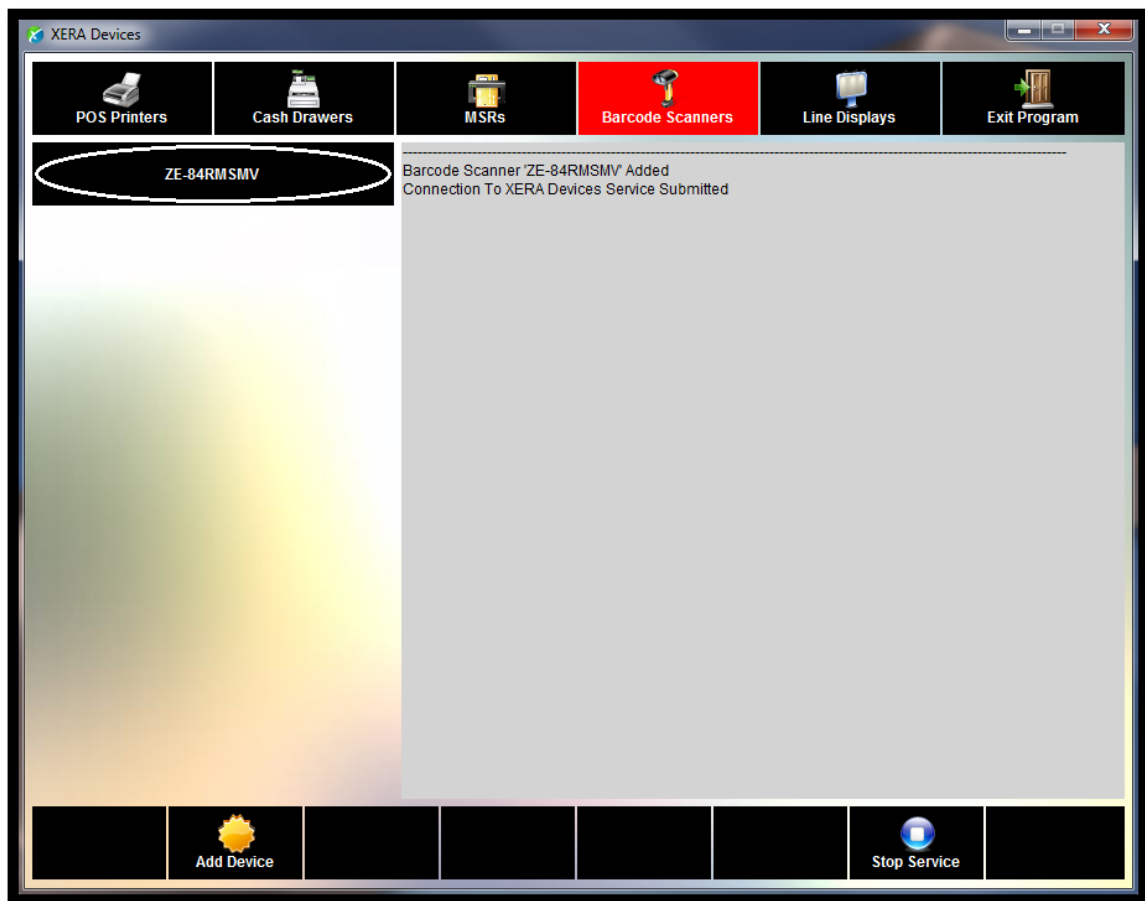


Figure 6-32

INSTALLING A LINE DISPLAY

From the main screen of the XERA[®] Device Manager application, click the *Line Displays* button and then click the *Add Device* button (See Figure 6-33).

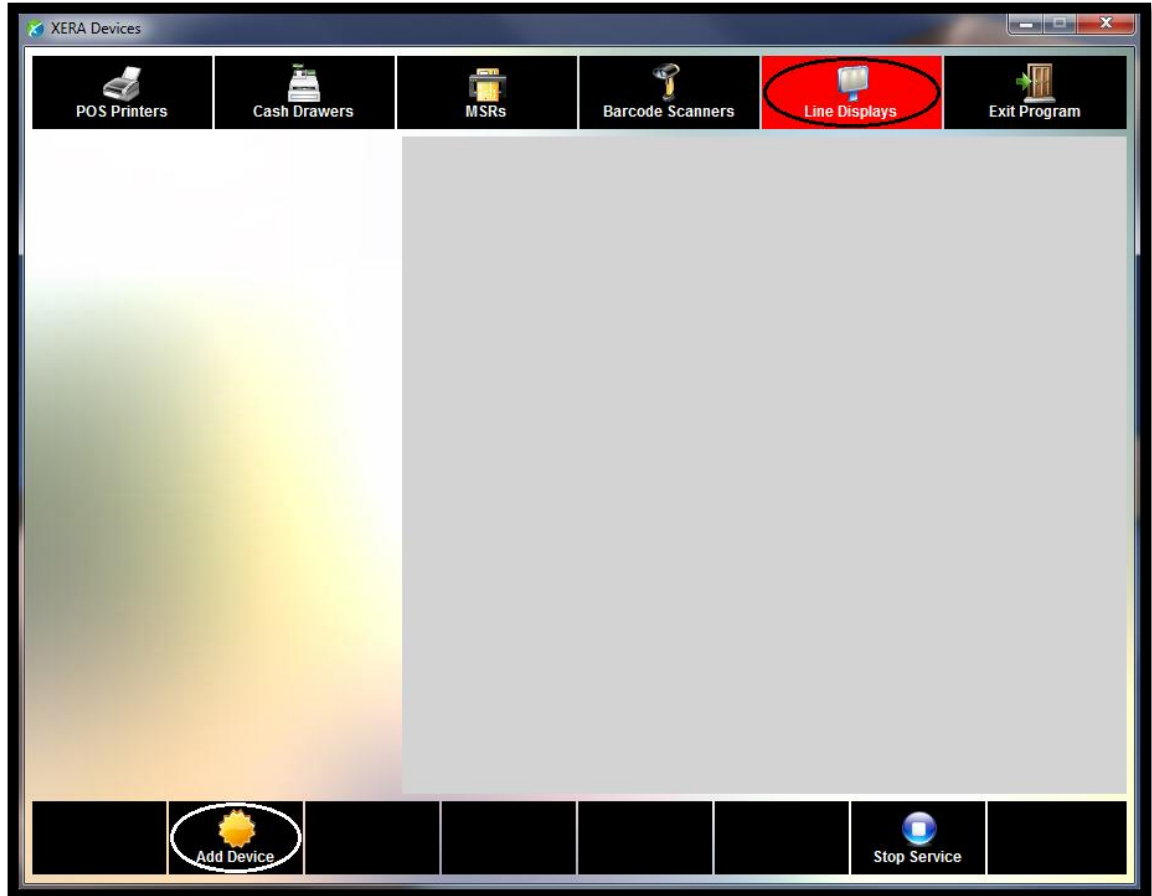


Figure 6-33

The Logical Device Selection screen displays. Select the line display that you wish to install by clicking on its logical device name button in the grid (See Figure 6-34).

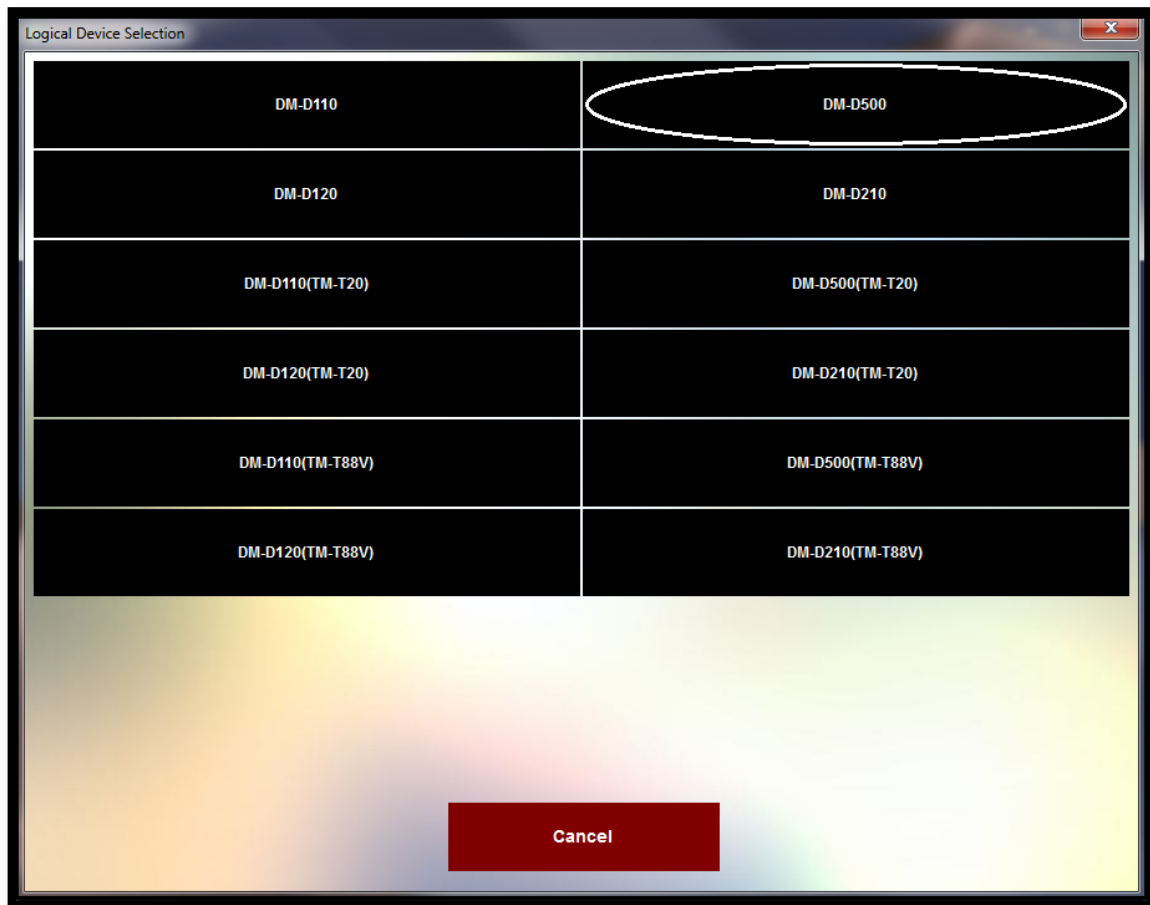


Figure 6-34

Next, the Line Display Configuration screen appears (See Figure 6-35).

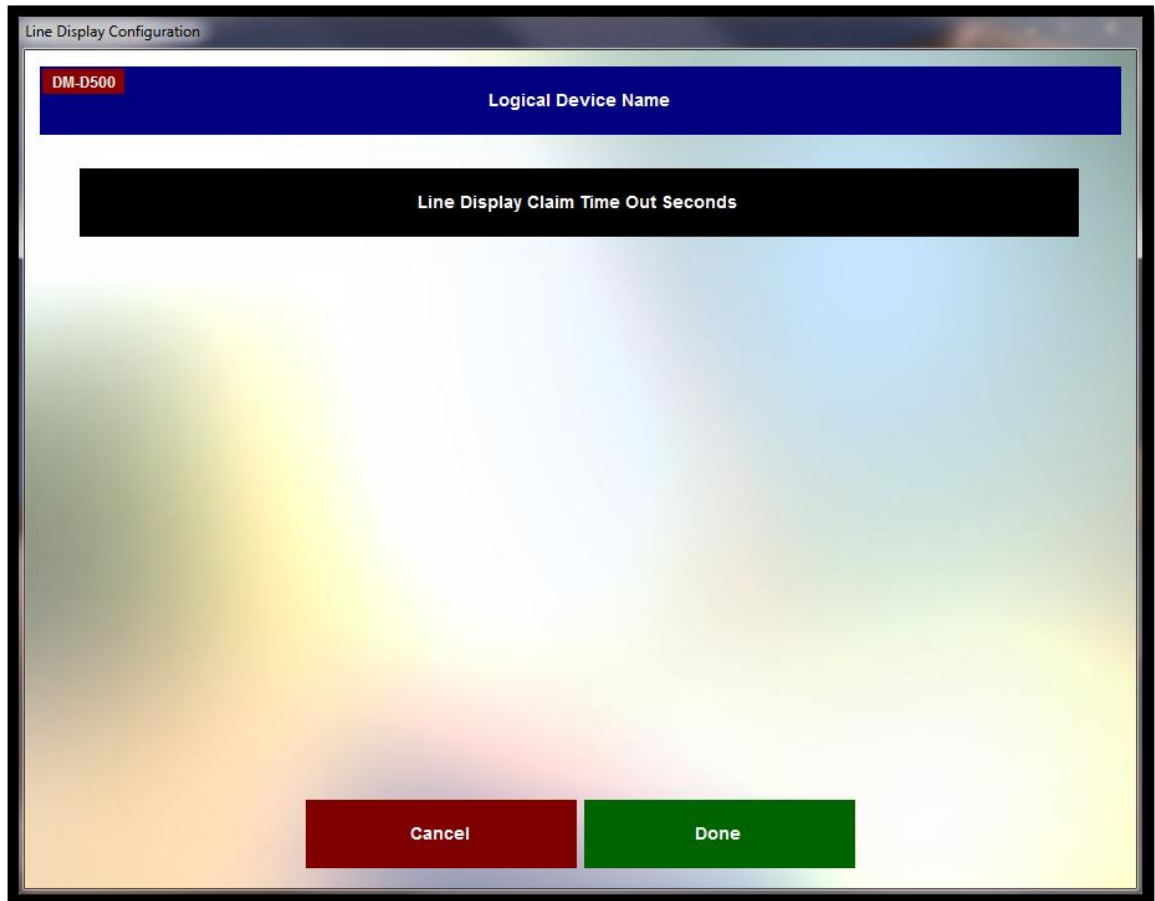


Figure 6-35

Follow the steps below to configure your line display.

Logical Device Name

The Logical Device Name is not editable. The text that appears in the upper-left corner of this field is captured from the driver.

Line Display Claim Time Out Seconds

Select the number of seconds you wish to allow the system to attempt to claim the line display for XERA® POS. If the line display cannot be claimed by the number of seconds selected here, the line display claim process is aborted.

Make your selection by repeatedly clicking on the *Line Display Claim Time Out Seconds* button until the desired number of seconds displays in the upper-left corner of the button. The available choices are from five to thirty seconds, inclusive, in increments of five seconds each.

Cancel Button

Select the *Cancel* button to discard any changes you have made and return to the main screen of the XERA® Device Manager application.

Done Button

When you finish setting up the line display, click the *Done* button to save your changes and return to the main screen of the XERA® Device Manager application. The line display you just setup now displays in the button grid on the left side of the screen, indicating that it has been setup properly and is ready for use (See Figure 6-36).

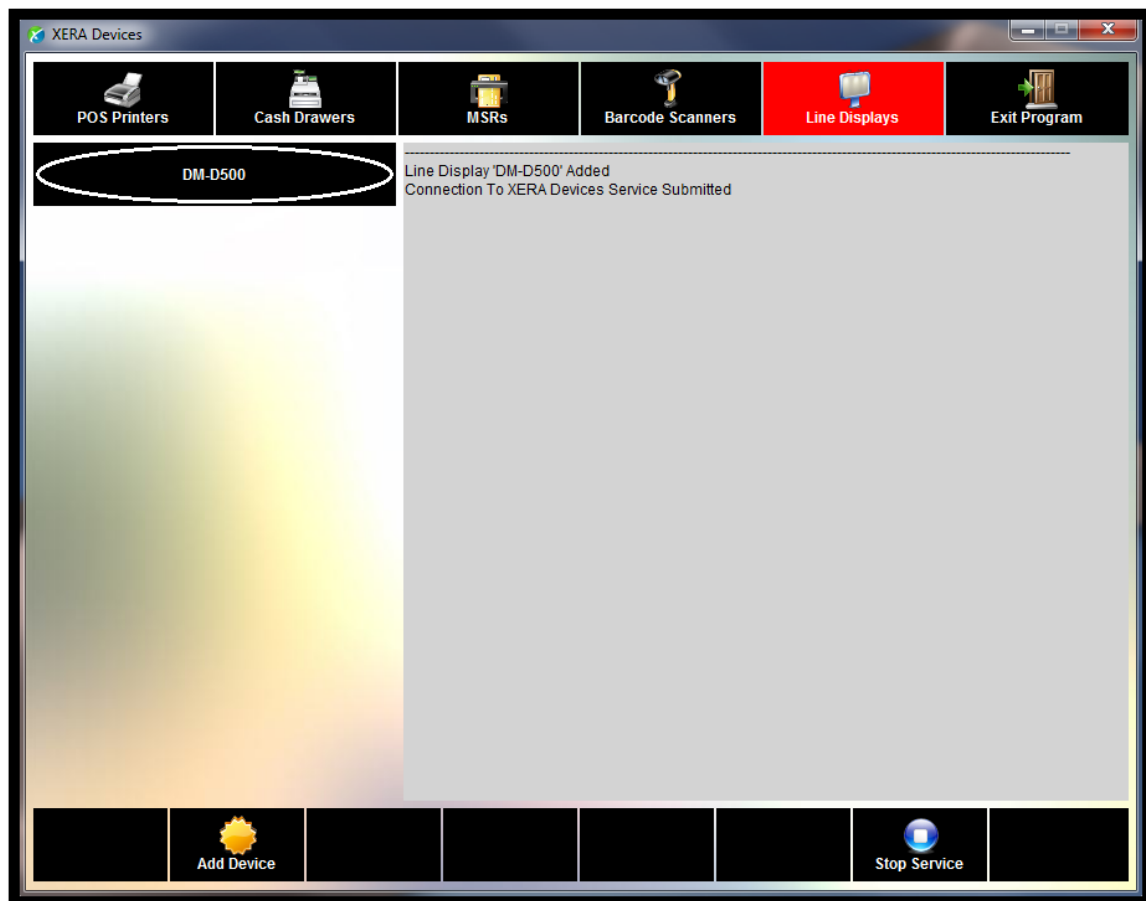


Figure 6-36

EXITING THE XERA® DEVICE MANAGER APPLICATION

Click the *Exit Program* button whenever you wish to close the XERA® Device Manager application (See figure 6-37).

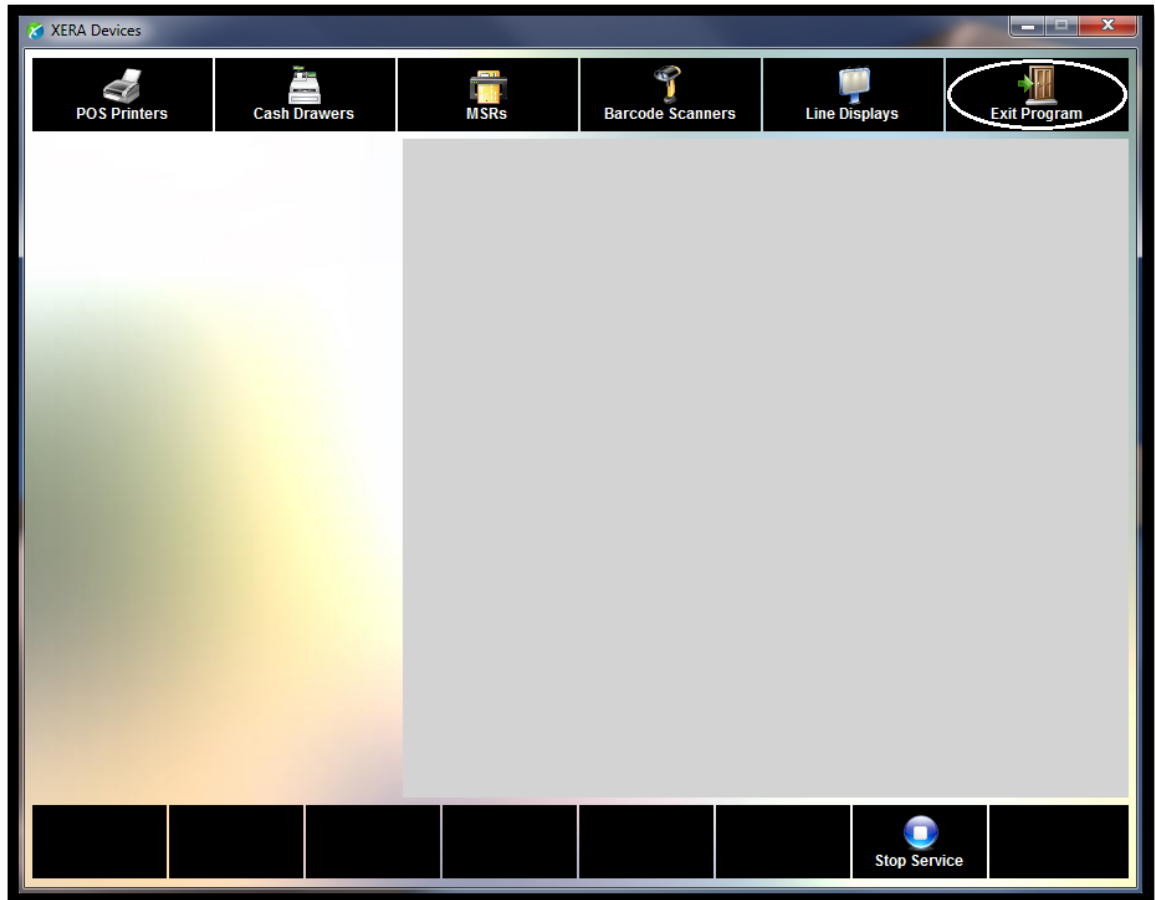


Figure 6-37

Chapter 7 — Database Setup

Configuring Microsoft SQL Server

With XERA® POS, you may use Microsoft SQL Server 2005, 2008, or 2012 (or the Express versions). These instructions describe the steps required to configure Microsoft SQL Server 2012. Configuration of the other versions should be similar.

SQL SERVER CONFIGURATION MANAGER

From your desktop, click on **Start > All Programs > Microsoft SQL Server 2012 > Configuration Tools >** and then click on the *SQL Server Configuration Manager* option in the list (See Figure 7-1).

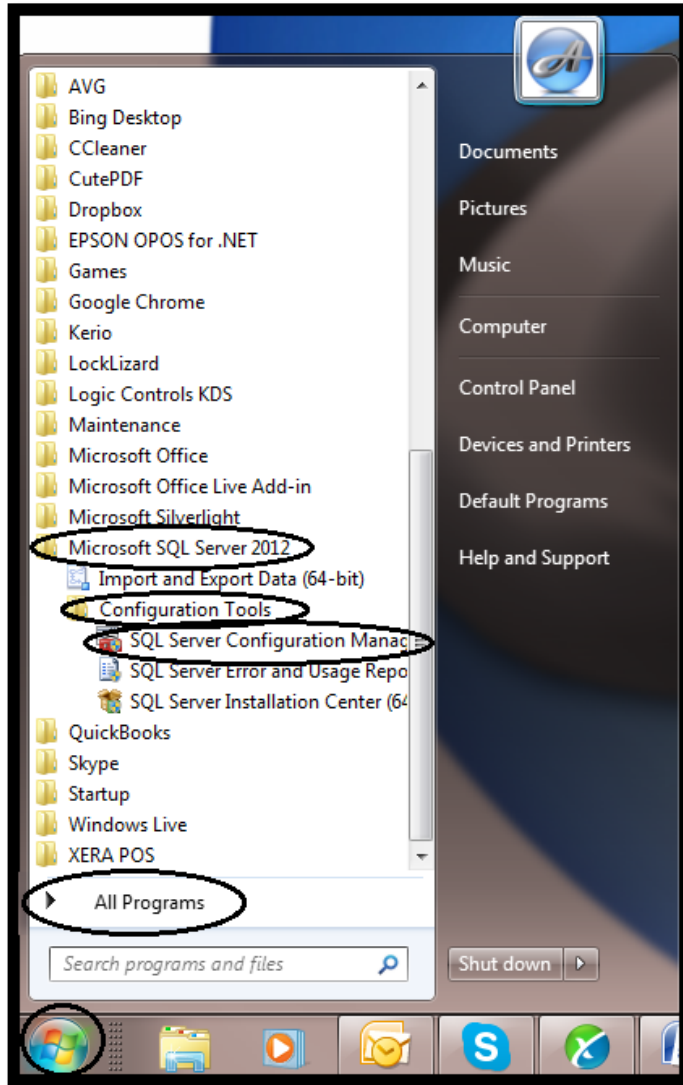


Figure 7-1

On the SQL Server Configuration Manager screen, click the *SQL Server Network Configuration* option on the left side of the screen and then click the *Protocols for SQLEXPRESS* sub-option. This displays the available protocols and their statuses in the panel on the right side of the screen (See Figure 7-2).

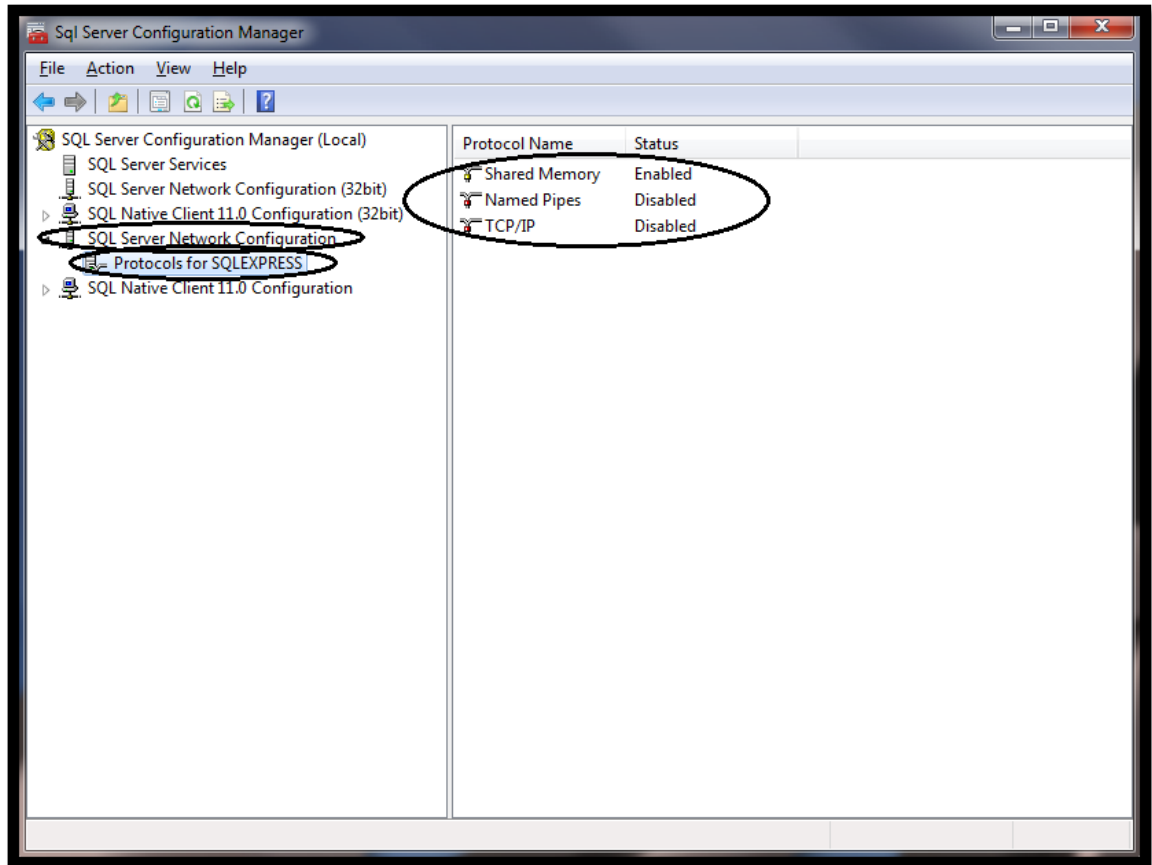


Figure 7-2

Next, double-click *TCP/IP* in the Protocol Name list to display the TCP/IP Properties window. Click the *arrow* button to the extreme right of the Enabled field. Select *Yes* from the dropdown list to enable TCP/IP communication.

Click the OK button when finished to save your changes (See Figure 7-3).

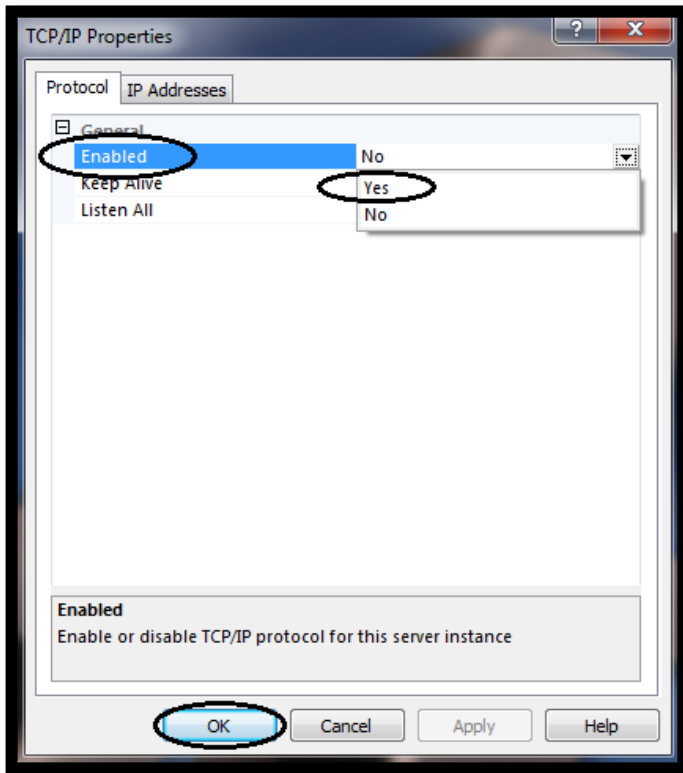


Figure 7-3

A warning message notifies the user that the changes do not take effect until the service is restarted. Click the *OK* button to dismiss the warning message and then stop and restart the service (See Figure 7-4).

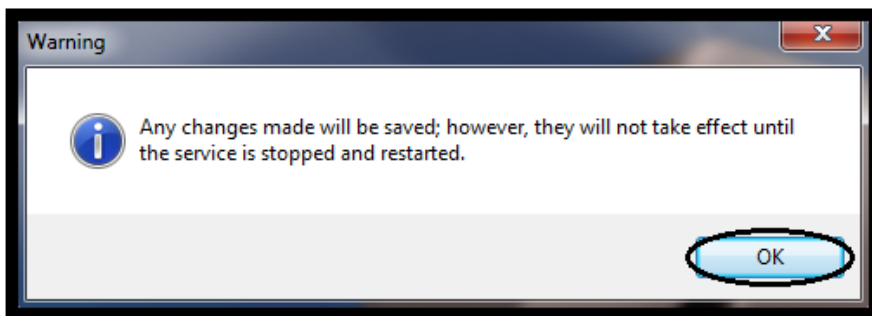


Figure 7-4

Next, click the *SQL Server Services* option on the left side of the screen. In the panel on the right side of the screen, double-click *SQL Server Browser* to display the SQL Server Browser Properties window. Click the Service Tab and verify that the Start Mode is set to “Automatic.” If it is not, click the *arrow* button to the extreme right of the Start Mode field and select *Automatic* from the list by clicking on it.

When finished, click the *OK* button to save your changes and close the SQL Server Browser Properties window (See Figure 7-5).

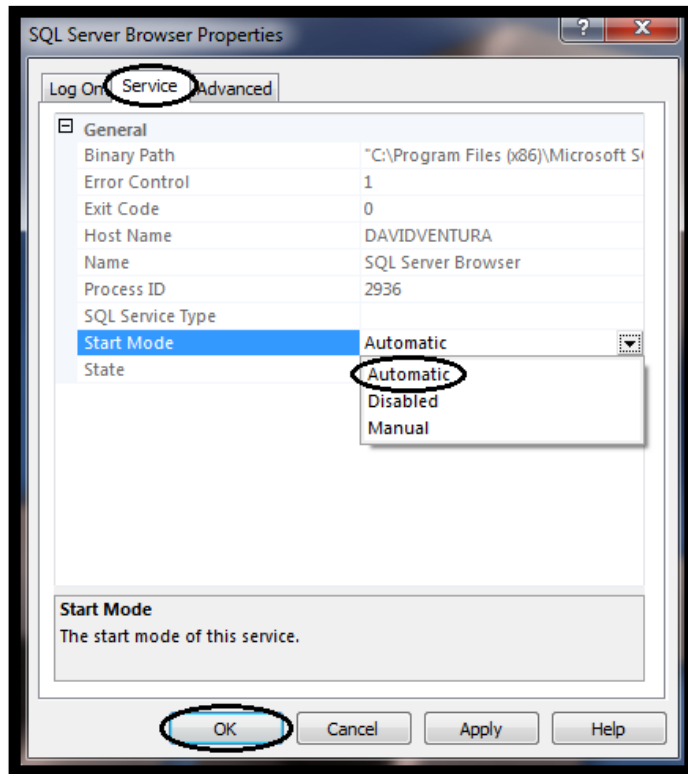


Figure 7-5

The configuration of SQL Server is now complete.

Manage Database

SELECTING YOUR SQL SERVER INSTANCE

After you have completed configuring Microsoft SQL Server, the next thing you must do is manage your database in the XERA® POS Manager application. From your desktop, navigate to **Start Button > All Programs > XERA POS > Application** and then click the *XERA Manager* menu item (See Figure 7-6).

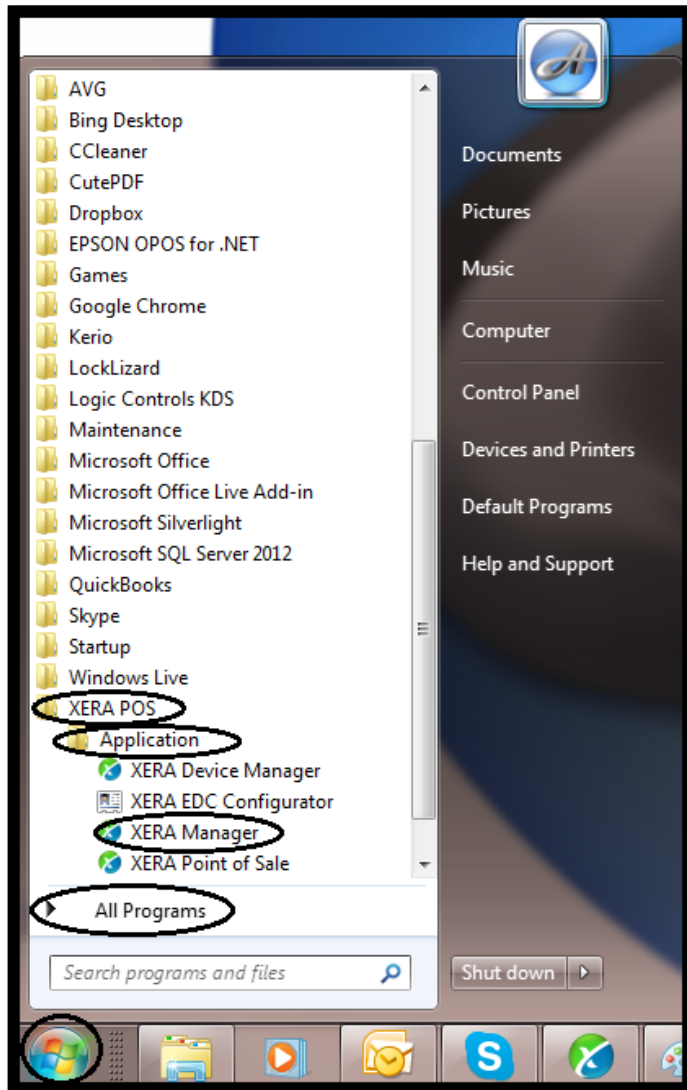


Figure 7-6

In the XERA® POS Manager application, click the unlabeled *File* Tab button in the upper left corner of the screen and then click the *Manage Database* option (See Figure 7-7).

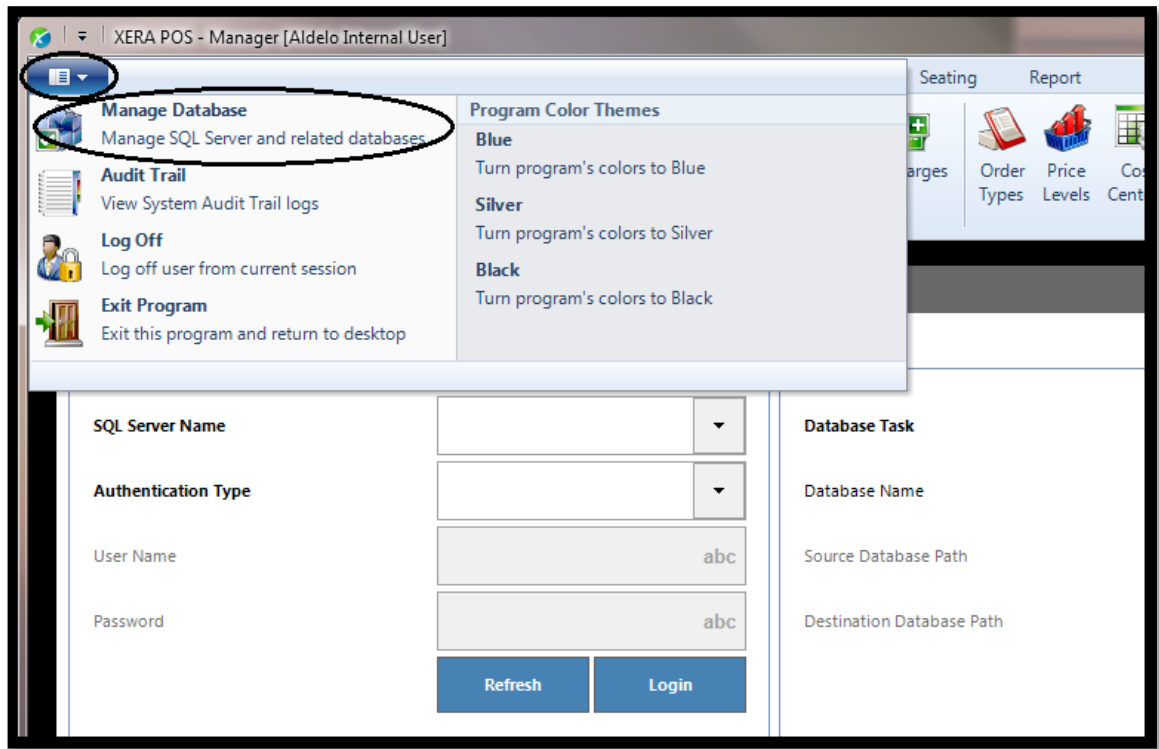


Figure 7-7

SQL Database Tab

The following features and options are found under the SQL Database Tab at the top of the Manage Database window.

SQL Server Name

Clicking the *Manage Database* option as described above causes the Manage Database window to appear. Click the *SQL Database* Tab and then click the *Refresh* button (See Figure 7-8).

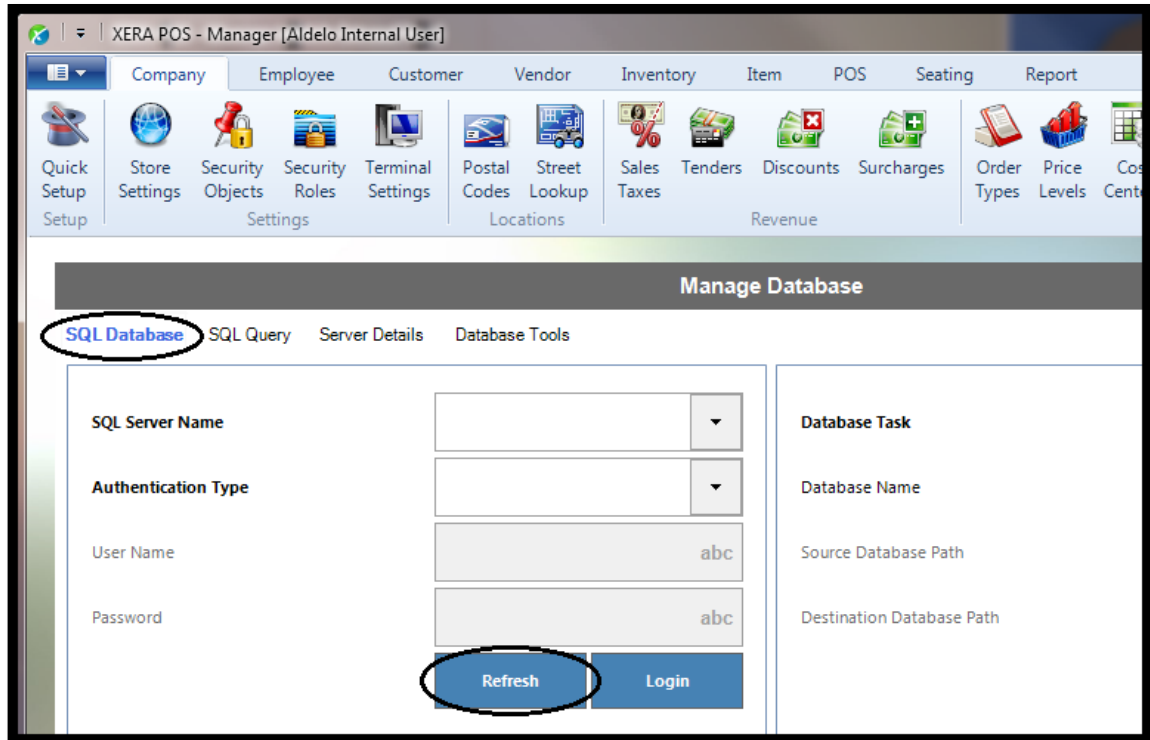


Figure 7-8

Next, click the *down arrow* button to the right to the SQL Server Name dropdown field. Select the correct SQL Server instance to use from the choices in the list by clicking on it. If you are not sure which one to select, contact your database administrator (See Figure 7-9).

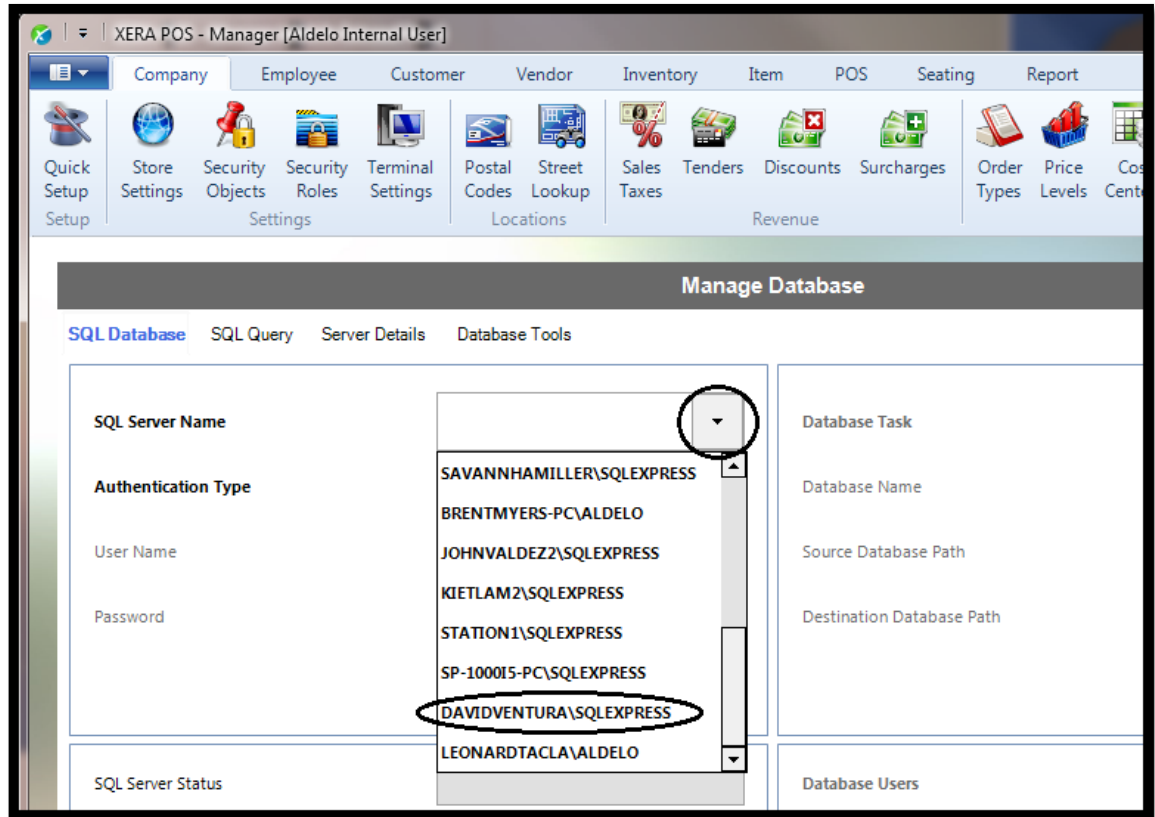


Figure 7-9

The next thing you must do is select your authentication type.

Authentication Type

Microsoft SQL Server allows two types of authentication: Windows Authentication and SQL Server Authentication.

Windows Authentication is best suited for single terminal deployments of XERA® POS, whereas SQL Server Authentication is best suited for multiple terminal deployments.

For our Checkers Restaurant example, we will use Windows authentication.

Windows Authentication

Click the *down arrow* button to the right of the Authentication Type dropdown field, select the *Windows Authentication* option, and then click the *Login* button (See Figure 7-10).

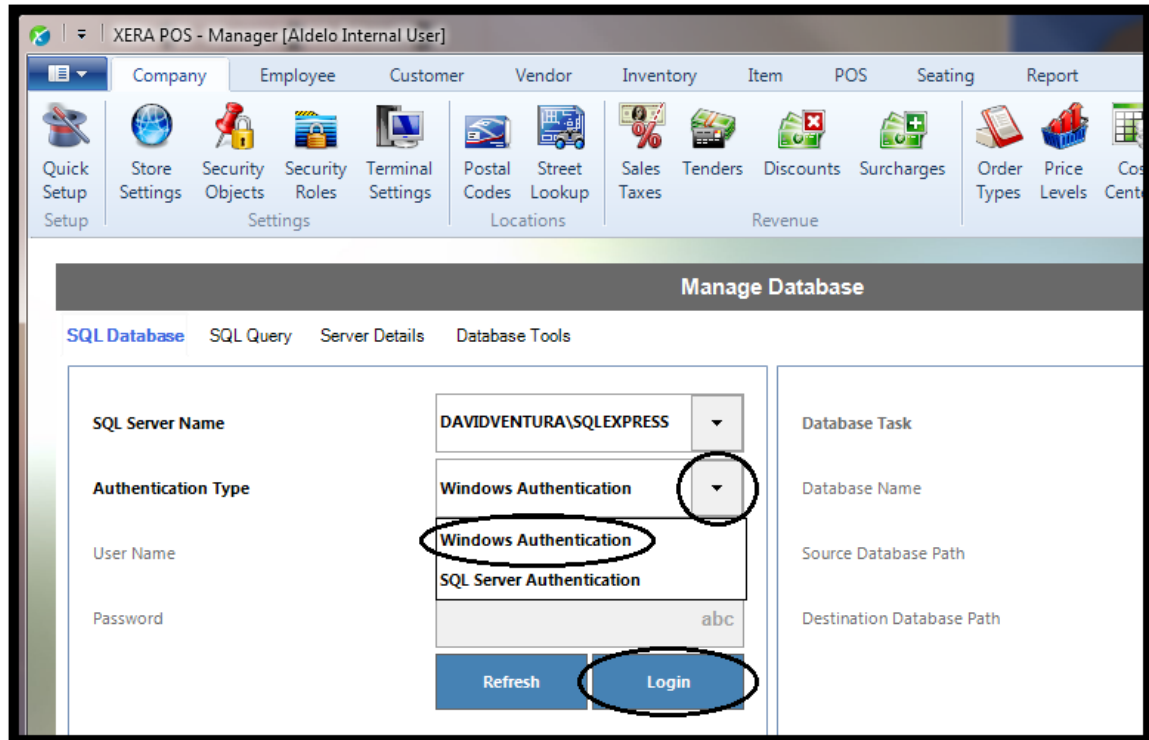


Figure 7-10

Database Settings

Click the *down arrow* button next to the Database Task dropdown list on the right side of the screen. The available database setting options are as follows:

1. **Set Primary Data Source** – Connects the selected data file to your instance of SQL Server. It becomes the primary data file for the program and allows records to be read from and written to the data file.
2. **Set Backup Data Source** – Connects the selected data file to your instance of SQL Server. It becomes the secondary data file for the program and allows records to be read from and written to the data file in a redundant fashion.
3. **Create Database** – This option allows the user to create a new database.
4. **Detach Database** – Disassociates the selected database from SQL Server.
5. **Attach Database** – Associates the selected database with SQL Server.
6. **Backup Database** – Creates a backup copy of the database as of the time the backup is performed.
7. **Restore Database** – Restores the database from the backup copy in situations where the database has become corrupted or lost.
8. **Shrink Database** – Performs a SQL shrink on the selected database.

9. **Set Recovery Mode to Simple** – When creating a backup copy of the database, an incremental backup is performed. This backup includes only the data that has changed since the last time the database was backed up.
10. **Set Recovery Mode to Full** – When creating a backup copy of the database, a full backup is performed. This backup includes all of the data in the database as of the time the Restore Database command is issued.
11. **Set Database Auto Close Off** – Maintains the connection to the database as long as XERA® POS is running, even if the last connection to the database is closed. Use of this feature can reduce access times to the database.

Use the scroll bar on the right side of the Database Task list box to reveal the hidden menu items (See Figure 7-11).

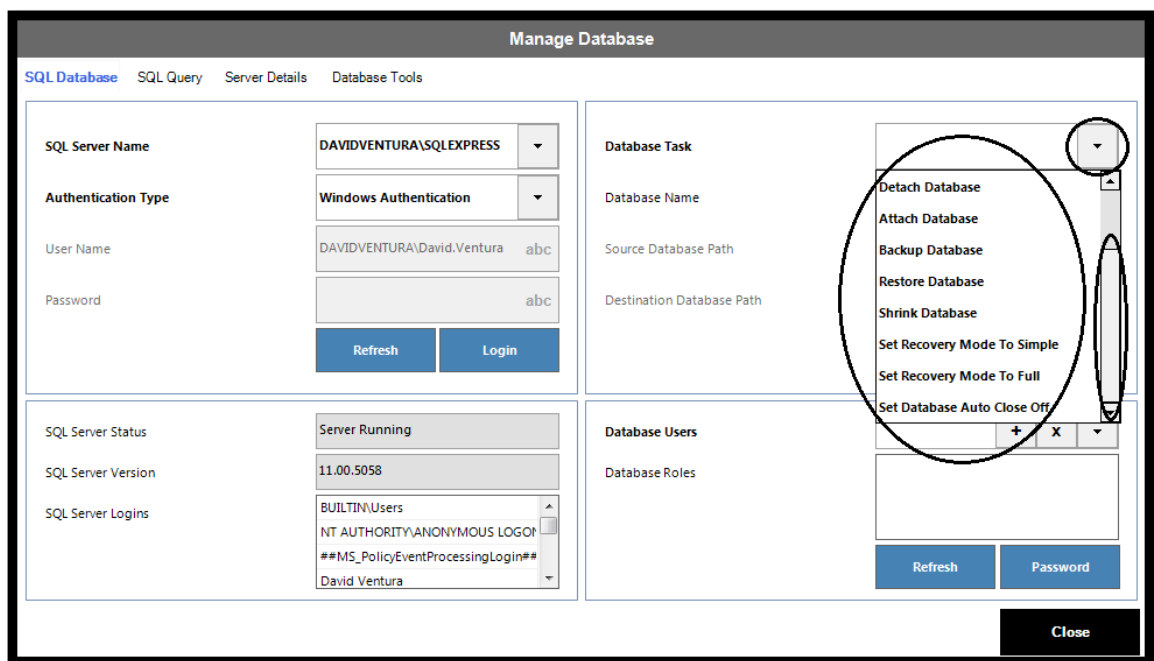



Figure 7-11

Create Database

Select the *Create Database* option in the Database Task dropdown field. Create a name for your database, type it into the Database Name field, and then choose a location for the database in the Destination Database Path field by clicking the *ellipsis* button  and navigating to your desired location on the local hard drive.

When finished, click the *Execute* button to create the database (See Figure 7-12).

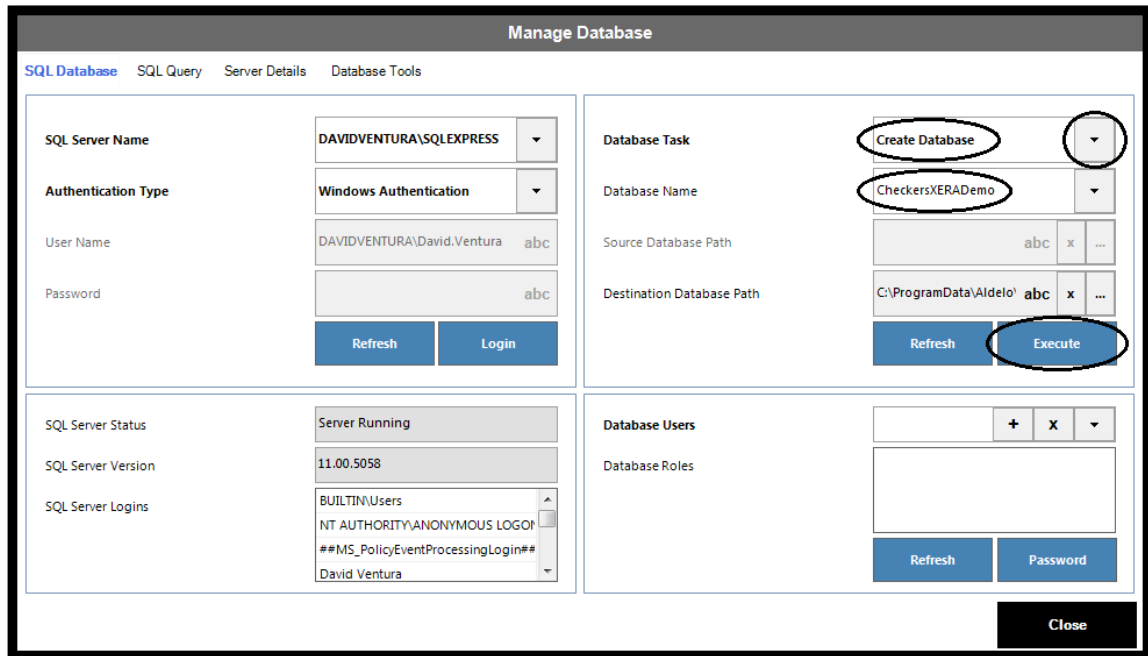


Figure 7-12

Set Primary Data Source

The next thing you must do is set your primary data source.

In the Database Task field, select the *Set Primary Data Source* option. Next, click the *down arrow* button next to the dropdown list to the right of the Database Name field and choose the database you created in the previous step.

Finally, click the *Execute* button. Your primary data source setup is now complete (See Figure 7-13).

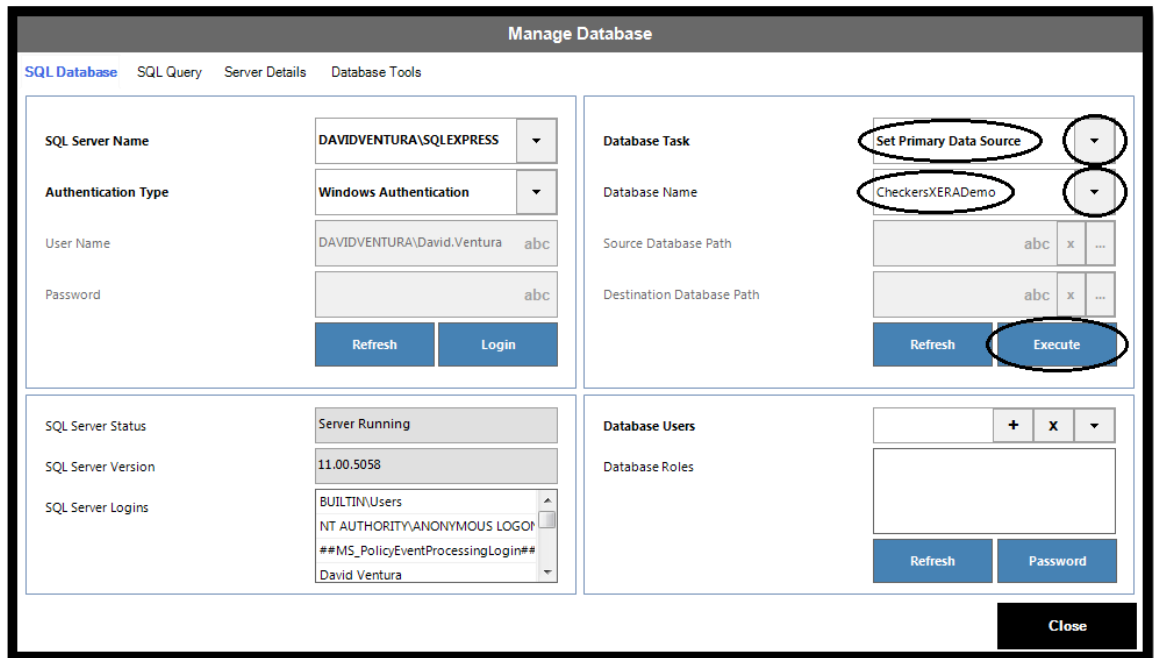


Figure 7-13

Chapter 8 — Company Setup

Quick Setup

The Quick Setup feature allows the user to setup XERA® POS by using default values for many of the settings. Then the user simply needs to add, delete, or adjust these settings as necessary to conform to his unique business situation.

To use the Quick Setup feature, open the XERA® POS Manager application and navigate to **Company Tab > Setup > Quick Setup**. Next, select the button that corresponds with the template you wish to setup (the Current Template or the Default Template) to display the template settings screen (See Figure 8-1).

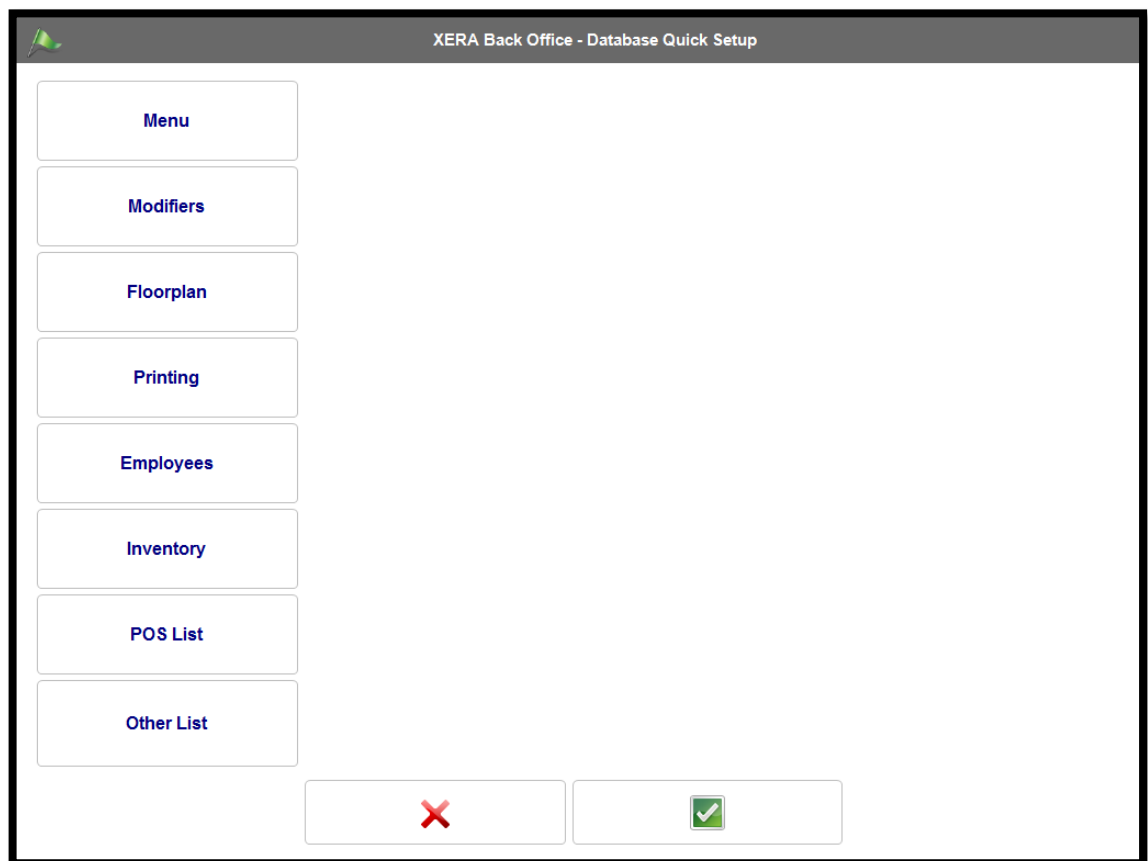


Figure 8-1

For our training purposes, we will not use the Quick Setup feature. For detailed information on its use, please see the chapter titled Company Setup in the XERA® POS Manager Manual.

Chapter 9 — Company Settings

In this chapter, we enter the data required for our Checkers Restaurant. Just as in a real business, we will not touch on every setting described in the XERA® POS Manager Manual.

To learn more about a specific company setting, please refer to the XERA® POS Manager Manual, as each of the settings listed in this chapter is described in detail in that manual. If desired, you may also follow along in the manager manual to see what settings should be different for your own specific application.

Store Settings

Open the XERA® POS Manager application, click on the *Company* Tab, and then in the Settings group, select *Store Settings* (See Figure 9-1).

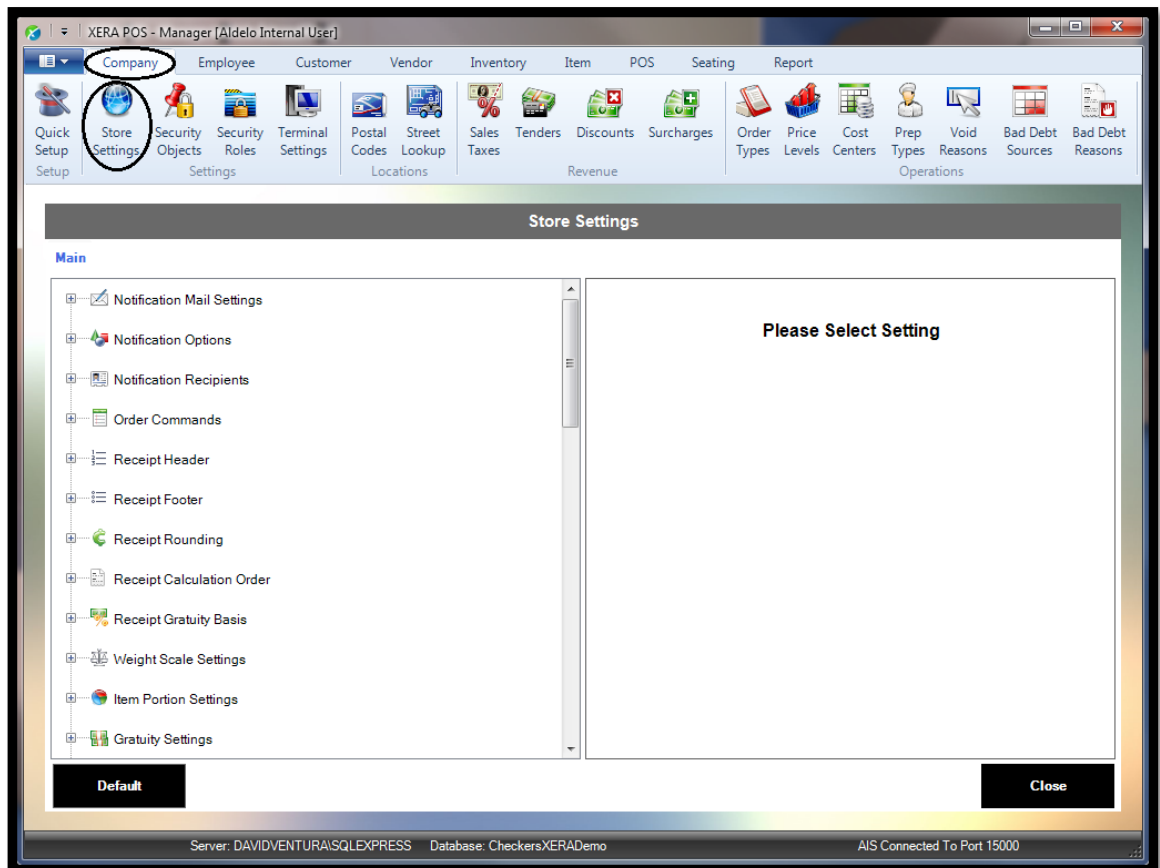


Figure 9-1

For our training purposes, we will use the default values for much of this information. Examine these screens thoroughly to determine which settings must be changed for your own application.

NOTIFICATION FEATURES

The Notification features of XERA® POS consist of the Notification Mail Settings, the Notification Options, and the Notification Recipients. These settings allow the user to setup the automatic sending of e-mail messages to up to three members of your staff regarding any changes to the status of your XERA® POS installation.

For our training purposes, we will leave the Notification features settings at their default values.

ORDER COMMANDS

Order Commands are short messages pre-programmed into XERA® POS. When a customer order is entered into the system, one or more of these order commands may be added to the selected menu items. These order commands are directed to the kitchen staff and print on the kitchen chit with the customer order.

In Store Settings, double-click on *Order Commands* to expand the order commands option and reveal Order Commands 1 – 31. In the left column, click on *Order Command 1* and then enter “As Appetizer” in the large textbox on the right side of the screen (See Figure 9-2).

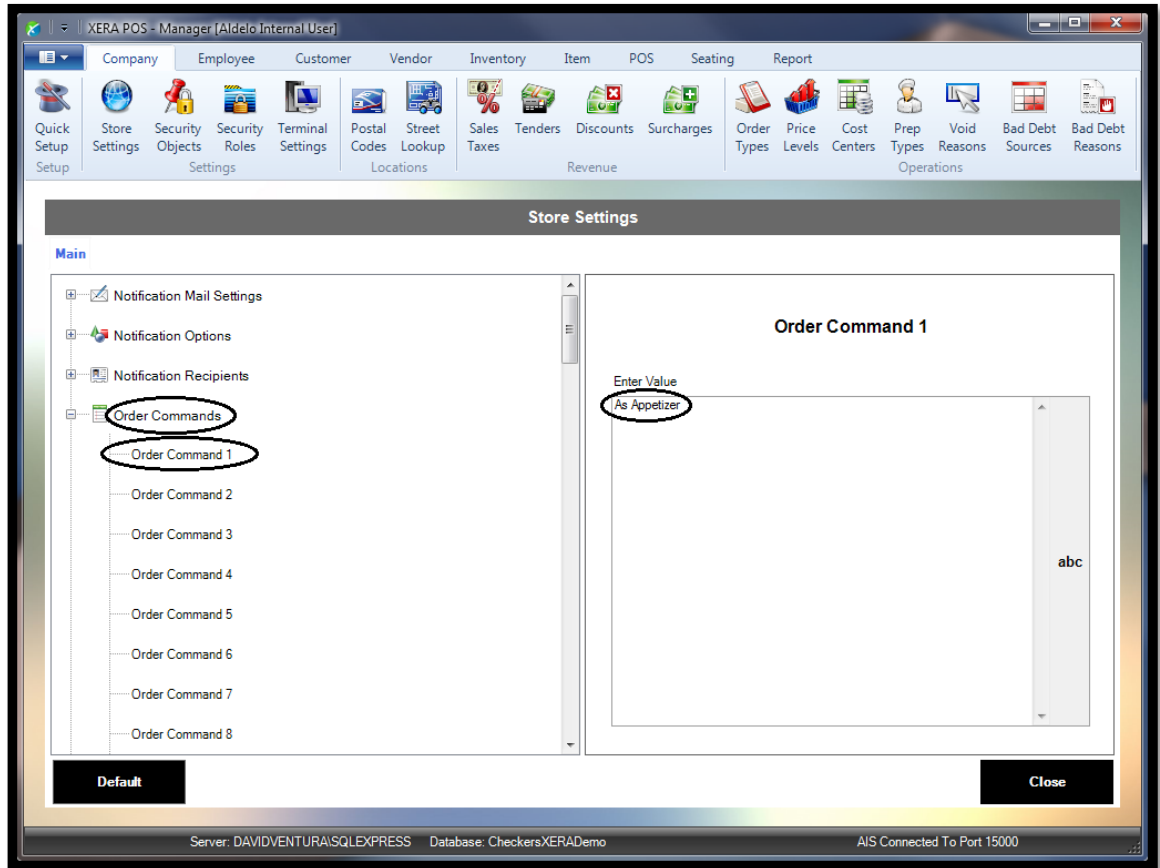


Figure 9-2

Now enter the rest of these order commands as listed in the following table:

Order Command #	Value
1	As Appetizer
2	As Entrée
3	Sauce on Side
4	No Onions
5	For Takeout

(Please note: Changes to the Store Settings in the XERA® POS Manager application are saved automatically when the changes are made and do not require the user to perform a manual save operation.)

RECEIPT HEADER

The Receipt Header is defined as the top portion of the customer receipt. XERA® POS allows up to ten lines of information to be added to the receipt header. This information prints at the top of each customer receipt generated by the software.

In Store Settings, double-click on *Receipt Header* to expand the receipt header option and reveal Receipt Header Lines 1 – 10. In the left column, click on *Receipt Header Line 1* and then enter “CHECKERS RESTAURANT” in the large textbox on the right side of the screen (See Figure 9-3).

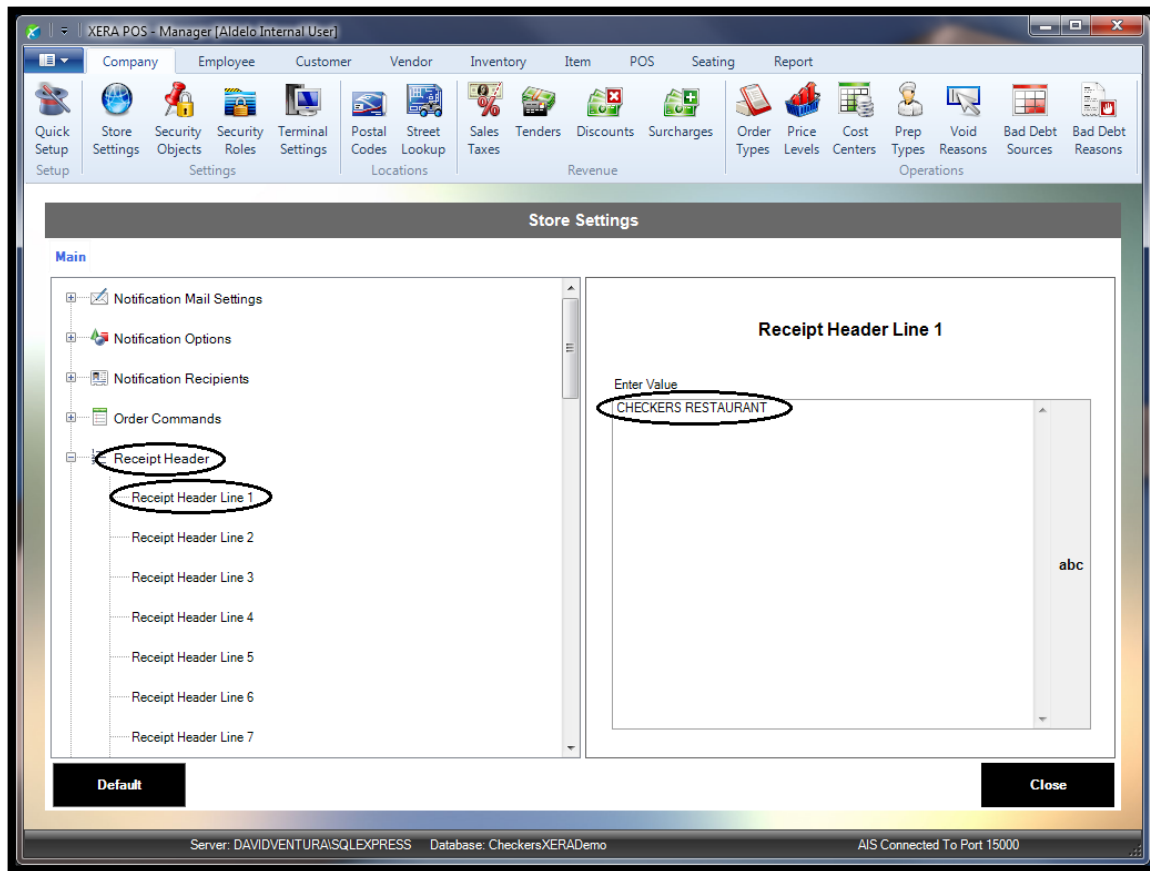


Figure 9-3

Now enter the rest of these receipt header lines as listed in the following table:

Receipt Header Line #	Value
1	CHECKERS RESTAURANT
2	America's Favorite
3	Bar and Grill.

RECEIPT FOOTER

The Receipt Footer is defined as the bottom portion of the customer receipt. XERA® POS allows up to ten lines of information to be added to the receipt footer. This information prints at the bottom of each customer receipt generated by the software.

In Store Settings, double-click on *Receipt Footer* to expand the receipt footer option and reveal Receipt Footer Lines 1 – 10. In the left column, click on *Receipt Footer Line 1* and then enter “THANK YOU” in the large textbox on the right side of the screen (See Figure 9-4).

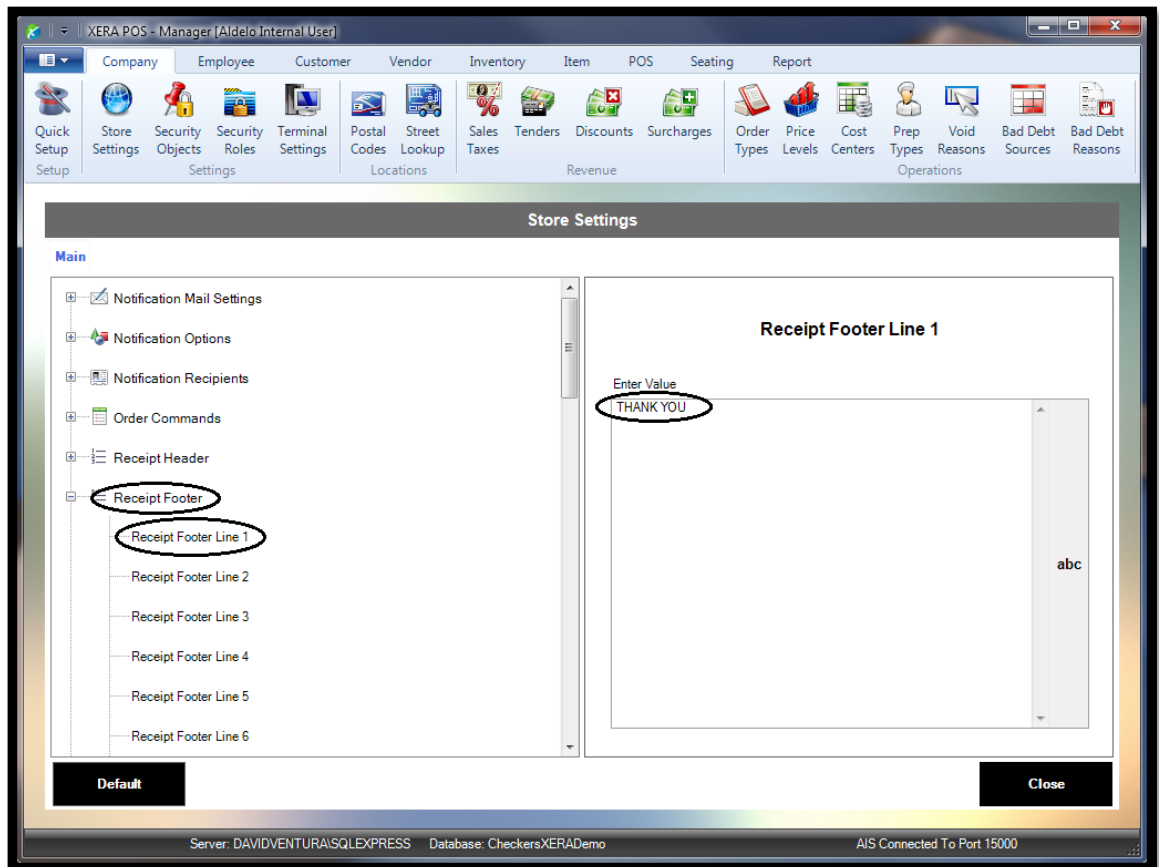


Figure 9-4

Now enter the rest of these receipt footer lines as listed in the following table:

Receipt Footer Line #	Value
1	THANK YOU
2	for Dining with Us.
3	Please Come Again.

RECEIPT ROUNDING

The Receipt Rounding feature allows the manager to setup rules that the system follows when rounding of the total dollar amount of the receipt is desired. Rounding may be required by law in some jurisdictions, may be illegal in some jurisdictions, or it may just be desired to simplify the settling of guest checks and the issuing of change for cash transactions. Always check local laws before using the Receipt Rounding feature.

For our training purposes, we will leave the Receipt Rounding feature settings at their default values.

RECEIPT CALCULATION ORDER

Whenever discounts and surcharges are applied to a guest check, the total amount of the guest check depends on the order in which the discounts and surcharges are applied. XERA® POS allows the user to setup the order in which discounts and surcharges are applied to the guest check.

In Store Settings, double-click on *Receipt Calculation Order* to expand the receipt calculation order option and reveal Calculation Orders 1 – 4. In the left column, click on the *Calculation Order 1* option and then select *Line Discounts* from the dropdown list on the right side of the screen (See Figure 9-5).

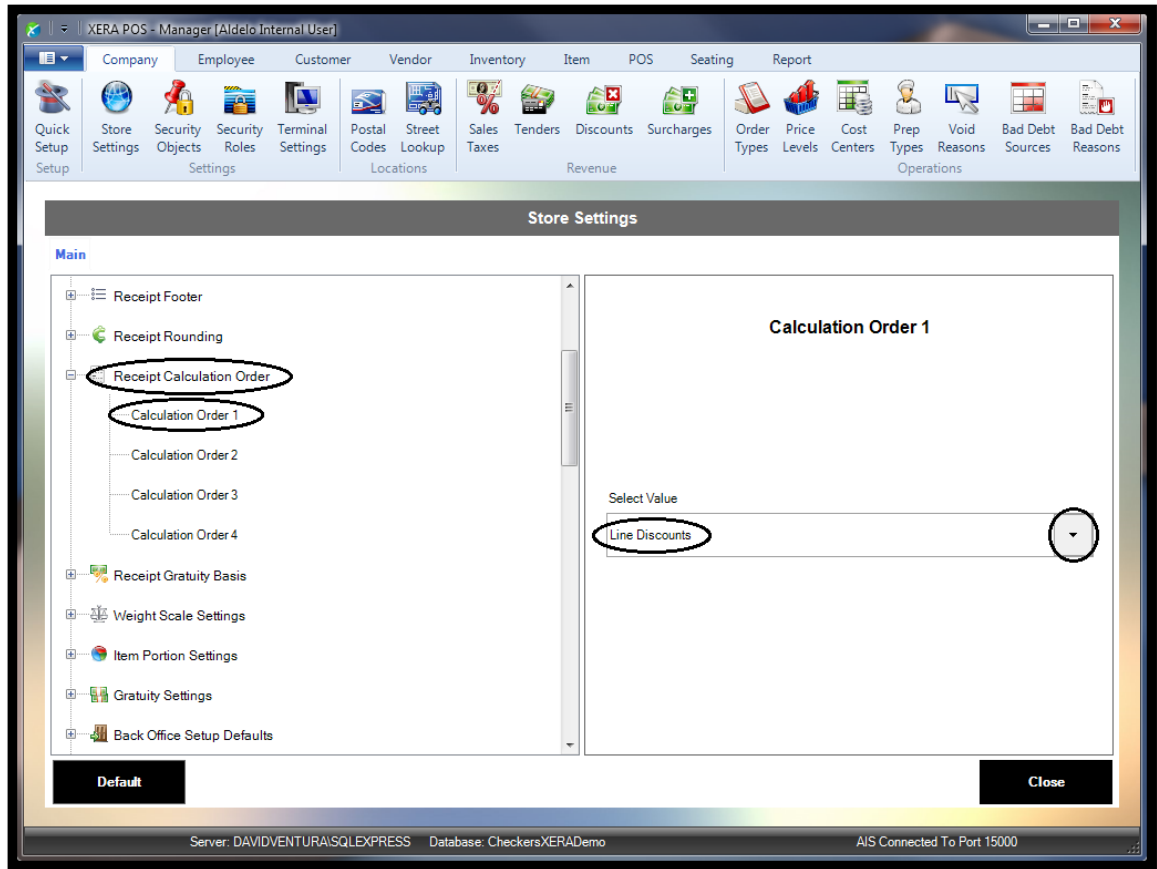


Figure 9-5

Now enter the rest of the receipt calculation order information as listed in the following table:

Receipt Calculation Order	Value
Calculation Order 1	Line Discounts
Calculation Order 2	Order Discount
Calculation Order 3	Order Surcharge
Calculation Order 4	Delivery Surcharge

RECEIPT GRATUITY BASIS

The Receipt Gratuity Basis is defined as the rules by which automatic gratuities are applied to a guest check. XERA® POS allows the user to setup automatic gratuities to be applied to discounts, surcharges, delivery charges, and exclusive taxes, if desired.

In Store Settings, double-click on *Receipt Gratuity Basis* to expand the receipt gratuity option. This reveals the four receipt gratuity option settings. In the left column, click on *Receipt Gratuity on Discounts* and then select *No* from the dropdown list on the right side of the screen (See Figure 9-6).

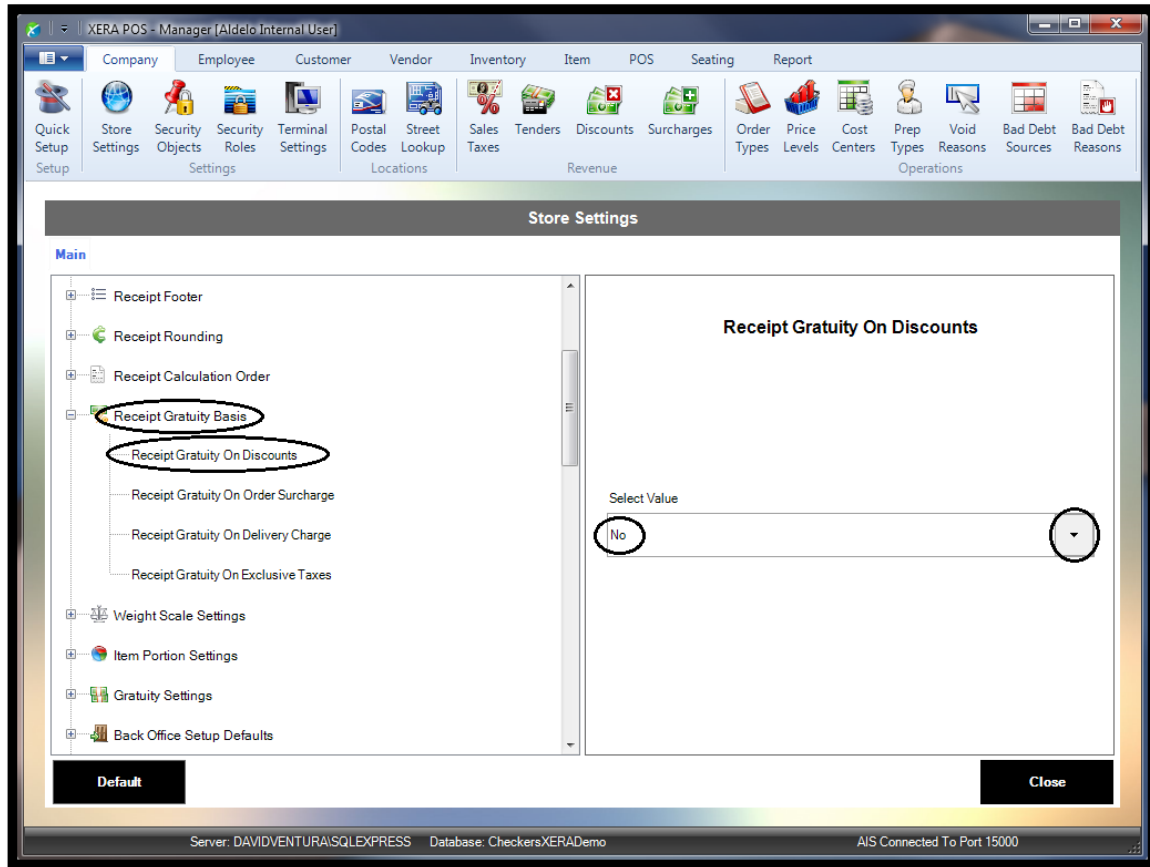


Figure 9-6

Now enter the rest of these receipt gratuity basis settings as listed in the following table:

Receipt Gratuity Option	Value
Receipt Gratuity on Discounts	No
Receipt Gratuity on Order Surcharge	Yes
Receipt Gratuity on Delivery Charge	No
Receipt Gratuity on Exclusive Taxes	No

WEIGHT SCALE SETTINGS

When you sell items by weight and use a scale to weigh these items, the Weight Scale Settings must be setup in XERA® POS so that the weight of the items may be displayed properly and the correct sale prices calculated.

Under Weight Scale Unit of Measure Name, enter the suffix for the unit of measure your scale uses.

Under Weight Quantity Decimals, enter the number of digits to the right of the decimal point that your scale is capable of displaying.

Under Weight Output Maximum Length, enter the maximum number length (including the decimal point) that the scale is capable of displaying. For example, if the scale is calibrated in kilograms and can display a maximum of 14.99 kg, then enter “5” for this setting (one for each digit plus one for the decimal point).

In Store Settings, double-click on *Weight Scale Settings* to expand the weight scale settings options. In the left column, click on *Weight Scale Unit of Measure Name* and then enter “oz.” in the large textbox on the right side of the screen (See Figure 9-7).

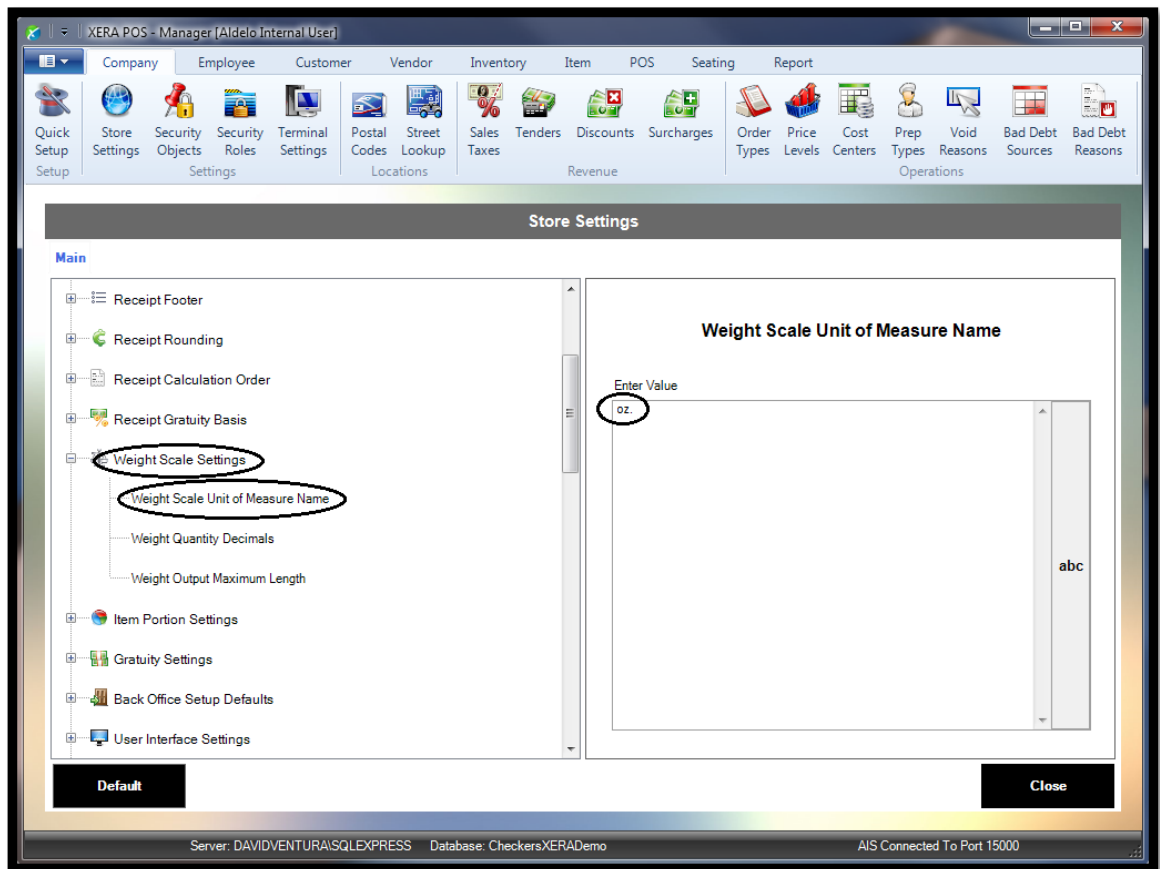


Figure 9-7

Now enter the rest of these weight scale settings as listed in the following table:

Weight Scale Settings	Value
Weight Scale Unit of Measure Name	oz.
Weight Quantity Decimals	2
Weight Output Maximum Length	6

ITEM PORTION SETTINGS

If your business makes certain menu items with different ingredients on different portions of the item (for example, pizzas), the Item Portion Settings feature allows you to dictate how the item is priced. The item may be priced as if the entire item was comprised of the most expensive portion, as if the entire item was comprised of the least expensive portion, or the price of the entire item may be prorated as the sum of the prices of the various portions. Menu items may be identified in the system as of the item portion type and proportional pricing may be restricted to only those items so identified, or proportional pricing may be extended to all menu items.

In Store Settings, double-click on *Item Portion Settings* to expand the item portion settings option. In the left column, click on *Portioned Items Pricing Type* and then select *Normal Pricing* from the dropdown list on the right side of the screen (See Figure 9-8).

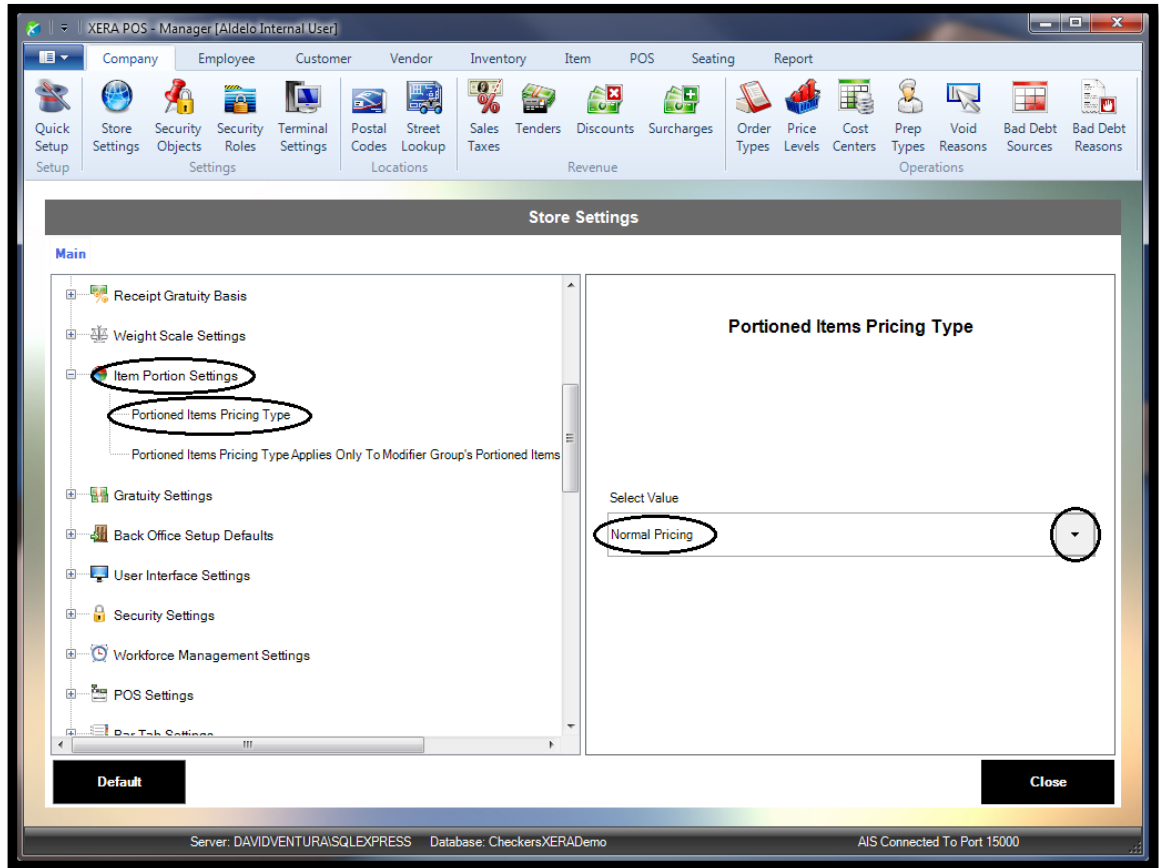


Figure 9-8

Now enter the rest of these item portion settings as listed in the following table:

Item Portion Settings	Value
Portioned Items Pricing Type	Normal Pricing
Portioned Items Pricing Type Applies Only to Modifier Group's Portioned Items Threshold Group	Yes

GRATUITY SETTINGS

If your business charges an automatic gratuity to guest parties that meet or exceed a certain minimum guest count, then that minimum guest count number is setup under gratuity settings.

In addition, up to five suggested gratuity amounts may be displayed on the guest check by entering the desired suggested gratuity percentages.

In Store Settings, double-click on *Gratuity Settings* to expand the gratuity settings option. In the left column, click on *Auto Gratuity Minimum Guest Count* and then enter “8” in the large textbox on the right side of the screen (See Figure 9-9).

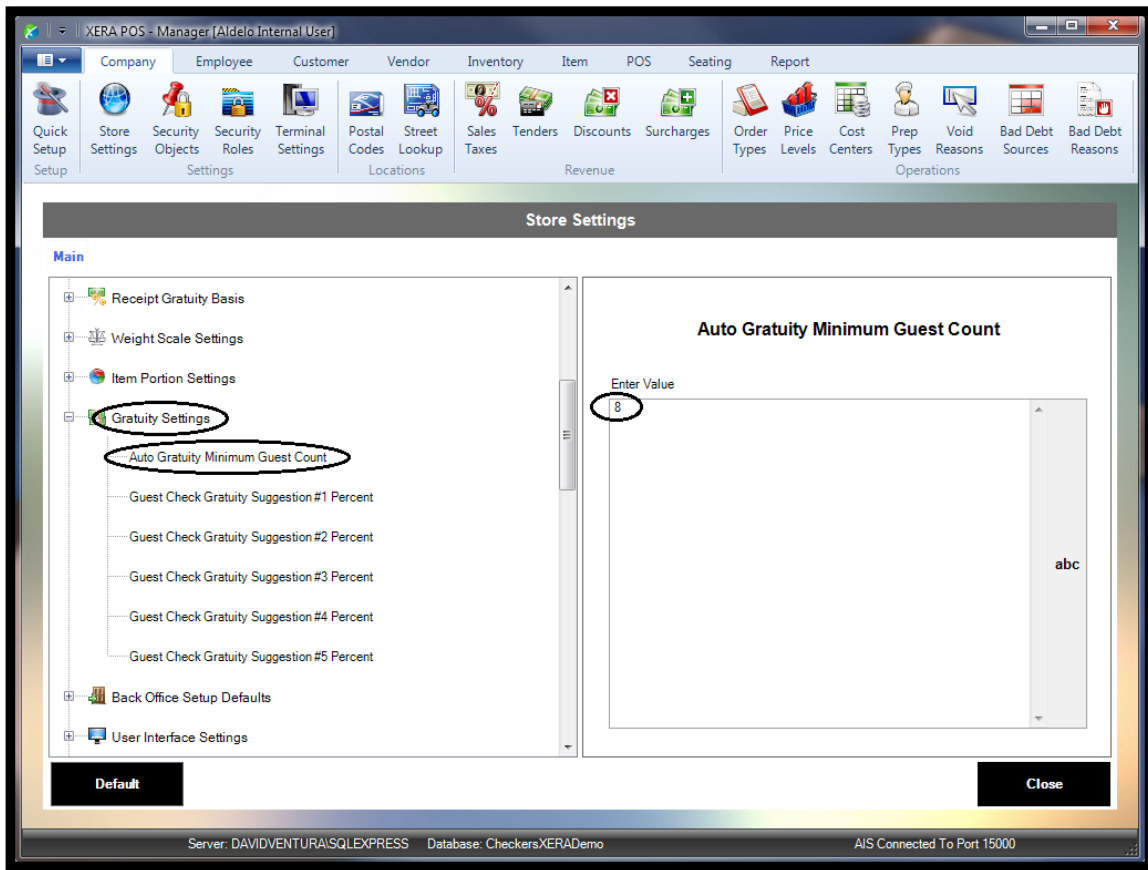


Figure 9-9

Now enter the rest of these gratuity settings as listed in the following table:

Gratuity Settings	Value
Auto Gratuity Minimum Guest Count	8
Guest Check Gratuity Suggestion #1 Percent	15
Guest Check Gratuity Suggestion #2 Percent	20
Guest Check Gratuity Suggestion #3 Percent	25

BACK OFFICE SETUP DEFAULTS

The Back Office Setup Defaults feature allows the manager to setup how XERA® POS reacts when new item prices or new menu item modifiers are added.

The Auto Apply Tax on New Price option allows the automatic application of sales taxes 1-5 to a menu item whenever a new price is entered for the item.

The Auto Enable Price Override Option in Modifier Group feature allows you to automatically trigger the price override to ensure that a modifier group has its own pricing scheme whenever a modifier is added to the modifier group.

The Auto Enabled Price Override Amount in Modifier Group option is tied to the feature described above. No entry is required if *No* is selected for the Auto Enable Price Override Option in Modifier Group feature. If *Yes* is selected, then enter the monetary amount to place into the modifier associated with the respective modifier group.

In Store Settings, double-click on *Back Office Setup Defaults* to expand the back office default settings option. In the left column, click on *Auto Apply Tax 1 on New Price* and then Select *Yes* from the dropdown list on the right side of the screen (See Figure 9-10).

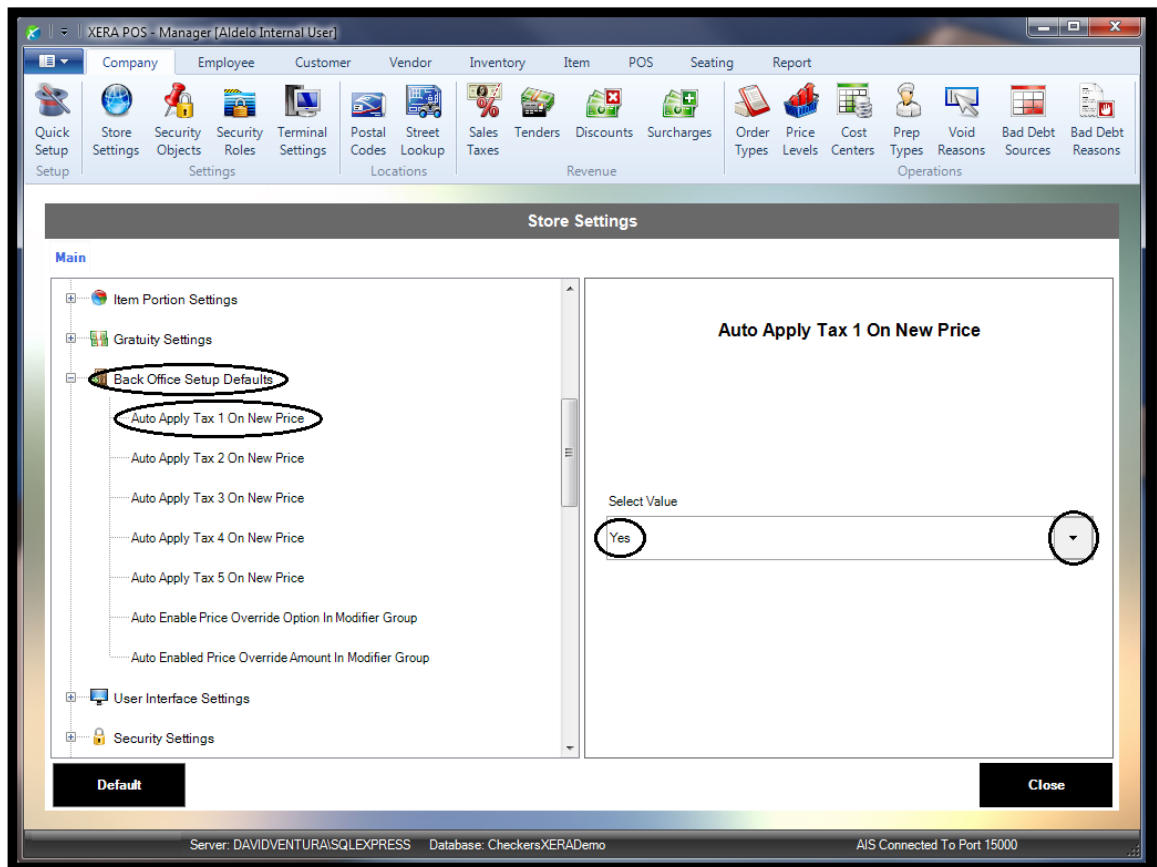


Figure 9-10

Now enter the rest of these back office setup default settings as listed in the following table:

Back Office Setup Default Settings	Value
Auto Apply Tax 1 on New Price	Yes
Auto Apply Tax 2 on New Price	No
Auto Apply Tax 3 on New Price	No
Auto Apply Tax 4 on New Price	No
Auto Apply Tax 5 on New Price	No
Auto Enable Price Override Option in Modifier Group	No
Auto Enable Price Override Amount in Modifier Group	-

USER INTERFACE SETTINGS

The User Interface Settings feature allows the manager to setup how XERA® POS interacts with the user. The screen resolution for the display of the XERA® POS Manager application and the number of seconds to display dialog boxes may be set.

In Store Settings, double-click on *User Interface Settings* to expand the user interface settings option. In the left column, click on *Message Dialog Countdown Seconds* and then enter “25” in the large textbox on the right side of the screen (See Figure 9-11).

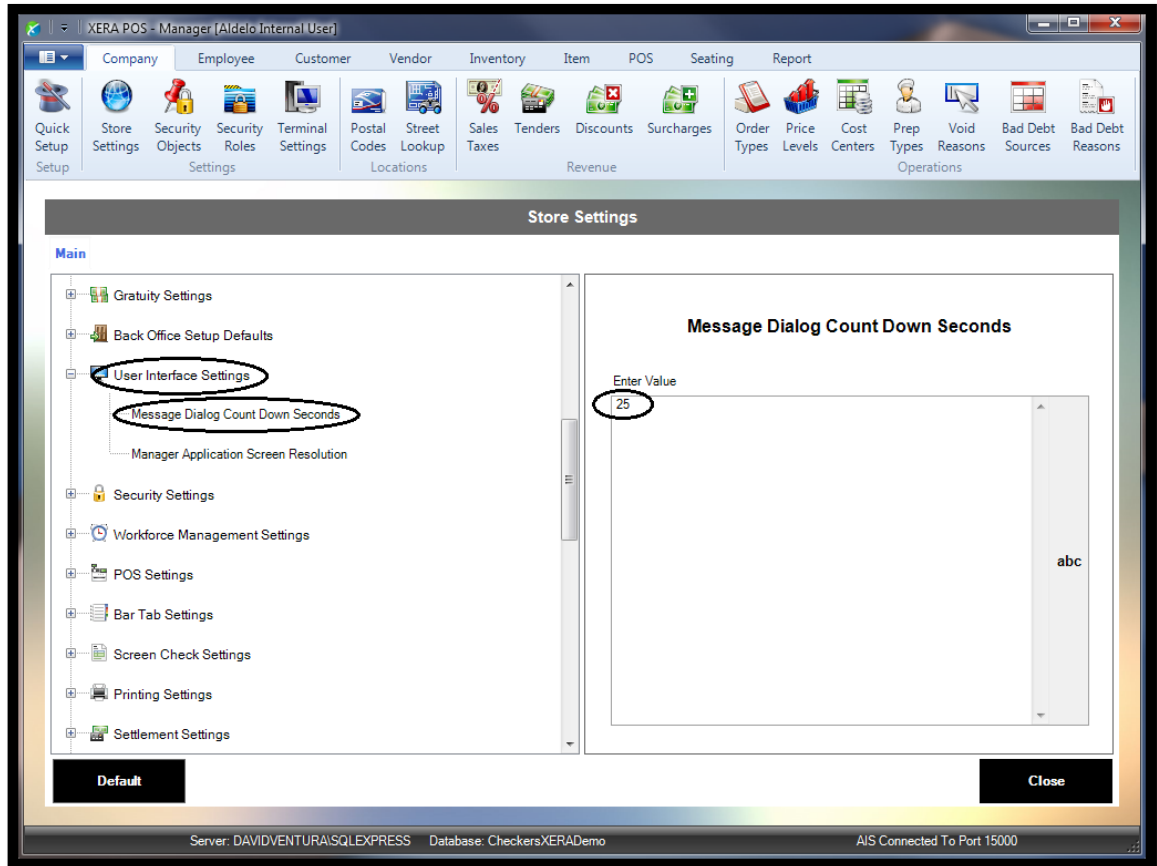


Figure 9-11

Now enter the rest of these user interface settings as listed in the following table:

User Interface Settings	Value
Message Count Down Dialog Seconds	25
Manager Application Screen Resolution	Default Screen

SECURITY SETTINGS

The Security Settings feature allows the manager to setup up to twelve challenge questions. Three of these questions must be answered correctly to recover a lost or stolen password when logging into XERA® POS.

In Store Settings, double-click on *Security Settings* to expand the security settings option. In the left column, click on *Password Reset Challenge Question 1* and enter “What is the name of your first school?” in the large textbox on the right side of the screen (See Figure 9-12).

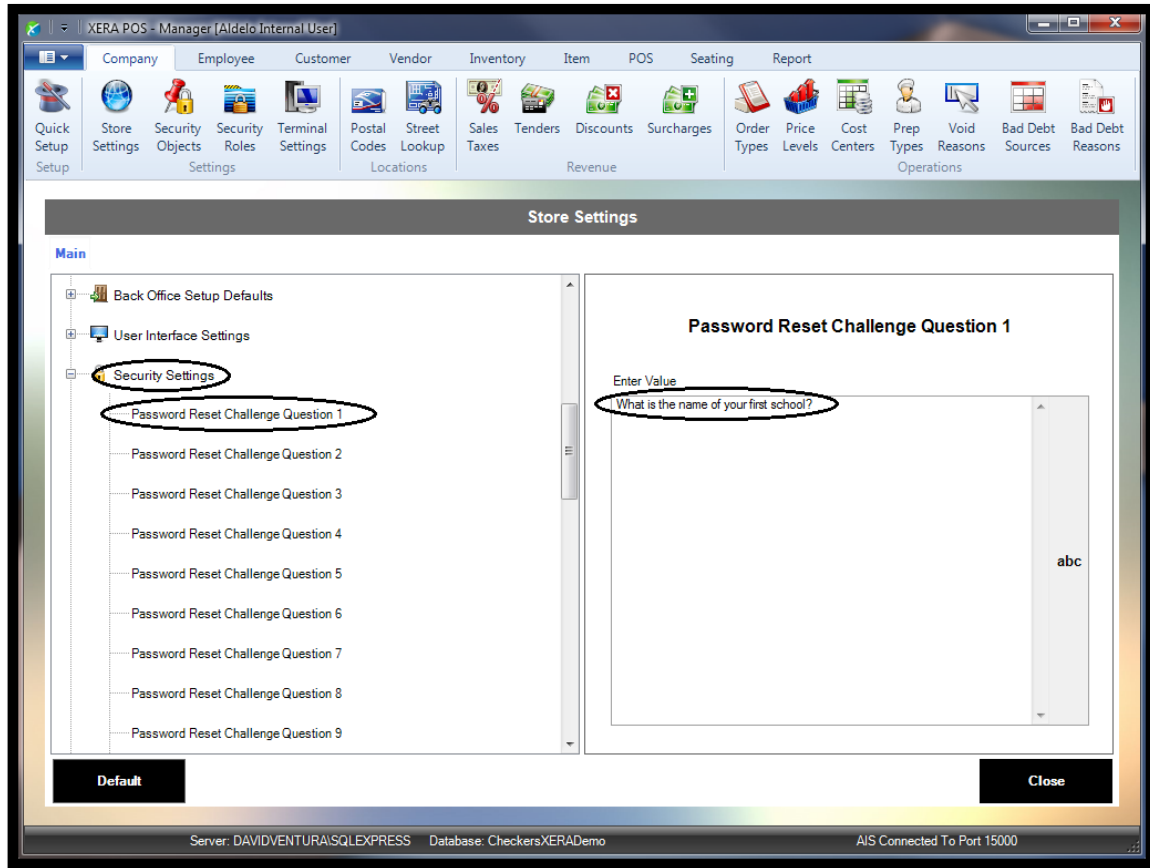


Figure 9-12

Now enter the rest of these challenge questions as listed in the following table:

Security Settings	Value
Password Reset Challenge Question 1	What is the name of your first school?
Password Reset Challenge Question 2	What is the name of your first pet?

WORKFORCE MANAGEMENT SETTINGS

The Workforce Management Settings feature allows the manager to setup how XERA® POS handles the aspects of your business that have to do with the management of your employees.

These settings are covered in detail in a separate manual, the XERA® POS Workforce Management Module. Please refer to this manual to determine the values for each of these settings for your own installation of XERA® POS.

In Store Settings, double-click on *Workforce Management Settings* to expand the workforce management settings options. In the left column, click on *Enable Workforce Management* and then select *Yes* from the dropdown list on the right side of the screen (See Figure 9-13).

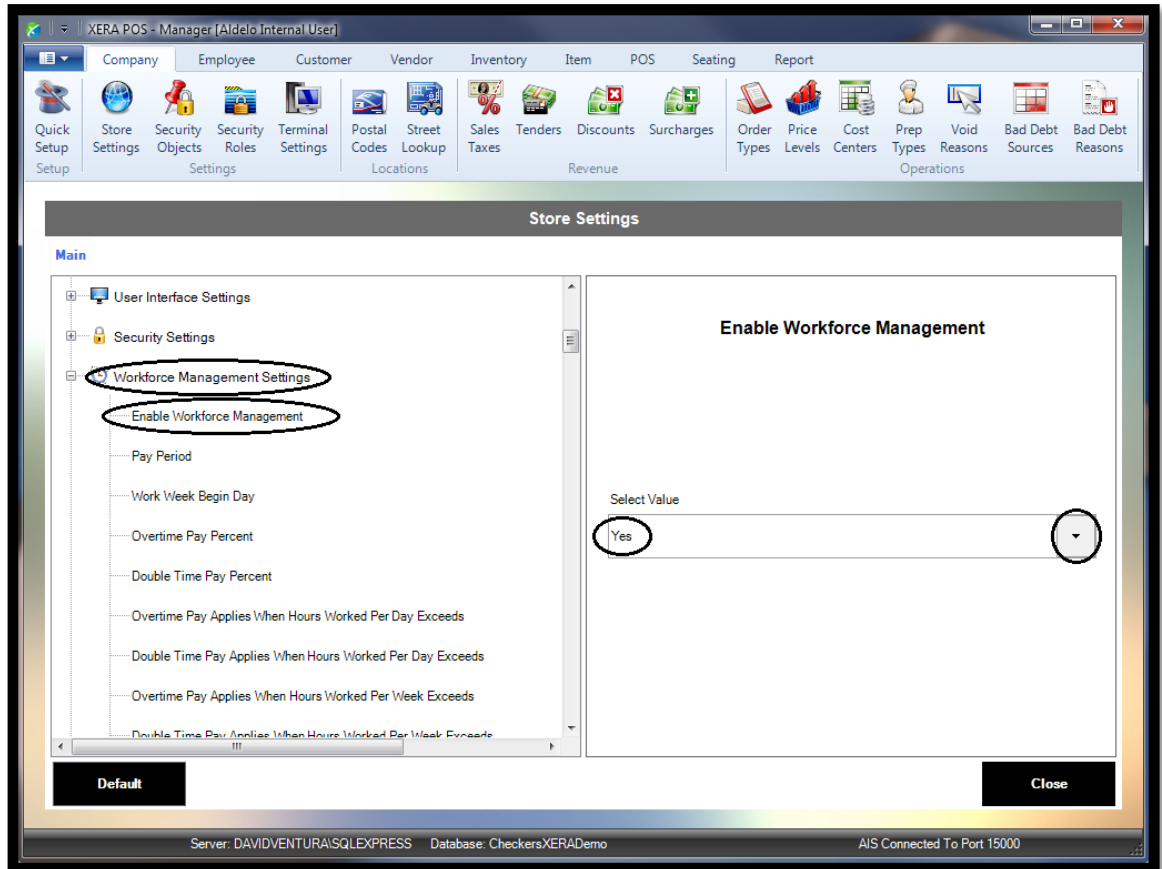


Figure 9-13

For our training purposes, we will enable workforce management but only change one of the settings.

Upon enabling workforce management, scroll down through the settings until you find *Break is Required Per '?' Consecutive Hours Worked*. Click on this setting with your mouse and enter “6” in the large textbox on the right side of the screen (See Figure 9-14).

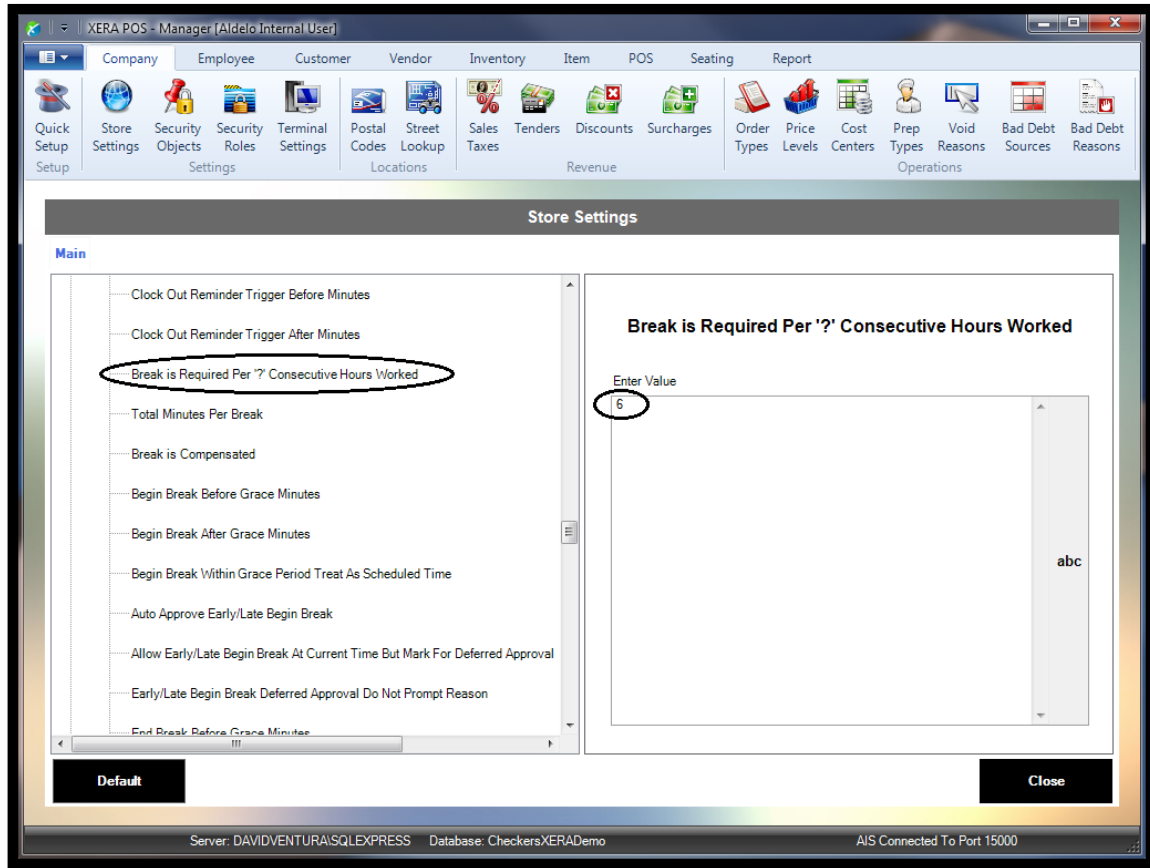


Figure 9-14

For our training purposes, the default value of “4” for this setting is insufficient to allow the scheduling of our employees’ work breaks during an eight-hour work shift. Labor schedules are covered later in this manual.

We will leave the rest of the workforce management settings at their default values.

POS SETTINGS

The POS Settings feature allows the setup of several miscellaneous settings in XERA® POS.

When enabled, the Void Line Requires Reason and Void Order Requires Reason settings require the user to enter the reason for the void. Requiring this information helps to prevent employee theft.

The Auto Login Access Code Digits setting allows the manager to determine the number of digits required for an employee access code. When a positive integer value is entered for this setting, the software automatically attempts to login the employee after the last digit is entered, relieving the user from having to click the *Enter* button, and thereby saving a keystroke. Please note that if the employee's access code consists of fewer digits than the maximum allowable number of digits, then he still must click the *Enter* button when finished entering his access code to let XERA® POS know that he has entered the entire access code. Please also note that this feature works most efficiently when all access codes contain the same number of digits.

The Table Tent Begin Number and Table Tent End Number settings allow the manager to enter the range of numbers that are used when the Table Tent feature is enabled. This prevents the user from entering a number that is outside the range of available table tent numbers.

The Table Tent Button Rows Count and the Table Tent Button Columns Count settings allow the manager to design the Table Tent Number Selection screen button layout in his preferred configuration. Please note that the value entered for the Table Tent Button Rows Count multiplied by the value entered for the Table Tent Button Columns Count must be greater than or equal to the total number of table tents in use, or it is impossible to display all of your table tent numbers.

The remaining three POS settings are self-explanatory.

In Store Settings, double-click on *POS Settings* to expand the user POS settings option. In the left column, click on *Void Line Requires Reason* and then select *Yes* from the dropdown list on the right side of the screen (See Figure 9-15).

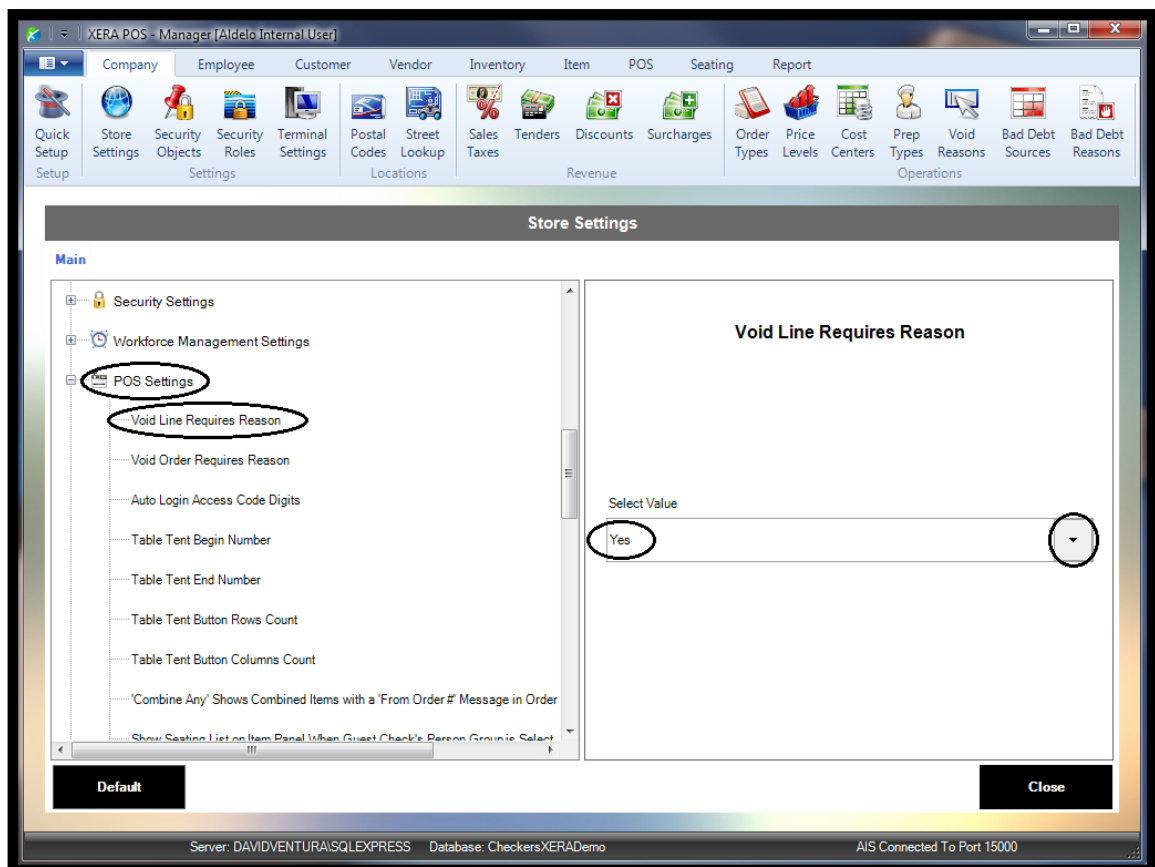


Figure 9-15

Now enter the rest of these POS settings as listed in the following table:

POS Settings	Value
Void Line Requires Reason	Yes
Void Order Requires Reason	Yes
Auto Login Access Code Digits	3
Table Tent Begin Number	1
Table Tent End Number	50
Table Tent Button Rows Count	4
Table Tent Button Columns Count	13
Combine Any' Shows Combined Items with a 'From Order #' Message in Order	Yes
Show Seating List on Item Panel when Guest Check's Person Group is Selected	Yes
Auto Accept Inbound Order Transfers	No

BAR TAB SETTINGS

The Bar Tab Settings feature pertains to pre-authorizations of your customers' bar tabs.

When a bar tab is pre-authorized, the customer may charge drinks up to the pre-authorized limit. Once this limit is reached, the customer must submit payment for the drinks already received before additional drinks may be charged. This cycle repeats each time the pre-authorized limit is reached again.

For further information on the Bar Tab Settings feature, please see the XERA® POS Manager Manual.

For our training purposes, we will leave the Bar Tab Settings at their default values.

SCREEN CHECK SETTINGS

The Screen Check Settings feature affects only the guest check as it displays on the computer screen to the user. Screen Check Settings do not affect the printed copy of the guest check that is given to the customer.

When the Show Unit Price Breakdown for Complex Item on the Screen Check setting is enabled, if a menu item has a modifier attached to it that costs extra, XERA® POS displays the cost of the selected modifier on the screen with the listing of the modifier under the menu item. For example, if a Caesar Salad may be ordered with sliced chicken breast on it for an extra \$2.00, then selecting this option displays the attached modifier beneath the Caesar Salad on the screen check as "Sliced Chicken Breast [\$2.00]." This additional charge is also reflected in the menu item price as it displays on the screen.

For example, if the Caesar Salad sells for \$12.95, the addition of the chicken breast modifier causes the screen check to display “\$14.95” as the price of the Caesar Salad with chicken breast added.

In Store Settings, double-click on *Screen Check Settings* to expand the user Screen Check Settings option. In the left column, click on *Show Unit Price Breakdown for Complex Item on the Screen Check* and then select *Yes* from the dropdown list on the right side of the screen (See Figure 9-16).

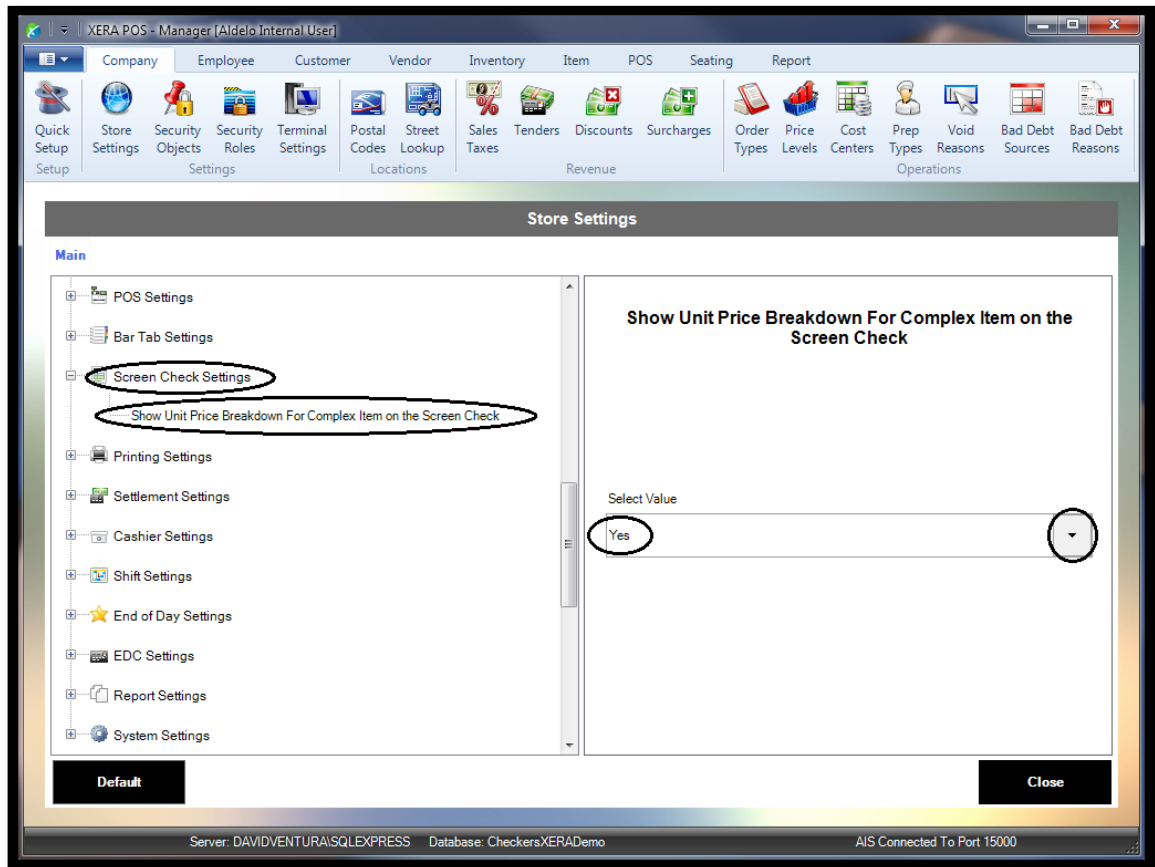


Figure 9-16

PRINTING SETTINGS

The Printing Settings feature affects only the guest checks and kitchen/bar chits as they print to your receipt printers.

For our training purposes, we will leave the printing settings at their default values.

SETTLEMENT SETTINGS

The Settlement Settings feature includes only one setting: Manually Close Check when EDC Payments Exist.

Select *Yes* for this setting if you wish to allow the user to hold open a guest check that has EDC payments applied to it so that a gratuity may be added after the customer adds a gratuity to the guest check and signs the receipt. The transaction is held in its pre-authorized state until the user makes any necessary adjustments and then manually post-authorizes it.

Select *No* to automatically close the guest check as soon as the customer's credit card payment has been authorized.

For our training purposes, we will leave this setting at its default value of *No*.

CASHIER SETTINGS

The Cashier Settings feature allows the setup of the settings that have to do with your cashiers in XERA® POS.

In Store Settings, double-click on *Cashier Settings* to expand the user Cashier Settings option. In the left column, click on *Enable Server Banking* and then select *Yes* from the dropdown list on the right side of the screen (See Figure 9-17).

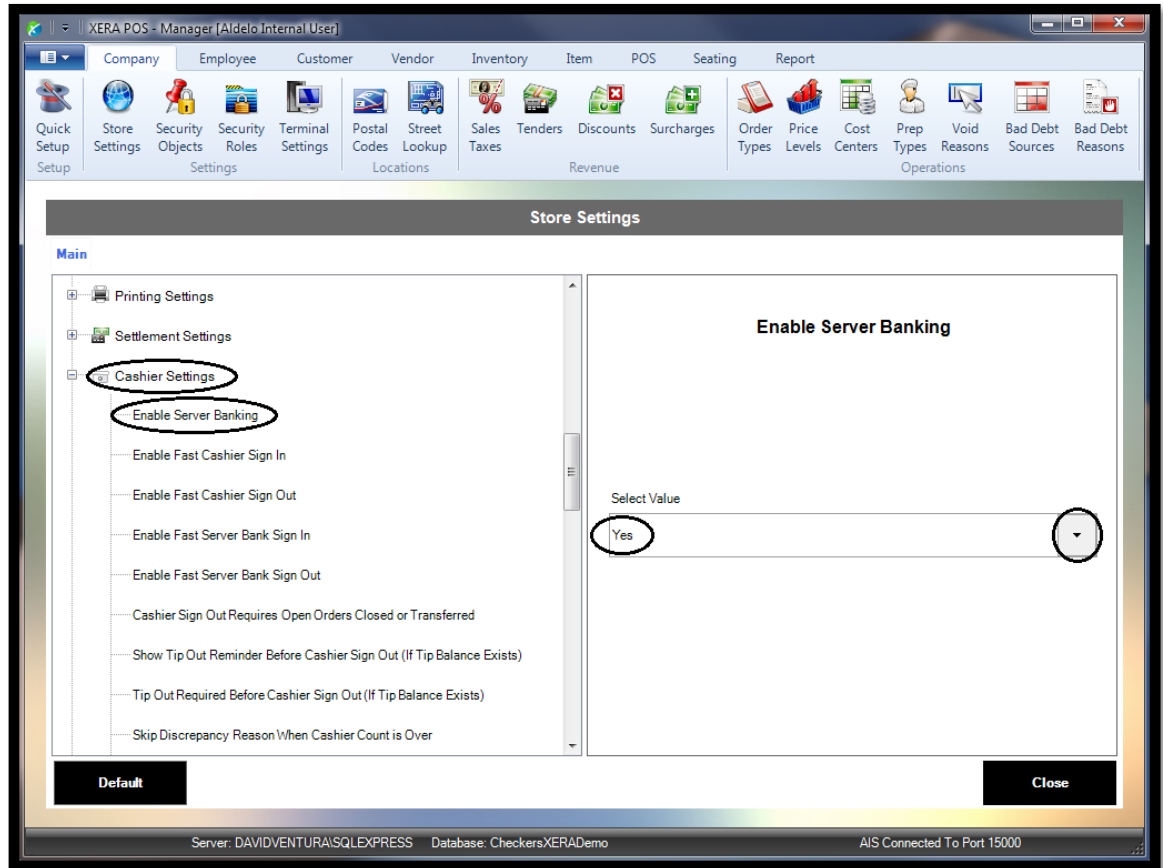


Figure 9-17

Now enter the rest of these cashier settings as listed in the following table:

Cashier Settings	Value
Enable Server Banking	Yes
Enable Fast Cashier Sign In	No
Enable Fast Cashier Sign Out	No
Enable Fast Server Bank Sign In	No
Enable Fast Server Bank Sign Out	No
Cashier Sign Out Requires Open Orders Closed or Transferred	Yes
Show Tip Out Reminder Before Cashier Sign Out (If Tip Balance Exists)	No
Tip Out Required Before Cashier Sign Out (If Tip Balance Exists)	No
Skip Discrepancy Reason When Cashier Count is Over	No
Skip Discrepancy Reason When Cashier Count is Short	No
Automatically Reconcile When Cashier Count is Over	No
Automatically Reconcile When Cashier Count is Short	No
Defer Cashier Auto Reconcile Until End of Day	No
Default Cash Drawer Begin Amount	-
Default Server Bank Begin Amount	-
Show Activity Cash Withdraw Guide Upon Cash Drawer Sign Out	Yes
Show Activity Cash Withdraw Guide Upon Server Bank Sign Out	Yes
Show Cashier Report with Payment Activities	No
Show Cashier Report with Category Sales	No
Show Cashier Report with Sub Category Sales	No
Show Cashier Report with Void Summary	No
No Sale Requires Reason	No
Show EDC Tip Entry Reminder before Cashier Sign Out	No
Show EDC Tip Entry Reminder before Server Bank Sign Out	No

SHIFT SETTINGS

The Shift Settings feature allows the setup of the settings that have to do with your employee work shifts.

In Store Settings, double-click on *Shift Settings* to expand the user Shift Settings option. In the left column, click on *Business Day Start Time* and then enter “6:00 AM” in the large textbox on the right side of the screen (See Figure 9-18).

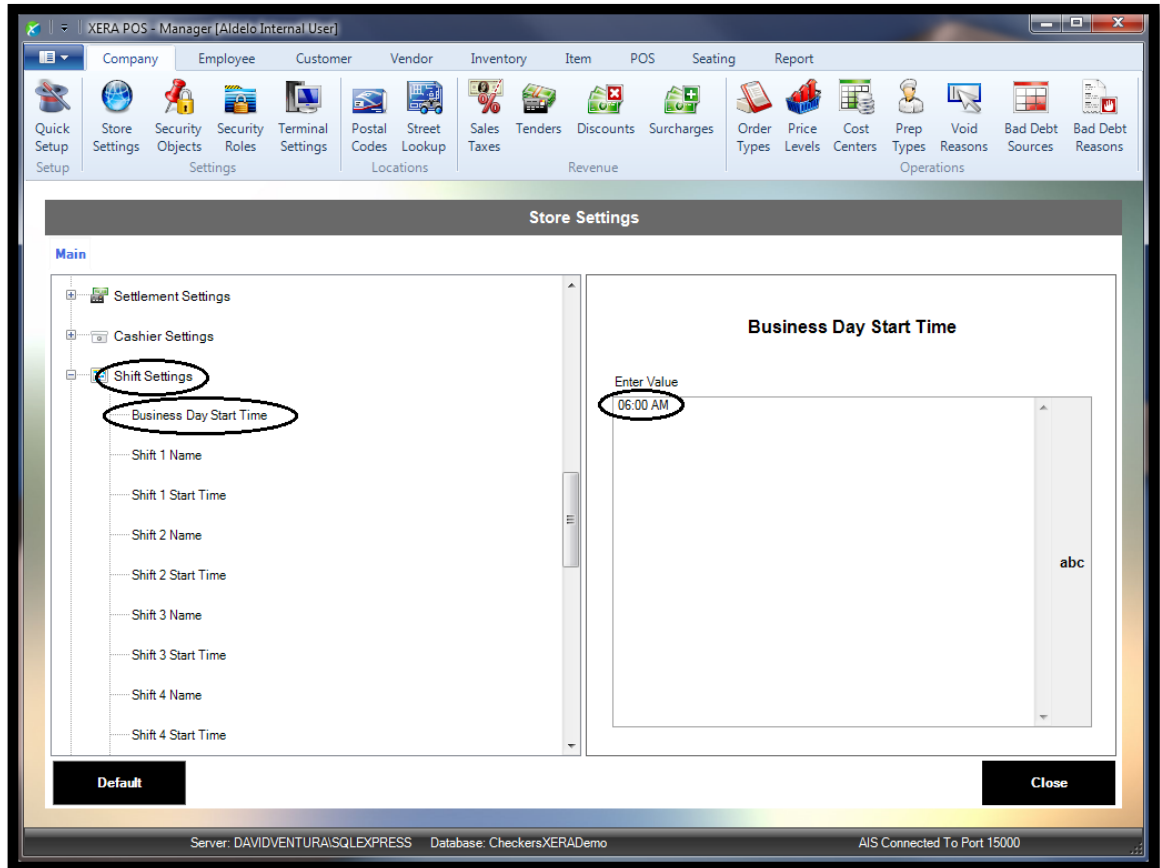


Figure 9-18

Now enter the rest of these shift settings as listed in the following table:

Shift Settings	Value
Business Day Start Time	6:00 AM
Shift 1 Name	Morning Shift
Shift 1 Start Time	6:00 AM
Shift 2 Name	Afternoon Shift
Shift 2 Start Time	12:00 PM
Shift 3 Name	Evening Shift
Shift 3 Start Time	4:00 PM
Shift 4 Name	-
Shift 4 Start Time	-
Shift 5 Name	-
Shift 5 Start Time	-
Shift 6 Name	-
Shift 6 Start Time	-

END OF DAY SETTINGS

The End of Day Settings feature allows the setup of the settings that have to do with the performance of your end of day procedure in XERA® POS.

For our training purposes, we will leave the end of day settings at their default values.

EDC SETTINGS

The EDC Settings feature allows the manager to enter the settings necessary to integrate XERA® POS with Aldelo® EDC (Electronic Data Capture). Aldelo® EDC enables merchants to achieve simplified, reliable, and secure payment acceptance.

For our training purposes, we will leave the EDC settings at their default values.

REPORT SETTINGS

Report Settings in the XERA® POS Manager application allow the setup of up to five series of reports consisting of up to five individual reports each that are generated automatically at the selected time of day and at the selected frequency.

There is also a setting (the Extended Open Order Threshold Minutes setting) that controls the maximum number of minutes that an order may remain open before it is designated as an

extended open order. An open order is an order that has not been settled. An extended open order is defined as an order that remains open longer than the number of minutes specified in this setting.

This information is used for reporting purposes. For example, if the extended open order threshold minutes is set to “90,” then any order that remains open longer than 90 minutes appears on the Extended Open Order List report.

For our training purposes, we will leave the report settings at their default values.

SYSTEM SETTINGS

System Settings in the XERA® POS Manager application include the data caching expiration setting and the caller ID integration UDP listening port setting.

For our training purposes, we will leave the system settings at their default values.

Security Objects

A Security Object is used to identify a security principle. There are two kinds of security objects in XERA® POS: System Level Security Objects and User Level Security Objects. System Level Security Objects are predefined programmatic objects that are created by Aldelo, LP, and are not accessible to the user. User Level Security Objects may be created by the user and added to the list of existing security objects displayed under the List Tab.

For our training purposes, we will simply use the default security objects. We will not create any new security objects.

Security Roles

Security Roles are created in the system and then these Security Roles are assigned to your employees. Security Objects are also assigned to the Security Roles. When a Security Role has been assigned to a specific employee, that employee may access all of the Security Objects that have been assigned to that Security Role.

MAIN TAB


Click on the *Main* Tab of the Security Roles screen, click the *New* button, and then enter the following security roles. Please note that for each security role entered here, we will leave the Security Role Alternate Name field blank and the *Hide* checkbox unchecked.

After entry of each security role, click the *New* button again to save the current security role and begin entry of a new one. Upon completion of the entry of the last security role, click the *Save* and *Done* buttons to save the last security role entered and exit the Security Roles screen.

Security Role Name	POS Start Screen
Bar Staff	New Order
Bus Staff	-
Cashier	Recall Order
Delivery Driver	-
Hostess	Hostess
Kitchen Staff	-
Manager	New Order
Owner	-
Wait Staff	New Order

ACCESS CONTROL TAB

Security objects are assigned to your security roles under the Access Control Tab.

Under the List Tab, double-click on *Bus Staff* to display it under the Main Tab. Next, click on the *Access Control* Tab. Select “All” from the Security Objects List dropdown field and then scroll down in the Security Objects List until you find the *POS – Time Card* section and click on it to select it. Now click the *right arrow* button  in the middle of the screen to add the *POS – Time Card* security object to the Assigned Security Objects of the *Bus Staff* security role.

When you click the *right arrow* button, all of the security objects listed under the POS – Time Card group move to the Assigned Security Objects list of the Bus Staff security roles on the right side of the screen (See Figure 9-19).

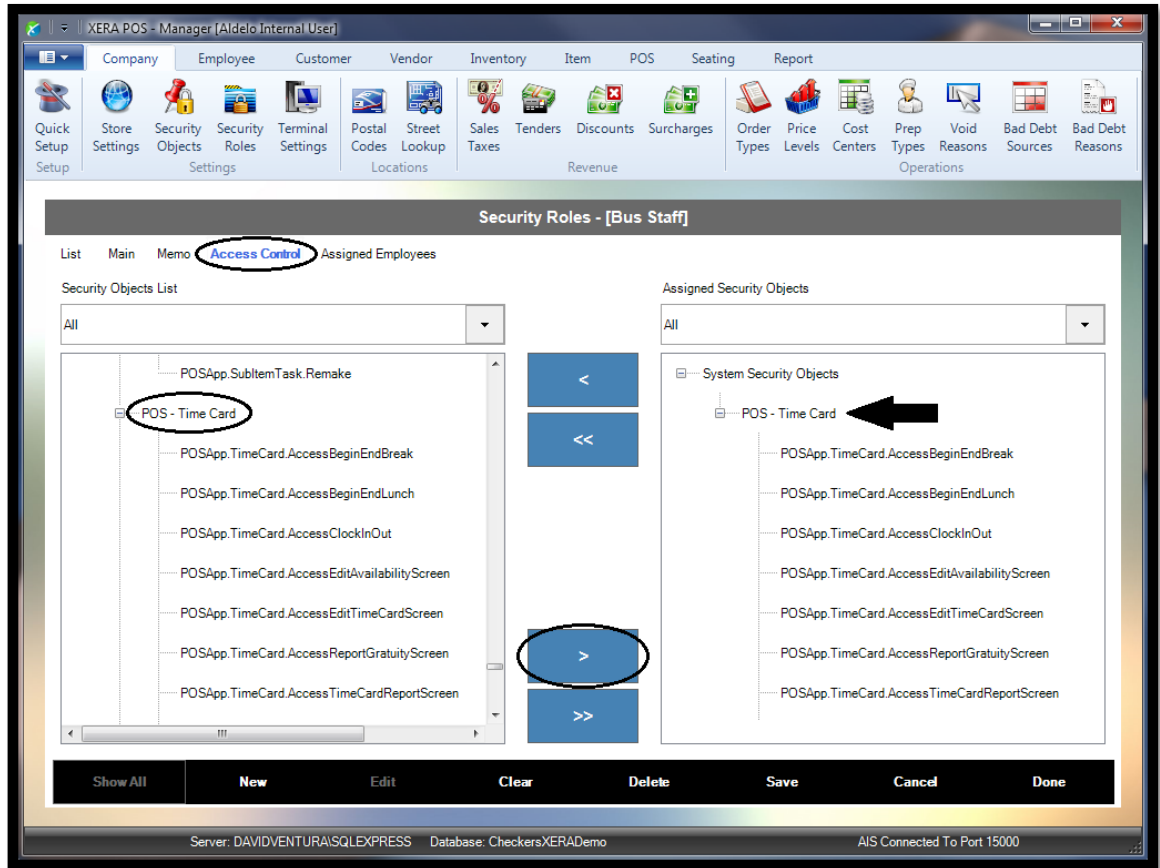



Figure 9-19

Entire groups of security objects or even individual security objects may be assigned to a security role in this manner.

Now assign the same POS – Time Card security objects group to the Kitchen Staff security role by following the same procedure. The time card features are the only security objects necessary for these two security roles.

For simplicity in our training purposes, we will assign all security objects to the remaining security roles (Bar Staff, Cashier, Delivery Driver, Hostess, Manager, Owner, and Wait Staff). For each security role, follow the steps listed above to select the security role. Click the *Access Control* Tab and then click the *double-right arrow* button .

This assigns all security objects in all security object groups to the selected security role at once, relieving the user from having to assign each security objects group to the security role individually (See Figure 9-20).

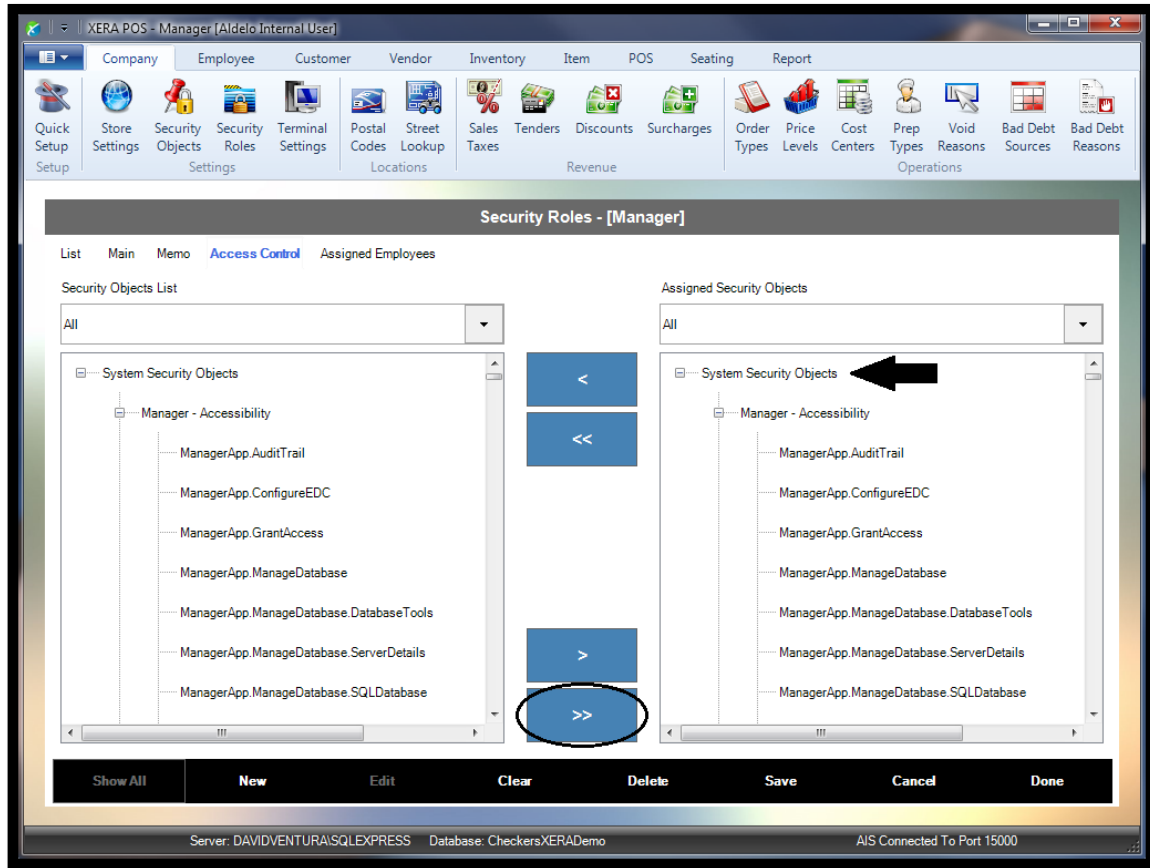




Figure 9-20

For your live installation of XERA® POS, you should only assign a security object to a security role if there is a need for employees assigned the particular security role to access the feature controlled by the security object. Your goal should be to grant all necessary access to each of your employees without granting unnecessary access.

To unassign a security object or group of security objects from a security role, select the security object or the security object group in the right column by clicking on it. Next, click the *left arrow* button  to complete the unassignment.

To unassign all security objects from a security role, click the *double-left arrow* button .

Terminal Settings

The Terminal Settings feature of XERA® POS allows the manager to create each of the computer terminals that will be used with the point-of-sale system.

MAIN TAB

New Terminal Settings are entered under the Main Tab.

To enter a new terminal, create a terminal number and enter it into the Terminal Number field. The Terminal Number is a user defined value that may be anything the manager wishes to call it. Please note that the terminal number is limited to a maximum of three digits, and spaces are not allowed.

Next, enter the logical Windows name of the computer in the Device Name field. The Device Name is the logical computer name in Microsoft Windows. If you don't know the Windows name of your computer, it may be found in Windows by navigating to **Control Panel > System and Security > System** and then checking the value listed for "Computer Name." The Terminal Number and Device Name fields are required fields.

In Terminal Settings, click on the *Main* Tab. Enter "1" in the terminal number field and then enter your Windows logical computer name in the Device Name field.

When finished, click the *New* button to save the terminal setting you just entered and begin entry of a new terminal setting (See Figure 9-21).

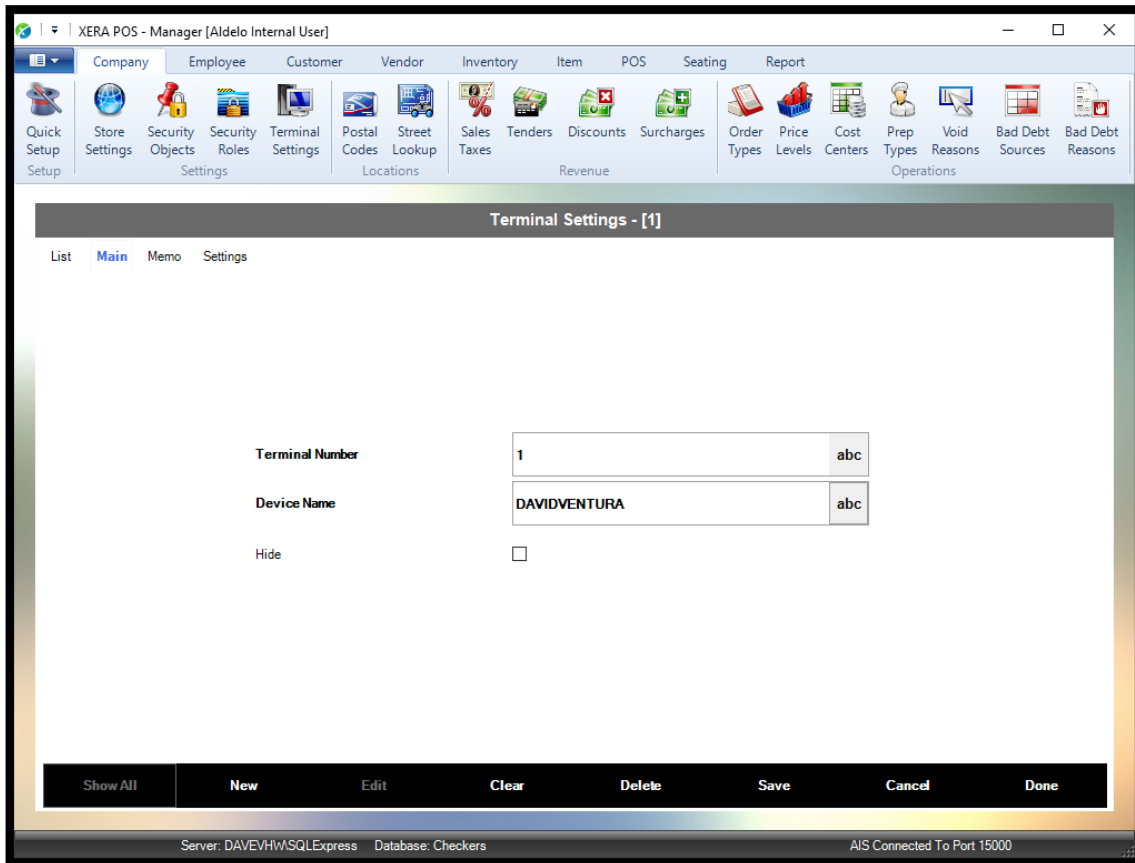


Figure 9-21

For our training purposes, we will only setup this single terminal; however, in your own installation of XERA® POS, you will setup each of your terminals as described above. Upon entry of each terminal, click the *New* button to save the information and enter another.

Upon entry of the last terminal, click the *Save* and *Done* buttons to save the information and exit the Terminal Settings screen.

SETTINGS TAB

Under the List Tab, double-click on 1 to display the terminal 1 settings under the Main Tab. Next, click on the *Settings* Tab. Here you setup the terminal settings for the selected terminal.

Weight Scale Settings

The Weight Scale Settings feature allows the user to activate the use of a weight scale for items that are sold by weight.

For our training purposes, we will leave the Weight Scale Integrated setting at its default value of *No*.

POS Settings

POS Settings include several settings that define how XERA® POS interacts with the user.

The Default Order Type setting dictates the order type that will display automatically. If you do not want to use a default order type, select the blank option at the top of the list. In this case, the user must always select the order type before entering a customer order.

Enable Repetitive Order Entry allows the user to close one order when finished entering it and remain in the Order Entry screen to begin a new order.

The POS Automatic Logout Seconds setting allows the entry of the number of seconds you wish to allow with no user activity before XERA® POS automatically logs the user off the system. When the user is logged off in this manner, he is required to perform the logon process again to regain access to the system.

The Enable Warning/Error/Failure Modal Alert options allow these messages to appear as screen popup messages in the center of the screen rather than simply as messages that display in the corner of the screen. When these options are enabled, the user is required to dismiss the popup messages by clicking on them to verify that the messages were viewed.

When enabled, the Auto Hide Numeric Input Pad option automatically hides the numeric input pad from the Order Entry screen.

The ‘Combine Any’ Requires Confirmation setting, when enabled, requires the user to confirm that he indeed wishes to combine two or more customer orders into an single order.

The final two settings (Enable Dynamic Receipt Printer Selection for Guest Check and EDC Draft and Enable Dynamic Kitchen/Bar Routing Selection Before Print Action Submit) are reserved for future use.

For our training purposes, we will leave all of the POS Settings at their default values.

Fast Bar Tab Settings

The Fast Bar Tab Settings feature allows the automatic creation of a bar tab when the customer’s credit card is swiped through the MSR device.

The Enable Fast Bar Tab Upon Credit Card Swipe in ‘New Order Type’ Screen When No Current Order is Loaded setting allows the automatic creation of a bar tab order when the customer’s credit card is swiped while the user is in the New Order Type screen.

The Enable Fast Bar Tab Upon Credit Card Swipe in ‘Order Recall’ Screen When No Current Order is Loaded setting allows the automatic creation of a bar tab order when the customer’s credit card is swiped while the user is in the Order Recall screen.

When one of the above options is enabled, the Fast Bar Tab Creation Order Type setting allows the user to select the order type that is automatically created. Click the *down arrow* button to the right of the Select Value field on the right side of the screen and then select the desired order type from the displayed list.

When enabled, the Fast Bar Tab Creation Show Limited Auth's Pre-Auth Selection (If Any) setting displays the pre-authorized bar tab limit when a bar tab is created automatically.

For our training purposes, we will leave the Fast Bar Tab settings at their default values.

POS Peripherals

POS Peripherals are additional hardware devices connected to your terminals, such as cash drawers, magnetic stripe reader (MSR) devices, receipt printers, pole displays, magnetic ink character recognition (MICR) devices, barcode scanners, etc.

For each peripheral setting that requires a device URL, select the device under POS Peripherals in the left column and then enter the device URL in the large textbox on the right side of the screen. Be sure to enter the URL in the format as displayed in the textbox.

Enabling the Open Cash Drawer Only on Cash and Other Tender option prevents the cash drawer from opening when the tender type is personal check, credit card, debit card, etc., as there is no need to issue change for these tender types.

Enabling the Suspend until Cash Drawer Closes option prevents the cashier from beginning a new transaction until the cash drawer is closed. This helps prevent employee theft.

The rest of these settings are self-explanatory. For our training purposes, we will leave the POS peripheral settings at their default values.

Recall Settings

Recall Settings dictate the default orders that appear when the recall feature is used. A default order status, a default order type, and a default server employee may be setup.

For our training purposes, we will leave the recall settings at their default values.

Cashier Span Settings

The Cashier Span settings allow the settling of customer orders on multiple terminals that act as though there is only a single terminal in use. The sales data for all terminals that are a part of the cashier span are recorded under the master terminal.

To use the cashier span feature, you must enable it and then select the terminal that you wish to assign as your master terminal from the dropdown list. Additional settings allow the acceptance of the various tender types by the terminals in the span group.

For our training purposes, we will leave the cashier span settings at their default values.

Hostess Settings

The Hostess features allow the hostess to assign tables to guest parties.

The selection of a default floor plan seating group controls the table diagram that appears by default when the business has two or more floor plan seating groups and the hostess features are in use.

Selecting the Enable Hostess Seating Assignment and Open Check for Server setting automatically starts a blank guest check for the server who is assigned to the table at which the guest party is seated.

The system may also print a seating chit, if desired.

For our training purposes, we will leave the hostess settings at their default values.

Simplification Settings

The Simplification Settings allow you to hide from the screen many of the actions that may be performed in XERA® POS, thereby disabling those features. Disabling those features that you don't use greatly reduces the number of buttons displayed on the screen and makes it easier for your employees to find their desired action quickly. Simply select the feature you wish to disable from the list on the left side of the screen and select *Yes* from the dropdown list on the right side of the screen to disable that feature.

For our training purposes, we will leave the simplification settings at their default values.

Terminal Themes

The Terminal Themes feature allows the user to set the POS screen width and screen height.

To do so, double-click on *Terminal Themes* to expand the feature and then select the appropriate option. Enter the desired screen dimension in the large textbox on the right side of the screen. Be sure to click the *Save* button when finished.

A user interface theme option may also be selected by choosing the desired theme from the dropdown list on the right side of the screen. Please note that if you change your terminal theme in this manner, the changes do not take effect until you exit the XERA® POS software and start it again.

For our training purposes, we will leave the terminal theme settings at their default values.

Chapter 10 — Company Locations

Postal Codes

The Postal Codes feature allows the manager to enter a list of postal codes and the counties, cities, and states/provinces to which they belong. XERA® POS uses this information wherever a postal code is required (for example, delivery areas, employee records, vendor records, etc.).

In Postal Codes, click the *New* button to display the Postal Codes – [Add New Record] screen. In the Postal Code field, enter “95350.” In the City field, enter “Modesto.” The County and Province/State fields are optional.

When finished, click the *New* button to save the postal code you just entered and begin a new one (See Figure 10-1).

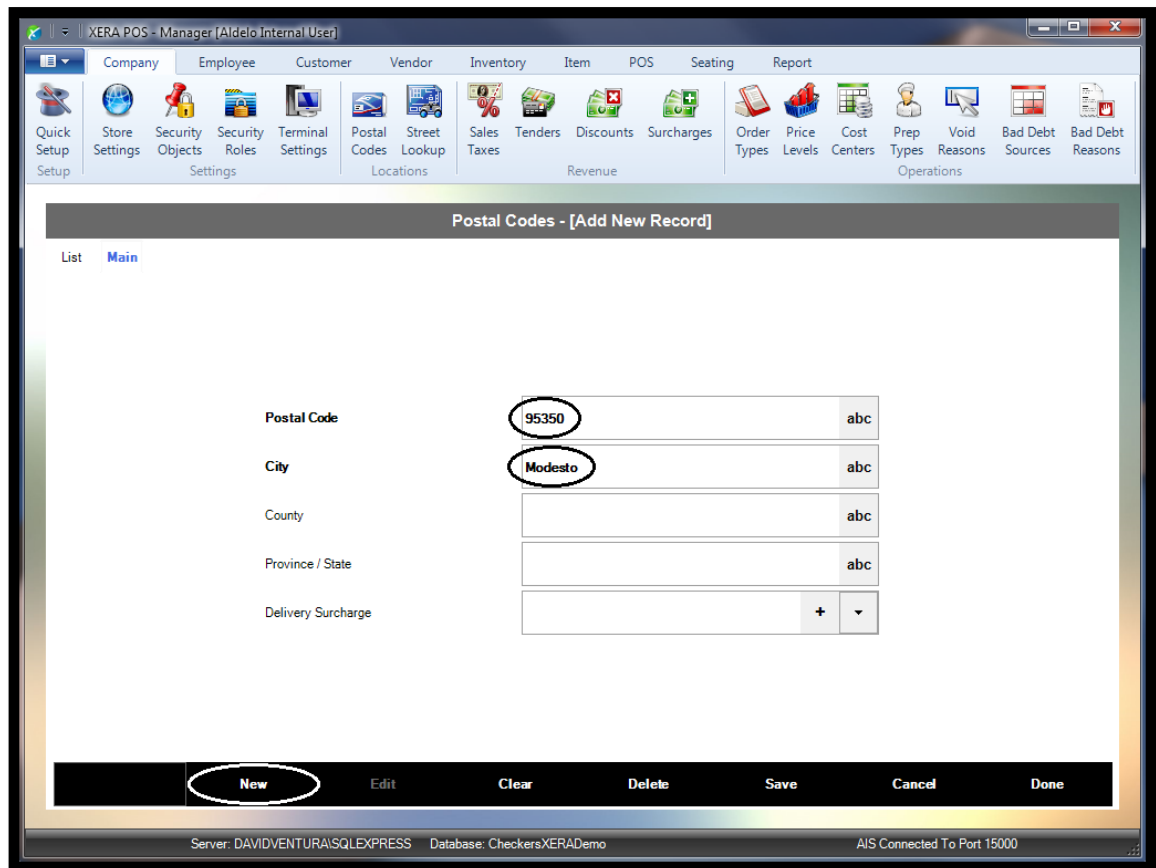


Figure 10-1

Now enter the rest of these postal codes and cities as listed in the following table:

Postal Code	City
95350	Modesto
95354	Modesto
95355	Modesto
95356	Modesto
95357	Modesto
95307	Ceres
95368	Salida
95382	Turlock

When you finish entering the above information, click the *Save* and *Done* buttons to save the information and exit the Postal Code feature.

Street Lookup

The Street Lookup feature allows the user to enter the names and street address number ranges of certain streets located within the postal codes entered above to which delivery service is either available or not available. The Delivery Surcharge assigned to these streets and street address number ranges may be different than those assigned to the general postal codes in which the streets are located.

In Street Lookup, click the *New* button to display the Street Lookup– [Add New Record] screen. In the Street Name field, enter “McHenry Ave.” In the Street Number Begin and Street Number End fields, enter “100” and “4000,” respectively. In the Map Code field, enter “C3” (the map code denotes the grid coordinates when using a paper street map). In the Postal Code field, enter “95355.” The unlabeled field beneath the Postal Code field is populated automatically with the city, based upon the information entered in the Postal Codes feature. Finally, select the *Delivery Service Not Available* checkbox to indicate that no deliveries may be made to this range of street addresses.

When finished, click the *New* button to save the street you just entered and begin a new one (See Figure 10-2).

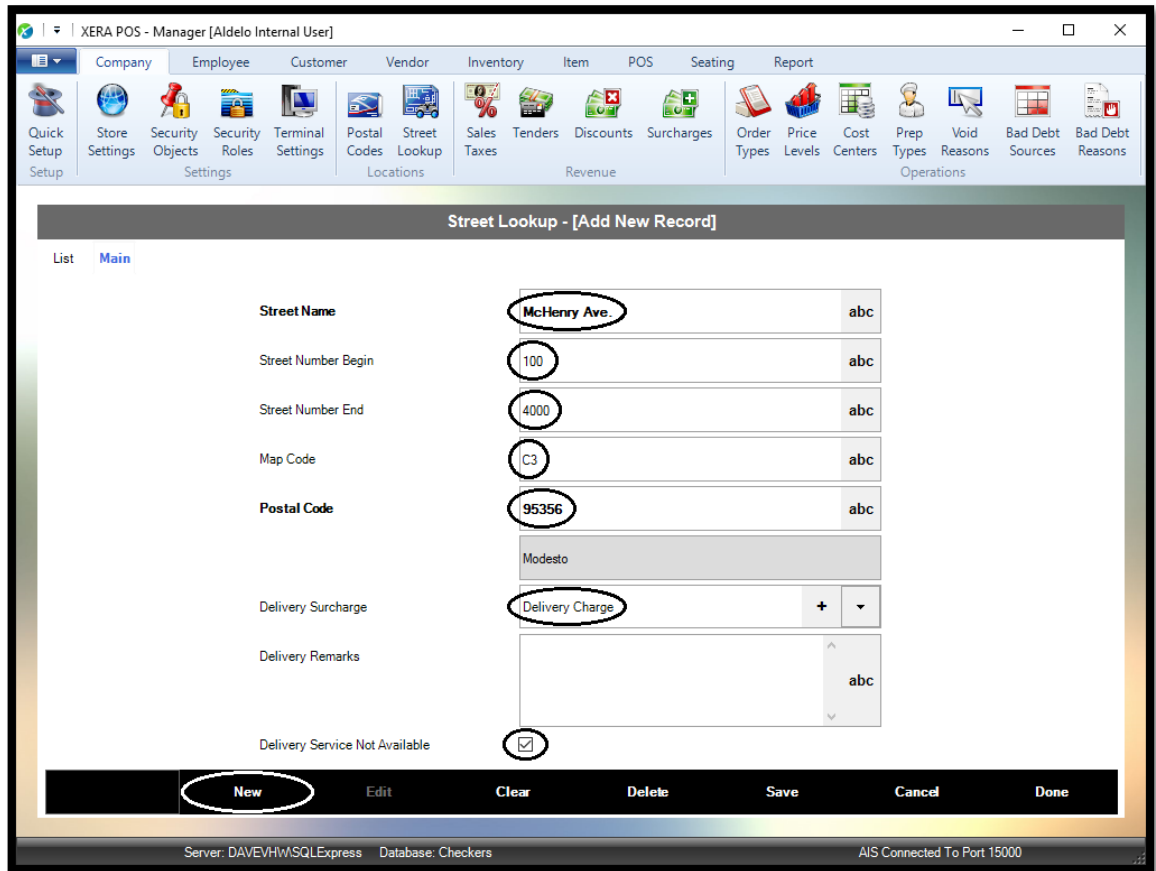


Figure 10-2

Now enter the rest of the information as listed in the following table:

Street Name	Street Number Begin	Street Number End	Map Code	Postal Code	Delivery Surcharge	Delivery Service Not Available
McHenry Ave.	100	4000	C3	95356		X
Fiedler Way	2600	3000	F5	95355	Delivery Charge	
Pelandale Ave.	3500	4000	J6	95355		X

When you finish entering the above information, click the *Save* and *Done* buttons to save the information and exit the Street Lookup feature.

Chapter 11 — Company Revenue

Sales Taxes

The Sales Taxes feature of XERA® POS allows the manager to program the calculation of sales taxes into the software so that the taxes are automatically calculated and added to the guest check. The software's level of sophistication allows virtually any system of sales tax calculation from any tax jurisdiction worldwide to be programmed into the system. A maximum of five levels of sales taxes may be entered. The entry of information is required in fields labeled with **bold** text.

The Tax Sequence Number determines the order in which the multiple taxes are applied.

The Tax Name may be anything you wish. The text entered here appears on the customer receipt to the left of the sales tax charged to the customer order.

In Sales Taxes, click the *New* button to display the Sales Taxes – [Add New Record] screen. In the Tax Sequence Number field, enter "1." In the Tax Name field, enter "Sales Tax." In the Tax Percent field, enter "7.375."

The rest of the fields (those where the field is not labeled in **bold** text) are optional. For our training purposes, we will leave them at their default values.

When finished, click the *New* button to save the sales tax entry you just entered and begin a new one (See Figure 11-1).

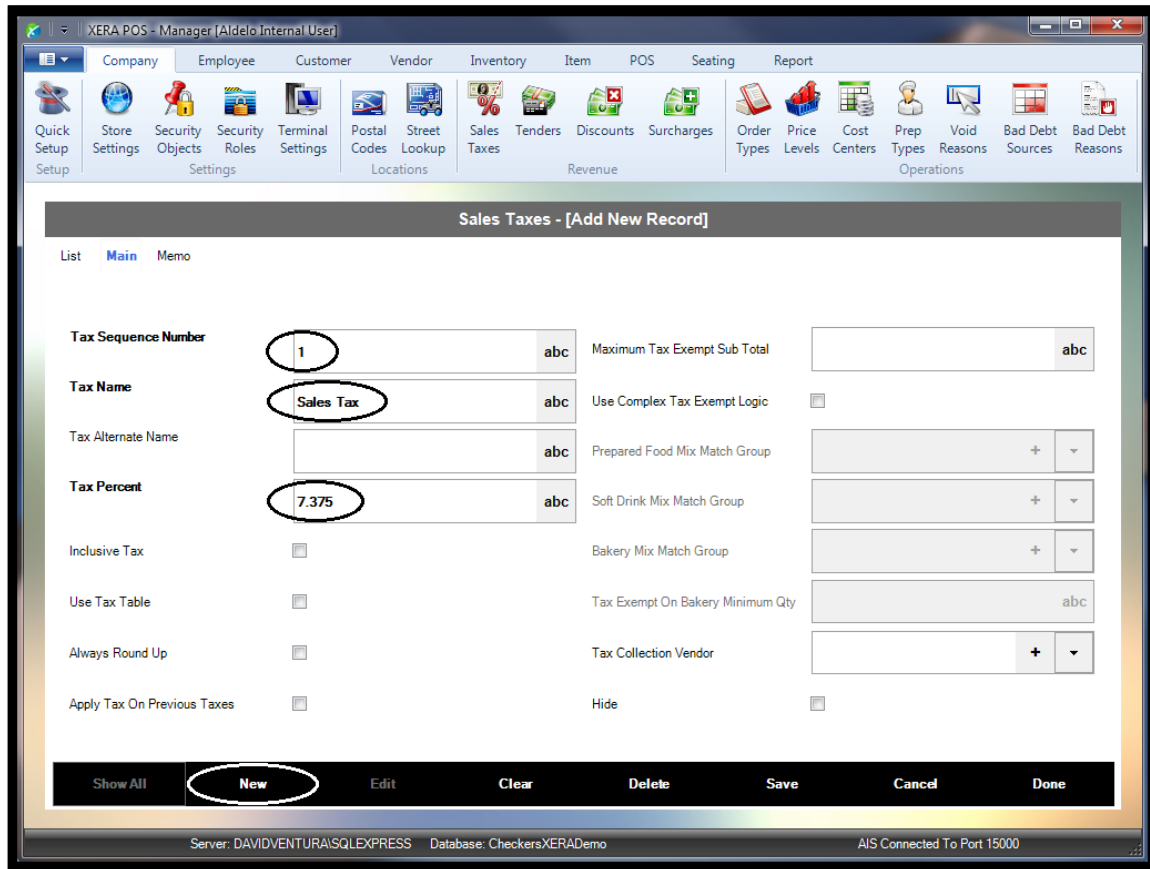


Figure 11-1

When finished entering all of your taxes, click the *Save* and *Done* buttons to save the information and exit the Sales Taxes feature.

Tenders

Tenders are the different payment types that are accepted by the merchant in payment for the goods and services received by the customer. Tenders are user defined in XERA® POS and the management may create as many tenders as necessary.

In Tenders, click the *New* button to display the Tenders – [Add New Record] screen. In the Tender Type dropdown list, select the type of tender you are creating and then enter a name for the tender in the Tender Name field.

The rest of the selections that are available depend upon the tender type selected and in some cases depend on selections that were made previously for the tender. For example, selecting the *Tender is Foreign Currency* checkbox enables the rest of the available selections in the lower left portion of the screen that are disabled by default.

Click the *New* button to begin entry of a new tender. Next, click the *down arrow* button to the right of the Tender Type field and select *Cash* as the tender type. Enter “Exact Cash” in the Tender Name field. On the right side of the screen, select the *Exact Tender* checkbox. Finally, enter “1” in the sort order field in the lower right portion of the screen.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the tender you just entered and begin a new one (See Figure 11-2).

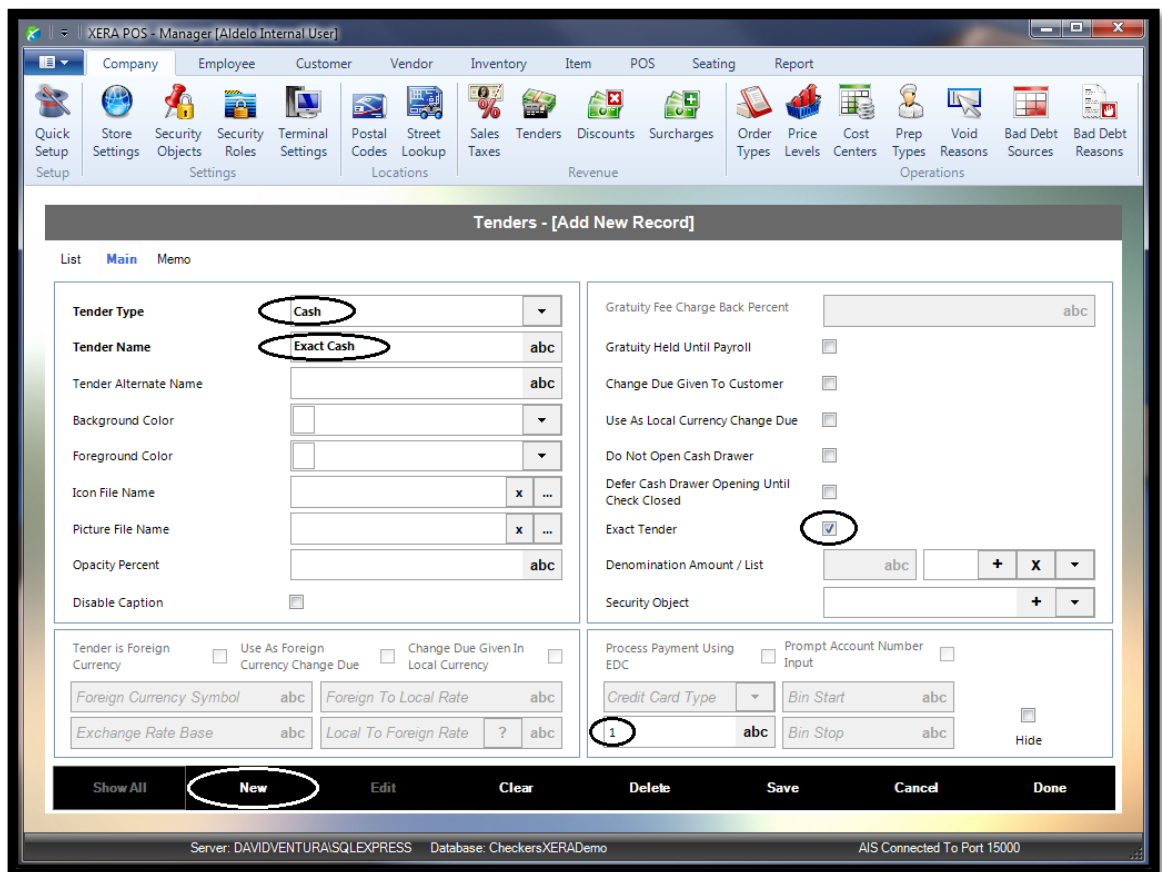


Figure 11-2

Now enter the rest of these tenders as listed in the following table:

Tender Type	Tender Name	Change Due Given to Customer	Use as Local Currency Change Due	Exact Tender	Denom. Amount	Denom. List	Process Payment Using EDC	Credit Card Type	Bin Start / Stop	Sort Order
Cash	Exact Cash			✓						1
Cash	\$1.00	✓			1.00					2
Cash	\$2.00	✓			2.00					3
Cash	\$5.00	✓			5.00					4
Cash	\$10.00	✓			10.00					5
Cash	\$20.00	✓			20.00					6
Cash	\$50.00	✓			50.00					7
Cash	\$100.00	✓			100.00					8
Cash	Cash	✓	✓			100.00 50.00 20.00 10.00 5.00 2.00 1.00 0.50 0.25 0.10 0.05 0.01				9
Credit Card	Visa						✓	Visa		10
Credit Card	Master Card						✓	Master Card		11
Debit Card	Debit Card									12
Gift Card	Gift Card						✓		6036/ 6036	13
Gift Card	EBT Card									14
Cash	Canadian Dollar	✓								15
Cash	Euro	✓								16

When finished, click the *Save* and *Done* buttons to save the last tender entered and exit the Add Tenders screen.

Discounts

Discounts are special price reductions that may be applied to customer orders. A discount may be applied to a single menu item, a group of menu items, or to an entire customer order. Discounts are user defined in XERA® POS and may be created for any reason desired by the management.

(Please note that the Mix Match Groups feature under the Item Tab should be setup in advance of creating one of the following discounts. The setup of Mix Match Groups is covered later in this manual.)

In Discounts, click on the *New* button to display the Discounts – [Add New Record] screen. Click the *down arrow* button to the right of the Discount Target Type field and select *Both Orders & Items* as the discount type. Enter “Senior Discount” in the Discount Name field.

Next, click the *down arrow* button to the right of the Discount Basis field and select *Percent* as your discount basis. Finally, in the Discount Rate field, enter “20” as your discount percentage.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the discount you just entered and begin a new one (See Figure 11-3).

The screenshot displays the 'Discounts - [Add New Record]' window in the XERA POS Manager. The window title is 'XERA POS - Manager [Aldelo Internal User]'. The interface includes a menu bar at the top with options: Company, Employee, Customer, Vendor, Inventory, Item, POS, Seating, and Report. Below the menu bar is a toolbar with icons for various functions: Quick Setup Setup, Store Settings, Security Objects, Security Roles, Terminal Settings, Postal Codes, Street Lookup, Sales Taxes, Tenders, Discounts, Surcharges, Order Types, Price Levels, Cost Centers, Prep Types, Void Reasons, Bad Debt Sources, and Bad Debt Reasons. The main area is divided into sections for discount details and tax settings. The 'Discount Target Type' is set to 'Both Order & Items', 'Discount Name' is 'Senior Discount', 'Discount Basis / Rate' is set to 'Percent' with a rate of '20'. The 'New' button at the bottom is also circled. The screen includes a status bar at the bottom with the text: 'Server: DAVIDVENTURA\SQLEXPRESS Database: Checkers.XERADemo AIS Connected To Port 15000'.

Figure 11-3

Now enter the rest of these discounts as listed in the following table:

Discount Target Type	Discount Name	Discount Basis	Discount Rate
Both Order & Items	Senior Discount	Percent	20
Both Order & Items	Student Discount	Percent	10
Order Level Only	Employee Discount	Percent	35
Item Level Only	Free Soda with Appetizer	Amount	1.75

When finished, click the *Save* button to save the last discount entered.

Now click the List Tab and double-click on the *Free Soda with Appetizer* discount to open it under the Main Tab, as additional information must be entered for this discount. On the right side of the screen, enter the information as listed in the following table:

Discount Name	Discount Qualified Mix Match Group	"Buy One Get One (BOGO)" Basis	"BOGO - Buy" Quantity Required	"BOGO - Get" Qualified Mix Match Group	"BOGO - Get" Quantity Allowed
Free Soda with Appetizer	Appetizers	Any Value	1	Free Soda with Appetizer	1

With this discount, the customer receives a soda free when an appetizer is ordered. For the discount to be valid, the customer must order both an appetizer and a soda. When the waitperson applies the discount, the soda appears on the guest check at no charge.

When finished, click the *Save* and *Done* buttons to save the information you just entered and exit the Discounts screen.

Surcharges

Surcharges are additional charges that may be applied to a customer order for special services. Surcharges are user defined in XERA® POS and may be created for any reason desired by the management.

In Surcharges, click on the *New* button to display the Surcharges – [Add New Record] screen. Click the *down arrow* button to the right of the Surcharge Type field and select *Gratuity Surcharge* as the surcharge type. Enter “Party of 8 or More” in the Surcharge Name field.

Next, click the *down arrow* button to the right of the Surcharge Basis field and select *Percent* as your surcharge basis. Finally, in the Surcharge Rate field, enter “18” as your surcharge percentage.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the surcharge you just entered and begin a new one (See Figure 11-4).

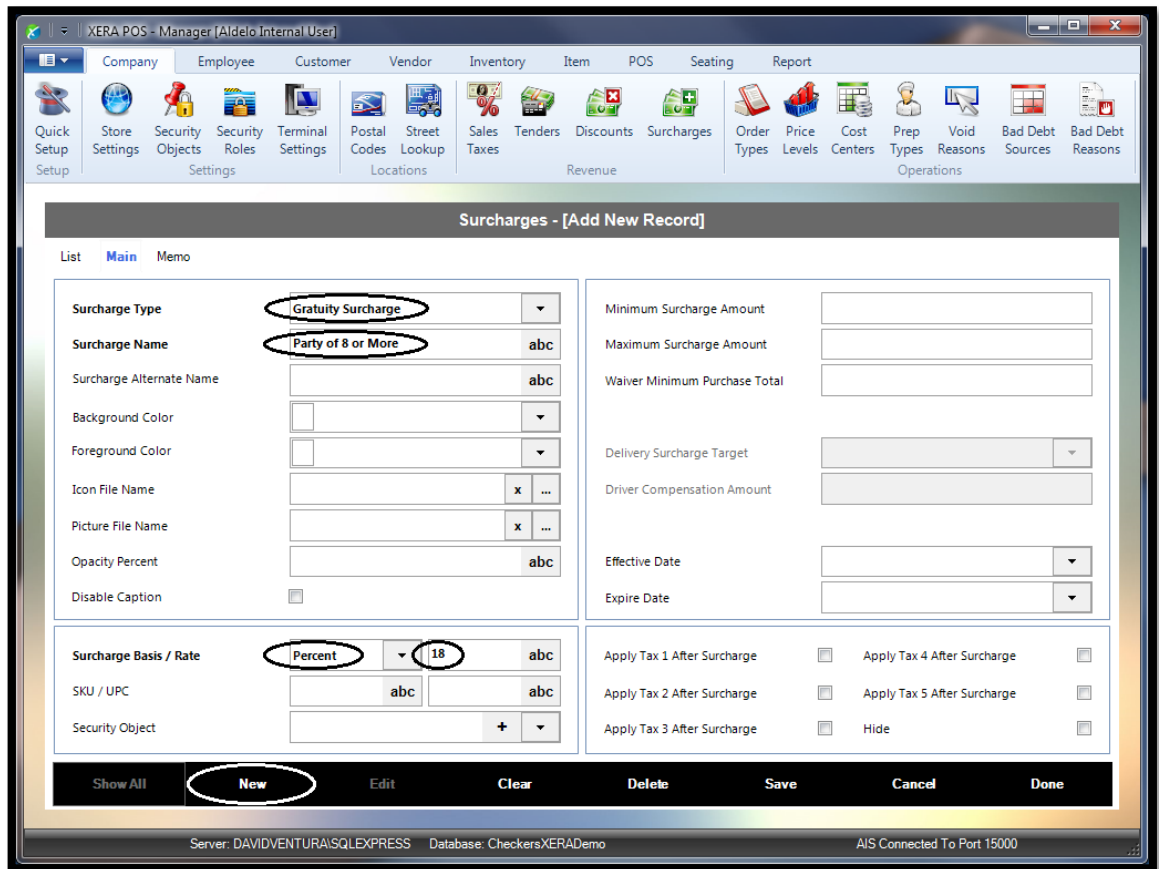


Figure 11-4

Now enter the rest of these surcharges as listed in the following table:

Surcharge Type	Surcharge Name	Surcharge Basis	Surcharge Rate
Gratuity Surcharge	Party of 8 or More	Percent	18.00%
Order Surcharge	Corkage Fee	Amount	\$5.00
Order Surcharge	Use of Private Room	Amount	\$100.00
Order Surcharge	Customer Dessert Fee	Amount	\$10.00

When finished, click the *Save* and *Done* buttons to save the last surcharge entered and exit the Add Surcharge screen.

Chapter 12 — Company Operations

Order Types

In XERA® POS, Order Types are user defined. Any number of order types may be created, and they may be assigned to security objects so that the manager can control which employees may create orders of the various order types.

In Order Types, click on the *New* button to display the Order Types – [Add New Record] screen. Enter “Dine In” in the Order Type Name field. Next, enter “10” in the Sort Order field near the bottom of the screen.

Next, click the *Settings 1* Tab and select the *Is Dine In Service* checkbox.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the order type you just entered and begin a new one (See Figure 12-1).

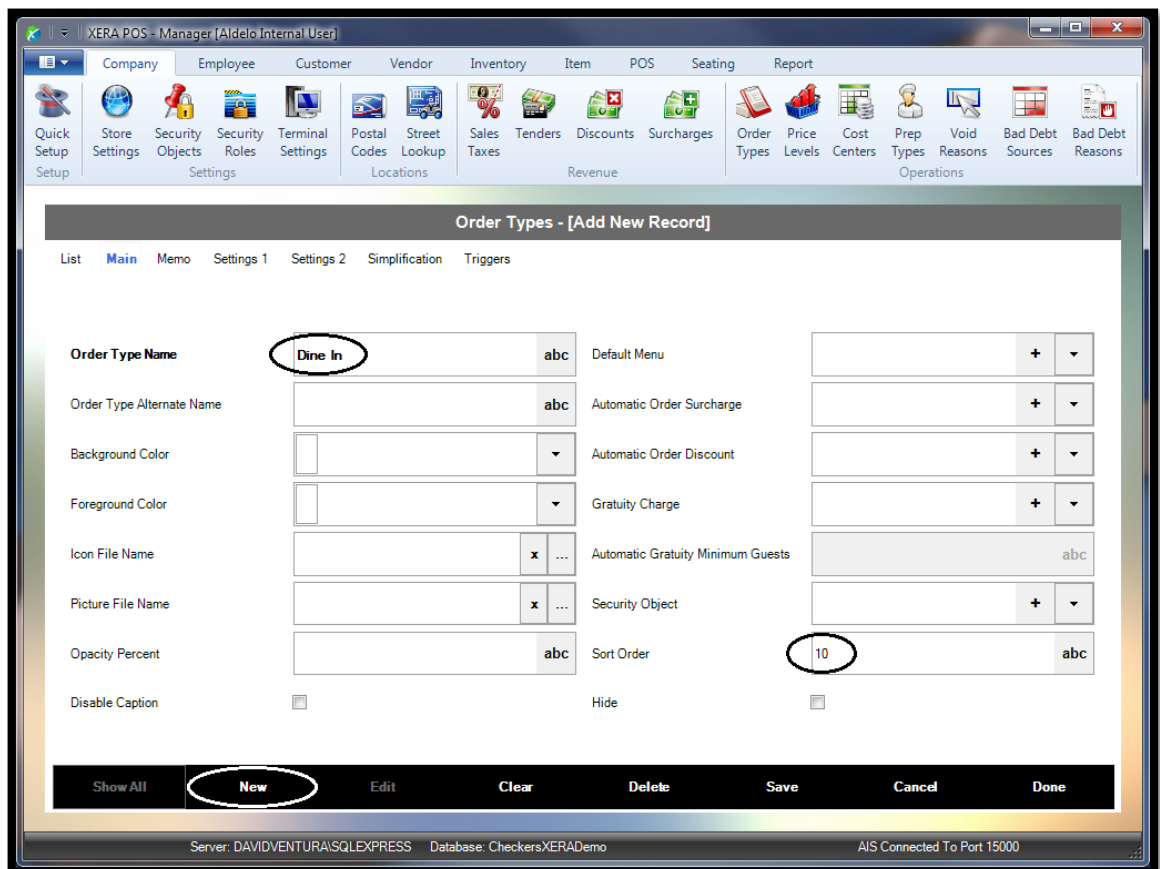


Figure 12-1

Now enter the rest of these order types and settings as listed in the following table:

Order Type	Sort Order	Settings 1 Tab Checkbox
Dine In	10	Is Dine In Service ✓
Take Out	20	-
Drive Through	30	Is Drive Thru Service ✓
Delivery	40	Is Delivery Service ✓

If you don't enter values for the sort order numbers, then the order types display under the List Tab in ascending alphabetical order. By entering sort order numbers you can control the order in which you want them displayed. By numbering your sort orders in multiples of ten, you allow yourself room to add additional order types in the future between the existing order types without the necessity of renumbering all of your existing sort order numbers.

When finished, click the *Save* and *Done* buttons to save the last order type entered and exit the Add Order Type screen.

Price Levels

The Price Levels feature of XERA® POS allows the creation of different pricing structures that may be used at different times or for different types of customers. The price levels are created and then the pricing based upon each price level is assigned to the menu item when the menu item is created. The application of discounts may also be restricted to apply to specific pricing levels only.

In Price Levels, click on the *New* button to display the Price Levels – [Add New Record] screen. Enter “Standard Pricing” in the Price Level Name field. Next, select the *Default Price Level* checkbox near the bottom of the screen. We will leave the rest of the settings at their default values.

When finished, click the *New* button to save the price level you just entered and begin a new one (See Figure 12-2).

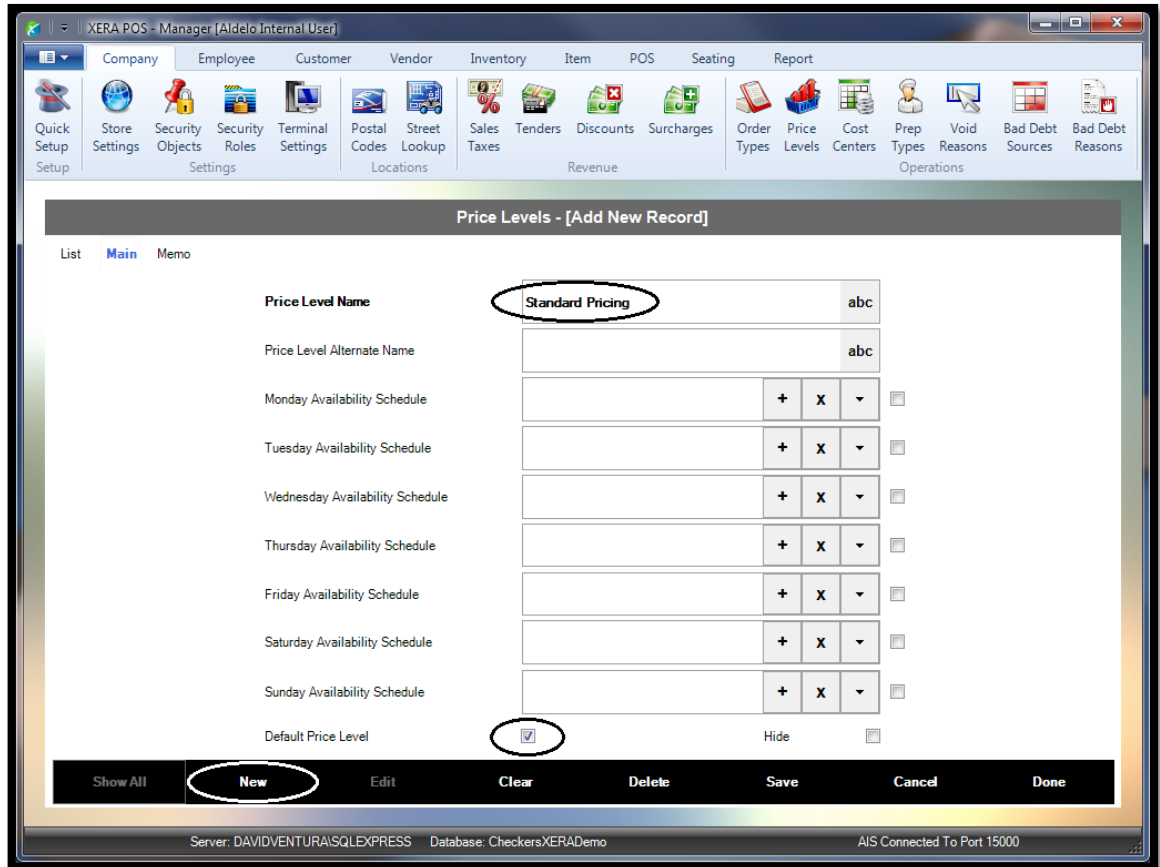


Figure 12-2

Now enter the rest of these price levels as listed in the following table:

Price Level	Default Price Level
Standard Pricing	✓
Senior Pricing	-
Student Pricing	-

When finished entering all of your price levels, click the *Save* and *Done* buttons to save the information and exit the Add Price Level screen.

Cost Centers

The Cost Centers feature of XERA® POS allows the creation of different costing groups. Cost Centers are used for categorizing reports.

Cost Centers are set in POS Prep Device Locations so that a report may be generated that shows how much inventory is used at these specific logical locations. POS prep device locations are covered later in this training manual.

In Cost Centers, click on the *New* button to display the Cost Centers [Add New Record] screen. Enter “Bar” in the Cost Center Name field. We will leave the rest of the settings at their default values.

When finished, click the *New* button to save the current cost center and begin a new one (See Figure 12-3).

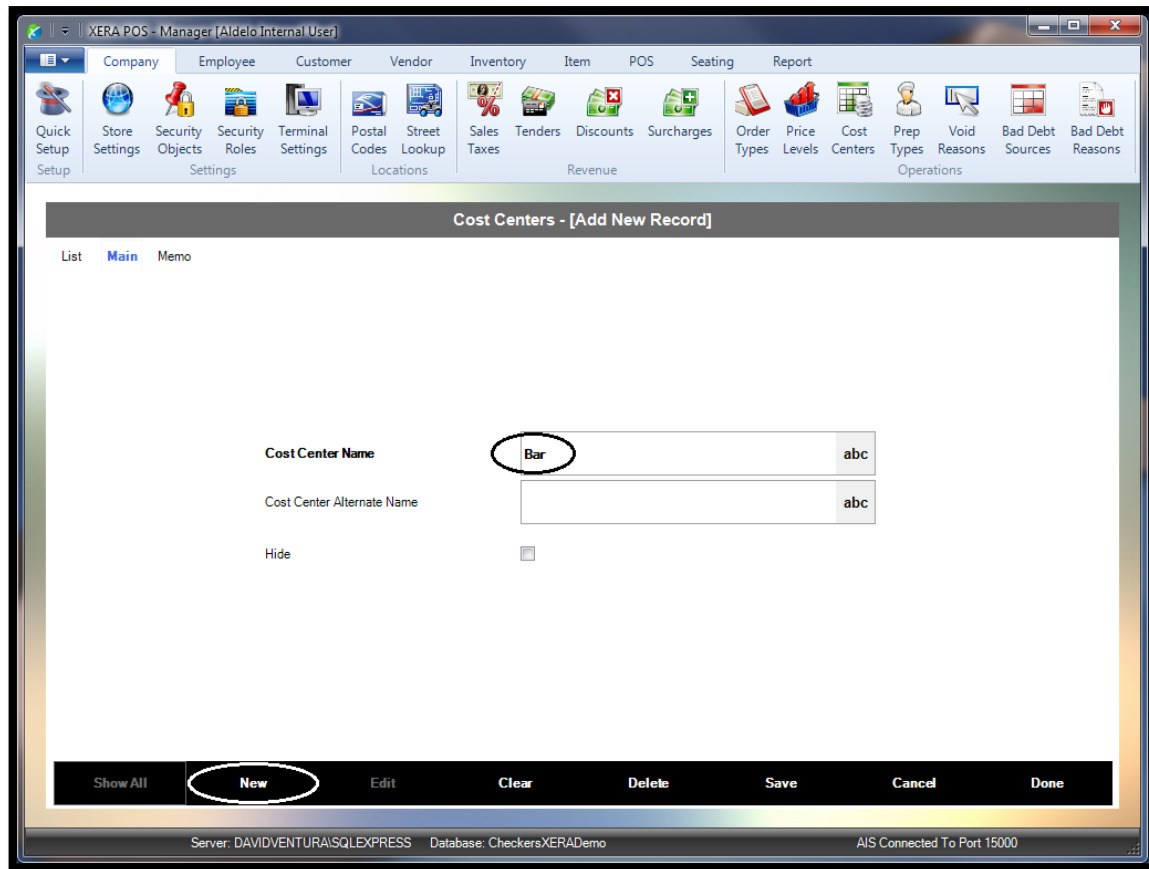


Figure 12-3

Now enter the rest of these cost centers as listed in the following table:

Cost Center
Back Storage
Bar
Beverage Station
Cashier Station
Dessert Station
Salad Station
Grill Station
Appetizer Station
Kitchen
Gift Shop

When finished, click the *Save* and *Done* buttons to save the last cost center entered and exit the Add Cost Center screen.

Prep Types

Prep Types allow the association of general preparation instructions for individual or groups of menu items with those menu items on the kitchen chit and on the guest check. These associated instructions may be displayed in the desired order.

In Prep Types, click on the *New* button to display the Prep Types [Add New Record] screen. Enter “Soft Drinks” in the Prep Type Name field. Next, enter “10” in the Print Sequence Order field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the prep type you just entered and begin a new one (See Figure 12-4).

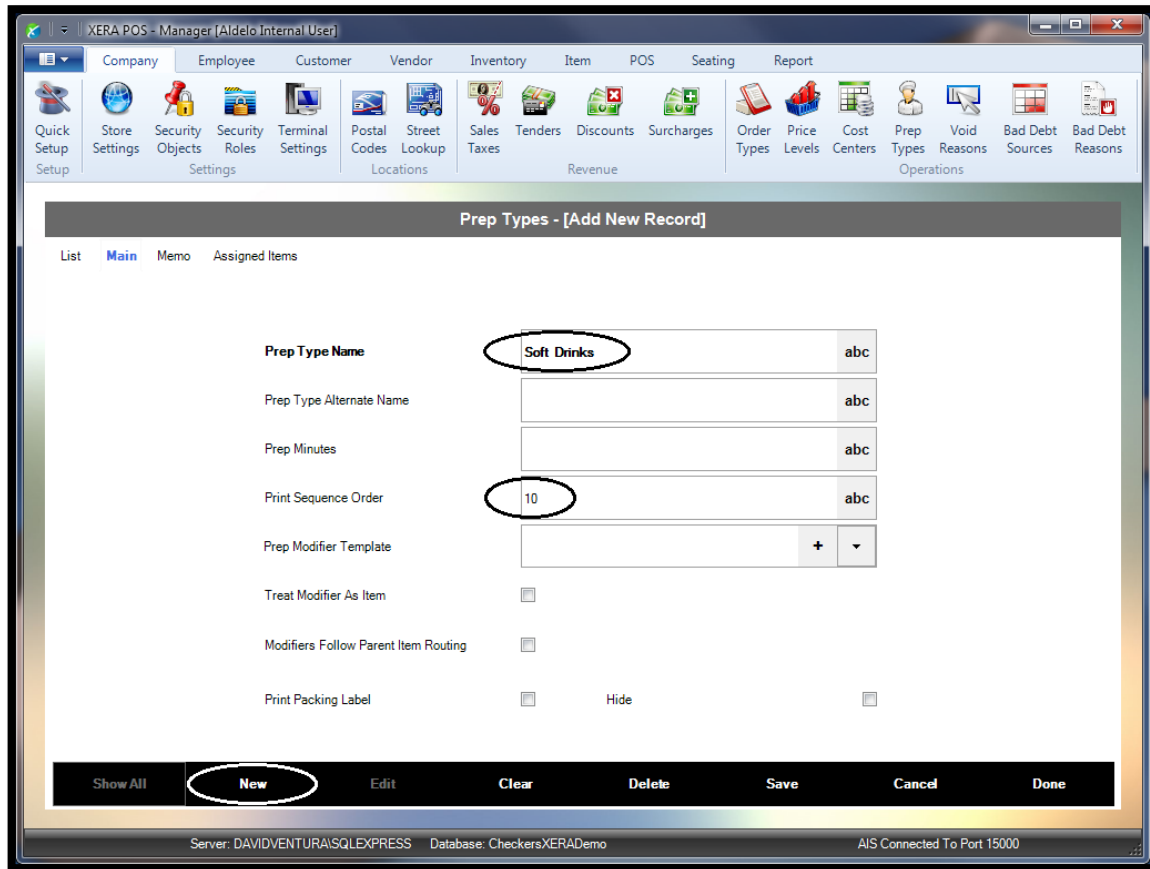


Figure 12-4

Now enter the rest of these prep types as listed in the following table:

Prep Type	Print Sequence Order
Soft Drinks	10
Alcoholic Beverages	20
Appetizers	30
Salads	40
Grill	50
Entrees	60
Side Orders	70
Desserts	80

If you don't enter values for the Print Sequence Order, then the prep types display on your kitchen chits and guest checks in ascending alphabetical order. By entering print sequence order numbers, you can control the order in which you want them displayed.

By numbering your print sequence order numbers in multiples of ten, you allow yourself room to display additional prep types in the future between the existing prep types without the necessity of renumbering all of your existing print sequence order numbers.

When finished, click the *Save* and *Done* buttons to save the last prep type entered and exit the Add Prep Type screen.

Void Reasons

Void Reasons are created in advance in XERA® POS so that they may be selected by simply clicking on them, thus eliminating the time consuming process of entering void reasons manually via an onscreen virtual keyboard each time an item or order must be voided. The text of the void reasons may be anything that the manager desires and the reasons are customizable to the business.

In Void Reasons, click on the *New* button to display the Void Reason [Add New Record] screen. Enter "Order Error" in the Void Reason Name field. Next, select *Line Level Only* from the Void Target Type field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the void reason you just entered and begin a new one (See Figure 12-5).

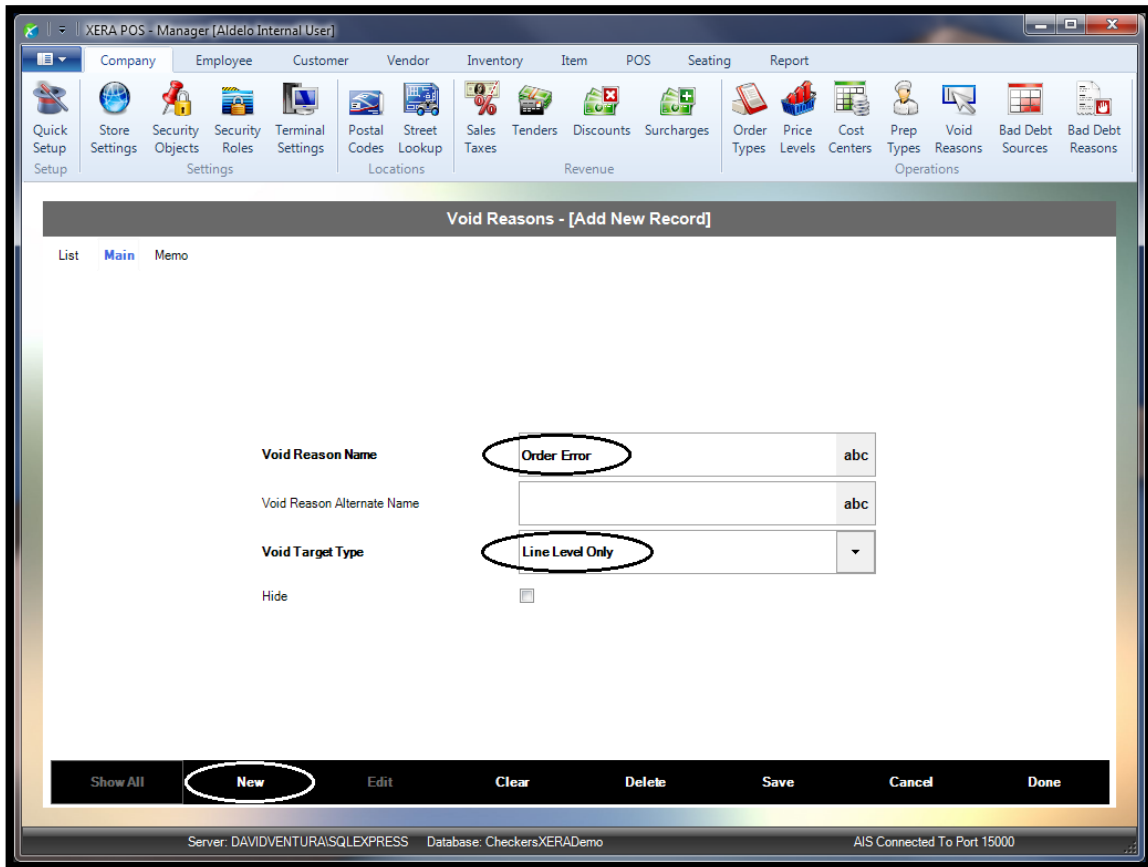


Figure 12-5

Now enter the rest of these void reasons as listed in the following table:

Void Reason Name	Void Target Type
Order Error	Line Level Only
Kitchen Error	Line Level Only
Overcooked	Line Level Only
Not as Expected	Both Order and Lines
Dissatisfied	Both Order and Lines
Walked Out	Order Level Only
No Show	Order Level Only

When finished, click the *Save* and *Done* buttons to save the last void reason entered and exit the Add Void Reasons screen.

Bad Debt Sources

Bad Debt Sources are created in advance in XERA® POS so that they may be selected by simply clicking on them, thus eliminating the time consuming process of entering bad debt sources manually via an onscreen virtual keyboard each time a bad debt is encountered by the user. The text of the bad debt sources may be anything that the manager desires and they are customizable to the business.

In Bad Debt Sources, click on the *New* button to display the Bad Debt Sources [Add New Record] screen. Enter “Debit Card” in the Bad Debt Source Name field. For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the bad debt source you just entered and begin a new one (See Figure 12-6).

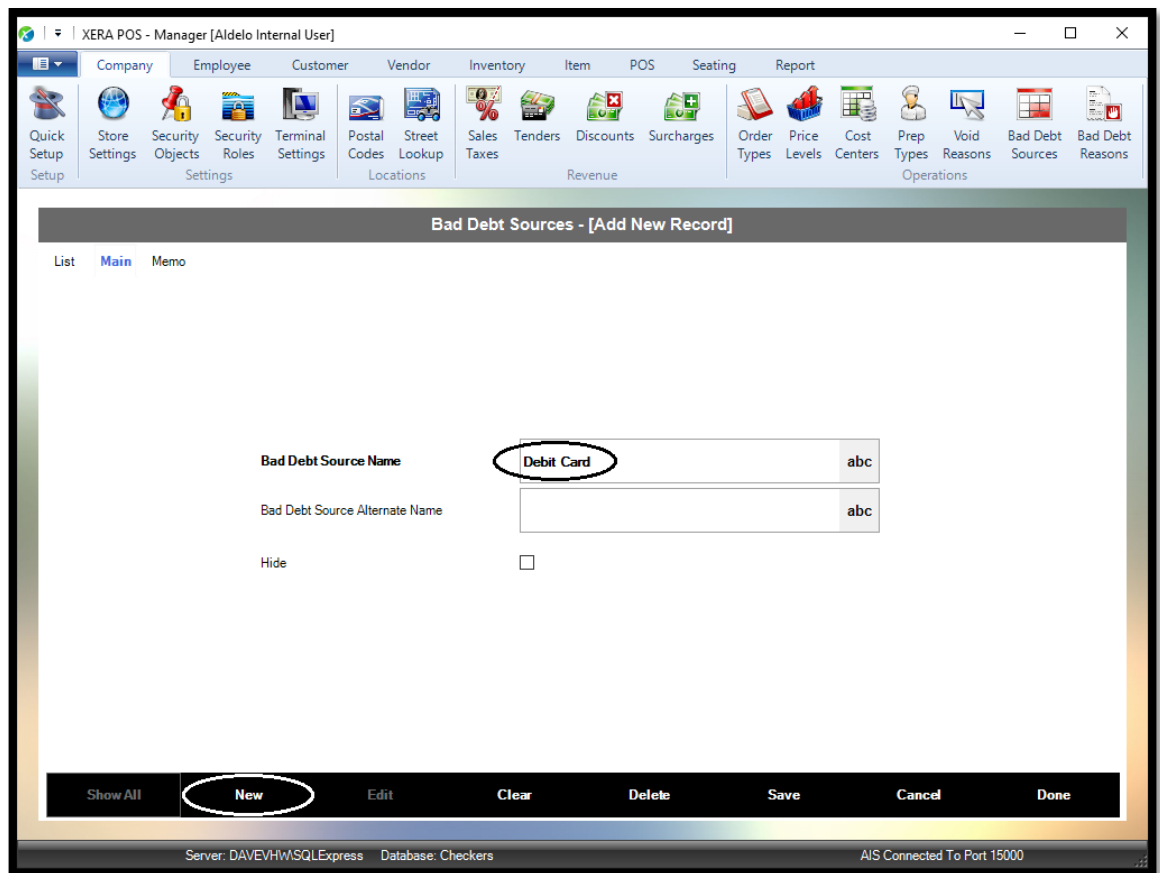


Figure 12-6

Now enter the rest of these bad debt sources as listed in the following table:

Bad Debt Source Name
Debit Card
Check

When finished, click the *Save* and *Done* buttons to save the last bad debt source entered and exit the Bad Debt Sources screen.

Bad Debt Reasons

Bad Debt Reasons are created in advance in XERA® POS so that they may be selected by simply clicking on them, thus eliminating the time consuming process of entering bad debt reasons manually via an onscreen virtual keyboard each time a bad debt is encountered by the user. The text of the bad debt reasons may be anything that the manager desires and they are customizable to the business.

In Bad Debt Reasons, click on the *New* button to display the Bad Debt Reasons [Add New Record] screen. Enter “Account Closed” in the Bad Debt Reason Name field. For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the bad debt reason you just entered and begin a new one (See Figure 12-7).

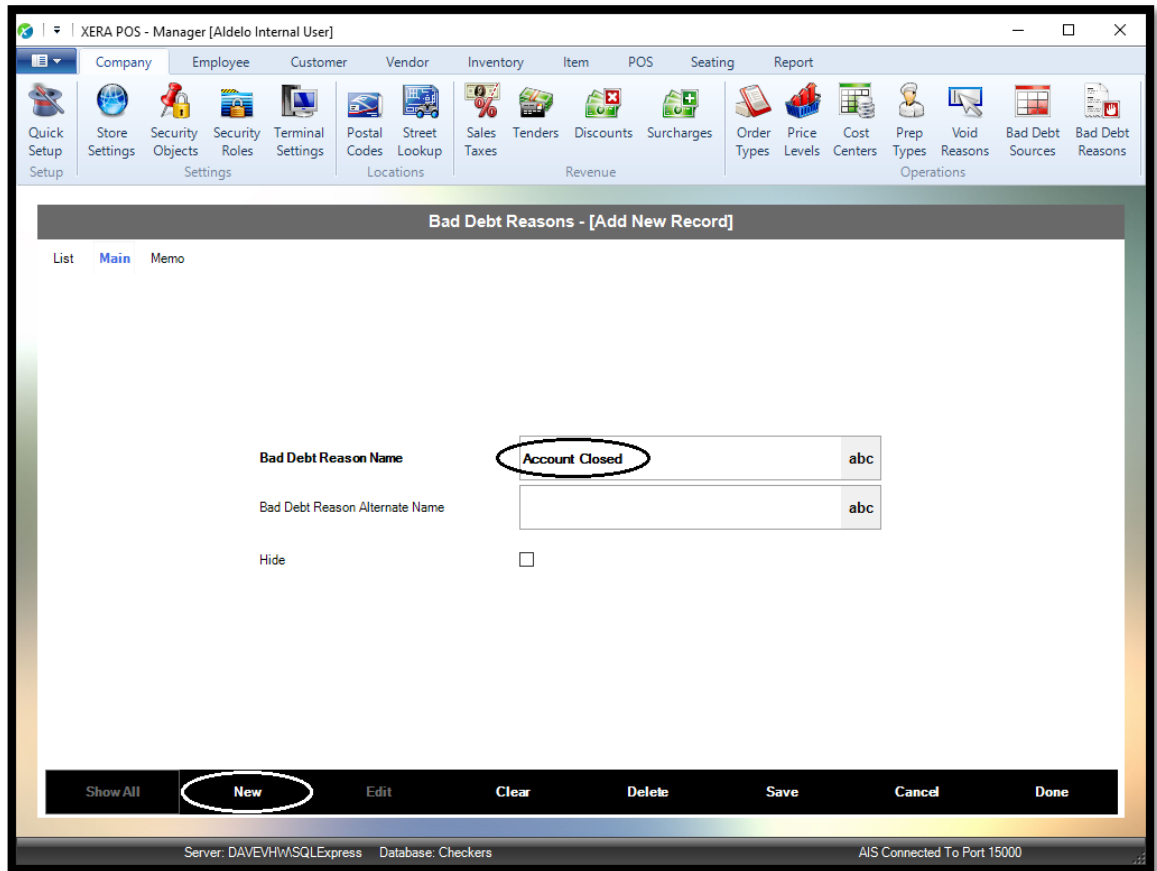


Figure 12-7

Now enter the rest of these bad debt reasons as listed in the following table:

Bad Debt Reason Name
Account Closed
Charge Back
Fraudulent Charge
Invalid Account
Non Sufficient Funds

When finished, click the *Save* and *Done* buttons to save the last bad debt reason entered and exit the Bad Debt Reasons screen.

Chapter 13 — Employee List

HR Departments

HR (Human Resources) Departments are defined as the general categories of workers employed by a business. Each HR department can have multiple job titles within it.

For example, in a restaurant, the HR departments might consist of the wait staff, the kitchen staff, the management, the bar staff, etc. HR departments should not be confused with job titles, which are covered in the following section.

In HR Departments, click on the *New* button to display the HR Departments [Add New Record] screen. Enter “Management” in the HR Department Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the HR department and begin a new one (See Figure 13-1).

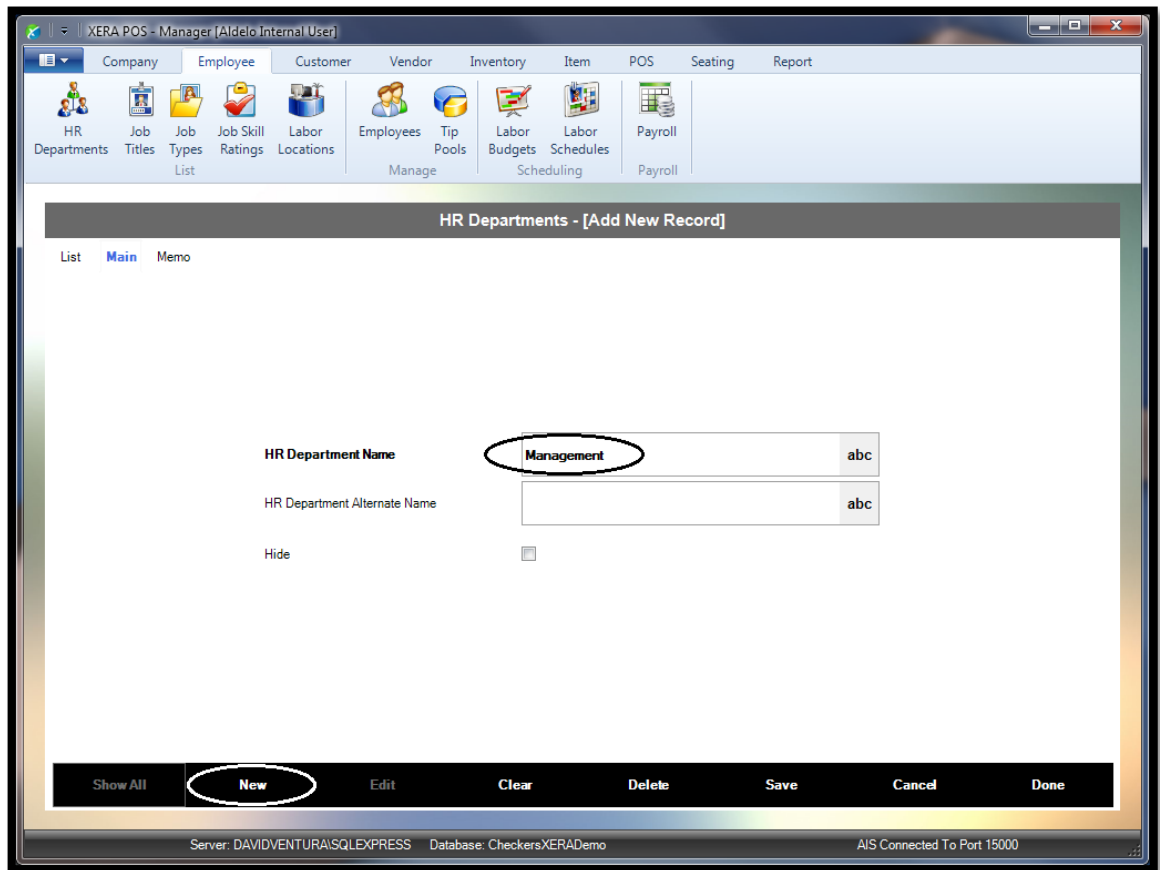


Figure 13-1

Now enter the rest of these HR departments as listed in the following table:

HR Department
Management
Kitchen Staff
Wait Staff
Bar Staff
Cashiers
Delivery Drivers

When finished, click the *Save* and *Done* buttons to save the last HR department entered and exit the Add HR Department screen.

Job Titles

Job Titles are defined as the names given to specific groups of tasks that are performed by employees.

For example, for the job title “Chef,” the employee might be required to create menus, prepare customer orders, monitor inventory levels and reorder when necessary, supervise the entire kitchen staff, etc.

For the job title “Waitperson,” the employee might be required to take customer orders, serve customer orders, handle customer requests, etc.

Each job title is assigned to a specific HR (Human Resources) department.

In Job Titles, click on the *New* button to display the Job Titles [Add New Record] screen. Enter “General Manager” in the Job Title Name field. Click the *down arrow* button to the right of the HR Department field and select *Management* from the list. Next, click the *down arrow* button to the right of the Pay Basis field and select *Annual Salary* from the list. Finally, enter “50000.00” in the Regular Pay Rate field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the job title you just entered and begin a new one (See Figure 13-2).

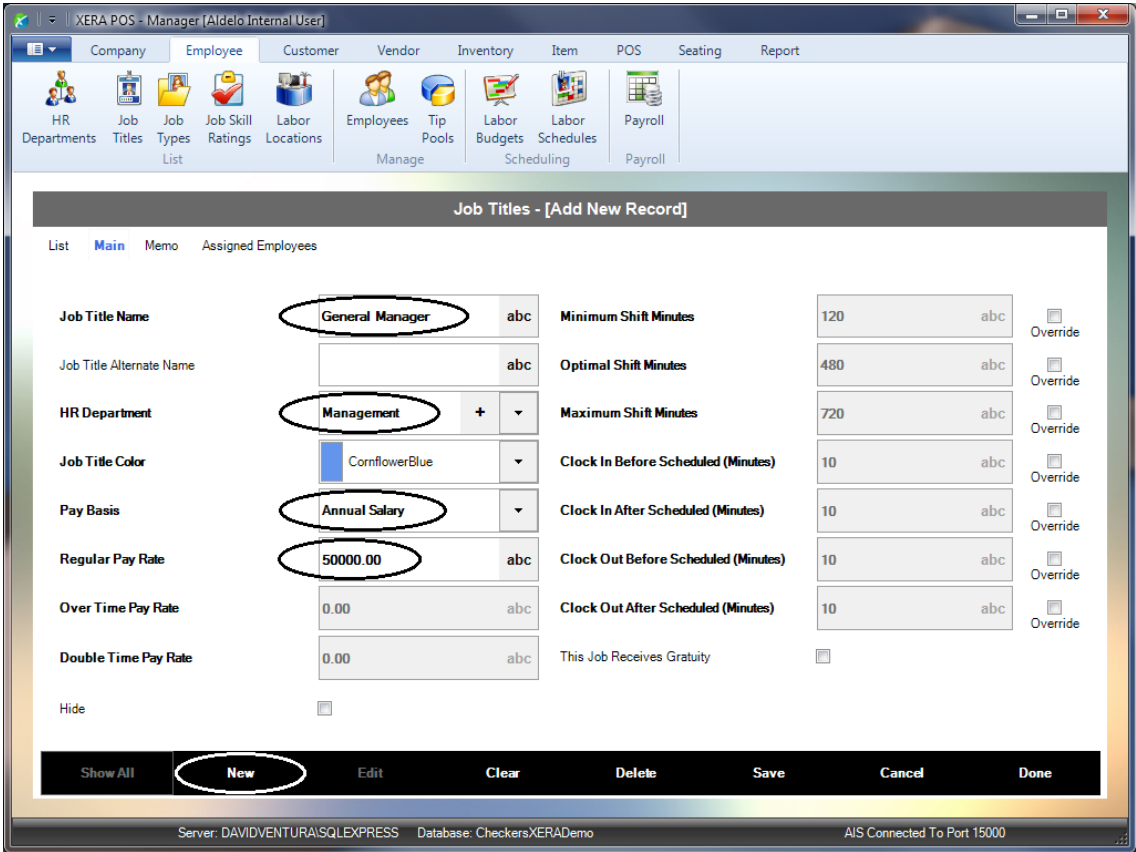


Figure 13-2

Now enter the rest of these job titles as listed in the following table:

Job Title Name	HR Department	Pay Basis	Regular Pay Rate	This Job Receives Gratuity
General Manager	Management	Annual Salary	50000.00	
Bartender	Bar Staff	Hourly Wage	12.00	✓
Bus Person	Wait Staff	Hourly Wage	9.00	✓
Cashier	Cashiers	Hourly Wage	10.00	✓
Chef	Kitchen Staff	Hourly Wage	25.00	
Cook	Kitchen Staff	Hourly Wage	15.00	
Delivery Driver	Delivery Drivers	Hourly Wage	10.00	✓
Dishwasher	Kitchen Staff	Hourly Wage	8.00	✓
Owner	Management	Annual Salary	80000.00	
Wait Person	Wait Staff	Hourly Wage	10.00	✓
Hostess	Wait Staff	Hourly Wage	12.00	

When finished, click the *Save* and *Done* buttons to save the last job title entered and exit the Add Job Title screen.

Job Types

Job Types are defined as the names given to specific categories of tasks that are performed by the employees of the business.

Job titles may be assigned to a multiple job types; therefore, although an employee may have only a single job title, he may have more than one job type.

For example, for the job title “General Manager,” the associated job types might include both Customer Service and Management.

In Job Types, click on the *New* button to display the Job Types [Add New Record] screen. Enter “Customer Service” in the Job Type Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the job type you just entered and begin a new one (See Figure 13-3).

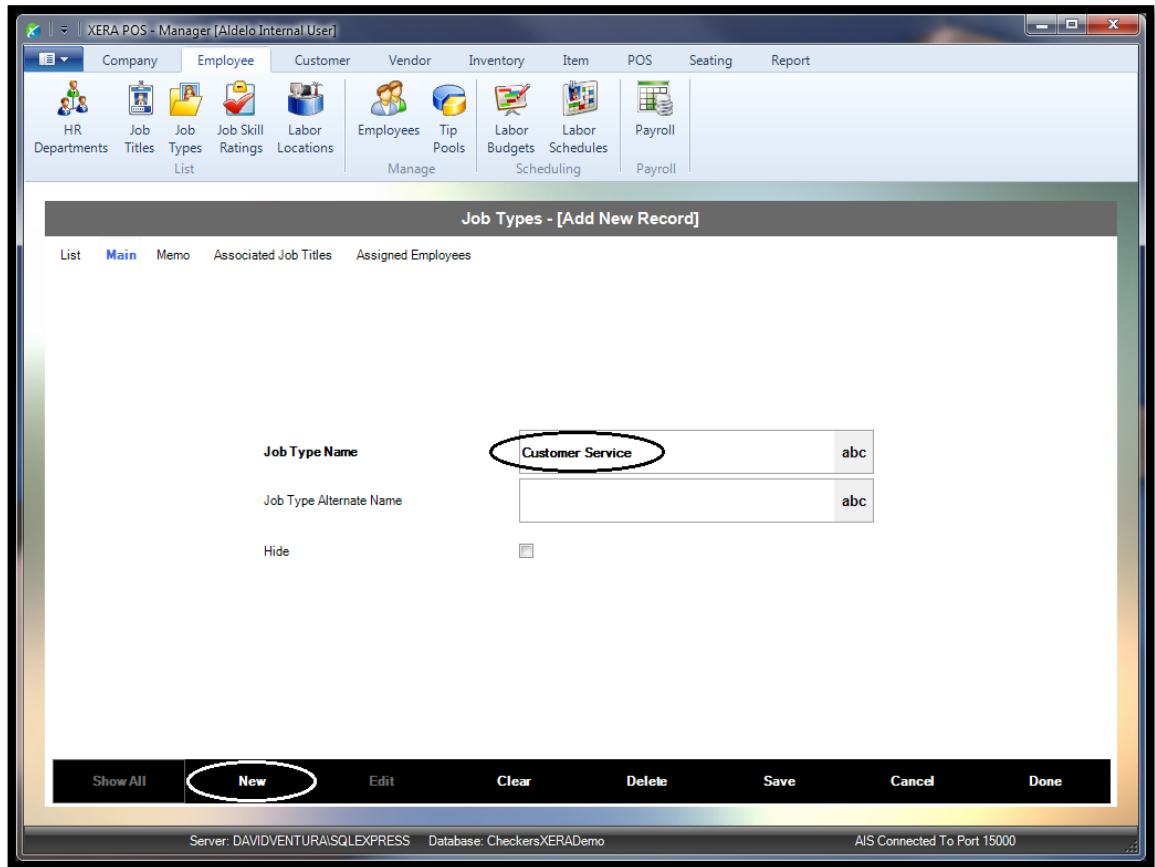


Figure 13-3

Now enter the rest of these job types as listed in the following table:

Job Type Name
Customer Service
Kitchen Staff
Management
Physical Inventory

When finished, click the *Save* button to save the last job type entered.

Now you must associate each job type with one or more job titles. Click on the *List* Tab to display the list of job types you just entered. Select *Customer Service* by double-clicking on it. This displays the Customer Service Job Type under the Main Tab.

Next, click the *Associated Job Titles* Tab. The job type that you are working on appears in the title bar above the tabs. On the left side of the screen, select *Bartender* from the Job Titles List by clicking on it.

Finally, click the *right arrow* button to assign the Bartender job title to the currently selected job type on the right side of the screen. Click the *Save* button when finished (See Figure 13-4).

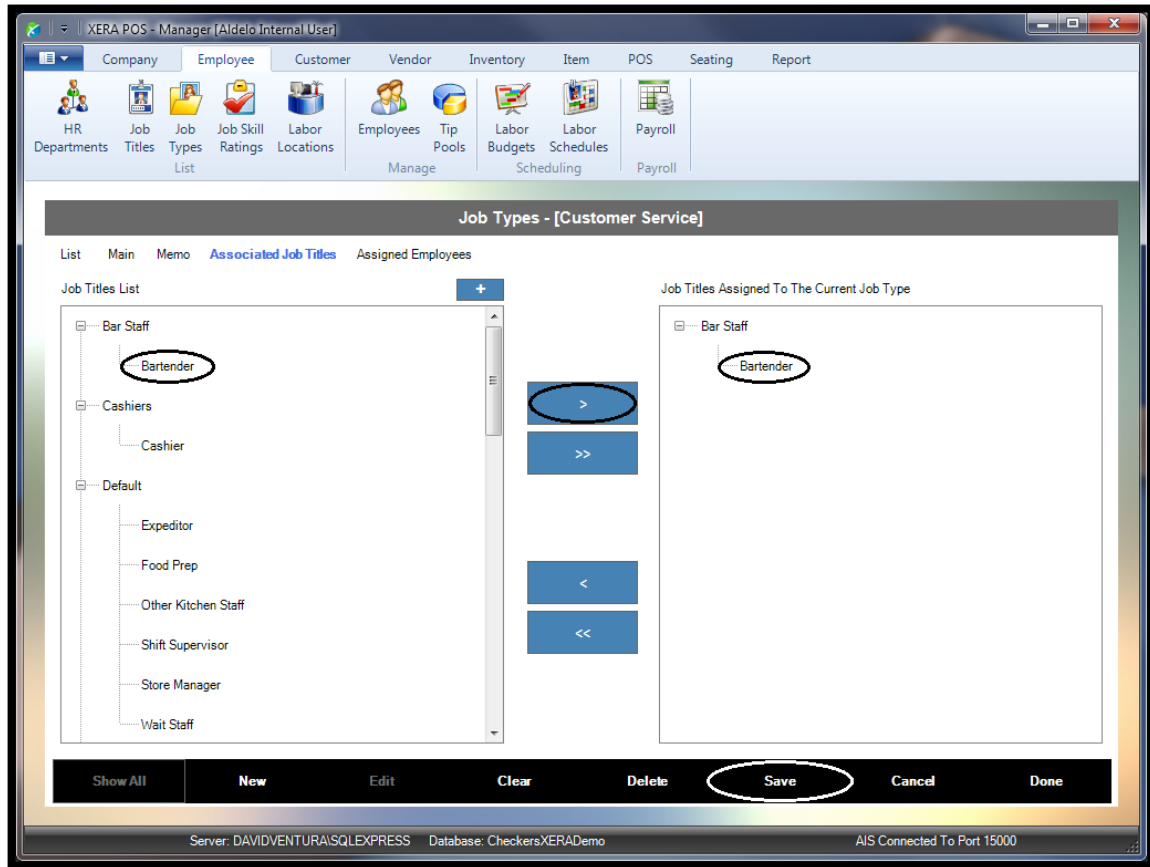


Figure 13-4

Now match the rest of these job types with their associated job titles as listed in the following table:

Job Type Name	Associated Job Titles
Customer Service	Bartender
Customer Service	Cashier
Customer Service	Delivery Driver
Customer Service	General Manager
Customer Service	Bus Person
Customer Service	Hostess
Customer Service	Wait Person
Management	General Manager
Management	Owner
Management	Bartender
Kitchen Staff	Chef
Kitchen Staff	Cook
Kitchen Staff	Dishwasher
Physical Inventory	Bartender
Physical Inventory	Cook
Physical Inventory	Dishwasher
Physical Inventory	Hostess
Physical Inventory	Wait Person

When finished, click the *Save* and *Done* buttons to save the last job title association entered and exit the Add Job Type screen.

Job Skill Ratings

Job Skill Ratings are defined as the levels of performance at which employees execute their jobs. Job skill ratings are created by the management as required.

For example, the manager might create job skill ratings such as “Novice,” “Intermediate,” and “Advanced.” Each employee is assigned a job skill rating for each different job he is capable of performing. Since an employee’s skill at performing his or her job improves with experience, these job skill ratings should be revisited from time to time.

In Job Skill Ratings, click on the *New* button to display the Job Skill Ratings [Add New Record] screen. Enter “Novice” in the Job Skill Rating Name field.

Next, enter “10” in the Sort Order field. The value entered in this field controls the order in which the job skill ratings appear when the list of job skill ratings displays. Numbering in multiples of ten allows the entry of additional job skill ratings between your existing ones in the future without the need to renumber the entire list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the job skill rating you just entered and begin a new one (See Figure 13-5).

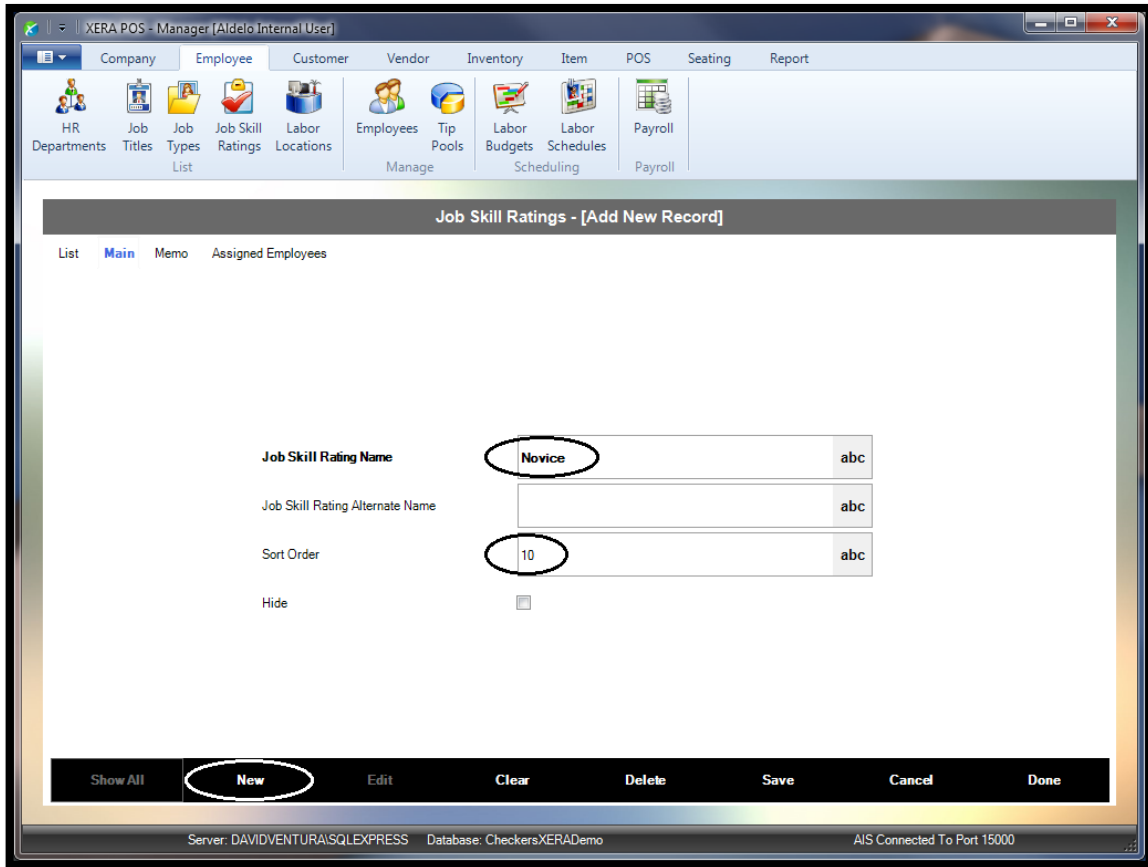


Figure 13-5

Now enter the rest of these job skill ratings as listed in the following table:

Job Skill Rating	Sort Order
Novice	10
Intermediate	20
Advanced	30

When finished, click the *Save* and *Done* buttons to save the last job skill rating entered and exit the Add Job Skill Rating screen.

Labor Locations

Labor locations are defined as the physical areas where the employees perform their work.

For example, in a restaurant, the labor locations might include the main dining room, the patio dining area, the bar, the kitchen, the cashier station, the hostess station, etc. Labor locations are used when creating labor schedules. Labor schedules are covered later in this manual.

In Labor Locations, click on the *New* button to display the Labor Locations [Add New Record] screen. Enter “Main Dining Room” in the Labor Location Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the labor location you just entered and begin a new one (See Figure 13-6).

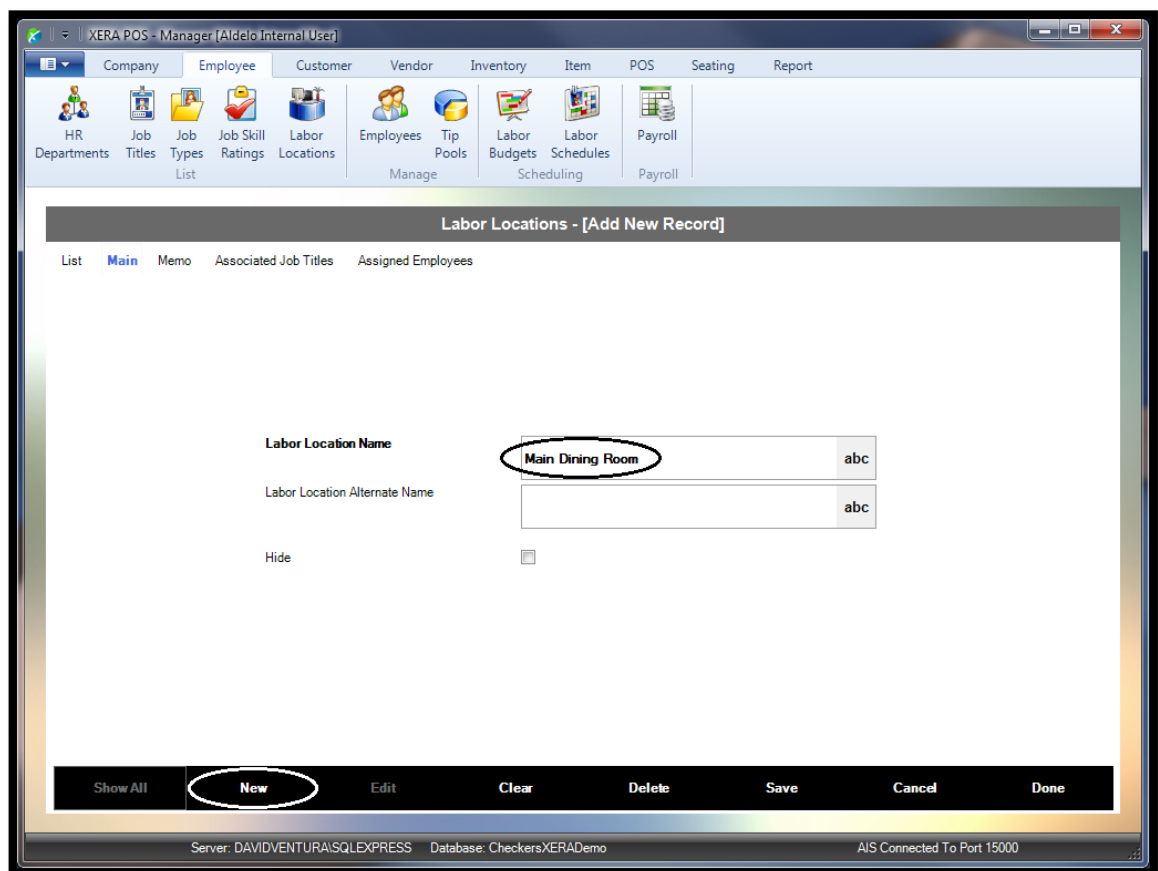


Figure 13-6

Now enter the rest of these labor locations as listed in the following table:

Labor Location Name
Main Dining Room
Patio Dining Area
Bar
Kitchen
Cashier Station
Hostess Station
Delivery Station
Office

When finished, click the *Save* button to save the last labor location entered.

Now you must associate each labor location with one or more job titles.

Click on the *List* Tab to display the list of labor locations you just entered. Select *Bar* by double-clicking on it. This displays the Bar labor location under the Main Tab.

Next, click the *Associated Job Titles* Tab. The labor location that you are working on appears in the title bar above the tabs. On the left side of the screen, select *Bartender* from the Job Titles List by clicking on it.

Finally, click the *right arrow* button to assign the Bartender job title to the currently selected labor location on the right side of the screen. Click the *Save* button when finished (See Figure 13-7).

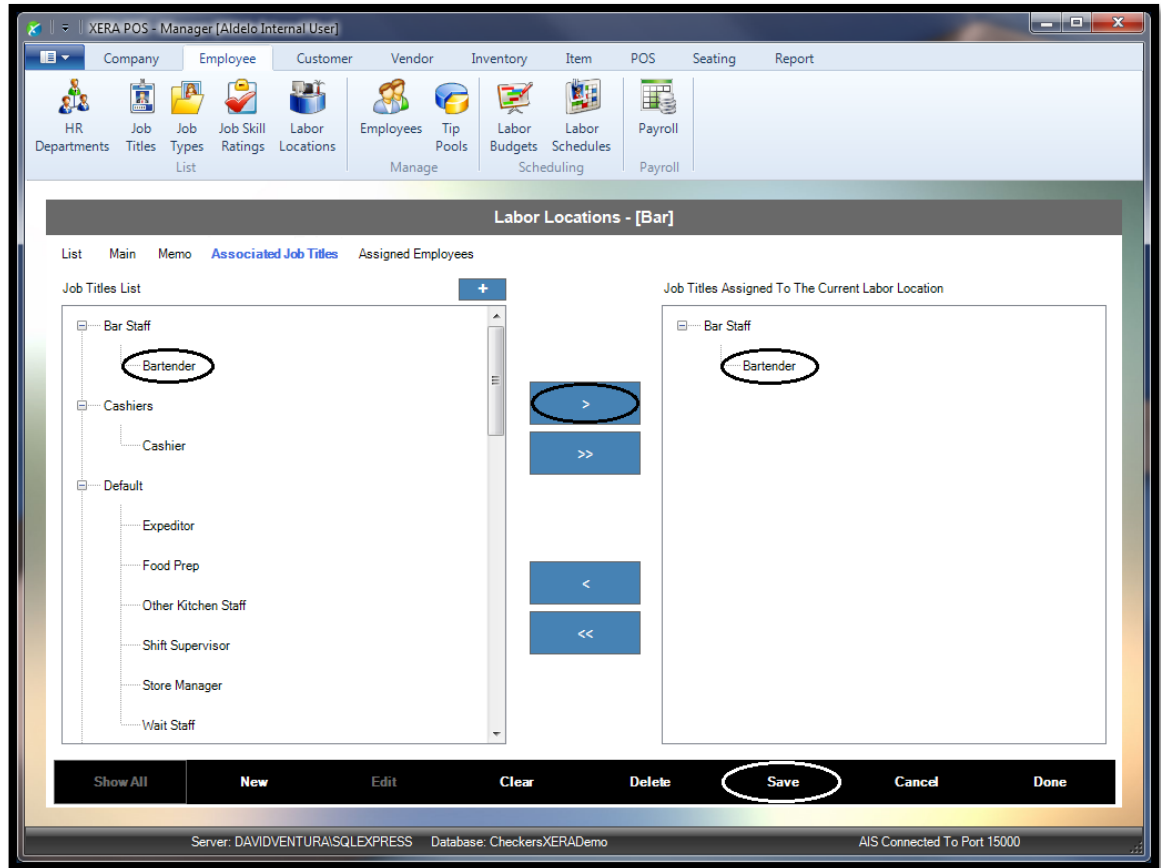


Figure 13-7

Now match the rest of these labor locations with their associated job titles as listed in the following table:

Labor Location Name	Associated Job Titles
Bar	Bartender
Cashier Station	Cashier
Hostess Station	Hostess
Kitchen	Chef
Kitchen	Cook
Kitchen	Dishwasher
Main Dining Room	Wait Person
Main Dining Room	Bus Person
Delivery Station	Delivery Driver
Office	General Manager
Office	Owner
Patio Dining Area	Wait Person
Patio Dining Area	Bus Person

When finished, click the *Save* and *Done* buttons to save the last job title association entered and exit the Labor Location screen.

Chapter 14 — Employee Manage

Employees

Personal and employment information about each of your employees is entered into the Employees feature of XERA® POS. Much of this information is optional at the discretion of the management.

In Employees, click on the *New* button to display the Employees [Add New Record] screen. Enter “George” in the First Name field and “Murphy” in the Last Name field.

Next, click the *down arrow* button to the right of the HR Department field and select *Management* from the list. On the right side of the screen, enter “xxx-xx-xxxx” in the Tax Account Number field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the employee you just entered and begin a new one (See Figure 14-1).

The screenshot displays the 'Employees - [Add New Record]' window in the XERA POS Manager application. The window title is 'XERA POS - Manager [Aldelo Internal User]'. The main menu includes options like Company, Employee, Customer, Vendor, Inventory, Item, POS, Seating, and Report. The 'Employee' menu is active, showing sub-options: HR Departments, Job Titles, Job Types List, Job Skill Ratings, Labor Locations, Employees Manage, Tip Pools, Labor Budgets, Labor Schedules, and Payroll. The form itself has tabs for List, Main (selected), Memo, Availability, Assigned Jobs, Login Accounts, Time Cards, and Payroll History. The 'Main' tab contains two columns of input fields. The left column includes: First Name (George), Middle Initial (abc), Last Name (Murphy), HR Department (Management), Address 1 (abc), Address 2 (abc), and Postal Code (abc). The right column includes: Tax Account Number (xxx-xx-xxxx), Birth Date, Employee Picture Name, Driver License Number (abc), Driver License Expire Date, and User Interface Language. At the bottom of the form are buttons for Show All, New, Edit, Clear, Delete, Save, Cancel, and Done. The 'New' button is circled in red. The status bar at the bottom shows 'Server: DAVIDVENTURA/SQL EXPRESS Database: CheckersXERADemo AIS Connected To Port 15000'.

Figure 14-1

Now enter the rest of these employees as listed in the following table:

First Name	Last Name	HR Department	Tax Account Number
George	Murphy	Management	xxx-xx-xxxx
Frederick	Austerlitz	Wait Staff	xxx-xx-xxxx
James	Beard	Kitchen Staff	xxx-xx-xxxx
Joan	Brodel	Cashiers	xxx-xx-xxxx
Foster	Brooks	Bar Staff	xxx-xx-xxxx
Johnnie	Collier	Kitchen Staff	xxx-xx-xxxx
Frances	Gumm	Wait Staff	xxx-xx-xxxx
Robert	Johnson	Delivery Drivers	xxx-xx-xxxx
Eugene	Kelly	Management	xxx-xx-xxxx
Thomas	Mapother	Bar Staff	xxx-xx-xxxx
Virginia	McMath	Wait Staff	xxx-xx-xxxx
Julia	McWilliams	Kitchen Staff	xxx-xx-xxxx
Harold	Nicholas	Wait Staff	xxx-xx-xxxx
Eleanor	Powell	Wait Staff	xxx-xx-xxxx
Jeff	Smith	Kitchen Staff	xxx-xx-xxxx
Dave	Ventura	Management	xxx-xx-xxxx
William	Yarborough	Delivery Drivers	xxx-xx-xxxx

When finished, click the *Save* button to save the last employee entered.

(Please note that to perform one of the following steps, the Routing Definitions feature under the POS Tab must be setup in advance. The setup of Routing Definitions is covered later in this manual.)

Next, click on the *List* Tab to display the list of employees you just entered and double-click on *George Murphy* to display his record under the Main Tab. Click the *Assigned Jobs* Tab and then click the *New Job* button. Under the Assigned Job Details column, click the *down arrow* button to the right of the Job Title field and select *Owner* from the list. Click the *down arrow* button to the right of the Job Skill Rating field and select *Advanced* from the list. Click the *down arrow* button to the right of the User Routing field and select *None* from the list.

The rest of the required information for this assigned job (in the fields with the caption labels in **bold** text) is entered automatically, based upon the information that was entered when the job was created in the system; however, this information may be overridden as necessary.

For our training purposes, we will select the *Do Not Enforce Work Schedule* checkbox but will leave the rest of the settings at their default values.

When finished, click the *Save Job* button to save the job assignment for this employee to the Assigned Jobs List on the left side of the screen (See Figure 14-2).

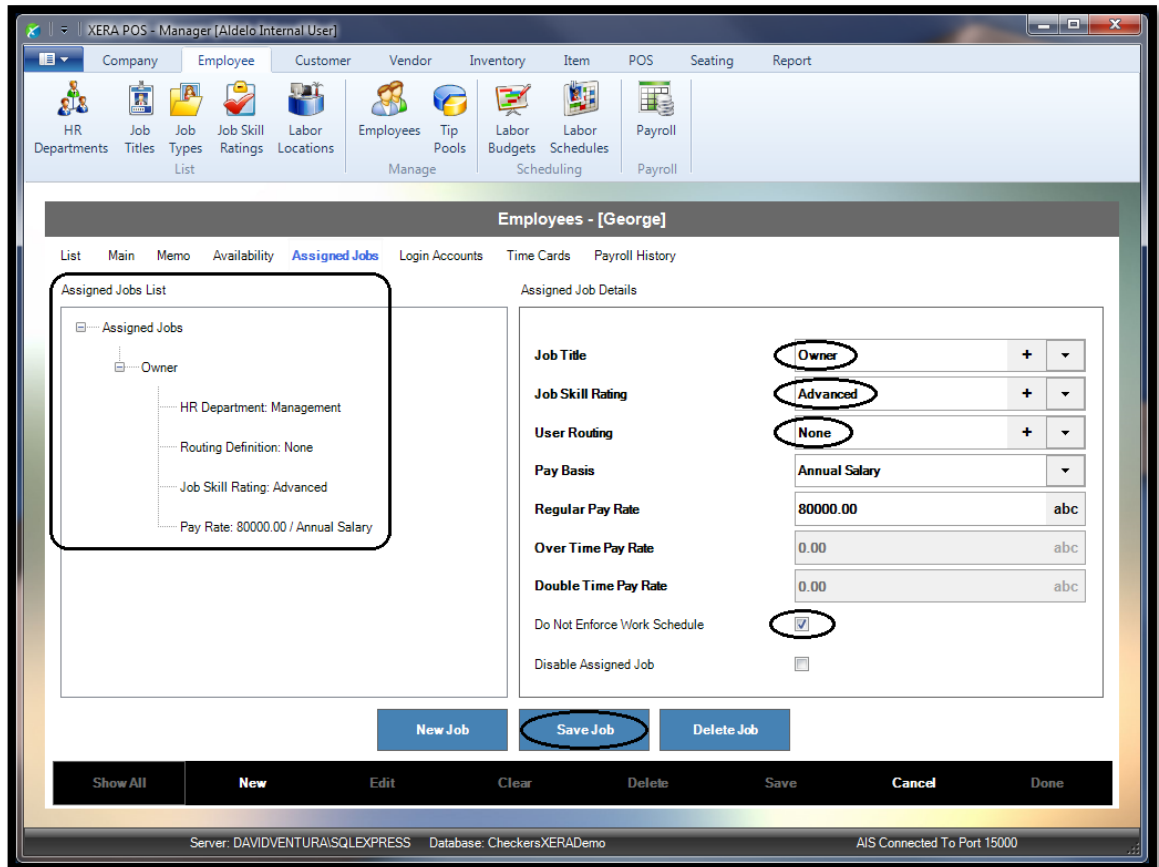


Figure 14-2

Now enter the rest of these employee job assignments as listed in the following table:

First Name	Last Name	Job Title	Job Skill Rating	User Routing	Do Not Enforce Work Schedule
George	Murphy	Owner	Advanced	None	✓
Frederick	Austerlitz	Bus Person	Advanced	None	✓
James	Beard	Chef	Advanced	None	✓
Joan	Brodel	Cashier	Intermediate	None	✓
Foster	Brooks	Bartender	Advanced	Bar	✓
Johnnie	Collier	Dishwasher	Novice	None	✓
Frances	Gumm	Hostess	Intermediate	Kitchen Station 1	✓
Robert	Johnson	Delivery Driver	Advanced	None	✓
Eugene	Kelly	General Manager	Intermediate	Kitchen Station 2	✓
Thomas	Mapother	Bartender	Novice	Bar	✓
Virginia	McMath	Wait Person	Intermediate	Kitchen Station 1	✓
Julia	McWilliams	Cook	Intermediate	None	✓
Harold	Nicholas	Bus Person	Novice	None	✓
Eleanor	Powell	Wait Person	Advanced	Kitchen Station 1	✓
Jeff	Smith	Cook	Novice	None	✓
Dave	Ventura	Owner	Advanced	None	✓
William	Yarborough	Delivery Driver	Intermediate	None	✓

When finished, click the *Save Job* button to save the last employee job assignment entered.

Now select the *List* Tab and double-click on *Eleanor Powell* to display her employee record under the Main Tab.

Next, click on the *Login Accounts* Tab and then click the *New Login* button near the bottom of the screen. Here you create login accounts for your employees.

For our training purposes, we will only enter information in the required fields (those whose fields are labeled in **bold** text).

The Entry Date/Time field is populated automatically with the current date and time. Under the User Name field, enter “Eleanor.” This is the name of the user as you wish it to appear on customer receipts, reports, etc. Under the Password field, enter “222.” Enter the same password in the Confirm Password field. This is the password that the employee will use to login to the system.

Finally, from the Security Role dropdown list, select *Wait Staff*, as this is the security role that will be associated with this login account.

When finished, click the *Save Login* button to save the employee's login information (See Figure 14-3).

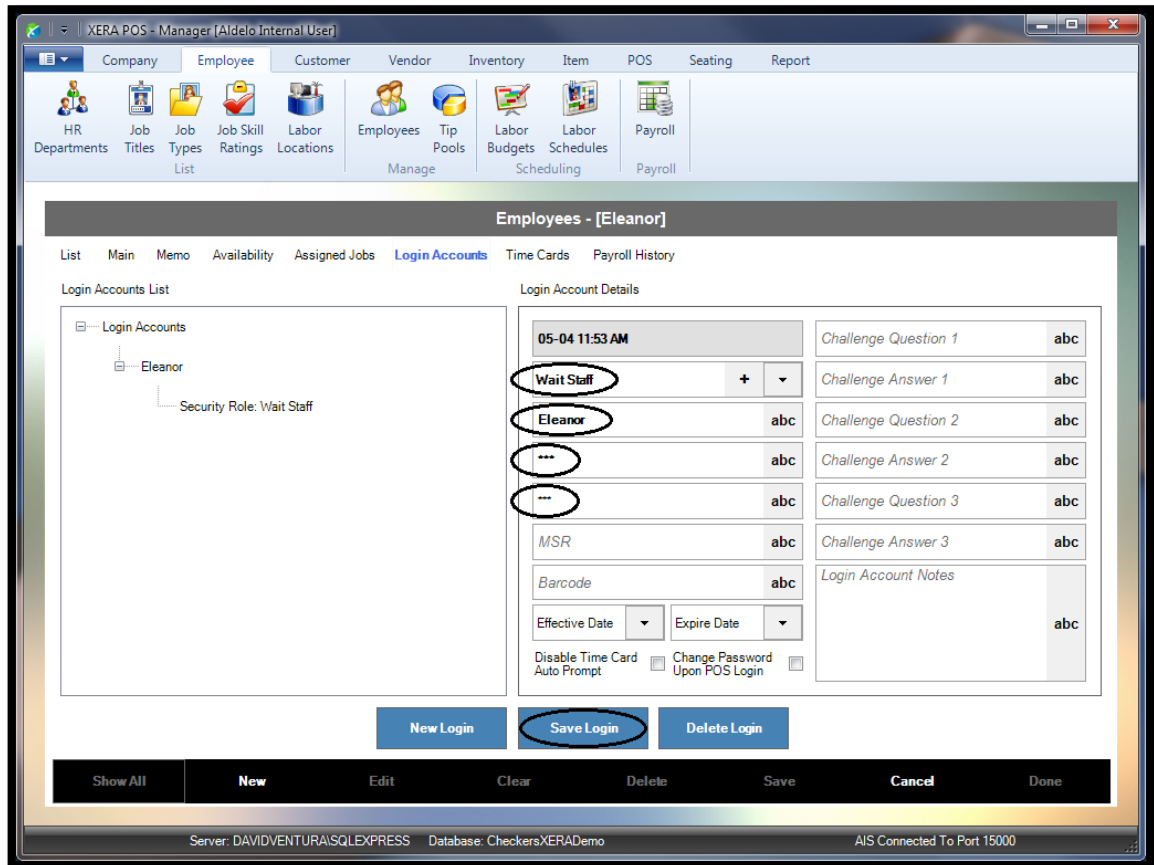


Figure 14-3

Please note that a login account may be created with an effective date, an expiration date, or both. To do so, click the *down arrow* button to the right of the respective date field and select the desired date from the graphical calendar display by clicking directly on it. Use the *right arrow* and *left arrow* buttons at the top of the calendar graphic to scroll through the months.

Once an employee logs into the system, he is prompted to clock in by default. To disable this behavior for this specific employee, select the *Disable Time Card Auto Prompt* checkbox near the bottom of the screen. When this checkbox is selected, the employee is not prompted to clock in upon logging into the system.

Selecting the *Change Password Upon POS Login* checkbox requires the employee to change the password that was assigned by the manager the first time the employee logs into the system. Use of this feature prevents the manager from knowing the employee's password. If the employee forgets his password, the manager must delete the login account and create a new one for the employee.

If your employees use MSR cards or barcodes to login to the system, enter the MSR track data or the barcode information in the appropriate fields. This data must be entered into the respective fields manually.

The challenge questions and answers feature allows the employee to create three questions to which he knows the answers. This information is used if the employee forgets his password. The employee is prompted to answer each of the challenge questions in succession until all three answers have been entered successfully. At this point, the employee is prompted to change his current password to a new one.

Now enter the rest of this employee login account information as listed in the following table:

First Name	Last Name	User Name	Password	Confirm Password	Security Role
Dave	Ventura	Dave	111	111	Owner
Eleanor	Powell	Eleanor	222	222	Wait Staff
Eugene	Kelly	Eugene	333	333	Manager
Foster	Brooks	Foster	444	444	Bar Staff
Frances	Gumm	Frances	555	555	Hostess
Frederick	Austerlitz	Frederick	666	666	Bus Staff
George	Murphy	George	777	777	Owner
Harold	Nicholas	Harold	888	888	Bus Staff
James	Beard	James	999	999	Kitchen Staff
Jeff	Smith	Jeff	012	012	Kitchen Staff
Joan	Brodel	Joan	123	123	Cashier
Johnnie	Collier	Johnnie	234	234	Kitchen Staff
Julia	McWilliams	Julia	345	345	Kitchen Staff
Robert	Johnson	Robert	456	456	Delivery Driver
Thomas	Mapother	Thomas	567	567	Bar Staff
Virginia	McMath	Virginia	678	678	Wait Staff
William	Yarborough	William	789	789	Delivery Driver

For our training purposes, we will leave the settings under the rest of the tabs of the Employees screen at their default values. Click the *Cancel* button to exit the Employees screen.

Tip Pools

The Tip Pools feature allows the consolidation of some or all of the gratuities received by some or all employees for redistribution to those employees who are members of the tip pool recipients group. The gratuities are allocated to these employees in predefined percentages.

In Tip Pools, click on the *New* button to display the Tip Pools – [Add New Record] screen. Enter “Bus Staff” in the Tip Pool Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the tip pool you just entered and begin a new one (See Figure 14-4).

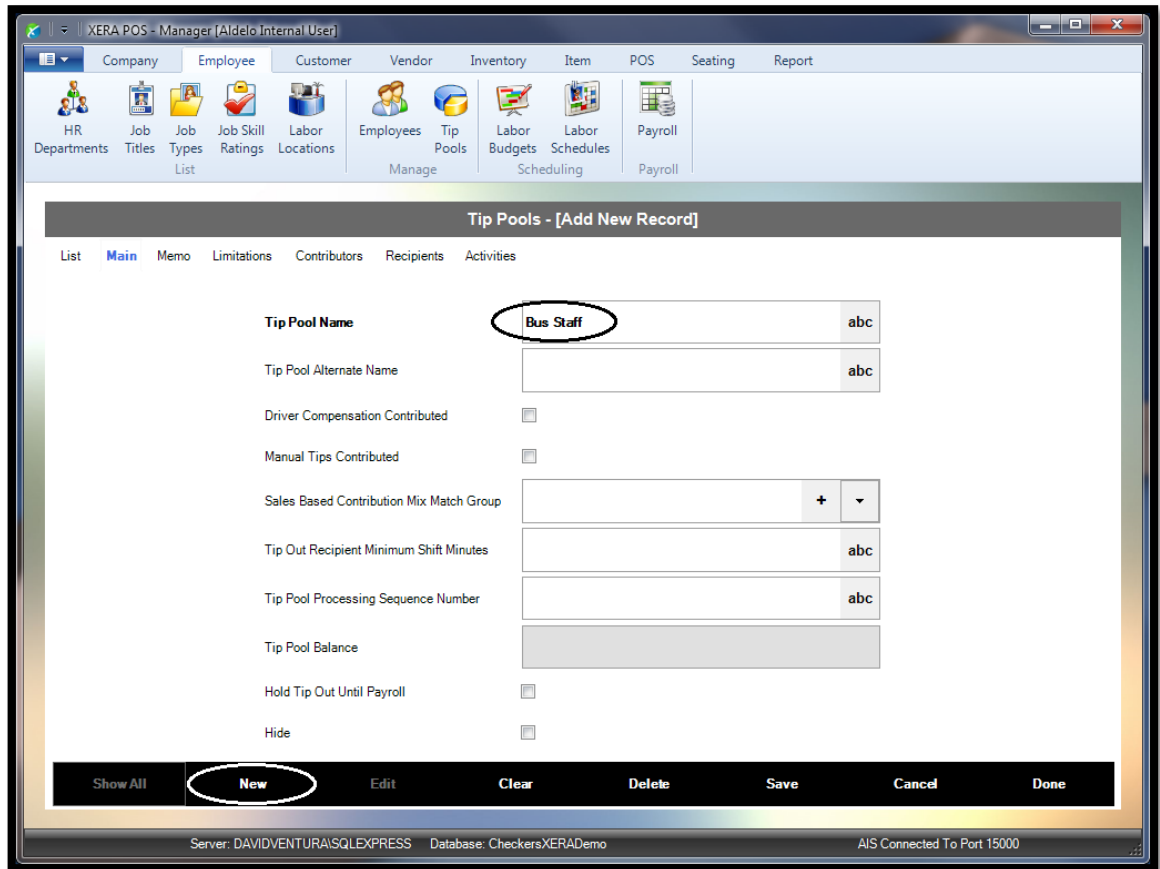


Figure 14-4

Now enter the rest of these tip pools as listed in the following table:

Tip Pool Name
Bus Staff
Kitchen Staff
Cashiers

When finished, click the *Save* button to save the last tip pool entered.

(Please note that to perform the following step, the Seating Groups feature under the Seating Tab must be setup in advance. The setup of Seating Groups is covered later in this manual.)

Next, click the *List* Tab to display the list of tip pools that you just created. Double-click on *Bus Staff* to display the Bus Staff tip pool under the Main Tab. Now click on the *Limitations* Tab.

Under the Order Type Limitations group box, select the *Dine In* checkbox and under the Table Group Limitations group box, select the *Main Dining Room* and *Patio Dining Area* checkboxes.

For our training purposes, we will leave the rest of the settings under the Limitations Tab at their default values.

When finished, click the *Save* button to save your changes to the limitations of the bus staff tip pool (see Figure 14-5).

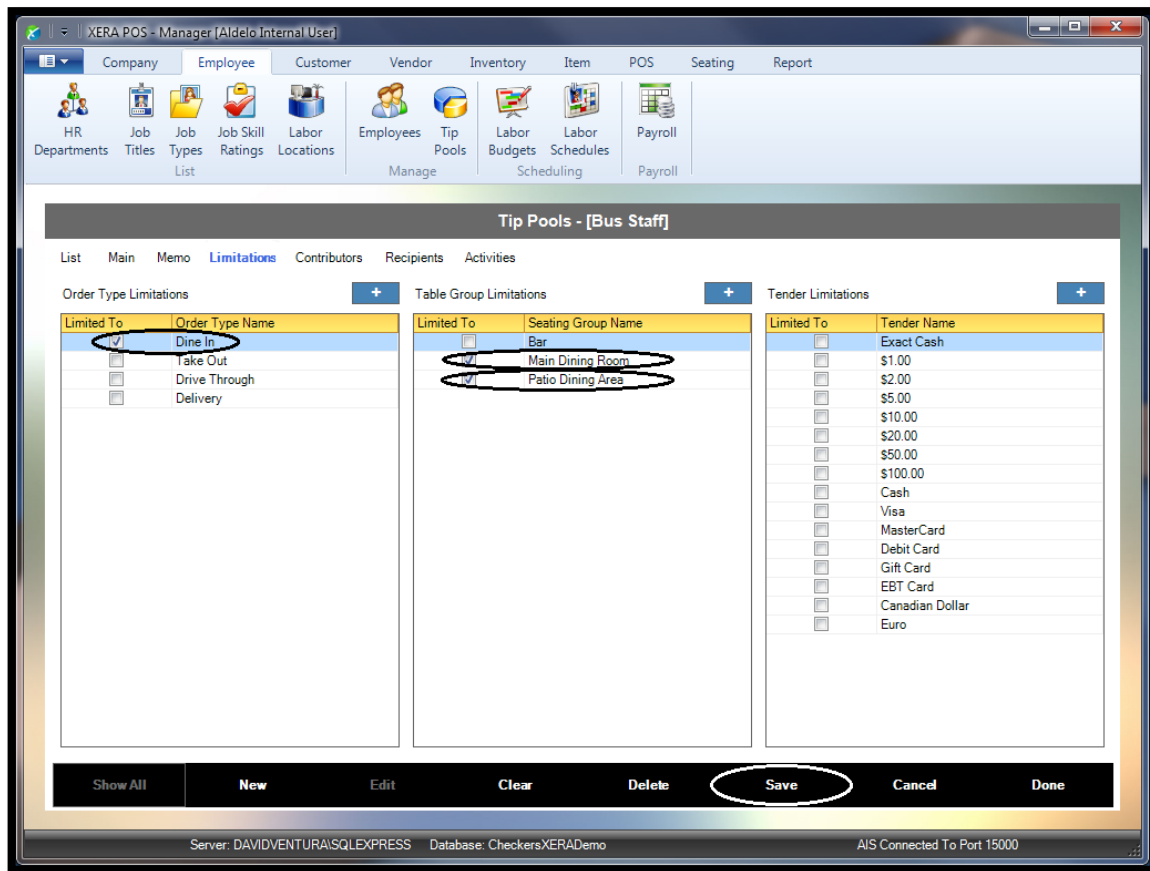


Figure 14-5

Now enter the limitations for the rest of these tip pools as listed in the following table:

Tip Pool Name	Order Type Limitations	Table Group Limitations
Bus Staff	Dine In	Main Dining Room Patio Dining Area
Kitchen Staff	Dine In	Main Dining Room Patio Dining Area
Cashiers	Dine In	Main Dining Room Patio Dining Area

When finished, click the *Save* button to save the limitations entered for the last tip pool.

Next, click the *List* Tab to display the list of tip pools again. Double-click on *Bus Staff* to display the Bus Staff tip pool under the Main Tab.

Now click on the *Contributors* Tab. Under the Tip Pool Contributors List group box, select *Eleanor Powell*. Under the Tip Pool Contributor Details group box, click the *down arrow* button to the right of the Tip Contribution Source field and select *From Gratuities* from the list. Now enter “15” in the Tip Contribution Percent field.

For out training purposes, we will leave the remaining fields at their default values.

Click the *Save Details* button to save the contributor details information (See Figure 14-6).

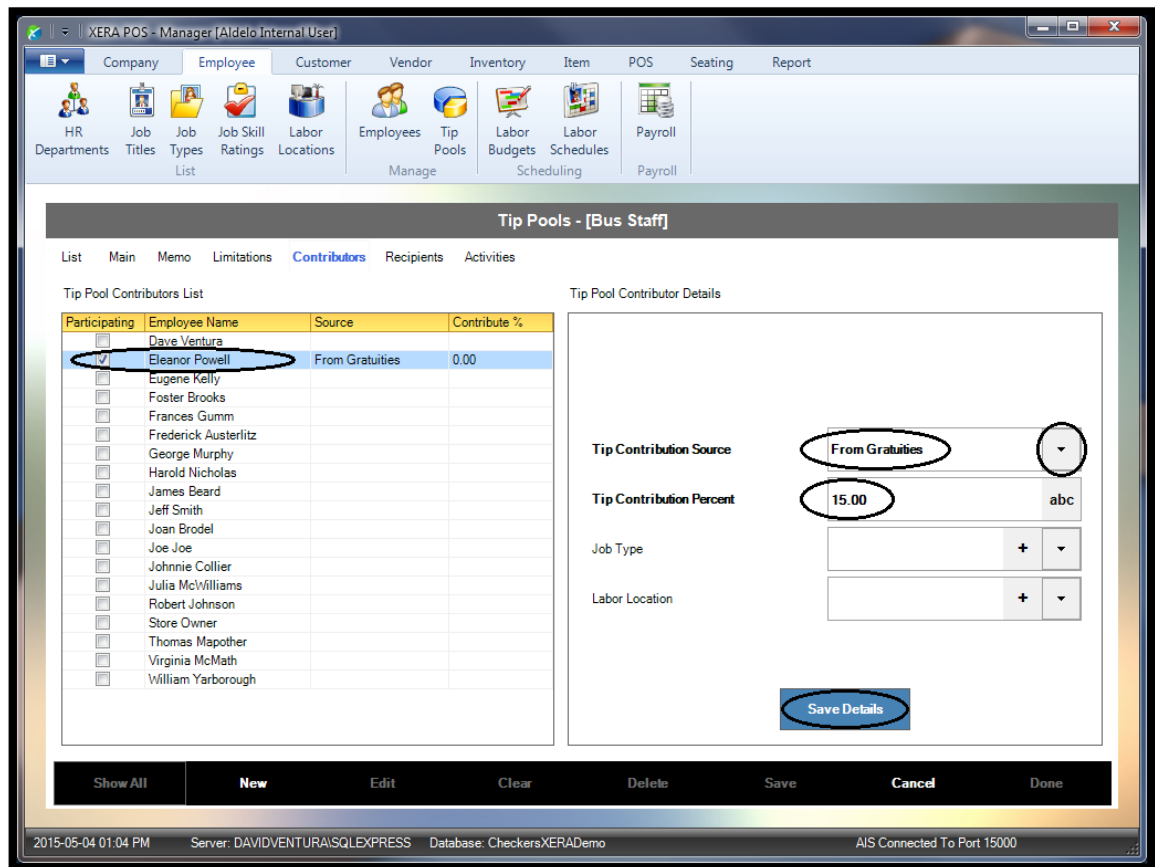


Figure 14-6

Now select *Virginia McMath* from the Tip Pool Contributors List and repeat the same procedure as described above. Be sure to click the *Save Details* button when finished.

Next, click the *List* Tab to display the list of tip pools again. Double-click on *Bus Staff* to display the Bus Staff tip pool under the Main Tab.

Now click on the *Recipients* Tab. Under the Tip Pool Recipients List group box, select *Frederick Austerlitz*.

For our training purposes, we will leave the remaining fields at their default values.

Click the *Save Details* button to save the recipient details (See Figure 14-7).

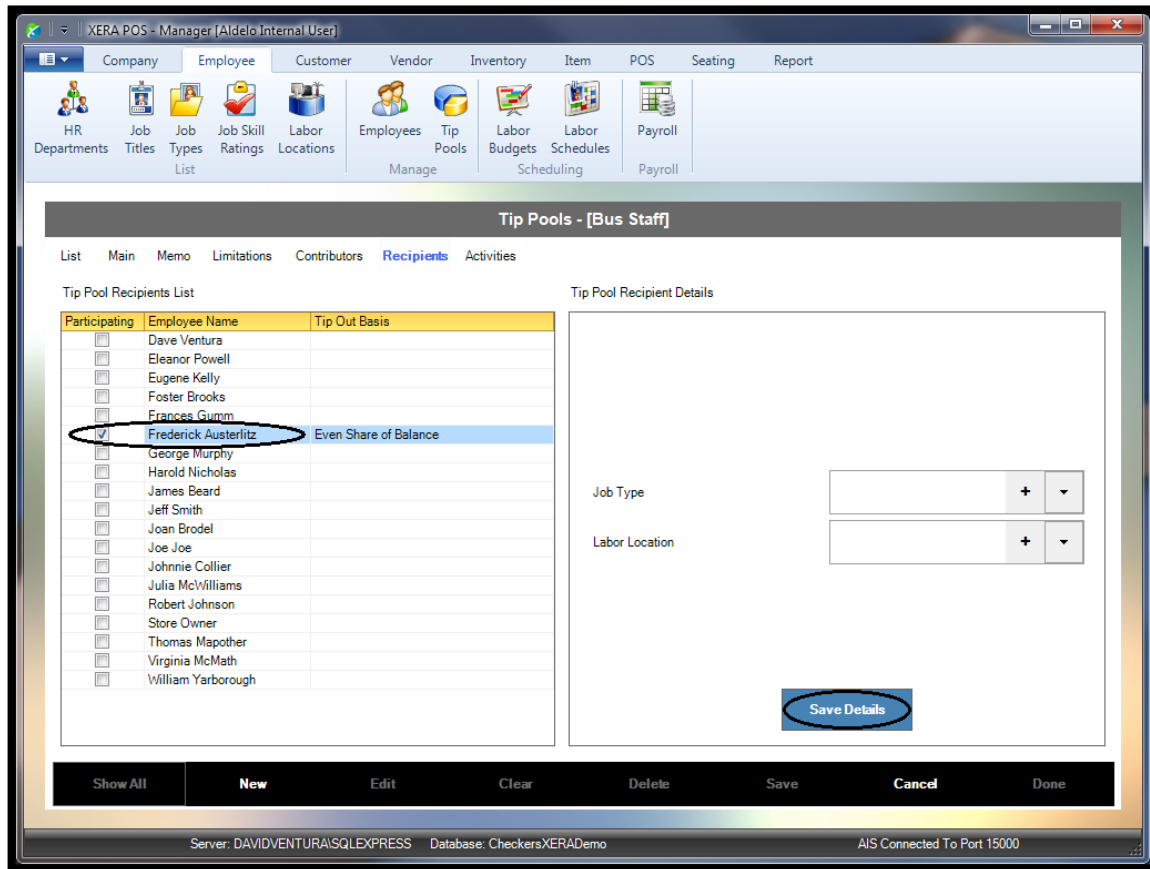


Figure 14-7

Now select *Harold Nicholas* from the Tip Pool Recipients List and repeat the same procedure as described above. Be sure to click the *Save Details* button when finished.

Next, configure the rest of this tip pool contributor information as listed in the following table:

Tip Pool Name	Contributors	Tip Contribution Source	Tip Contribution Percent
Bus Staff	Eleanor Powell	From Gratuities	15.00
	Virginia McMath	From Gratuities	15.00
Kitchen Staff	Eleanor Powell	From Gratuities	15.00
	Virginia McMath	From Gratuities	15.00
Cashiers	Eleanor Powell	From Gratuities	7.50
	Virginia McMath	From Gratuities	7.50

Finally, configure the rest of this tip pool recipient information as listed in the following table:

Tip Pool Name	Recipients	Job Type	Labor Location
Bus Staff	Frederick Austerlitz	-	-
	Harold Nicholas	-	-
Kitchen Staff	Julia McWilliams	-	-
	Jeff Smith	-	-
Cashiers	Joan Brodel	-	-

When you finish entering all of the information, click the *Cancel* button to exit the Tip Pools screen.

Chapter 15 — Employee Scheduling

Labor Budgets

The Labor Budgets feature of XERA® POS allows the manager to create a budget of the labor hours that are needed for each of the days of the work week. Once the budget is complete, available employees are matched to the days and times when their services are needed. Additional labor budgets may be created for work weeks that have different labor requirements.

In Labor Budgets, click on the *New* button to display the Labor Budgets – [Add New Record] screen. Enter “Normal Labor Budget” in the Labor Budget Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When you are finished, click the *Save* button to save the labor budget you just created (See Figure 15-1).

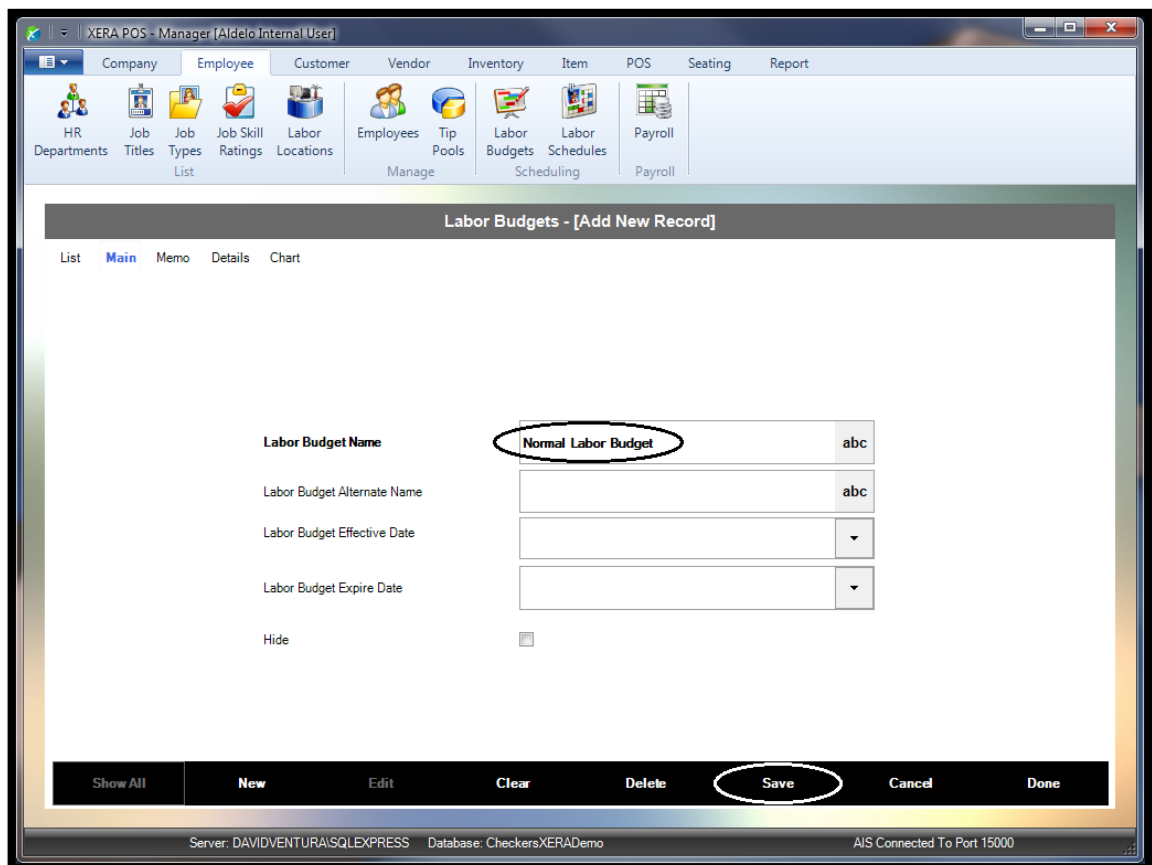


Figure 15-1

Next, click on the *Details* Tab and then click the *New Entry* button near the bottom of the screen. Click the *down arrow* button to the right of the Location field and select *Cashier Station* from the displayed list. In the Job Title field, select *Cashier*; in the Skill Rating field, select *Novice*; in the Day of Week field, select *Monday*.

Next, enter the work schedule for this shift. In the Clock In/Clock Out Time fields, enter “11:00 AM” in the top field and “8:00 PM” in the bottom field. In the Break 1 Begin/End Time fields, enter 1:00 PM and 1:10 PM, respectively.

In the Lunch Begin/End Time field, enter 3:00 PM and 4:00 PM, respectively. Please note that the lunch break is entered near the bottom of the Labor Budget Entry Details group box; do not enter the lunch period as a break.

Finally, in the Break 2 Begin/End Time fields, enter 6:00 PM and 6:10 PM, respectively.

For our training purposes, we will leave the rest of the settings at their default values. Please note that the *Comp* checkboxes to the right of each break period entry field indicate whether the employee receives pay while on the work break. Typically, break periods are compensated while lunch periods are not.

The total shift hours display at the bottom of the Labor Budget Entry Details group box. If the total hours are not as expected, recheck your entries.

When you finish entering the labor budget shift, click the *Save Entry* button to display it in the Labor Budget Entries List on the left side of the screen.

Now enter the rest of these labor budgets as listed in the following table:

Location	Job Title	Skill Rating	Day of Week	Clock In/Clock Out Time		Break 1 Begin/End Time		Break 2 Begin/End Time		Lunch Begin/End Time	
Cashier Station	Cashier	Novice	Monday	11:00AM	08:00 PM	01:00 PM	01:10 PM	06:00 PM	06:10 PM	03:00 PM	04:00 PM
Main Dining Room	Wait Person	Intermediate	Monday	11:00AM	08:00 PM	01:00 PM	01:10 PM	06:00 PM	06:10 PM	03:00 PM	04:00 PM
Main Dining Room	Wait Person	Intermediate	Monday	11:00AM	08:00 PM	01:15 PM	01:25 PM	06:15 PM	06:25 PM	04:00 PM	05:00 PM
Kitchen	Chef	Advanced	Monday	11:00AM	08:00 PM	01:00 PM	01:10 PM	06:00 PM	06:10 PM	03:00 PM	04:00 PM
Kitchen	Cook	Novice	Monday	11:00AM	08:00 PM	01:15 PM	01:25 PM	06:15 PM	06:25 PM	04:00 PM	05:00 PM
Bar	Bartender	Intermediate	Monday	11:00AM	08:00 PM	01:00 PM	01:10 PM	06:00 PM	06:10 PM	03:00 PM	04:00 PM
Hostess Station	Hostess	Novice	Monday	11:00AM	08:00 PM	01:00 PM	01:10 PM	06:00 PM	06:10 PM	03:00 PM	04:00 PM

If you wish to create a new labor budget that is substantially the same as an existing labor budget, a labor budget entry may be copied by first clicking on it under the Location column in the Labor Budget Entries List group box on the left side of the screen and then clicking the *Copy Entry* button. Make any necessary changes to the copied labor budget to make it unique and then click the *Save Entry* button to save the new labor budget entry.

To delete an existing labor budget entry, select it under the Location column by clicking on it and then click the *Delete Entry* button.

After completion of all of the necessary labor budget entries, click on the Chart Tab to view a timeline style graphical representation of the labor budget (a Gantt chart).

The chart displays the time across the horizontal axis and the labor budgets down the vertical axis. The labor budgets include the shift beginning and ending times plus the beginning and ending times of the break periods and the lunch period.

Select the desired labor location from the dropdown list at the top left of the chart, select the desired job title from the dropdown list in the middle, and select the day of the week from the dropdown list at the top right of the chart. When selecting the desired job title, selection of the blank entry at the top of the dropdown list displays all job titles assigned to the selected labor location (See Figure 15-2).

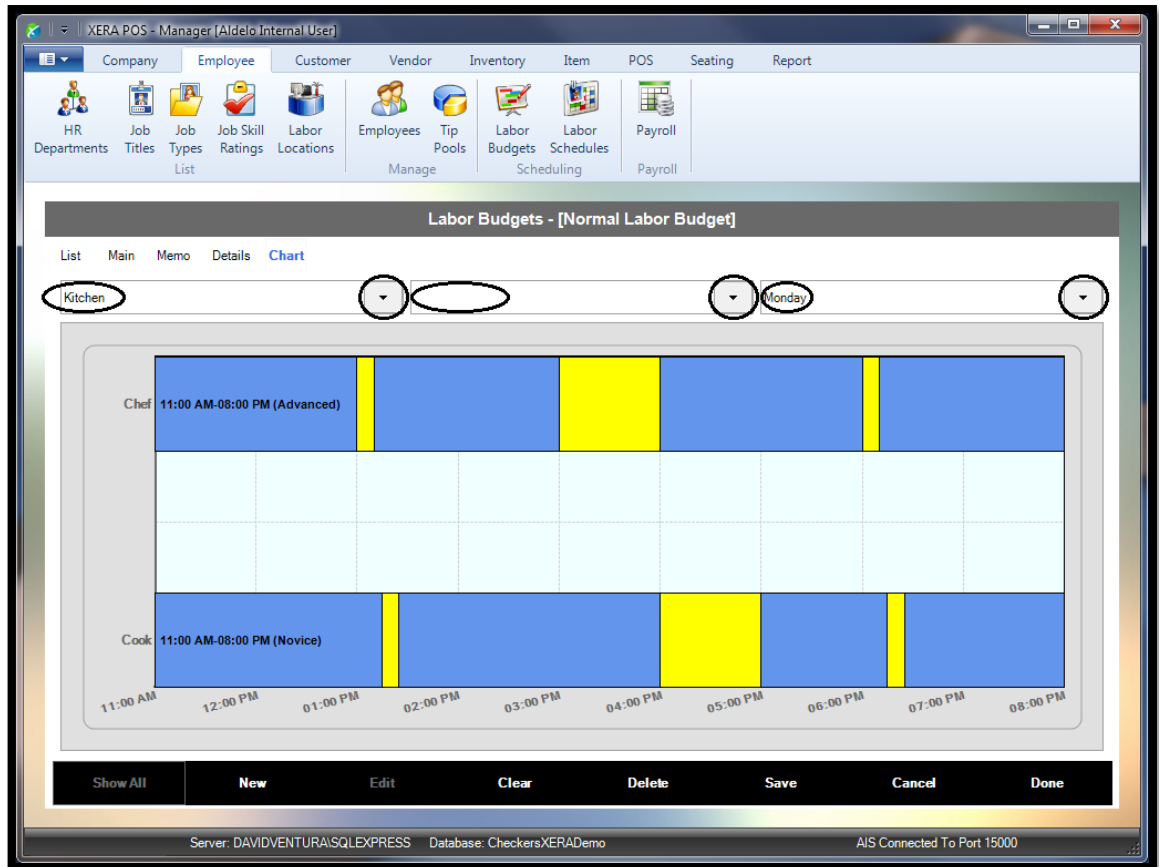


Figure 15-2

For our training purposes, we will create a labor budget for a single day. Click the *Save* and *Done* buttons at the bottom of the screen to save your labor budget and exit the Labor Budgets screen.

Labor Schedules

The labor schedule is created by assigning qualified employees to fill the requirements of the labor budget.

In Labor Schedules, click on the *Scheduling* Tab to display the Labor Scheduling screen. At the top of the left half of the screen, there are three dropdown list boxes. In the leftmost list box, click the *down arrow* button and then select *Normal Labor Budget* by clicking on it. In the center list box, select *Bar*. In the right list box, select *Monday*.

On the right half of the top of the Scheduling Tab, enter the New Schedule Begin & End Dates. For our training purposes, select the next Monday for both the beginning and ending dates for the schedule. Please note that the dates may be entered by clicking the *down arrow* button to the right of each dropdown list to display a graphical calendar control and then clicking directly on the desired date. If necessary, scroll the calendar forward or backward by using the *left arrow* and *right arrow* buttons at the top of the calendar control. In your own application, enter the beginning and ending dates of the workweek you are scheduling.

To assign a bartender to the budgeted shift, click the *Assign* button. Since our labor budget calls for a bartender with an intermediate job skill rating, no match is found because neither of our bartenders is rated as intermediate. In this case, the Assign Available Employee screen displays an *All Qualified Employees* button. Click this button to display a list of all of your employees who are qualified to perform as a bartender.

A button displays for each qualified employee. Click the *Foster Brooks Bartender* button to assign him to the work shift.

The display returns to the Scheduling Tab. Here you can see that Foster Brooks has been assigned to the work shift under the Employee column (See Figure 15-3).

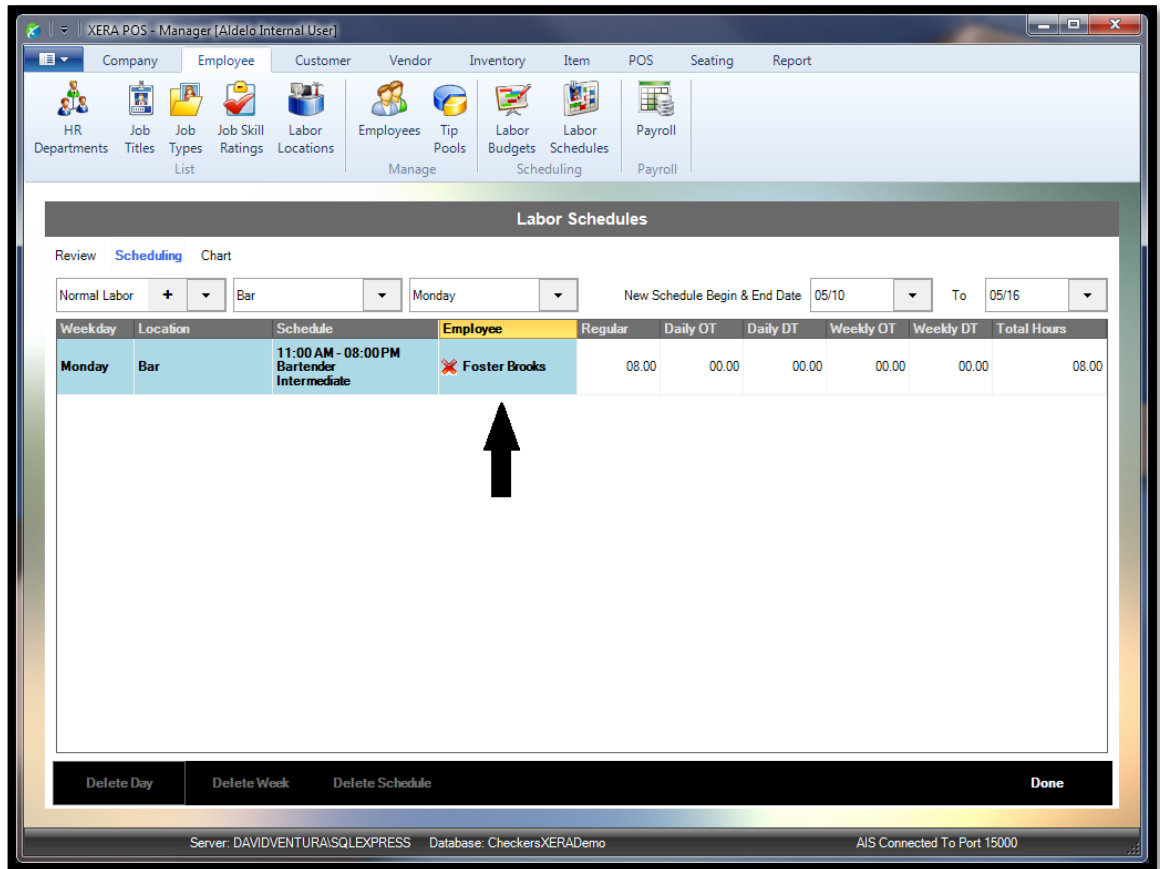


Figure 15-3

Now assign employees to cover the rest of the work shifts under the normal labor budget as listed in the following table:

Labor Budget	Labor Location	Day of Week	Job	Skill Level	Employee Name
Normal Labor Budget	Bar	Monday	Bartender	Intermediate	Foster Brooks
Normal Labor Budget	Cashier Station	Monday	Cashier	Novice	Joan Brodel
Normal Labor Budget	Main Dining Room	Monday	Wait Person	Intermediate	Virginia McMath
Normal Labor Budget	Main Dining Room	Monday	Wait Person	Intermediate	Eleanor Powell
Normal Labor Budget	Kitchen	Monday	Chef	Advanced	James Beard
Normal Labor Budget	Kitchen	Monday	Cook	Novice	Julia McWilliams
Normal Labor Budget	Hostess Station	Monday	Hostess	Novice	Frances Gumm

When finished, click the *down arrow* button to the right of the center drop down list box on the left side of the Scheduling Tab screen and select the *blank* option from the top of the list. This displays the labor schedules for all of the labor locations that you just assigned to your employees.

When finished viewing the labor schedules, click the *Done* button to exit the Labor Schedules screen (see Figure 15-4).

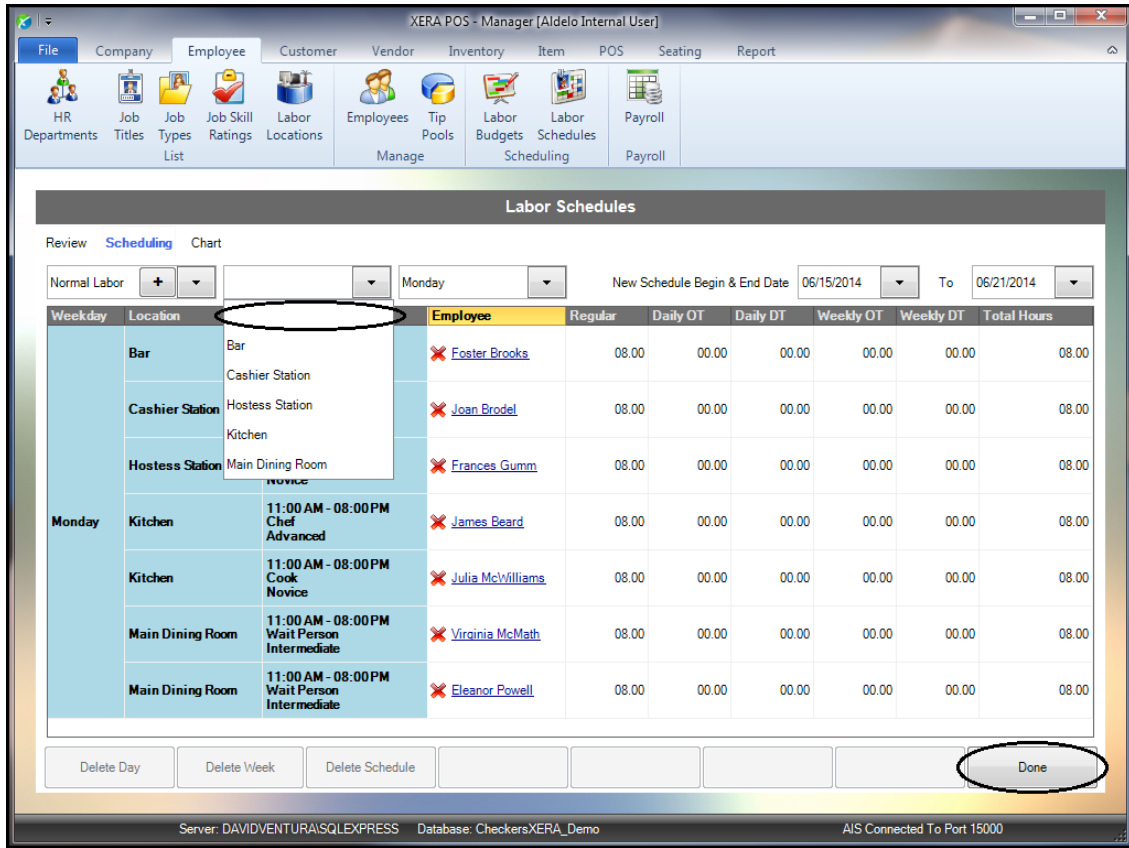


Figure 15-4

Chapter 16 — Employee Payroll

Payroll

The Payroll feature of XERA® POS allows the manager to process the employee payroll for the selected pay period. Once the payroll processing is complete, a payroll report may be generated that shows the pay rate, credited hours, and pretax earnings for each employee.

In the XERA® POS Manager application, navigate to **Employee Tab > Payroll > Payroll** to display the Payroll screen and access the payroll features (See Figure 16-1).

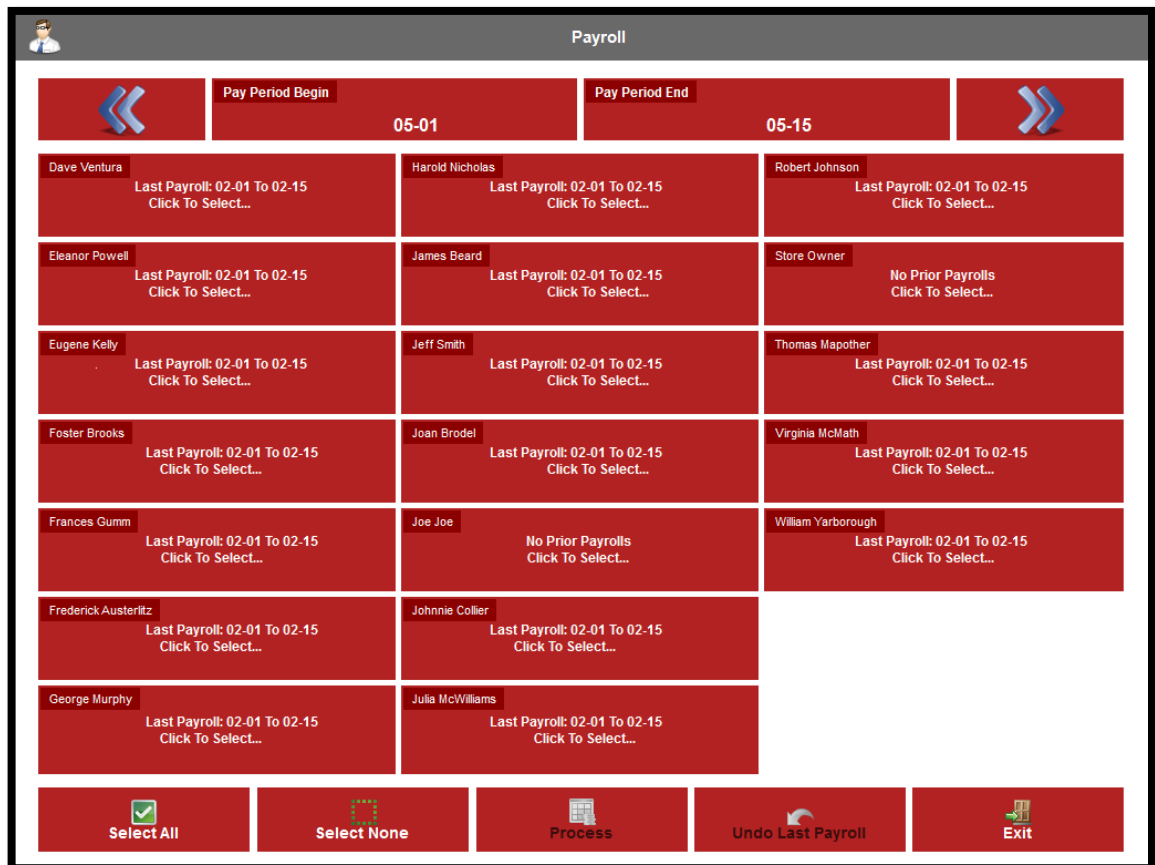




Figure 16-1

To process your payroll, first select the desired pay period by clicking the *next*  and *previous*  buttons at the top of the screen.

Next, select the employees for whom you wish to process the payroll by clicking on their respective buttons. To select all of your employees at once, click the *Select All* button in the lower left corner of the screen. To deselect all of your employees at once, click the *Select None* button to the right of the *Select All* button.

Once the desired employees have been selected, click the *Process* button to process your payroll for the selected payroll period.

Once the payroll is processed, the information is saved to the database. A report is available that displays the payroll information. The information in this report may be used to create payroll checks for your employees.

UNDO LAST PAYROLL BUTTON

If you need to reverse your last payroll after it has already been processed, click the *Undo Last Payroll* button. The payroll is reversed as though it had never been processed in the first place. Please note that only the last payroll may be reversed; any payroll prior to the last one processed may not be reversed in this manner.

Chapter 17 — Customer List

Customer Types

Customer types are created to allow the categorization of customers into multiple types so that different pricing levels and order discounts may be assigned to each of these types. Customer Types are also used for reporting purposes.

In Customer Types, click on the *New* button to display the Customer Types – [Add New Record] screen. Enter “Standard Customer” in the Customer Type Name field. Next, click the *down arrow* button to the right of the Price Level field and select *Standard Pricing* from the dropdown list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the customer type you just created and begin a new one (See Figure 17-1).

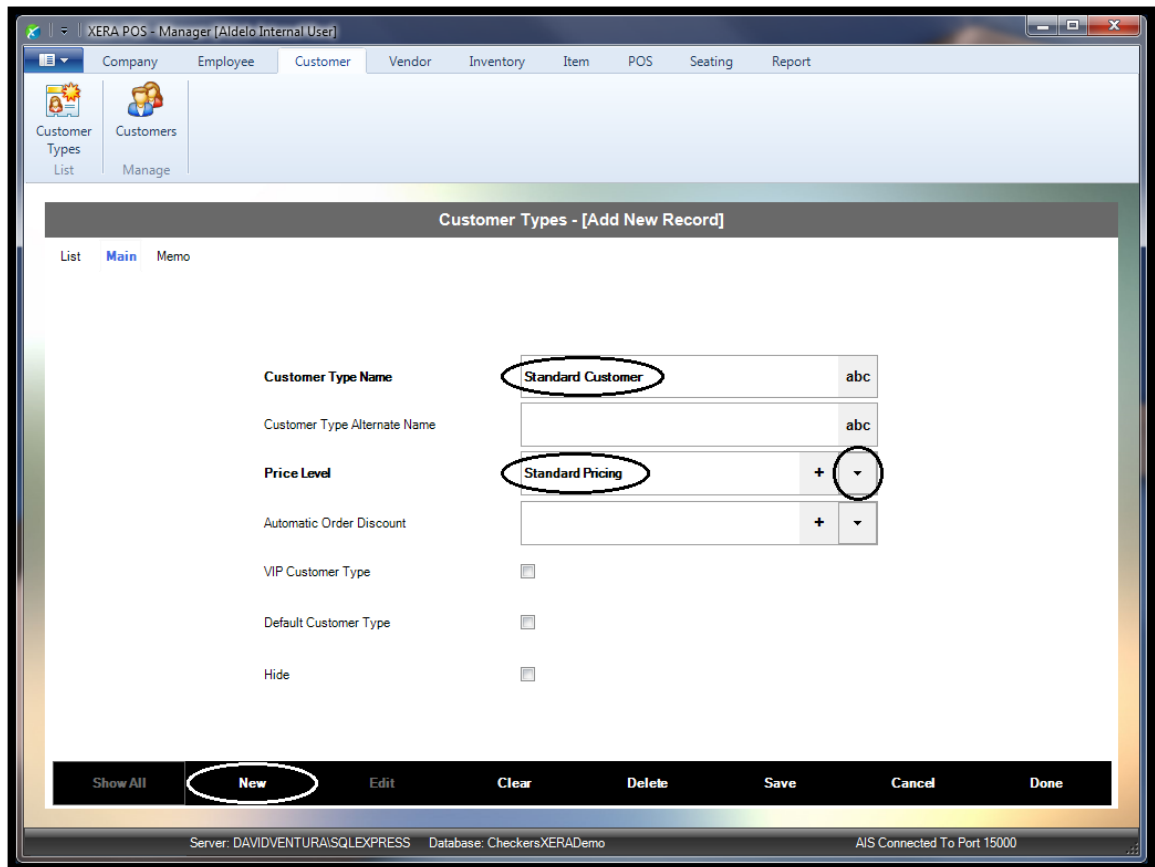


Figure 17-1

Now enter the rest of these customer types with their associated price levels as listed in the following table:

Customer Type Name	Price Level
Standard Customer	Standard Pricing
Senior Citizen	Senior Pricing
Student	Student Pricing

When finished, click the *Save* and *Done* buttons to save the last customer type entered and exit the Add Customer Types screen.

Chapter 18 — Customer Manage

Customers

Personal and business information about each of your customers is entered into the Customers feature of XERA® POS. This information is used primarily for delivery orders, customer loyalty programs, and marketing purposes. Much of this information is optional at the discretion of the management.

In Customers, click on the *New* button to display the Customers [Add New Record] screen. The first three fields are not editable and the information is captured when the record is saved. The Entry Date/Time field captures its information from the system time. The Account Number is generated automatically, beginning with 1, and incremented by one with each new customer record that is entered. The Store Number field captures its information from the database.

Enter “Dave” in the First Name field and “Ventura” in the Last Name field. Next, click the *down arrow* button to the right of the Customer Type field and select *Standard Customer* from the list. Beneath that, enter the current date in the Join Date field and the customer’s phone number, “2095557777” in the Phone field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the customer you just entered and begin a new one (See Figure 18-1).

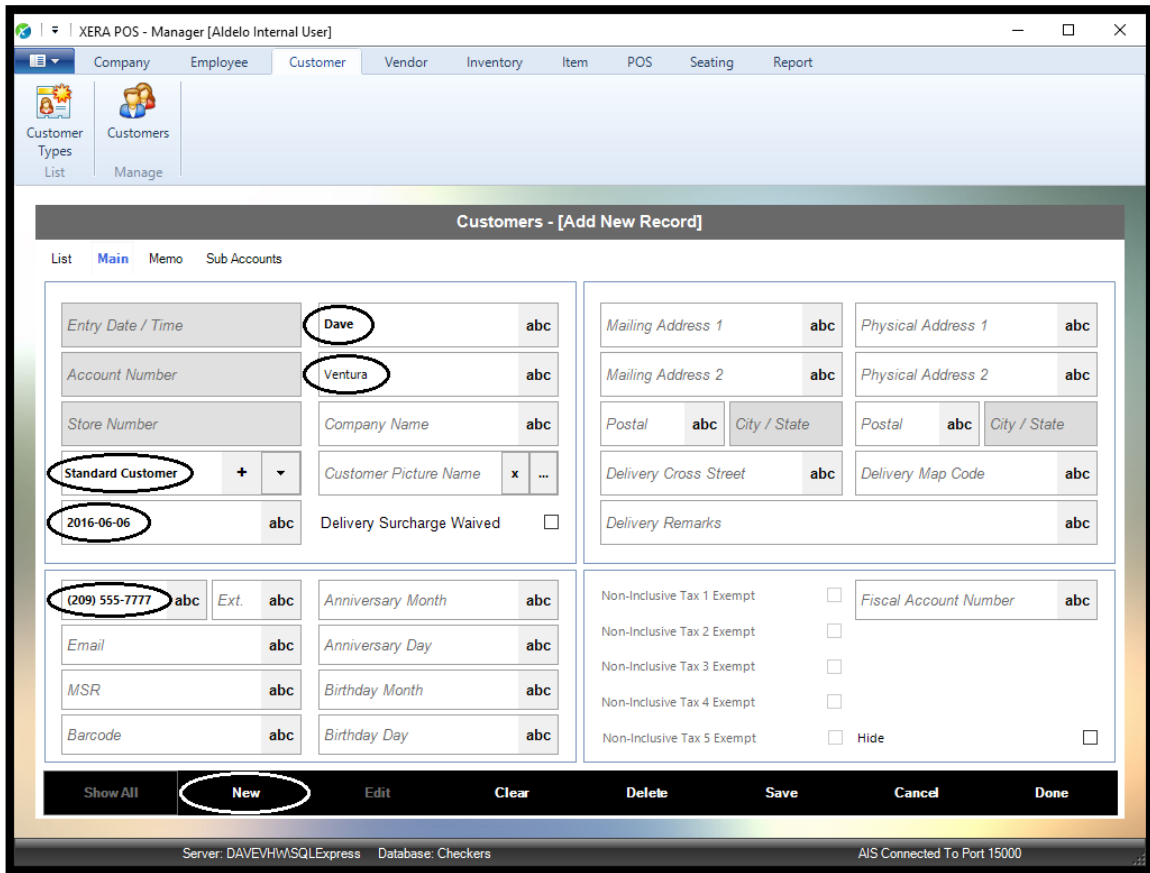


Figure 18-1

Now enter the rest of these customers as listed in the following table:

First Name	Last Name	Customer Type	Phone
Dave	Ventura	Standard Customer	2095557777
Eleanor	Powell	Standard Customer	9255555555
Harold	Nicholas	Student	4085555555

When finished, click the *Save* button to save the last employee entered.

Next, click on the *List* Tab to display the list of customers you just entered and double-click on *Dave Ventura* to display his record under the *Main* Tab. Click the *Sub Accounts* Tab and then click the *New Entry* button.

A sub account is one that is tied to a master account. For example, a local business owner might be the master account holder while each of his employees are sub account holders. This allows the business to group the owner and all of his employees together as though they were a single entity, and gives it any benefits afforded to a customer account that has a high amount of purchases from the restaurant.

Under the Sub Account Details group box, enter the first and last names of your sub account holder in their respective fields. The entry of the remainder of the information is optional at the discretion of the manager. For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *Save Entry* button to save the new sub account holder to the Sub Accounts List on the left side of the screen (See Figure 18-2).

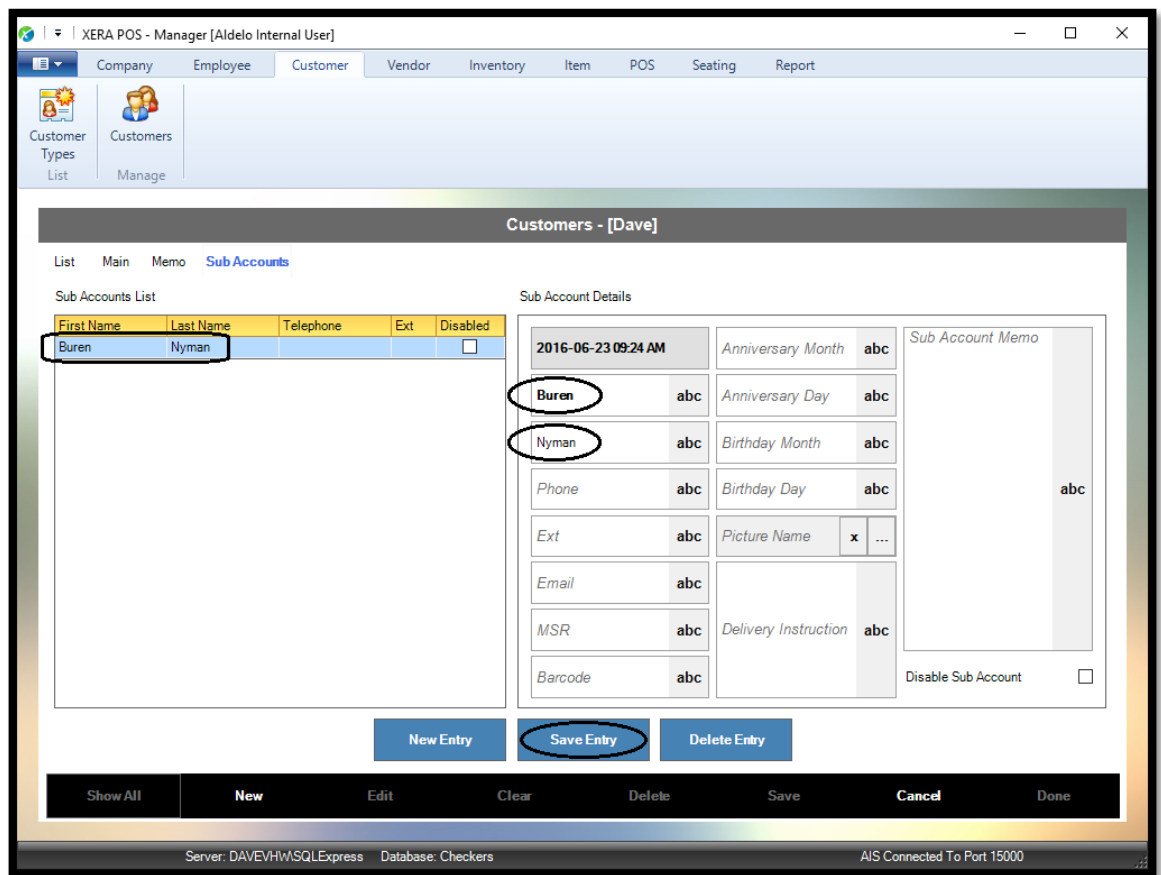


Figure 18-2

For our training purposes, we will only enter one sub account. Click the *Cancel* button to exit the Customers screen.

Chapter 19 — Vendor List

Vendor Types

Vendor Types are created to allow the categorization of the vendors you do business with by type, products or services purchased from them, etc. Vendor types are used primarily for reporting purposes.

In Vendor Types, click on the *New* button to display the Vendor Types – [Add New Record] screen. Enter “Fresh Produce” in the Vendor Type Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the vendor type you just entered and begin a new one (See Figure 19-1).

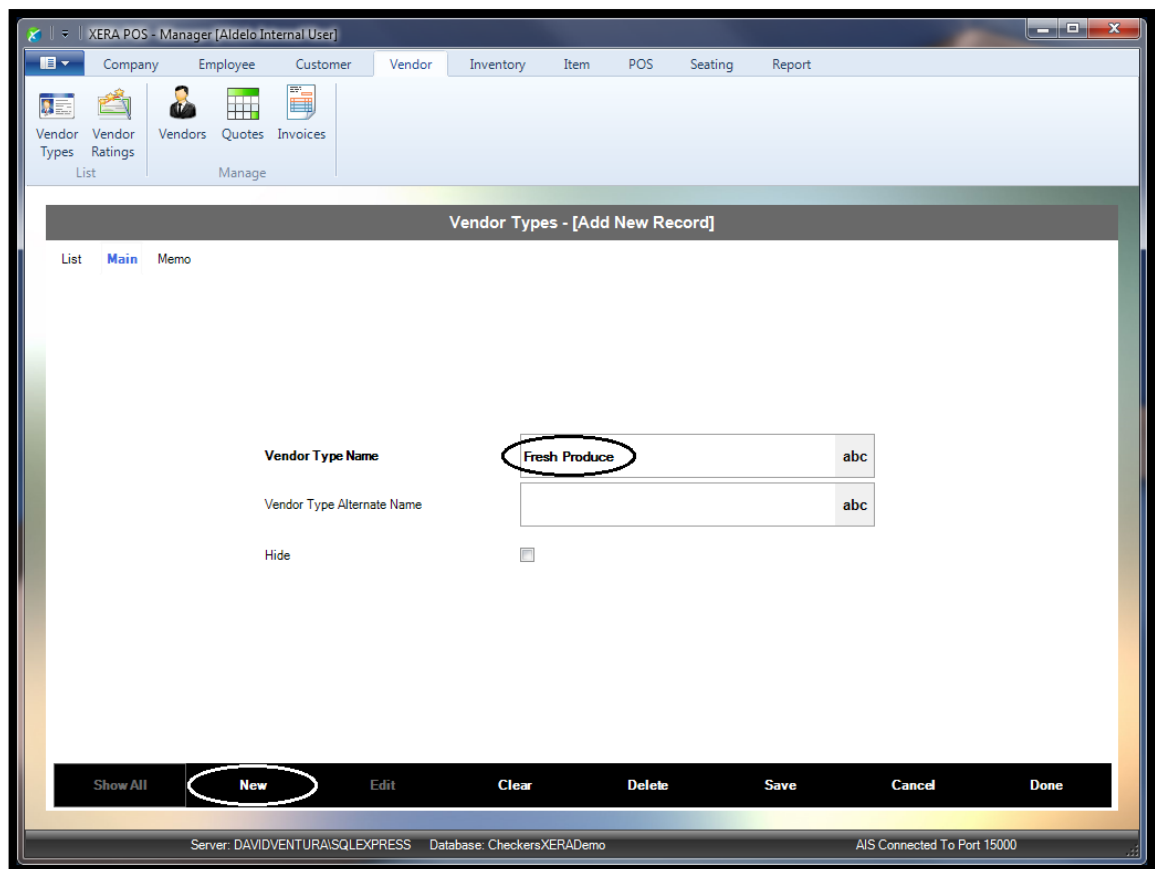


Figure 19-1

Now enter the rest of these vendor types as listed in the following table:

Vendor Type Name
Fresh Produce
Meat and Fish
Soft Drinks
Beer
Wine and Liquor
Restaurant Supplies
Utilities
Insurance
State Taxes
Federal Taxes
Licenses and Permits
Miscellaneous Vendors

When finished, click the *Save* and *Done* buttons to save the last vendor type entered and exit the Add Vendor Type screen.

Vendor Ratings

Vendor Ratings are defined as your levels of satisfaction with your vendors. Vendor ratings are created by the management as required and can be defined as anything you wish. As such, these ratings are subjective.

For example, the manager might create vendor ratings such as “Excellent Service,” “Average Service,” and “Poor Service.” You could instead create vendor ratings such as “Primary Vendor,” “Secondary Vendor,” and “Vendor of Last Resort.” Since a vendor rating is based upon your level of satisfaction with the vendor, a vendor’s rating is subject to change from time to time and should be revisited occasionally. Assignment of a vendor rating to a vendor is optional at the discretion of the management.

In Vendor Ratings, click on the *New* button to display the Vendor Ratings – [Add New Record] screen. Enter “Excellent Service” in the Vendor Rating Name field. Next, enter “10” in the Sort Order field. The values entered in the Sort Order field control the order in which the vendor ratings display under the List Tab. Numbering the sort order in multiples of ten allows the entry of new vendor ratings between your existing vendor ratings in the future without the need to renumber all of your existing sort order values.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the vendor rating you just entered and begin a new one (See Figure 19-2).

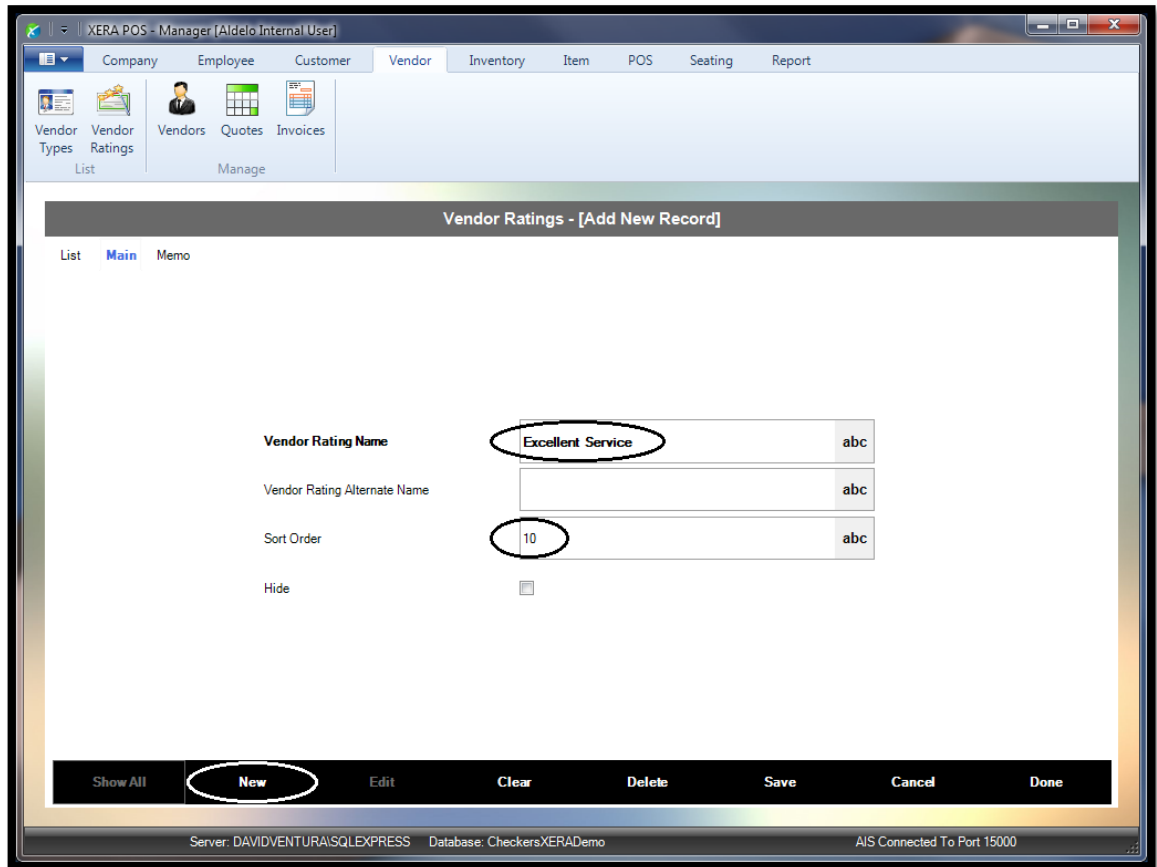


Figure 19-2

Now enter the rest of these vendor ratings as listed in the following table:

Vendor Rating Name	Sort Order
Excellent Service	10
Average Service	20
Poor Service	30

When finished, click the *Save* and *Done* buttons to save the last vendor rating entered and exit the Add Vendor Rating screen.

Chapter 20 — Vendor Manage

Vendors

The Vendors feature of the XERA® POS Manager application allows the manager to maintain contact information and other information for all of his vendors in one central location. This information is accessible by the manager at any time, and is also used for reporting purposes.

In Vendors, click on the *New* button to display the Vendors – [Add New Record] screen. Enter “Atlantic Produce Co.” in the Vendor Name field. Next, click the *down arrow* button to the right of the Vendor Type field and select *Fresh Produce* from the list.

Finally, click the *down arrow* button to the right of the Vendor Rating field and select *Excellent Service* from the list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the vendor you just entered and begin a new one (See Figure 20-1).

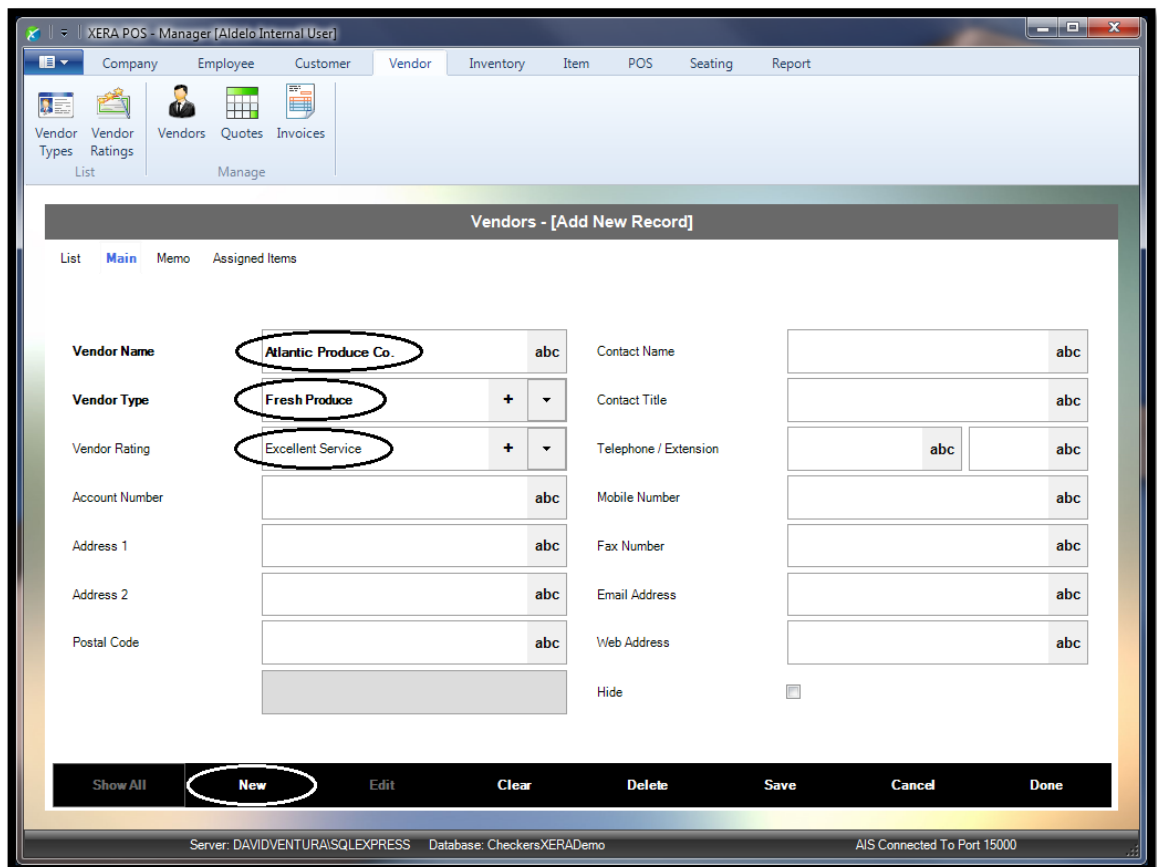


Figure 20-1

Now enter the rest of these vendors as listed in the following table:

Vendor Name	Vendor Type	Vendor Rating
Atlantic Produce Co.	Fresh Produce	Excellent Service
Orchard Produce Dist.	Fresh Produce	Average Service
Willingham Meat Co.	Meat and Fish	Excellent Service
Durham Distributors	Restaurant Supplies	Excellent Service
Century Beverage Co.	Soft Drinks	Average Service
Fairbanks Liquor Co.	Wine and Liquor	Excellent Service
Milligan Meats and Seafood	Meat and Fish	Average Service
Chicago Casualty Co.	Insurance	Average Service
Pacific Beverage Dist.	Soft Drinks	Poor Service
Dept. of Water and Power	Utilities	Excellent Service
General Telephone Co.	Utilities	Excellent Service
Modesto Scavenger Co.	Utilities	Average Service
Krueger Dist. Co.	Beer	Excellent Service
Chandler Window Washing Svc.	Miscellaneous Vendors	Excellent Service
City of Modesto	Licenses and Permits	Average Service
Stanislaus County	Licenses and Permits	Excellent Service
State Board of Equalization	State Taxes	Average Service
Franchise Tax Board	State Taxes	Average Service
Internal Revenue Service	Federal Taxes	Poor Service

When finished, click the *Save* and *Done* buttons to save the last vendor entered and exit the Add Vendor screen.

Quotes

Reserved for future use.

Invoices

Reserved for future use.

Chapter 21 — Inventory List

Inventory Units

The Inventory Units feature of XERA® POS allows the creation of different units of measure by which your products are purchased, stored, and sold. These inventory units are then assigned to the various inventory and product items in your restaurant to indicate their quantities on hand.

In Inventory Units, click on the *New* button to display the Inventory Units – [Add New Record] screen. Enter “Ounce” in the Inventory Unit Name field. We will leave the rest of the settings at their default values.

When finished, click the *New* button to save the inventory unit you just entered and begin a new one (See Figure 21-1).

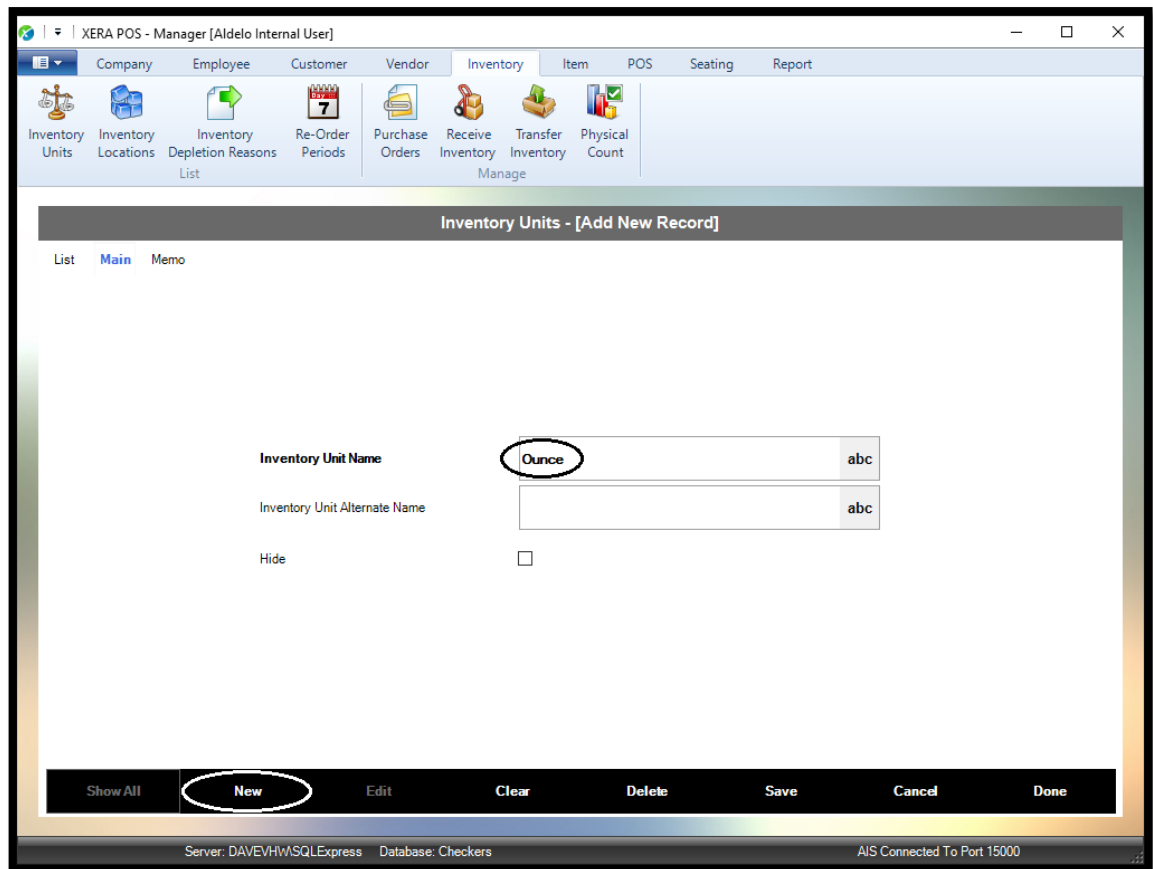


Figure 21-1

Now enter the rest of these inventory units as listed in the following table:

Inventory Unit Name
Ounce
Pound
Gram
Kilogram
Each
Dozen
Box
Case
Cup
Pint
Quart
Gallon
Milliliter
Liter

When finished entering all of your inventory units, click the *Save* and *Done* buttons to save the information and exit the Add Inventory Unit screen.

Inventory Locations

The Inventory feature of the XERA® POS Manager application allows the manager to create a list of locations where inventory items may be stored. The cost center to which the inventory location is tied is also displayed. This information is accessible by the manager at any time, and is used primarily for physical inventory reporting purposes.

In Inventory Locations, click on the *New* button to display the Inventory Locations – [Add New Record] screen. Enter “Back Freezer” in the Inventory Location Name field. Next, click the *down arrow* button to the right of the Cost Center field and select *Kitchen* from the list.

Finally, enter “10” in the Sort Order field. The values entered in the Sort Order field control the order in which the inventory locations display under the List Tab. Numbering the sort order in multiples of ten allows the entry of new inventory locations between your existing inventory locations in the future without the need to renumber all of your existing sort order values.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the inventory location you just entered and begin a new one (See Figure 21-2).

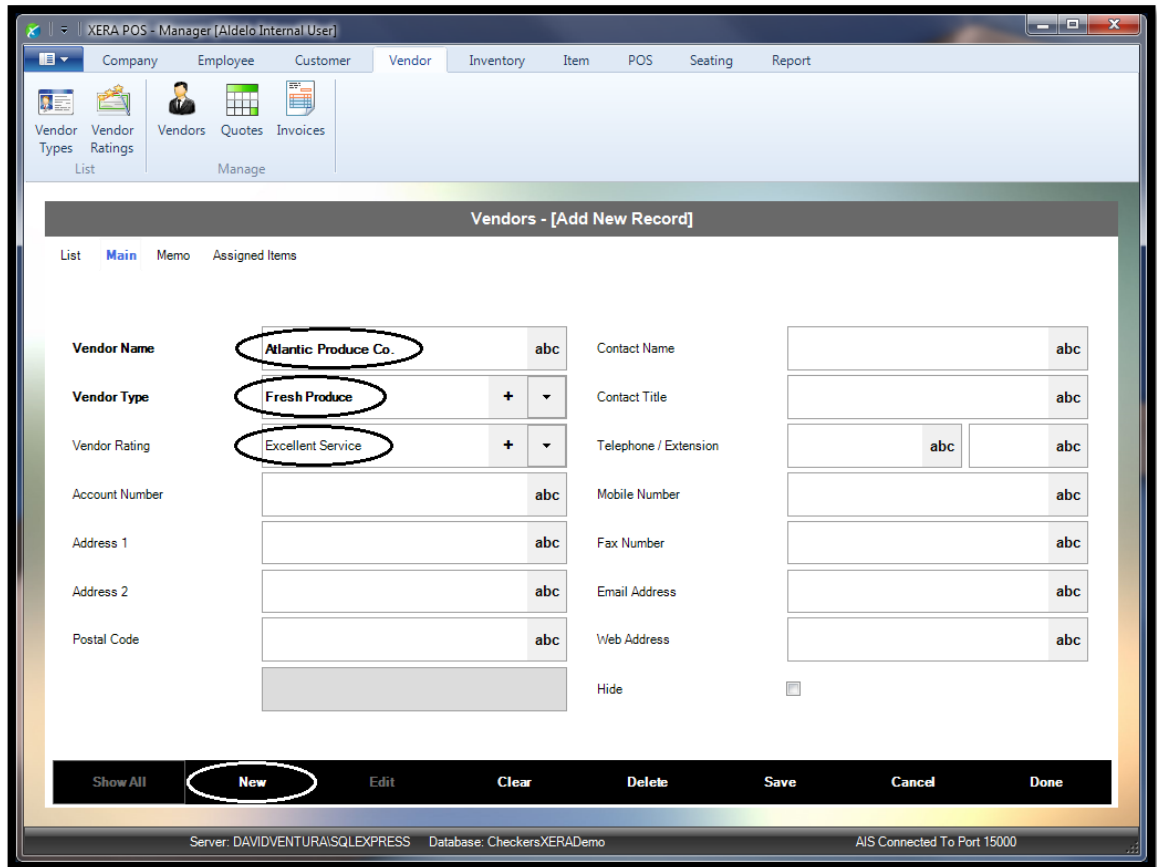


Figure 21-2

Now enter the rest of these inventory locations as listed in the following table:

Inventory Location Name	Cost Center	Sort Order
Back Freezer	Back Storage	10
Back Cooler	Back Storage	20
Back Dry Storage	Back Storage	30
Kitchen Cooler	Kitchen	40
Kitchen Pantry	Kitchen	50
Front Cooler	Beverage Station	60
Bar	Bar	70

When finished, click the *Save* and *Done* buttons to save the last inventory location entered and exit the Add Inventory Location screen.

Inventory Depletion Reasons

Inventory Depletion Reasons are created in advance in XERA® POS so that they may be selected by simply clicking on them, thus eliminating the time consuming process of entering inventory depletion reasons manually via an onscreen virtual keyboard each time an inventory item is depleted. The text of the inventory depletion reasons may be anything that the manager desires and they are customizable to the business.

In Inventory Depletion Reasons, click on the *New* button to display the Inventory Depletion Reasons [Add New Record] screen. Enter “Sales” in the Depletion Reason Name field. For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the inventory depletion reason you just entered and begin a new one (See Figure 21-3).

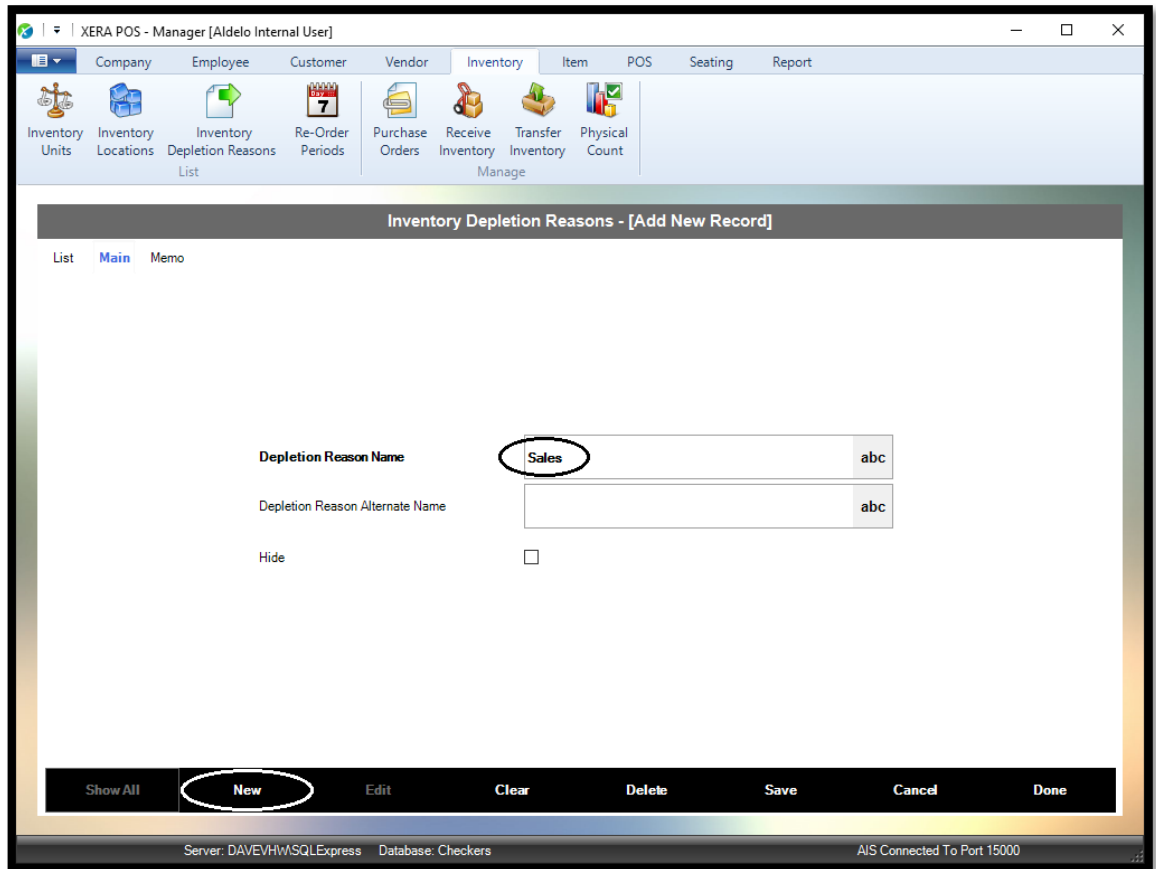


Figure 21-3

Now enter the rest of these inventory depletion reasons as listed in the following table:

Inventory Depletion Reason Name
Sales
Gift
Lost
Spoilage
Theft
Shrinkage
Delivery Shortage

When finished, click the *Save* and *Done* buttons to save the last inventory depletion reason entered and exit the Add Inventory Depletion Reason screen.

Re-Order Periods

Re-Order Periods are defined as the frequency by which you place your orders to replenish your inventory items. The information entered into this feature is used for reporting purposes. The text of the re-order period names may be anything that the manager desires and they are customizable to the business.

In Re-Order Periods, click on the *New* button to display the Re-Order Periods - [Add New Record] screen. Enter “Weekly” in the Re-Order Period Name field. For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the re-order period you just entered and begin a new one (See Figure 21-4).

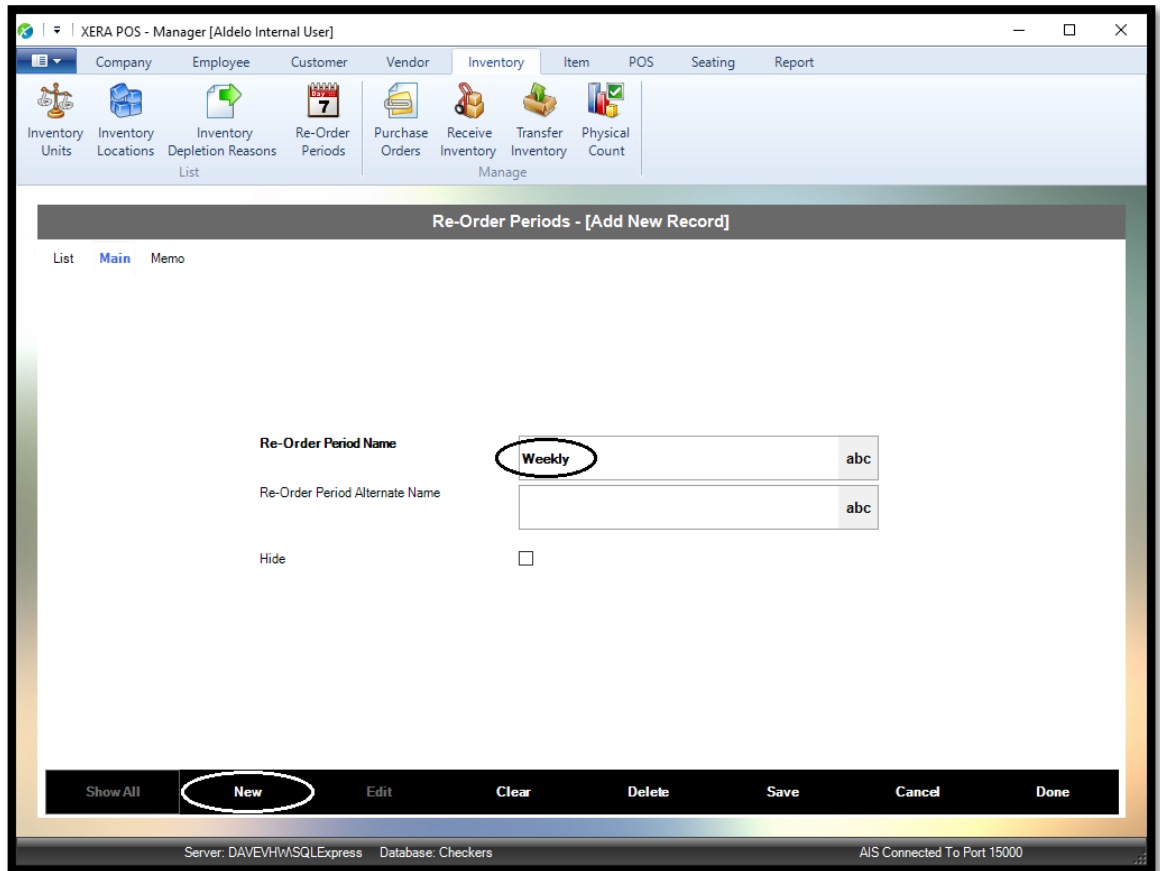


Figure 21-4

Now enter the rest of these re-order periods as listed in the following table:

Re-Order Period Name
Weekly
Monthly
Daily
Bi-Weekly
Semi-Monthly
Twice / Week
Three Times / Week

When finished, click the *Save* and *Done* buttons to save the last re-order period entered and exit the Add Re-Order Period screen.

Chapter 22 — Inventory Manage

Purchase Orders

Reserved for future use.

Receive Inventory

Reserved for future use.

Transfer Inventory

Reserved for future use.

Physical Count

Reserved for future use.

Chapter 23 — Item List

Item Departments

Item Departments are used to group your items so that similar items are assigned to the same department. Examples of item departments might include Food, Beverages, and Non-Food Items. Item departments are used primarily for reporting purposes.

In Item Departments, click on the *New* button to display the Item Departments – [Add New Record] screen. Enter “Food” in the Item Department Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the item department you just entered and begin a new one (See Figure 23-1).

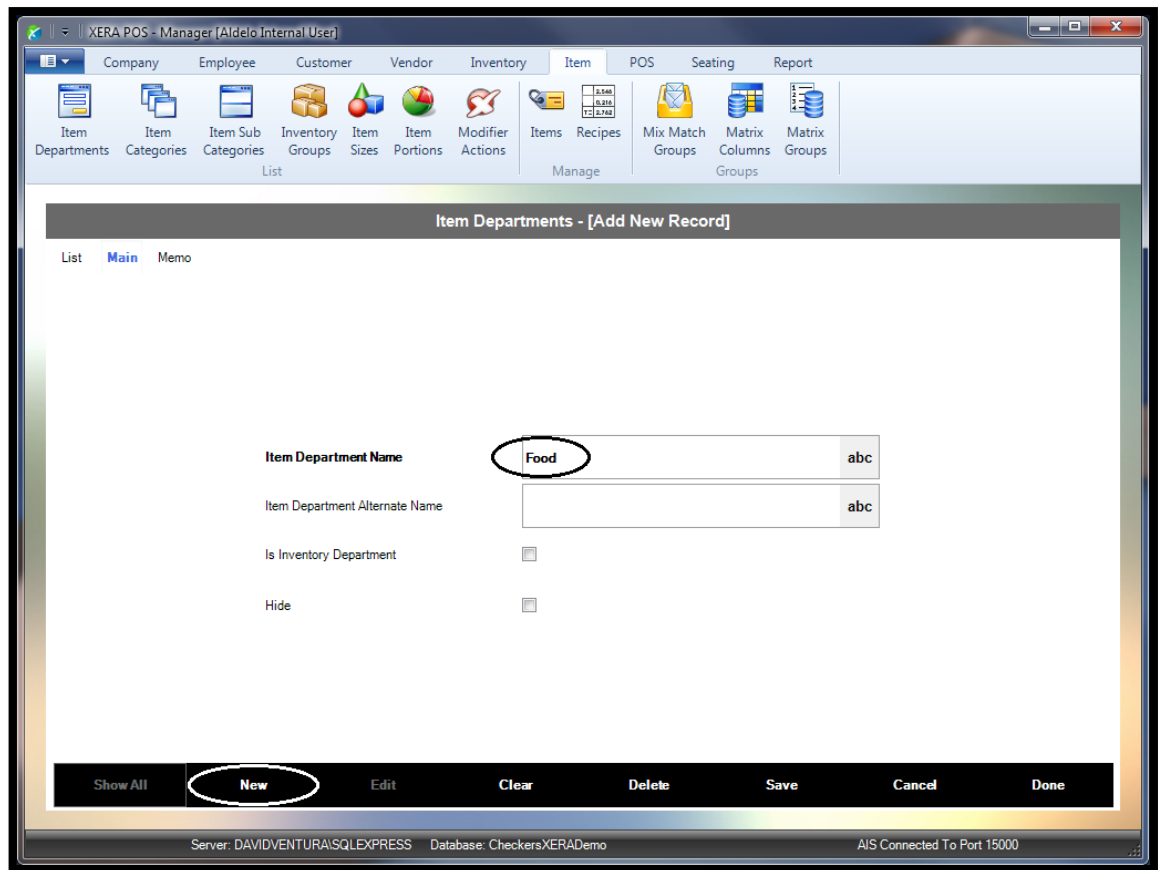


Figure 23-1

Now enter the rest of these item departments as listed in the following table:

Item Department Name
Food
Beverages
Non-Food Items
Supplies

When finished, click the *Save* and *Done* buttons to save the last item department entered and exit the Add Item Department screen.

Item Categories

Item Categories are further refinements of item departments. They allow the item departments to be divided into logical categories of items. Examples of item categories within the Beverages department might include Beer, Wine, Liquor, and Soft Drinks. Item categories are used primarily for reporting purposes.

The creation of item departments as described above automatically creates an item category for each item department. Each of these category's names is the same as the name of the item department with the word "Other" appended to it. These automatically generated item categories may be viewed under the List Tab.

For example, since we created an item department named "Beverages," an item category named "Beverages Other" is generated automatically and added to the item categories displayed under the List Tab.

In Item Categories, click on the *New* button to display the Item Categories – [Add New Record] screen. Next, enter "Soft Drinks" in the Item Category Name field.

Finally, click the *down arrow* button to the right of the Item Department field and select *Beverages* from the list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the item category you just entered and begin a new one (See Figure 23-2).

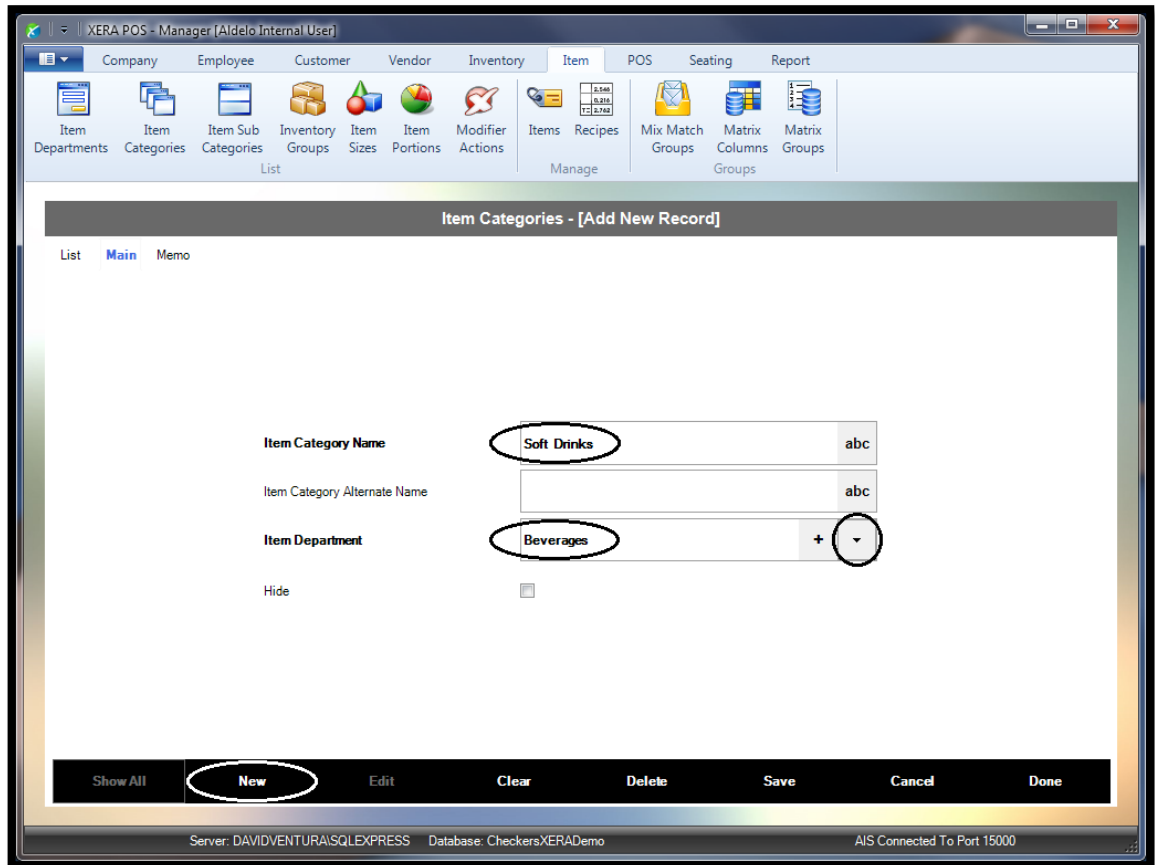


Figure 23-2

Now enter the rest of these item categories as listed in the following table:

Item Category Name	Item Department
Soft Drinks	Beverages
Beer	Beverages
Wine	Beverages
Liquor	Beverages
Appetizers	Food
Salads	Food
Entrees	Food
Side Dishes	Food
Desserts	Food
Clothing	Non-Food Items
Souvenirs	Non-Food Items
Cleaning Supplies	Supplies
Office Supplies	Supplies
Disposables	Supplies

When finished, click the *Save* and *Done* buttons to save the last item category entered and exit the Add Item Category screen.

Item Sub Categories

Item Sub Categories are further refinements of item categories. They allow the item categories to be further divided into logical groups of items. Examples of item sub categories within the Liquor category of the Beverage department might include Vodka, Brandy, Gin, and Scotch. Item sub categories are used primarily for reporting purposes.

The creation of item departments as described above automatically creates an item sub category for the automatically created item category for each item department. Each of these sub category's names is the same as the name of the item category with the word "Details" appended to it. These automatically generated item sub categories may be viewed under the List Tab.

For example, since we created an item department named "Beverages," an item category named "Beverages Other" is generated automatically. Consequently, an item sub category named "Beverages Other Details" is generated automatically and added to the item sub categories displayed under the List Tab.

In Item Sub Categories, click on the *New* button to display the Item Sub Categories – [Add New Record] screen. Next, enter "Soda" in the Item Sub Category Name field. Finally, click the *down arrow* button to the right of the Item Category field and select *Soft Drinks* from the list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the item sub category you just entered and begin a new one (See Figure 23-3).

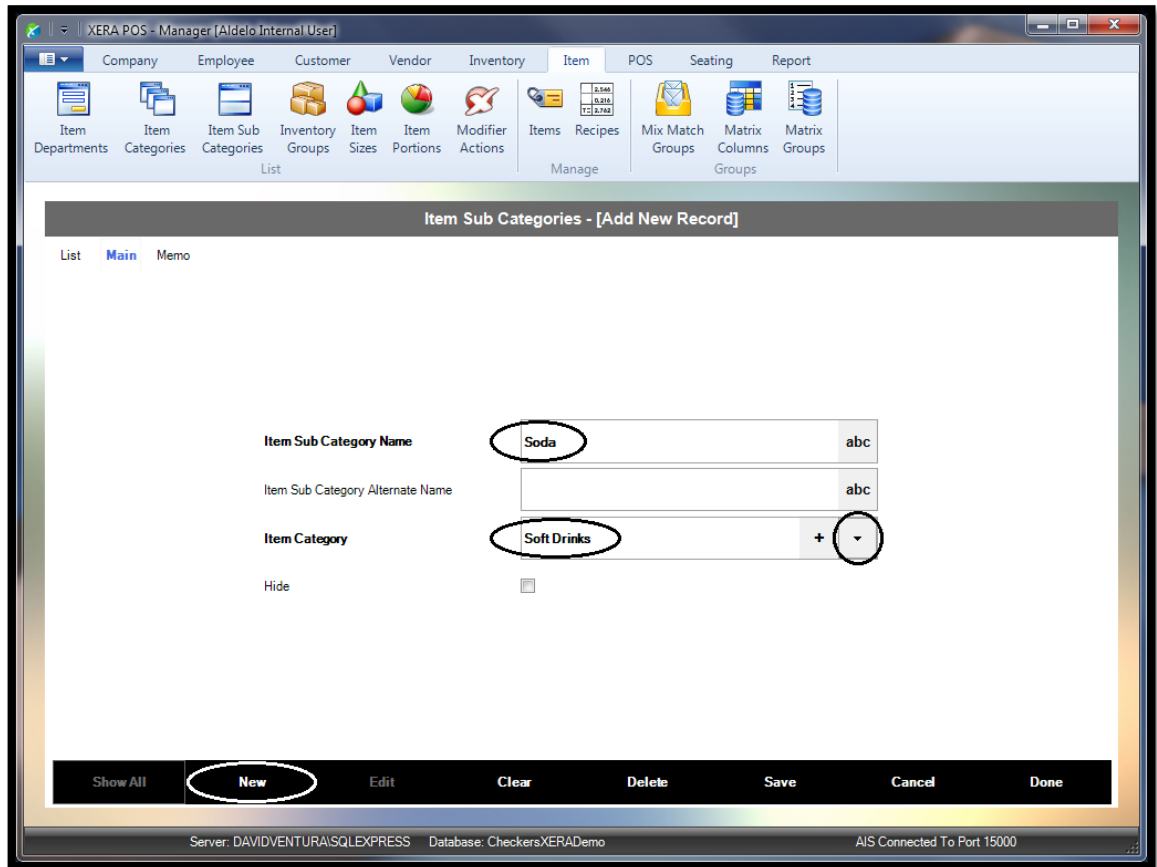


Figure 23-3

Now enter the rest of these item sub categories as listed in the following table:

Item Sub Category Name	Item Category
Soda	Soft Drinks
Juice	Soft Drinks
Coffee and Tea	Soft Drinks
Vodka	Liquor
Gin	Liquor
Brandy	Liquor
Scotch	Liquor
Liqueurs	Liquor
Chardonnay	Wine
Zinfandel	Wine
Burgundy	Wine
Domestics	Beer
Imports	Beer
Meat Appetizers	Appetizers
Vegetable Appetizers	Appetizers
Potato Appetizers	Appetizers
Vegetable Side Dishes	Side Dishes
Potato Side Dishes	Side Dishes
Rice Side Dishes	Side Dishes
Side Salads	Salads
Dinner Salads	Salads
Meat Dishes	Entrees
Seafood Dishes	Entrees
Specialty Pizzas	Entrees
Cakes	Desserts
Pies	Desserts
Frozen Desserts	Desserts
Cleaning Products (Paper)	Cleaning Supplies
Cleaning Products (Chemicals)	Cleaning Supplies
Cleaning Products (Implements)	Cleaning Supplies
Office Products (Paper)	Office Supplies
Computer Supplies	Office Supplies
Office Products (Implements)	Office Supplies
Dining Products	Disposables
Kitchen Products	Disposables

When finished, click the *Save* and *Done* buttons to save the last item sub category entered and exit the Add Item Sub Category screen.

Inventory Groups

Inventory Groups are created to allow the assignment of inventory items to logical groups for reporting purposes.

In Inventory Groups, click on the *New* button to display the Inventory Groups – [Add New Record] screen. Enter “Food” in the Inventory Group Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the inventory group you just entered and begin a new one (See Figure 23-4).

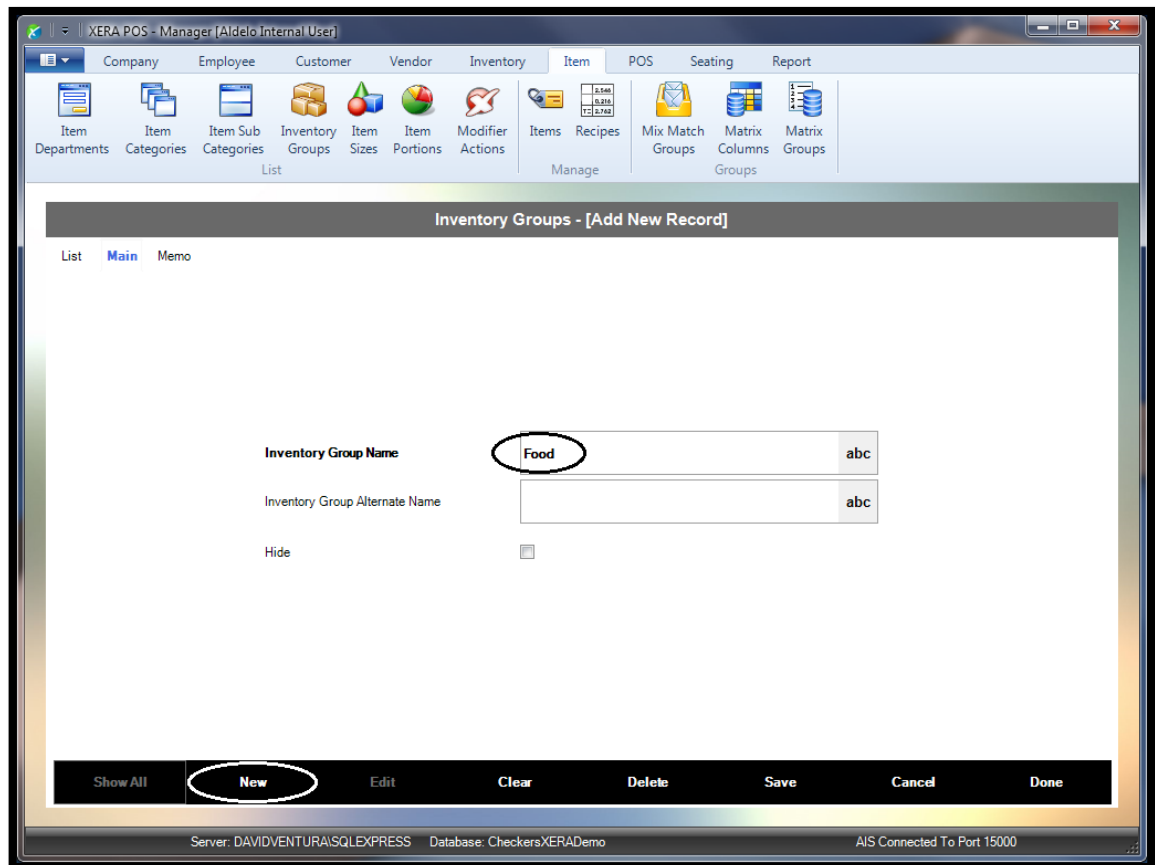


Figure 23-4

Now enter the rest of these inventory groups as listed in the following table:

Inventory Group Name
Food
Bar Mixers
Beer
Wine
Liquor
Soft Drinks
Condiments
Garnishes
Seasonings

When finished, click the *Save* and *Done* buttons to save the last inventory group entered and exit the Add Inventory Group screen.

Item Sizes

Item Sizes are created to allow items that come in two or more different sizes to be categorized by size. Item sizes may be as simple as Small, Medium, and Large, or as complex as 24 Pack, Jumbo, Individual Size, and Party Pack. Sizes may be created as needed.

In Item Sizes, click on the *New* button to display the Item Sizes – [Add New Record] screen. Enter “Small” in the Item Size Name field.

Next, in the Item Size Group Number field, enter “1” to assign this item size to group #1. The Item Size Group Number allows the grouping of sizes that are related to one another under the same group number. The sort order (described below) then sorts the item sizes within that group number only. For example, Small, Medium, and Large might be assigned to the same item size group number whereas 6 Pack, 12 Pack, and 24 Pack are assigned to a different item size group number.

Finally, enter “10” in the Sort Order field to dictate the order in which your item sizes within this item size group display on the screen. The item size with the lowest sort order number displays first, the item size with the second lowest sort order number displays second, etc.

It is a good idea to leave gaps in the sort order numbering (for example, numbering by tens) so that additional item sizes may be inserted in the future, if necessary, without the need to renumber all of the existing item sizes to make room to place a new item size between two existing item sizes.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the item size you just entered and begin a new one (See Figure 23-5).

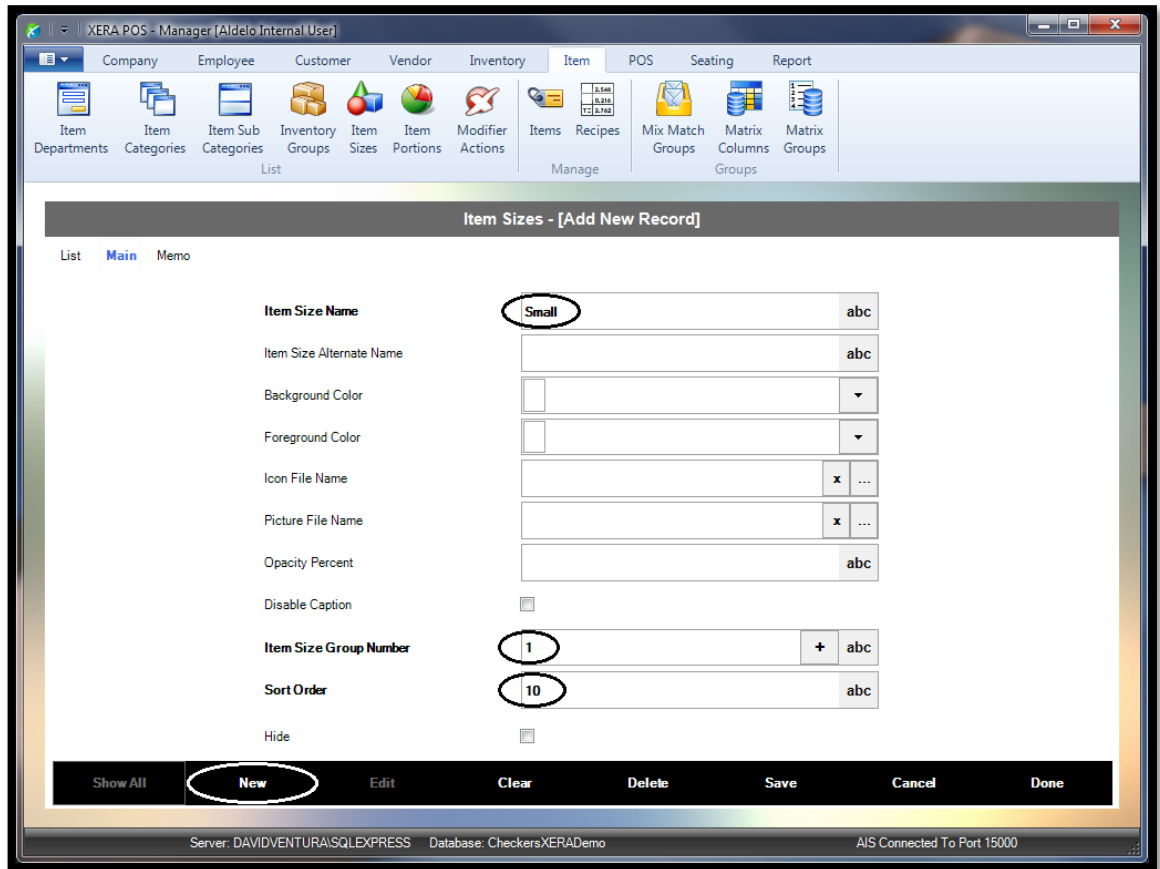


Figure 23-5

Now enter the rest of these item sizes as listed in the following table:

Item Size Name	Item Size Group Number	Sort Order
Small	1	10
Medium	1	20
Large	1	30
Extra Large	1	40
Half Size	2	10
Full Size	2	20
Jumbo Size	2	30

When finished, click the *Save* and *Done* buttons to save the last item size entered and exit the Add Item Size screen.

Item Portions

Item Portions are defined as fractions of the whole menu item. XERA® POS allows the creation of halves, thirds, and quarters of menu items, as well as whole menu items. Item portions are used when the customer wants to order an item with different preparation ingredients on two or more portions of the same menu item.

In Item Portions, click on the *New* button to display the Item Portions – [Add New Record] screen. Enter “Whole” in the Item Portion Name field. Next, click the *down arrow* button to the right of the Item Portion Type field and select “Whole” from the list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the item portion you just entered and begin a new one (See Figure 23-6).

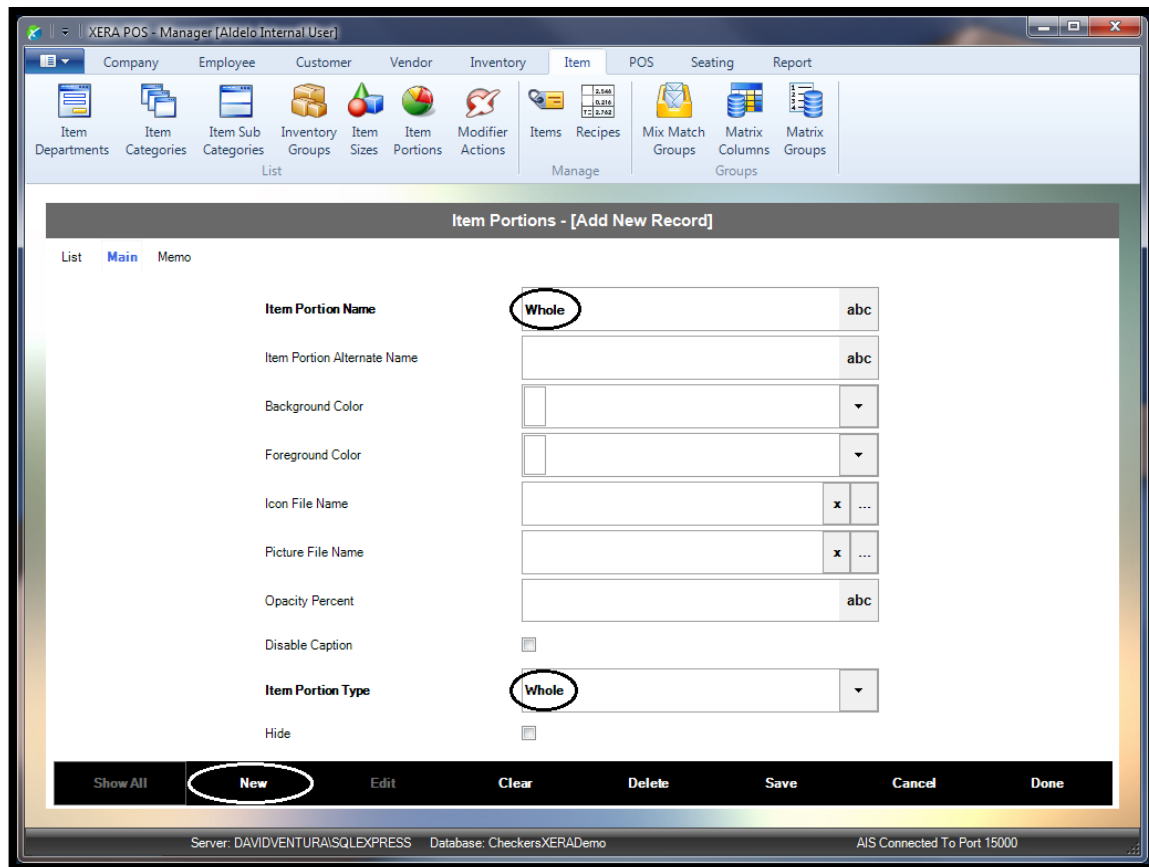


Figure 23-6

Now enter the rest of these item portions as listed in the following table:

Item Portion Name	Item Portion Type
Whole	Whole
1st Half	Halves
2nd Half	Halves
1st Third	Thirds
2nd Third	Thirds
3rd Third	Thirds
1st Quarter	Quarters
2nd Quarter	Quarters
3rd Quarter	Quarters
4th Quarter	Quarters

When finished, click the *Save* and *Done* buttons to save the last item size entered and exit the Add Item Size screen.

Modifier Actions

Modifier Actions are defined as preparation steps performed on a menu item by the kitchen staff, as requested by the customer, that alters it from the normal method of preparation.

Modifier actions should not be confused with modifier items. Modifier items are items requested by the customer to be added to or deleted from the menu item whereas modifier actions define how the modifier items are applied to the menu item. For example, a modifier item might be cheese that may be applied to a hamburger or cheeseburger; however, the modifier action would define how the cheese is applied, such as “add” cheese, “double” cheese, “triple” cheese, “half” cheese, or “no” cheese.

In Modifier Actions, click on the *New* button to display the Modifier Actions – [Add New Record] screen. Enter “Add” in the Modifier Action Name field. Next, enter “1.0” in the Modifier Count Value field. The Modifier Count Value tells XERA® POS how to charge for the modifier with this action applied.

For example, a modifier count value of “1.0” causes the full list price of the modifier item to be charged to the ticket, whereas a modifier count value of “2.0” causes double the full list price to be charged to the ticket.

The Modifier Count Value field also accepts decimal values. For example, for the “Half” modifier action, you might enter “0.5” for the modifier count value.

For our training purposes, we will leave the rest of the Modifier Action settings at their default values.

When finished, click the *New* button to save the modifier action you just entered and begin a new one (See Figure 23-7).

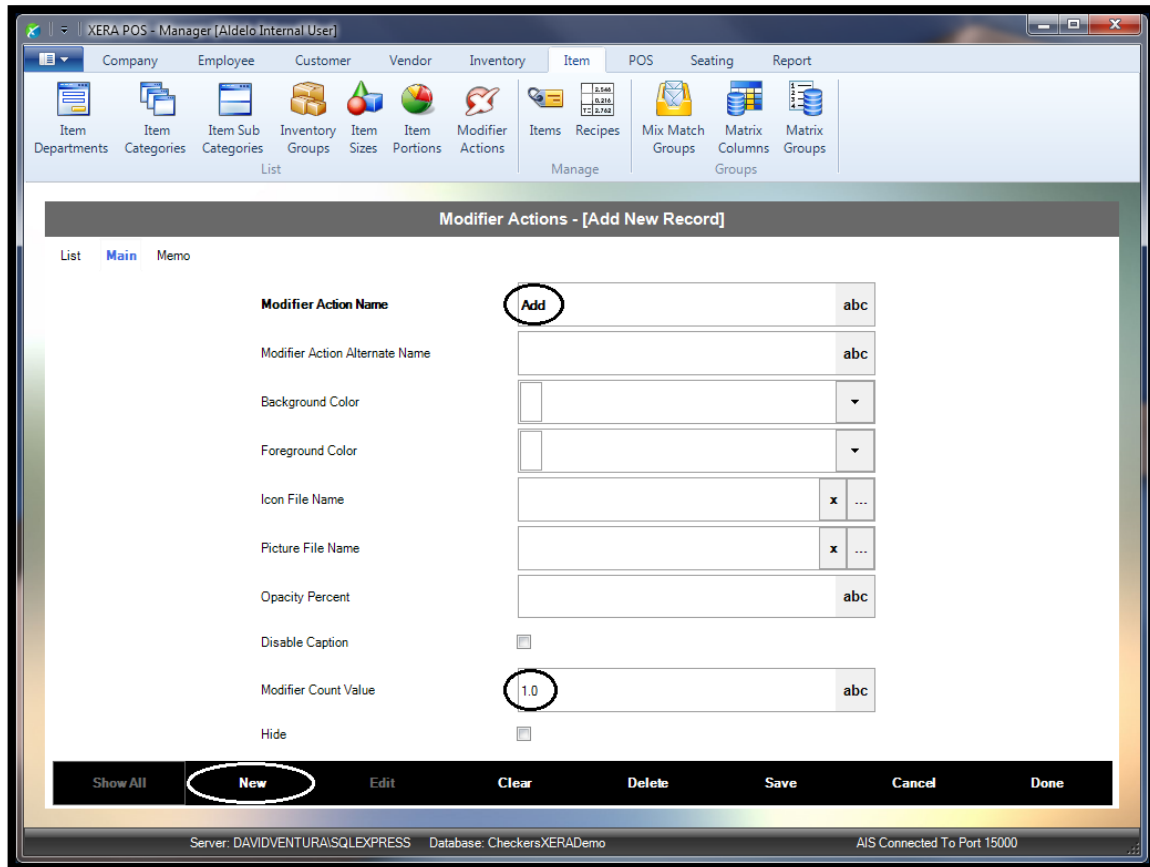


Figure 23-7

Now enter the rest of these modifier actions as listed in the following table:

Modifier Action Name	Modifier Count Value
Add	1.0
Extra	1.5
Light	0.7
No	0.0
Double	2.0
Triple	3.0
Half	0.5

When finished, click the *Save* and *Done* buttons to save the last modifier action entered and exit the Add Modifier Action screen.

Chapter 24 — Item Manage

Items

In XERA® POS, items encompass product items, inventory items, item modifiers, preparation instruction modifiers, etc. All of these different categories are considered items. We will now setup the product items for our Checkers Restaurant.

In Items, click on the *New* button to display the Items – [Add New Record] screen. Enter “Buffalo Wings” in the Item Name field.

Next, select the *Is Product Item* checkbox. This reveals several more tabs under which you enter information related to product items.

Continuing under the Main Tab, select *Food* from the Item Department dropdown list, select *Appetizers* from the Item Category dropdown list, select *Meat Appetizers* from the Item Sub Category dropdown list, and enter “3.00” in the Unit Cost field.

For our training purposes, we will leave the rest of the settings under the Main Tab at their default values.

Now click on the *Product* Tab and enter the required information (the fields with their captions in **bold** text). Select *Product Item* from the Product Type dropdown list, select *Food* from the Receipt Total Type dropdown list, enter “6.95” in the List Price field, and enter “100.00” in the Minimum Markup % field.

For our training purposes, we will leave the rest of the settings under the Product Tab at their default values.

When finished, click the *New* button to save the product item you just entered and begin a new one (See Figure 24-1).

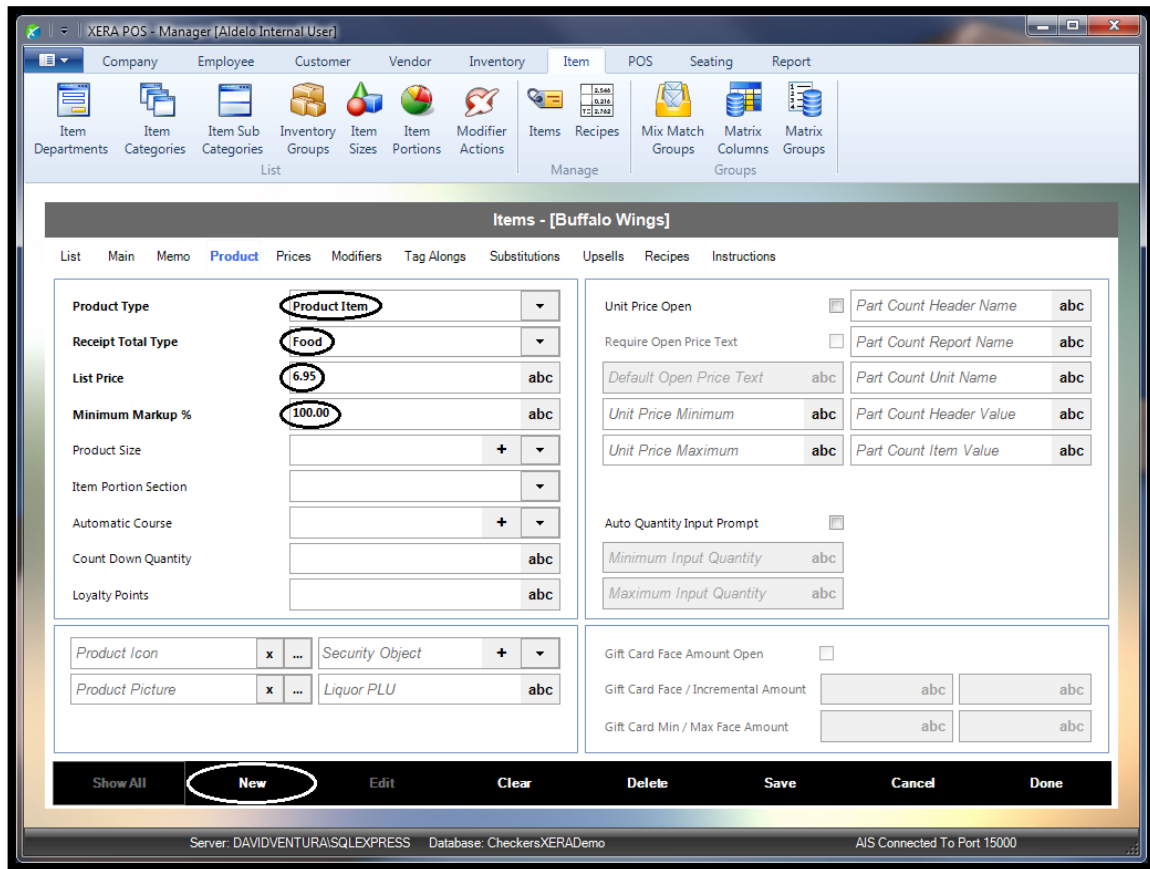


Figure 24-1

Now enter the rest of these items as listed in the following table:

Item Name	Is Product Item	Item Department	Item Category	Item Sub Category	Unit Cost	Product Type	Receipt Total Type	List Price	Minimum Markup %
Buffalo Wings	✓	Food	Appetizers	Meat Appetizers	\$3.00	Product Item	Food	\$6.95	100.00%
Onion Rings	✓	Food	Appetizers	Vegetable Appetizers	\$2.00	Product Item	Food	\$4.95	100.00%
Potato Skins	✓	Food	Appetizers	Potato Appetizers	\$2.00	Product Item	Food	\$4.95	100.00%
Stuffed Jalapeños	✓	Food	Appetizers	Vegetable Appetizers	\$2.00	Product Item	Food	\$4.95	100.00%
French Fries	✓	Food	Side Dishes	Potato Sides	\$1.00	Product Item	Food	\$2.50	100.00%
Steamed Vegetables	✓	Food	Side Dishes	Vegetable Sides	\$1.00	Product Item	Food	\$2.50	100.00%
Baked Potato	✓	Food	Side Dishes	Potato Sides	\$1.50	Product Item	Food	\$3.50	100.00%
Mashed Potatoes	✓	Food	Side Dishes	Potato Sides	\$1.50	Product Item	Food	\$3.50	100.00%
Rice Pilaf	✓	Food	Side Dishes	Rice Sides	\$1.50	Product Item	Food	\$3.50	100.00%
Chef Salad	✓	Food	Salads	Dinner Salads	\$4.00	Product Item	Food	\$8.95	100.00%
Tuna Salad	✓	Food	Salads	Side Salads	\$3.00	Product Item	Food	\$6.95	100.00%
Chicken Salad	✓	Food	Salads	Side Salads	\$3.00	Product Item	Food	\$6.95	100.00%
Pasta Salad	✓	Food	Salads	Side Salads	\$2.00	Product Item	Food	\$4.95	100.00%
New York Steak	✓	Food	Entrees	Meat Dishes	\$8.00	Product Item	Food	\$16.95	100.00%
Maine Lobster	✓	Food	Entrees	Seafood Dishes	\$11.00	Product Item	Food	\$22.95	100.00%
Roasted Chicken	✓	Food	Entrees	Meat Dishes	\$6.00	Product Item	Food	\$12.95	100.00%
Pork Chops	✓	Food	Entrees	Meat Dishes	\$7.00	Product Item	Food	\$14.95	100.00%
Specialty Pizza	✓	Food	Entrees	Specialty Pizza	\$0.00	Product Item	Food	\$0.00	100.00%
Base Pizza	✓	Food	Entrees	Specialty Pizza	\$0.00	Product Item	Food	\$0.00	100.00%
Base Crust	✓	Food	Entrees	Specialty Pizza	\$0.00	Item Modifier	Food	\$0.00	100.00%
Base Topping	✓	Food	Entrees	Specialty Pizza	\$0.00	Item Modifier	Food	\$0.00	100.00%
Vanilla Ice Cream	✓	Food	Desserts	Frozen Desserts	\$1.00	Product Item	Food	\$2.50	100.00%
Cheese Cake	✓	Food	Desserts	Pies	\$1.50	Product Item	Food	\$3.95	100.00%
Apple Pie	✓	Food	Desserts	Pies	\$1.50	Product Item	Food	\$3.95	100.00%
Chocolate Cake	✓	Food	Desserts	Cakes	\$1.50	Product Item	Food	\$3.95	100.00%
Coca-Cola	✓	Beverages	Soft Drinks	Soda	\$0.75	Product Item	Food	\$1.75	100.00%
Diet Coke	✓	Beverages	Soft Drinks	Soda	\$0.75	Product Item	Food	\$1.75	100.00%
Coffee	✓	Beverages	Soft Drinks	Coffee and Tea	\$0.50	Product Item	Food	\$1.75	100.00%
Hot Tea	✓	Beverages	Soft Drinks	Coffee and Tea	\$0.50	Product Item	Food	\$1.75	100.00%

(Continued)

Item Name	Is Product Item	Item Department	Item Category	Item Sub Category	Unit Cost	Product Type	Receipt Total Type	List Price	Minimum Markup %
Heineken	✓	Beverages	Beer	Imports	\$2.00	Bar Item	Bar	\$4.95	100.00%
Budweiser	✓	Beverages	Beer	Domestics	\$1.50	Bar Item	Bar	\$3.95	100.00%
Bloody Mary	✓	Beverages	Liquor	Vodka	\$2.00	Bar Item	Bar	\$4.95	100.00%
Screwdriver	✓	Beverages	Liquor	Vodka	\$2.00	Bar Item	Bar	\$4.95	100.00%
Vodka	✓	Beverages	Liquor	Vodka	\$1.75	Bar Item	Bar	\$4.00	100.00%
Scotch	✓	Beverages	Liquor	Scotch	\$1.75	Bar Item	Bar	\$4.00	100.00%
Butter	✓	Food	Side Dishes	Potato Sides	\$0.25	Item Modifier	Food	\$0.00	0.00%
Sour Cream	✓	Food	Side Dishes	Potato Sides	\$0.25	Item Modifier	Food	\$0.00	0.00%
Chives	✓	Food	Side Dishes	Potato Sides	\$0.10	Item Modifier	Food	\$0.00	0.00%
Italian Dressing	✓	Food	Salads	Dinner Salads	\$0.25	Item Modifier	Food	\$0.00	0.00%
Ranch Dressing	✓	Food	Salads	Dinner Salads	\$0.25	Item Modifier	Food	\$0.00	0.00%
Thousand Island Dressing	✓	Food	Salads	Dinner Salads	\$0.25	Item Modifier	Food	\$0.00	0.00%
Caesar Dressing	✓	Food	Salads	Dinner Salads	\$0.25	Item Modifier	Food	\$0.00	0.00%
Vinaigrette Dressing	✓	Food	Salads	Dinner Salads	\$0.25	Item Modifier	Food	\$0.00	0.00%
Plain Croutons	✓	Food	Salads	Dinner Salads	\$0.15	Item Modifier	Food	\$0.00	0.00%
Cheese Croutons	✓	Food	Salads	Dinner Salads	\$0.15	Item Modifier	Food	\$0.00	0.00%
Bacon Bits	✓	Food	Salads	Dinner Salads	\$0.30	Item Modifier	Food	\$0.00	0.00%
Rare	✓	Food	Entrees	Meat Dishes	\$0.00	Instructional Modifier	Food	\$0.00	0.00%
Medium Rare	✓	Food	Entrees	Meat Dishes	\$0.00	Instructional Modifier	Food	\$0.00	0.00%
Medium	✓	Food	Entrees	Meat Dishes	\$0.00	Instructional Modifier	Food	\$0.00	0.00%
Medium Well	✓	Food	Entrees	Meat Dishes	\$0.00	Instructional Modifier	Food	\$0.00	0.00%
Well Done	✓	Food	Entrees	Meat Dishes	\$0.00	Instructional Modifier	Food	\$0.00	0.00%

When finished, click the *Save* and *Done* buttons to save the last item entered and exit the Add Item screen.

Recipes

Reserved for future use.

Chapter 25 — Item Groups

Mix Match Groups

Mix Match Groups allow the management to organize items into logical groups for the purpose of creating discount groups, upsell prompt lists, etc. Here we will create a mix match group that allows the customer to receive a free soft drink with the purchase of an appetizer.

In Mix Match Groups, click on the *New* button to display the Mix Match Groups – [Add New Record] screen. Enter “Appetizers” in the Mix Match Group Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the mix match group and begin a new one (See Figure 25-1).

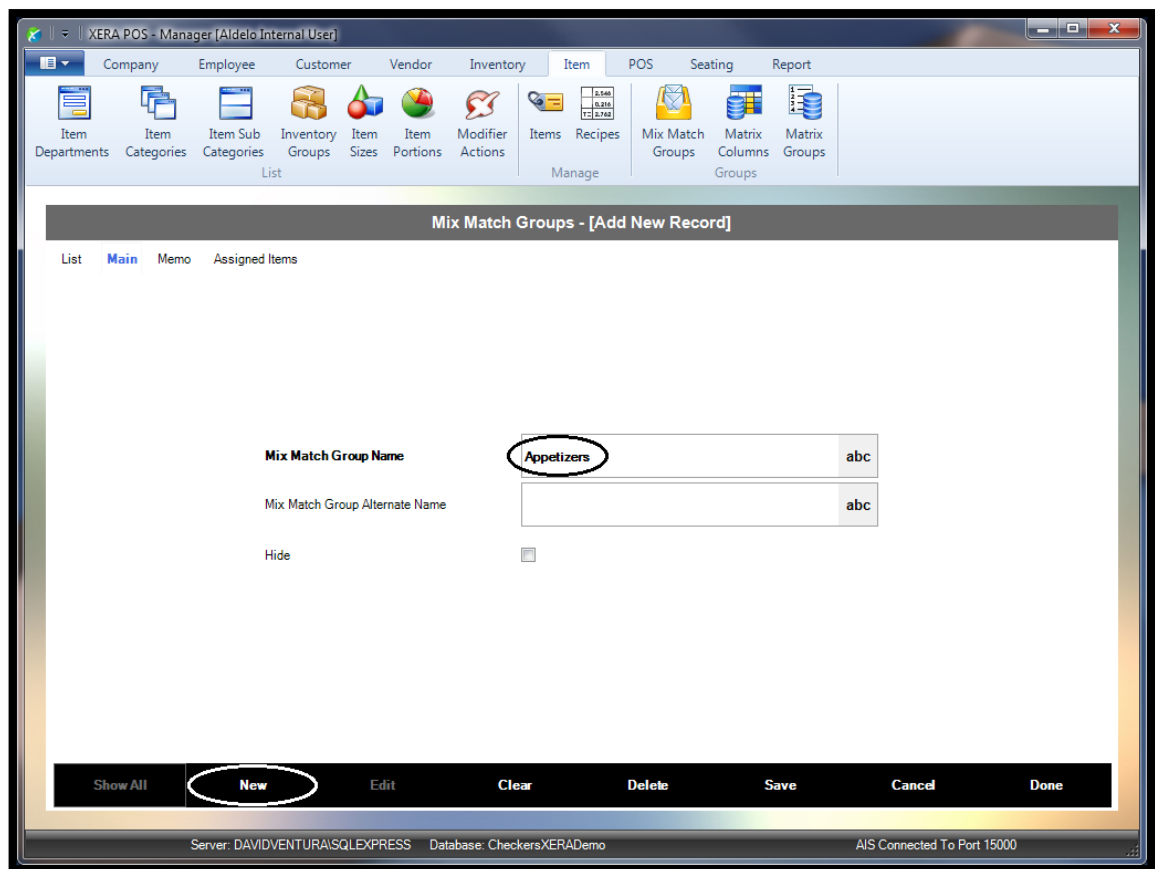


Figure 25-1

Now enter the rest of these mix match groups as listed in the following table:

Mix Match Group Name
Appetizers
Free Soda with Appetizer

When finished, click the *Save* button to save the last mix match group entered.

Now click on the *List* Tab to display the list of mix match group names. Double-click on *Appetizers* to display the group under the Main Tab. Next, select the *Assigned Items* Tab by clicking on it and then click the *New Assignment* button.

In the Mix Match Item field on the right side of the screen, click the *ellipsis* button (...) to display the list of mix match items from which to choose. Select the *Buffalo Wings* item by clicking on it and then click the *Select* button (See Figure 25-2).

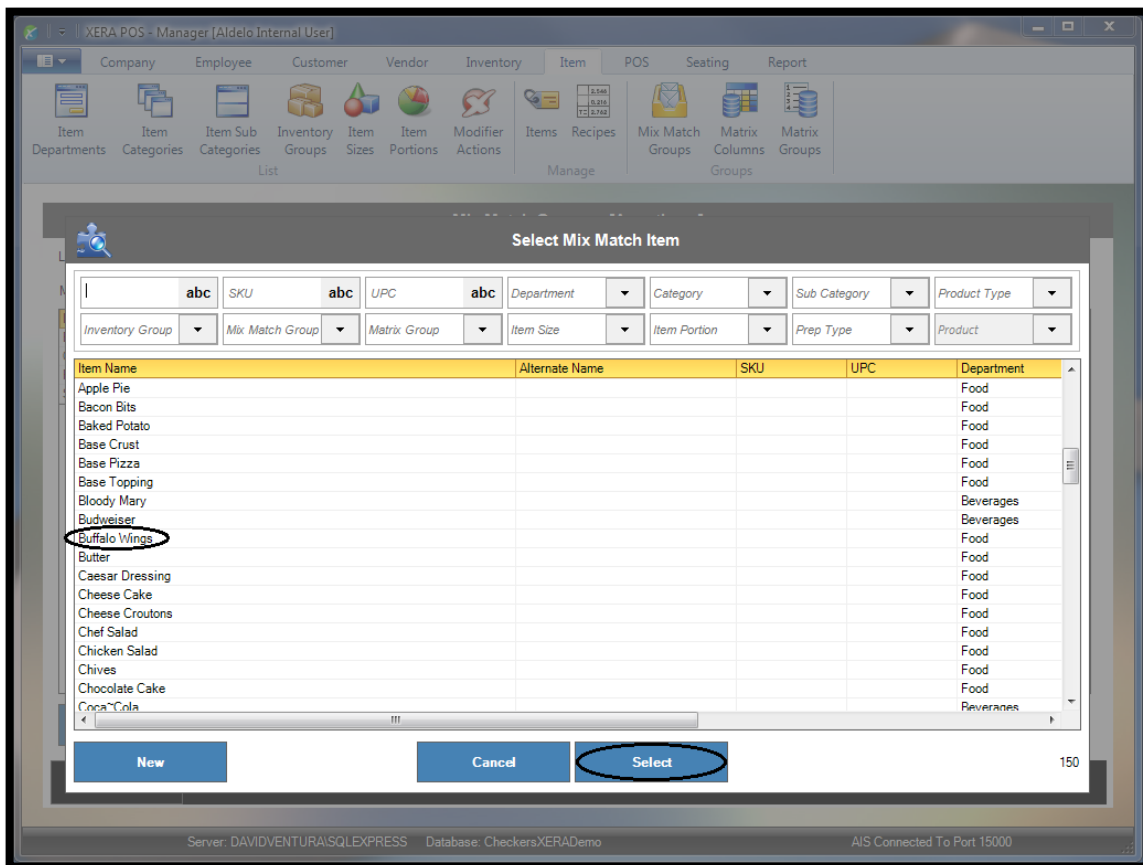


Figure 25-2

Now enter the rest of these mix match items as listed in the following table:

Mix Match Group Name	Mix Match Item Name
Appetizers	Buffalo Wings
Appetizers	Onion Rings
Appetizers	Potato Skins
Appetizers	Stuffed Jalapeños
Free Soda with Appetizer	Coca-Cola
Free Soda with Appetizer	Diet Coke

When finished, click the *Cancel* button to exit the Select Mix Match Item screen.

Matrix Columns

Matrix Columns are created and used in Matrix Groups. Matrix columns allow the user to create different categories of items and use them to create individual menu items exponentially.

For example, when creating pizzas, matrix columns may be created for the pizza size, the pizza crust, and the specialty pizza types that are available. If there are five pizza sizes, five pizza crusts, and twelve specialty pizza types available, then there are 300 unique pizzas available to the customer ($5 \times 5 \times 12 = 300$). By creating the three matrix columns described above, the user only needs to create 22 matrix column entries ($5 + 5 + 12 = 22$), rather than 300 individual pizza items.

Matrix column items may be comprised of groups of modifier actions, item sizes, item portions, or simply plain text.

In Matrix Columns, click on the *New* button to display the Matrix Columns – [Add New Record] screen. Enter “Pizza Type” in the Matrix Column Name field.

Next, click the *down arrow* button to the right of the Matrix Column Source dropdown field and select *Plain Text* by clicking directly on the entry with your mouse.

When finished, click the *New* button to save the matrix column you just created and enter a new one (See Figure 25-3).

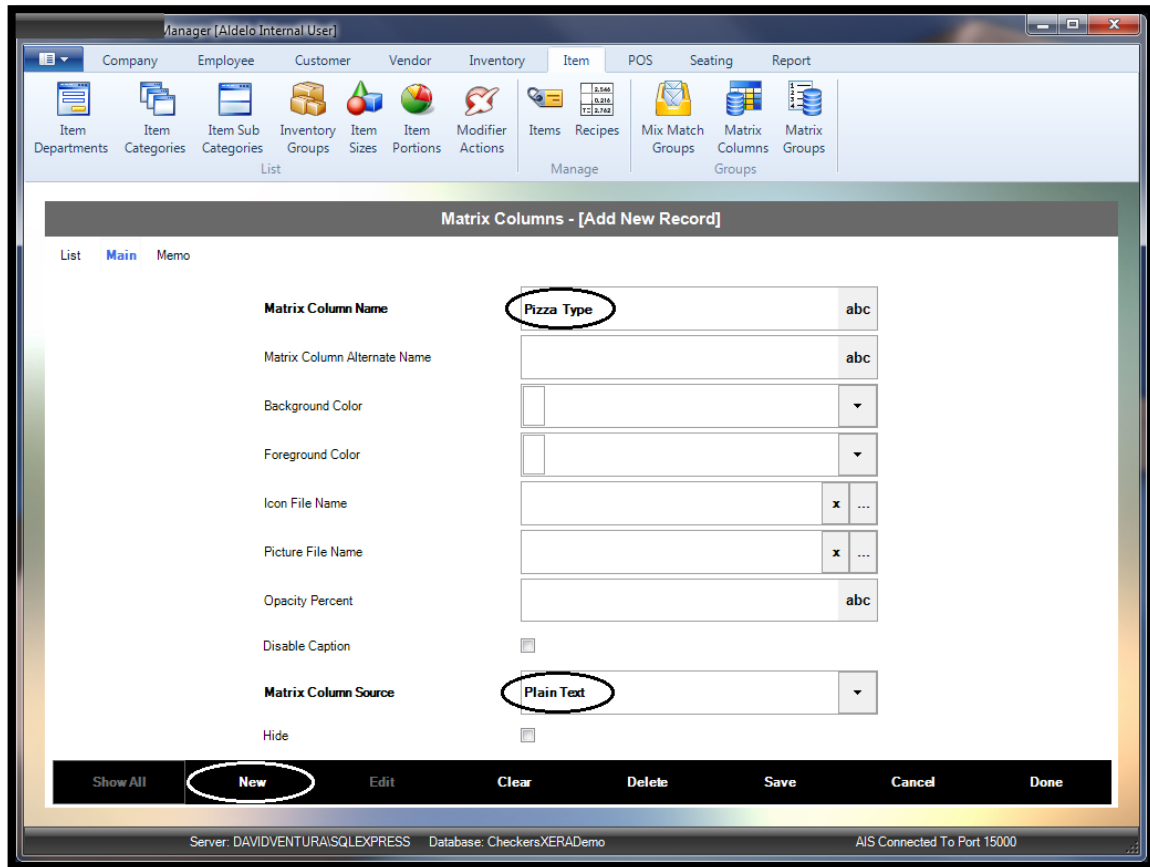


Figure 25-3

Now enter the rest of these matrix columns as listed in the following table:


Matrix Column Name	Matrix Column Source
Pizza Type	Plain Text
Pizza Size	Item Size
Pizza Portions	Item Portion
Pizza Crust	Plain Text
Pizza Toppings	Plain Text
Topping Actions	Modifier Action

When finished, click the *Save* and *Done* buttons to save the last matrix column entered and exit the Add Matrix Column screen.

Matrix Groups

Matrix Groups are used to greatly reduce the amount of manual information entry required for the creation of unique menu items where the menu items share many of their attributes. A matrix group is created and up to five matrix columns are assigned to the matrix group. For each attribute in matrix column 1, an individual menu item may be created for each of the attributes listed in matrix column 2. This process is repeated and an individual menu item may be created for each of the attributes listed in matrix columns 3, 4, and 5.

In Matrix Groups, click on the *New* button to display the Matrix Groups – [Add New Record] screen. Enter “Pizza Type” in the Matrix Group Name field. We will leave the rest of the settings under the Main Tab at their default values.


Now click on the *Matrix* Tab. Under Matrix Column 1, click the *down arrow* button to the right of the blank field just below the column label and select *Pizza Size* from the list. Next, click the *down arrow* button to the right of the blank field directly below the field populated by the words “Pizza Size” to view the different sizes that were created previously. Select *Small* by clicking directly on it and then click the *plus* button  to the right of the field to add “Small” to the list of pizza sizes.

Continue in this manner and add “Medium,” “Large,” and “Extra Large” to this same Pizza Size column. When finished, click the *Save* button to save what you have entered thus far.

When you finish Matrix Column 1, follow the same procedure and add Pizza Portions to Matrix Column 2. For our training purposes, we will add only “Whole” and “Halves” to the Pizza Portions column.

When finished, click the *Save* button to save what you have entered thus far.

Now we will add Pizza Types to Matrix Column 3. Since the Pizza Type Matrix Column Source is “Plain Text,” it is handled differently than the first two columns.

Under Matrix Column 3, click the *down arrow* button to the right of the blank field just below the column label and select *Pizza Type* from the list. Next, click inside the blank Column Value entry field, enter “Cheese Pizza,” and then click the *plus* button  to the right of the Column Value entry field. This adds the value “Cheese” to the Pizza Type matrix column. Next, add “Pepperoni Pizza” to Matrix Column 3 by following the same procedure.

When finished, click the *New* button to save the matrix group you just created and enter a new one (See Figure 25-4).

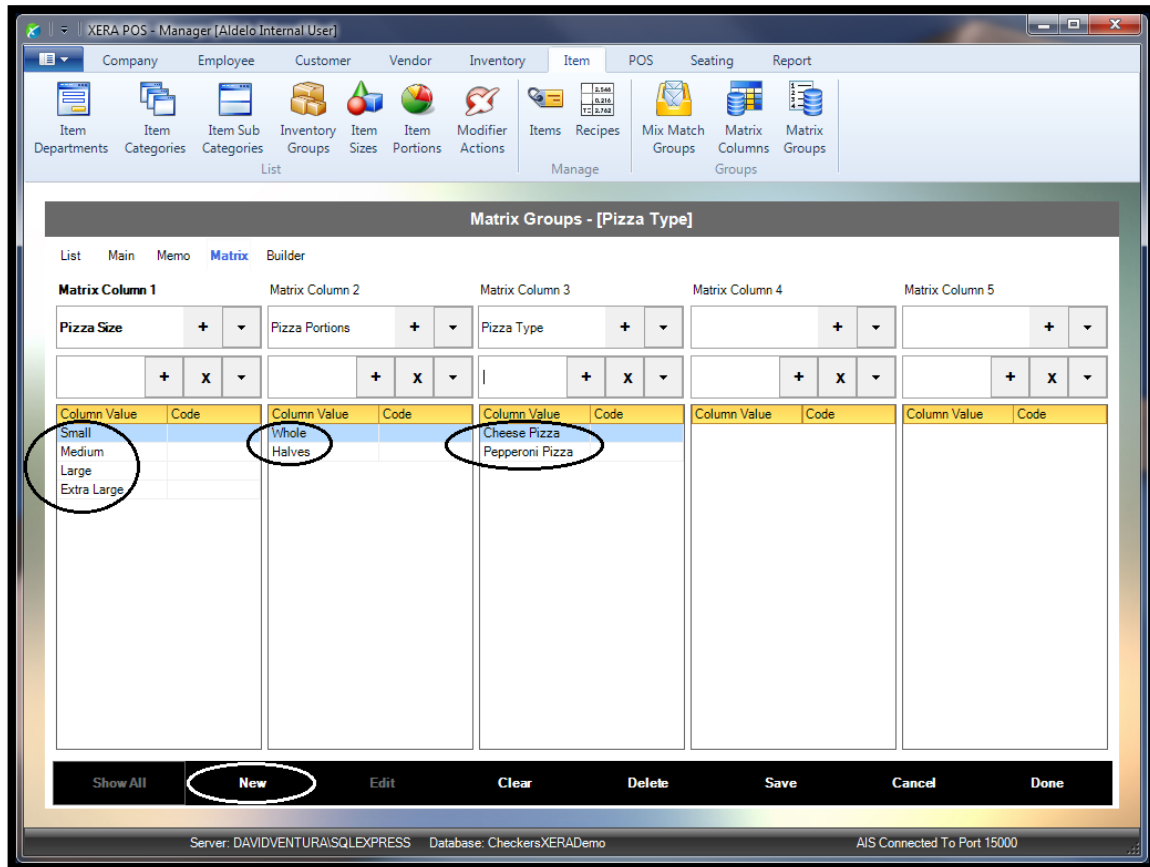


Figure 25-4

Now enter the rest of these matrix groups as listed in the following table:

Matrix Group Name	Matrix Column 1	Column 1 Members	Matrix Column 2	Column 2 Members	Matrix Column 3	Column 3 Members	Matrix Column 4	Column 4 Members
Pizza Type	Pizza Size		Pizza Portions		Pizza Type			
		Small		Whole		Cheese Pizza		
		Medium		Halves		Pepperoni Pizza		
		Large						
		Extra Large						
Pizza Crusts	Pizza Size		Pizza Crust					
		Small		Chicago Style Crust				
		Medium		New York Style Crust				
		Large						
		Extra Large						
Pizza Toppings	Topping Actions		Pizza Size		Pizza Portions		Pizza Toppings	
		Add		Small		Whole		Sausage
		Double		Medium		Halves		Mushrooms
				Large				Onions
				Extra Large				Black Olives

When finished, click the *Save* button to save the last matrix group entered. Next, click the *List* Tab, double-click on *Pizza Type*, and then click the *Builder* Tab.

Click the *Build* button to create your menu items with the matrix system. When prompted to select the base item for the matrix, select *Base Pizza* from the displayed list by clicking directly on it and then clicking the *Select* button. When prompted, click the *YES ... Create 16 New Matrix Items Now* button to confirm the action.

Opening the Items list reveals that sixteen unique pizza items have been created automatically by the matrix system (See Figure 25-5).

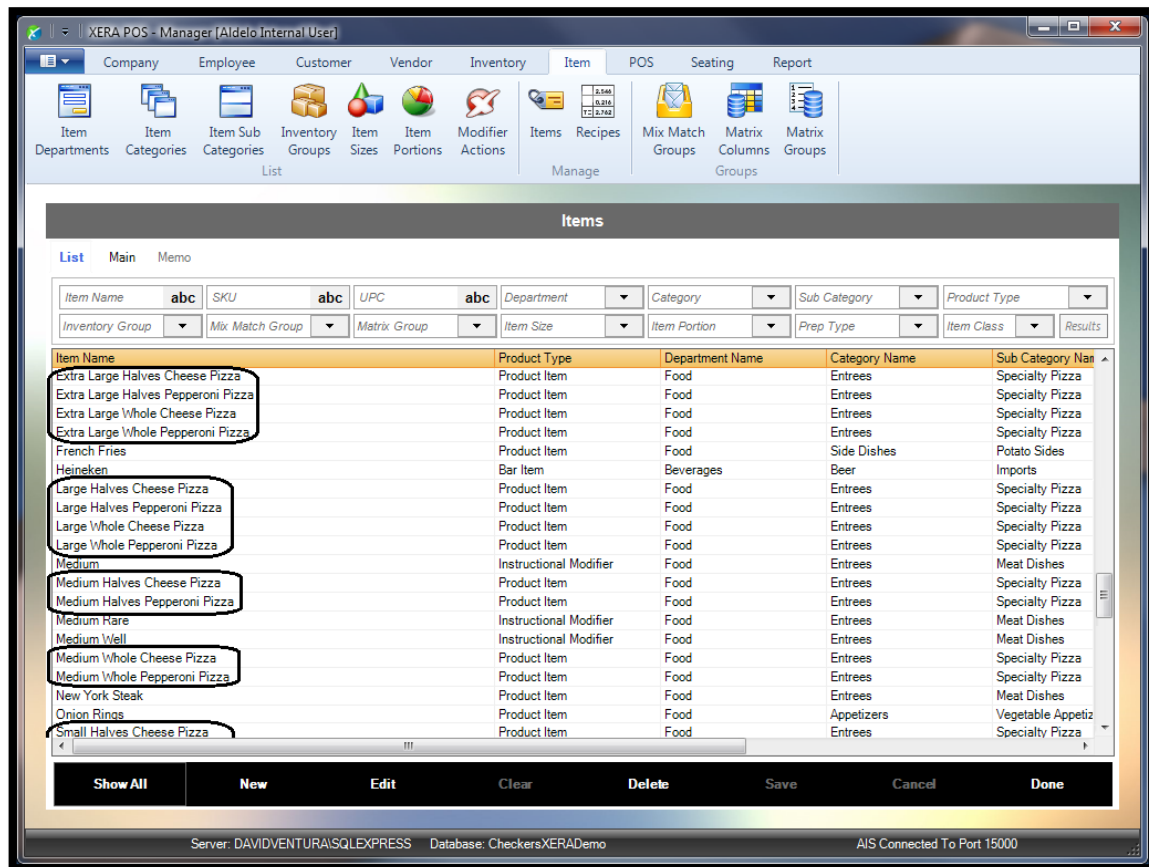


Figure 25-5

Next, return to Matrix Groups and, following this same procedure, build the remaining two groups (Pizza Crusts and Pizza Toppings). When prompted to select the base item for the each matrix, select *Base Crust* and *Base Topping*, respectively.

Now return to *Matrix Groups*, click on the *List* Tab, double-click on *Pizza Type*, and then click on the *Builder* Tab. For the first item in the list (Small Whole Cheese Pizza), enter \$3.00 in the Unit Cost column and \$8.00 in the Default Price column. If the columns are not visible, adjust the scroll bar near the bottom of the screen until the two columns come into view. Click directly on the current price with your mouse, enter the new value, and then click away from the field.

When finished, click the *Save* button to save the prices for the item (See Figure 25-6).

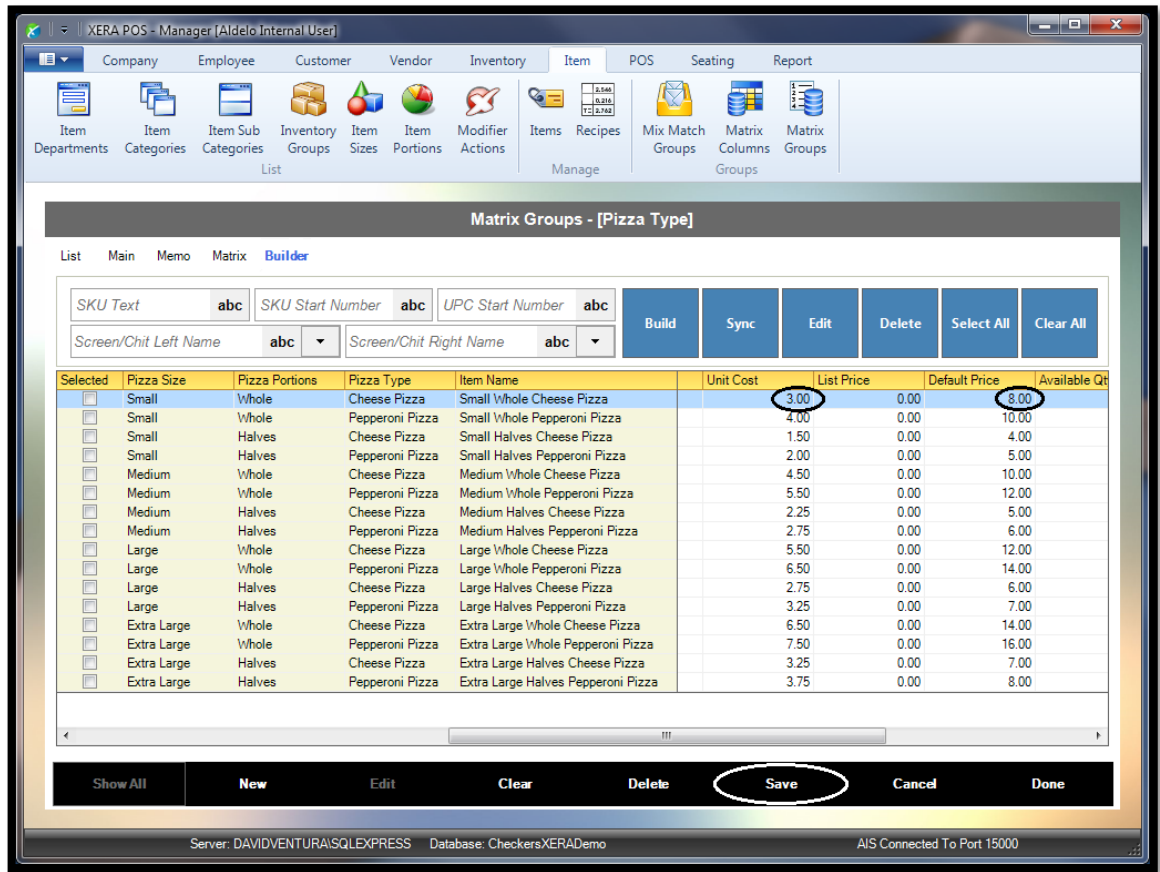


Figure 25-6

Now enter the rest of these prices as listed in the following table:

Item Name	Unit Cost	Default Price
Small Whole Cheese Pizza	\$3.00	\$8.00
Small Whole Pepperoni Pizza	\$4.00	\$10.00
Small Halves Cheese Pizza	\$1.50	\$4.00
Small Halves Pepperoni Pizza	\$2.00	\$5.00
Medium Whole Cheese Pizza	\$4.50	\$10.00
Medium Whole Pepperoni Pizza	\$5.50	\$12.00
Medium Halves Cheese Pizza	\$2.25	\$5.00
Medium Halves Pepperoni Pizza	\$2.75	\$6.00
Large Whole Cheese Pizza	\$5.50	\$12.00
Large Whole Pepperoni Pizza	\$6.50	\$14.00
Large Halves Cheese Pizza	\$2.75	\$6.00
Large Halves Pepperoni Pizza	\$3.25	\$7.00
Extra Large Whole Cheese Pizza	\$6.50	\$14.00
Extra Large Whole Pepperoni Pizza	\$7.50	\$16.00
Extra Large Halves Cheese Pizza	\$3.25	\$7.00
Extra Large Halves Pepperoni Pizza	\$3.75	\$8.00

When finished, be sure to click the *Save* button to save your changes.

Next, click the *List* Tab and then double-click on *Pizza Crusts* to display the matrix group under the Main Tab, and then click the *Builder* Tab. Since there is no extra charge for our pizza crust, no matter which one the customer selects, there is no need to enter anything under the Unit Cost and Default Price columns; however, we want to change the text that appears on the screen, the receipt, and the kitchen chit to eliminate the size from the description. This prevents the size from being displayed multiple times.

For the first item in the list (Small Chicago Style Crust), enter “Chicago Style Crust” in the Screen Name column, the Receipt Name column, and the Chit Name column. If the columns are not visible, adjust the scroll bar near the bottom of the screen until the three columns come into view. Click directly on the blank field with your mouse, enter the new value, and then click away from the field.

When finished, click the *Save* button to save the name changes for the item (See Figure 25-7).

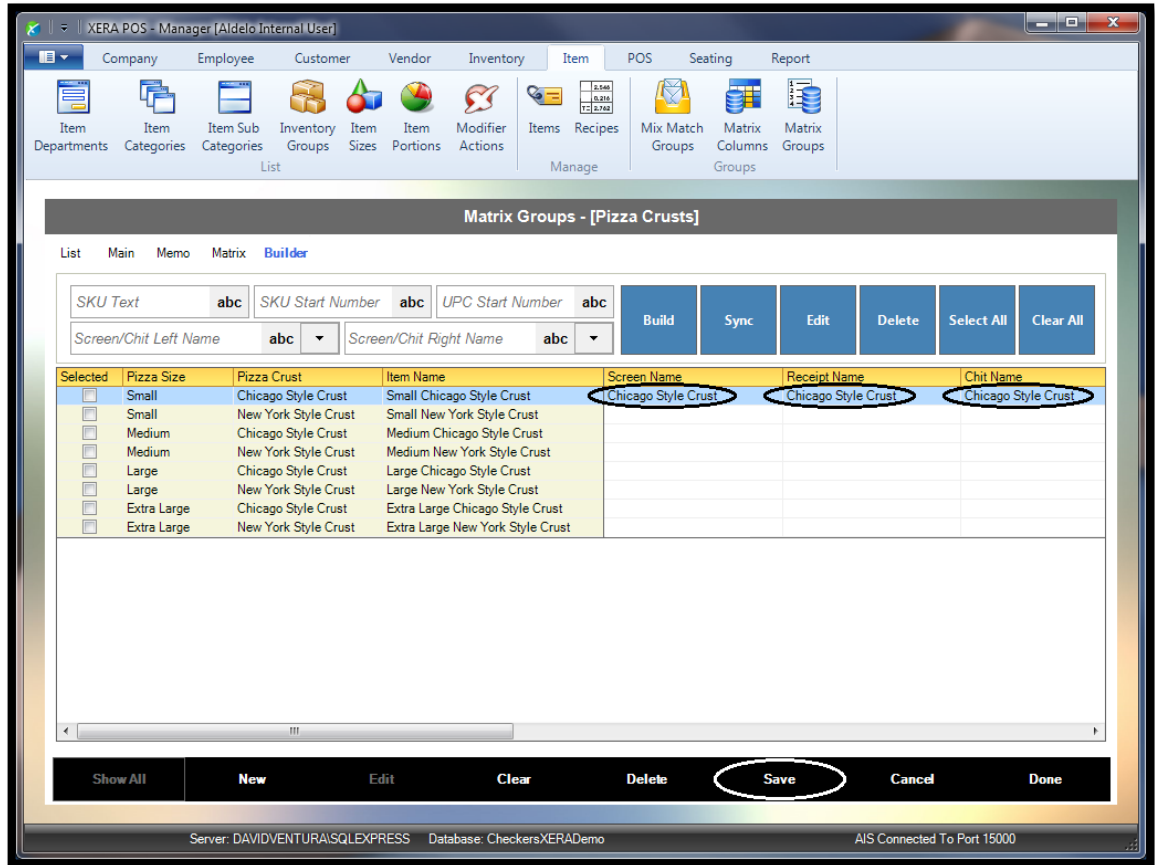


Figure 25-7

Now enter the rest of these name changes as listed in the following table:

Item Name	Screen Name Receipt Name Chit Name
Small Chicago Style Crust	Chicago Style Crust
Small New York Style Crust	New York Style Crust
Medium Chicago Style Crust	Chicago Style Crust
Medium New York Style Crust	New York Style Crust
Large Chicago Style Crust	Chicago Style Crust
Large New York Style Crust	New York Style Crust
Extra Large Chicago Style Crust	Chicago Style Crust
Extra Large York Style Crust	New York Style Crust

When finished, be sure to click the *Save* button to save your changes.

Finally, click on the *List* Tab and then double-click on *Pizza Toppings* to display the Pizza Toppings matrix group under the *Main* Tab. Now click the *Builder* Tab. For the pizza toppings, we must enter the topping prices and change the topping names.

For the first item in the list (Add Small Whole Sausage), enter “Add Sausage” in the Screen Name column, the Receipt Name column, and the Chit Name column (See Figure 25-8).

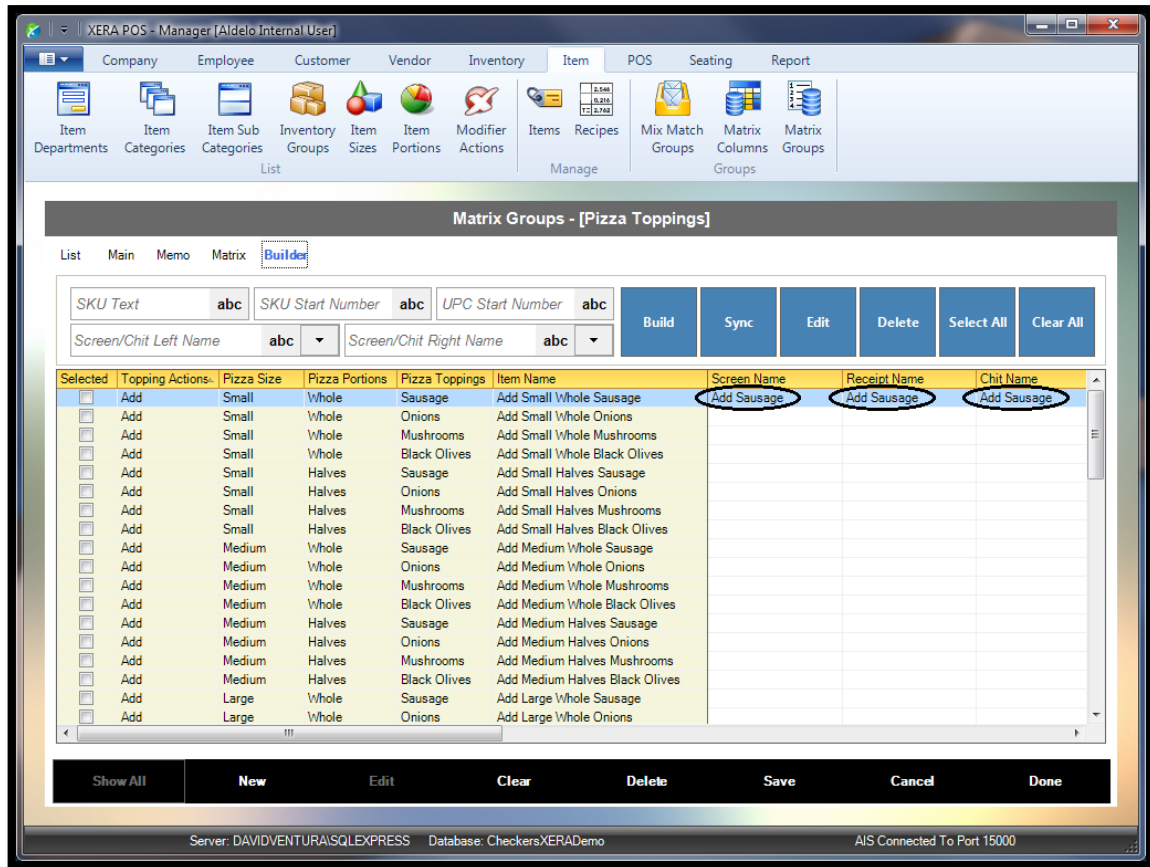


Figure 25-8

Next, enter “0.45” in the Unit Cost field and “0.90” in the Default Price field (See Figure 25-9).

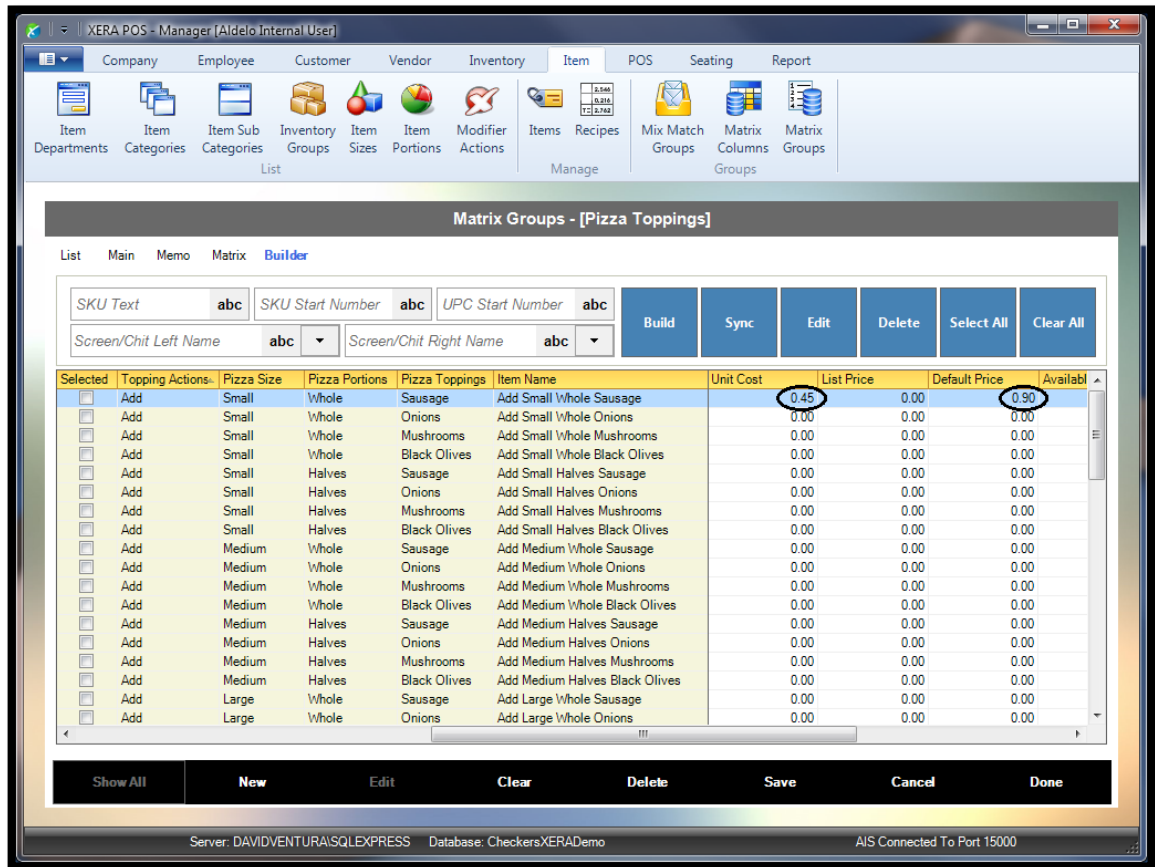


Figure 25-9

Now enter the rest of the name changes and prices as listed in the following table:

Item Name	Product Screen Name Product Receipt Name Product Chit Name	Unit Cost	Default Price
Add Small Whole Sausage	Add Sausage	\$0.45	\$0.90
Add Small Whole Mushrooms	Add Mushrooms	\$0.45	\$0.90
Add Small Whole Onions	Add Onions	\$0.45	\$0.90
Add Small Whole Black Olives	Add Black Olives	\$0.45	\$0.90
Add Small Halves Sausage	Add Sausage	\$0.23	\$0.45
Add Small Halves Mushrooms	Add Mushrooms	\$0.23	\$0.45
Add Small Halves Onions	Add Onions	\$0.23	\$0.45
Add Small Halves Black Olives	Add Black Olives	\$0.23	\$0.45
Add Medium Whole Sausage	Add Sausage	\$0.60	\$1.20
Add Medium Whole Mushrooms	Add Mushrooms	\$0.60	\$1.20
Add Medium Whole Onions	Add Onions	\$0.60	\$1.20
Add Medium Whole Black Olives	Add Black Olives	\$0.60	\$1.20
Add Medium Halves Sausage	Add Sausage	\$0.30	\$0.60
Add Medium Halves Mushrooms	Add Mushrooms	\$0.30	\$0.60
Add Medium Halves Onions	Add Onions	\$0.30	\$0.60
Add Medium Halves Black Olives	Add Black Olives	\$0.30	\$0.60
Add Large Whole Sausage	Add Sausage	\$0.75	\$1.50
Add Large Whole Mushrooms	Add Mushrooms	\$0.75	\$1.50
Add Large Whole Onions	Add Onions	\$0.75	\$1.50
Add Large Whole Black Olives	Add Black Olives	\$0.75	\$1.50
Add Large Halves Sausage	Add Sausage	\$0.38	\$0.75
Add Large Halves Mushrooms	Add Mushrooms	\$0.38	\$0.75
Add Large Halves Onions	Add Onions	\$0.38	\$0.75
Add Large Halves Black Olives	Add Black Olives	\$0.38	\$0.75
Add Extra Large Whole Sausage	Add Sausage	\$0.90	\$1.80
Add Extra Large Whole Mushrooms	Add Mushrooms	\$0.90	\$1.80
Add Extra Large Whole Onions	Add Onions	\$0.90	\$1.80
Add Extra Large Whole Black Olives	Add Black Olives	\$0.90	\$1.80
Add Extra Large Halves Sausage	Add Sausage	\$0.45	\$0.90
Add Extra Large Halves Mushrooms	Add Mushrooms	\$0.45	\$0.90
Add Extra Large Halves Onions	Add Onions	\$0.45	\$0.90
Add Extra Large Halves Black Olives	Add Black Olives	\$0.45	\$0.90
Double Small Whole Sausage	Double Sausage	\$0.90	\$1.80
Double Small Whole Mushrooms	Double Mushrooms	\$0.90	\$1.80
Double Small Whole Onions	Double Onions	\$0.90	\$1.80
Double Small Whole Black Olives	Double Black Olives	\$0.90	\$1.80
Double Small Halves Sausage	Double Sausage	\$0.45	\$0.90
Double Small Halves Mushrooms	Double Mushrooms	\$0.45	\$0.90
Double Small Halves Onions	Double Onions	\$0.45	\$0.90
Double Small Halves Black Olives	Double Black Olives	\$0.45	\$0.90

(Continued)

Item Name	Product Screen Name Product Receipt Name Product Chit Name	Unit Cost	Default Price
Double Medium Whole Sausage	Double Sausage	\$1.20	\$2.40
Double Medium Whole Mushrooms	Double Mushrooms	\$1.20	\$2.40
Double Medium Whole Onions	Double Onions	\$1.20	\$2.40
Double Medium Whole Black Olives	Double Black Olives	\$1.20	\$2.40
Double Medium Halves Sausage	Double Sausage	\$0.60	\$1.20
Double Medium Halves Mushrooms	Double Mushrooms	\$0.60	\$1.20
Double Medium Halves Onions	Double Onions	\$0.60	\$1.20
Double Medium Halves Black Olives	Double Black Olives	\$0.60	\$1.20
Double Large Whole Sausage	Double Sausage	\$1.50	\$3.00
Double Large Whole Mushrooms	Double Mushrooms	\$1.50	\$3.00
Double Large Whole Onions	Double Onions	\$1.50	\$3.00
Double Large Whole Black Olives	Double Black Olives	\$1.50	\$3.00
Double Large Halves Sausage	Double Sausage	\$0.75	\$1.50
Double Large Halves Mushrooms	Double Mushrooms	\$0.75	\$1.50
Double Large Halves Onions	Double Onions	\$0.75	\$1.50
Double Large Halves Black Olives	Double Black Olives	\$0.75	\$1.50
Double Extra Large Whole Sausage	Double Sausage	\$1.80	\$3.60
Double Extra Large Whole Mushrooms	Double Mushrooms	\$1.80	\$3.60
Add Extra Large Whole Onions	Double Onions	\$1.80	\$3.60
Double Extra Large Whole Black Olives	Double Black Olives	\$1.80	\$3.60
Double Extra Large Halves Sausage	Double Sausage	\$0.90	\$1.80
Double Extra Large Halves Mushrooms	Double Mushrooms	\$0.90	\$1.80
Add Extra Large Halves Onions	Double Onions	\$0.90	\$1.80
Double Extra Large Halves Black Olives	Double Black Olives	\$0.90	\$1.80

When finished, click the *Save* and *Done* buttons button to save your changes and exit the Matrix Groups screen.

Chapter 26 — POS Prep

Device Types

Device Types are the types of devices that you use in your business that are connected to your computer network in relation to your XERA® POS software. This includes such device types as printers, pole displays, magnetic stripe readers (MSR), barcode readers, magnetic ink character recognition (MICR) readers, coin dispensers, weight scales, etc.

In Device Types, click on the *New* button to display the Device Types – [Add New Record] screen. Enter “Cashier Station Printer” in the POS Device Type Name field.

Next, click the *down arrow* button to the right of the POS Device Type field and select *POS Printer & KDS* from the list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the POS device you just entered and begin a new one (See Figure 26-1).

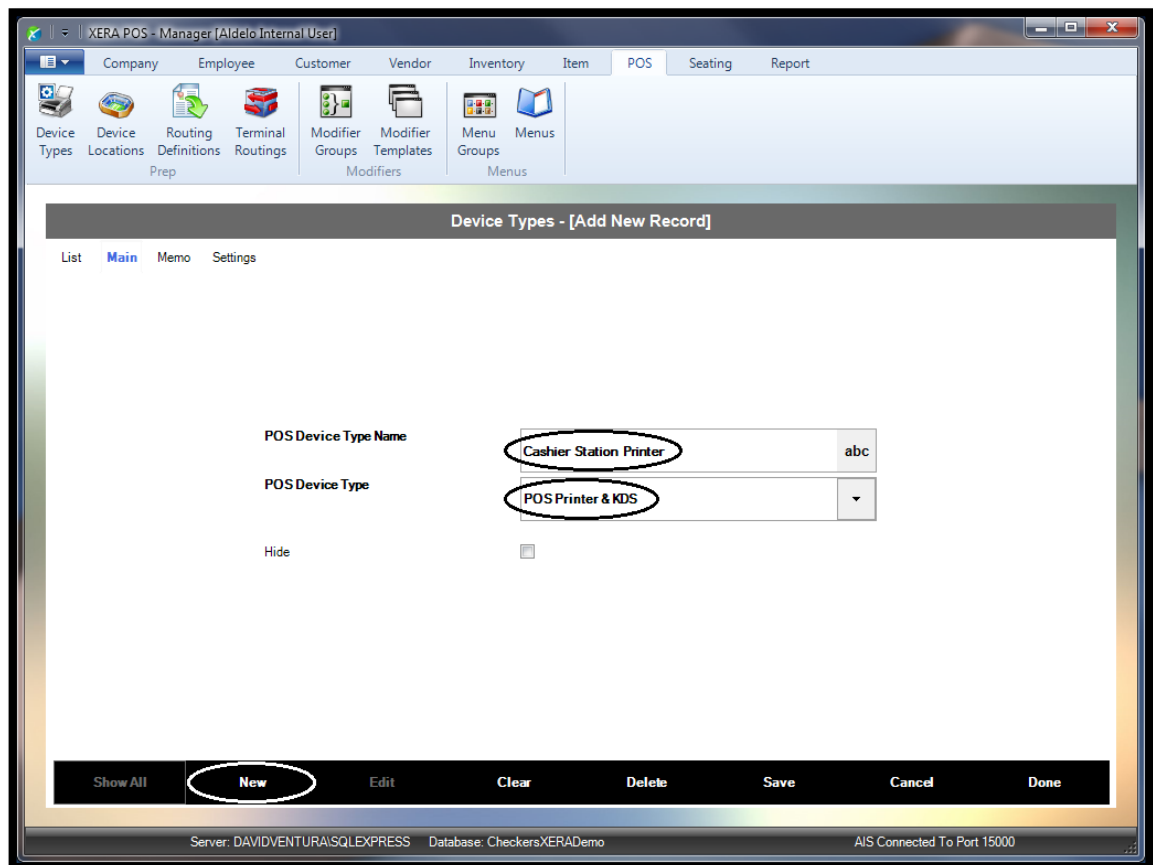


Figure 26-1

Now enter the rest of these POS devices as listed in the following table:

POS Device Type Name	POS Device Type
Cashier Station Printer	POS Printer & KDS
Pole Display	Pole Display
MSR Device	MSR
Cash Drawer	Cash Drawer
Cashier Scale	Weight Scale
MICR Device	MICR
Kitchen Printer	POS Printer & KDS
Report Printer	Fiscal Printer

When finished, click the *Save* and *Done* buttons to save the last POS device entered and exit the Add POS Device screen.

Device Locations

The places in your business where your POS devices are located must be setup in the XERA® POS Manager application. Each location may have only a single POS device assigned to it. To assign additional devices to a general location, you must create a unique specific location for each device that is within the general location.

In Device Locations, click on the *New* button to display the Device Locations – [Add New Record] screen. Enter “Bar” in the Device Location Name field. Next, click the *down arrow* button to the right of the Cost Center field and select *Bar* from the list. In the POS Device URL field, we will enter xxx.xxx.xxx.xxx for each of our device locations. Finally, click the *down arrow* button to the right of the POS Device field and select *Kitchen Printer* from the list.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the device location you just entered and begin a new one (See Figure 26-2).

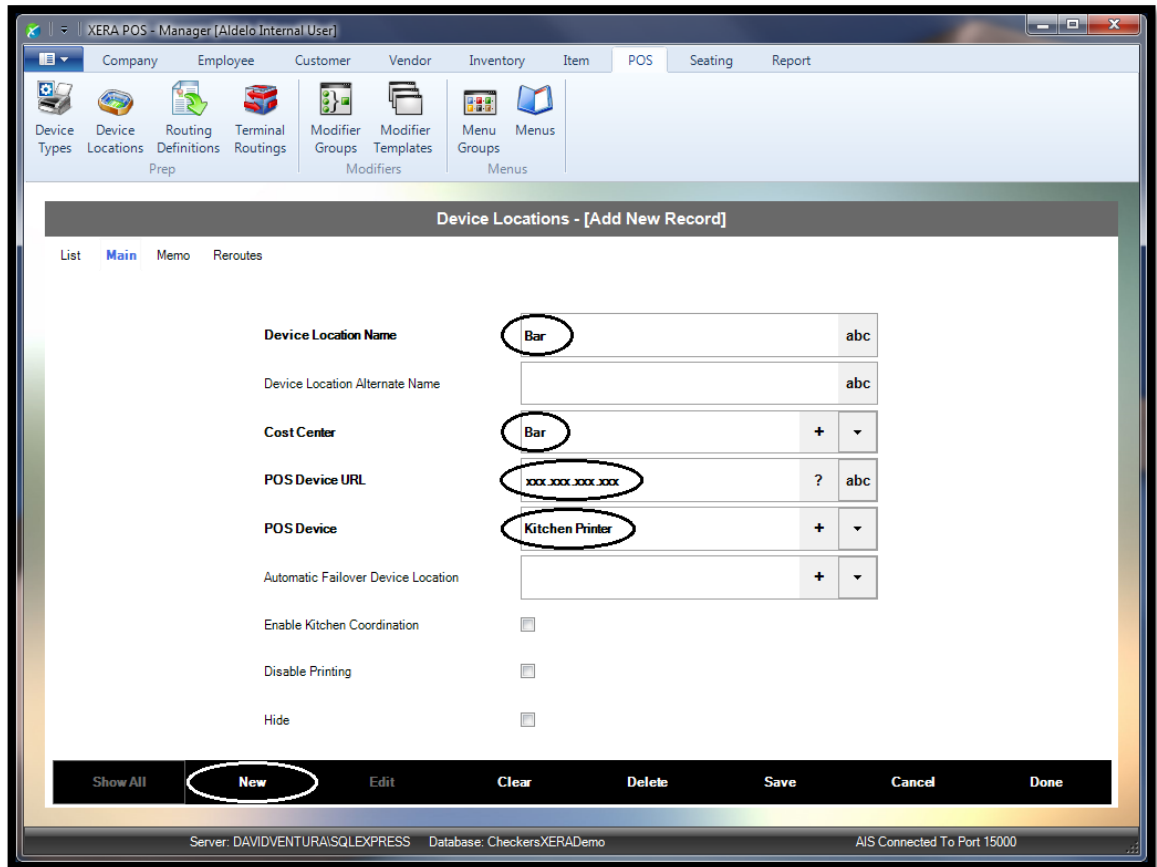


Figure 26-2

Now enter the rest of these device locations as listed in the following table:

Device Location Name	Cost Center	POS Device URL	POS Device
Bar	Bar	xxx.xxx.xxx.xxx	Kitchen Printer
Beverage Station	Beverage Station	xxx.xxx.xxx.xxx	Kitchen Printer
Dessert Station	Dessert Station	xxx.xxx.xxx.xxx	Kitchen Printer
Salad Station	Salad Station	xxx.xxx.xxx.xxx	Kitchen Printer
Grill Station	Grill Station	xxx.xxx.xxx.xxx	Kitchen Printer
Appetizer Station	Appetizer Station	xxx.xxx.xxx.xxx	Kitchen Printer
Kitchen Station 1	Kitchen	xxx.xxx.xxx.xxx	Kitchen Printer
Kitchen Station 2	Kitchen	xxx.xxx.xxx.xxx	Kitchen Printer
Cashier Station	Cashier Station	xxx.xxx.xxx.xxx	Cashier Station Printer
Cashier Cash Drawer 1	Cashier Station	xxx.xxx.xxx.xxx	Cash Drawer
Cashier Cash Drawer 2	Cashier Station	xxx.xxx.xxx.xxx	Cash Drawer
Gift Shop	Gift Shop	xxx.xxx.xxx.xxx	Cashier Station Printer
Gift Shop Cash Drawer 1	Gift Shop	xxx.xxx.xxx.xxx	Cash Drawer
Gift Shop Cash Drawer 2	Gift Shop	xxx.xxx.xxx.xxx	Cash Drawer

The Reroutes Tab allows you to choose a backup device location for the jobs sent to certain devices in case of a failure of the primary device. To do so, double-click a device location under the List Tab to select it and then click on the *Reroutes* Tab.

Next, click the *New Assignment* button and then select the Device Location Reroute Target from the dropdown list. Save the reroute assignment when finished.

For our training purposes, we will not make any reroute assignments.

When finished, click the *Save* and *Done* buttons to save the last device location entered and exit the Add Device Location screen.

Routing Definitions

A Routing Definition is defined as the location to which an ordered item is sent for preparation by the POS system.

For example, if a customer orders a side salad, grilled salmon, and a glass of beer, then the side salad should be routed to the salad preparation station, the grilled salmon should be routed to the grilling station, and the beer should be routed to the bar. The employee at each station prepares the respective menu item for pickup by the waitperson, who then serves it to the customer.

In Routing Definitions, click on the *New* button to display the Routing Definitions [Add New Record] screen. Enter "Bar" in the Routing Definition Name field. Next, select the *Override Terminal Routing* checkbox.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the routing definition you just entered and begin a new one (See Figure 26-3).

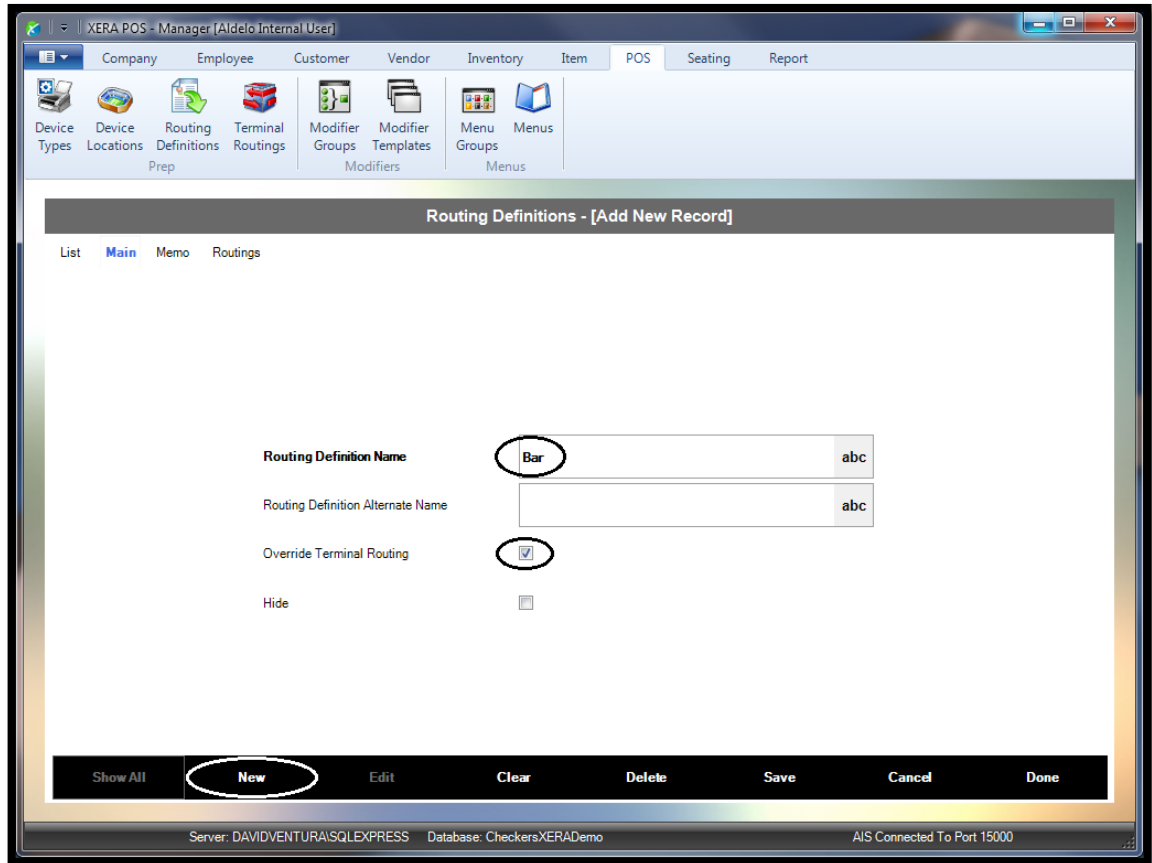


Figure 26-3

Now enter the rest of these prep routings as listed in the following table:

Prep Routing Name	Override Terminal Routing
Bar	✓
Beverage Station	✓
Dessert Station	✓
Salad Station	✓
Grill Station	✓
Appetizer Station	✓
Kitchen Station 1	✓
Kitchen Station 2	✓
None	-

When finished, click the *Save* button.

The *Routings* Tab allows you to assign the appropriate prep types to the routing definitions that you just created. Click the *List* Tab to display the list of previously created routing definitions and double-click on *Bar* to display it under the *Main* Tab.

Next, click the *Routings* Tab. On the left side of the screen, under *Alcoholic Beverages*, click on >>> *Click To Show Available Device Locations* >>> to display a list of device locations from which to choose. Under *Bar Items* on the right side of the screen, double-click on <<< *Double Click to Assign Device Location* <<< to route alcoholic beverage orders to the *Bar*.

In addition, you should always assign the *Null Printer* device location to each of your prep types. This ensures that items not otherwise printed via the assigned prep routing will still be marked as printed and not cause the system to reprint the chit. This is reflected in the table below.

The prep routing for alcoholic beverages is now complete.

Now complete the rest of these prep routings as listed in the following table:

Prep Type	Prep Routing
Alcoholic Beverages	Bar & Null Printer
Soft Drinks	Beverage Station & Null Printer
Desserts	Dessert Station & Null Printer
Salads	Salad Station & Null Printer
Grill	Grill Station & Null Printer
Appetizers	Appetizer Station & Null Printer
Entrees	Kitchen Station 1 & Null Printer
Side Orders	Kitchen Station 2 & Null Printer
None	Null Printer

When finished, click the *Save* and *Done* buttons to save the last prep routing entered and exit the *Routing Definitions* screen.

Terminal Routings

The *Terminal Routings* feature allows the routing of kitchen chits to be determined based upon order type. Different order types may use different terminal routings.

For example, if a cheeseburger is ordered as a dine-in order, the kitchen chit simply needs to go to the grilling station. However, if a cheeseburger is ordered as a carry out item, in addition to sending the kitchen chit to the grilling station, it might also be necessary to send it to the packaging station.

Please note that the terminal settings must be setup in advance or they do not display on the *Terminal Routings* screen. Terminal settings are covered in a previous section of this manual.

For our training purposes, we will leave the Terminal Routing settings at their default values.

Chapter 27 — POS Modifiers

Modifier Groups

Modifier Groups are defined as collections of related modifiers. The modifier groups are created and then modifier items are assigned to the modifier groups.

For example, a modifier group called “Salad Dressings” might be created and then the modifier items “Caesar,” “Ranch,” “Thousand Island,” “Italian,” and “Vinaigrette” could be assigned to that modifier group. For our Checkers Restaurant, we will create several modifier groups.

In Modifier Groups, click on the *New* button to display the Modifier Groups [Add New Record] screen. Enter “Pizza Crusts” in the Modifier Group Name field, enter “2” in the Grid Rows field, and enter “1” in the Grid Columns field. Next, enter “1” in both the Minimum Selection Quantity field and the Maximum Selection Quantity field on the right side of the screen.

Multiply the Grid Rows value by the Grid Columns value to determine the number of buttons that will appear on the Order Entry screen in the XERA® POS application. Be sure that the number of buttons in the grid is greater than or equal to the number of modifiers that are members of the selected modifier group.

The Minimum Selection Quantity and the Maximum Selection Quantity fields control the number of selections that must be made and may be made, respectively, before the Order Entry screen automatically moves to the next group of choices.

For our training purposes, we will leave the rest of the settings under the Main Tab at their default values.

When finished, click the *New* button to save the modifier group you just entered and begin a new one (See Figure 27-1).

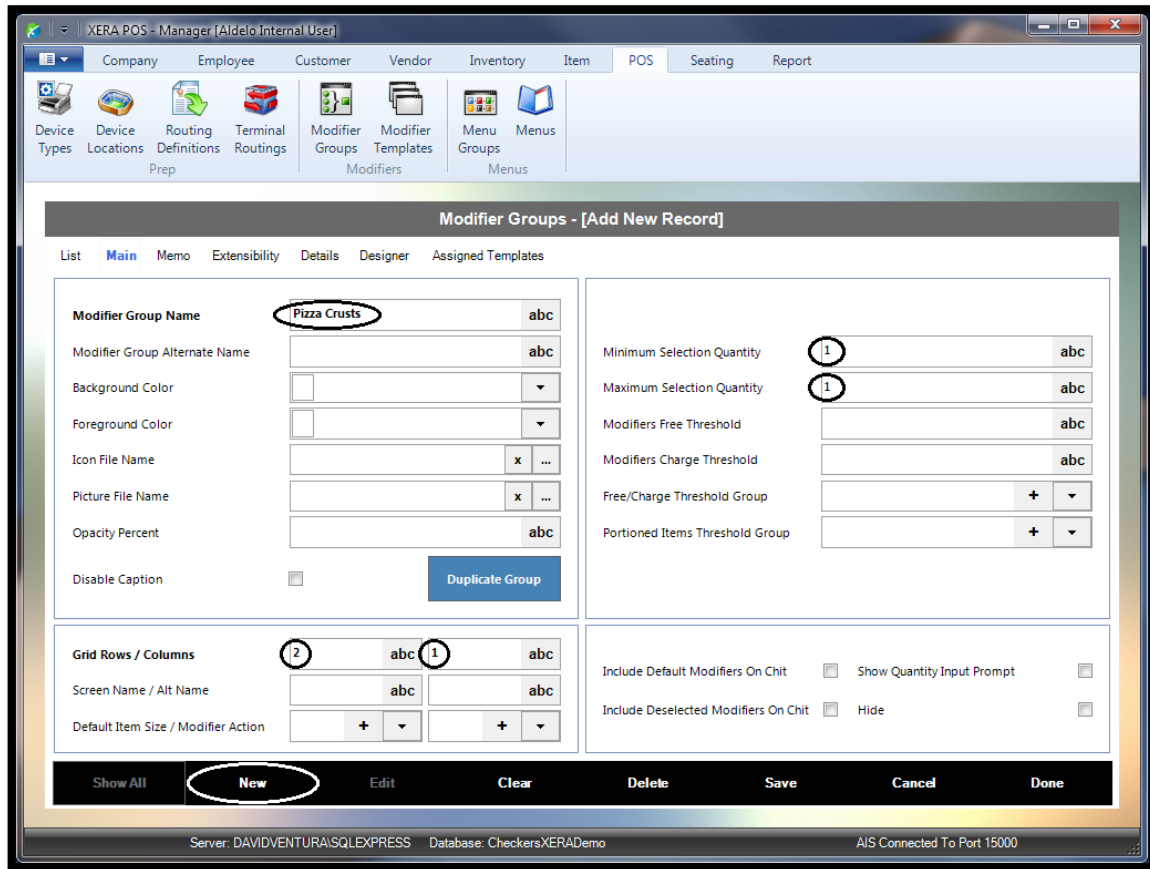


Figure 27-1

Now enter the rest of these modifier groups as listed in the following table:

Modifier Group Name	Grid Rows	Grid Columns	Minimum Selection Quantity	Maximum Selection Quantity
Pizza Crusts	2	1	1	1
Pizza Toppings	2	2	0	4
Specialty Pizzas	6	2	0	1
Salad Dressings	5	1	0	1
Salad Toppings	3	1	0	3
Baked Potato Toppings	3	1	0	3
Meat Temperature	5	1	1	1
Entrée Side Dishes	5	1	0	2

When finished, click the *Save* and *Done* buttons to save the last modifier group entered and exit the Add Modifier Groups screen.

Next, you must assign the individual modifiers to the modifier groups.

In Modifier Groups, click on the *List* Tab to display the list of modifier groups. Double-click on *Entrée Side Dishes* to display it under the Main Tab and then click the *Designer* Tab. Here you can use the filters to reduce the size of the list of items from which to choose. Select *Food* from the Department dropdown list and select *Side Dishes* from the Category dropdown list. This filters the items list to display only the side dishes that are in the system.

Now click on and drag each of the side dishes to your desired location in the grid on the right side of the screen. The items will appear on the XERA® POS Order Entry screen in the same order as displayed on this screen.

For our training purposes, we will leave the rest of the settings under the Designer Tab at their default values.

When finished, click the *New* button to save the item assignment and begin a new one (See Figure 27-2).

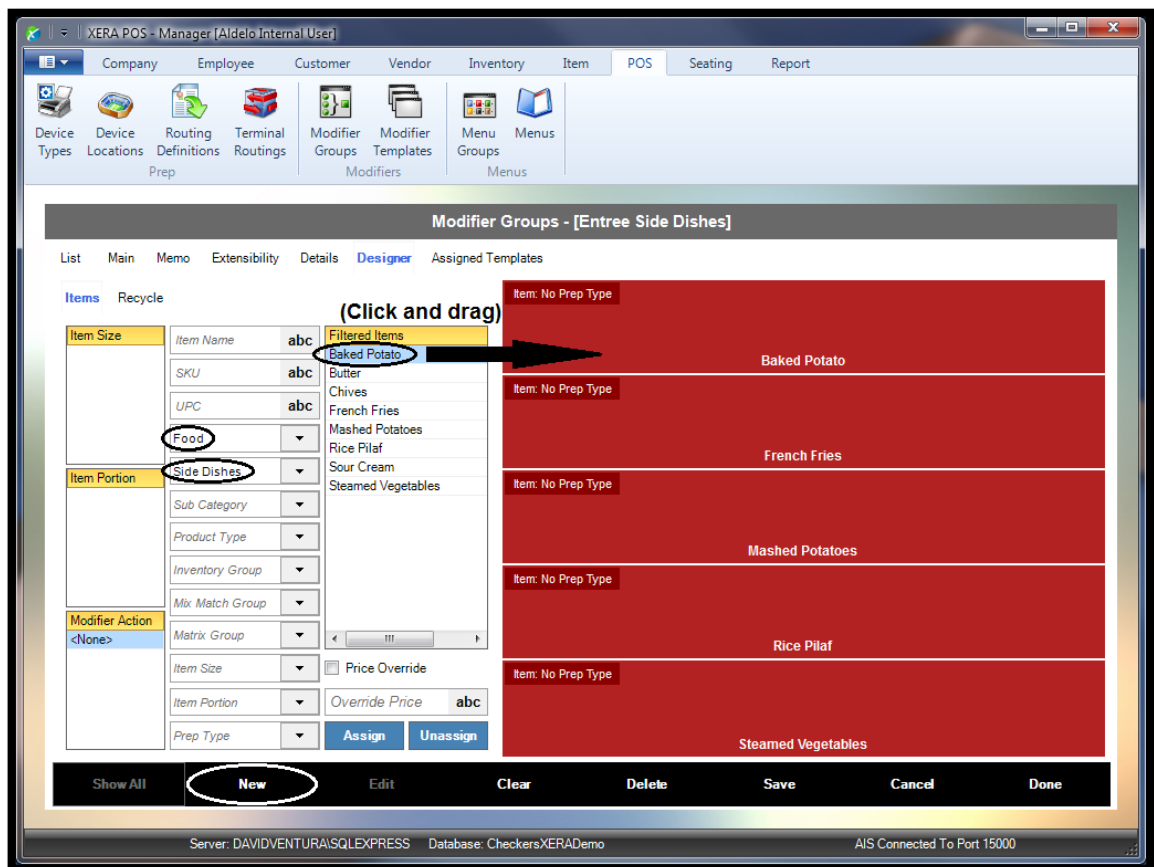


Figure 27-2

(Please note: If you wish to have the prep types appear in the upper left corners of the buttons in the grid, the prep types must be selected for each of the items during the entry of the items under the Item Tab.)

Now assign the rest of these modifiers to the modifier groups as listed in the following table:

Modifier Group	Department	Category	Sub Category	Product Type	Modifiers
Entrée Side Dishes	Food	Side Dishes			Baked Potato
					French Fries
					Mashed Potatoes
					Rice Pilaf
					Steamed Vegetables
Meat Temperature	Food	Entrees	Meat Dishes	Instructional Modifier	Rare
					Medium Rare
					Medium
					Medium Well
					Well Done
Salad Dressings	Food	Salads	Dinner Salads	Item Modifier	Italian Dressing
					Caesar Dressing
					Ranch Dressing
					Thousand Island Dressing
					Vinaigrette Dressing
Salad Toppings	Food	Salads	Dinner Salads	Item Modifier	Plain Croutons
					Cheese Croutons
					Bacon Bits
Baked Potato Toppings	Food	Side Dishes	Potato Side Dishes	Item Modifier	Butter
					Sour Cream
					Chives

Since side dishes are also available separately from the side dishes menu, we must override the price so that the customer is not charged for the two side dishes that are included with an entrée at no extra charge.

To do so, open the *Entrée Side Dishes* modifier group under the List Tab by double-clicking on it. Now click the *Designer* Tab and then click on *Baked Potato* in the button grid. In the lower right portion of the screen, select the *Pricing Use Override* checkbox and then enter “0.00” in the Override Price field to the right of the checkbox.

When finished click the *Save* button (See Figure 27-3).

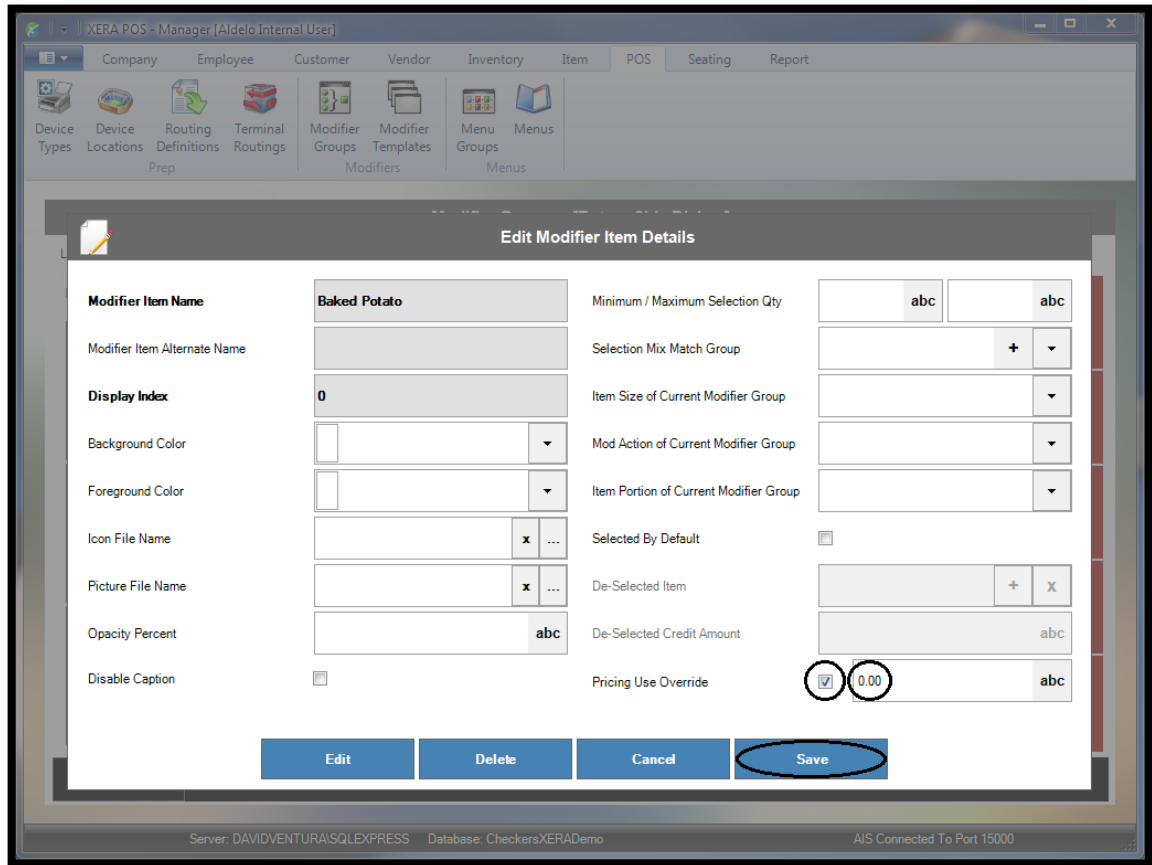


Figure 27-3

Now override the price for the rest of the items in the Entrée Side Dishes modifier group as listed in the following table:

Side Dish	Price Override	Override Price
Baked Potato	✓	0.00
French Fries	✓	0.00
Mashed Potatoes	✓	0.00
Rice Pilaf	✓	0.00
Steamed Vegetables	✓	0.00

We skipped the modifier groups where the modifier items were created via the matrix feature because modifier items are assigned to these modifier groups in a different way.

In Modifier Groups, click on the *List* Tab to display the list of modifier groups. Double-click on *Pizza Crusts* to display it under the Main Tab and then click the *Details* Tab. Here we must select the modifiers that are applicable to the selected modifier group. Not all modifiers are applicable to all modifier groups.

For the Pizza Crusts modifier group, select *Small*, *Medium*, *Large*, and *Extra Large* in the Assigned Item Sizes group box by clicking in their respective blank checkboxes. Next, enter corresponding sort order values (“10”, “20”, “30”, and “40”) for each of the selected item sizes, respectively. These selections are necessary because the different size pizzas will necessarily have different size crusts.

However, since there are no modifier actions that may be assigned to a pizza crust, no selections are required under the Assigned Modifier Actions column. Likewise, since a pizza may only have one kind of crust, even when different toppings are desired for the different portions of the pizza, no selections are required under the Assigned Item Portions column. Click the *Save* button.

Next, click the *Designer* Tab. In the Item Size column on the left side of the screen, select *Small* by clicking on it. Next, select *Pizza Crusts* from the Matrix Group dropdown list and select *Small* from the Item Size dropdown list. This filters the items list to display only the small size pizza crusts.

Now assign all of the small pizza crusts to the Pizza Crusts modifier group by clicking the *Assign* button (See Figure 27-4).

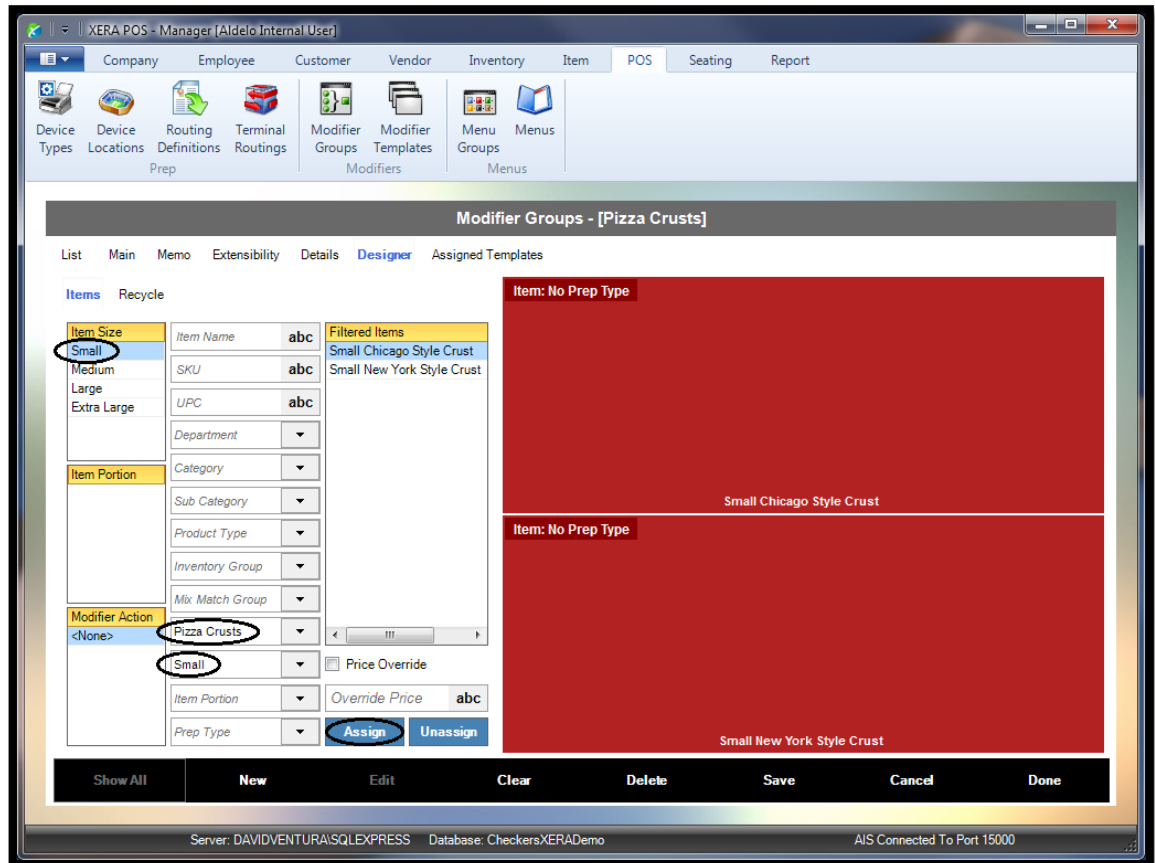


Figure 27-4

When prompted, click the *Yes...Auto Assign All Filtered Items* button to confirm the assignment. Please note that if you wish to assign the items to the button grid in an order other than the default order, you may alternatively drag each item from the Filtered Items list to your desired location on the grid.

Next, assign the medium, large, and extra large size pizza crusts to the Pizza Crusts modifier group by following the same procedure as listed above. Be sure to select the desired item from the Item Size column on the left side of the screen; also select the same size from the Item Size dropdown list before clicking the *Assign* button. Be sure that the number of items displayed in the Filtered Items list equals or is less than the number of buttons in the displayed grid. If not, recheck your item sizes, portions, modifier actions, and your filters to make sure they are correct. If necessary, change the values for the grid rows and grid columns before continuing so that there are enough buttons in the grid to hold all of the members of the modifier group.

Now we must assign the specialty pizzas to the Specialty Pizzas modifier group. The procedure is identical to that of assigning the pizza crusts to the Pizza Crusts modifier group, except that under the Details Tab, selections and sort order values are required under two of the three columns.

In the Assigned Item Sizes column, select *Small*, *Medium*, *Large*, and *Extra Large* by clicking in their respective blank checkboxes. Then, enter corresponding sort order values (“10”, “20”, “30”, and “40”) for each of the selected item sizes, respectively. These selections are necessary because there are four different size specialty pizzas available to the customers.

In the Assigned Item Portions column, select *Whole*, *1st Half*, and *2nd Half* by clicking in their respective blank checkboxes. Then, enter corresponding sort order values (“10”, “20”, and “30”) for each of the selected item sizes, respectively. These selections are necessary because the specialty pizza is available as either a whole pizza or as two different halves of pizza. When finished, click the *Save* button.

Now click on the *Designer* Tab. Under the Items Tab, select *Small* from the Item Size column and select *Whole* from the Item Portion column. Next, select *Pizza Type* from the Matrix Group filter dropdown list, select *Small* from the Item Size filter dropdown list, and select *Whole* from the Item Portion filter dropdown list. This causes all of the small whole specialty pizzas to display in the Filtered Items list. Click the *Assign* button to assign the items displayed in the Filtered Items list to the button grid.

Please note that if you wish to assign the items to the button grid in an order other than the default order, you may alternatively drag each item from the Filtered Items list to your desired location on the grid.

If you now click on *1st Half* or *2nd Half* in the Item Portion list on the left side of the screen, you see that these portions have been automatically populated in the button grid. This is because the matrix was used to create the specialty pizzas. If you had created the specialty pizzas manually, one at a time, you would have had to assign the specialty pizzas to each portion under the Item Portion list of the Specialty Pizzas modifier group individually.

Next, assign the medium, large, and extra large size specialty pizzas to the Specialty Pizzas modifier group by following the same procedure as listed above. Be sure to select the desired item from the Item Size column on the left side of the screen; also select the same size from the Item Size dropdown list before clicking the *Assign* button. Be sure that the number of items displayed in the Filtered Items list equals or is less than the number of buttons in the displayed grid. If not, recheck your item sizes, portions, modifier actions, and your filters to make sure they are correct. If necessary, change the values for the grid rows and grid columns before continuing so that there are enough buttons in the grid to hold all of the members of the modifier group.

Finally, we must assign the pizza toppings to the Pizza Toppings modifier group. Under the Details Tab, selections and sort order values are required under each of the three columns.

In the Assigned Modifier Actions column, select *Add* and *Double* by clicking in their respective blank checkboxes. Next, enter corresponding sort order values (“10” and “20”) for each of the selected modifier actions, respectively. These selections are necessary because the customer may choose to simply add an extra topping to his pizza or to add double the normal amount of extra topping to his pizza.

In the Assigned Item Sizes column, select *Small*, *Medium*, *Large*, and *Extra Large* by clicking in their respective blank checkboxes. Then, enter corresponding sort order values (“10”, “20”, “30”, and “40”) for each of the selected item sizes, respectively. These selections are necessary because the different size pizzas will necessarily have different amounts of extra toppings.

In the Assigned Item Portions column, select *Whole*, *1st Half*, and *2nd Half* by clicking in their respective blank checkboxes. Then, enter corresponding sort order values (“10”, “20”, and “30”) for each of the selected item sizes, respectively. These selections are necessary because the different pizza portions will necessarily have different amounts of extra toppings. When finished, click the *Save* button.

Now click on the *Designer* Tab. Under the Items Tab, select *Small* from the Item Size column, select *Whole* from the Item Portion column, and select *Add* from the Modifier Action column. Next, select *Pizza Toppings* from the Matrix Group filter dropdown list, select *Small* from the Item Size filter dropdown list, and select *Whole* from the Item Portion filter dropdown list. This causes all of the small whole pizza toppings to display in the Filtered Items list. Since there is no filter for Modifier Actions, enter “Add” in the Item Name filter near the top of the screen and then press the *Enter* key on your keyboard to implement the filter. When you do so, all items that do not contain the character string “Add” are filtered out of the list, thereby leaving only the desired items.

Click the *Assign* button to assign the items displayed in the Filtered Items list to the button grid (See Figure 27-5).

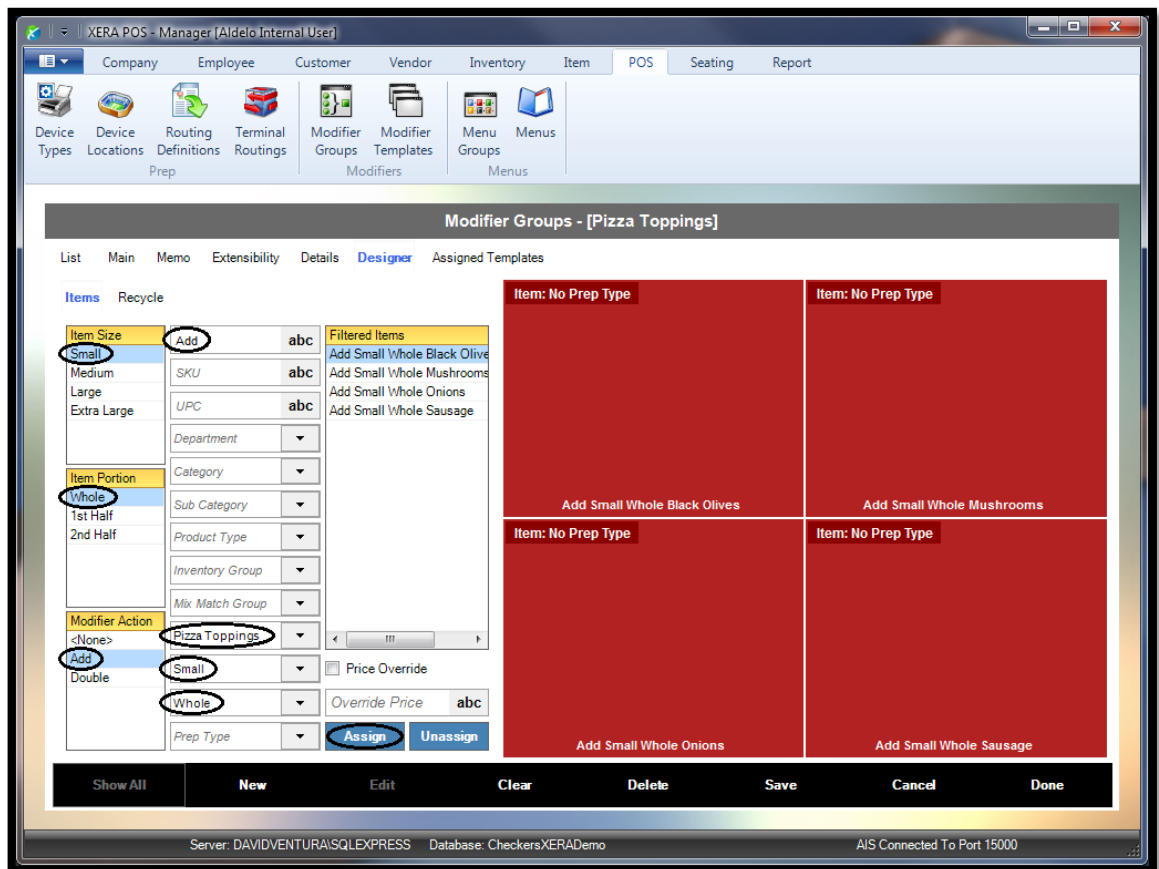


Figure 27-5

Please note that if you wish to assign the items to the button grid in an order other than the default order, you may alternatively drag each item from the Filtered Items list to your desired location on the grid.

If you now click on *1st Half* or *2nd Half* in the Item Portion list on the left side of the screen, you see that these portions have been automatically populated. This is because the matrix was used to create the topping items. If you had created the toppings manually, one at a time, you would

have had to assign the topping items to each portion under the Item Portion list of the Toppings modifier group individually.

Now assign the rest of these modifiers as listed in the following table. First, setup the columns and filters as listed, and then click the *Assign* button to complete the assignment. Be sure you have a sufficient number of buttons available by adjusting the number of grid rows and columns as necessary.

Item Size Column	Item Portion Column	Modifier Action Column	Matrix Group Filter	Item Size Filter	Item Portion Filter	Item Name Filter
Small	Whole	Add	Pizza Toppings	Small	Whole	Add
Small	Whole	Double	Pizza Toppings	Small	Whole	Double
Medium	Whole	Add	Pizza Toppings	Medium	Whole	Add
Medium	Whole	Double	Pizza Toppings	Medium	Whole	Double
Large	Whole	Add	Pizza Toppings	Large	Whole	Add
Large	Whole	Double	Pizza Toppings	Large	Whole	Double
Extra Large	Whole	Add	Pizza Toppings	Extra Large	Whole	Add
Extra Large	Whole	Double	Pizza Toppings	Extra Large	Whole	Double

Please note that if you need to unassign a group of modifiers, you must select the same items in the columns and filters before clicking the *Unassign* button. You must then also select each of the portions in the Item Portion column in turn and unassign them as well, as simply unassigning the Whole portion does not unassign the remainder of the portions under the Item Portion column.

Modifier Templates

Modifier Templates are defined as collections of one or more modifier groups. The modifier templates are created and then the modifier groups are assigned to the modifier templates. Once all of the modifier templates have been created, the templates are assigned to the menu items.

In Modifier Templates, click on the *New* button to display the Modifier Templates – [Add New Record] screen. Enter “Entrée Template” in the Modifier Template Name field. Next, click on the *Designer* Tab and select the *Entrée Side Dishes* checkbox under the Modifier Group Name column and enter “10” for the modifier group under the Sort Order column.

For our training purposes, we will leave the rest of the settings under the Main Tab at their default values.

When finished, click the *New* button to save the modifier template and begin a new one (See Figure 27-6).

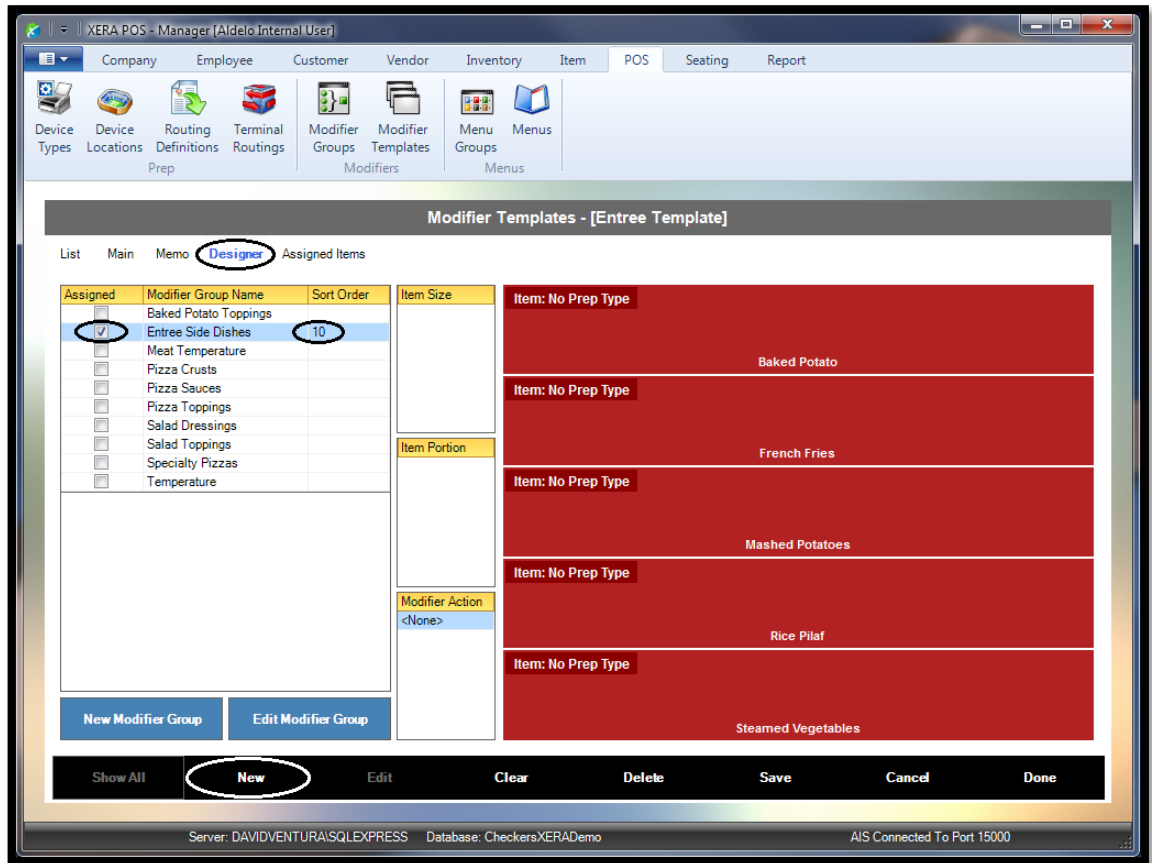


Figure 27-6

Now enter the rest of these modifier templates as listed in the following table:

Modifier Template Name	Assigned Modifier Groups	Sort Order
Entrée Template		
	Entrée Side Dishes	10
New York Steak Template		
	Meat Temperature	10
	Entrée Side Dishes	20
Chef Salad Template		
	Salad Dressings	10
	Salad Toppings	20
Pizza Template		
	Pizza Crusts	10
	Pizza Toppings	20
Baked Potato Template		
	Baked Potato Toppings	10

When finished, click the *Save* and *Done* buttons to save the last modifier group entered and exit the Add Modifier Groups screen.

Next, you must assign the modifier templates to the menu items. Click on the *Item* Tab and then click on *Items* in the Manage group to display your list of menu items. Scroll down to and select the *Maine Lobster* menu item by double-clicking on it. Alternatively, you may enter “Maine” in the Item Name filter field to automatically find the menu item in the list.

Once the menu item is open, click on the *Modifiers* Tab and then click the *New Assignment* button. Under the Modifier Template Details group box on the right side of the screen, click the *down arrow* button to the right of the Modifier Template field. Select *Entrée Template* by clicking on it. Next, select the *Auto Prompt* checkbox. This causes the software to prompt the order taker to ask which two side dishes the customer would like with his entrée.

For our training purposes, we will leave the rest of the settings in the Modifier Template Details group box at their default values.

When finished, click the *Save Assignment* button to save the modifier template assignment (See Figure 27-7).

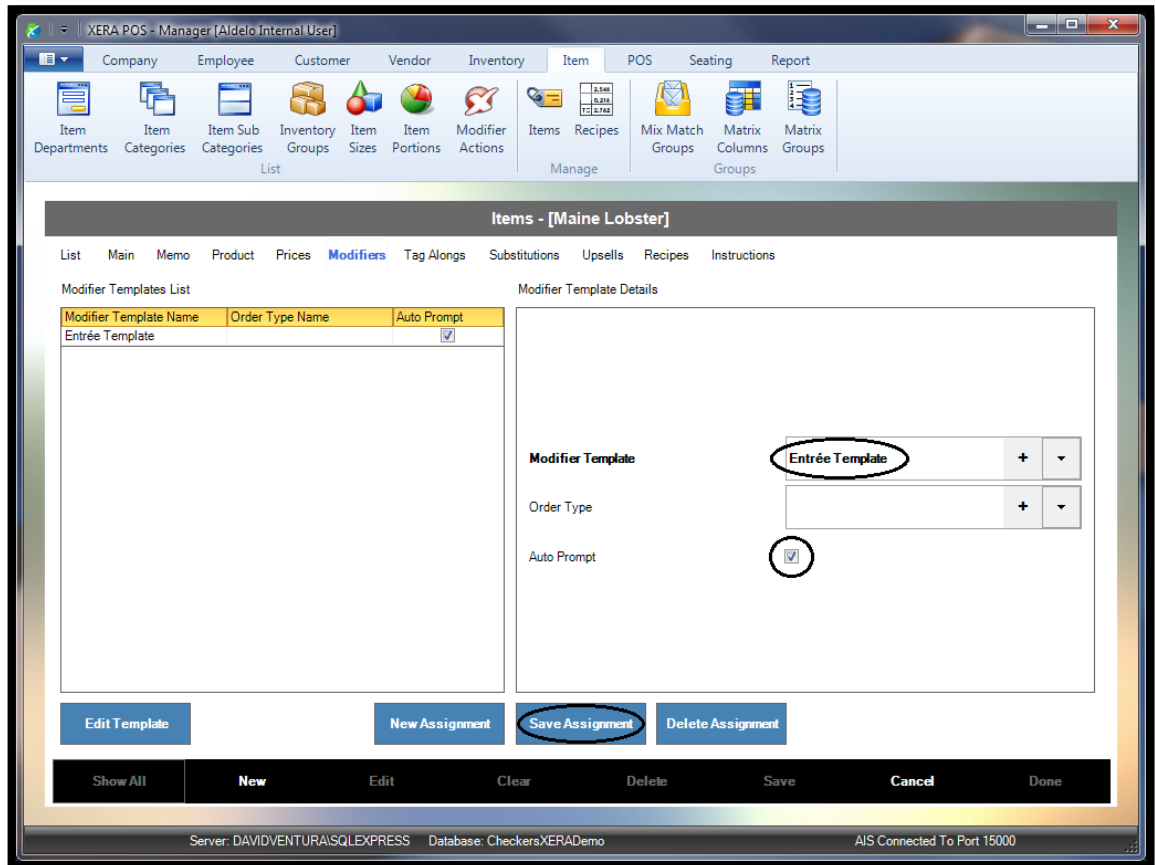


Figure 27-7

Now click the *List* Tab to return to the Items list and enter the rest of these modifier template assignments as listed in the following table:

Menu Item	Assigned Modifier Template	Auto Prompt
Maine Lobster	Entrée Template	✓
Pork Chops	Entrée Template	✓
Roasted Chicken	Entrée Template	✓
New York Steak	New York Steak Template	✓
Chef Salad	Chef Salad Template	✓
Baked Potato	Baked Potato Template	✓
Small Whole Cheese Pizza	Pizza Template	✓
Small Whole Pepperoni Pizza	Pizza Template	✓
Small Halves Cheese Pizza	Pizza Template	✓
Small Halves Pepperoni Pizza	Pizza Template	✓
Medium Whole Cheese Pizza	Pizza Template	✓
Medium Whole Pepperoni Pizza	Pizza Template	✓
Medium Halves Cheese Pizza	Pizza Template	✓
Medium Halves Pepperoni Pizza	Pizza Template	✓
Large Whole Cheese Pizza	Pizza Template	✓
Large Whole Pepperoni Pizza	Pizza Template	✓
Large Halves Cheese Pizza	Pizza Template	✓
Large Halves Pepperoni Pizza	Pizza Template	✓
Extra Large Whole Cheese Pizza	Pizza Template	✓
Extra Large Whole Pepperoni Pizza	Pizza Template	✓
Extra Large Halves Cheese Pizza	Pizza Template	✓
Extra Large Halves Pepperoni Pizza	Pizza Template	✓

When finished, click the *Cancel* button to exit the Items screen.

Chapter 28 — POS Menus

Menu Groups

Menu Groups are created to allow the organization of menu items into logical groups that have similar characteristics. Menu items are typically arranged into such groups as appetizers, desserts, salads, side dishes, beverages, entrées, etc.

In XERA® POS, the user selects the desired menu group button to display the menu items that belong to that selected menu group. Once the menu groups have been created, then the menu items may be tied to their corresponding menu groups.

In Menu Groups, click on the *New* button to display the Menu Groups – [Add New Record] screen. Enter “Entrées” in the Menu Group Name field, enter “5” in the Grid Rows field, and enter “1” in the Grid Columns field.

For our training purposes, we will leave the rest of the settings under the Main Tab at their default values.

When finished, click the *New* button to save the menu group and begin a new one (See Figure 28-1).

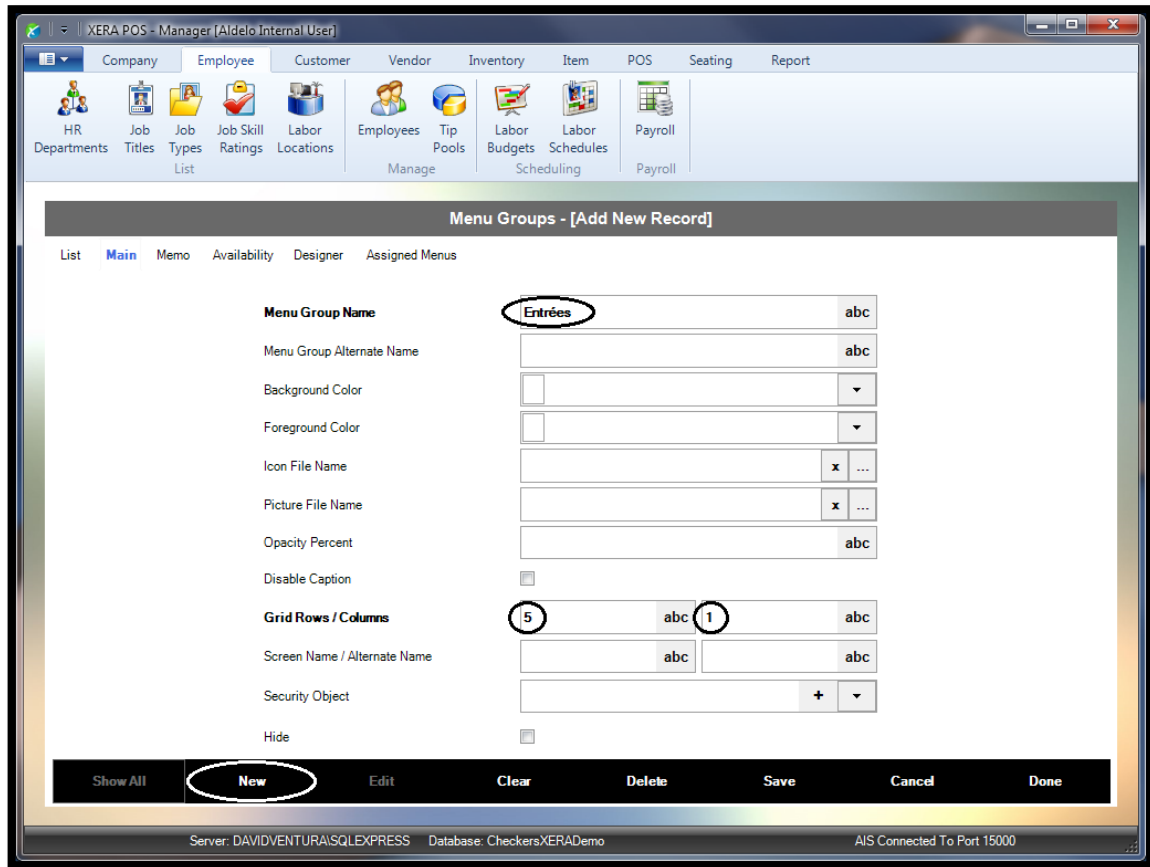


Figure 28-1

Now enter the rest of these menu groups as listed in the following table:

Menu Group Name	Grid Rows	Grid Columns
Entrées	5	1
Appetizers	2	2
Salads	2	2
Side Dishes	5	1
Desserts	2	2
Beverages	2	2
Bar	3	2

When finished, click the *Save* button to save the last menu group entered.

Now click on the *List* Tab and select *Appetizers* from the list of menu groups by double-clicking on it, and then click the *Designer* Tab to display a list of items that may be assigned to the appetizers menu group (if the list fails to display, click the *Items* Tab beneath the *Designer* Tab). If desired, the size of the displayed list may be reduced by making the appropriate choices from the list filters on the left side of the screen.

To assign your menu items to the Appetizers menu group, click on the desired menu item in the list and drag it to your desired location on the button grid displayed on the right side of the screen.

Repeat this procedure until all of the menu items that belong to the Appetizers menu group have been assigned a button location in the grid.

When finished, click the *New* button to save the menu item assignment and begin a new one (See Figure 28-2).

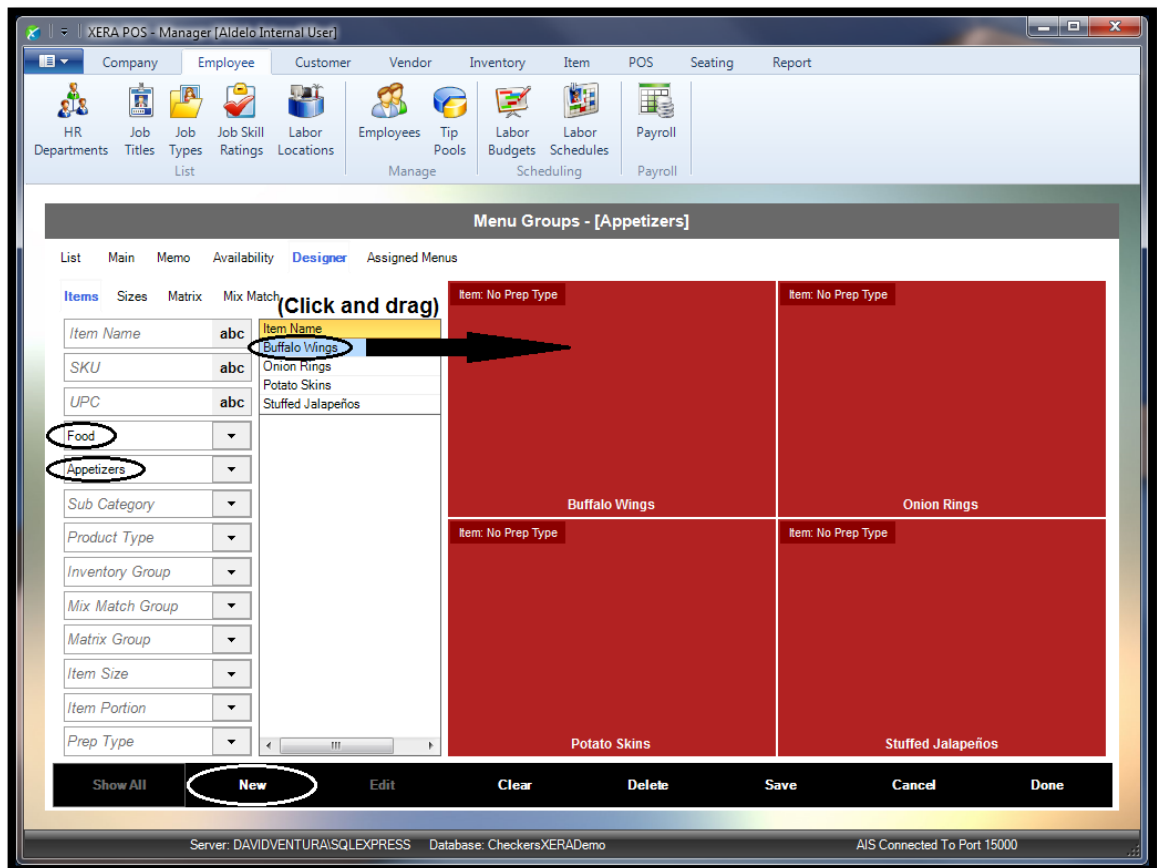


Figure 28-2

Now assign the rest of these menu items to their respective menu groups as listed in the following table:

Menu Group Name	Menu Items	
Entrées	New York Steak	Maine Lobster
	Roasted Chicken	Pork Chops
	Specialty Pizza	
Appetizers	Buffalo Wings	Onion Rings
	Potato Skins	Stuffed Jalapeños
Salads	Chef Salad	Tuna Salad
	Chicken Salad	Pasta Salad
Side Dishes	Baked Potato	French Fries
	Mashed Potatoes	Rice Pilaf
	Steamed Vegetables	
Desserts	Vanilla Ice Cream	Cheese Cake
	Apple Pie	Chocolate Cake
Beverages	Coca-Cola	Diet Coke
	Coffee	Hot Tea
Bar	Budweiser	Heineken
	Bloody Mary	Screwdriver
	Vodka	Scotch

When finished, click the *Save* and *Done* buttons to save the last assignment and exit the Menu Groups screen.

Menus

Menus are defined as menu groups that are available to customers on specific days of the week and at specific times of the day. A restaurant may have only one menu that is available at all times when the restaurant is open for business, or it may have several different menus that are available on different days and/or at different times of the day.

For example, the breakfast menu might be available from opening time until 11:29AM, the lunch menu might be available from 11:30AM time until 3:59PM, and the dinner menu might be available from 4:00PM time until closing time; or, all menus may be available at all times of the day. All of these menus are created under the Menu feature. Each menu may be assigned to one or more order types and multiple menus may be assigned to the same order type, but made available at different times of the day.

In Menus, click on the *New* button to display the Menus – [Add New Record] screen. Enter “Lunch Menu” in the Menu Name field and enter “10” in the Sort Order field. The sort order number dictates the order in which the menus display on the screen in XERA® POS. Numbering the sort order in multiples of ten allows you to insert additional menus between existing menus in the future without the need to renumber all of your existing menus.

For our training purposes, we will leave the rest of the settings under the Main Tab at their default values.

When finished, click the *New* button to save the menu and begin a new one (See Figure 28-3).

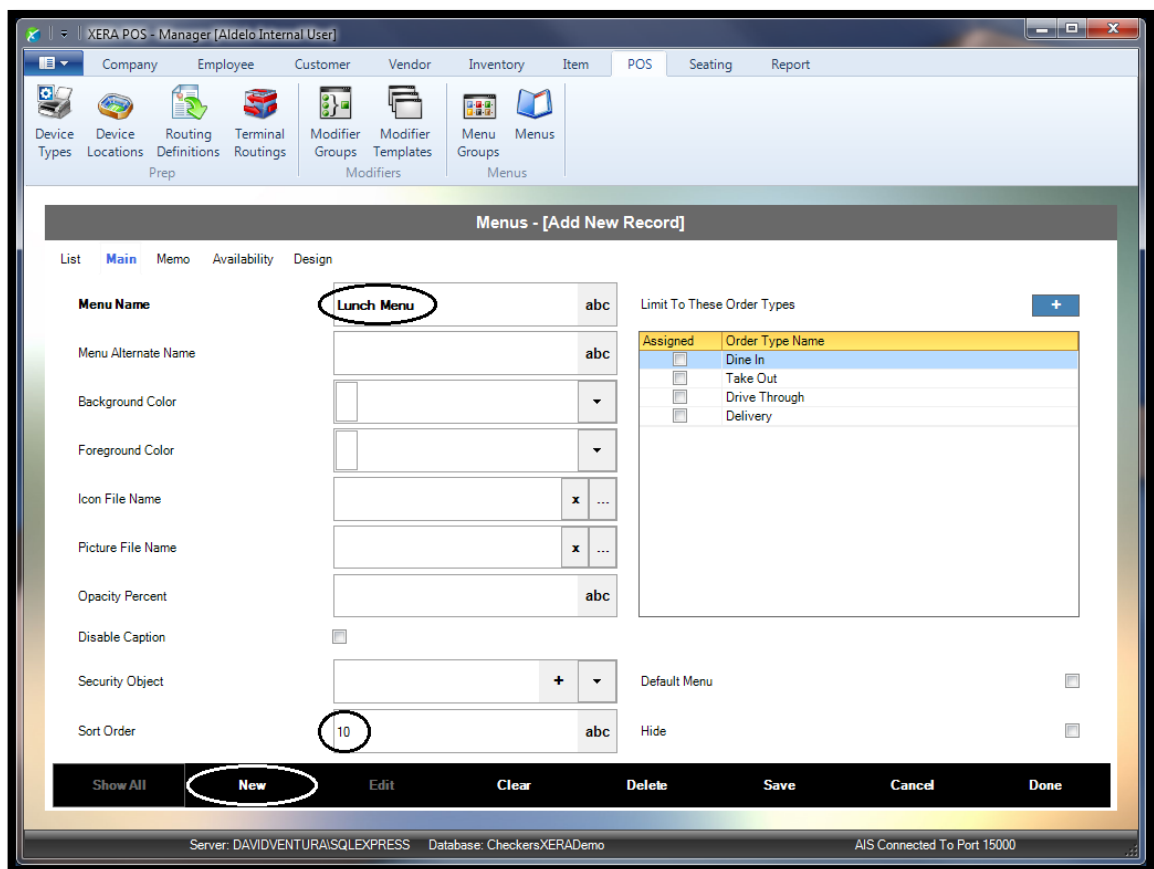


Figure 28-3

Now enter the rest of these menus as listed in the following table:

Menu Name	Sort Order
Lunch Menu	10
Dinner Menu	20

When finished, click the *Save* button to save the last menu entered.

Next, click on the *List* Tab and select *Lunch Menu* by double-clicking on it. Now click the *Design* Tab. On the left side of the screen, select the checkboxes next to the following menu groups: Appetizers, Beverages, Desserts, Entrées, and Salads.

For our training purposes, we will leave the rest of the settings under the Design Tab at their default values.

By selecting these menu groups, the lunch menu is restricted to the items contained in them. For example, a guest may not select an item from the bar menu group during the period when only the lunch menu is available.

When finished, click the *New* button to save the menu groups assignment and begin a new one (See Figure 28-4).

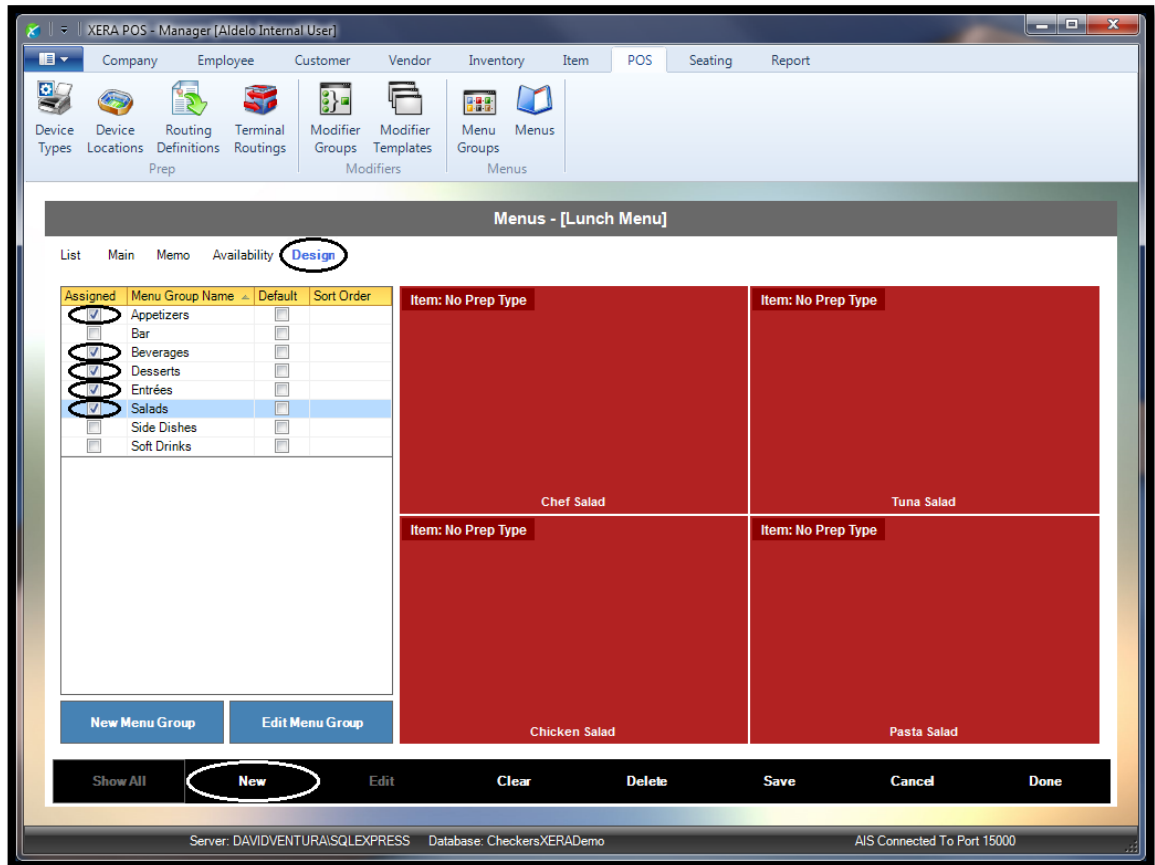


Figure 28-4

Now enter the rest of these menu group assignments as listed in the following table:

Menu Name	Appetizers	Bar	Beverages	Desserts	Entrees	Salads	Side Dishes
Lunch Menu	✓		✓	✓	✓	✓	
Dinner Menu	✓	✓	✓	✓	✓	✓	✓

When finished, click the *Save* and *Done* buttons to save the last menu group assignment and exit the Menus screen.

Chapter 29 — Seating Manage

Courses

The Courses feature of XERA® POS allows the manager to divide the guest party’s meal into logical groups that are served in succession, until all have been served.

For example, a guest party’s meal could be divided into the Appetizer Course, the Soup and Salad Course, the Main Course, the Dessert Course, and the After Meal Drinks Course. Each course is usually served by the waitperson in sequence after the guest party has finished the previous course.

In Courses, click on the *New* button to display the Course – [Add New Record] screen. Enter “1” in the Course Number field and then enter “Appetizer” in the Course Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the course and begin a new one (See Figure 29-1).

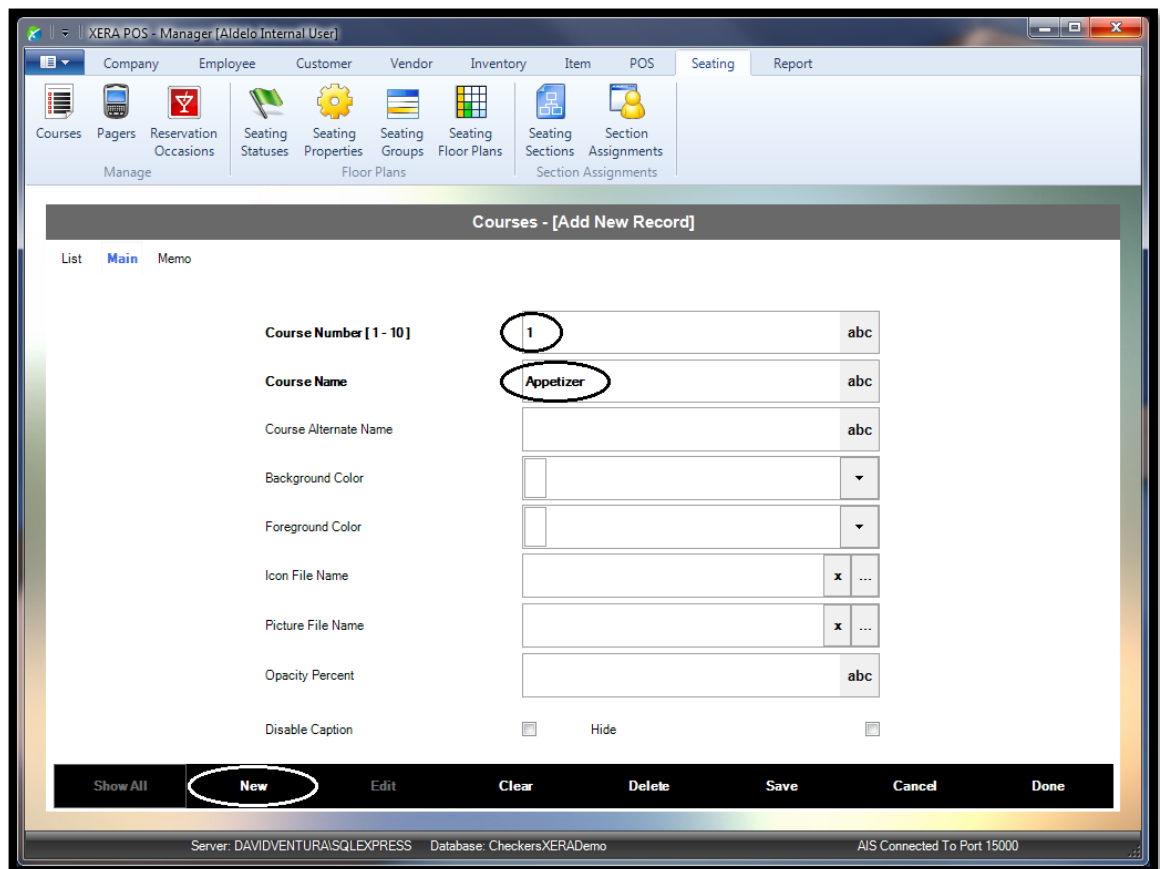


Figure 29-1

Now enter the rest of these courses as listed in the following table:

Course Number	Course Name
1	Appetizer
2	Soup and Salad
3	Main
4	Dessert
5	After Meal Drinks

When finished, click the *Save* and *Done* buttons to save the last course entered and exit the Add Course screen.

Pagers

Reserved for future use.

Reservation Occasions

Reserved for future use.

Chapter 30 — Seating Floor Plans

Seating Statuses

Seating Statuses are defined as the levels of progress the guest parties have reached in their dining experiences.

For example, the seating statuses for a restaurant might include Guests Seated, Drinks Ordered, Drinks Served, Entrées Ordered, Entrées Served, Follow Up, and Guest Check Presented. As a guest party progresses through its meal, its status is updated by the waitperson as each level is reached. Reminder messages may also be programmed to display to the waitperson when the guest party's status has not been updated in a timely manner. This system helps to ensure that no level of service is skipped and that each is performed without delay.

In Seating Statuses, click on the *New* button to display the Seating Statuses – [Add New Record] screen. Enter “Guests Seated” in the Seating Status Name field. Next, enter “10” in the Sort Order field. By numbering your sort orders in multiples of ten, you allow yourself room to add additional seating statuses in the future between the existing seating statuses without the necessity of renumbering all of your existing sort order numbers.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the seating status and begin a new one (See Figure 30-1).

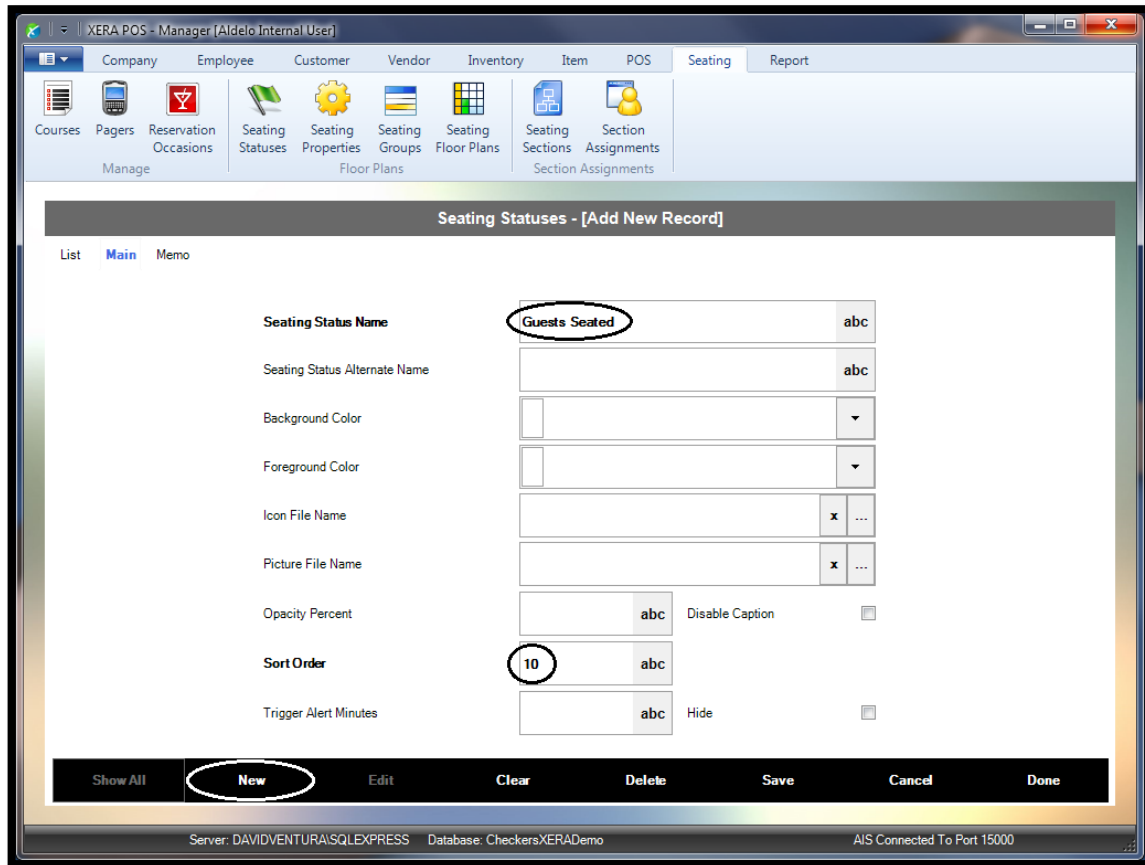


Figure 30-1

Now enter the rest of these seating statuses as listed in the following table:

Seating Status Name	Sort Order
Guests Seated	10
Drinks Ordered	20
Drinks Served	30
Entrées Ordered	40
Entrées Served	50
Follow Up	60
Check Presented	70

When finished, click the *Save* and *Done* buttons to save the last seating status entered and exit the Add Seating Status screen.

Seating Properties

A Seating Property is a characteristic about a selected table. For example, a table might have multiple seating properties such as the fact that it is near a window, it is in the smoking section, the table is in a booth, etc. These seating properties may be added, edited, or deleted under the Seating Properties Tab.

In Seating Properties, click on the *New* button to display the Seating Properties – [Add New Record] screen. Enter “Booth Seating” in the Seating Property Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the seating property and begin a new one (See Figure 30-2).

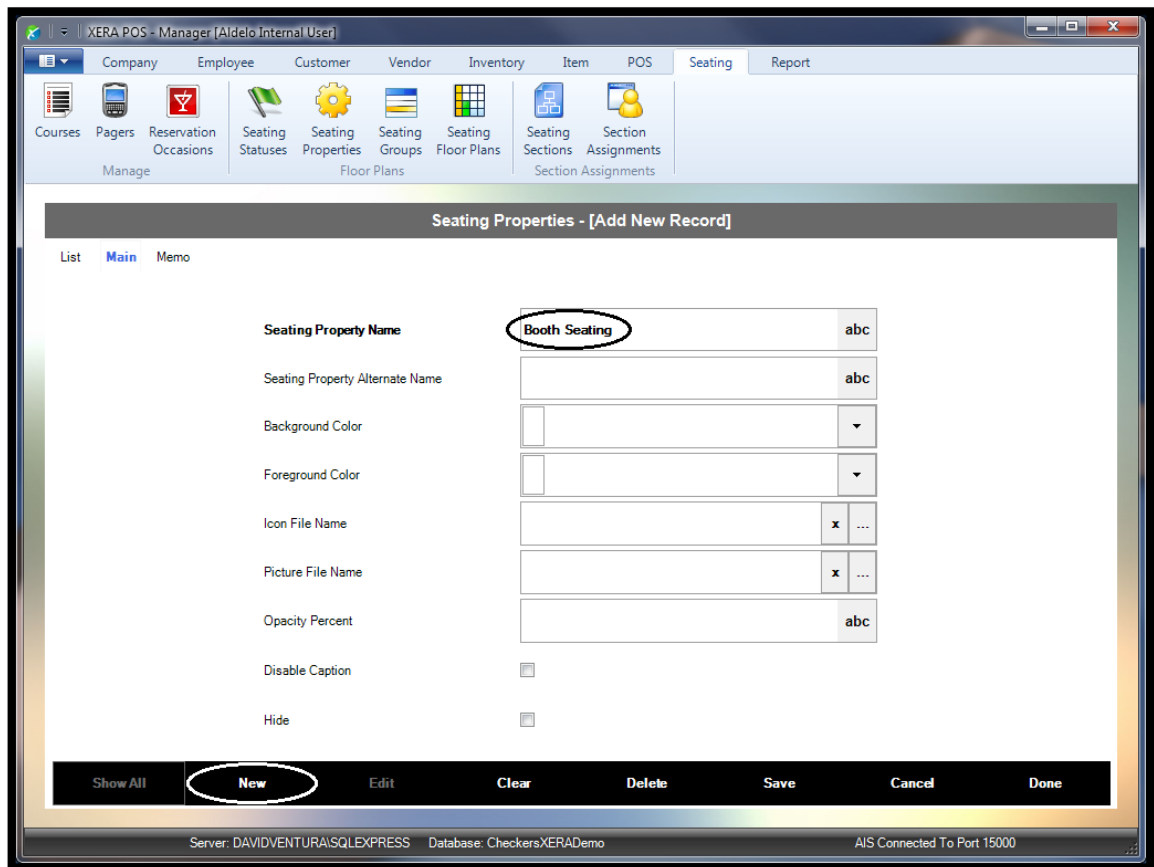


Figure 30-2

Now enter the rest of these seating properties as listed in the following table:

Seating Property Name
Booth Seating
Smoking Allowed
Near Window

When finished, click the *Save* and *Done* buttons to save the last seating property entered and exit the Add Seating Properties screen.

Seating Groups

A Seating Group is defined as a location within a restaurant where a group of tables is located. In a large restaurant, there may be several different seating groups such as the bar area, the outdoor patio area, the main dining room, the overflow dining room, and one or more private dining rooms. In a small restaurant, there may be only a single seating group.

In Seating Groups, click on the *New* button to display the Seating Groups – [Add New Record] screen. Enter “Main Dining Room” in the Seating Group Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the seating group and begin a new one (See Figure 30-3).

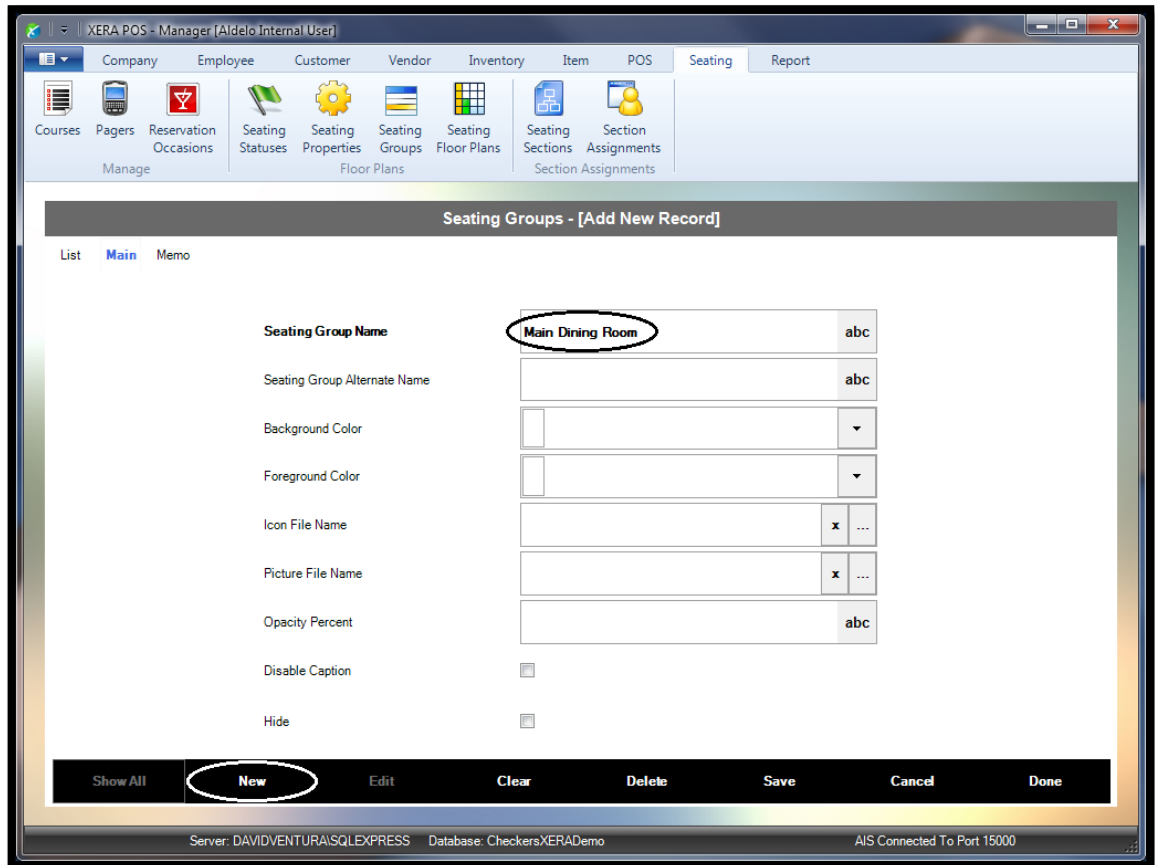


Figure 30-3

Now enter the rest of these seating groups as listed in the following table:

Seating Group Name
Main Dining Room
Bar
Patio Dining Area

When finished, click the *Save* and *Done* buttons to save the last seating group entered and exit the Add Seating Group screen.

Seating Floor Plans

The Seating Floor Plans feature of XERA® POS allows the manager to create a diagram of the restaurant's table layout. This diagram is then used in the Hostess feature of XERA® POS when assigning tables to guest parties.

To create a new seating floor plan, click on the Seating Floor Plans Tab and then follow the steps below.

Under the General Tab, click the *down arrow* button to the right of the Seating Groups field and then select *Main Dining Room* from the dropdown list. Please note that the seating groups must be created in advance, as described in the previous section, or they do not display in the Seating Groups field.

Next, add the tables to your floor plan. Add a square table to the seating floor plan diagram by left-clicking with your mouse on the *Square Table* label on the left side of the screen, holding the left mouse button down, and dragging the square table to the desired location on the seating floor plan. To resize a square table, hover your mouse over the border of the table that you wish to resize until the cursor changes to a double-headed arrow. Next, drag the table's border to the desired new location. The procedure is the same for adding a round table.

Add seven square tables and eight round tables to the floor plan as seen in the following figure (See Figure 30-4).

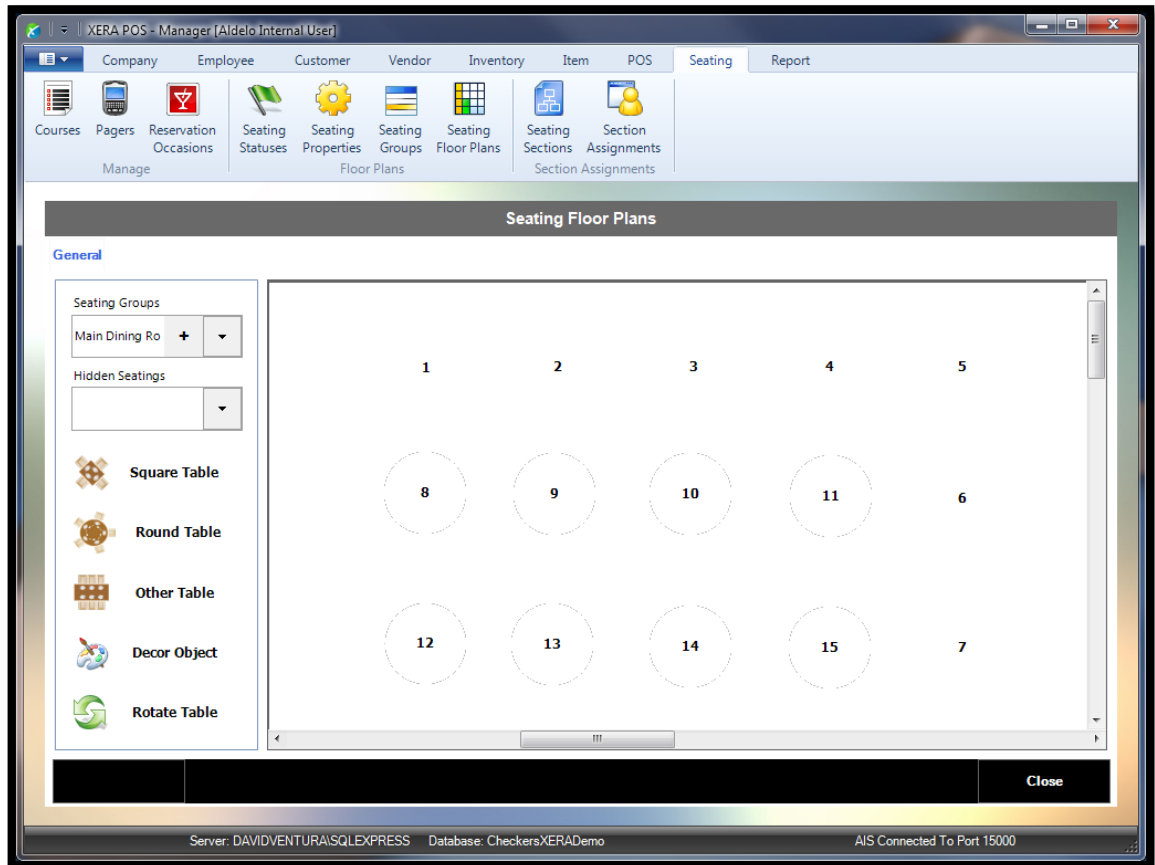


Figure 30-4

The Edit Seating Object Details screen may be accessed for each table and other object in the seating diagram by left-clicking on the object in the diagram with your mouse. Here, the seating object details may be edited as necessary.

For our training purposes, change the background color of each table so that it is easier to see in the table diagram. Select the same background color for all of the square tables and select a contrasting color for all of the round tables. To do so, click the *down arrow* button to the right of the Background Color field and then select your desired color from the grid. Also, number the square tables as 1–7 and the round tables as 8–15. This is accomplished by changing the Seating Object Name.

Be sure to click the *Save* button when finished editing the seating object details for each table to save your changes (See Figure 30-5).

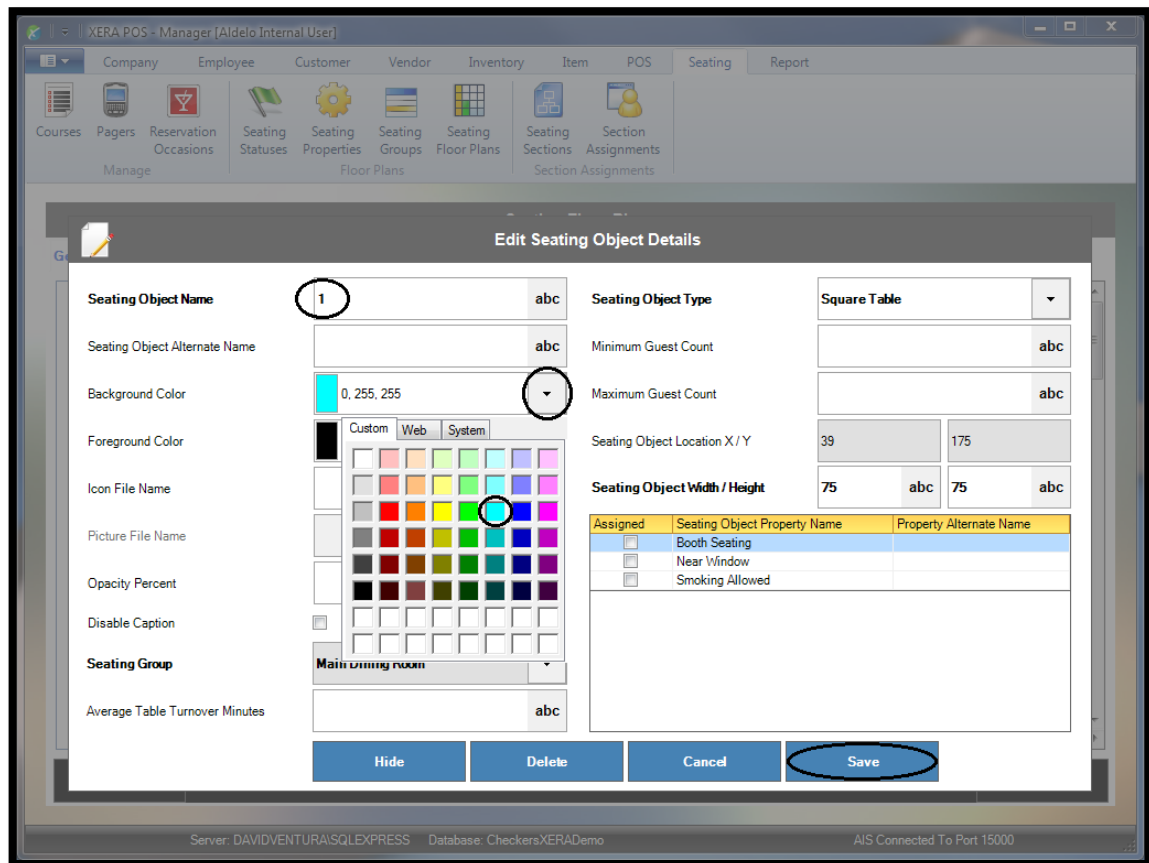


Figure 30-5

To delete a seating object, open the Edit Seating Object Details screen for the desired object and then click the *Delete* button. If a seating object cannot be deleted, it may be hidden from the seating diagram by clicking the *Hide* button.

The rotate table feature allows the user to rotate each object by 90°. To rotate an object, left-click the *Rotate Table* label with your mouse to change the background color of the label to red. Whenever the background displays in red, the feature is active. Next, click on the object that you wish to rotate. The object rotates by 90°. To deactivate the feature, click on the *Rotate Table* label again. When the background displays in white, the feature is inactivate. Please note that attempting to rotate a round or square object has no effect. Only non-symmetrical objects may be rotated.

For our training purposes, we will leave the rest of the seating object details for each table at their default values.

When finished, your table diagram should resemble the one below (See Figure 30-6).

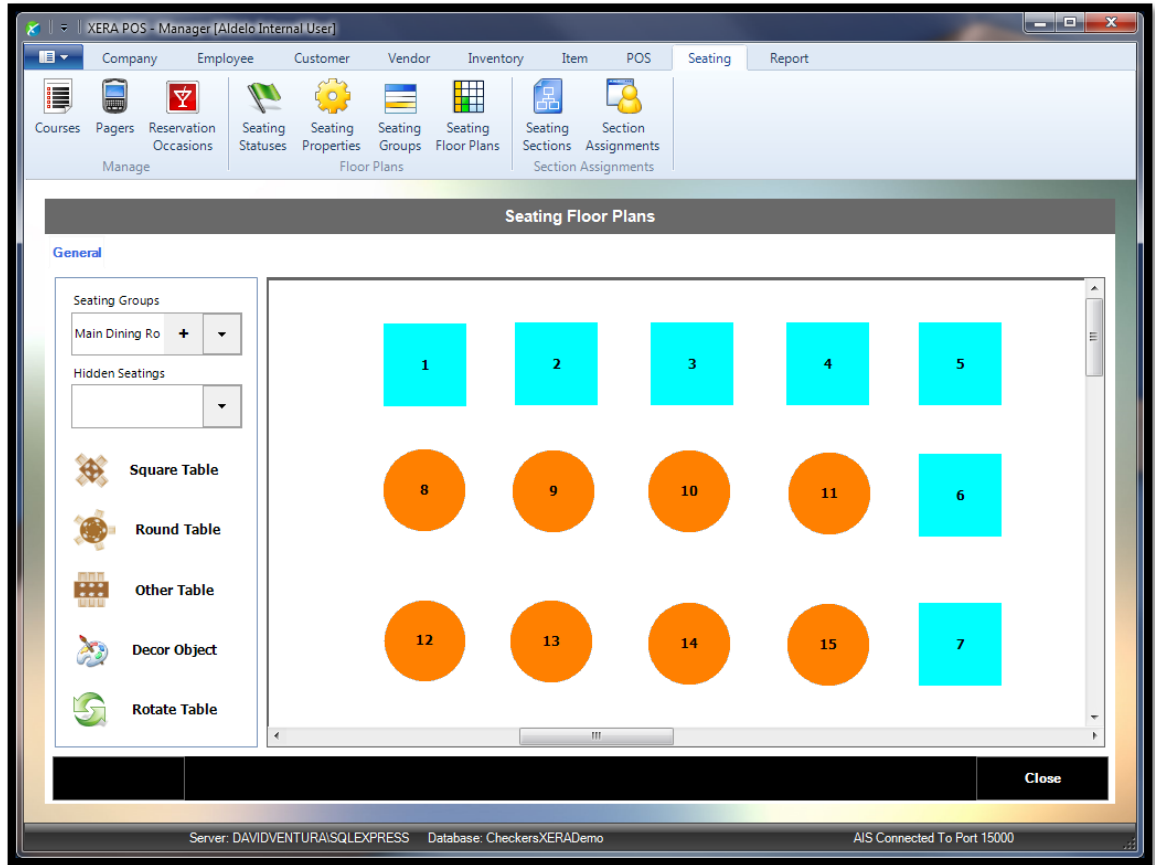


Figure 30-6

Chapter 31 — Seating Section Assignments

Seating Sections

The Seating Sections feature of XERA® POS allows the manager to divide the table groups into various sections that may then be assigned to members of the wait staff. These wait staff members are then responsible for serving all of the tables in their assigned sections.

In Seating Sections, click on the *New* button to display the Seating Sections – [Add New Record] screen. Enter “Tables 1-7” in the Seating Section Name field.

For our training purposes, we will leave the rest of the settings at their default values.

When finished, click the *New* button to save the seating section and begin a new one (See Figure 31-1).

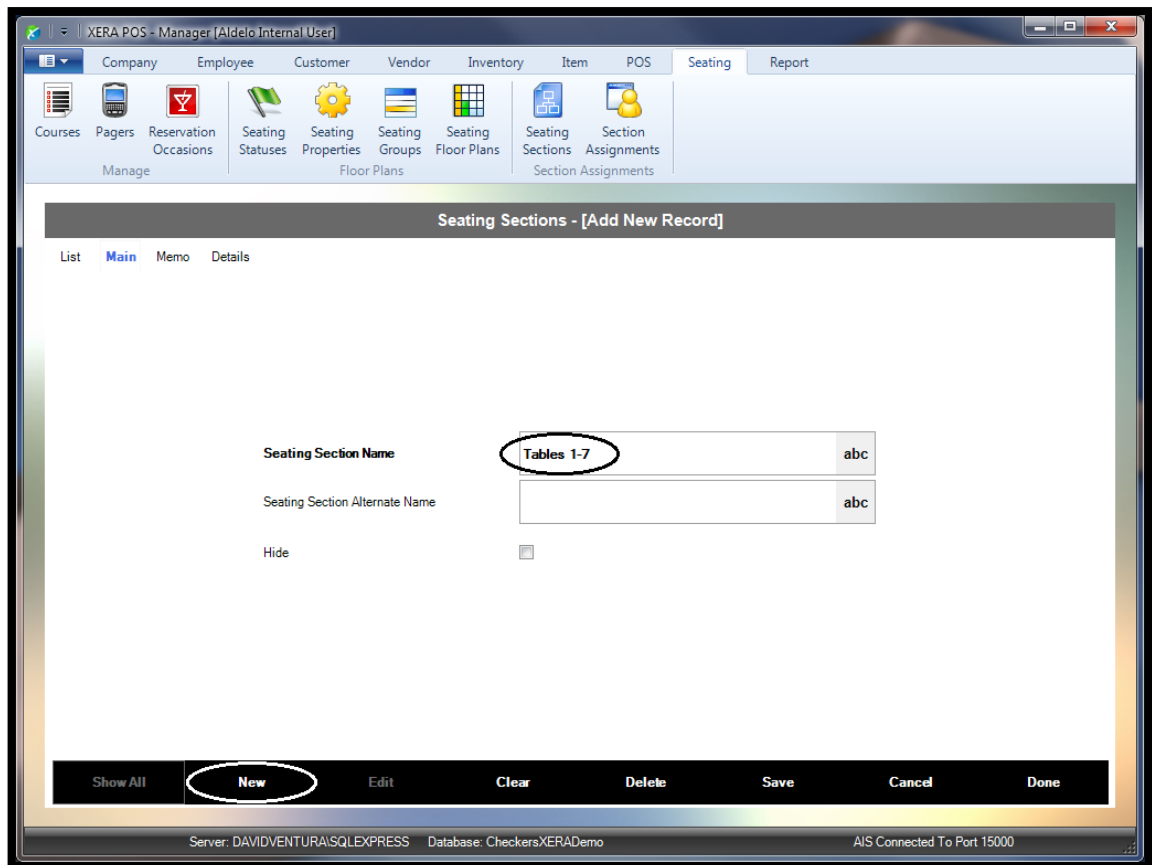


Figure 31-1

Now enter the rest of these seating sections as listed in the following table:

Seating Section Name
Tables 1-7
Tables 8-15

When finished, click the *Save* and *Done* buttons to save the last seating section entered and exit the Add Seating Section screen.

Section Assignments

The Section Assignments feature of XERA® POS allows the manager to assign the previously created seating sections to various employees based upon the day of the week and the time of day. An entire week may be assigned at once.

In Seating Section Assignments, select the seating section to which you wish to assign your employees by clicking on its name under the Seating Section Name column. Next, if you wish to filter the list to reduce the number of employees from which to choose, you may make selections from the HR Department and Job Title dropdown list boxes.

Select the day of the week and the employee you wish to assign to the selected seating section for that day by double-clicking in the appropriate cell of the grid. The Section Assignment window appears. Enter the beginning and ending times of day that you wish to assign the employee to the seating section.

Click the *OK* button to when finished to complete the assignment (See Figure 31-2).

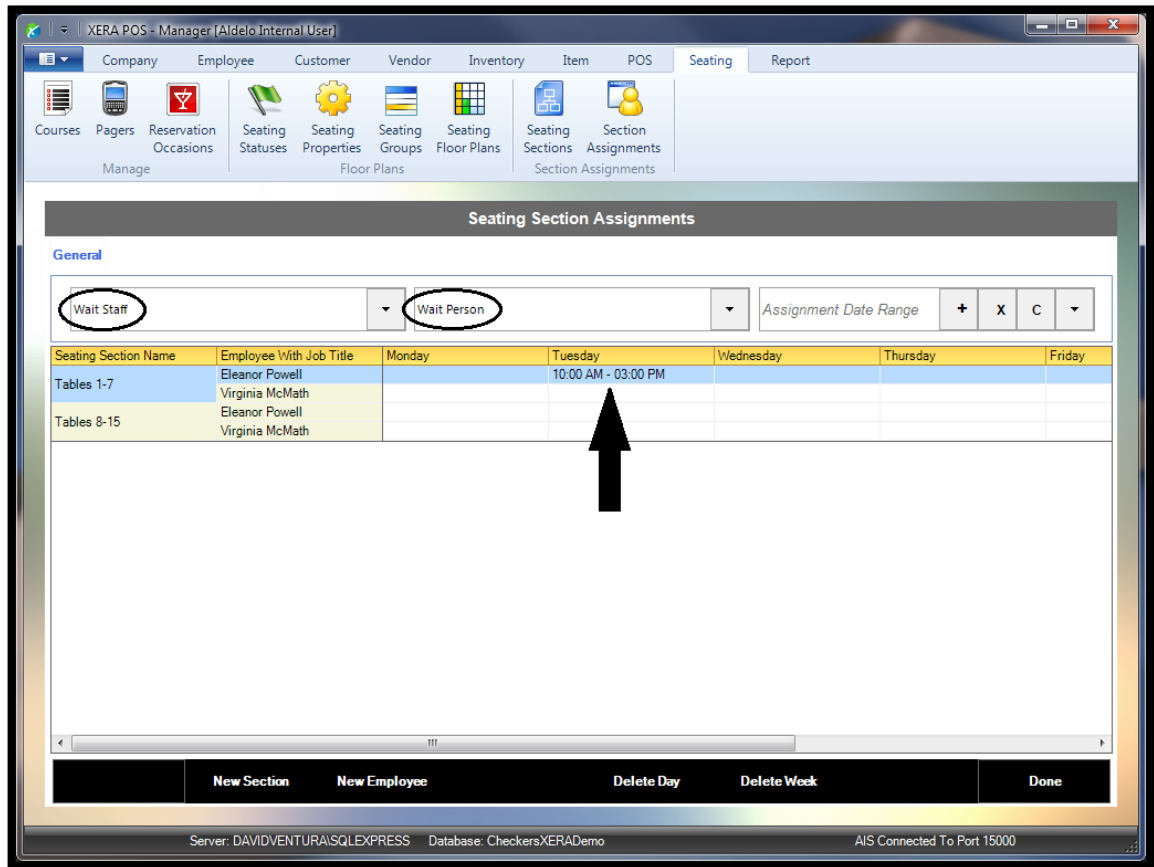


Figure 31-2

Repeat the procedure for each additional day of the week for which you wish to assign the selected employee to a seating section. To copy an existing seating section assignment to a different day of the week, left-click the source assignment time range with your mouse and drag it to the desired day in the grid. Section assignment times may also be copied from one employee to another in this manner.

To delete a previous seating section assignment, double-click it with your mouse, select the assignment time range from the Section Assignment Schedules screen, and then click the *Delete Selected Assignment Schedule* button. The section assignment time range is immediately deleted from the grid.

To remove all seating section assignments from a particular day of the week, select any seating section assignment from the desired day by clicking on it in the grid and then click the *Delete Day* button. The Delete Assignment Schedules for Selected Day screen appears. Click the *YES ... Permanently Delete Selected Day's Schedules Now* button to complete the deletion.

To remove all seating section assignments from an entire week, select any seating section assignment from the desired week by clicking on it in the grid and then click the *Delete Week* button. The Delete Assignment Schedules for Selected Week screen appears. Click the *YES ... Permanently Delete Selected Week's Schedules Now* button to complete the deletion.

For our training purposes, we will not make any section assignments and will leave these settings at their default values.

When finished, click the *Done* button to exit the Seating Section Assignments screen.

Chapter 32 — Reports

Overview

The Overview section contains the *Dashboard* Tab. This tab displays the Sales Dashboard report.

DASHBOARD

The Sales Dashboard report gives the user a broad overall view of the business's sales grouped in various manners. This report displays overview charts, sales reports, payment reports, activity reports, and labor reports for the selected date range. This information may be grouped in various ways to present a high level overview of the business's recent history.

Report Categories

Reports in XERA® POS are broken down into several categories. For each category of report, the settings required to generate the report are identical.

REVENUE

Revenue reports display the revenue received by a business from the sale of products and services. These sales may be grouped in various ways to give a detailed view of the sources of the revenue.

FINANCIAL

Financial reports display information related to the flow of revenue into and out of the business. This information may be grouped in various ways to give a detailed view of the business's financial position.

ANALYSIS

Analysis reports display information related to the performance of the business over a period of time. These reports typically include averages to give the user a picture of the business's performance over the selected time period. This information may be filtered and sorted in various ways to help the user predict how the business will perform in the future.

CUSTOMER

Reserved for future use.

EMPLOYEE

Employee reports display information related to your staffing and labor issues. These reports typically include averages to give the user a picture of the business's employee related data over the selected period of time. This information may be filtered and sorted in various ways to give a detailed view of your labor situation.

INVENTORY

Reserved for future use.

LIST

List reports contains only a single report: the Part Count List Report. This report displays the information that was entered under the Product Tab of the Items List for each item where the Part Count information has been setup. The Part Count information deals with items that are sold as multiples or fractions of a standard menu item size.

For example, if ribs are sold in quantities of six individual bones, then a half order would consist of three bones and a double order would consist of twelve bones. The Part Count List Report is categorized by the Part Count Unit Name, with each item that is sold listed under that category. The additional information for each item appears to the right of the item name on the report.

SECURITY

Security reports display transaction information of a sensitive nature that could be deemed suspicious when carried out in unusually large numbers. As with the other reports, this

information may be filtered and sorted in a variety of ways to deliver the exact information desired. It is up to the manager to use this information as he sees fit.

Auto Report Test

The Auto Report Test feature allows the user to setup a maximum of twenty-five reports to be generated at specific intervals and e-mailed to one or more recipients automatically, without the need for user intervention.

Please note that the use of this feature is setup in the XERA® POS Manager application by navigating to **Company Tab > Store Settings > Report Settings** and then entering the appropriate information for the relevant auto report settings.

PERFORM TEST

Once you have setup the auto report feature under the Company Tab of the XERA® POS Manager application, click the *Perform Test* button to manually generate an auto report. The Auto Report Test Triggered message displays, indicating that the report has been generated and successfully e-mailed to the selected recipients. Click the *OK* button to dismiss the message.

Creating Reports

For additional information on the creation of reports under the Report Tab, please see the chapter titled “Report Categories” in the XERA® POS Manager Manual.

Chapter 33 — XERA® POS Login Screen

Login Screen

Upon starting XERA® POS, the first screen to display is the Login screen. The Login screen displays a virtual numeric keypad for entry of the user's access code. The Login screen also displays the current date, the current time, and the terminal name/number of the computer. In addition, the user may access the virtual Alpha-Numeric Keyboard, the Gift Card feature, the Terminal Configuration feature, and exit XERA® POS from the Login screen (See Figure 33-1).

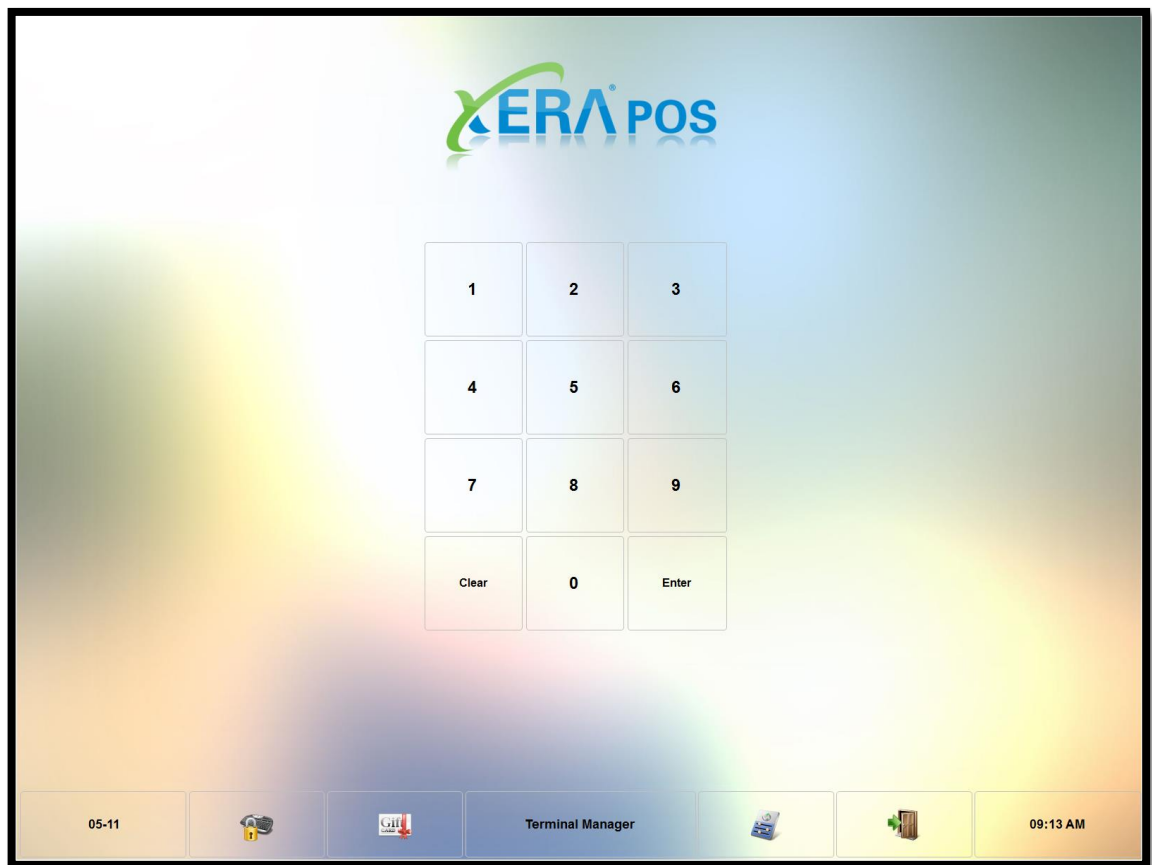


Figure 33-1

LOGGING IN

Upon starting XERA® POS, the first thing you must do before anything else is login. If you are a salaried employee, you may be able to login any time you wish; however, if you are an hourly employee, you might not be allowed to login until your scheduled time.

To login, follow one of the two procedures below:

1. If your access code consists of numeric characters exclusively, enter the access code into the virtual numeric keypad displayed on the Login screen. When finished entering the access code, click the *Enter* button to login (See Figure 33-2).



Figure 33-2

2. If your access code contains both numeric and alpha characters, display the virtual Alpha-Numeric Login keyboard by clicking the *Login* button at the bottom of the Login screen (See Figure 33-3).



Figure 33-3

- Use the virtual keyboard to enter your user name and access code in the appropriate fields and then click the *OK* button to login (See Figure 33-4).

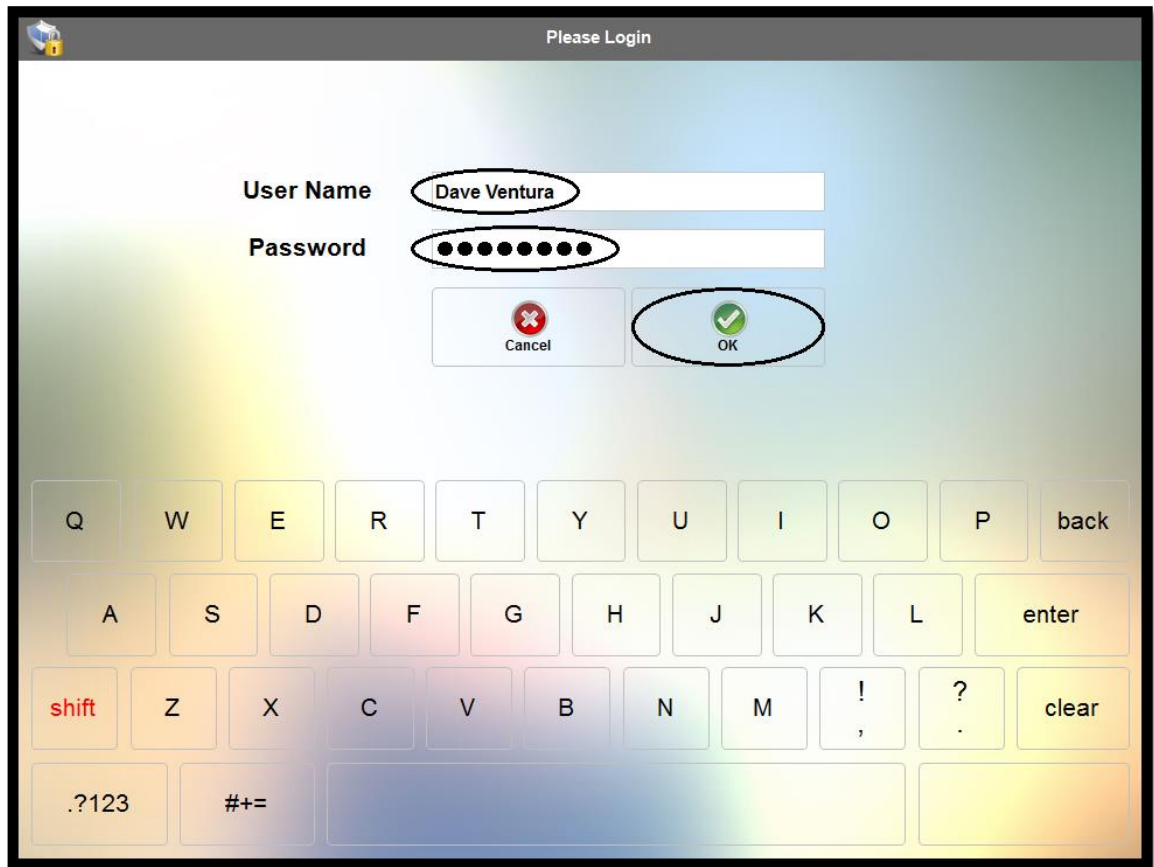


Figure 33-4

If the employee has more than one job type that he performs, the access code that corresponds with the job to be performed on the current shift must be entered. If the work schedule is enforced, the access codes for the employee's other job types are locked out, preventing the employee from entering the wrong access code.

GIFT CARD VERIFICATION

The remaining value of a gift card that is issued by your credit card processor may be verified by entering your access code and then clicking the *Gift Card Verification* button at the bottom of the Login screen (See Figure 33-5).



Figure 33-5

Next, swipe the gift card through your MSR (Magnetic Stripe Reader) device to display the remaining balance. If the transaction is successful, the remaining balance appears on the Gift Card Balance Inquiry Successful window. When finished checking the card balance, click the *OK* button on this window to continue (See Figure 33-6).

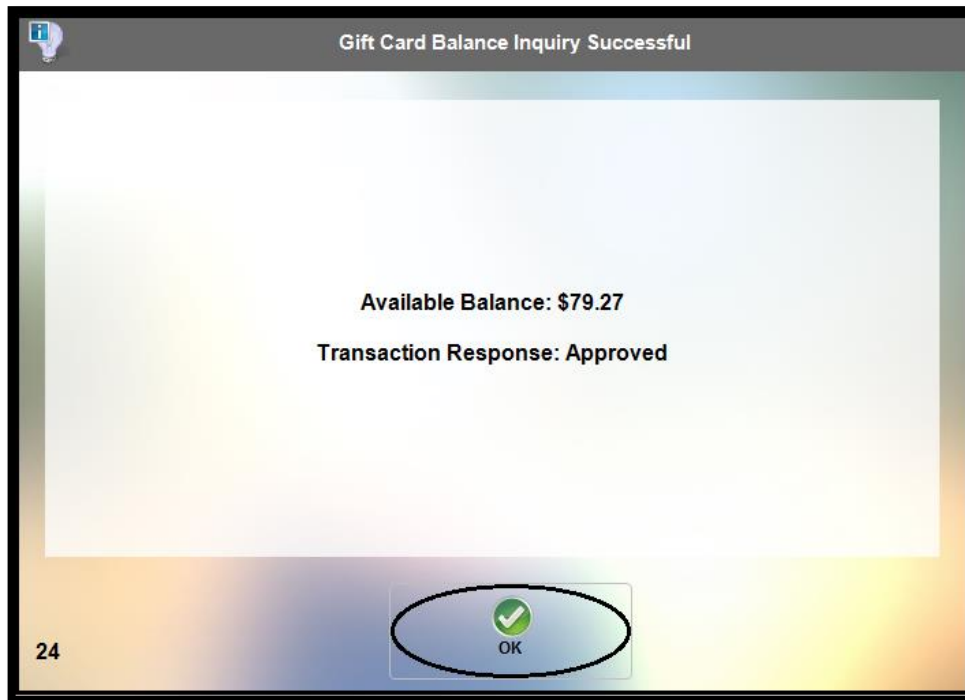


Figure 33-6

TERMINAL CONFIGURATION

The Terminal Configuration feature allows the user to set both the primary and backup data sources in XERA® POS. To open the Terminal Configuration feature, enter your access code into the virtual numeric keypad on the Login screen and then click the *Terminal Configuration* button at the bottom of the Login screen (See Figure 33-7).



Figure 33-7

The Terminal Configuration Data Entry screen displays (See Figure 33-8).

 The screenshot shows a web-based configuration interface. At the top, there are three buttons: 'Refresh Settings', 'Load Balanced Printers', and 'OK'. Below these are three status boxes: 'Terminal Device Name: DAVIDVENTURA', 'Terminal IP Address: 172.26.16.11', and 'AIS Connection Status: Connected To Port 150...'. The main area is split into two columns. The left column is titled 'Primary Data Source' and the right is 'Backup Data Source'. Each column has five configuration fields: 'SQL Server Instance', 'Authentication Type', 'User Name', 'Password', and 'SQL Database Name'. At the bottom of each column are 'Test' and 'Connect' buttons.

Figure 33-8

Follow the steps below to setup or change your data source settings.

Refresh Settings

The *Refresh Settings* button allows the user to refresh the POS application with any changes that have been made through the XERA® POS Manager application while the POS application was running. Simply click the button to reload the settings.

Load Balanced Printers

Select the *Load Balanced Printers* button to turn on or off the load balanced printers feature of XERA® POS. Toggling the button alternately turns the feature on and off. Please see the XERA® POS Manager Manual for information about the setup this feature.

OK

Click the *OK* button after making any changes on this screen to save your changes and exit the Terminal Configuration screen.

Primary Data Source vs. Backup Data Source

Please note that the *Primary Data Source* is set by using the green-labeled buttons on the left side of the screen. The *Backup Data Source* is set by using the red-labeled buttons on the right side of the screen. The settings described below are identical for both.

SQL Server Instance

Click this button to display the Select SQL Server Instance screen. Choose the appropriate instance from the list displayed on this screen. Contact your XERA® POS authorized reseller or your database administrator if you need help determining which SQL server instance to select.

Authentication Type

Click the *Authentication Type* button to display the Select Authentication Type window. Choose either *Windows Authentication* or *SQL Authentication* from this window by clicking on the appropriate button (See Figure 33-9).

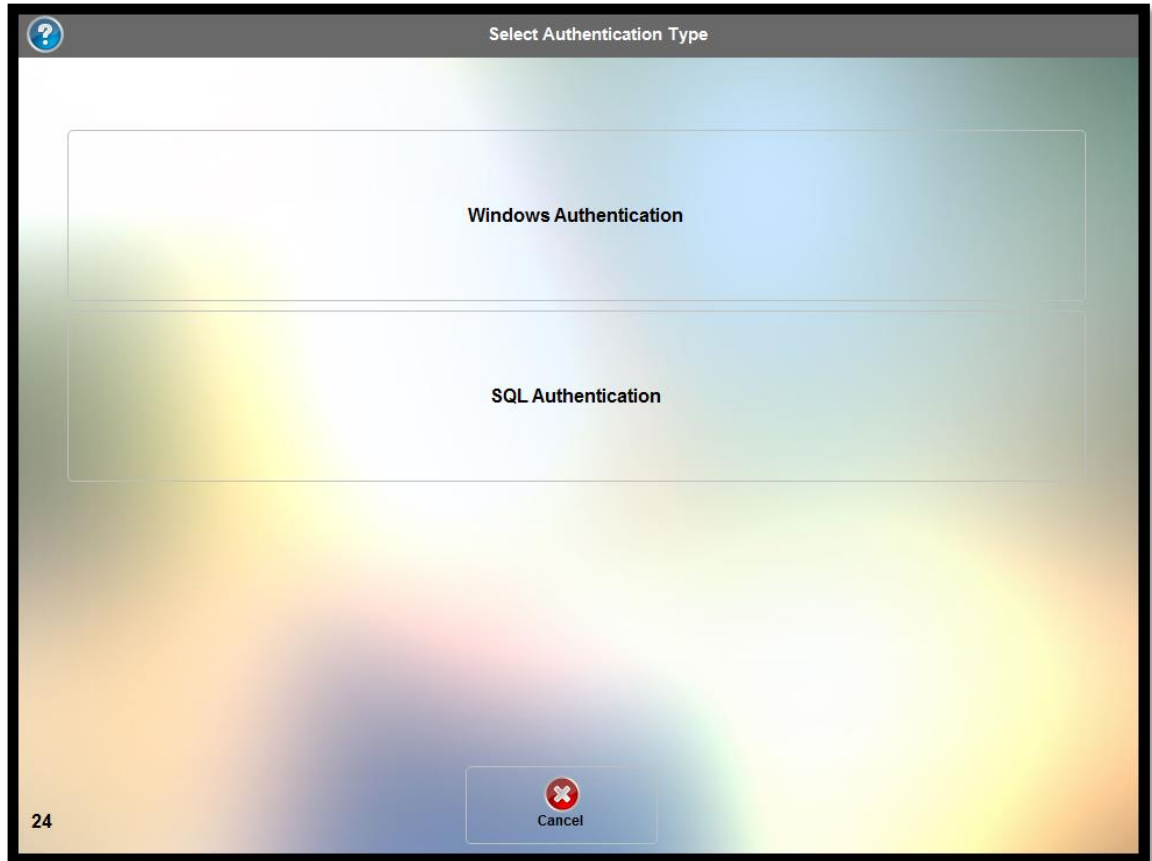


Figure 33-9

Contact your XERA® POS authorized reseller or your database administrator if you need help determining which authentication type to select.

User Name

If you selected SQL Authentication under Authentication Type (above), click the *User Name* button and enter your user name via the on-screen virtual keyboard that displays. Click the *OK* button on the keyboard when finished to save your changes. Contact your XERA® POS authorized reseller or your database administrator if you do not know your user name or you need to create a new user name.

Please note that the user name and password are only required when using SQL authentication.

Password

If you selected SQL Authentication under Authentication Type (above), click the *Password* button and enter the password that goes along with the user name you entered above. Enter the password via the on-screen virtual keyboard that displays. Click the *OK* button on the keyboard when finished to save your changes. Contact your XERA® POS authorized reseller or your database administrator if you do not know your password or you need to create a new password.

Please note that the user name and password are only required when using SQL authentication.

Test

After entering all of the required information as listed above, click the *Test* button. XERA® POS attempts to connect to Microsoft SQL Server. If the connection is made, the SQL Connection Test Successful message appears (See Figure 33-10).



Figure 33-10

SQL Database Name

Once you have successfully connected to Microsoft SQL Server, click the *SQL Database Name* button to display the Select SQL Database window. Select the database to which you wish to connect by clicking on its button. Please note that the *Test* button must be selected in the previous step before the *SQL Database Name* button because XERA® POS must first connect to SQL Server in order to compile the list of available databases with which to populate the Select SQL Database screen.

Contact your XERA® POS authorized reseller or your database administrator if you need help determining which SQL database name to select.

Connect

Once all of the above selections have been made successfully, click the *Connect* button to connect to the database chosen in the step above. When the connection is made, the Set Data Source Task Successful message displays.

Click the *OK* button to dismiss the message (See Figure 33-11).

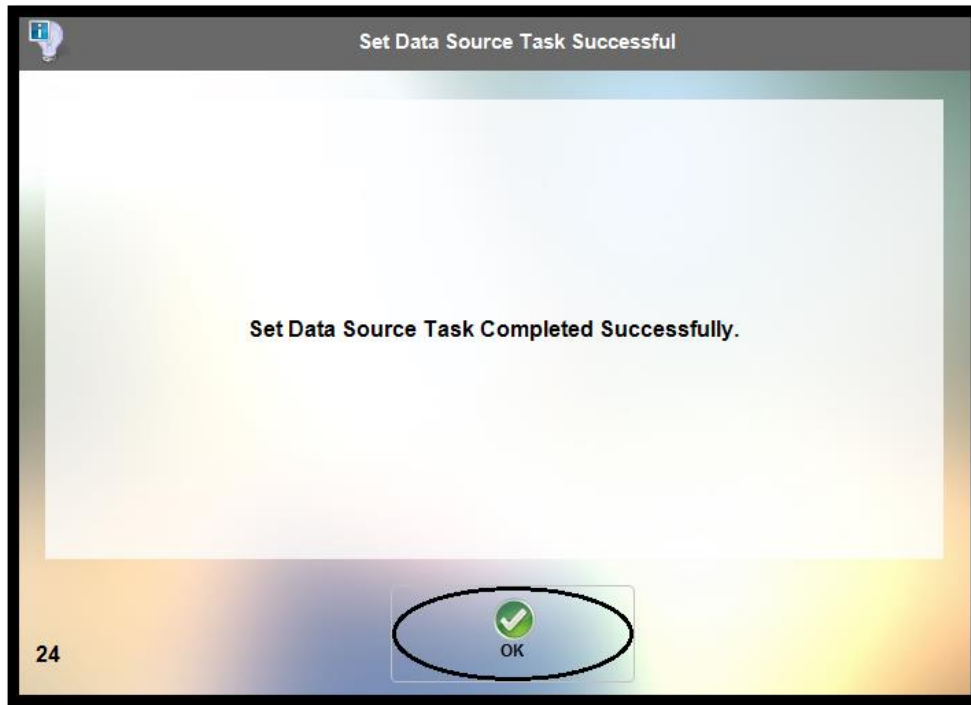


Figure 33-11

EXITING XERA® POS


The software may be exited directly from the Login screen. To do so, click the *Exit* button at the bottom of the screen (the button with the icon of an open door), enter your access code into the virtual numeric keypad that displays, and then click the *Enter* button. The software closes immediately.

STARTING YOUR SERVER BANK

Server Bank

There are two options in XERA® POS for managing settlement transactions: Cash Drawer and Server Bank. Server Bank is used when employees take care of their own money and a cash drawer is not assigned to them. It is often considered as their own personal cash drawer without the physical hardware. Money pouches are often used to carry the cash and change. The one limitation an employee encounters when using Server Bank is that he may not also be a cashier. Only one option may be used at any time.

To enable Server Banking, there are two requirements that need to be setup in the XERA® POS Manager application:

1. Under **Company Tab > Settings > Security Roles > Access Control Tab > Security Objects List**, assign the entire POS – Cashier Tasks security object group to the Assigned Security Objects list on the right side of the screen for the selected security role. To do so, click on *POS – Cashier Tasks* in the Security Objects List and then click the *right arrow* button .
2. Under **Employee Tab > Manage > Employees > Login Accounts Tab > Login Accounts List**, make sure the above selected security role is assigned to one of the employee’s login accounts. If it is not, click the *New Login* button, create a new login account for the employee, and assign the above selected security role to this new login account.

Once Server Banking is enabled for an employee, a *My Server Bank* button appears when the employee logs into XERA® POS and then navigates to **Misc > Cashier**. Clicking the *My Server Bank* button displays the *Sign In* button.

Click the *Sign In* button to display the Cash Count screen (See Figure 33-12).

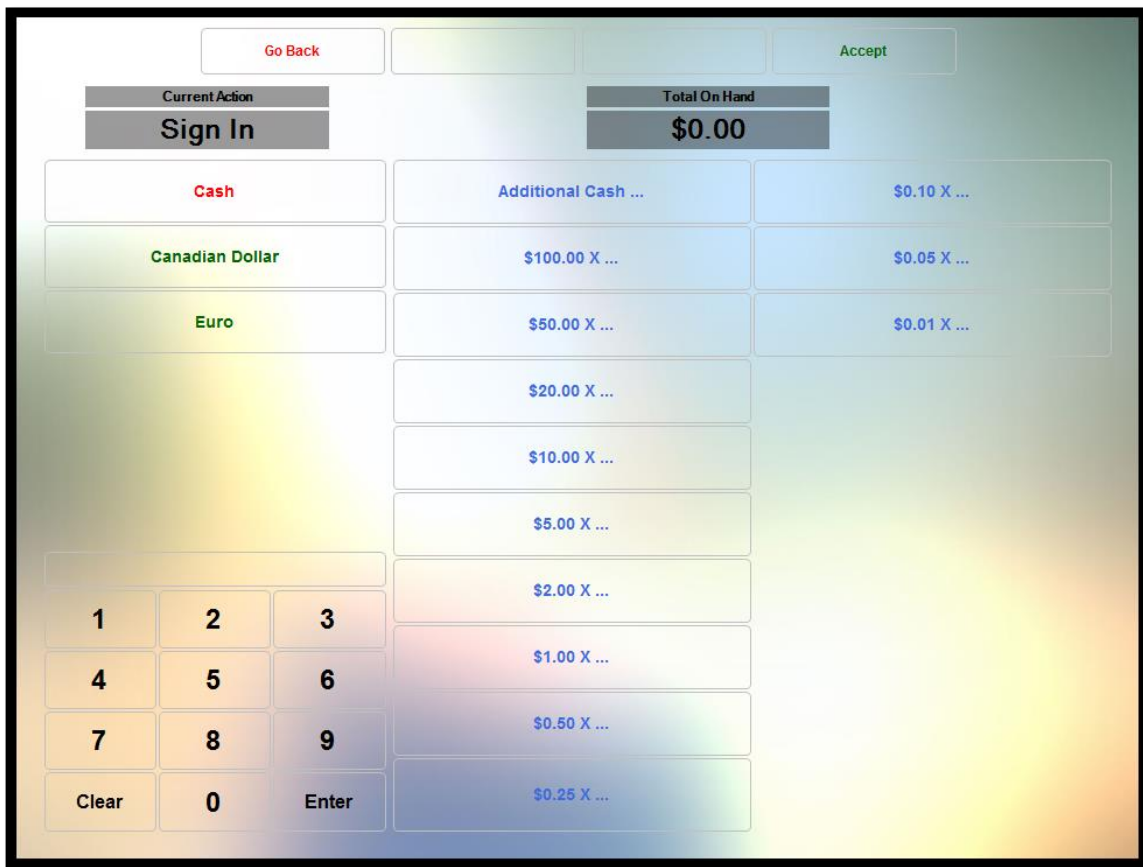


Figure 33-12

Here the employee may enter his beginning server bank cash balance. Follow the steps below to enter your beginning server bank balance:

1. Select the appropriate currency on the left side of the screen.
2. Count the total number of pieces of the first denomination of bills or coins.
3. Click the button on the Cash Count screen that corresponds with that denomination and then use the virtual keypad in the lower left portion of the screen to enter the number of pieces that you counted. XERA® POS automatically calculates the total monetary value (the denomination multiplied by the piece count). If you make an entry error, click the *Clear* button and then re-enter the quantity.
4. Click the *Enter* button when finished to add the count to the total amount on hand. This running total appears near the top of the screen.
5. Repeat the steps above for each denomination of bill and coin that is a part of your beginning balance.
6. To make a correction to a previously accepted count, click the denomination button, enter the correct count, and then click the *Enter* button. To remove a count completely, click the denomination button, enter “0” for the piece count, and then click the *Enter* button.
7. When you finish entering all of your counts and are satisfied that the total on hand is correct, click the *Accept* button to save the count and exit the Cash Count screen.
8. To cancel the beginning server bank count without saving your changes, click the *Go Back* button at the top of the screen.

Please note that, if necessary, different types of currencies may be mixed within the same server bank. XERA® POS calculates the value of the foreign currencies in terms of the local currency (based upon the currency exchange information entered in the XERA® POS Manager application under **Company Tab > Revenue > Tenders**) and displays the total value for all currencies (in terms of the local currency) that are part of the server bank count. Currencies may be setup in the XERA® POS Manager application by navigating to **Company Tab > Revenue > Tenders** and then clicking the *New* button. To create a foreign currency, select *Other* as the Tender Type and then set the currency exchange information.

Please see the XERA® POS Manager Manual for further information.

CASHIER IN

Logging In to your Cash Drawer


The Cash Drawer method for managing settlement transactions is used when a cashier station is employed.

A restaurant may have one or more cashier stations. The cash drawer is attached to a terminal and the transactions are recalled by the cashier and settled on the spot. The cashier station may serve only other employees of the restaurant (for example, the wait staff that collects payments from the customers and takes them to the cashier for settlement) or it may serve the customers directly (for example, when the customer brings his own guest check to the cashier for

settlement on his way out of the restaurant). The cash, personal checks, and credit/debit card receipts collected during the course of the cashier's work shift are stored inside the cash drawer.

The cashier is responsible for collecting the proper amount for each transaction. The cash drawer is reconciled at the end of the cashier's shift to determine if the cashier has collected more than (an overage), less than (a shortage), or exactly the total monetary amount that was billed to the customers.

To enable cashier settlement, complete the following steps:

1. Connect a physical cash drawer to the terminal that you wish to use as a cashier station.
2. In the XERA® POS Manager application under **Company Tab > Settings > Terminal Settings**, click on the *List* Tab. Select the terminal that you wish to setup by clicking on it in the list.
3. Click on the *Main* Tab and then click on the *Settings* Tab.
4. Under the Settings Tab, expand the *POS Peripherals* menu by double-clicking on it.
5. In the POS Peripherals menu, click on the cash drawer that you wish to setup. Next, in the large textbox on the right side of the screen, enter the device URL (Uniform Resource Locator) for this cash drawer. The device URL consists of the IP address and the device name. Optionally, the user name and the user password may also be included. Each part of the device URL is separated by a forward slash. The format for the device URL is "IP address/XERA® POS device name/user name/password." For example, a sample device URL might be "127.000.254.063/cash drawer1/John Doe/password1." Please note that detailed instructions on how to create this entry appear within the textbox itself.
6. Click the *Save* button at the bottom of the Terminal Settings screen.
7. Next, navigate to **Company Tab > Settings > Security Roles** and then click on the *List* Tab. Select the Security role to which you wish to setup access to the cash drawer by clicking on it.
8. Click on the *Main* Tab and then click on the *Access Control* Tab.
9. In the Security Objects List, navigate to and click on **POS – Cashier Tasks > POSApp.CashierTask.CashDrawer"x"**, where "x" is the cash drawer number you wish to enable. Click the *right arrow* button  to assign the security object to the Assigned Security Objects list on the right side of the screen.
10. Click the *Save* button at the bottom of the Security Roles screen and then click on the *Done* button.
11. Finally, be sure to assign the security role selected in step #6, above, to all employees whom you wish to use as cashiers. To do so, navigate to **Employee Tab > Manage > Employees** in the XERA® POS Manager application, click on the *List* Tab, and select the desired employee from the list by clicking on his name. Click on the *Main* Tab and then click on the *Login Accounts* Tab. Make sure the security role has already been assigned to the employee in the Login Accounts List on the left side of the screen. If not, click the *New Login* button, create a new login account for the employee, and assign the security role to this new login account. When finished, click the *Save Login* button.
12. Repeat these steps as necessary to create additional cash drawers and/or additional cashiers.

Once the steps above are complete, a *Cash Drawer "x"* button appears when the employee logs in to XERA® POS and then navigates to **Misc > Cashier**, where "x" is the number of the cash drawer setup previously.

Clicking the *Cash Drawer* “x” button displays the *Sign In* button. Clicking the *Sign In* button assigns the cash tray to the cashier and displays the Cash Count screen (See Figure 33-13).

Figure 33-13

Cash Tray Beginning Count

The cashier must enter his cash tray beginning count into the Cash Count screen. To do so, follow the steps below:

1. Select the appropriate currency on the left side of the screen.
2. Count the total number of pieces of the first denomination of bills or coins.
3. Click the button on the Cash Count screen that corresponds with that denomination and then use the virtual keypad in the lower left portion of the screen to enter the quantity that you counted. XERA® POS automatically calculates the total monetary value (the denomination multiplied by the piece count). If you make an entry error, click the *Clear* button and then re-enter the quantity.
4. Click the *Enter* button when finished to add the count to the total amount on hand. This running total appears near the top of the screen.
5. Repeat the steps above for each denomination of bill and coin that is a part of your beginning balance.

6. To make a correction to a previously accepted count, click the denomination button, enter the correct count, and then click the *Enter* button. To remove a count completely, click the denomination button, enter “0” for the piece count, and then click the *Enter* button.
7. When you finish entering all of your counts and are satisfied that the total on hand is correct, click the *Accept* button to save the count and exit the Cash Count screen.
8. To cancel the beginning cash tray count without saving your changes, click the *Go Back* button at the top of the screen.

Please note that, if necessary, different types of currencies may be mixed within the same cash tray. XERA® POS calculates the value of the foreign currencies in terms of the local currency (based upon the currency exchange information entered in the XERA® POS Manager application under **Company Tab > Revenue > Tenders**) and displays the total value for all currencies (in terms of the local currency) that are part of the cash tray count. Currencies may be setup in the XERA® POS Manager application by navigating to **Company Tab > Revenue > Tenders** and then clicking the *New* button.

To create a foreign currency, select *Other* as the Tender Type and then set the currency exchange information. Please see the XERA® POS Manager Manual for further information.

Chapter 34 — Recall

Upon logging in to XERA® POS, one of the screens that may display first is the Recall screen. Click the *Recall* button at the bottom of the first screen that displays to make sure you are viewing the Recall screen (See Figure 34-1).

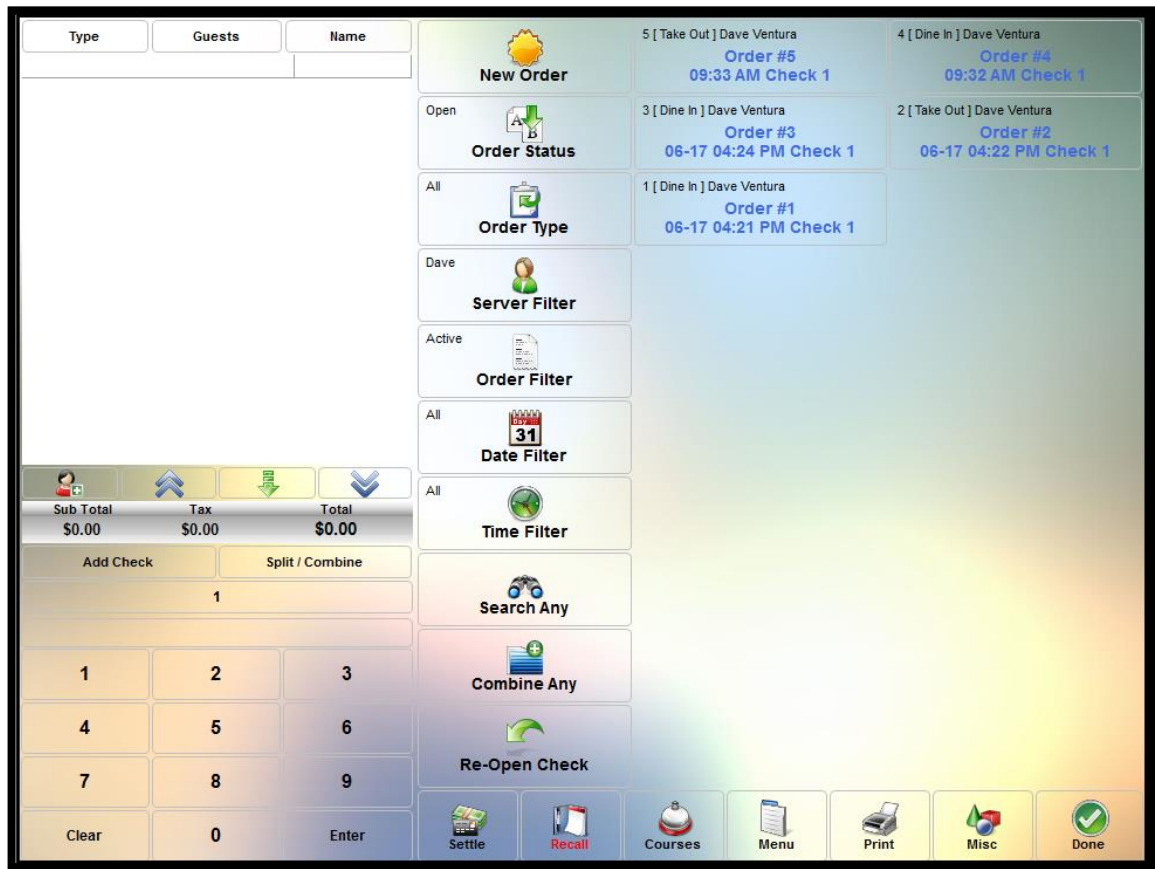


Figure 34-1

The Recall screen contains many options and features. Orders may be recalled based upon the order status, the order type, the server, the date and time of the order, etc. These filters may be used in conjunction with one another to further reduce the list of orders from which to choose. New orders may be created and existing guest checks may be re-opened.

Each of these features under the Recall screen is described in this chapter.

New Order

To create a new order from the Recall screen, click the *New Order* button to display the list of order types that were created in the XERA® POS Manager application.

ORDER TYPES

One button appears for each order type that has been created in the XERA® POS Manager application.

Select the type of order that you wish to create by clicking on the appropriate button (See Figure 34-2).

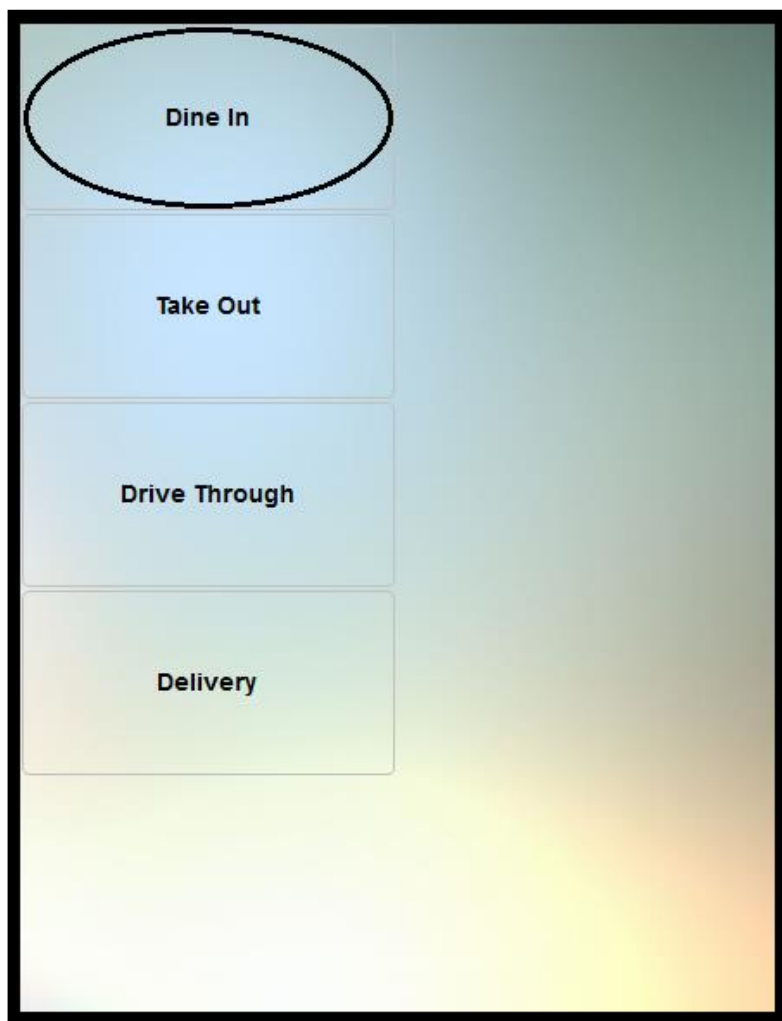


Figure 34-2

Menus

The following screen displays each of the menus that have been created in the XERA® POS Manager application that are assigned to the selected order type during the current date and time period.

Select the desired menu by clicking on the appropriate menu's button (See Figure 34-3).



Figure 34-3

Menu Groups

Upon selecting the appropriate menu, the menu groups display in the left column of buttons. The menu items displayed that are available for ordering depend on the menu group selection. As each menu group button is selected, the menu items to the right of the menu group buttons change to display only those menu items that belong to the selected menu group.

Select the desired menu group and then make your menu item selections from that menu group by clicking on their respective buttons (See Figure 34-4).



Figure 34-4

Menu Item Modifier Selection

If the selected menu item has any modifiers attached to it, they display immediately following the selection of the menu item. The modifier groups display in turn as each is dismissed by the user, either by selecting the maximum number of modifier items from the group or by clicking the *Complete* button.

Click on the desired modifier items in each group to add them to the order (See Figure 34-5).

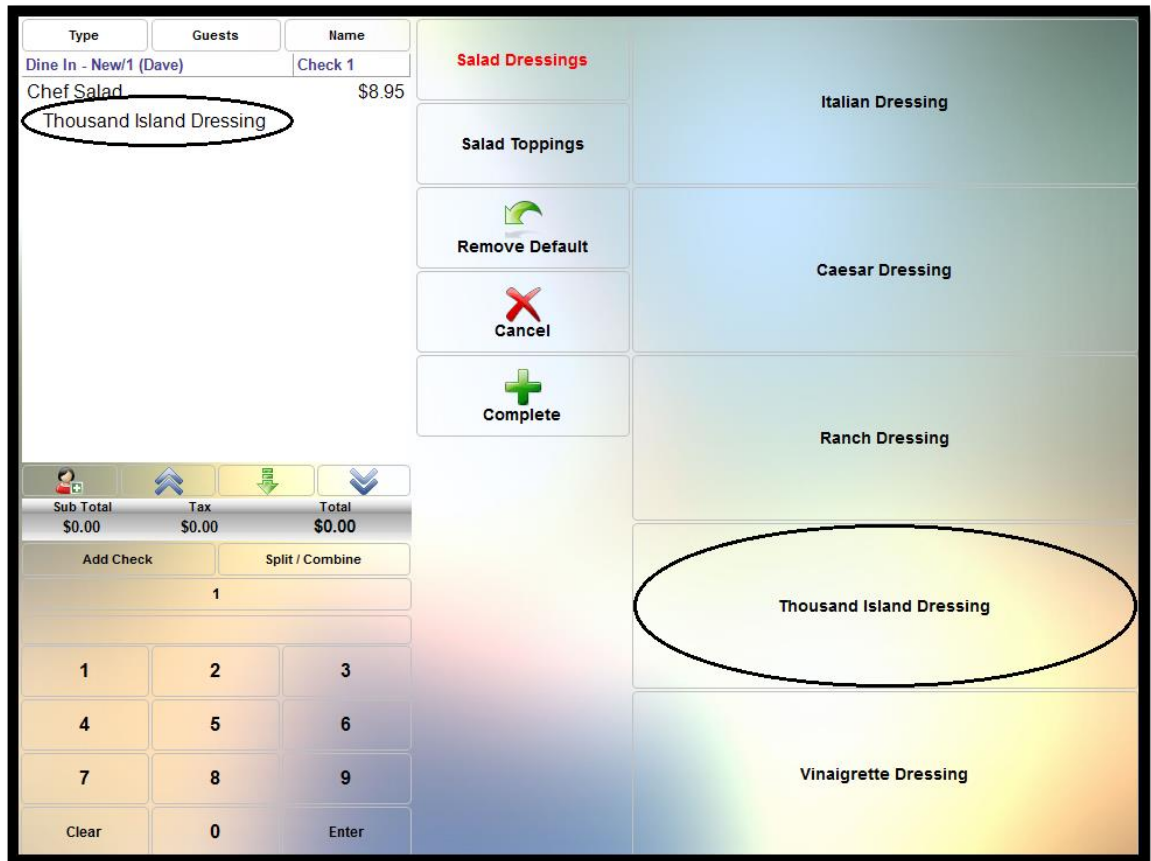


Figure 34-5

Default Modifiers

If you have a menu item that has modifiers attached to it and one or more of those modifiers are ordered by a significant majority of your customers, default modifiers may be created for the menu item.

Default modifiers automatically become a part of the customer's order unless removed by the person who is entering the order. Default modifiers are identified by the green color of the text on the face of the modifier button on the Order Entry screen.

To place an order for a menu item with default modifiers and accept the default modifiers with no changes, simply click the *Complete* button (See Figure 34-6).

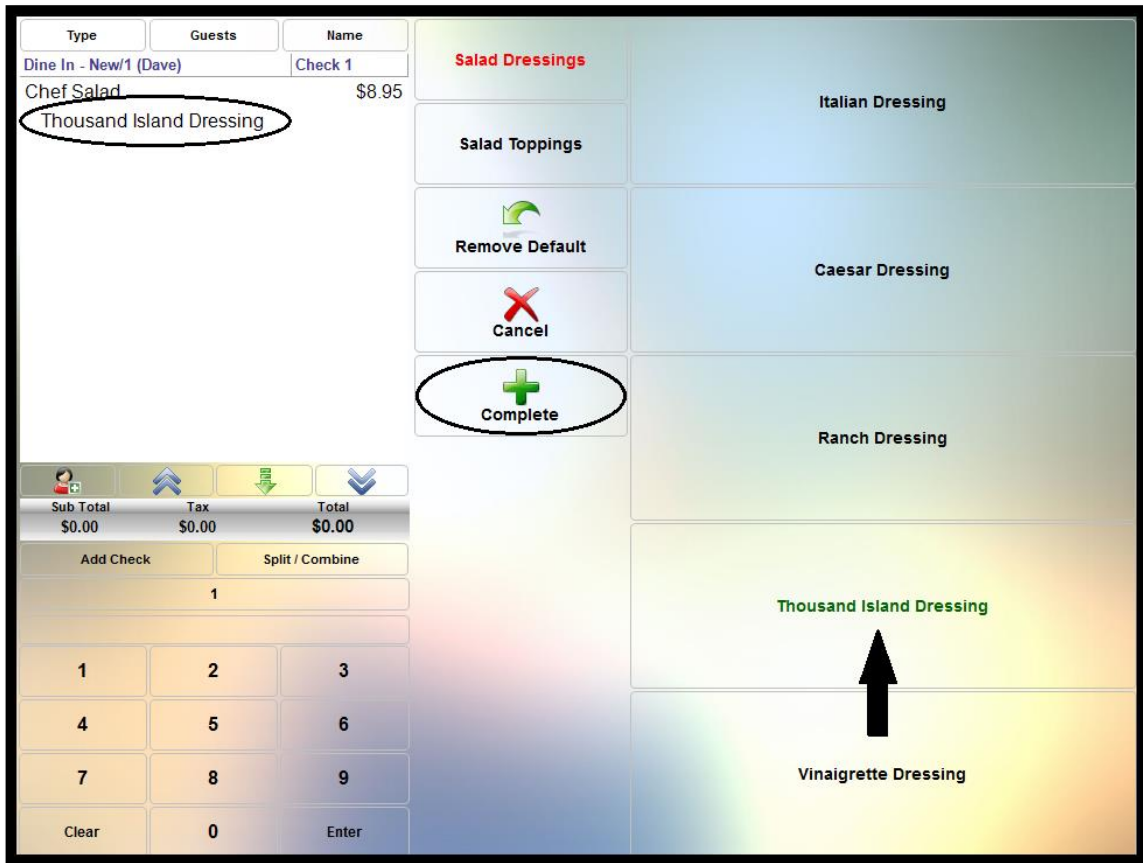


Figure 34-6

Remove Default

If the customer does not wish to order the menu item with the default modifier, it may be removed by clicking the *Remove Default* button and then clicking on the modifier to be removed (See Figure 34-7).

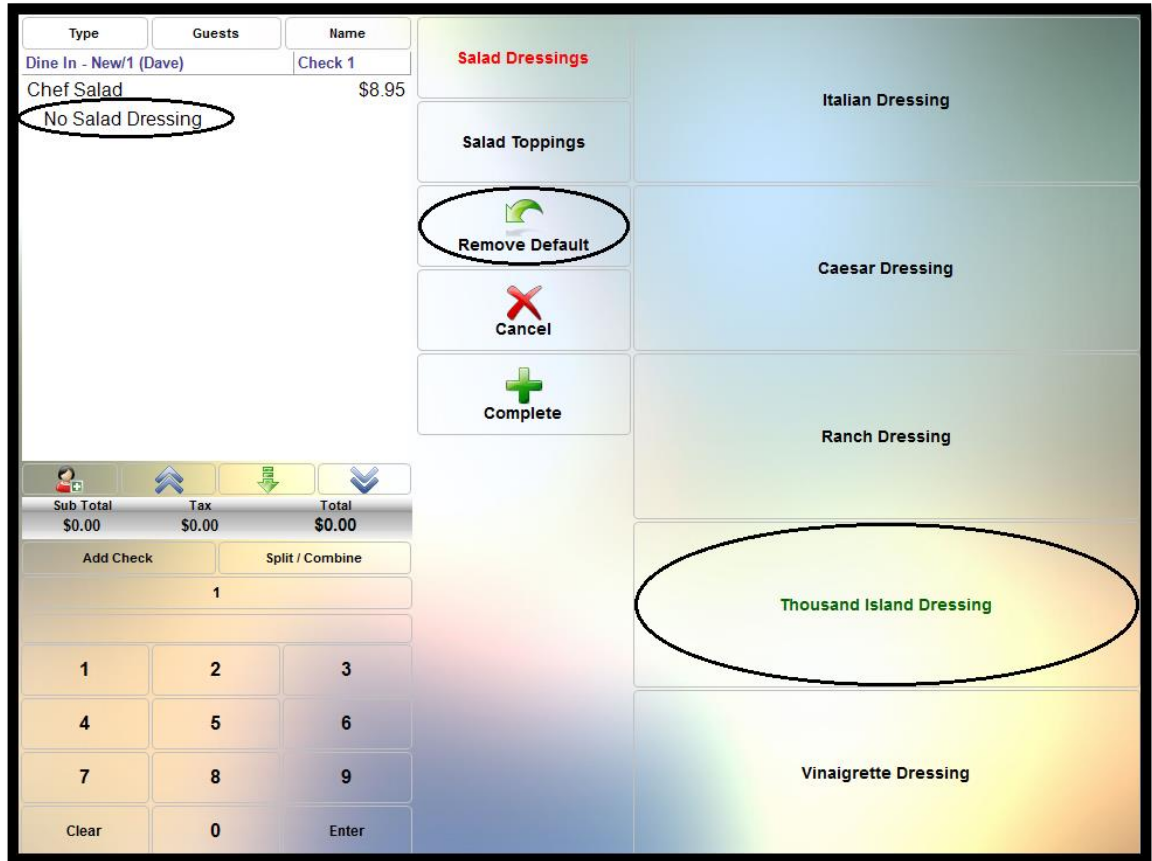



Figure 34-7

Please note that when a default modifier item is removed in this manner, it must be replaced by another item that has been preselected as a replacement for the default modifier; otherwise the guest check will still display the name of the default modifier.

Whenever you have a default modifier, you should create an item to use as its replacement. This is setup in the XERA[®] POS Manager application by navigating to **Items Tab > Items** and creating the replacement item just as you would any other item.

Next, navigate to **POS Tab > Modifiers > Modifier Groups** and select the appropriate modifier group by double-clicking on it in the list. Click on the *Designer* Tab to display the modifiers in the designer.

Now double-click in the button grid on the modifier item that you wish to use as the default modifier. This displays the Edit Modifier Details screen. Select the *Selected by Default* checkbox and then click the *plus*  button in the De-Selected Item field. Find your replacement item in the items list, click on it, and then click the *Select* button to assign the selected item as your replacement for the default modifier item.

Alternatively, if the customer wishes to order the item with a different modifier than the default modifier, simply click on the desired modifier. This action substitutes the selected modifier for the default modifier (See Figure 34-8).

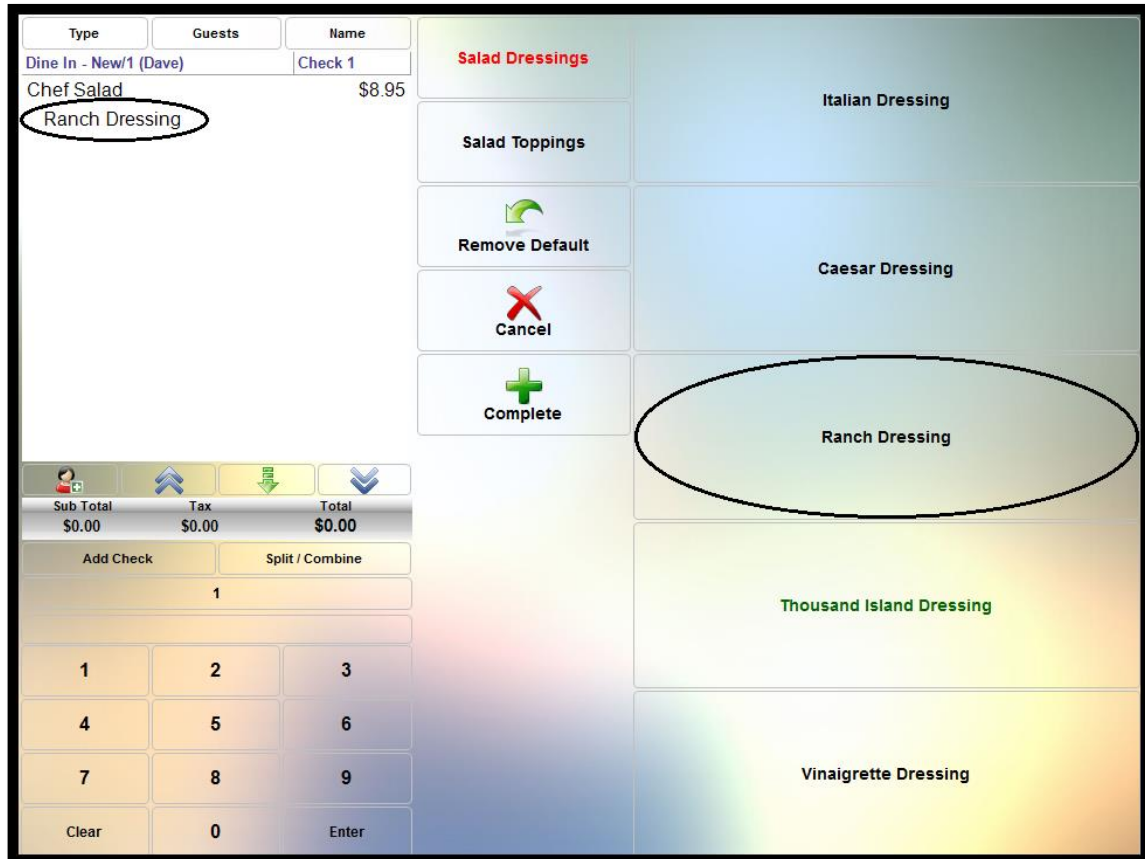


Figure 34-8

Cancel

Click the *Cancel* button to return to the previous screen.

Complete

The *Complete* button has two uses. First, it is used to accept the default modifiers attached to a menu item and place the order for the item. Second, it is used to place the order for a menu item that has multiple modifiers attached to it when all of the desired selections have been made.

For example, if the customer is allowed to select up to three modifiers for a baked potato, the order is placed automatically when the third modifier is selected. However, if the customer wishes to order a baked potato with only two modifiers, the *Complete* button must be clicked after the second modifier is entered to indicate that the order for the menu item is complete; otherwise, the software waits for the third modifier to be entered before adding the menu item to the guest check.

Click the *Complete* button in these two cases to continue with the customer order.

Order Status

Click the *Order Status* button to display the Select Order Status window. Here the user may filter the list of orders to display only the type of order that he is seeking. Open orders, settled orders, and voided orders may be displayed by clicking on their respective buttons in the Select Order Status window.

Click the *Cancel* button to exit the Select Order Status window without making any changes (See Figure 34-9).

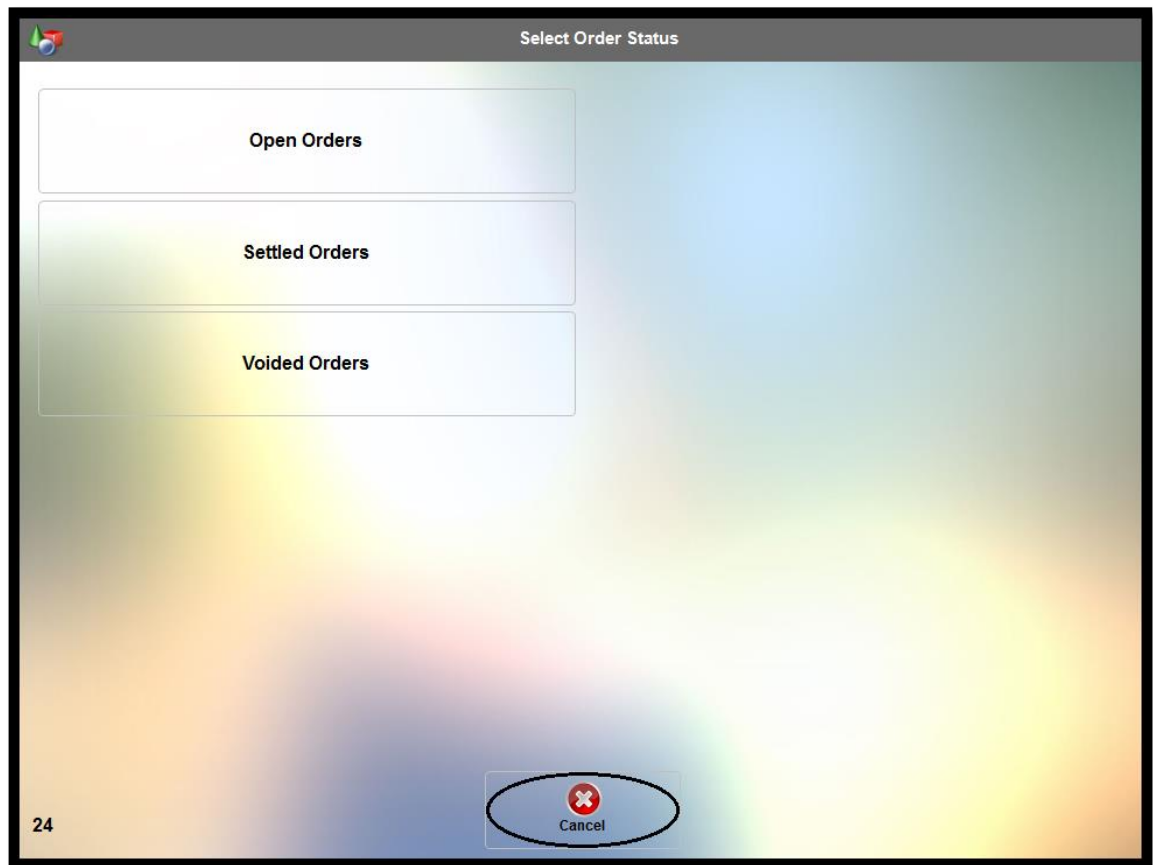


Figure 34-9

Order Type

Click the *Order Type* button to display the Select Order Type window. Here the user may filter the list of orders to display only the type of order that he is seeking. Buttons appear in this window that correspond with each type of order that is created in the XERA® POS Manager application.

Each of the order types may be displayed by clicking on their respective buttons in the Select Order Type window. In addition, an *All* button allows the user to display a list of all order types.

Click the *Cancel* button to exit the window without making any changes (See Figure 34-10).

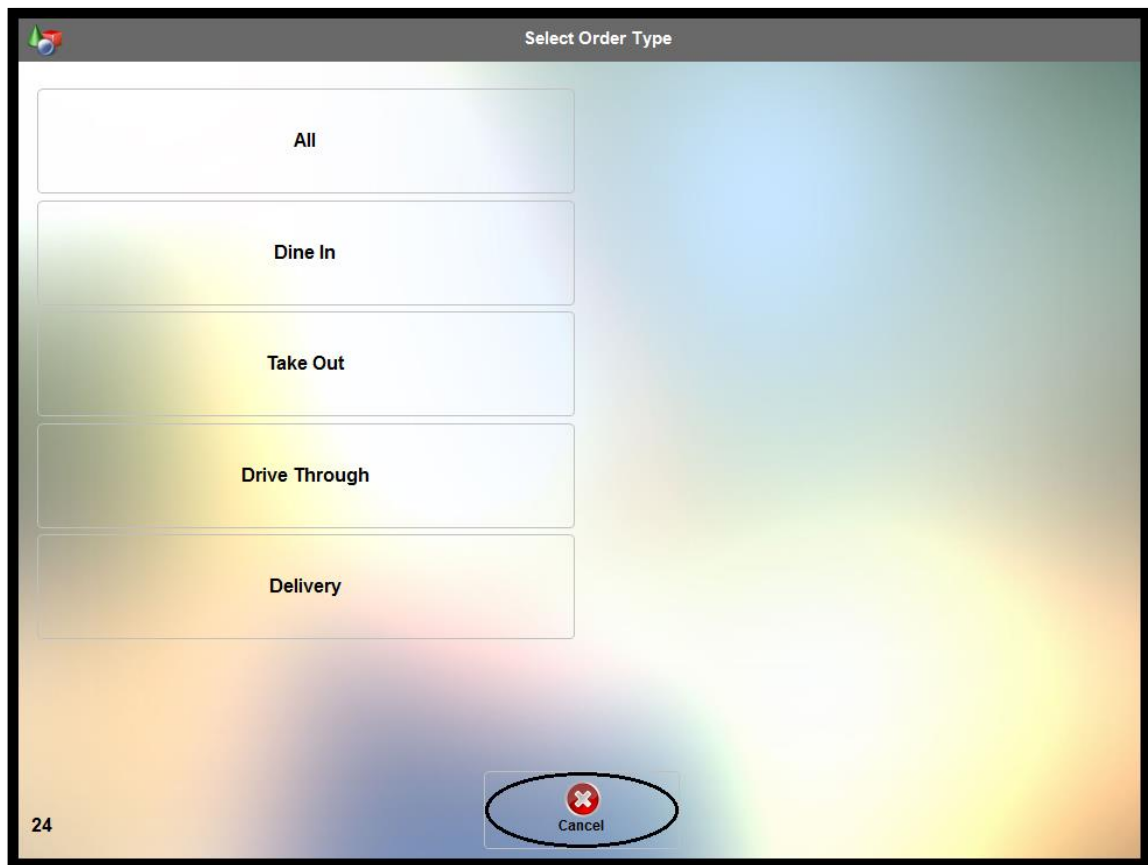


Figure 34-10

Order types may be created in the XERA® POS Manager application by navigating to **Company Tab > Operations > Order Types**, clicking the *New* button at the bottom of the screen, and then entering the required information. Be sure to save the order type when finished.

Server Filter

Click the *Server Filter* button to display the Select Server Filter Option window. Here the user may filter the list of orders to display only the orders that belong to a specific server. Buttons appear in this window that correspond with each employee.

Each of the employees' orders may be displayed by clicking on their respective buttons in the Select Server Filter Option window. In addition, an *All* button allows the user to display a list of orders that belong to all servers.

Click the *Cancel* button to exit the window without making any changes (See Figure 34-11).

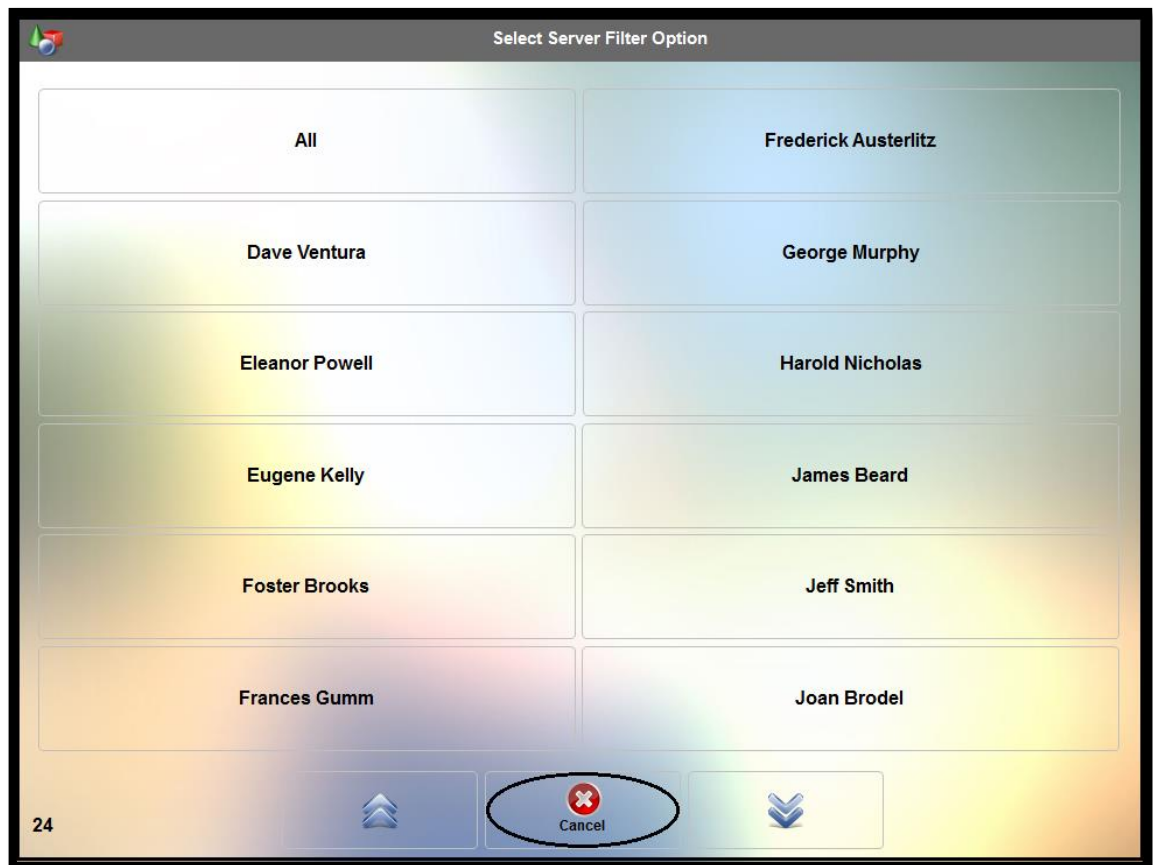


Figure 34-11

Servers may be created in the XERA® POS Manager application by navigating to **Employee Tab > Manage > Employees**, clicking the *New* button at the bottom of the screen, and then entering the required information. Make sure you assign the security role that contains all of the security objects that you wish to assign to a server to this employee. Be sure to save the employee when finished.

Order Filter

Click the *Order Filter* button to display the Select Order Filter Option window. Here the user may filter the list of orders to display only the type of order that he is seeking.

Active orders, inbound orders, or outbound orders may be displayed by clicking on their respective buttons in the Select Order Filter Option window. Inbound and outbound orders are those being transferred to or from one server to another.

Click the *Cancel* button to exit the window without making any changes (See Figure 34-12).

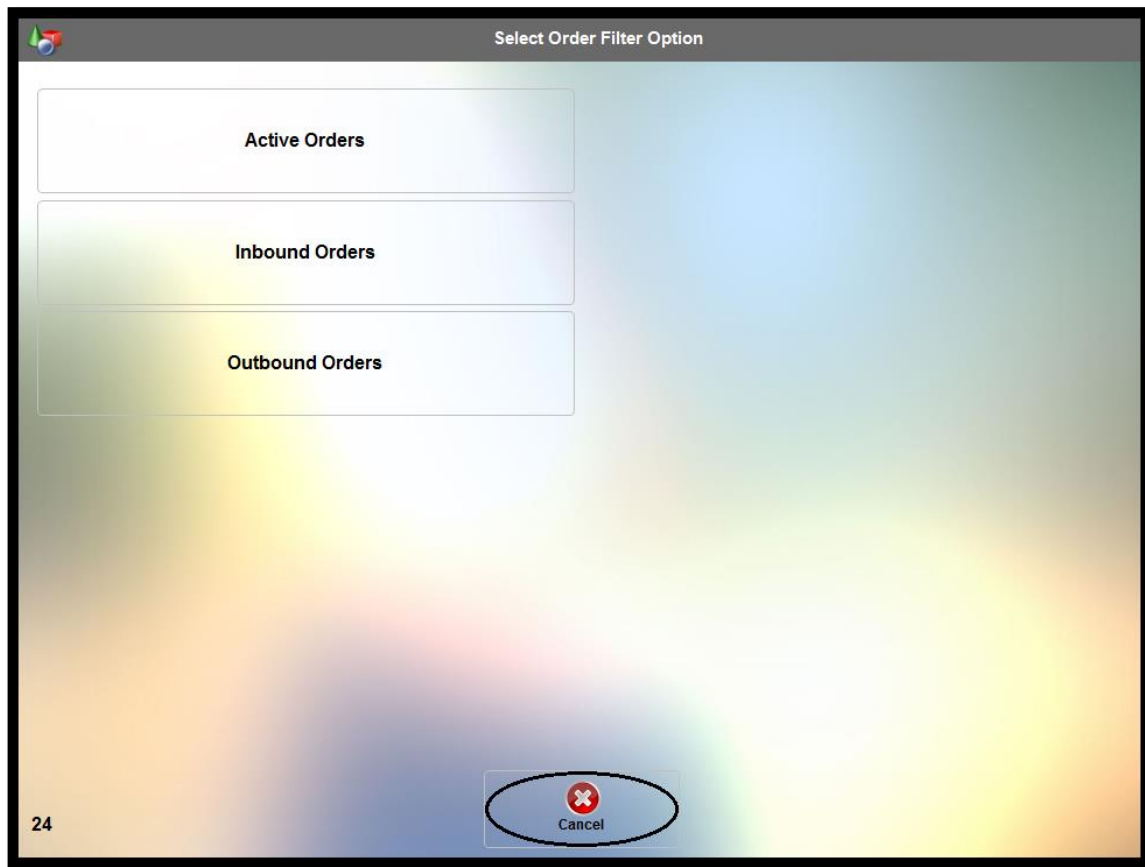


Figure 34-12

Date Filter

If you wish to filter the list of orders to display only those from a specific date, click the *Date Filter* button to display the Select Recall Date window. Click the *Today* button if you wish to search for an order that was created on the current date.

To search for an order from a different date, select the date by using the *up arrow* and *down arrow* buttons to adjust the month, day of the month, and year until the desired date displays.

To remove a previously selected date from the filter, click the *No Date Filter* button to display orders from all dates.

When finished, click the *OK* button to save your changes, exit the Select Recall Date window, and display the filtered list of orders.

Click the *Cancel* button to exit the Select Recall Date window without making any changes (See Figure 34-13).

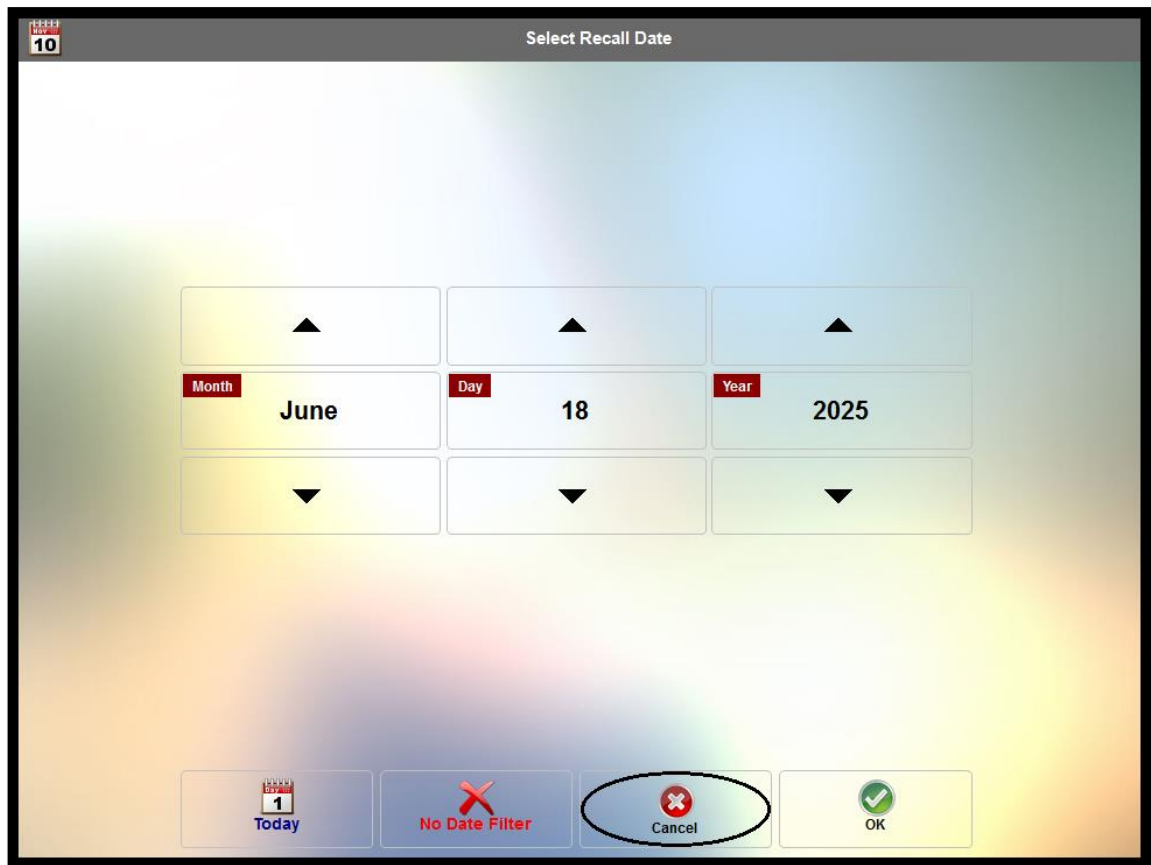


Figure 34-13

Time Filter

If you wish to filter the list of orders to display only those from a specific time range of day, click the *Time Filter* button to display the Select Time Range window.

Next, select the button that corresponds with your desired time range of day. The time ranges available are self-explanatory. Selecting the *All* button displays all of the available orders for the day.

Click the *Cancel* button to exit the Time Filter window without making any changes (See Figure 34-14).

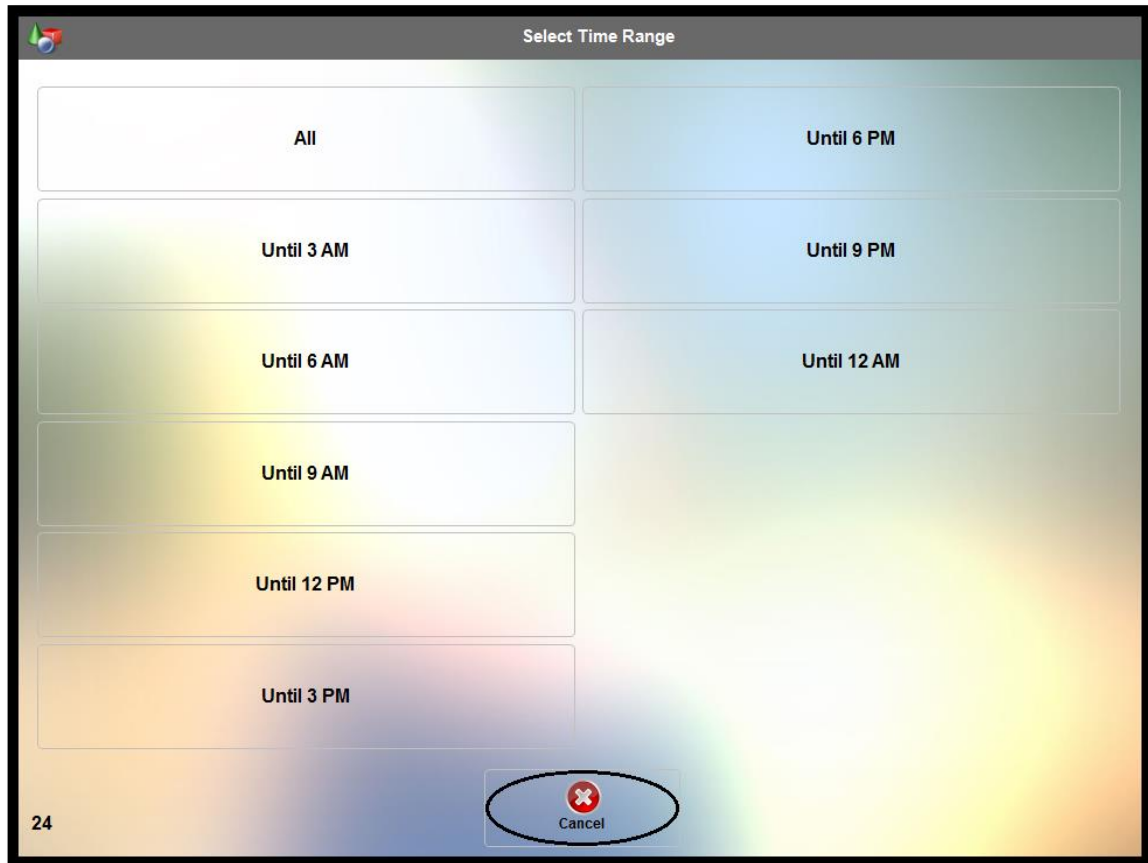


Figure 34-14

Search Any

Click the *Search Any* button if you wish to search for a specific order by any of several methods. Clicking the *Search Any* button opens the Search screen. Select the method by which you wish to search for your desired order by clicking on the appropriate button in the grid.

Next, enter the search text (numeric or alpha, as determined by the selected search method) via the virtual keyboard at the bottom of the screen.

Finally, click the *Search* button to perform the search (See Figure 34-15).

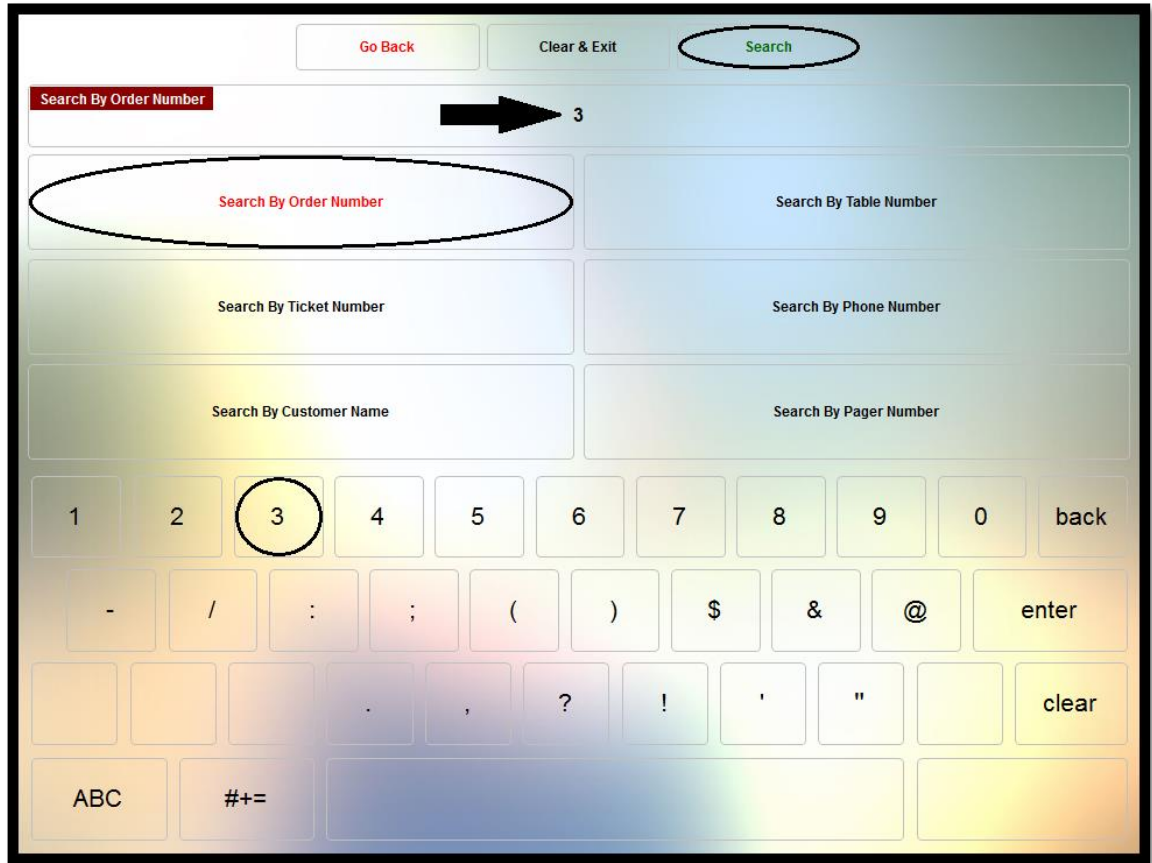


Figure 34-15

If found, the order appears as a button on the Recall screen. Click this button to recall the order and display it in the virtual guest check panel.

Combine Any

The *Combine Any* button allows the user to combine two or more orders into a single order.

To do so, first recall one of the orders so that it displays in the virtual guest check panel on the left side of the screen.

Next, click the *Combine Any* button and then click the button on the right side of the screen that corresponds with the order that you wish to combine (See Figure 34-16).



Figure 34-16

The order you just selected appears on the screen as a virtual guest check. Click the *Accept* button to confirm the combination of the two orders (See Figure 34-17).

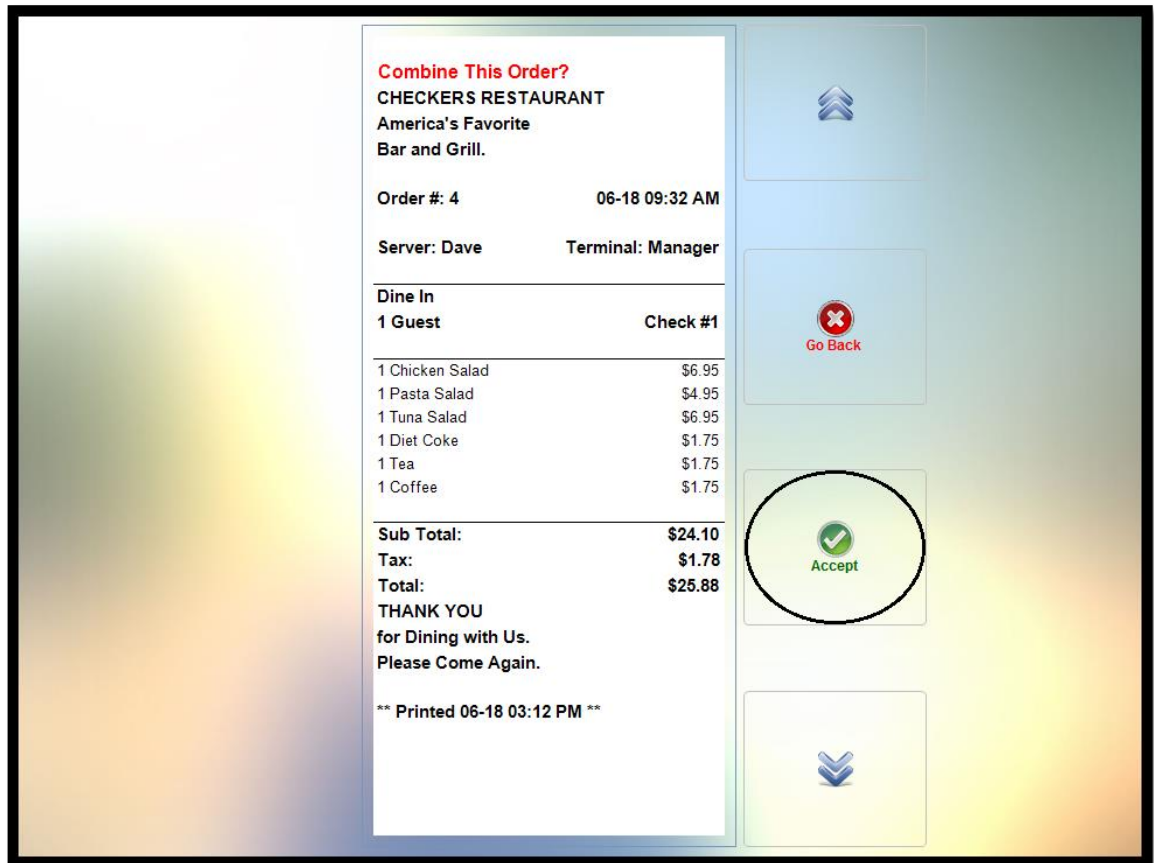


Figure 34-17

To combine additional orders with this newly combined order, recall the combined order and then repeat the steps above to combine another order with it.

Re-Open Check

The *Re-Open Check* button is used to re-open a guest check that has previously been settled.

To do so, recall the settled guest check by using the Order Status feature to display only settled orders. If necessary, click the *Server Filter* button and select the appropriate server from the list to display the settled orders belonging to the selected server. In the list of orders that displays, find the order that you wish to re-open and click on it to display it on the left side of the screen.

Next, select the *Re-Open Check* button. The words *Order Settled* disappear from the background of the displayed order and the order is re-opened. Additional menu items may be

added to the order. Click the *Re-Open Check* button again to display the available menus. When you are finished, settle the order again as you normally would.

Please note that if a cashier who has collected any of the payments that were applied to the order in settling it previously has already closed his cash drawer or server bank, then the check may not be re-opened.

Chapter 35 — Settle

Once a customer order is complete, it may be settled at any time. To settle a customer order, it must be recalled so that the order displays in the virtual guest check panel on the left side of the screen (See Figure 35-1).



Figure 35-1

Next, select the *Settle* button to display the tender types that are available for settling the order.

(Please note: Tenders are setup in the XERA® POS Manager application under **Company Tab > Revenue > Tenders**).

From the list of tenders, select the tender type offered by the customer (See Figure 35-2).



Figure 35-2

Settling with Cash

Depending on the tenders that have been entered during the initial setup in the XERA® POS Manager application, cash tenders may be entered in several ways. If the tender selected is of a fixed denomination, then that denomination of currency is deducted from the total amount of the guest check and the change due or remaining balance displays. If a balance remains, select another tender with which to settle the remaining balance.

If the tender selected is simply of the cash type, then the user must enter the amount tendered from the customer by using the virtual keypad that displays under the guest check on the Settle screen. Again, the entered amount is deducted from the total amount of the guest check and the change due or remaining balance displays. If a balance remains, select another tender with which to settle the remaining balance.

If the tender selected is of the exact cash type, then the order automatically settles for the exact amount of the guest check. The guest check shows no remaining balance or change due.

No matter which cash type tender the user selects, once the guest check is settled, the amount tendered, any change due the customer, and the words “Order Settled” now display on the order in the virtual guest check panel on the left side of the screen. The settlement of the order is now complete (See Figure 35-3).

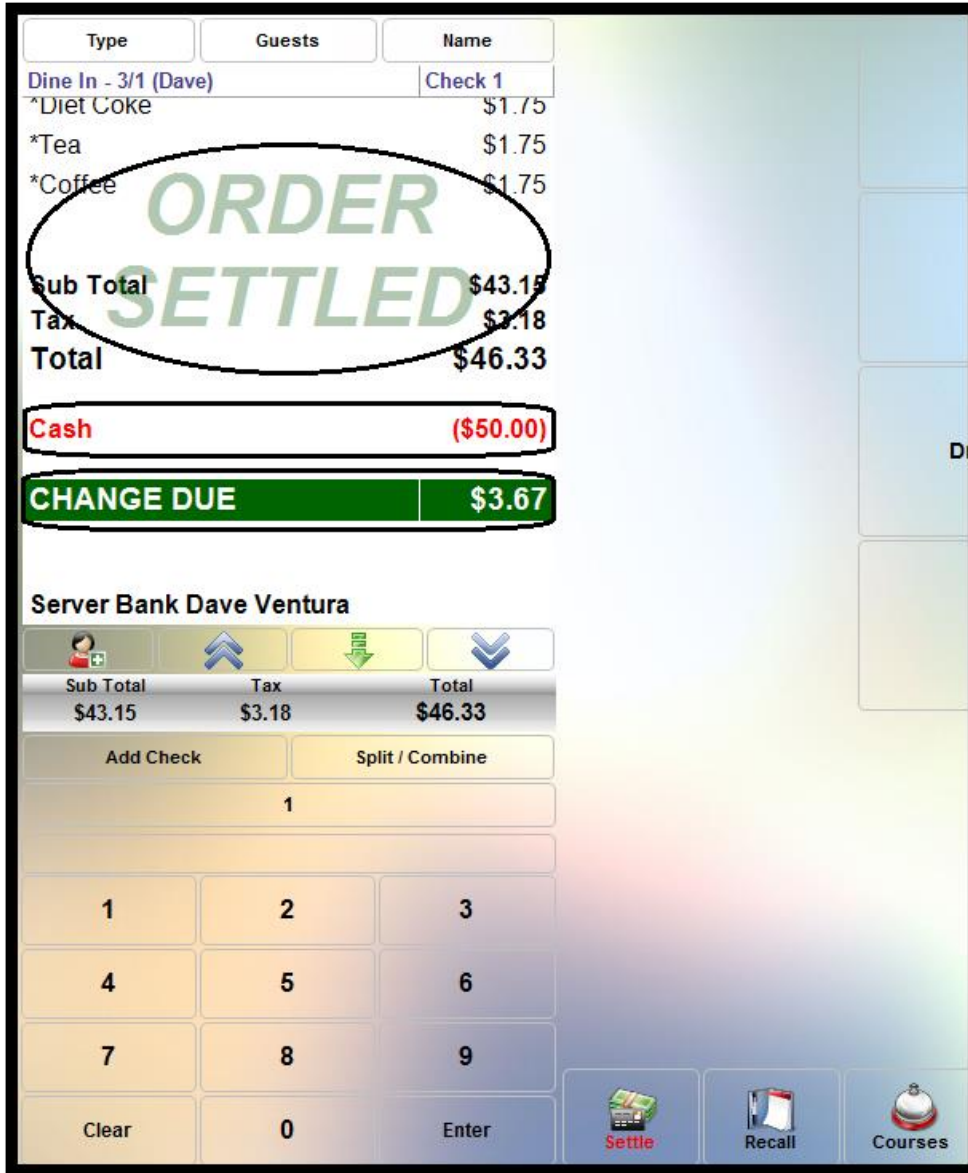


Figure 35-3

Settling with a Credit Card

Settling an order with a credit card in XERA® POS requires the use of Aldelo® EDC. To settle the order, simply swipe the credit card through the MSR (Magnetic Stripe Reader) device

attached to your cashier terminal. Aldelo® EDC automatically settles the order for the exact amount and sends the transaction to your merchant account provider for processing.

To use a credit card for partial settlement of an order, select the credit card type from the Settle screen and enter the monetary amount to charge to the customer's credit card account by using the virtual keypad that displays under the guest check before swiping the credit card through the MSR device.

Upon swiping the card, Aldelo® EDC applies the amount the user entered to the guest check and sends the transaction to your merchant account provider for processing. The user must then select another payment method to settle the remaining balance.

Settling with a Gift Card

Settling an order with a gift card issued by your merchant account provider in XERA® POS requires the use of Aldelo® EDC. To settle the order, simply swipe the gift card through the MSR (Magnetic Stripe Reader) device attached to your cashier terminal. Aldelo® EDC automatically sends the transaction to your merchant account provider for processing.

If the gift card's remaining balance is sufficient to settle the order, then the order is settled for the exact amount and the remaining balance available on the gift card is updated. If the gift card's remaining balance is not sufficient to settle the order, then the transaction is declined and the user must then ask the customer for an alternate method of payment.

To use a gift card for partial settlement of an order, select the gift card type from the Settle screen and enter the monetary amount to charge to the customer's gift card account by using the virtual keypad that displays under the virtual guest check before swiping the gift card through the MSR device. Upon swiping the card, Aldelo® EDC applies the amount the user entered to the guest check and sends the transaction to your merchant account provider for processing. The user must then select another payment method with which to settle the remaining balance.

For further information on tender types, please see the XERA® POS Manager Manual.

Chapter 36 — Courses

The Courses feature of XERA® POS allows the user to group the customers' meals into several courses. This may be accomplished by first selecting the desired menu item and then assigning it to the appropriate course or by assigning automatic courses to your menu items in the XERA® POS Manager application under **Item Tab > Manage > Items > Product Tab**.

When an automatic course is assigned to a menu item, then whenever that menu item is ordered, it is automatically assigned to the predetermined course that was selected in the XERA® POS Manager application.

Automatic Courses

If your restaurant always arranges the menu items on a customer order into courses, then automatic coursing should be used to help speed up the order process.

ASSIGNING AN AUTOMATIC COURSE TO A MENU ITEM

To assign an automatic course to a menu item, open the menu item in the XERA® POS Manager application by navigating to **Item Tab > Manage > Items > Product Tab** and then click the *down arrow* button to the right of the Automatic Course field. Select the course from the dropdown list to which you wish to assign the menu item. Be sure to click the *Save* button when finished to save your changes.

Courses are user defined and may be created in the XERA® POS Manager application by navigating to **Seating Tab > Manage > Courses** and then clicking the *New* button to display the Add Course screen. Be sure to save click the *Save* button after creating a new course.

ORDERING AN AUTOMATIC COURSE MENU ITEM

Placing an order for a menu item that has been assigned an automatic course is identical to ordering any other menu item; however, whenever the menu item is ordered, it displays under the selected course on the smart check automatically (See Figure 36-1).

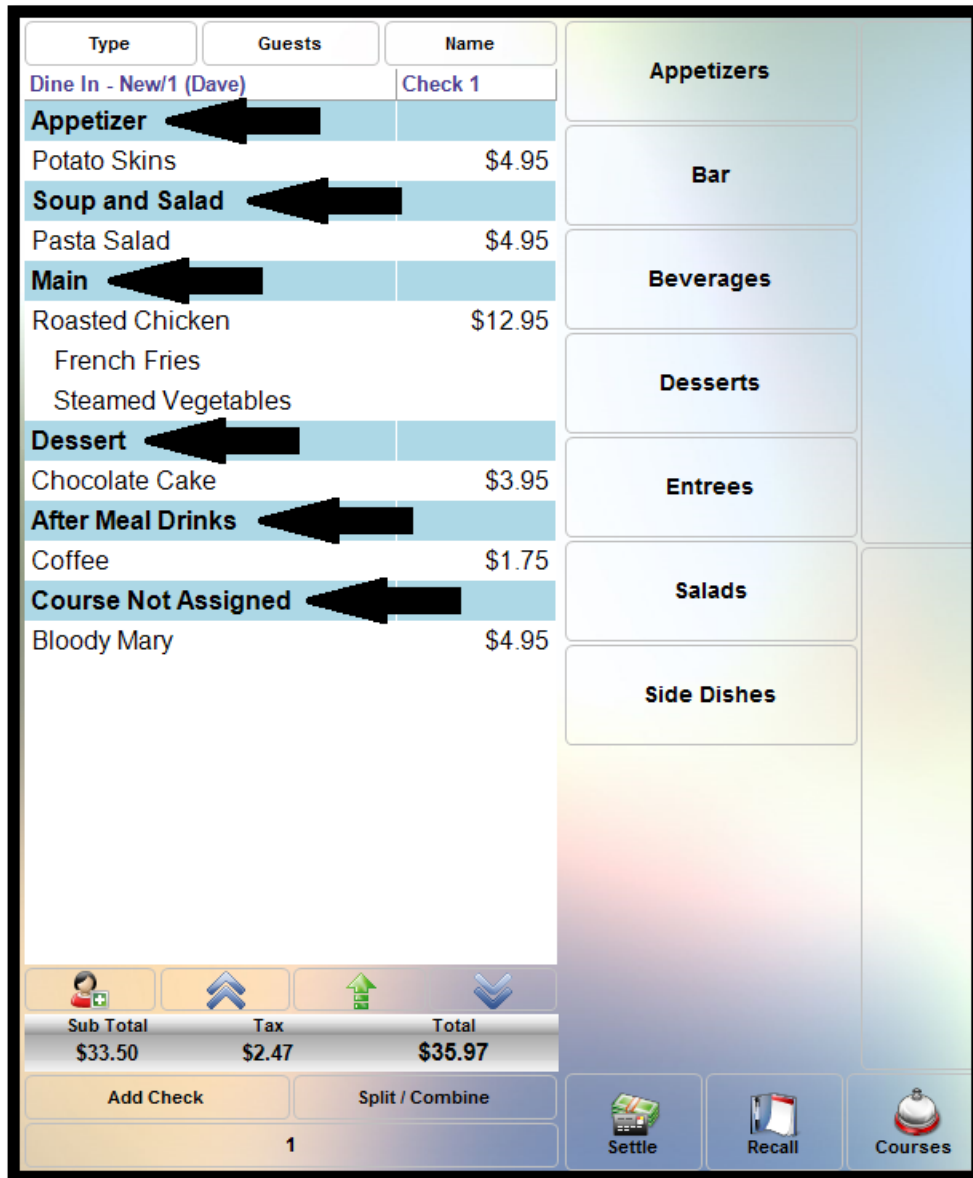


Figure 36-1

Please note that when automatic coursing is used, any items that have not been assigned to an automatic course display under a section of the virtual guest check labeled “Course Not Assigned.”

Manual Courses

Courses may also be assigned to menu items manually on an as-needed basis. This method is typically used when courses are assigned to menu items infrequently.

ASSIGNING A COURSE TO A MENU ITEM MANUALLY

Follow the steps below to assign a course to a menu item manually.

Courses

Whenever you are in order entry mode, click the *Courses* button at the bottom of the screen if you wish to assign courses to your menu items manually. This displays the courses that were created in the XERA® POS Manager application. One button is assigned to each course and these buttons are displayed on the screen.

Select the desired course by clicking on its respective button. The selected course number may be viewed in the upper-left corner of the Courses button along the bottom of the screen (See Figure 36-2).

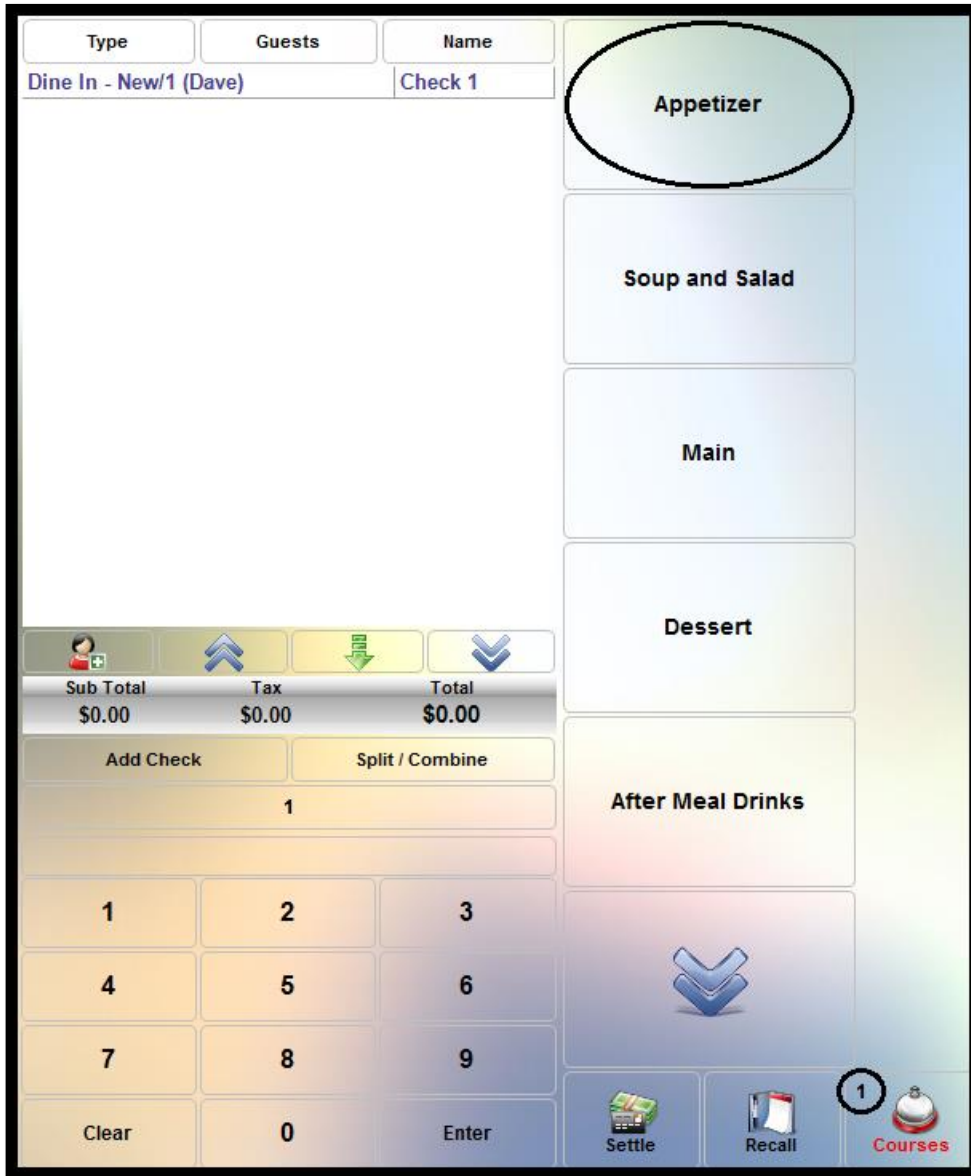


Figure 36-2

Next, select the customer's desired menu items as usual by clicking on the appropriate menu group and then selecting the desired menu item. Each menu item selected in this manner appears on the smart check under the previously selected course name (See Figure 36-3).

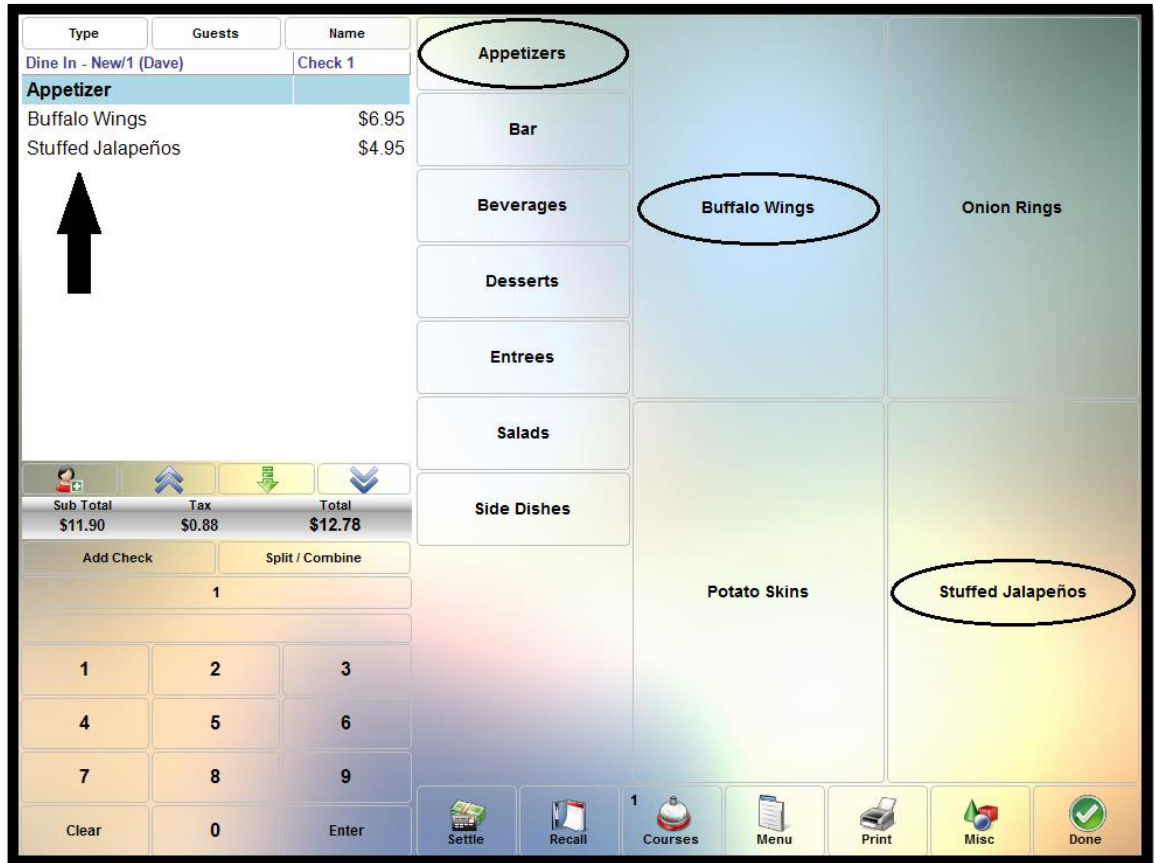



Figure 36-3

Group by Seats

The Group by Seats feature allows the user to create an even greater level of detail within the Courses feature. Courses and seats may both be assigned to the guest party's selected menu items at the same time, where individual courses are assigned to each guest. The seat assignments may be toggled on and off by selecting the *Group by Seats* button repeatedly, so that the menu items' courses may be viewed with or without the seat assignments.

To assign both courses and seats to a guest order, create a new order and click the *Add Guest* button  to create the first guest. Next, select the first course that you wish to order. Enter the menu items that should appear under the first course. When finished with the first course, select the next course that you wish to order. Enter the menu items that should appear under this course. Continue in this manner until all of the first guest's menu items have been entered. Repeat these steps for each additional guest.

To remove the guest assignments from the smart check, click the *Group by Seats* button. (This button may be found by clicking the *Courses* button at the bottom of the screen. If the *Group by Seats* button is not visible, click the down arrow button to reveal additional available buttons.)

The guests are hidden and the menu items are grouped by courses only. To unhide the seat assignments, click the *Group by Seats* button again. This reinstates the display of the menu items by both courses and guests.

Clear

Click the *Clear* button to deselect the previously selected course. Whenever a course is currently selected, its course number appears in the upper left corner of the *Courses* button. Clicking the *Clear* button causes this course number to disappear, indicating that no course is currently selected (See Figure 36-4).



Figure 36-4

Alternatively, a course may be deselected by clicking the *Courses* button and then selecting a different course. This action deselects the original course and replaces it with the newly selected course.

Chapter 37 — Menu

Click the *Menu* button at the bottom of the main screen in XERA® POS if you wish to display the list of menus available to the user. Click the desired menu button to display the available menu groups (See Figure 37-1).

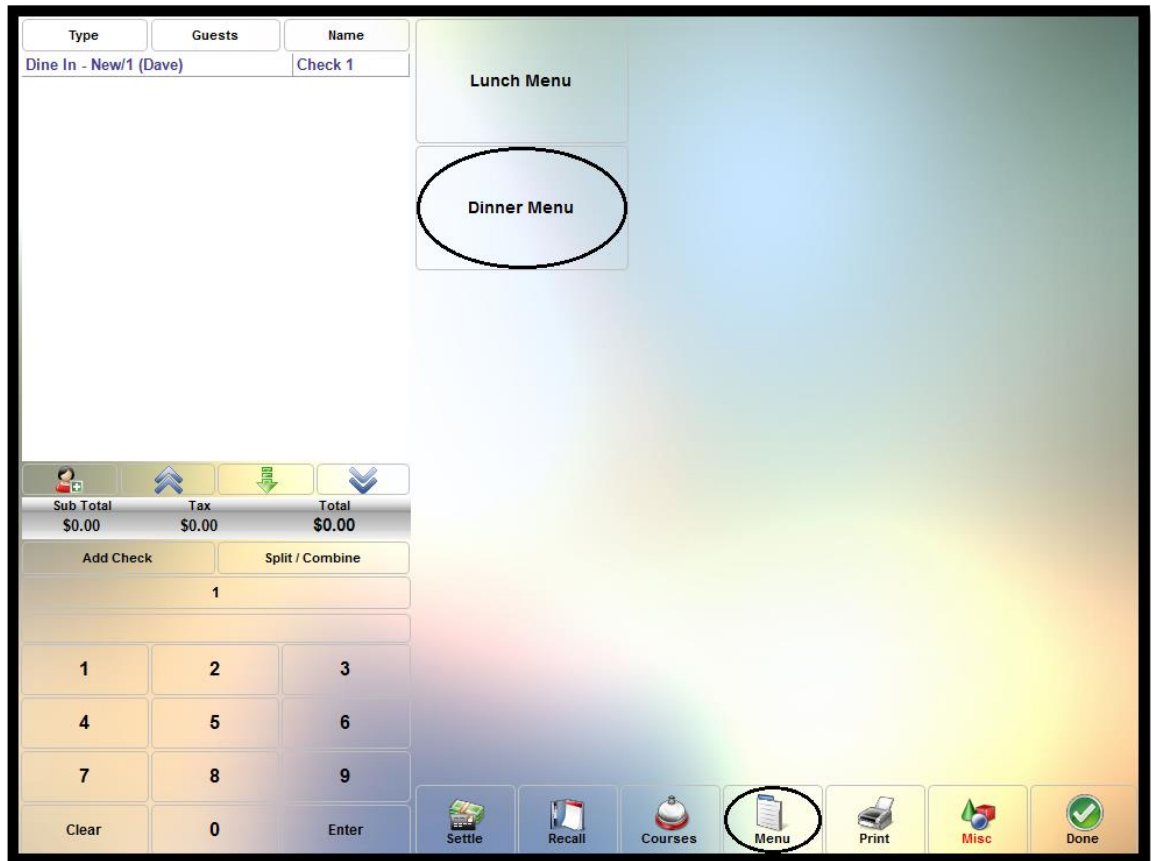


Figure 37-1

Click your desired menu group and then place your menu item orders as usual.

Please note that this feature requires an open order. A new order must be created or an existing order must be recalled before clicking the *Menu* button or an error message displays.

Chapter 38 — Print

Anytime XERA® POS is in the Settle screen, the Recall screen, the Courses screen, or the Misc screen, the *Print* button is available to the user.

Click the *Print* button to print the contents of the smart check that is displayed on the left side of the screen (See Figure 38-1).



Figure 38-1

A copy of the customer receipt prints to the receipt printer attached to the terminal. This copy not only displays the items ordered by the guests but it also includes the receipt header, the receipt footer, the item prices, the order subtotal, the tax, and the total (including the tax) for the order (See Figure 38-2).

```

CHECKERS RESTAURANT
America's Favorite
Bar and Grill.

Order #: 89          10-11  04:22 PM

Server: Eleanor      Terminal: 1
-----
Dine In
1 Guest              Check #1
-----
1 Buffalo Wings          6.95
1 Stuffed Jalapeños     4.95
1 Coca~Cola             1.75
1 Budweiser             3.95
1 New York Steak       16.95
  Medium Well
  Baked Potato
  Sour Cream
  Chives
  Steamed Vegetables
1 Roasted Chicken      12.95
  French Fries
  Rice Pilaf
1 Vanilla Ice Cream    2.50
1 Cheese Cake          3.95

Gratuity              9.00
-----
Sub Total:           $62.95
Tax:                 $3.98
Total:               $66.93

THANK YOU
for Dining with Us.
Please Come Again.

** Printed 10-11  04:29 PM **
    
```

Figure 38-2

Chapter 39 — Miscellaneous Features

The miscellaneous features of XERA® POS are found by logging in and then clicking the *Misc* button at the bottom of the screen to display the main miscellaneous feature groups (See Figure 39-1).

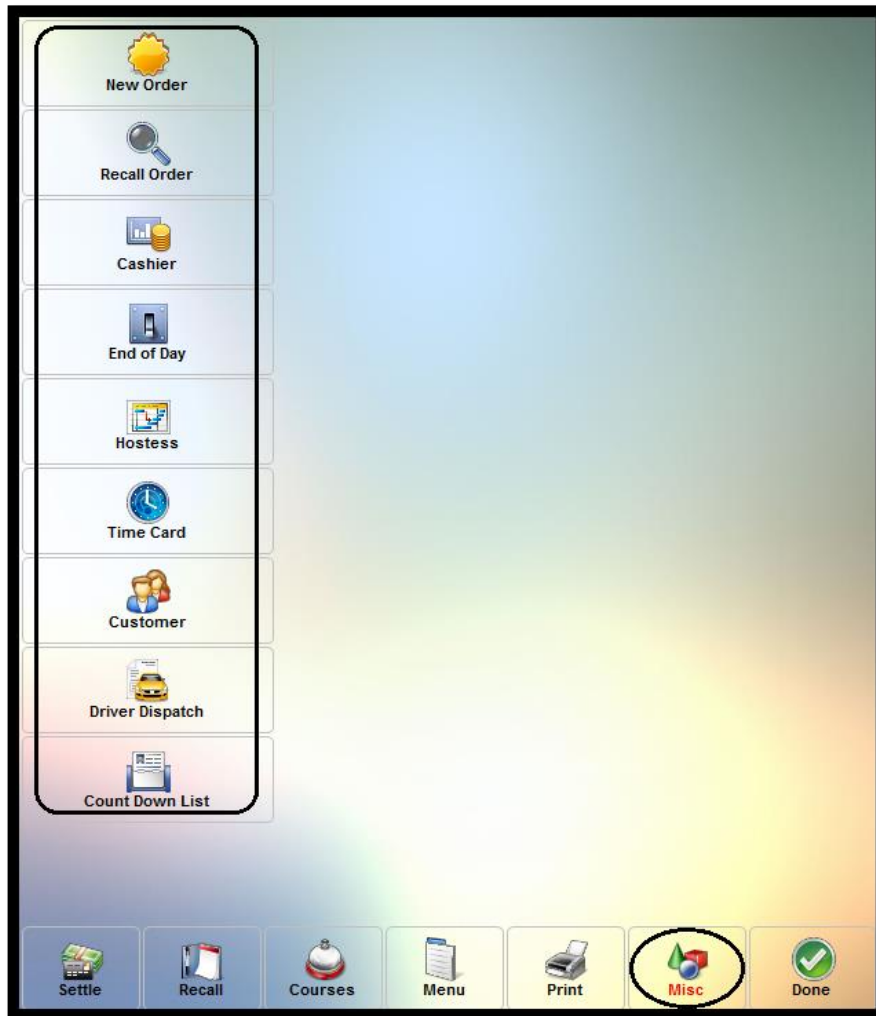


Figure 39-1

New Order

Select the *New Order* button if you wish to create a new order rather than modify an existing one. To continue creating a new order, follow the steps listed under the New Order section on page 316 of this manual.

Recall Order

Select the *Recall Order* button if you wish to recall an existing order rather than create a new one. To continue recalling an existing order, follow the steps in the chapter titled Recall on page 315 of this manual.

Cashier

Select the Cashier button to access the Cashier features of XERA® POS.

CASH DRAWER 'x'

The *Cash Drawer 'x'* button gives the user access to the Cashier Sign In feature. One *Cash Drawer 'x'* button appears in the display for each cash drawer that is setup in the XERA® POS Manager application. Up to five cash drawers may be setup per terminal, where 'x' is the number of the cash drawer for the selected terminal. Terminals are created in the XERA® POS Manager application under **Company Tab > Settings > Terminal Settings**.

Sign In

Select the *Sign In* button to continue to the Cash Count screen. To perform the cash count, follow the steps in the Cash Tray Beginning Count section on page 313 of this manual.

No Sale

A no sale is performed whenever the cashier needs to open the cash drawer between customer transactions. It is typically performed when a customer asks the cashier for change whenever the cash drawer is not open. Click the *No Sale* button to open the cash drawer between transactions.

Pay In

A Pay In is performed when additional money is added to the employee's cash drawer after the initial count. This may be required because the drawer is out of one or more denominations of coin or currency. For example, if the cashier begins his shift and runs out of quarters after settling several guest checks, then the manager might bring him an additional \$10.00 worth of quarters and perform a Pay In transaction. Clicking the *Pay In* button opens the cash drawer and displays the Pay In screen.

Pay In

On the Pay In screen, click the *Pay In* button, choose the currency type you are adding to the cash drawer, and then enter the amount by using the virtual keypad at the bottom-right of the screen. Be sure to click the *Pay* button on this screen when finished (See Figure 39-2).

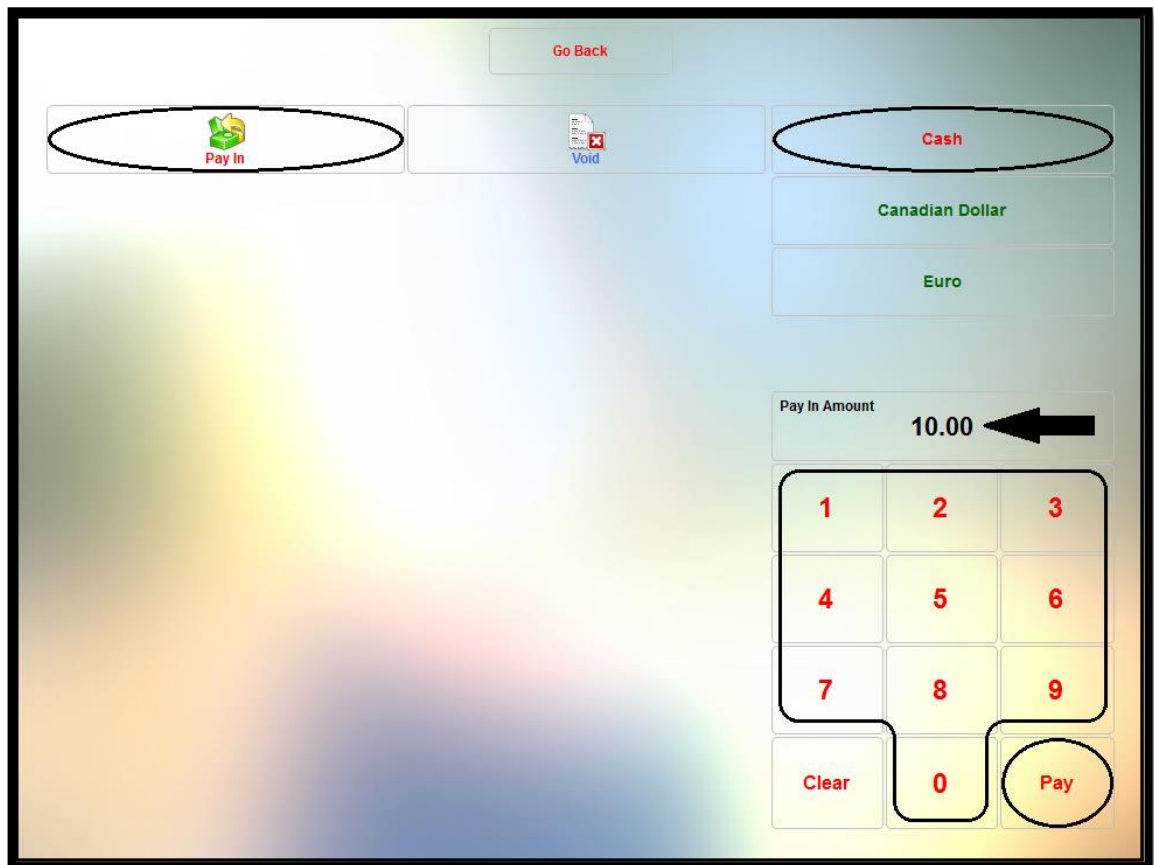


Figure 39-2

Void

To void a previous Pay In transaction, click the *Void* button to display a list of the previous transactions. Each transaction appears as a button in the grid. Select the appropriate transaction from the grid by clicking on it (See Figure 39-3).

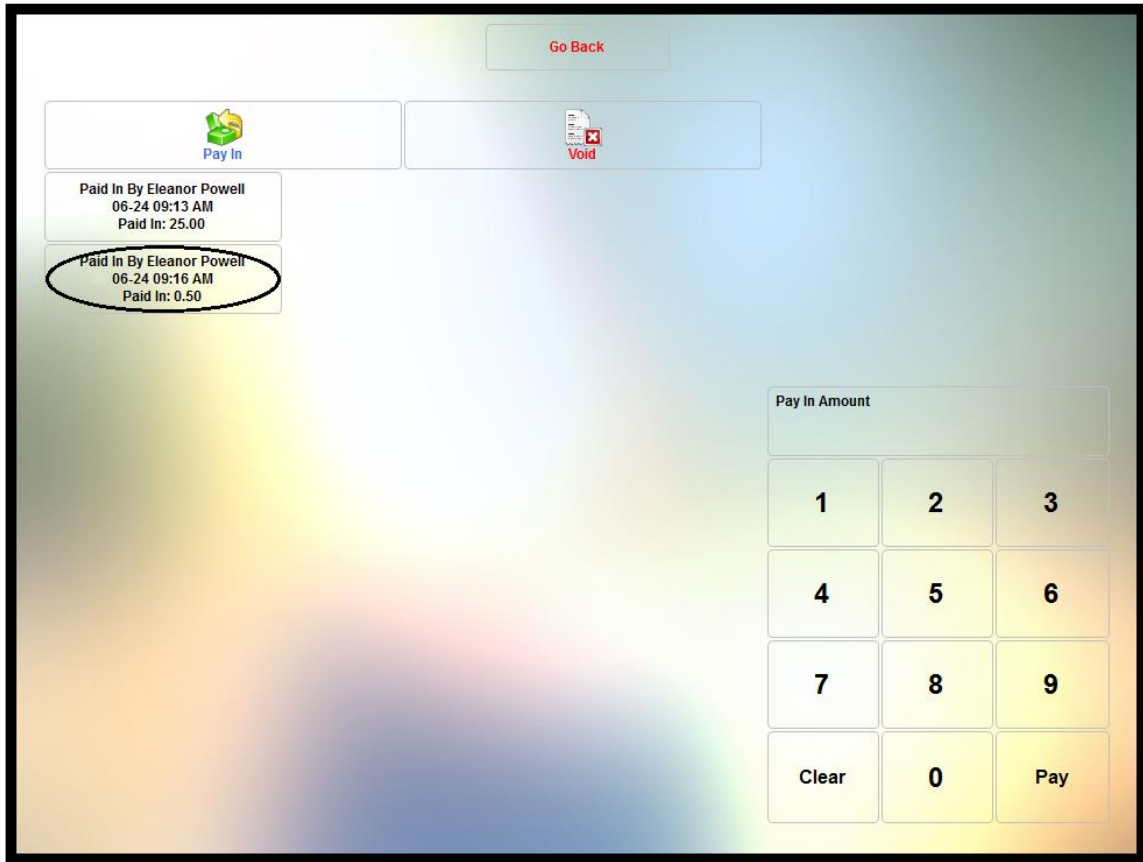


Figure 39-3

On the confirmation window that appears, click the *Yes ... Perform Void Now* button to complete the void of the Pay In transaction (See Figure 39-4).

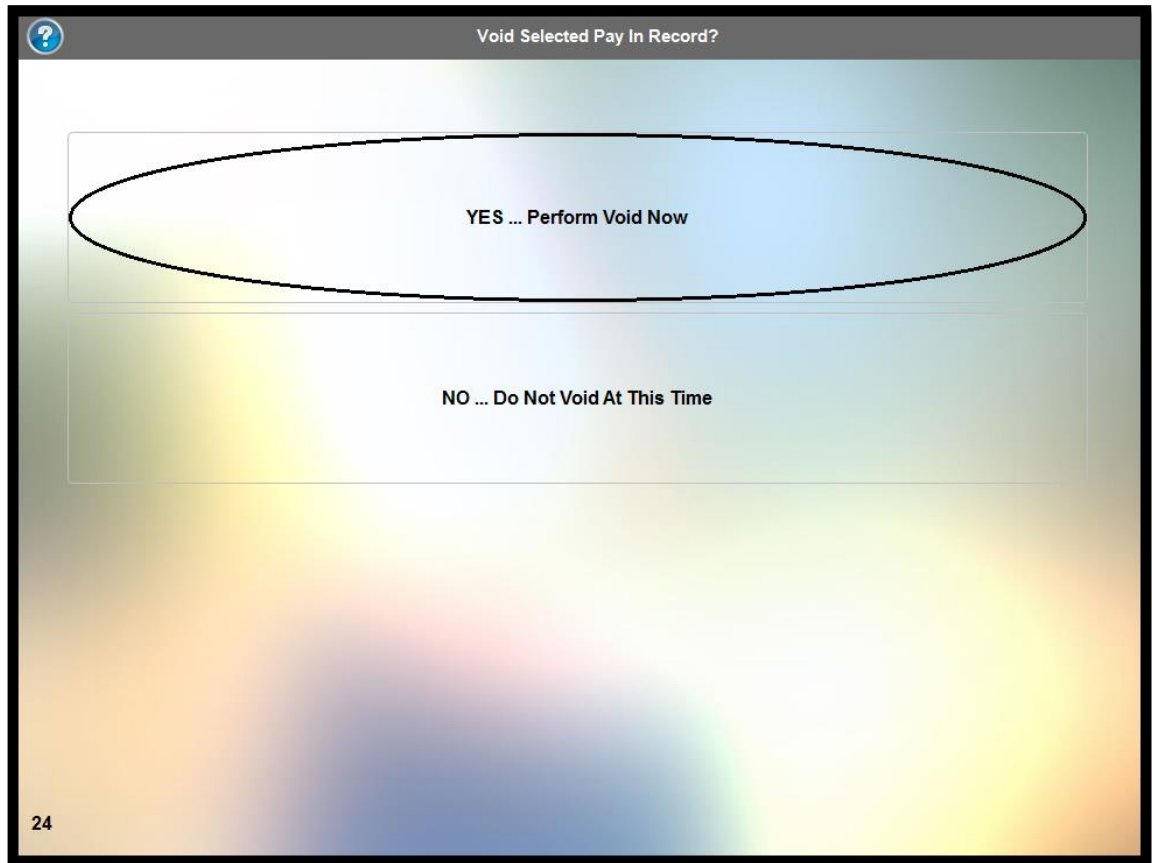


Figure 39-4

Pay Out

A Pay Out transaction is performed whenever cash is removed from an employee's cash drawer. Pay Outs may be performed for several reasons: to pay an employee for the gratuities paid by credit card that he earned during his shift, to pay a payee in cash, to give an employee a cash advance on his wages, or to remove excess cash and deposit it in the company safe.

Tip Out

The Tip Out feature of XERA® POS allows the management to immediately pay employees the gratuities to which they are entitled.

To do so, click the *Tip Out* button to display the total tip pool. This amount displays on the face of the *Tip Out* button and is the total of all gratuities that have been paid by the customers and entered into the system.

Next, select the employee you wish to pay by clicking the appropriate button and then select the currency in which to pay the employee by clicking on its respective button.

Finally, enter the amount to pay the employee by using the virtual numeric keypad at the bottom-right of the screen. As you enter the amount, it displays in the Pay Out Amount field directly above the virtual numeric keypad.

When finished entering the payout amount, click the *Pay* button and pay this amount to the employee from the cash in the cashier's cash tray (See Figure 39-5).

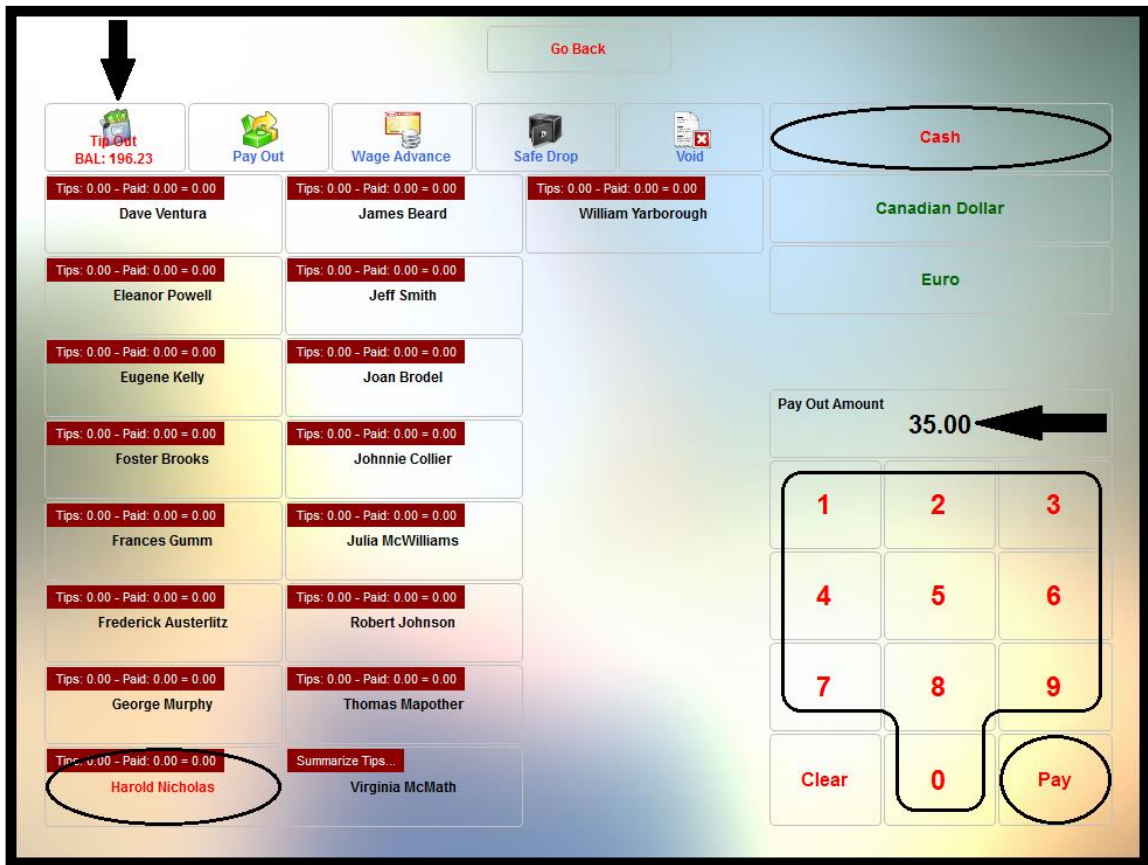


Figure 39-5

Once the *Pay* button is clicked, the new tip pool balance appears on the face of the *Tip Out* button and the amount paid to the employee appears on the face of his respective button in the grid (See Figure 39-6).

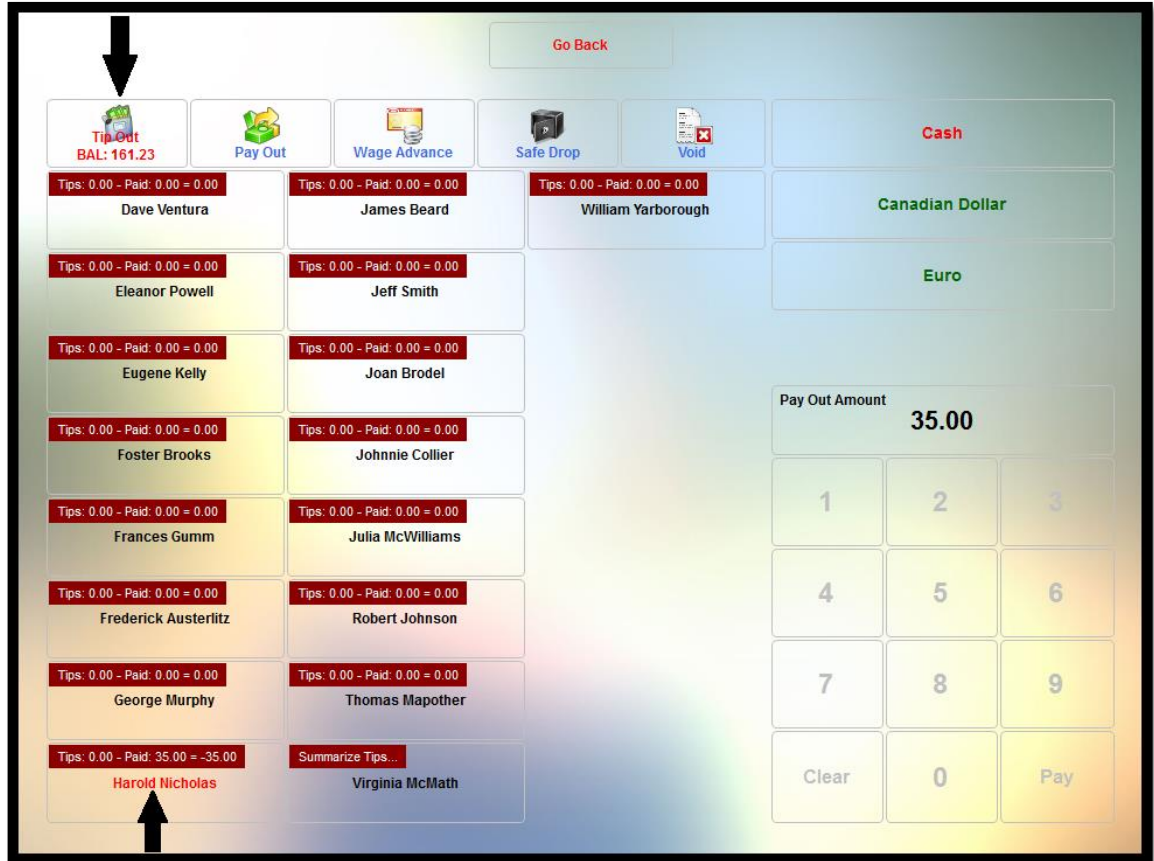


Figure 39-6

When finished, click the *Go Back* button to exit the Tip Out feature and return to the previous screen.

Pay Out (to a Payee)

A Pay Out to a payee is performed when money is owed to the payee and the manager wishes to pay the payee in cash.

For example, a restaurant may deal with a vendor who brings several bouquets of fresh flowers to the restaurant every morning, for which he collects daily in cash.

To perform a pay out to a payee, click the *Pay Out* button on the Pay Out screen and then click anywhere in the Payee field to display the virtual keyboard. Enter the name of the payee and then click the keyboard's *Enter* or *OK* button to commit the name to the Payee field.

Next, click anywhere in the Description field and enter a description of the Pay Out transaction. For the example above, this may include the company name, the invoice number, and the invoice date of the transaction. Click the keyboard's *Enter* or *OK* button to commit the entered information to the Description field.

Finally, enter the monetary amount of the payout by using the virtual numeric keypad displayed in the lower right portion of the Pay Out screen.

Be sure to click the *Pay* button when finished (See Figure 39-7).

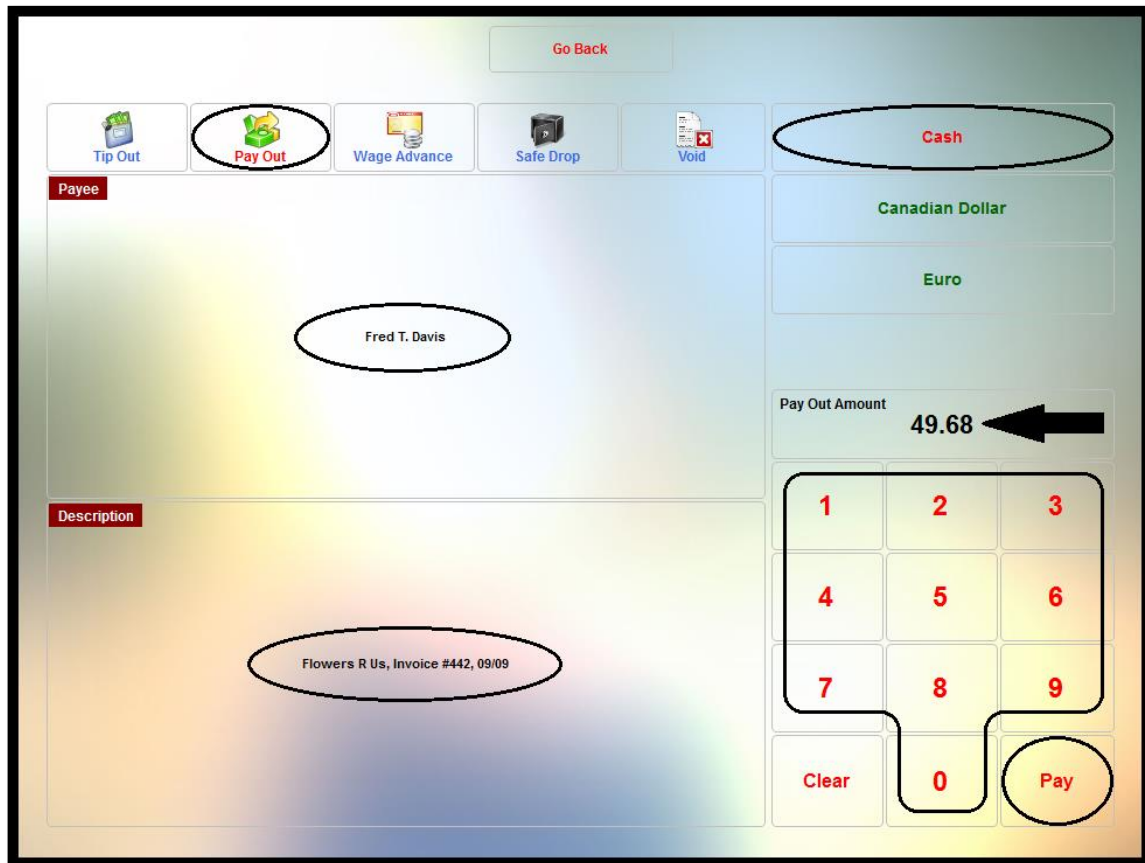


Figure 39-7

When finished, pay the payee from the cash in the cashier's cash tray.

Wage Advance

A Wage Advance is performed when the manager agrees to allow an employee to take a cash advance against his future wages. This advance is recorded in the database and available to the manager when the next payroll is performed so that the advance may be deducted from the employee's next paycheck.

To perform a *Wage Advance*, click the *Wage Advance* button on the Pay Out screen. Select the employee to whom the wage advance is being paid by clicking on the button displaying his name on the left side of the screen.

Finally, enter the monetary amount of the wage advance by using the virtual numeric keypad displayed in the lower-right portion of the Wage Advance screen.

Be sure to click the *Pay* button when finished (See Figure 39-8).

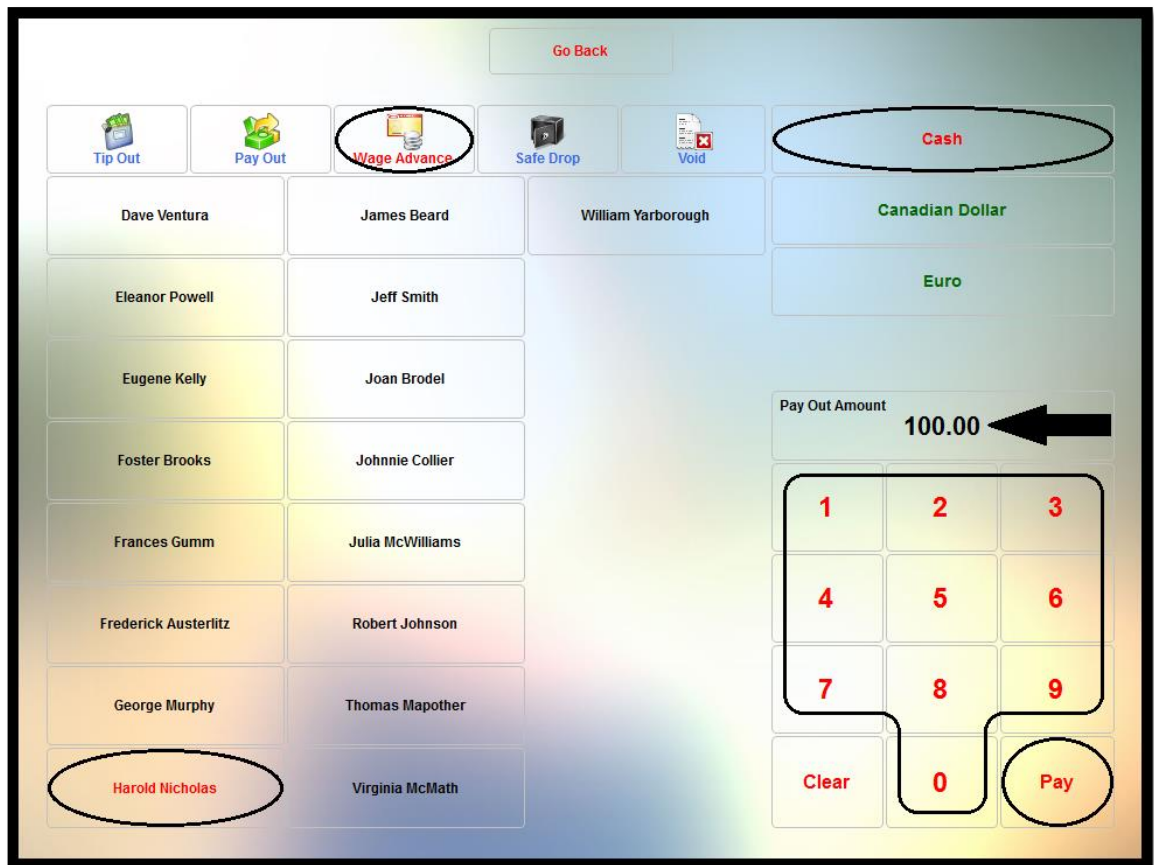


Figure 39-8

Don't forget to pay the wage advance to the employee from the cash in the cashier's cash tray.

Safe Drop

A *Safe Drop* is performed when excess cash that has accumulated in the cash drawer is removed by the manager and deposited in the store safe. The amount removed is recorded in the database and remains a part of the cash that must be accounted for at the end of the cashier's shift.

To perform a safe drop, click the *Safe Drop* button on the Pay Out screen. Select the type of currency that is being removed from the cash tray by clicking on the appropriate button on the right side of the screen.

Next, remove the excess cash from the employee's cash tray. Finally, enter the monetary amount of the safe drop by using the virtual keypad displayed in the lower-right portion of the Safe Drop screen.

Be sure to click the *Pay* button when finished and deposit the cash in the store safe as per company policy (See Figure 39-9).

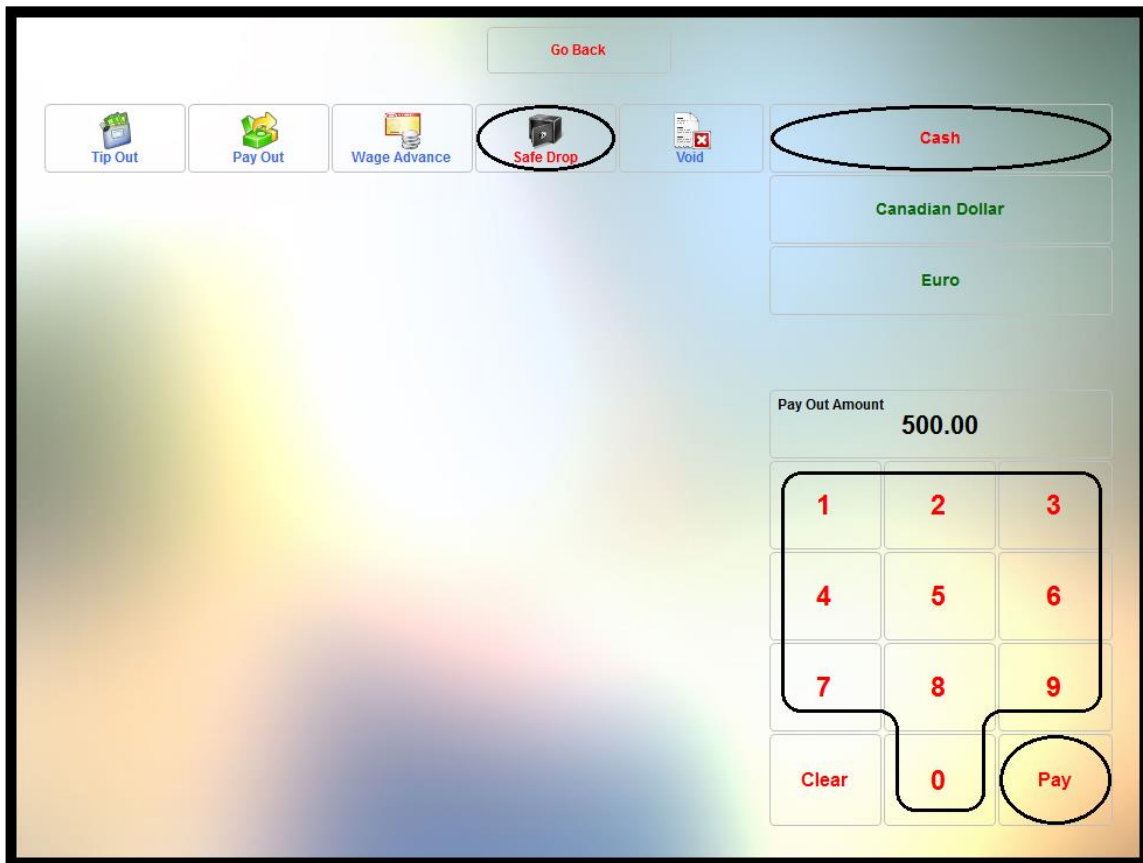


Figure 39-9

Void

The *Void* button is used to reverse a previous payout transaction.

To void a payout transaction, click the *Void* button and then select the payout transaction you wish to void by clicking on its button in the grid.

All four types of payout transactions may be voided in this manner (See Figure 39-10).

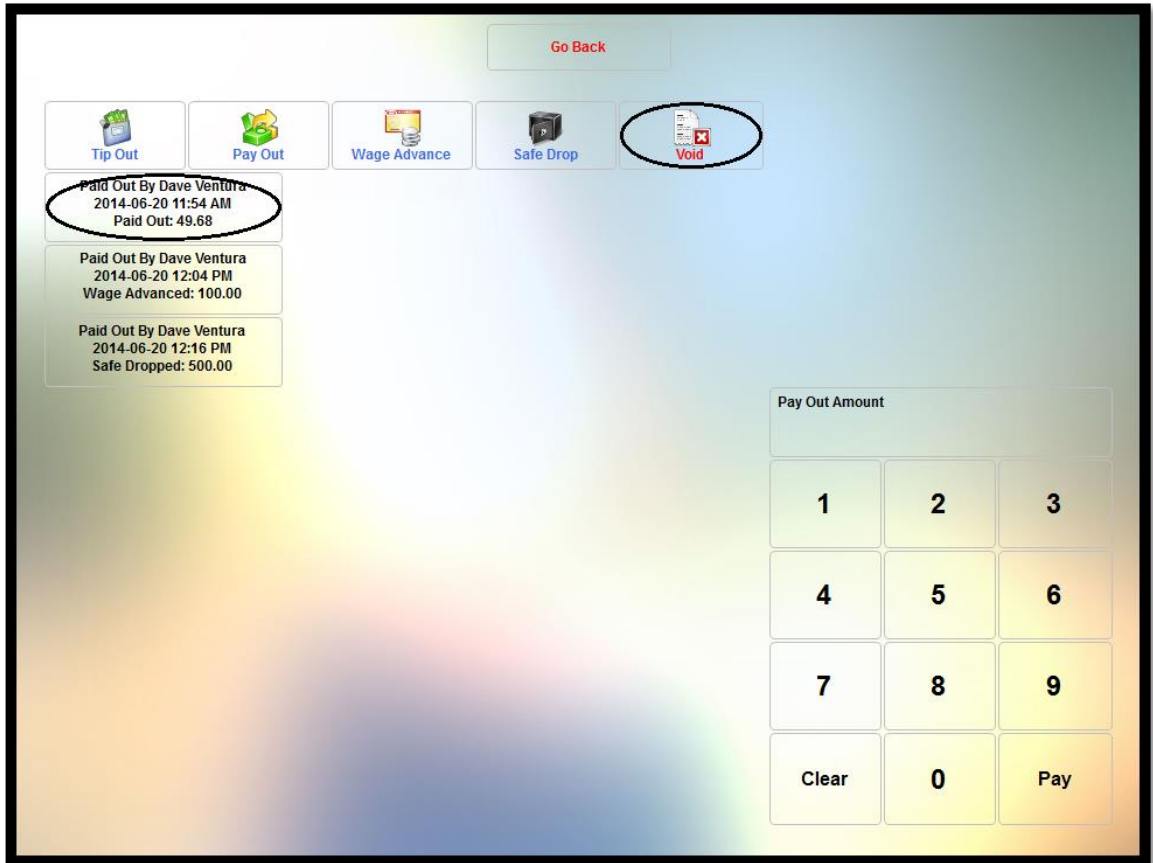


Figure 39-10

On the confirmation window that appears, click the *Yes ... Perform Void Now* button to complete the void of the payout transaction (See Figure 39-11).

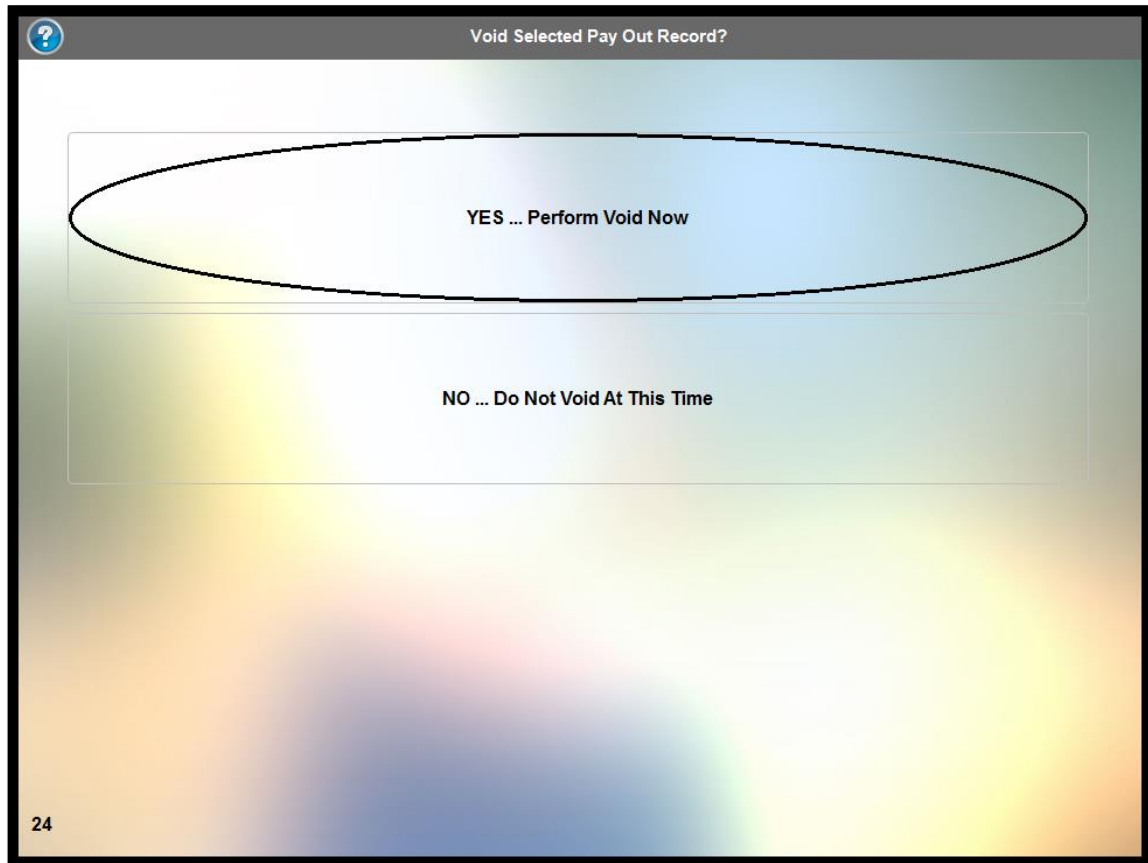


Figure 39-11

Edit Gratuity

The *Edit Gratuity* button is used to adjust a gratuity on a previously settled guest check.

Click the button to display the Edit Gratuity screen. This screen displays each order that was settled using Aldelo® EDC. It also shows the total payments, the total gratuities, the cumulative gratuity percentage, and the summary total.

Select the order to which you wish to adjust the gratuity by clicking on its respective button (a guest check button displayed with blue text blue indicates that no gratuity exists for the guest check [See Figure 39-12]).

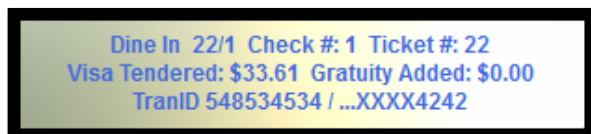


Figure 39-12

Clicking a guest check button enables the virtual keypad. Enter the new gratuity amount via this keypad. As the new gratuity amount is entered, it displays on the screen in the New Gratuity field, directly above the virtual keypad.

Click the keypad's *Enter* button when finished (See Figure 39-13).

The screenshot displays a POS interface with the following elements:

- Navigation:** "Go Back" and "Search" buttons at the top.
- Check List:**
 - Dine In 18/1 Check #: 1 Ticket #: 18
 Visa Tendered: \$51.82 Gratuity Added: \$5.00
 TranID 401076887 / ...XXXX4242
 - Dine In 20/1 Check #: 1 Ticket #: 20
 Visa Tendered: \$48.50 Gratuity Added: \$7.00
 TranID 331187165 / ...XXXX4242
 - Dine In 21/1 Check #: 1 Ticket #: 21
 Master Card Tendered: \$51.12 Gratuity Added: \$10.00
 - Dine In 22/1 Check #: 1 Ticket #: 22**
Visa Tendered: \$33.61 Gratuity Added: \$0.00
TranID 548534534 / ...XXXX4242 (This entry is circled in red)
- Summary:**
 - Payments Total: \$163.05
 - Gratuities Total: \$22.00
 - Gratuities Percent: 13.49%
 - Summary Total: \$185.05
 - New Gratuity: 5.00 (An arrow points to this field)
- Virtual Keypad:**
 - Buttons for digits 1-9, 0, Clear, and Pay.
 - The keypad is outlined in black.

Figure 39-13

Upon clicking the *Pay* button, the order's guest check button and the fields on the right side of the screen are updated to reflect the adjustment (See Figure 39-14).

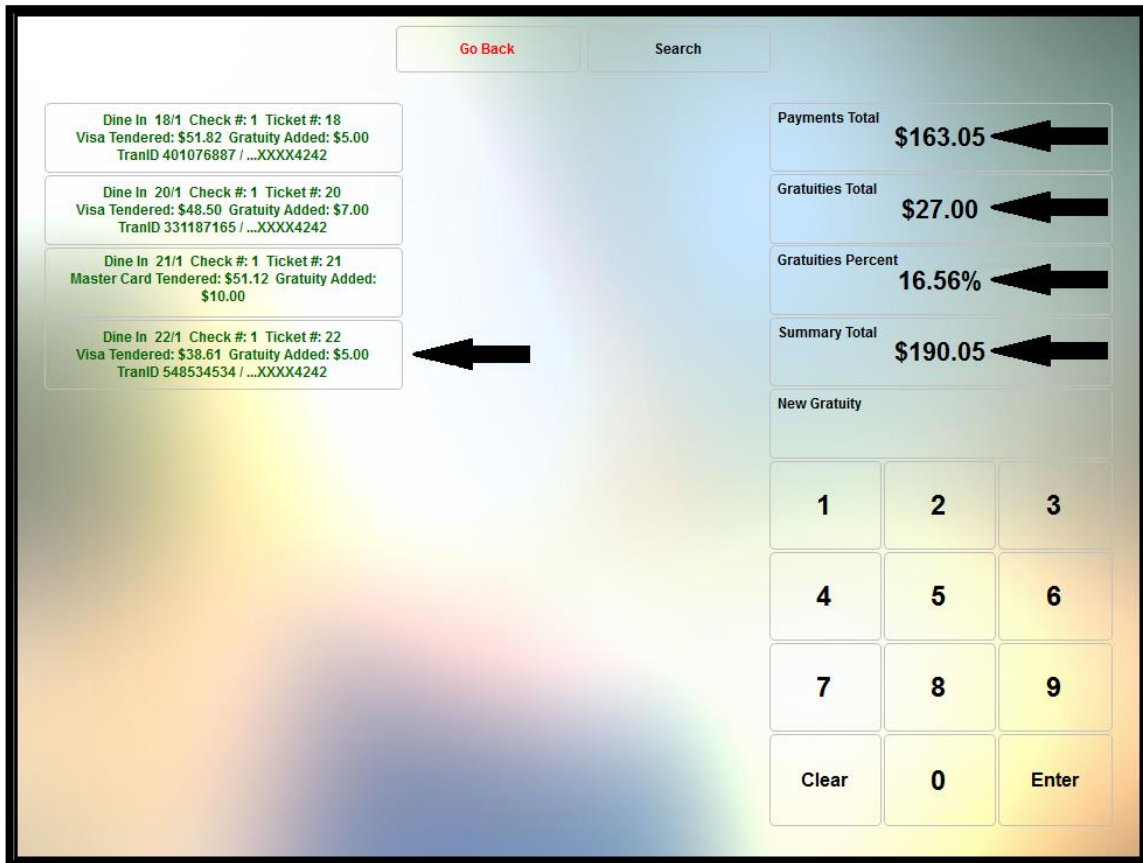


Figure 39-14

When finished editing the gratuity, click the *Go Back* button to return to the previous screen.

Search

To find an order by order number, click the *Search* button to enable the virtual keypad in the lower-right portion of the screen. Enter the order number and then click the *Enter* button on the keypad. If the order is found, a button displays that shows the existing order information. A summary of the order also appears in the fields on the right side of the screen.

Click the order button and edit the gratuity as described above (See Figure 39-15).

The screenshot shows a POS interface with the following elements:

- Buttons:** "Go Back" (top left), "Search" (top right), "Clear" (bottom left of keypad), "Pay" (bottom right of keypad).
- Text Box (Left):** Dine In 22/1 Check #: 1 Ticket #: 22
 Visa Tendered: \$38.61 Gratuity Added: \$5.00
 TranID 548534534 / ...XXXX4242
- Summary Table (Right):**

Payments Total	\$33.61
Gratuities Total	\$5.00
Gratuities Percent	14.88%
Summary Total	\$38.61
New Gratuity	5.00
- Keypad (Bottom Right):** A numeric keypad with buttons for digits 1-9, 0, a "Clear" button, and a "Pay" button.

Figure 39-15

When finished editing the gratuity, click the *Go Back* button to return to the previous screen.

Cashier Report

The Cashier Report displays all of the payment activity that has occurred during a cashier's shift. The report also includes the beginning cashier balance and the total expected amount of all tender types on hand at the time the report is run.

If the length of the report exceeds the limits of the window, the scroll buttons at the top and bottom of the window may be used to move the report up or down so that the hidden areas may be viewed.

The report may be printed by clicking the *Print* button on the right side of the window.

When finished viewing the report, click the *OK* button to close the Cashier Report and return to the previous screen (See Figure 39-16).

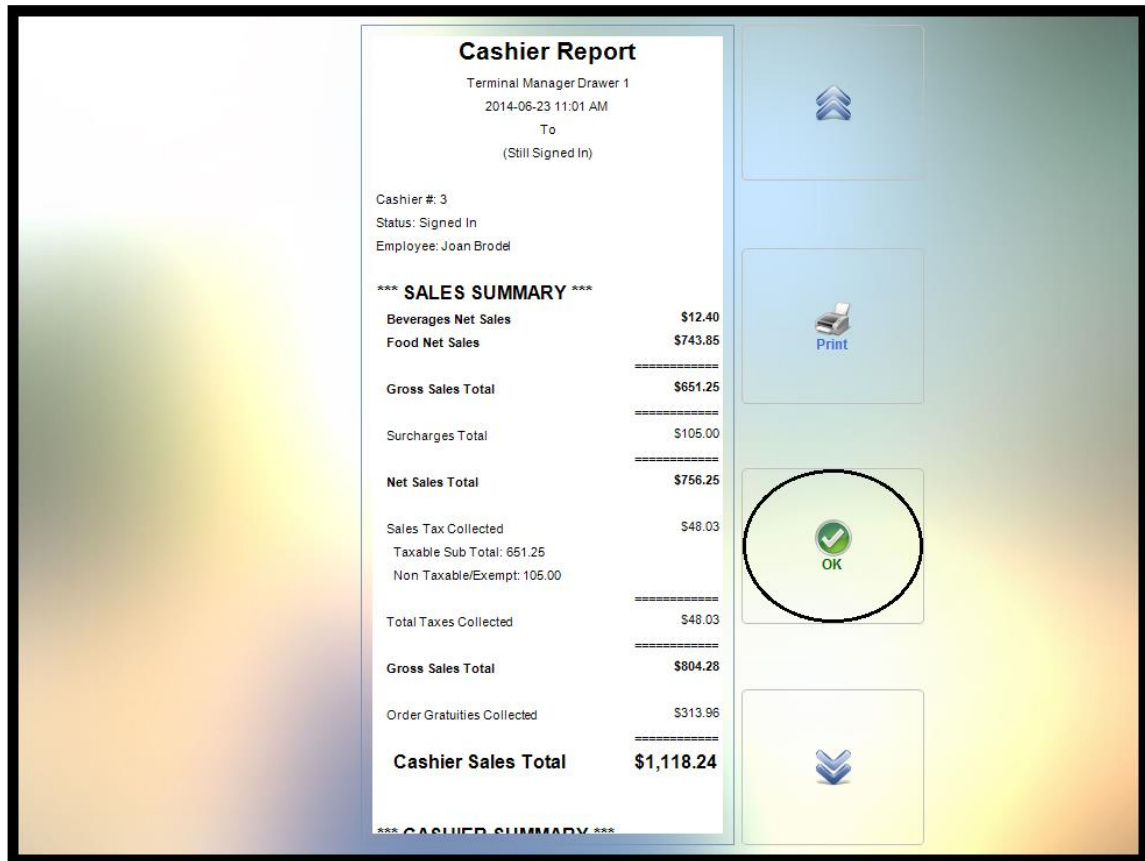


Figure 39-16

Blind Close

A blind close is the closing of an employee's cash drawer without performing the reconciliation process. A blind close allows a staff member to reconcile his cash tray at a later time or to assume that the cash tray count is correct without reconciliation. A blind close may also be performed by one staff member on the cash tray of another staff member, if necessary.

To perform a blind close, click the *Blind Close* button (See Figure 39-17).

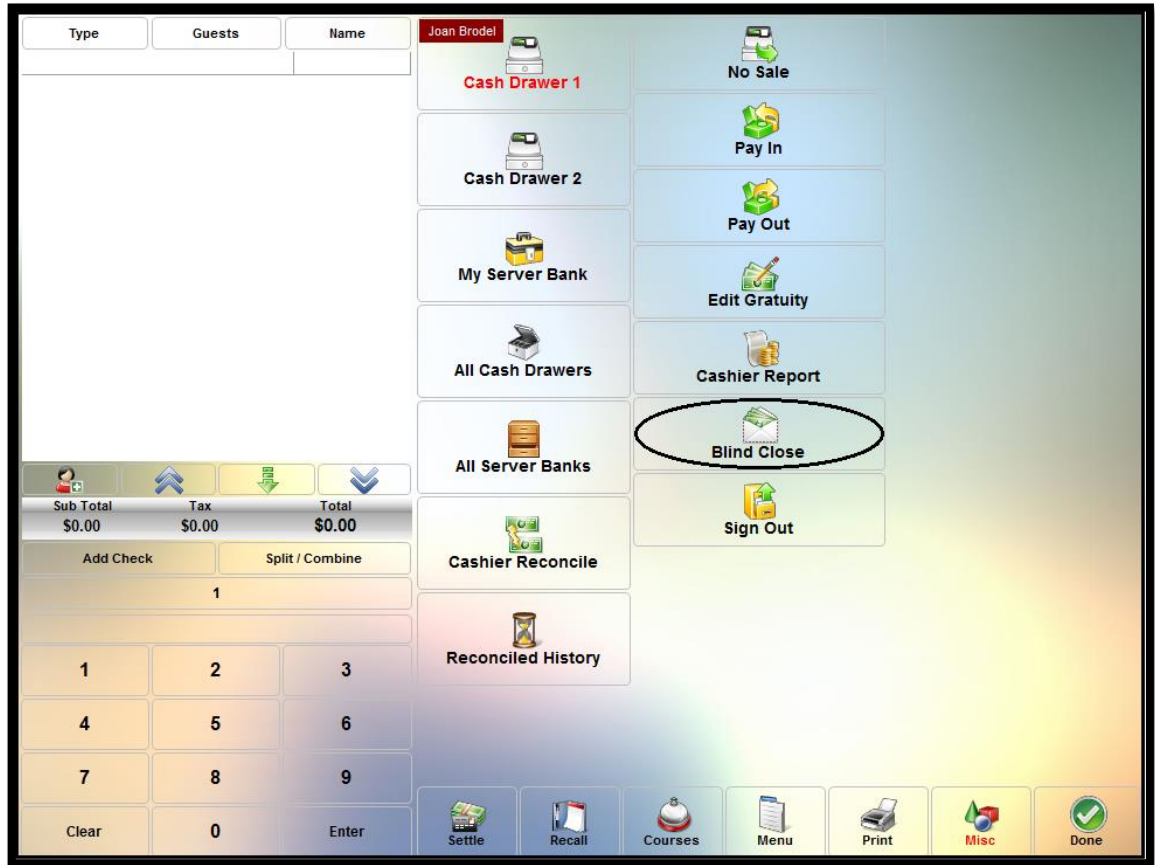


Figure 39-17

Next the user must confirm that he indeed wishes to mark the selected cashier as blind closed. Click the *Yes ... Mark Selected Cashier As Blind Closed* button to complete the blind close (See Figure 39-18).

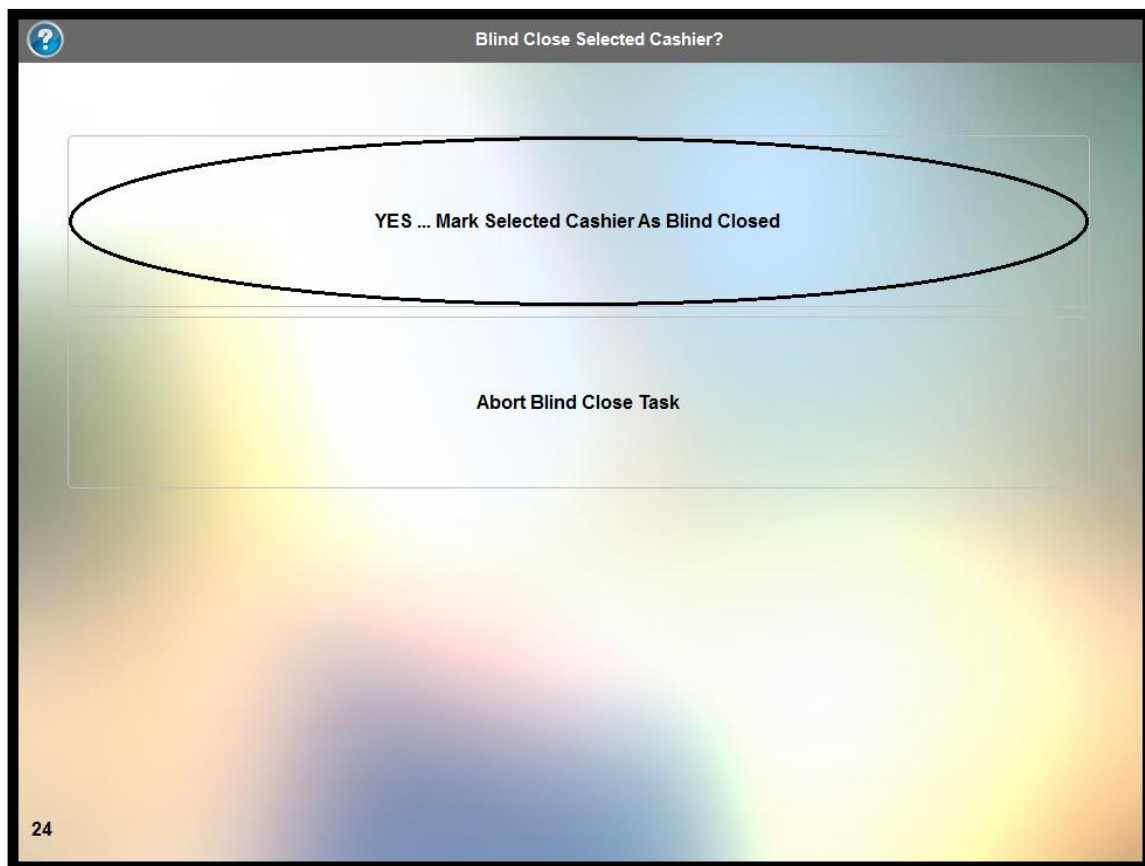


Figure 39-18

To exit this screen without performing the blind close, click the *Abort Blind Close Task* button.

Sign Out

The Sign Out feature allows the user to close and reconcile his cash tray.

Click the *Sign Out* button to display the Cash Count screen (See Figure 39-19).

The screenshot shows a software interface for a cash count. At the top, there are four buttons: 'Go Back' (red), 'Re-Open' (green), 'Cashier Report' (blue), and 'Accept' (green). Below these is a summary table:

Current Action	Total Expected	Total On Hand	Cashier Short
Sign Out	\$1,022.01	\$0.00	(\$1,022.01)

Below the summary is a list of tender types, each with a red '\$0.00' indicator in the top-left corner:

- Cash (Canadian Dollar) - Additional Cash ... - \$0.10 X ...
- Visa (Euro) - \$100.00 X ... - \$0.05 X ...
- Master Card - \$50.00 X ... - \$0.01 X ...
- Debit Card - \$20.00 X ...
- Gift Card - \$10.00 X ...
- EBT Card - \$5.00 X ...
- \$2.00 X ...
- \$1.00 X ...
- \$0.50 X ...
- \$0.25 X ...

In the bottom-left corner, there is a numeric keypad with buttons for digits 1-9, 0, Clear, and Enter.

Figure 39-19

Performing the Final Count

The final count is made by counting the total number of each denomination of currency and coin and entering it into the Sign Out screen.

For example, count the total number of \$20.00 bills that remain in the cash drawer, click the *\$20.00 X...* button, enter the number of twenties counted into the virtual numeric keypad in the lower-left corner of the screen, and then click the *Enter* button. The total value counted for the denomination is calculated by XERA® POS and applied to the Total On Hand figure near the top of the screen.

Repeat this procedure for each of the denominations of currency and coin remaining in the cash drawer until you have entered all of them. The count of each denomination and the total monetary value of each denomination appear in the upper-left corner of the denomination button.

Next, click on each of the other tender types displayed on the Sign Out screen in turn and enter them as well. If the tender type is a foreign currency, the procedure is similar to that described above.

For credit card, debit card, and gift card tender types, simply click the tender type button to display a list of all of the transactions that were recorded for that tender type. These transactions are automatically applied to the count, thus increasing the Total On Hand figure. Click on each of the tender type buttons, even if the quantity to enter is zero.

When you finish counting the contents of the cash tray and have entered everything as described above, the Total Expected figure is automatically deducted from the Total On Hand figure to reveal the final Total Discrepancy figure. A negative number for the total discrepancy indicates a cashier shortage in the Total On Hand amount. A positive number for the total discrepancy indicates a cashier overage in the Total On Hand amount and a negative number for the total discrepancy indicates a cashier shortage in the Total On Hand amount See Figure 39-20).

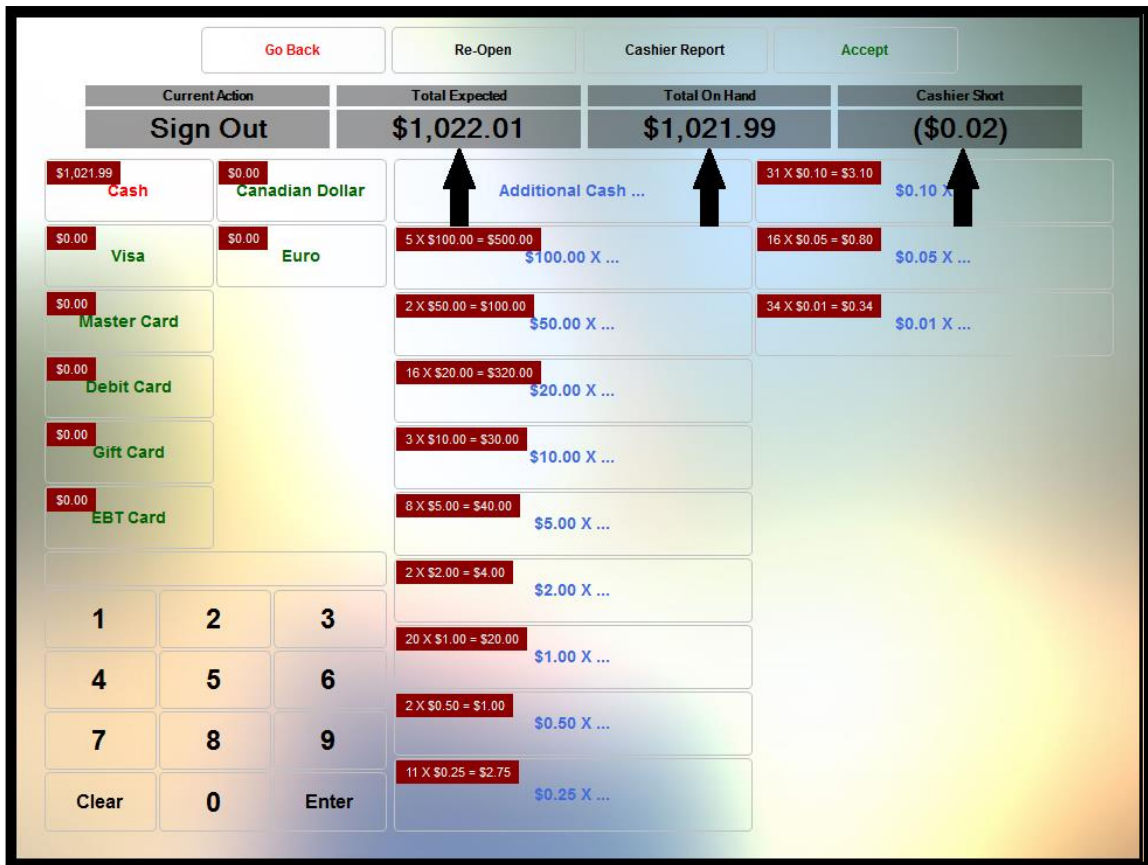


Figure 39-20

Go Back

Click the *Go Back* button if you wish to cancel the sign out procedure and return to the previous screen.

Re-Open

Click the *Re-Open* button if you wish to cancel the sign out procedure and re-open the cash drawer.

Cashier Report

Click the *Cashier Report* button to display the current cashier report on the screen. The Cashier Report is described on page 363 of this manual.

Accept

When you finish entering the count and are satisfied that it is correct, click the *Accept* button to complete the sign out process.

MY SERVER BANK

The *My Server Bank* button gives the user access to the Server Bank Sign In feature of XERA[®] POS.

Sign In

Select the *Sign In* button to continue to the Cash Count screen. To perform the cash count, follow the steps in the Starting Your Server Bank section on page 309 of this manual.

Pay In

A Pay In is performed when additional money is added to the employee's server bank after the initial count. This may be required because the server is out of one or more denominations of coin or currency.

For example, if the server begins his shift and runs out of quarters after settling several guest checks, then the manager might bring him an additional \$10.00 worth of quarters and perform a Pay In transaction.

Click the *Pay In* button to display the Pay In screen.

Pay In

Click the *Pay In* button on the Pay In screen, choose the currency type you are adding to the server bank, and then enter the amount by using the virtual keypad in the bottom-right corner of the screen. Be sure to click the *Pay* button on the keypad when finished.

The monetary amount of the pay in appears in the Pay In Amount field on the right side of the screen (See Figure 39-21).

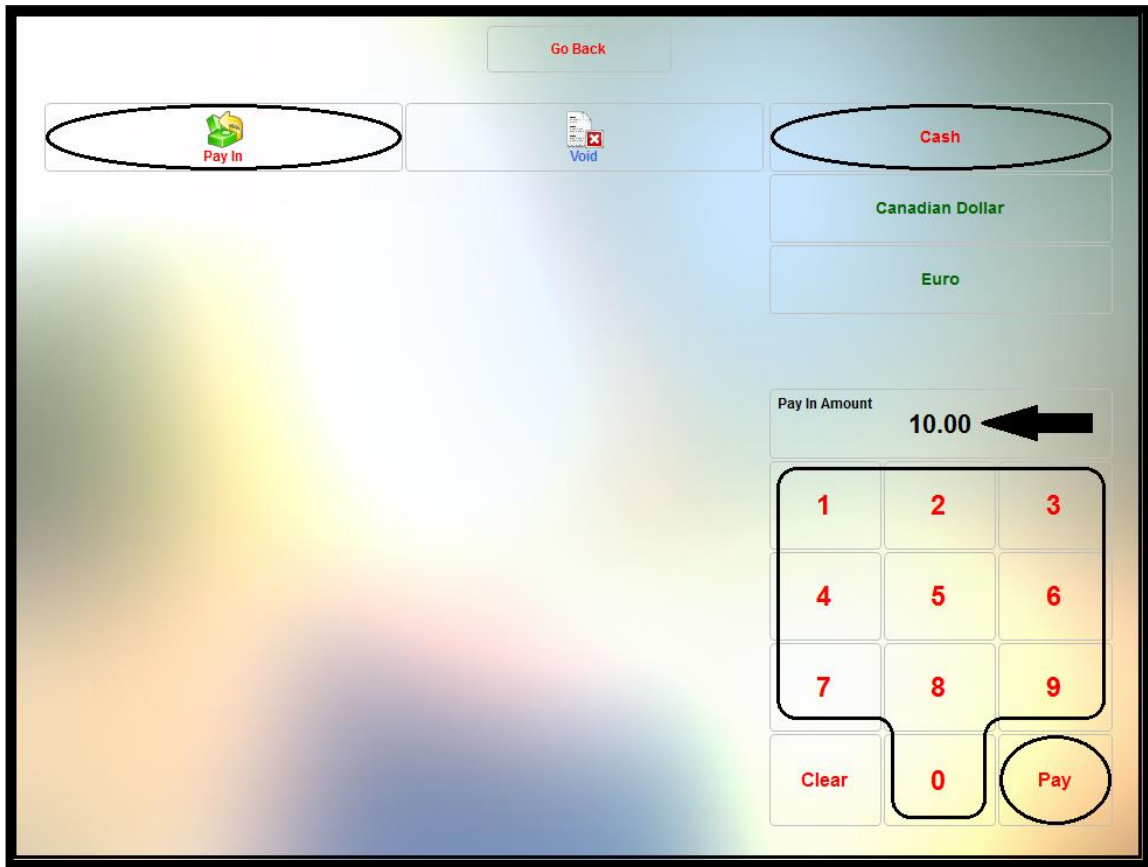


Figure 39-21

Void

Use the void button of the Pay In feature to reverse a pay in that was performed previously. To do so, click the *Void* button to display a list of the pay ins that may be reversed.

Select the desired pay in by clicking on its respective button (See Figure 39-22).

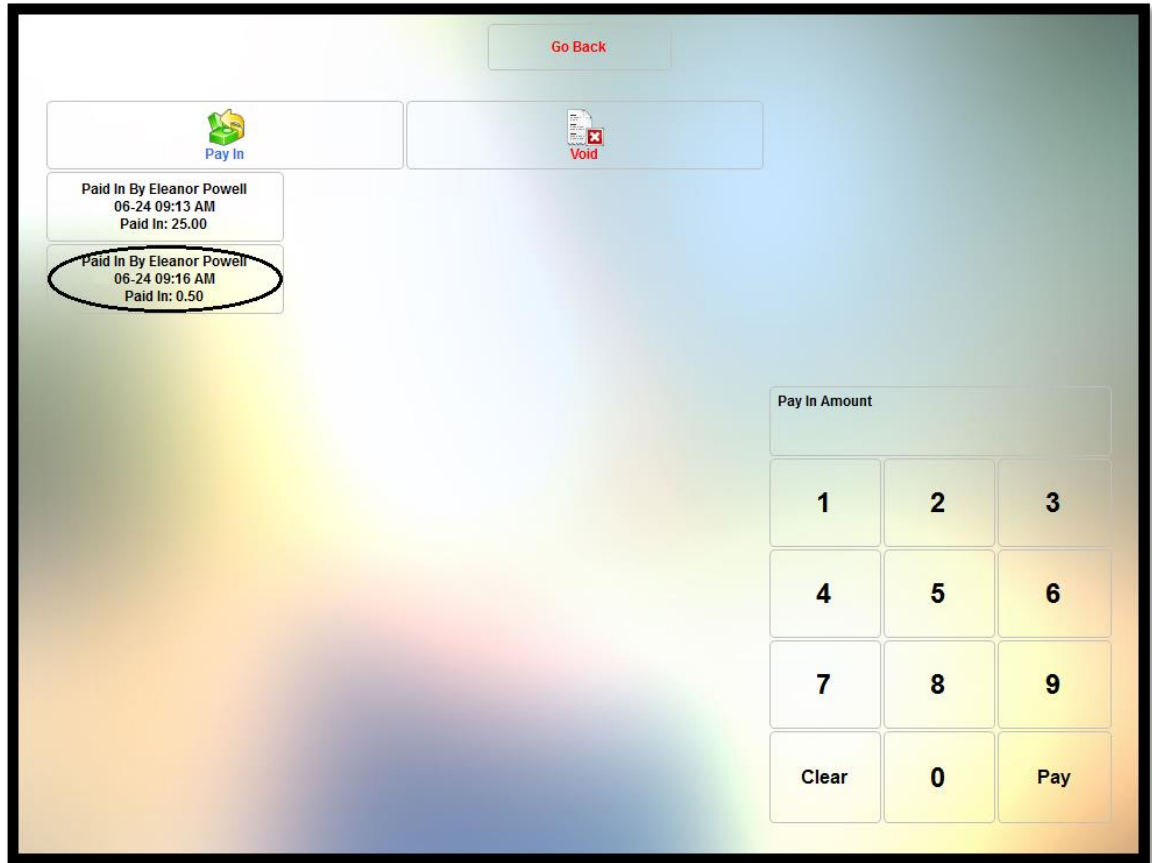


Figure 39-22

A confirmation screen follows. To finalize the void, select the *YES ... Perform Void Now* button (See Figure 39-23).

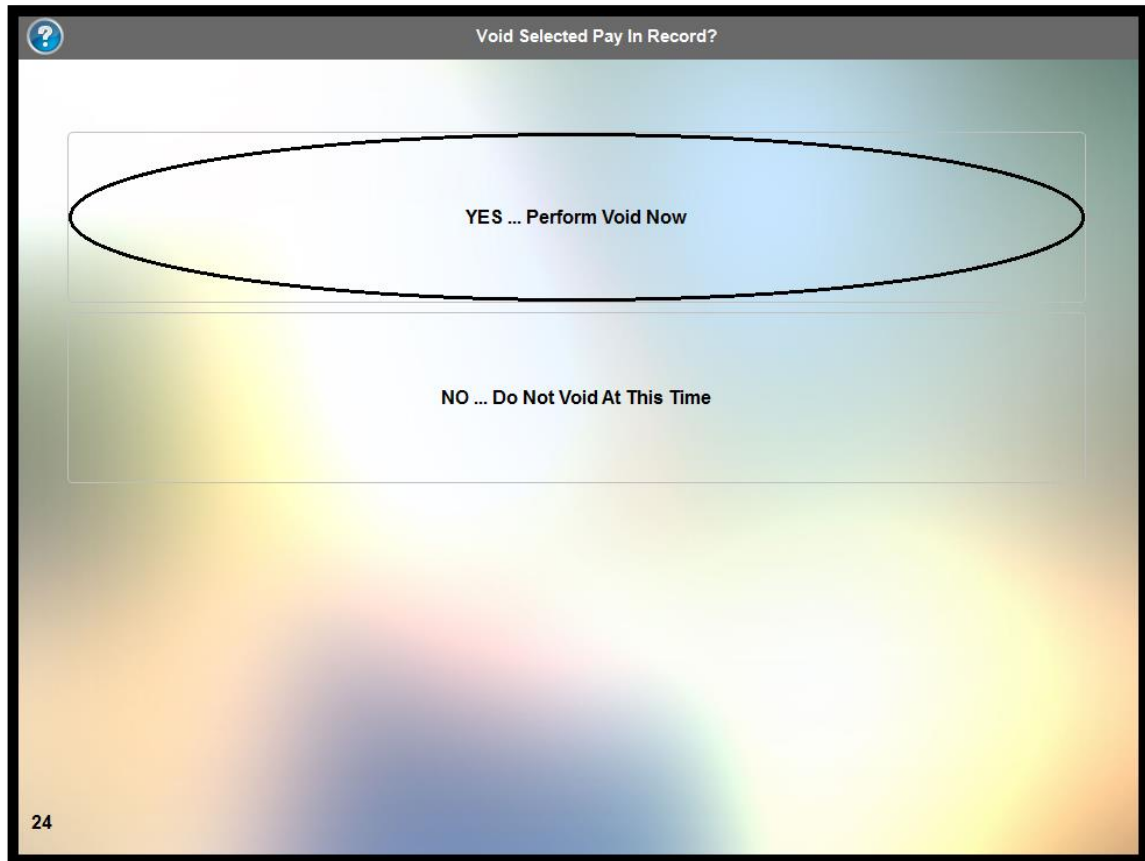


Figure 39-23

Pay Out

A Pay Out transaction is performed whenever cash is removed from an employee's server bank. Pay Outs may be performed for several reasons: to pay an employee for the gratuities paid by credit card that he earned on his shift, to pay a payee in cash, to give an employee a cash advance on his future wages, or to remove excess cash and deposit it in the company safe.

Tip Out

The Tip Out feature of XERA® POS allows the management to immediately pay employees the gratuities to which they are entitled.

To do so, click the *Tip Out* button to display the total tip pool. This amount displays on the face of the *Tip Out* button and is the total of all gratuities that have been paid by the customers and entered into the system.

Next, select the employee you wish to pay by clicking the appropriate button and then select the currency in which to pay the employee by clicking on its respective button.

Finally, enter the amount to pay the employee by using the virtual numeric keypad at the bottom-right of the screen. As you enter the amount, it displays in the Pay Out Amount field directly above the virtual numeric keypad.

When finished, click the *Pay* button and pay this amount to the employee from the cash in the employee's server bank (See Figure 39-24).

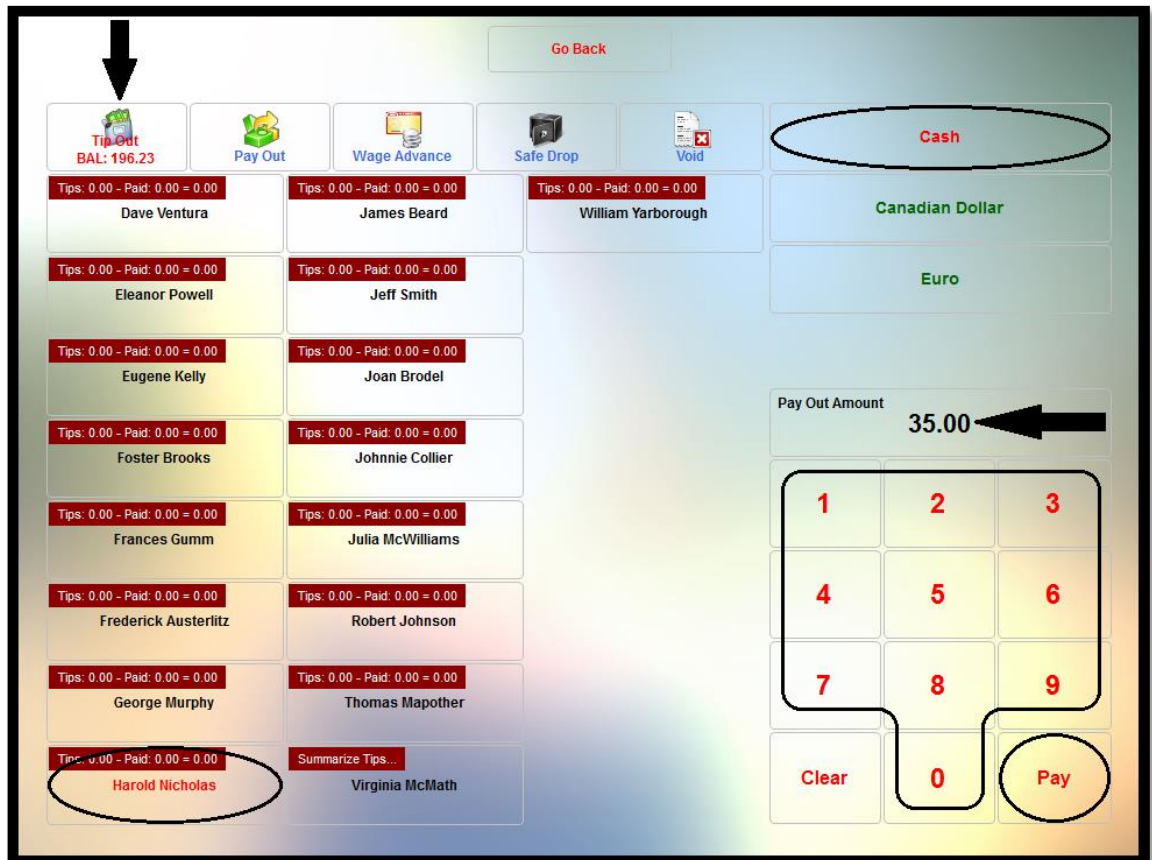


Figure 39-24

Once the *Pay* button is clicked, the new tip pool balance appears on the face of the *Tip Out* button and the amount paid to the employee appears on the face of his respective button in the grid (See Figure 39-25).

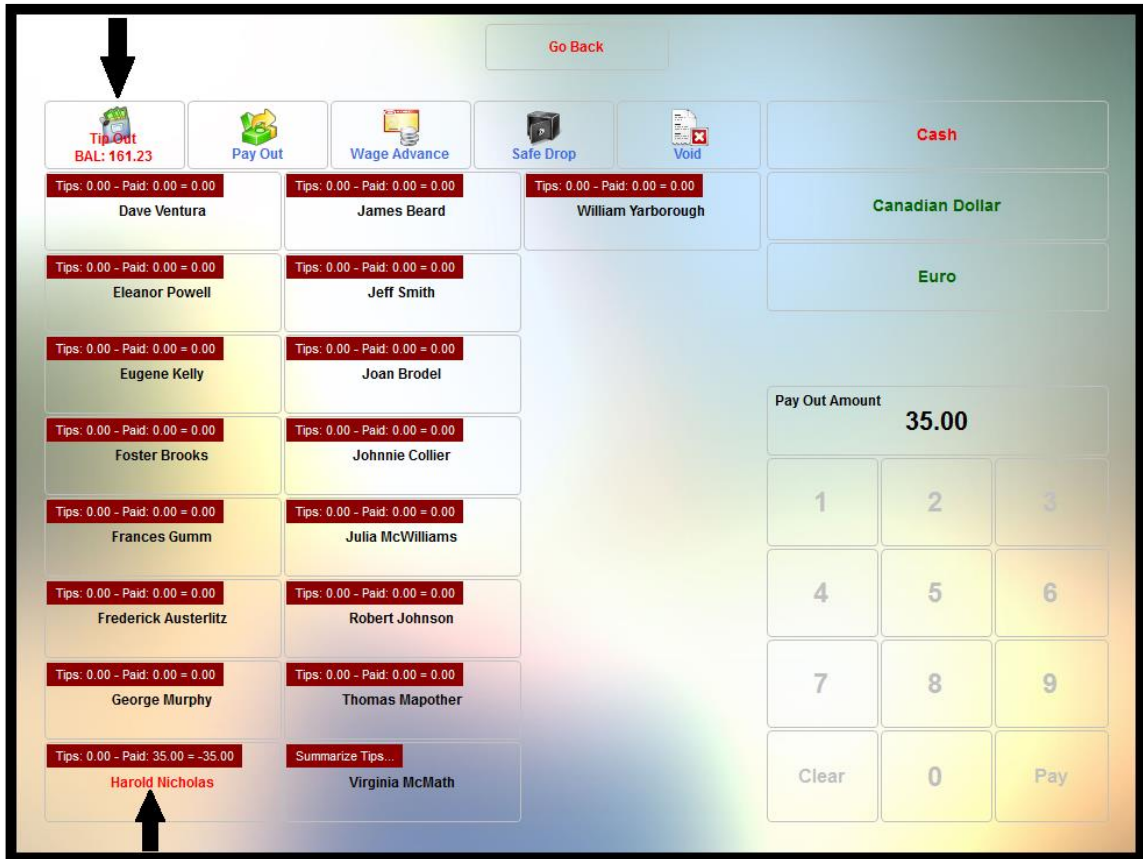


Figure 39-25

When finished, click the *Go Back* button to exit the Tip Out feature and return to the previous screen.

Pay Out (to a Payee)

A Pay Out to a payee is performed when money is owed to the payee and the manager wishes to pay the payee in cash.

For example, a restaurant may deal with a vendor who brings several bouquets of fresh flowers to the restaurant every morning, for which he collects daily in cash. To perform a Pay Out to a payee, click the *Pay Out* button on the Pay Out screen and then click anywhere in the Payee field to display the virtual keyboard. Enter the name of the payee and then click the keyboard's *Enter* or *OK* button to commit the name to the Payee field.

Next, click anywhere in the Description field and enter a description of the Pay Out transaction. For the example above, this may include the company name, the invoice number, and the invoice date of the transaction. Click the virtual keyboard's *Enter* or *OK* button to commit the entered information to the Description field.

Finally, enter the monetary amount of the pay out by using the virtual numeric keypad displayed in the lower right portion of the Pay Out screen.

Be sure to click the *Pay* button when finished (See Figure 39-26).

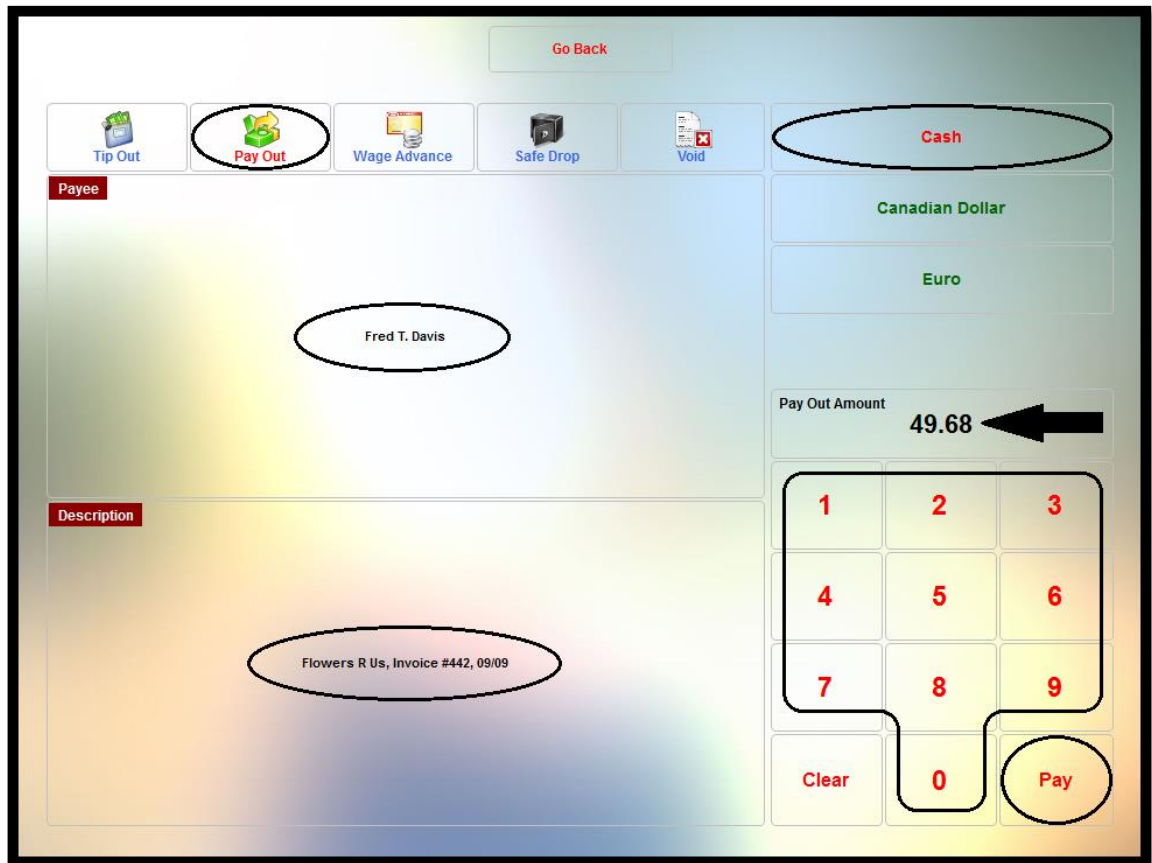


Figure 39-26

When finished, pay the payee from the cash in the employee's server bank.

Wage Advance

A Wage Advance is performed when the manager agrees to allow an employee to take a cash advance against his unpaid wages. This advance is recorded in the database and available to the manager when the next payroll is performed so that the advance may be deducted from the employee's next paycheck.

To perform a wage advance, click the *Wage Advance* button on the Pay Out screen. Select the employee to whom the wage advance is being paid by clicking on the button displaying his name on the left side of the screen.

Finally, enter the monetary amount of the wage advance by using the virtual numeric keypad displayed in the lower-right portion of the Wage Advance screen.

Be sure to click the *Pay* button when finished (See Figure 39-27).

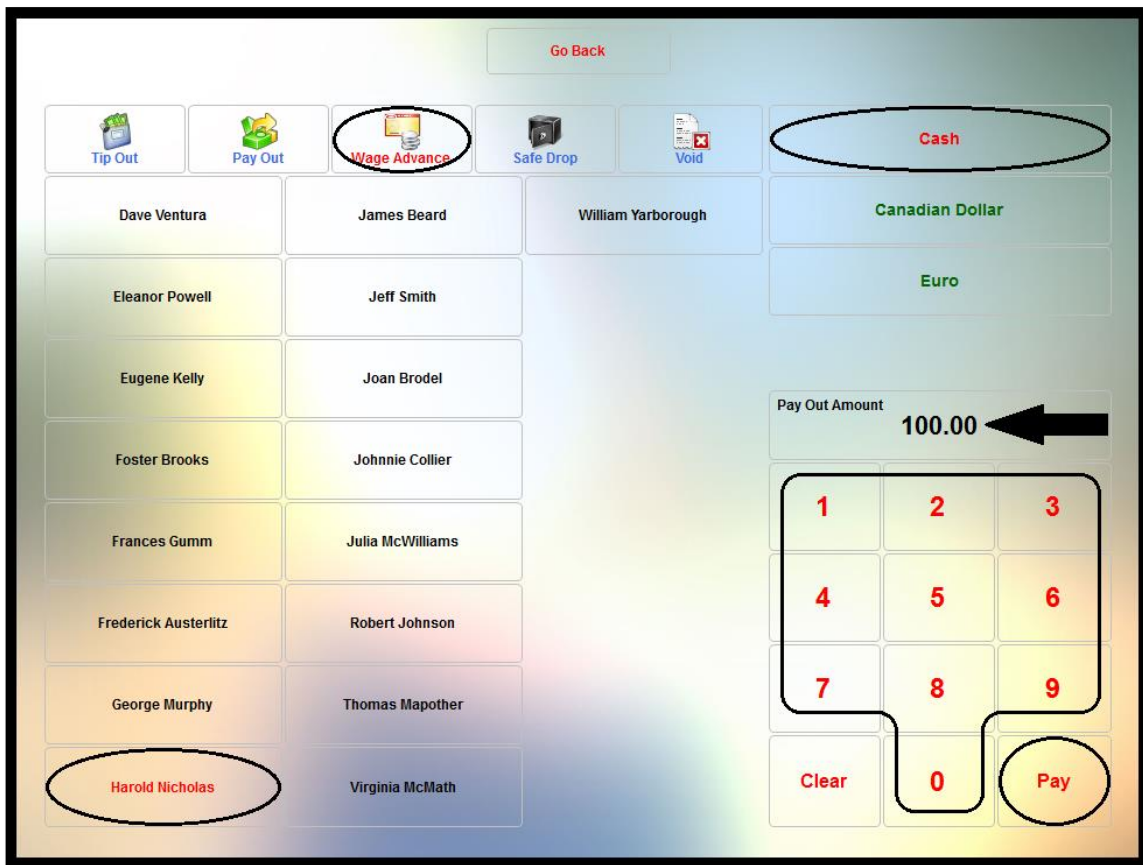


Figure 39-27

When finished, pay the wage advance to the employee from the cash in the employee’s server bank.

Safe Drop

A Safe Drop is performed when excess cash that has accumulated in the employee’s server bank is removed by the manager and deposited in the store safe. The amount removed is recorded in the database and remains a part of the cash that must be accounted for at the end of the server bank employee’s shift.

To perform a safe drop, click the *Safe Drop* button on the Pay Out screen. Select the type of currency that is being removed from the cash tray by clicking on the appropriate button on the right side of the screen. Next, remove the excess cash from the employee's cash tray.

Finally, enter the monetary amount of the safe drop by using the virtual numeric keypad displayed in the lower-right portion of the Safe Drop screen.

Be sure to click the *Pay* button when finished and deposit the cash in the store safe as per company policy (See Figure 39-28).

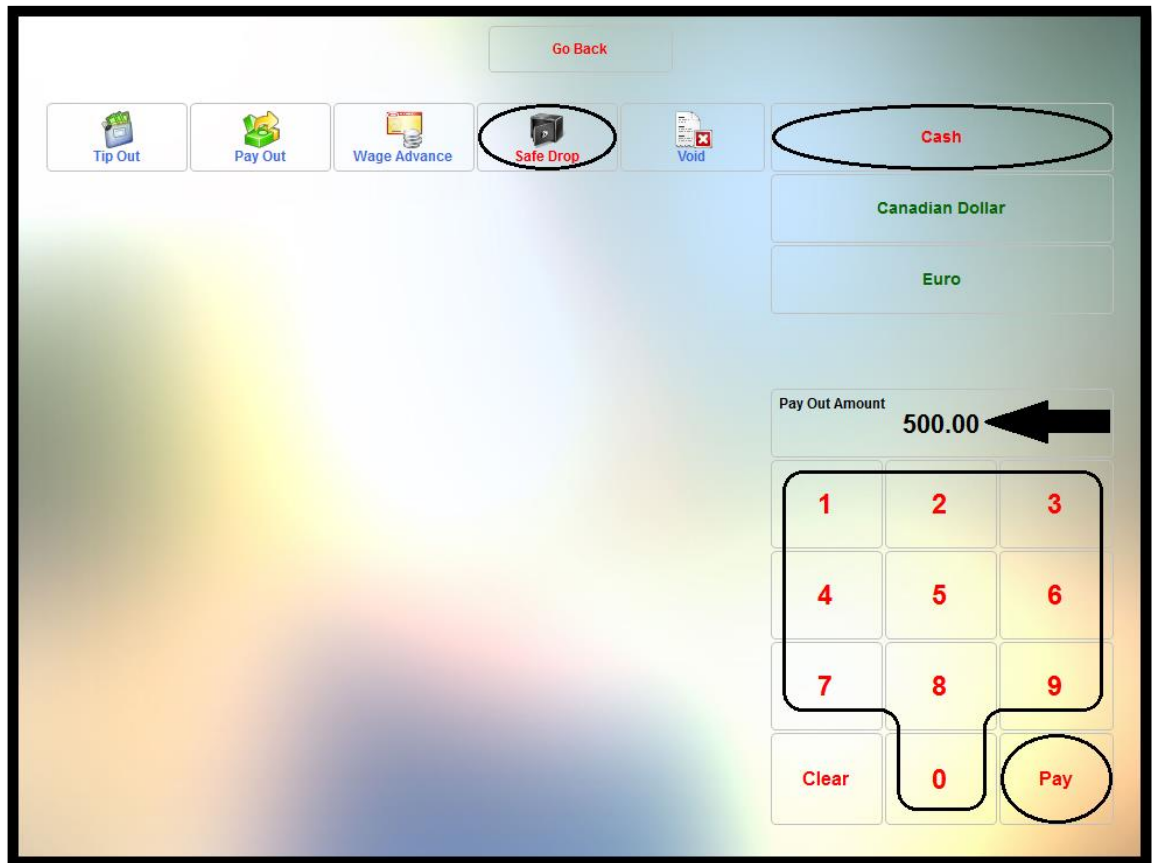


Figure 39-28

Void

The *Void* button is used to reverse a previous payout transaction.

To void a payout transaction, click the *Void* button and then select the payout transaction you wish to void by clicking on its button in the grid.

All four types of payout transactions may be voided in this manner (See Figure 39-29).

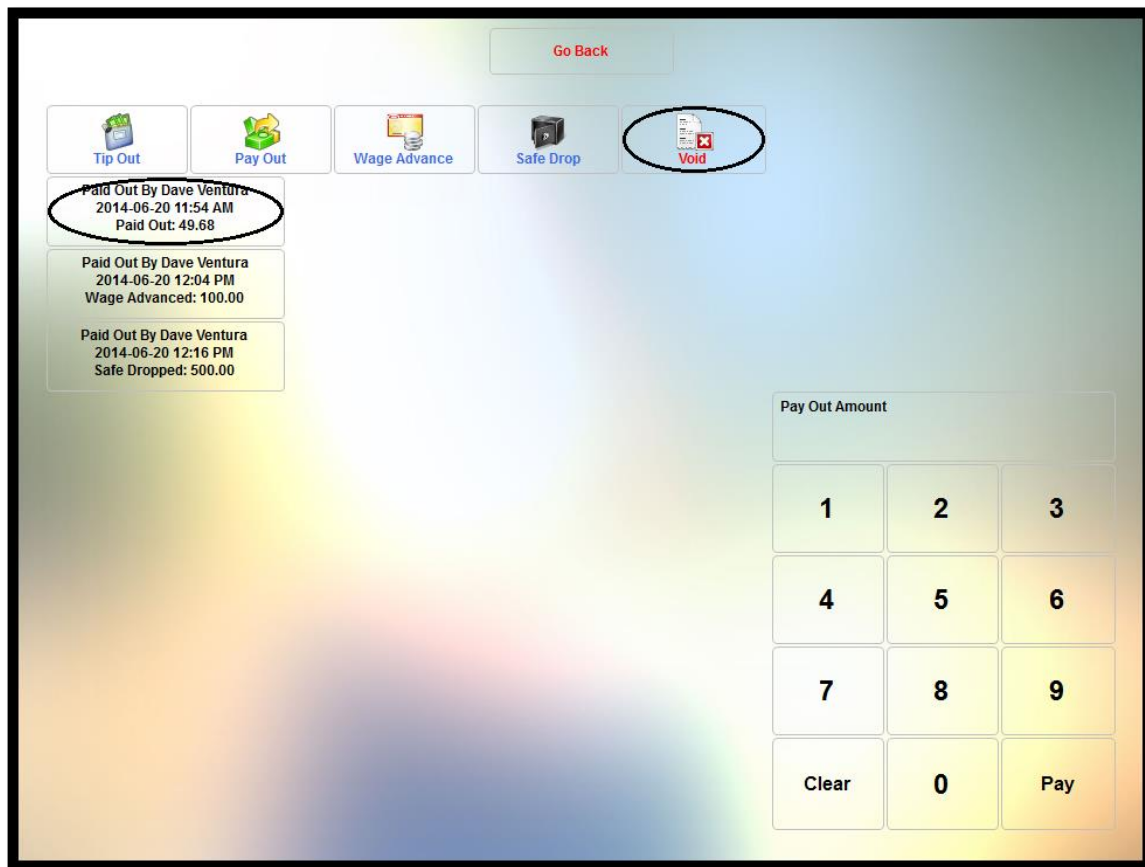


Figure 39-29

On the confirmation window that appears, click the *Yes ... Perform Void Now* button to confirm the void of the payout transaction (See Figure 39-30).

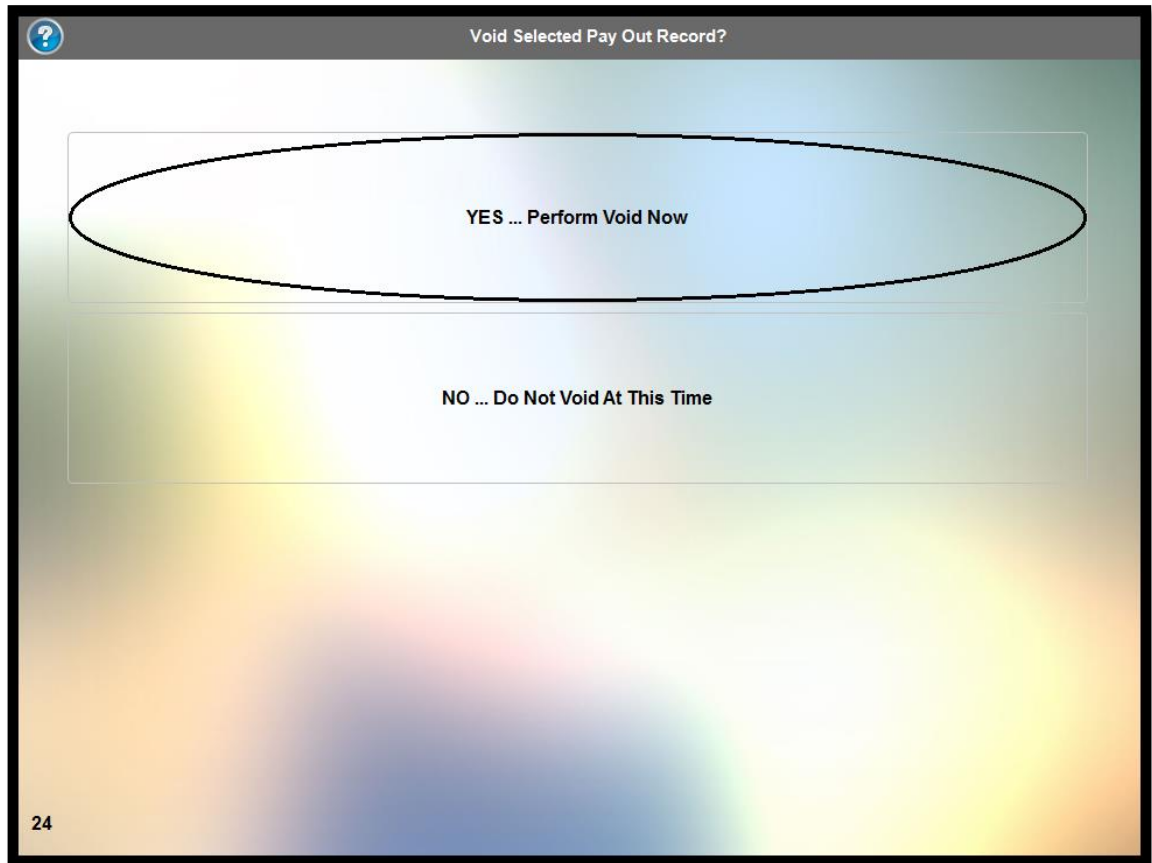


Figure 39-30

Edit Gratuity

The *Edit Gratuity* button is used to adjust a gratuity on a previously settled guest check. Click the button to display the Edit Gratuity screen. This screen displays each order that was settled using Aldelo® EDC. It also shows the total payments, the total gratuities, the cumulative gratuity percentage, and the summary total. Select the order to which you wish to adjust the gratuity by clicking on its respective button (a guest check button displayed in blue indicates that no gratuity exists for the guest check [See Figure 39-31]).



Figure 39-31

Clicking a guest check button enables the virtual numeric keypad. Enter the new gratuity amount via this keypad. As the new gratuity amount is entered, it displays on the screen in the New Gratuity field, directly above the virtual keypad.

Click the keypad's *Pay* button when finished (See Figure 39-32).

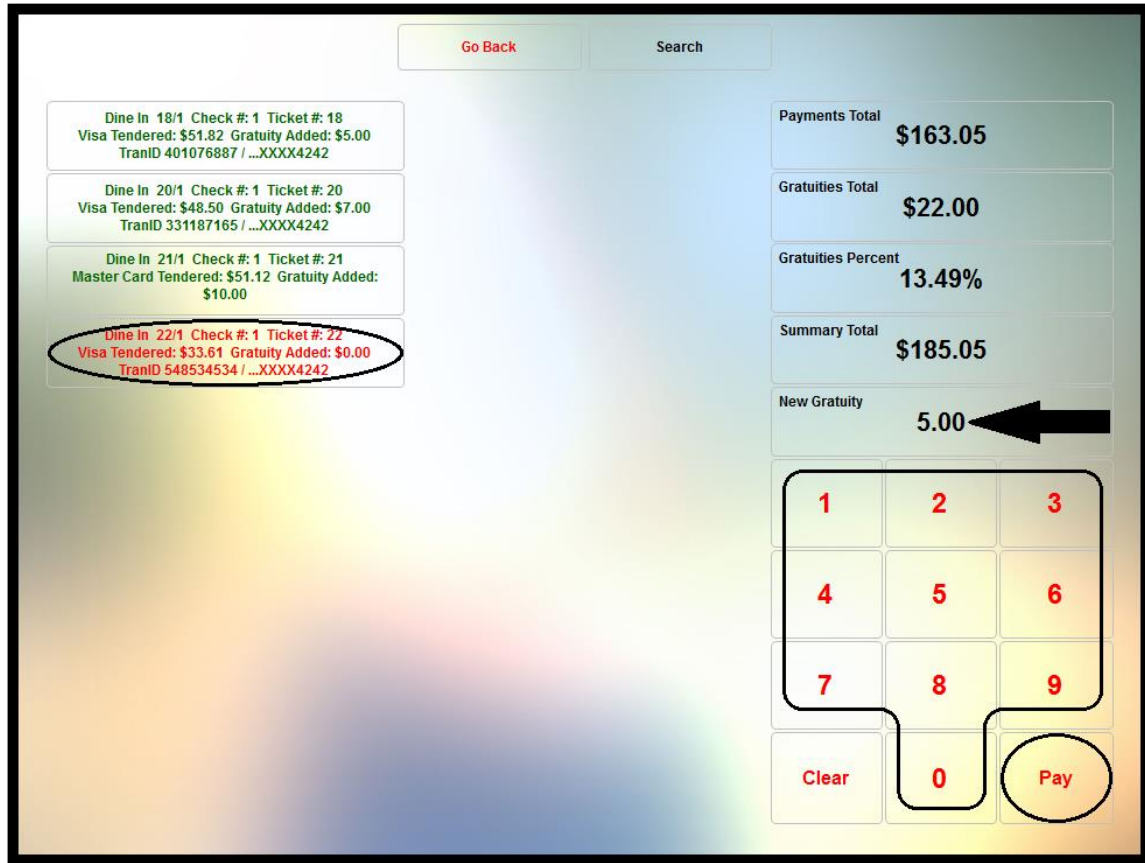


Figure 39-32

Upon clicking the *Pay* button, the order's guest check button and the fields on the right side of the screen are updated to reflect the adjustment (See Figure 39-33).

The screenshot displays a POS interface with a 'Go Back' button at the top left and a 'Search' button at the top right. On the left side, there are four order details boxes, each with a black arrow pointing to the right:

- Order 18:** Dine In 18/1 Check #: 1 Ticket #: 18
 Visa Tendered: \$51.82 Gratuity Added: \$5.00
 TranID 401076887 / ...XXXX4242
- Order 20:** Dine In 20/1 Check #: 1 Ticket #: 20
 Visa Tendered: \$48.50 Gratuity Added: \$7.00
 TranID 331187165 / ...XXXX4242
- Order 21:** Dine In 21/1 Check #: 1 Ticket #: 21
 Master Card Tendered: \$51.12 Gratuity Added: \$10.00
- Order 22:** Dine In 22/1 Check #: 1 Ticket #: 22
 Visa Tendered: \$38.61 Gratuity Added: \$5.00
 TranID 548534534 / ...XXXX4242

On the right side, there is a summary section with black arrows pointing to the left:

- Payments Total:** \$163.05
- Gratuities Total:** \$27.00
- Gratuities Percent:** 16.56%
- Summary Total:** \$190.05

Below the summary is a 'New Gratuity' section with a numeric keypad:

1	2	3
4	5	6
7	8	9
Clear	0	Enter

Figure 39-33

When finished editing the gratuity, click the *Go Back* button to return to the previous screen.

Search

To find an order by order number, click the *Search* button to enable the virtual numeric keypad in the lower-right portion of the screen. Enter the order number and then click the *Enter* button on the keypad.

If the order is found, a button displays that shows the existing order information. A summary of the order also appears in the fields on the right side of the screen.

Select the order button and edit the gratuity as described above (See Figure 39-34).

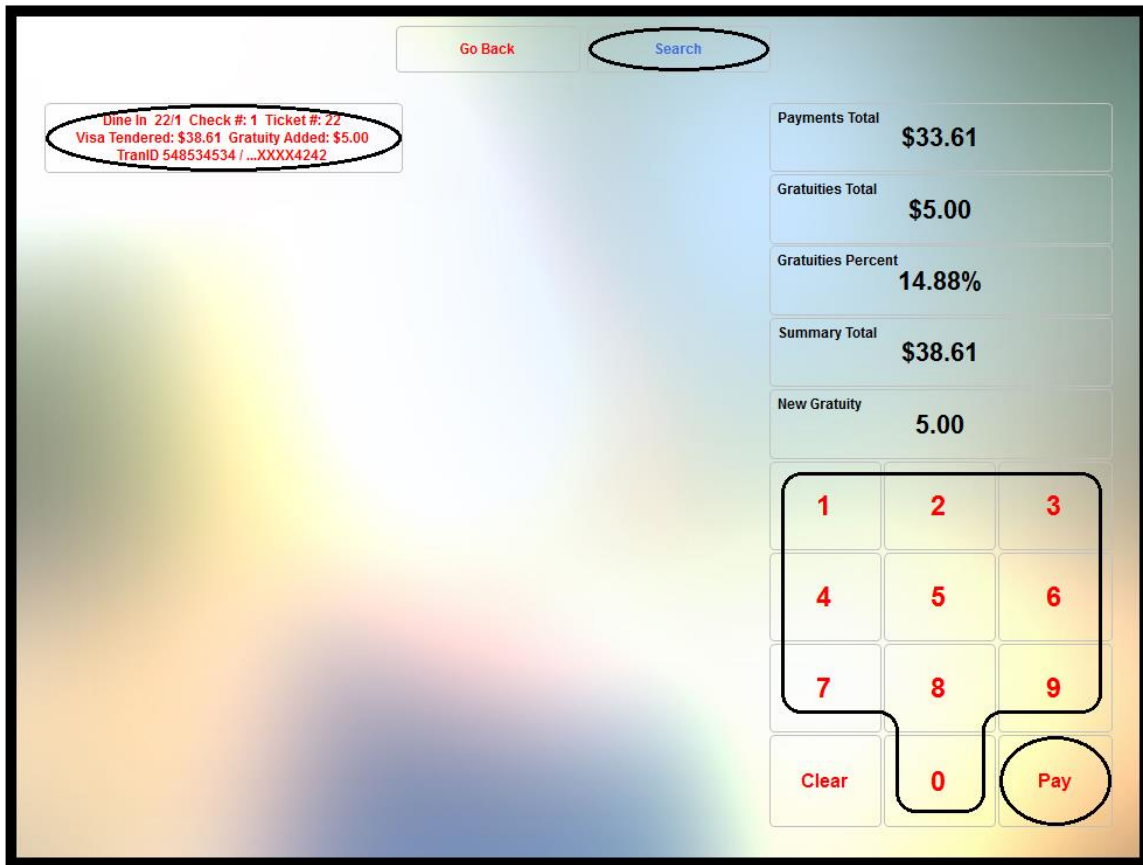


Figure 39-34

When finished editing the gratuity, click the *Go Back* button to return to the previous screen.

Cashier Report

The Cashier Report displays all of the payment activity that has occurred during a server bank employee's shift. The report also includes the beginning server bank cash balance and the total expected amount of all tender types on hand at the time the report is run.

If the length of the report exceeds the limits of the screen, the scroll buttons on the right side of the screen may be used to move the report up or down so that the hidden areas may be viewed. The report may be printed by clicking the *Print* button on the right side of the screen (See Figure 39-35).

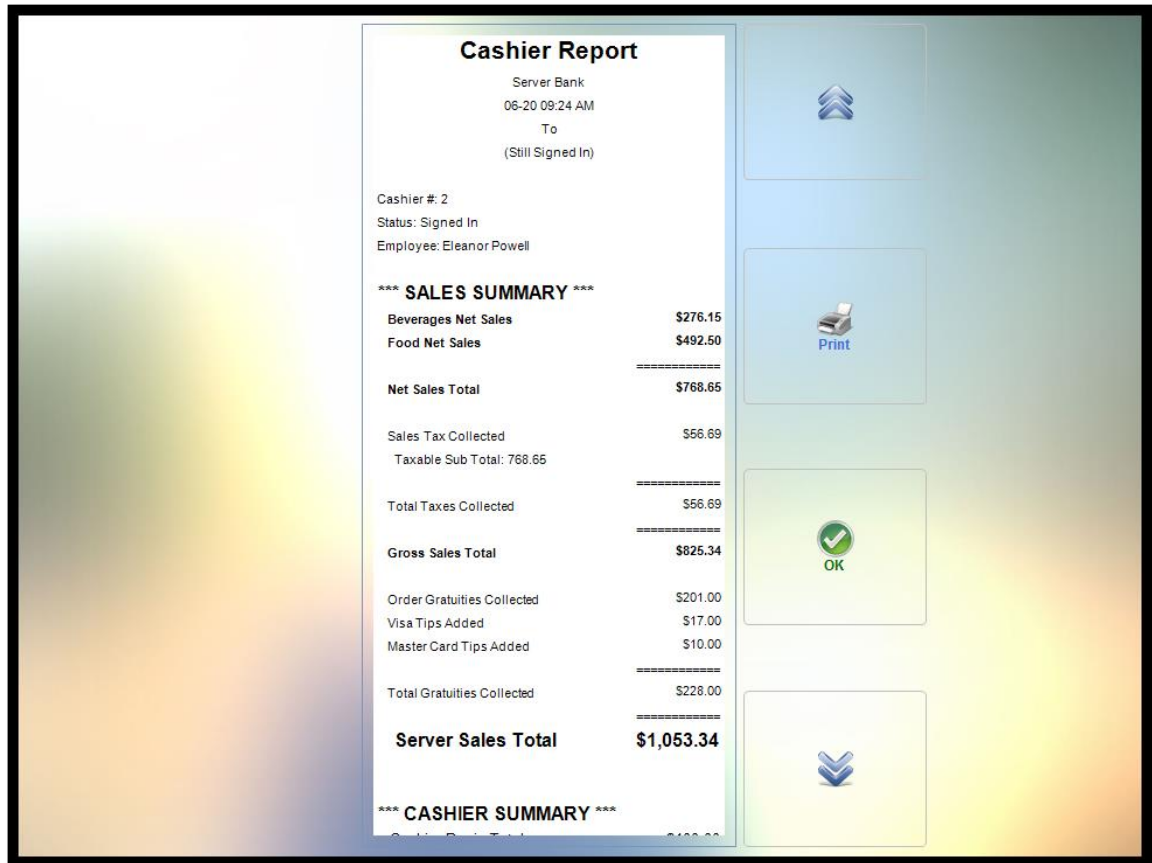


Figure 39-35

Blind Close

A blind close is the closing of an employee's server bank without performing the reconciliation process. A blind close allows a staff member to reconcile his server bank at a later time or to assume that the server bank count is correct without reconciliation. A blind close may also be performed by one staff member on the server bank of a different staff member, if necessary.

To perform a blind close, click the *Blind Close* button. The following screen asks the user to confirm that he indeed wishes to mark the selected server bank as blind closed. Click the *Yes...Mark Selected Cashier As Blind Closed* button to complete the blind close and return to the previous screen (See Figure 39-36).

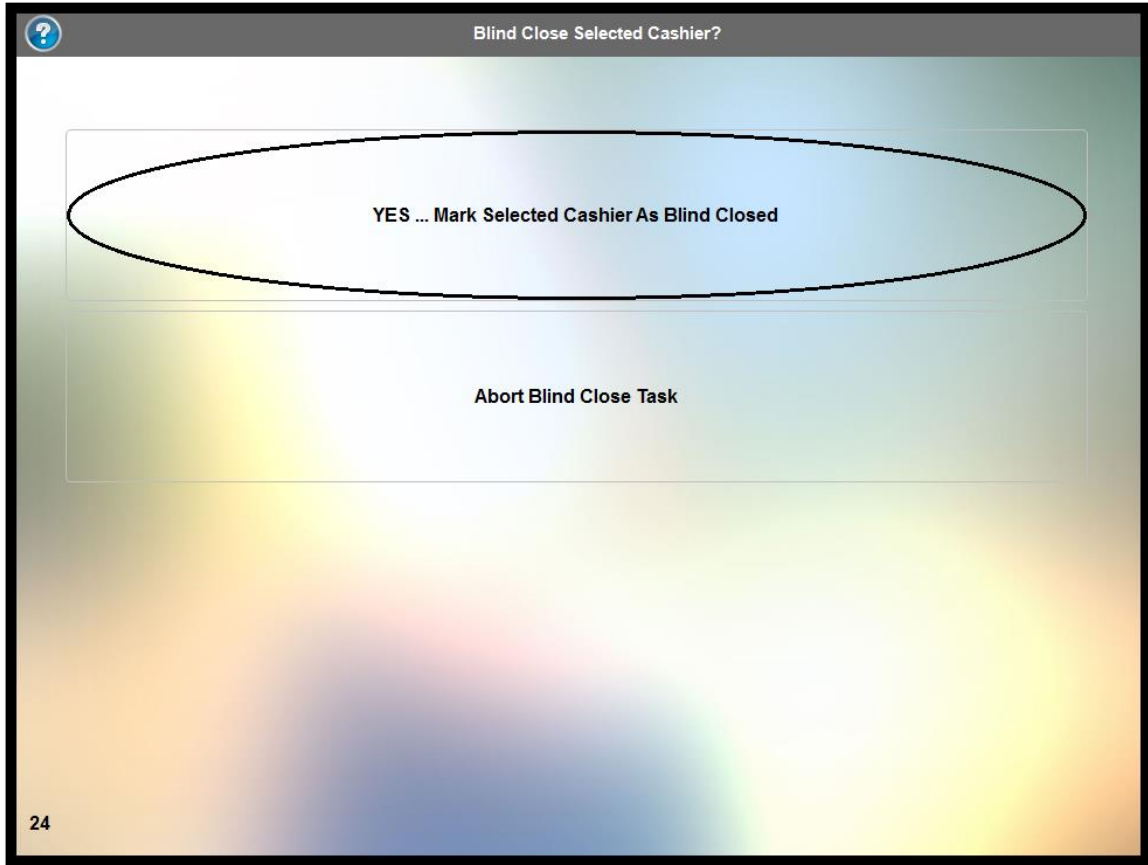


Figure 39-36

To exit the Blind Close Selected Cashier screen without completing the blind close, click the *Abort Blind Close Task* button.

Sign Out

The Sign Out feature allows the user to close and reconcile his server bank. Click the *Sign Out* button to display the Sign Out screen (See Figure 39-37).

The screenshot shows the Sign Out screen with the following layout:

Current Action	Total Expected	Total On Hand	Cashier Short
Sign Out	\$1,022.01	\$0.00	(\$1,022.01)

Tender Type	Amount	Additional Cash ...	Cashier Short
Cash	Canadian Dollar	Additional Cash ...	\$0.10 X ...
Visa	Euro	\$100.00 X ...	\$0.05 X ...
Master Card		\$50.00 X ...	\$0.01 X ...
Debit Card		\$20.00 X ...	
Gift Card		\$10.00 X ...	
EBT Card		\$5.00 X ...	
		\$2.00 X ...	
		\$1.00 X ...	
		\$0.50 X ...	
		\$0.25 X ...	

1	2	3
4	5	6
7	8	9
Clear	0	Enter

Figure 39-37

Performing the Final Count

The final count is made by counting the total number of each denomination of currency and coin and entering it into the Sign Out screen.

For example, count the total number of \$20.00 bills that remain in the server bank, click the *\$20.00 X...* button, enter the number of twenties counted into the virtual keypad in the lower-left corner of the screen, and then click the *Enter* button. The total dollar amount of twenties is applied to the Total On Hand figure near the top of the screen. Repeat this procedure for each of the denominations of currency and coin remaining in the server bank until you have entered all of them.

Next, click on each of the other tender types displayed on the Sign Out screen in turn and enter them as well. If the tender type is a foreign currency, the procedure is similar to that described above.

For credit, debit, and gift card tender types, simply click the tender type button to display a list of all of the transactions that were recorded for the tender type. These transactions are automatically applied to the count, thus increasing the Total On Hand figure. Click on each of the tender type buttons, even if the quantity to enter is zero.

When you are finished counting the server bank and have entered everything as described above, the Total Expected figure is automatically deducted from the Total On Hand figure to reveal the final Total Discrepancy figure. A negative number for the total discrepancy indicates a shortage in the Total On Hand amount. A positive number for the total discrepancy indicates an overage in the Total On Hand amount (See Figure 39-38).

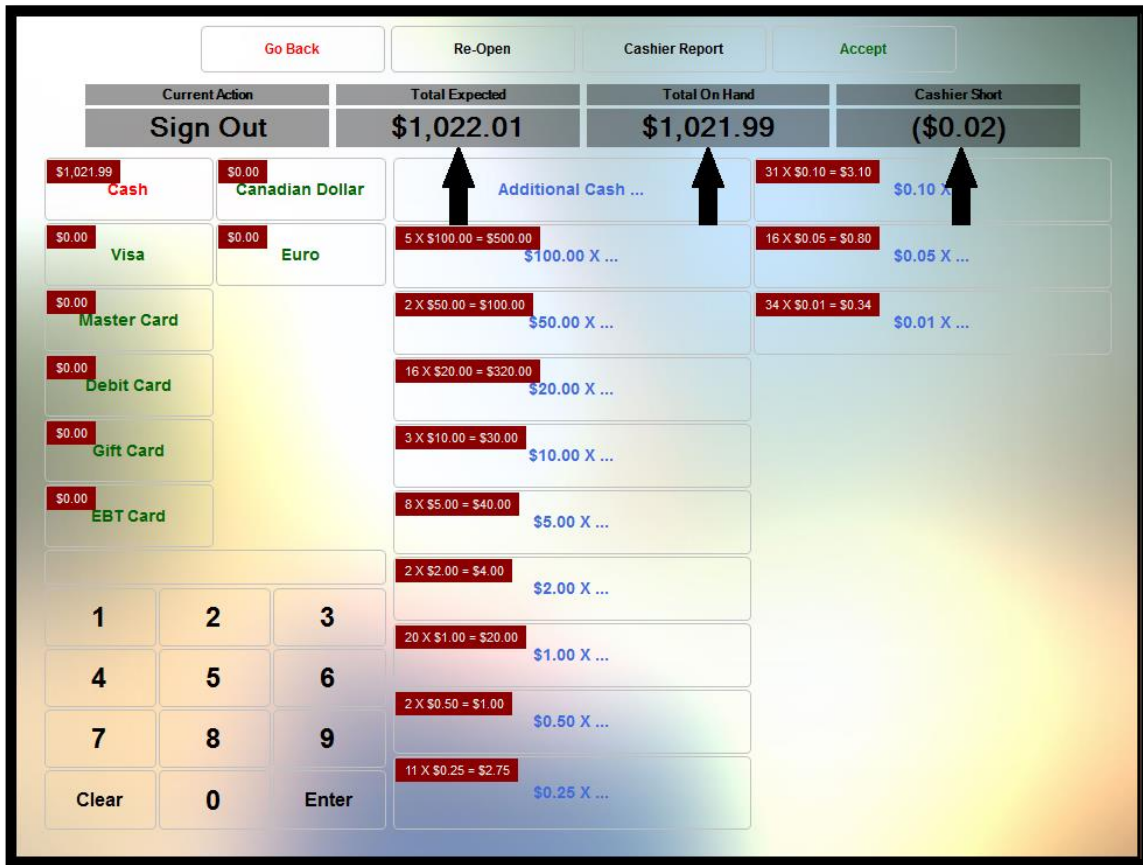


Figure 39-38

Go Back

Click the *Go Back* button if you wish to cancel the sign out procedure and return to the previous screen.

Re-Open

Click the *Re-Open* button if you wish to cancel the sign out procedure and re-open the server bank.

Cashier Report

Click the *Cashier Report* button to display the current cashier report on the screen. The Cashier Report is described on page 363 of this manual.

Accept

When you finish entering the count and are satisfied that it is correct, click the *Accept* button to complete the sign out process.

ALL CASH DRAWERS

The All Cash Drawers feature gives the user access to all open cash drawers for the purpose of performing a blind close. Click the *All Cash Drawers* button to display the Select Cash Drawer To Continue window. Select the cash drawer that you wish to close by clicking on its respective button (See Figure 39-39).

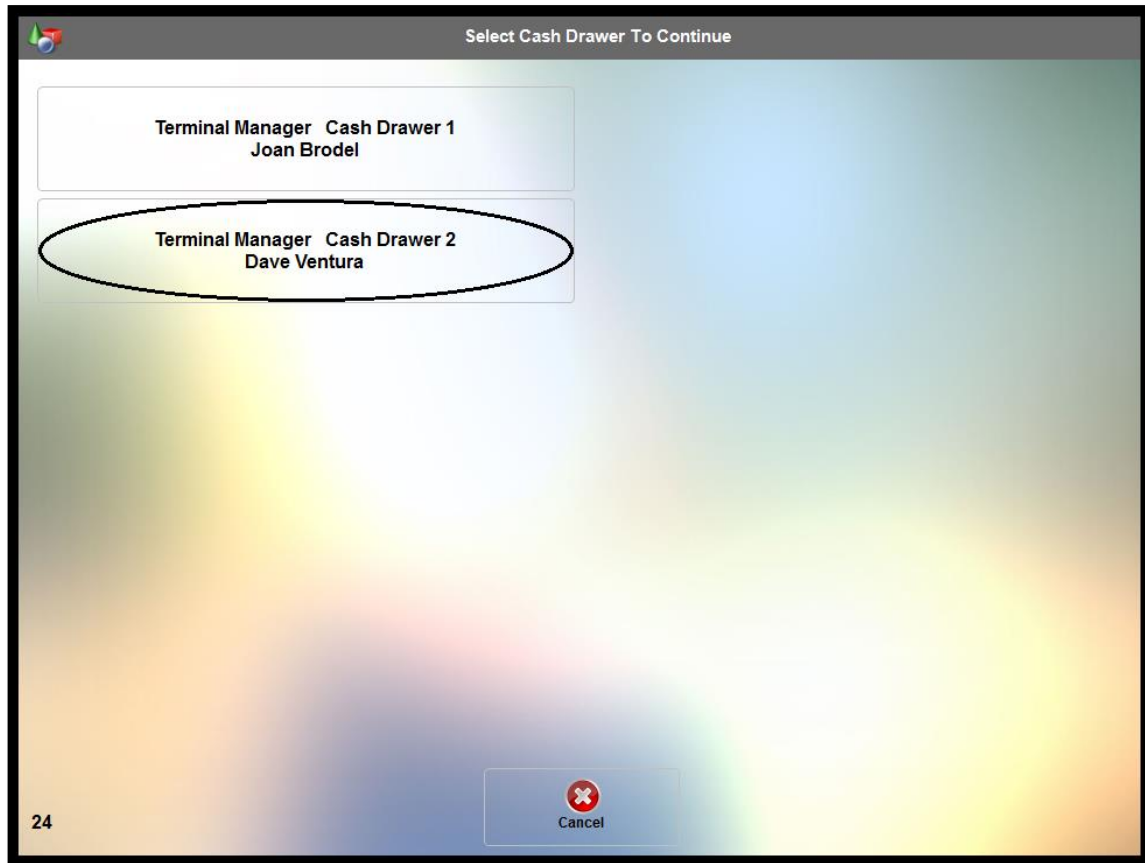


Figure 39-39

Blind Close

A blind close is the closing of an employee's cash drawer or staff bank without performing the reconciliation. To perform a blind close, follow the steps listed under the Blind Close section on page 383 of this manual.

ALL SERVER BANKS

The All Server Banks feature gives the user access to all open server banks. Click the *All Server Banks* button to display the Select Server Bank to Continue screen. Select the desired server bank by clicking on its respective button (See Figure 39-40).

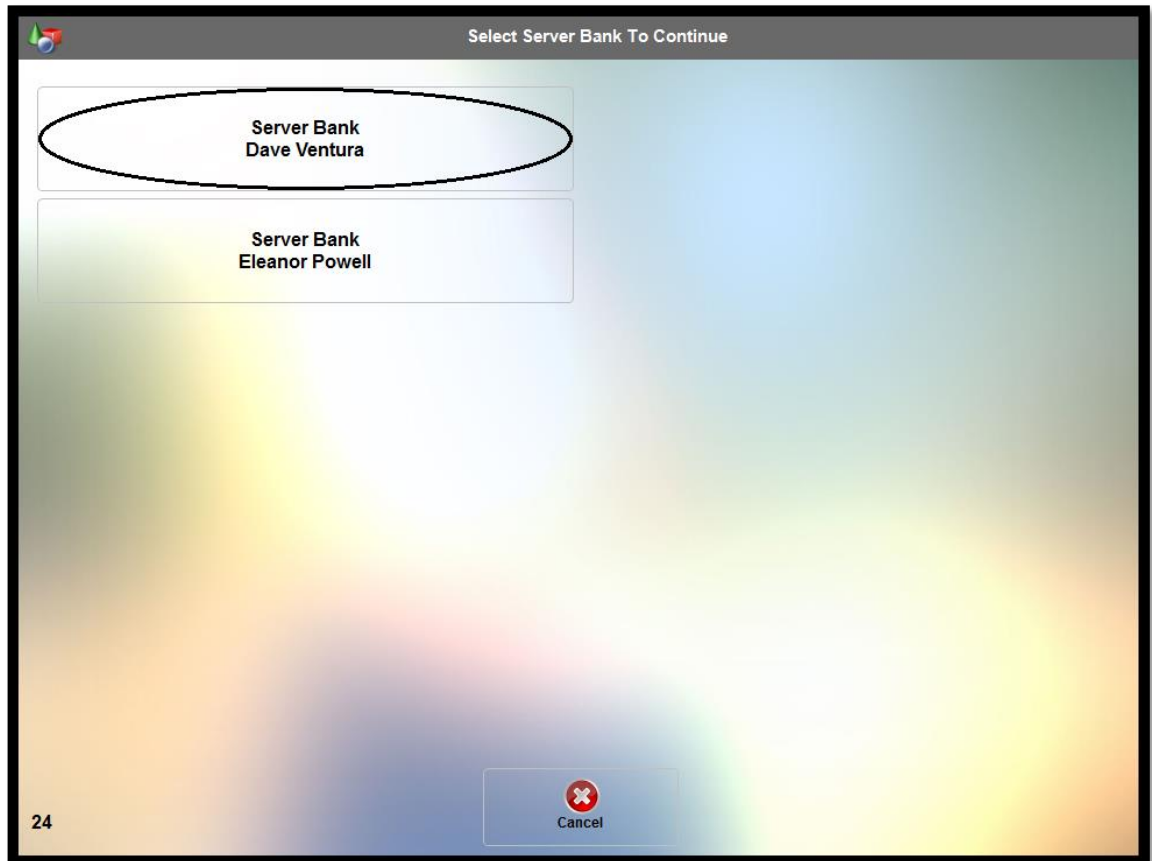


Figure 39-40

Pay In

A Pay In is performed when additional money is added to the employee's server bank after the initial count. To perform a pay in, follow the steps listed under the Pay In section on page 370 of this manual.

Pay Out

A Pay Out is performed whenever cash is removed from an employee's server bank. To perform a Pay Out, follow the steps listed under the Pay Out section on page 372 of this manual.

Edit Gratuity

The *Edit Gratuity* button is used when an adjustment must be made to a gratuity on a previously settled guest check. To edit a gratuity, follow the steps listed under the Edit Gratuity section on page 379 of this manual.

Cashier Report

The cashier report displays all of the payment activity that has occurred during a server bank employee's shift. To display the Cashier Report, follow the steps listed under the Cashier Report section on page 382 of this manual.

Blind Close

A blind close is the closing of an employee's server bank without performing the reconciliation process. To perform a blind close, follow the steps listed under the Blind Close section on page 383 of this manual.

Sign Out

The Sign Out feature allows the user to close and reconcile his server bank. To perform a sign out, follow the steps listed under the Sign Out section on page 385 of this manual.

CASHIER RECONCILE

The Cashier Reconcile feature allows the user to recall a cash drawer or server bank that has been blind closed to perform the reconciliation.

Click the *Cashier Reconcile* button to display the server banks and cash drawers that were blind closed. Select the cashier or server bank you wish to reconcile by clicking on its respective button (See Figure 39-41).

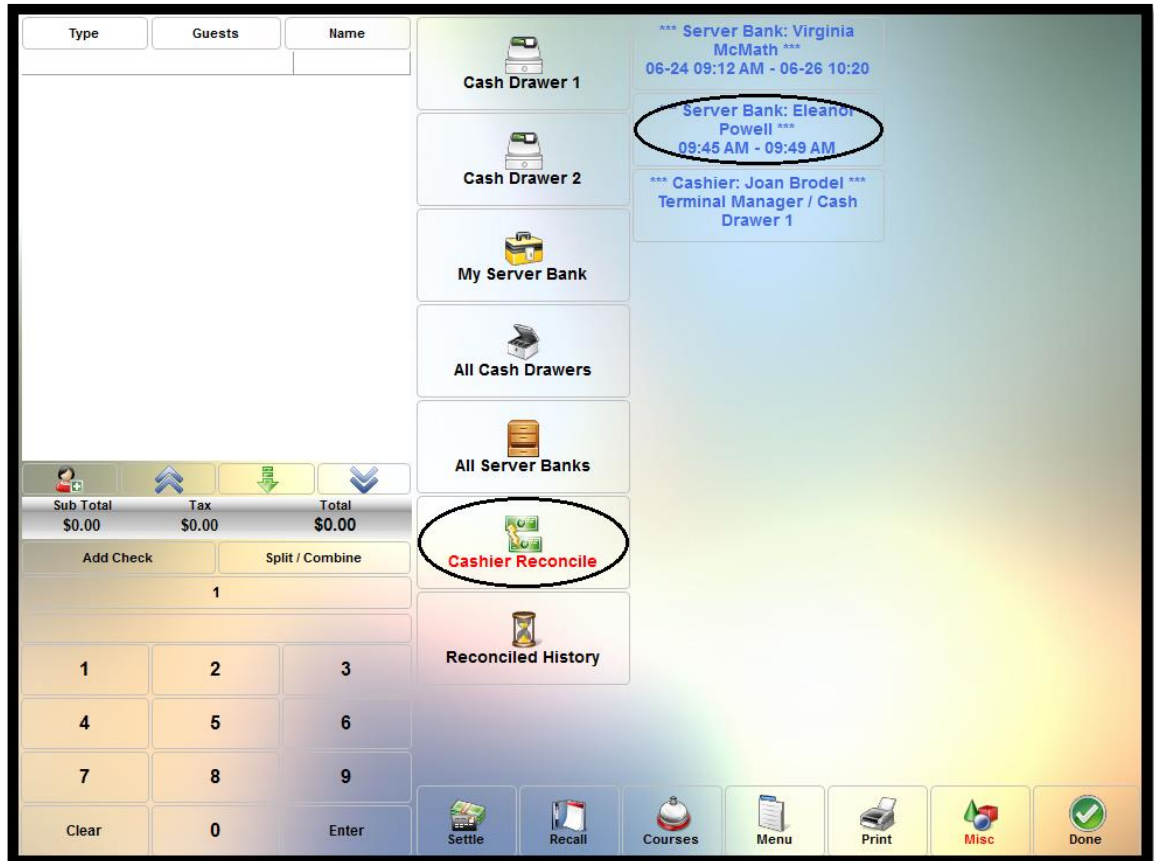


Figure 39-41

The Sign Out screen displays. To perform the reconciliation, follow the procedure for the appropriate reconciliation type (cash drawer reconciliation or server bank reconciliation) listed in the Sign Out section on page 385 of this manual.

RECONCILED HISTORY

The Reconciled History feature of XERA® POS allows the user to display the cashier report for any cashier or server bank that was reconciled on a particular date. To use the feature, click the *Reconciled History* button to display the Select Cashier Signed In Date screen. Select the desired month, day of the month, and year by using the appropriate *up arrow* and *down arrow* buttons.

Once the desired date is selected, click the *OK* button to return to the previous screen. (See Figure 39-42).

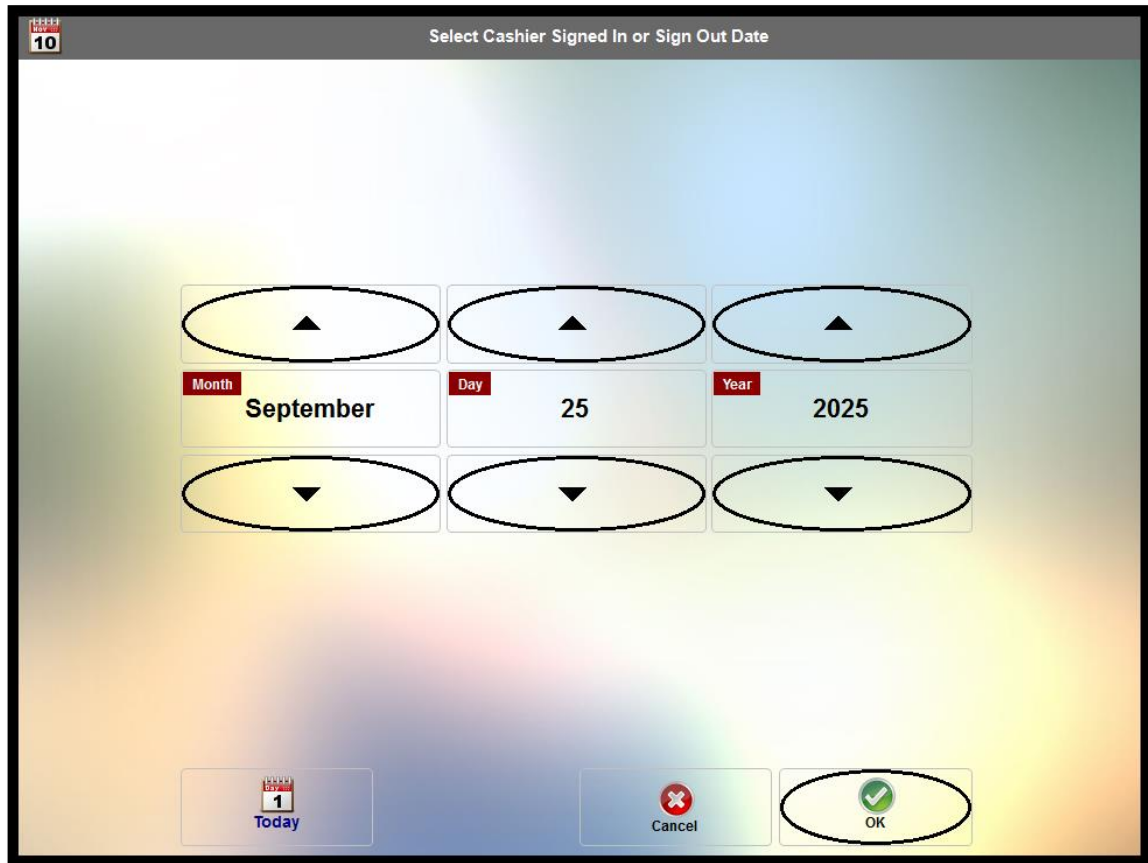


Figure 39-42

The reconciliations from the selected date display on the screen. Select the reconciliation for which you wish to view the cashier report by clicking on its respective button. This action displays the cashier report on the screen.

End of Day

The End of Day feature allows the user to view the end of day report and to perform the end of day for a selected date. Performing the end of day finalizes and closes out the selected business day; therefore, you must make sure that all customer orders have been settled or transferred to the following business day, all cash drawers and server banks have been closed and reconciled, and all EDC transactions have been completed before you perform the end of day. Once the end of day has been performed, you cannot go back and make any further changes to the business day.

Click the *End of Day* button to reveal the end of day options (See Figure 39-43).

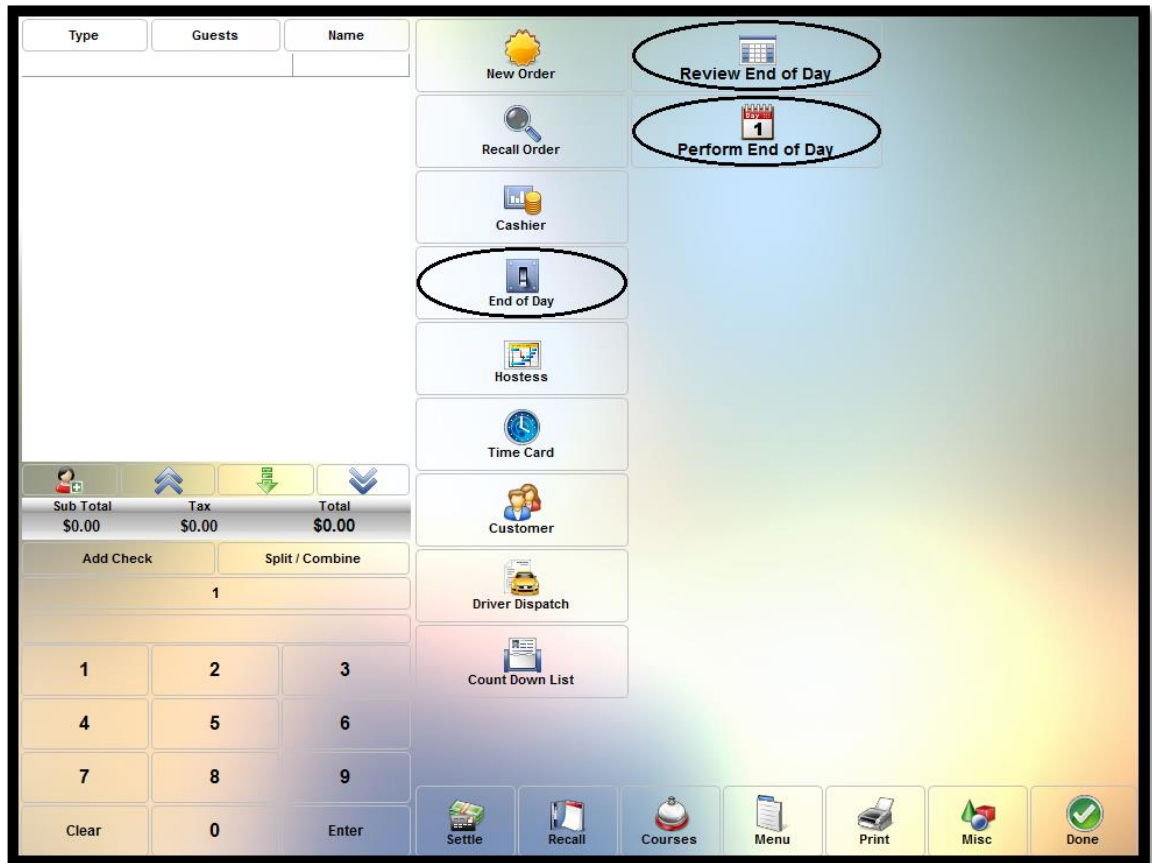


Figure 39-43

REVIEW END OF DAY

To generate and review the end of day report, click the *Review End of Day* button. This action displays the Select 'End of Day' Report Date window. Select the desired month, day of the month, and year by using the appropriate *up arrow* and *down arrow* buttons.

Once the desired date is selected, click the *OK* button (See Figure 39-44).

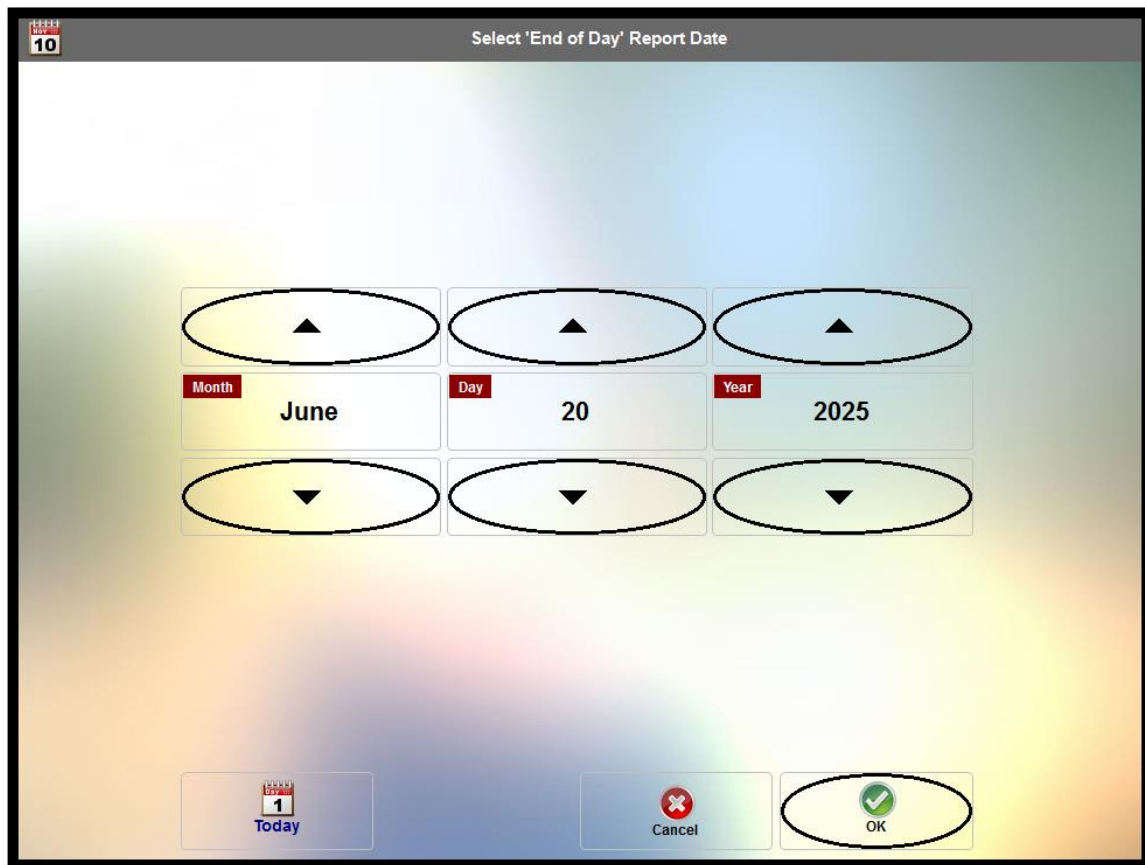


Figure 39-44

The End of Day report preview is generated and displays on the screen. If the length of the report exceeds the limits of the screen, use the *up arrow* and *down arrow* buttons on the right side of the screen to scroll through it. To print a copy of the report, click the *Print* button on the right side of the screen.

When you have finished reviewing the report, click the *OK* button to return to the previous screen (See Figure 39-45).

End of Day Report

Business Date: 06-20

***** PREVIEW *****

SALES SUMMARY

Beverages Net Sales	\$294.60
Food Net Sales	\$1,982.75
<hr style="border-top: 1px dashed black;"/>	
Gross Sales Total	\$2,172.35
<hr style="border-top: 1px dashed black;"/>	
Surcharges Total	\$105.00
<hr style="border-top: 1px dashed black;"/>	
Net Sales Total	\$2,277.35
<hr style="border-top: 1px dashed black;"/>	
Sales Tax Collected	\$160.12
Taxable Sub Total: \$2,172.35	
Non Taxable/Exempt: \$105.00	
<hr style="border-top: 1px dashed black;"/>	
Total Taxes Collected	\$160.12
<hr style="border-top: 1px dashed black;"/>	
Gross Sales Total	\$2,437.47
<hr style="border-top: 1px dashed black;"/>	
Order Gratuities Collected	\$555.96
Visa Tips Added	\$12.50
Master Card Tips Added	\$5.00
<hr style="border-top: 1px dashed black;"/>	
Total Gratuities Collected	\$573.46
<hr style="border-top: 1px dashed black;"/>	
End of Day Total	\$3,010.93

Figure 39-45

PERFORM END OF DAY

To perform the end of day, click the *Perform End of Day* button. This action displays the Performing End of Day window. To perform the end of day for the default date, click the *Perform End of Day for 'yyyy-mm-dd'* button (where “yyyy-mm-dd” is the date of the most recent business day [See Figure 39-46]).

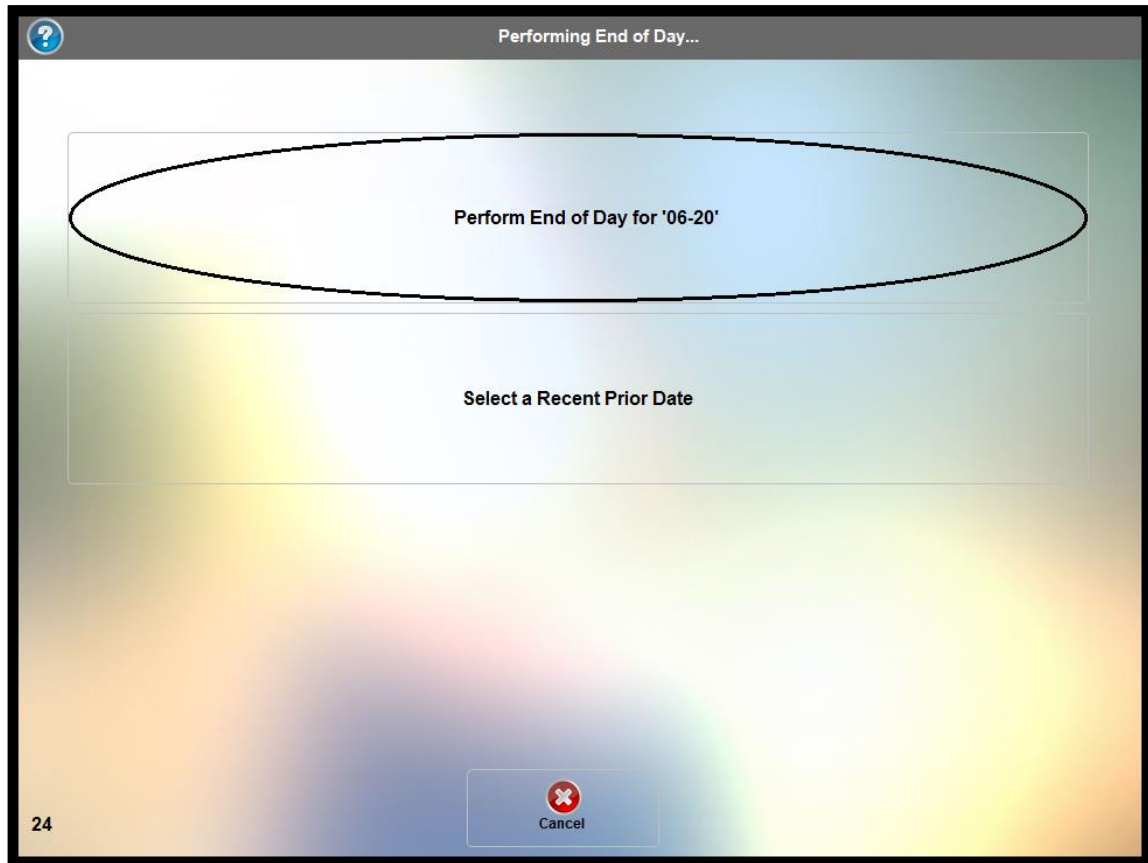


Figure 39-46

To perform the end of day for a date prior to the most recent business day, click the *Select a Recent Prior Date* button. On the following screen, select the desired month, day of the month, and year by using the appropriate *up arrow* and *down arrow* buttons.

Once the desired date is selected, click the *OK* button (See Figure 39-47).

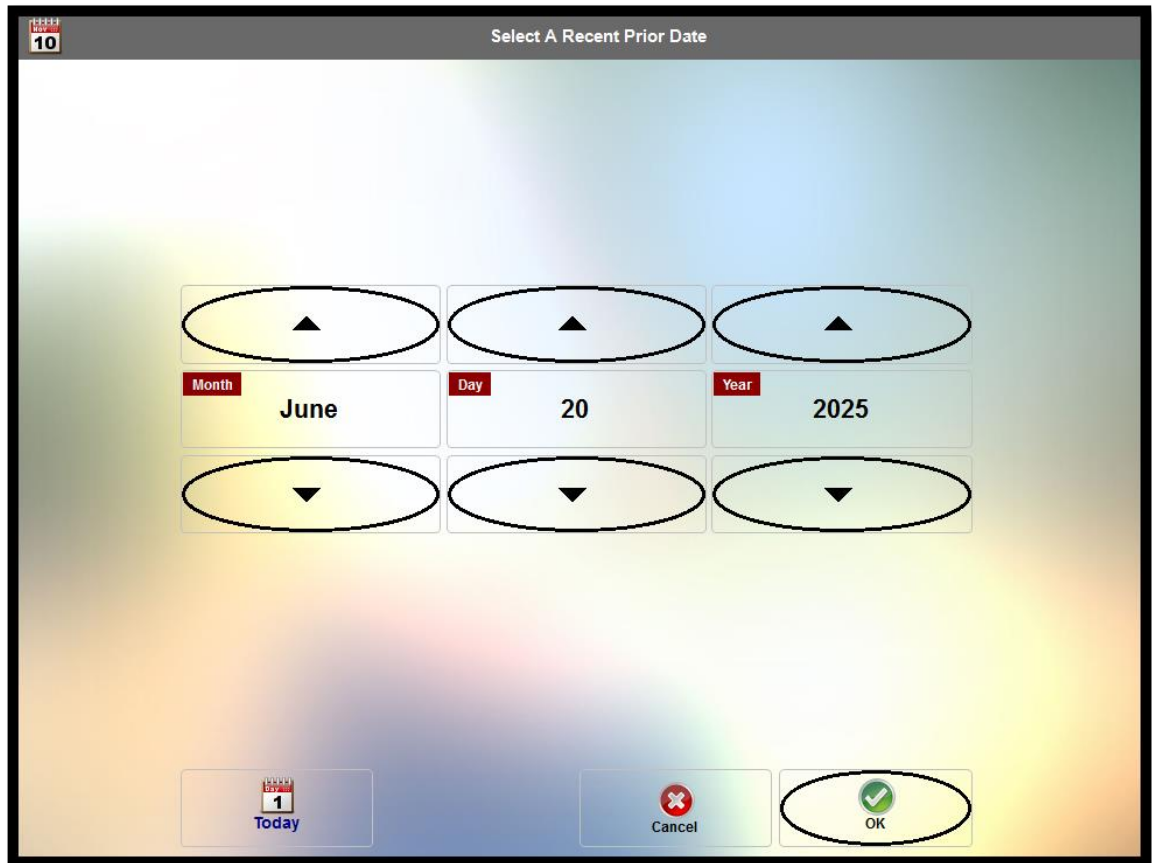


Figure 39-47

The Performing End of Day progress window displays. When it closes, the end of day procedure is complete.

When the end of day close procedure is complete, the final End of Day Report displays. If the length of the report exceeds the limits of the screen, use the *up arrow* and *down arrow* buttons on the right side of the screen to scroll through it. To print a copy of the report, click the *Print* button on the right side of the screen.

When you finish reviewing the report, click the *OK* button to return to the previous screen (See Figure 39-48).

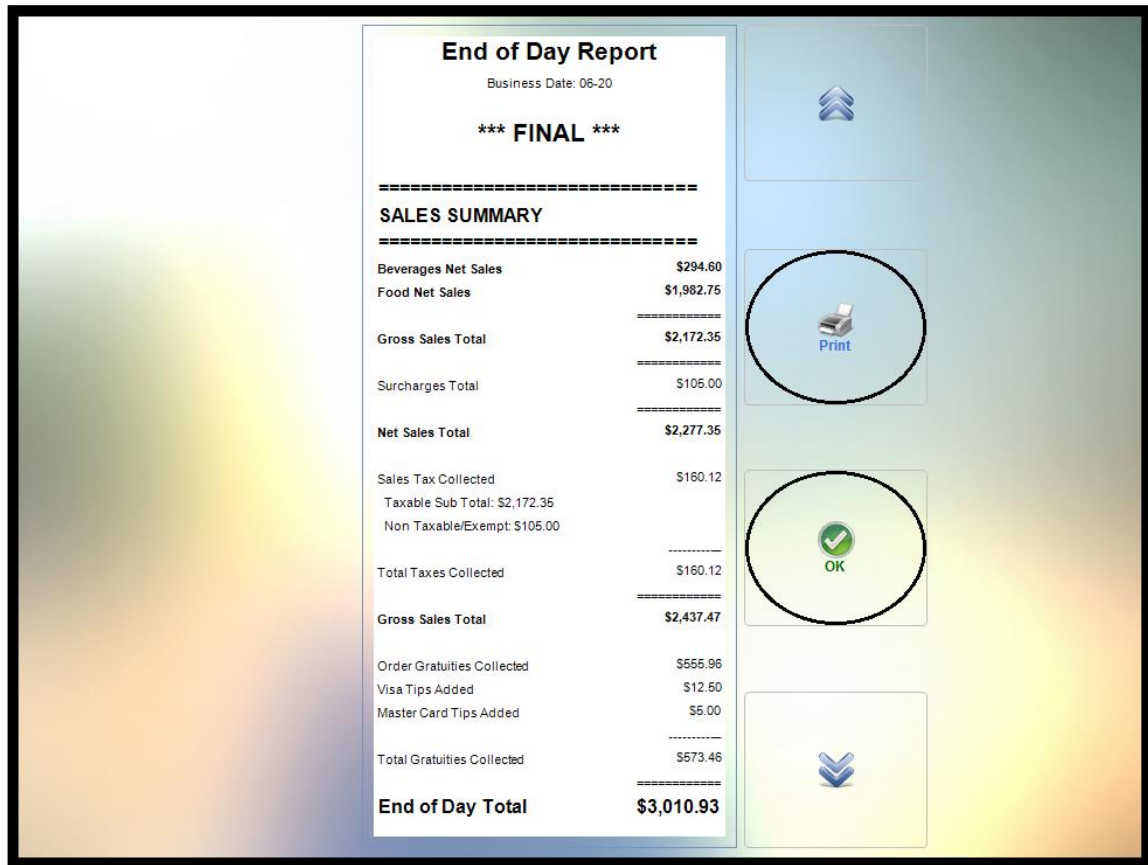


Figure 39-48

Hostess

The Hostess feature allows you to create a diagram in the XERA® POS Manager application that approximates the table layout of your restaurant and then assign your guests to these various tables in XERA® POS. These tables show as occupied on this diagram while your guests are dining. Once a guest party's check is settled, their table reverts to unoccupied status.

The Hostess feature may only be used with Dine In type service. To set an order type to Dine In type service, open the XERA® POS Manager application and navigate to **Company Tab > Operations > Order Types**. Select the desired order type from the List Tab, click on the Main Tab, and then click on the Settings Tab. Next, select the *Is Dine In Service* and the *Show Visual Floor Plan* checkboxes. Click the *Save* and *Done* buttons to save your changes and exit the Order Types screen.

Next, navigate to **Company Tab > Settings > Terminal Settings**. Under the List Tab, double-click on your desired terminal to open it under the Main Tab. Click the *Settings* Tab and then

expand the *Hostess Settings* group by double-clicking on it. Click on the *Default Floor Plan Seating Option* on the left side of the screen and then select *Main Dining Room* from the dropdown list on the right side of the screen by clicking on it. This makes the Main Dining Room Table diagram the default table diagram when a new dine in order is entered. Finally, open XERA® POS and refresh your settings.

Now when you create a new order of this type in XERA® POS, upon selecting the dine in order type, the visual floor plan diagram displays and you are required to select a table for the guest party before entering the guest orders. Select the desired table by clicking on it in the diagram (See Figure 39-49).

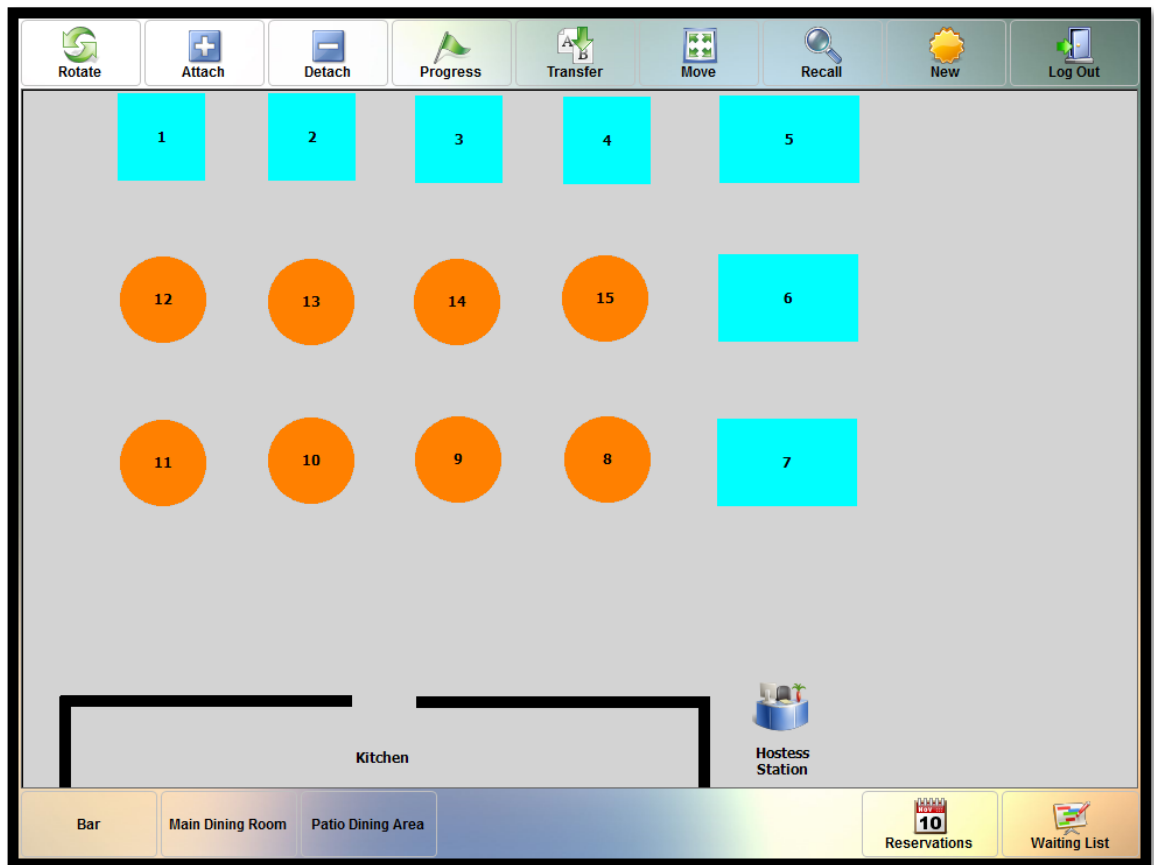


Figure 39-49

Once the table is selected, the menu selection screen displays. Enter the guests' orders as usual. In addition to the menu items ordered, the smart check displays the table number that was selected in the step above (See Figure 39-50).

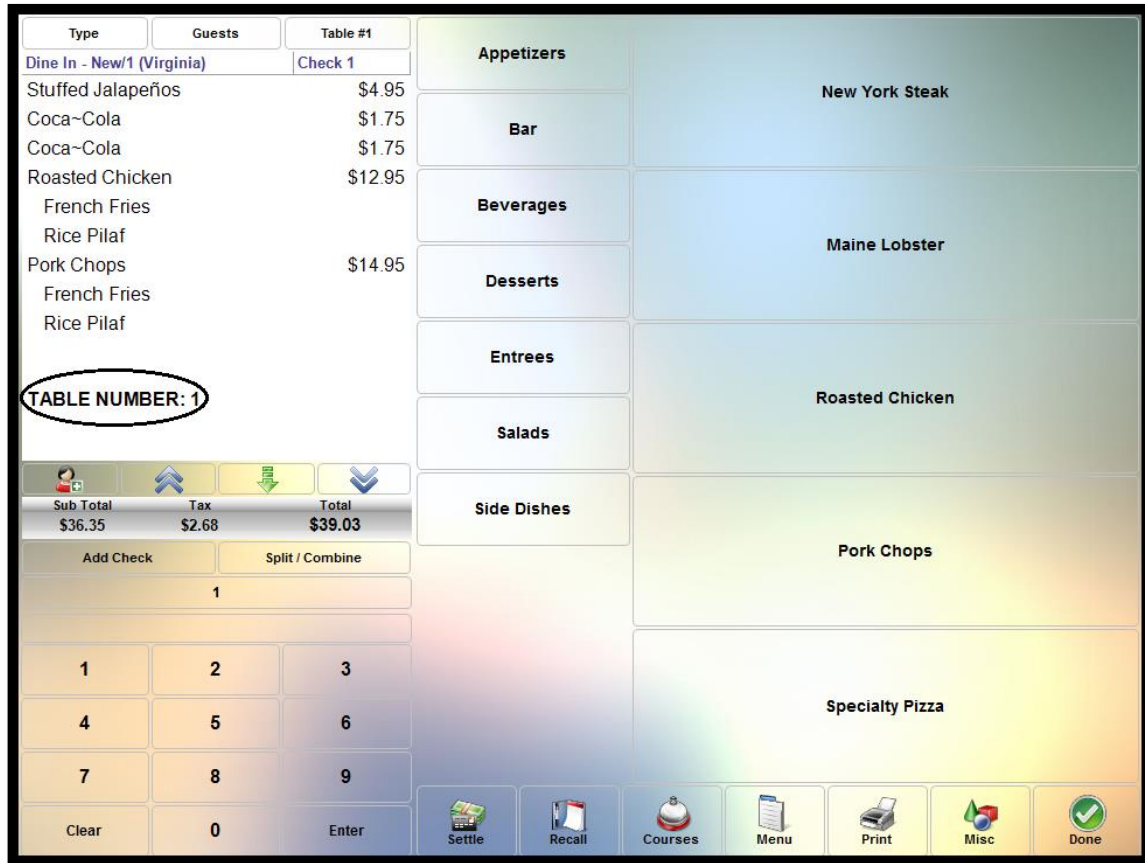
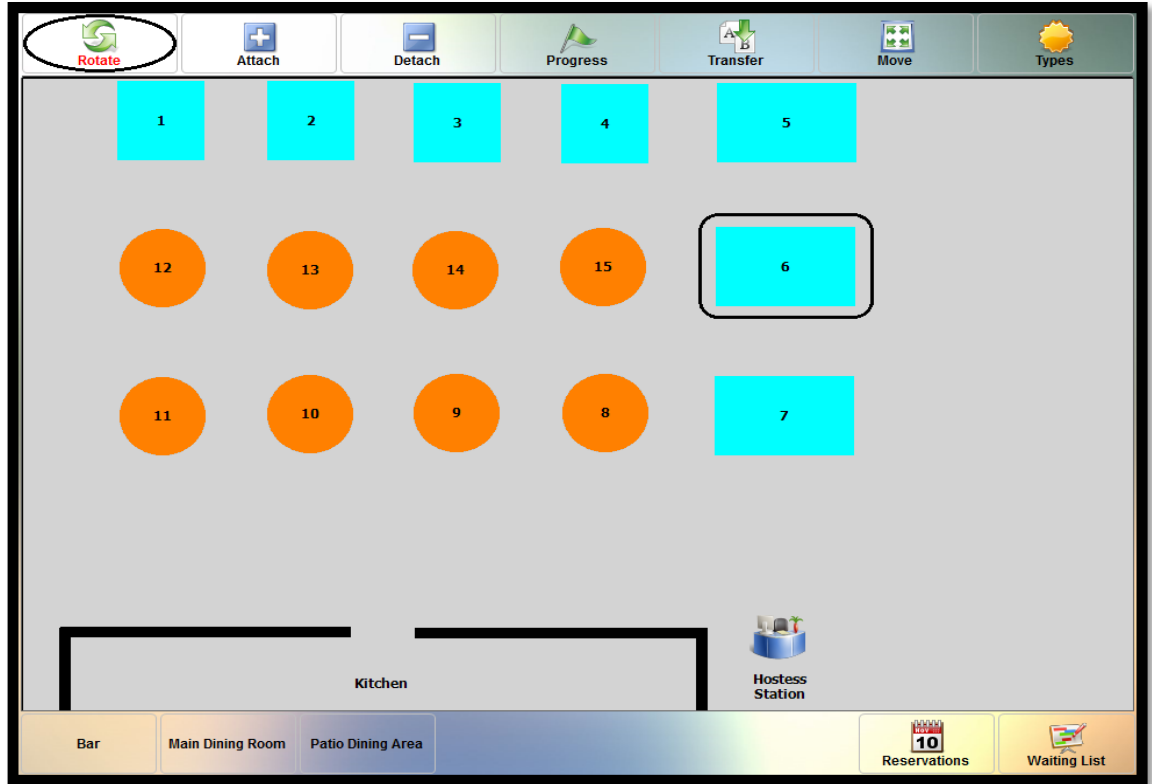


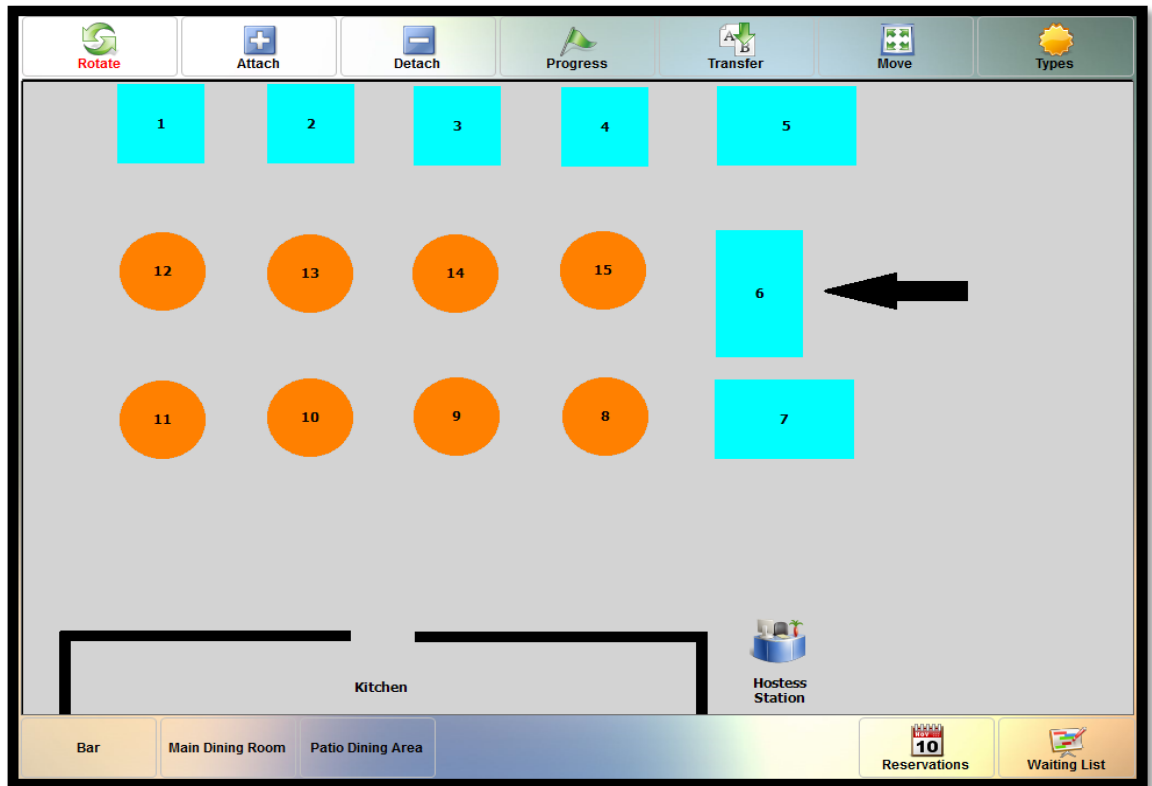
Figure 39-50

ROTATE

The Rotate feature of the visual floor plan allows the user to change the position of the tables on the screen. To use the feature, click the *Rotate* button and then click on the table in the diagram that you wish to rotate. Each click rotates the table image 90° (See Figure 39-51).



Before Table Rotation



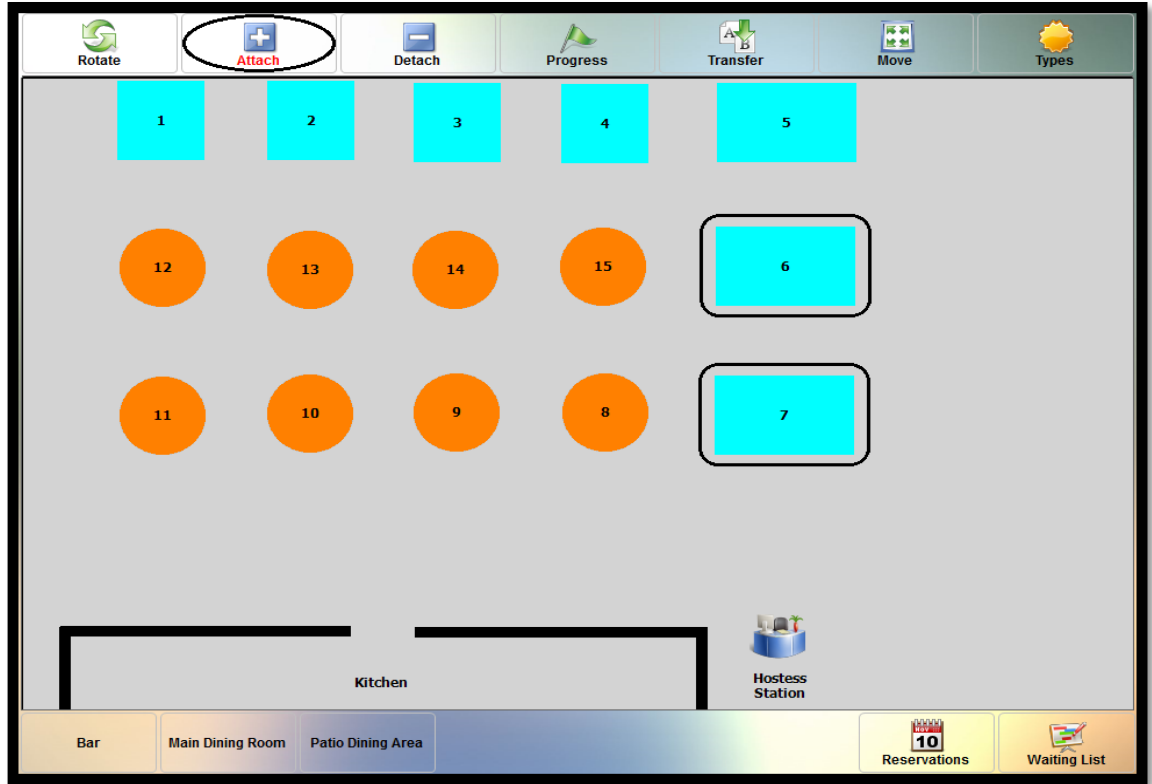
After Table Rotation

Figure 39-51

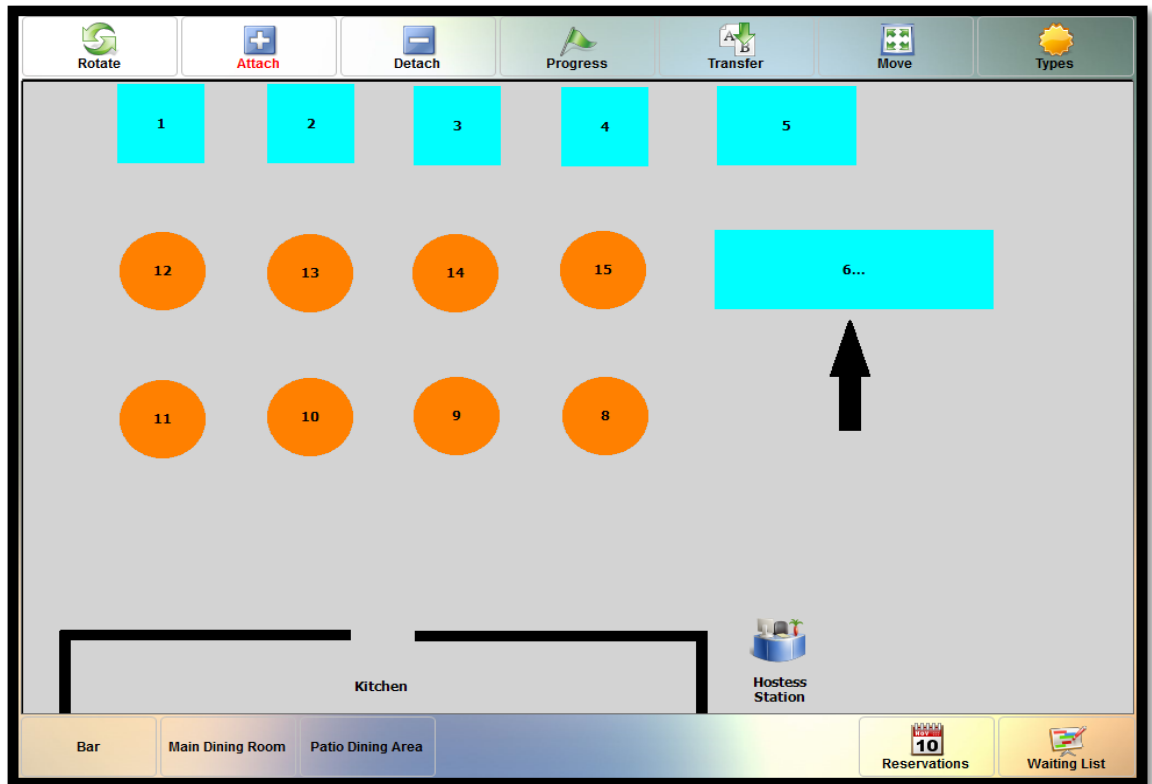
Please note that the Rotate feature has no visible effect on round or square tables in your visual floor plan diagram, as the horizontal and vertical dimensions are identical. Only non-symmetrical rectangular and oval shaped tables may be rotated.

ATTACH

The Attach feature of the visual floor plan allows the user to merge two or more tables together to create a single larger table. To use the feature, click the *Attach* button and then click on the two or more tables, in succession, that you wish to merge. As each additional table is selected after the first one, it is appended to the first table in the diagram to form a larger table. The ellipsis (...) after the table number in the diagram after the attachment indicates that the table consists of multiple tables merged together (See Figure 39-52).



Before Table Attachment



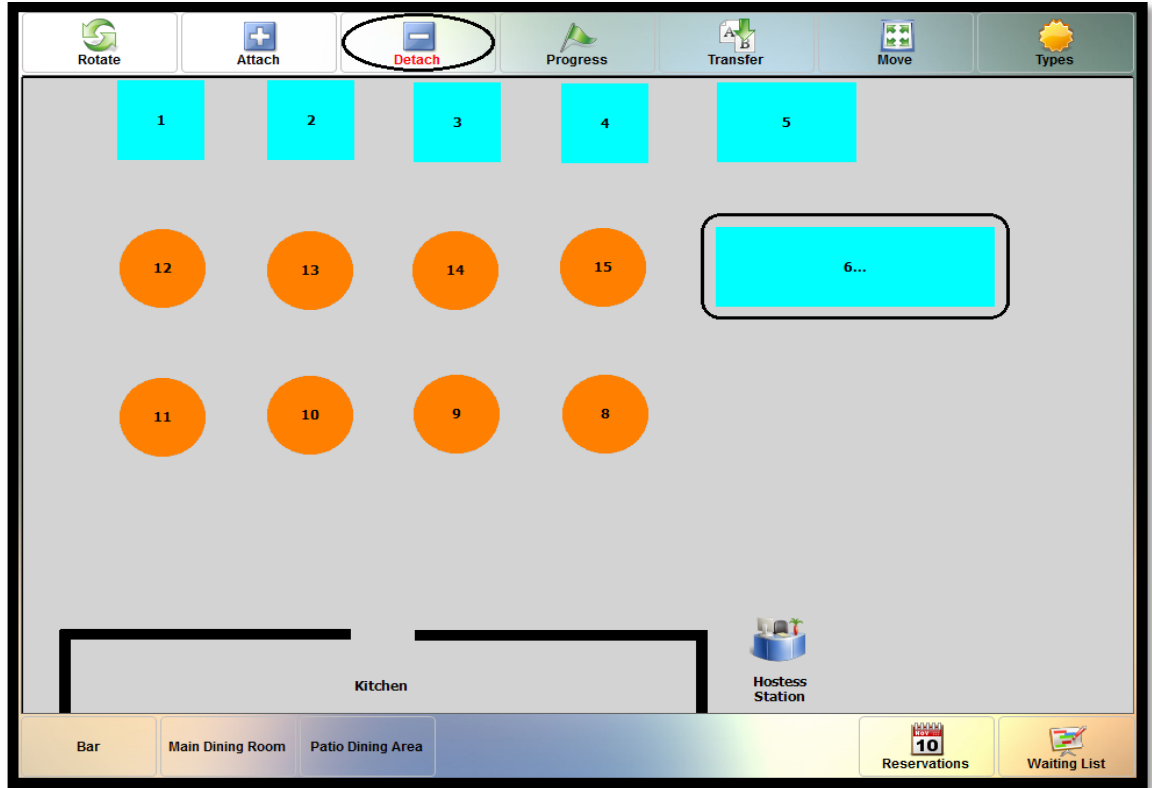
After Table Attachment

Figure 39-52

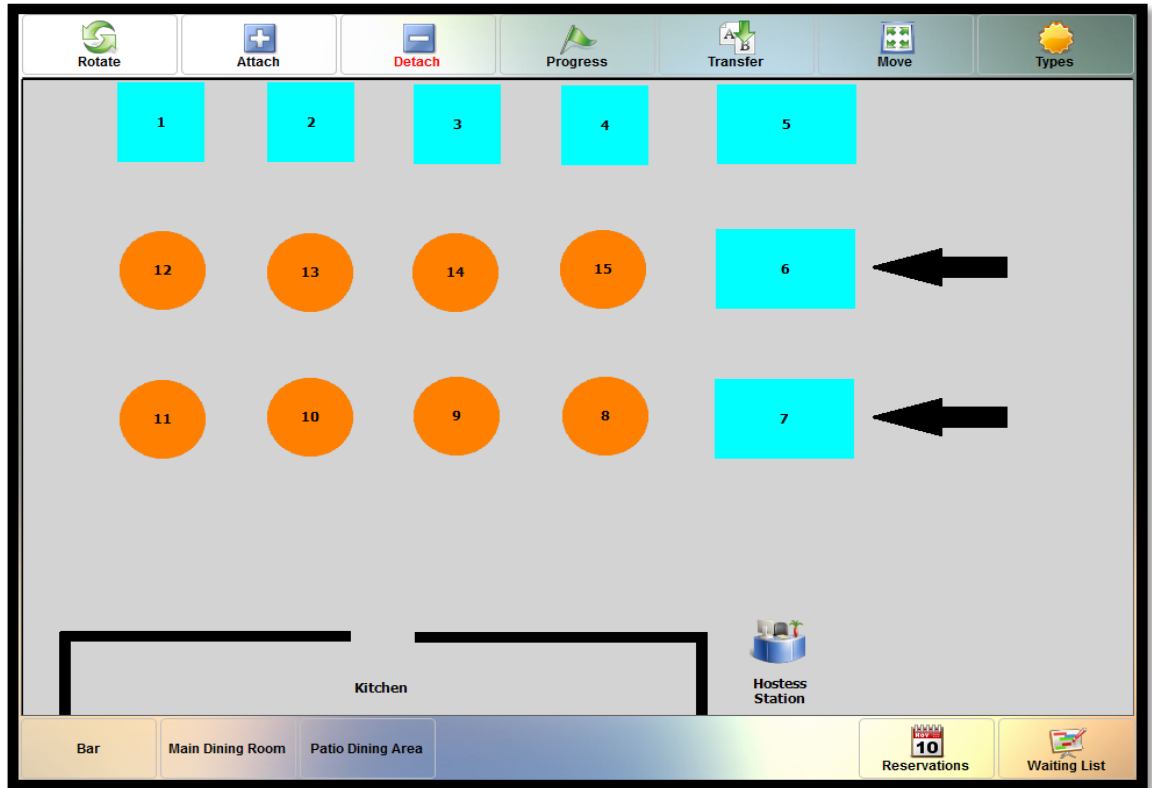
Please note that tables of various sizes and shapes may be attached in this manner. For example, it is not necessary to restrict the attachment of rectangular tables exclusively to other rectangular tables. Rectangular tables, square tables, and round tables may all be attached to each other.

DETACH

The Detach feature of the visual floor plan allows the user to reverse the attachment of two or more tables as described above. To use this feature, click the *Detach* button and then click on the merged table in the table diagram (the merged table displays an ellipsis [...] after the table number). The constituent tables of the merged table immediately return as individual tables to their former positions in the visual floor plan (See Figure 39-53).



Before Table Detachment



After Table Detachment

Figure 39-53

PROGRESS

The Progress feature allows the user to mark a guest party's table as to the progress of their dining experience.

To do so, click the *Progress* button and then click on an occupied table in the visual floor plan to display the Select Table Progress Status window. Select the guest party's current status from the available options by clicking on the appropriate button (See Figure 39-54).

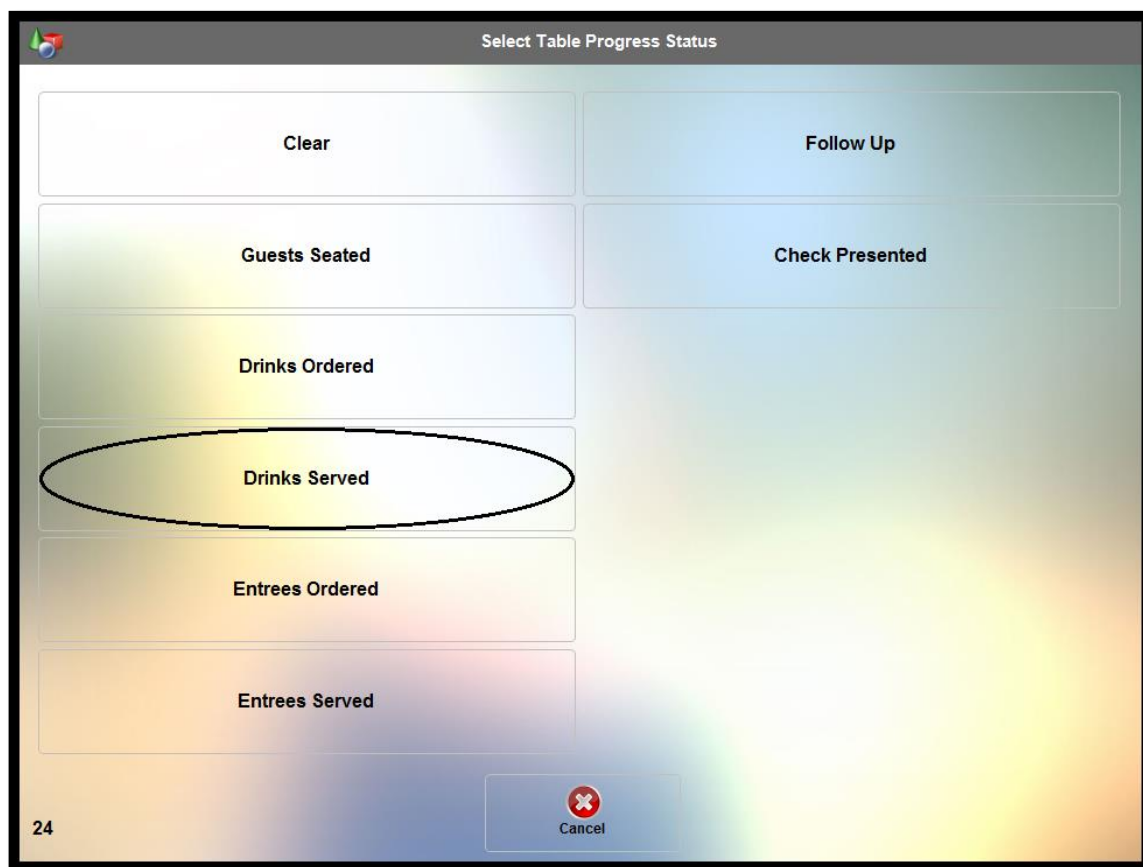


Figure 39-54

Once selected, the guest party's seating status appears on their table icon in the visual floor plan diagram. This seating status begins to flash upon the expiration of the trigger alert minutes that have been set for this seating status, indicating that the guest party's next seating status update is overdue (See Figure 39-55).

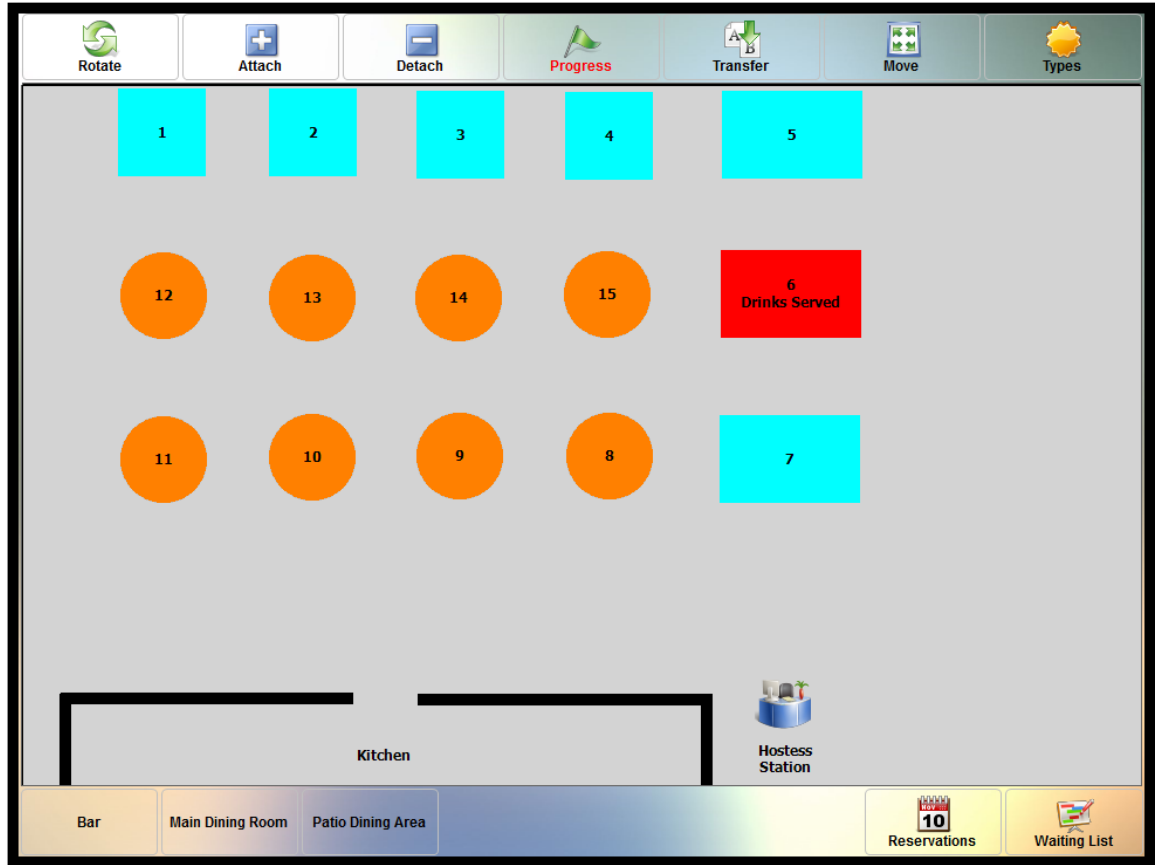
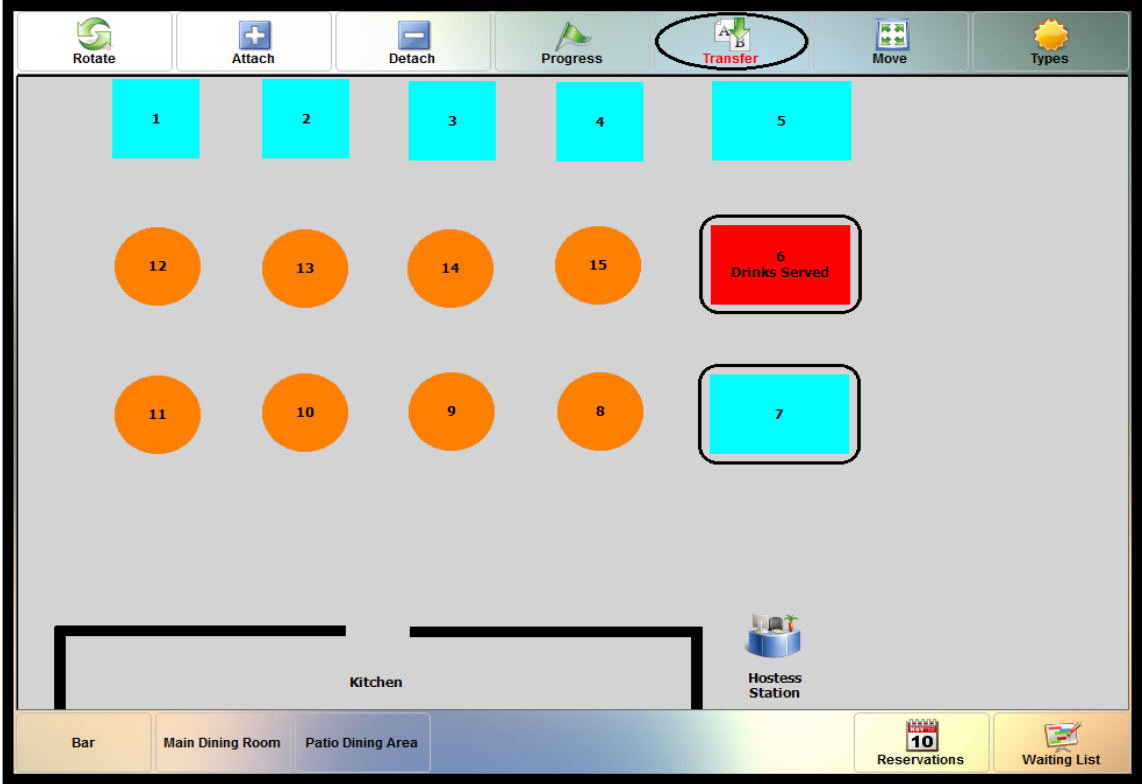


Figure 39-55

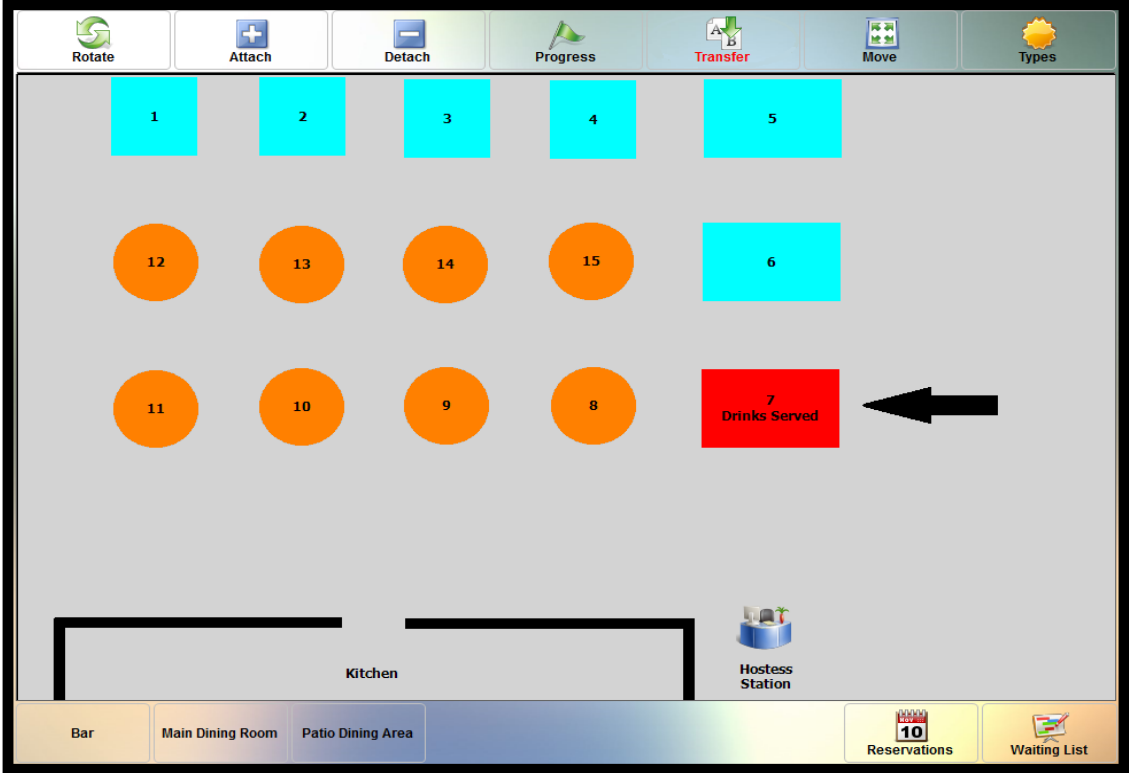
Seating statuses and trigger alert minutes are user defined. Seating statuses may be created and trigger alert minutes may be set in the XERA® POS Manager application by navigating to **Seating Tab > Floor Plans > Seating Statuses**, and then selecting the *New* button.

TRANSFER

The Transfer feature of the visual floor plan allows the user to move a guest party's guest check from one table to another. To use the feature, select the *Transfer* button and then click on the table that holds the guest check that you wish to move. Next, click on the table to which you wish to move it. XERA® POS automatically moves the guest check from the source table to the destination table. (See Figure 39-56).



Before Transfer

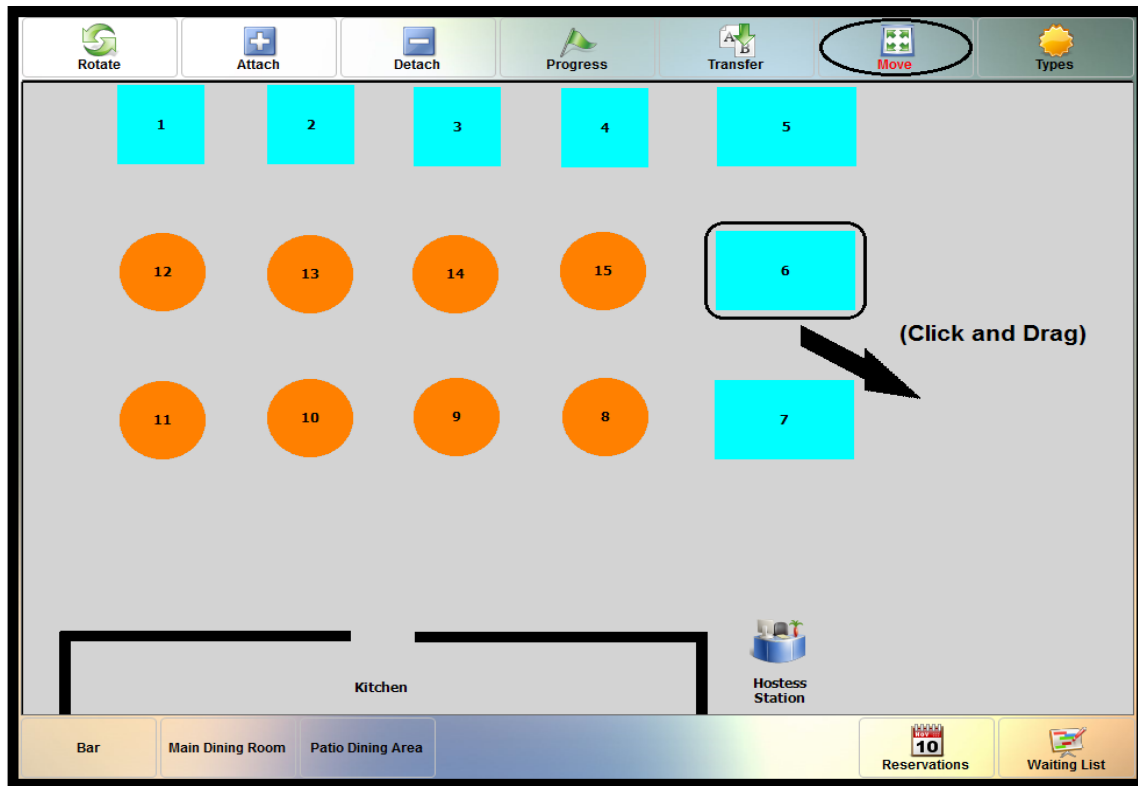


After Transfer

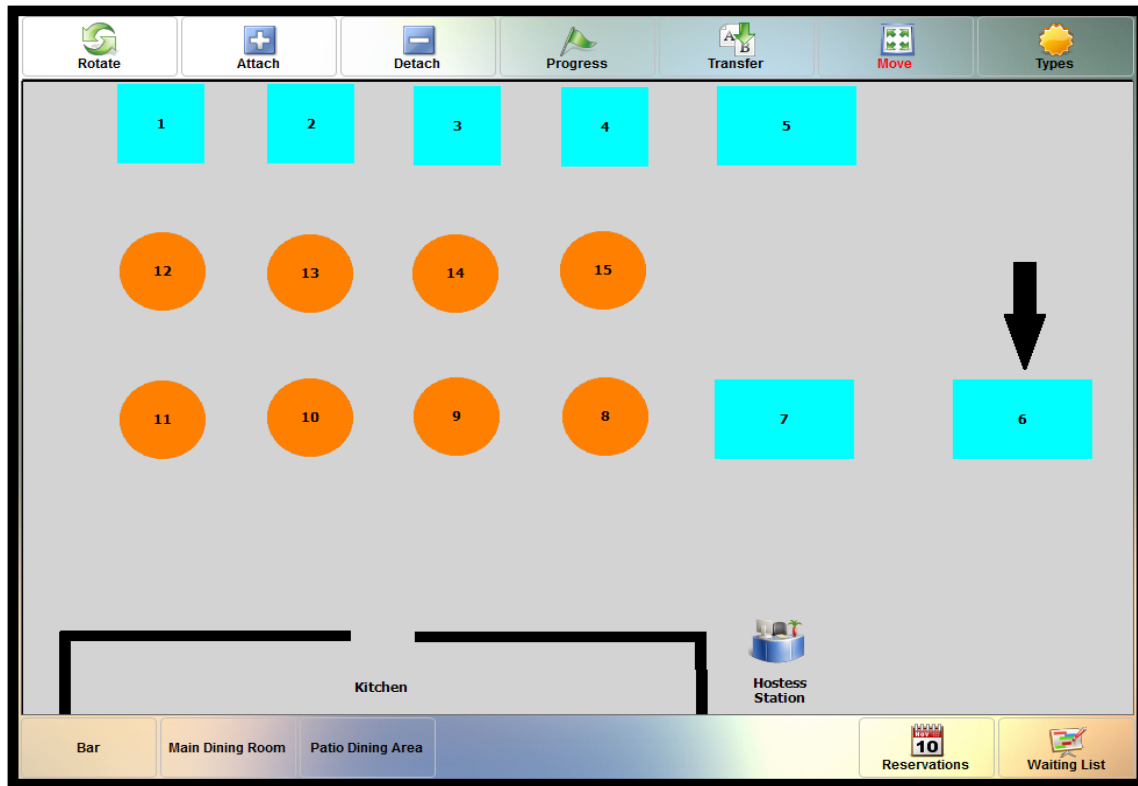
Figure 39-56

MOVE

The Move feature allows the user to move tables in the visual floor plan diagram from one location to another. To do so, click the *Move* button and then click on and drag the desired table to its new location in the diagram (See Figure 39-57).



Before Move



After Move

Figure 39-57

TYPES

The Types feature of the visual floor plan allows the user to select a different order type, if necessary. Click the *Types* button to display the Order Type Selection screen. Select the desired order type by clicking on the appropriate button. After selecting the order type, continue with the order as you normally would.

Time Card

The Time Card feature of XERA® POS allows the users of the system to clock in and out for their work shifts.

To begin a work shift, log into XERA® POS and then navigate to **Misc > Time Card** to display the Clock In screen. In the upper left corner, the Clock In screen displays the name of the employee who is currently logged in to the system. In the upper right corner, the screen displays the current time clock date and time (See Figure 39-58).

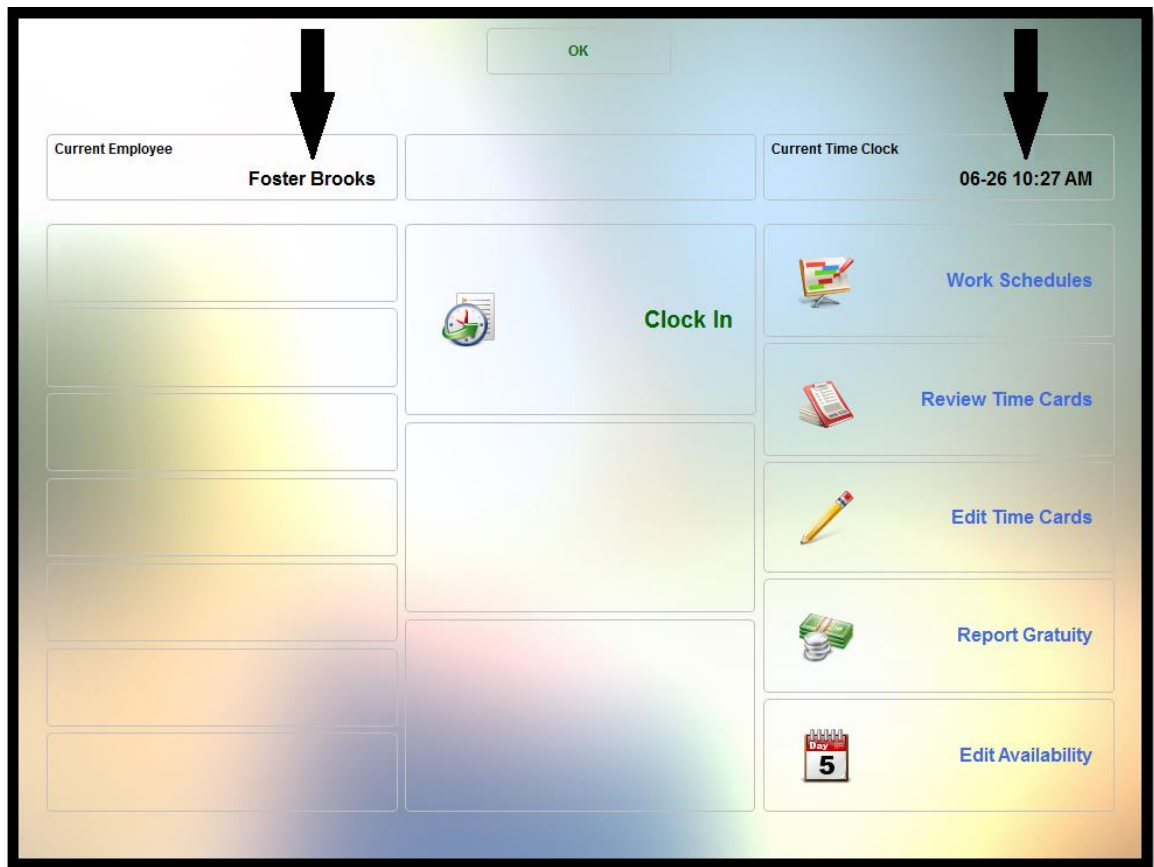


Figure 39-58

CLOCK IN

When you are ready to clock in for your work shift, click the *Clock In* button. A clock in successful message displays and the clock in time is recorded in the system. The employee's clock in time displays in the left column of the screen and the job title that the employee is clocked in as displays beneath the *OK* button at the top of the screen (See Figure 39-59).

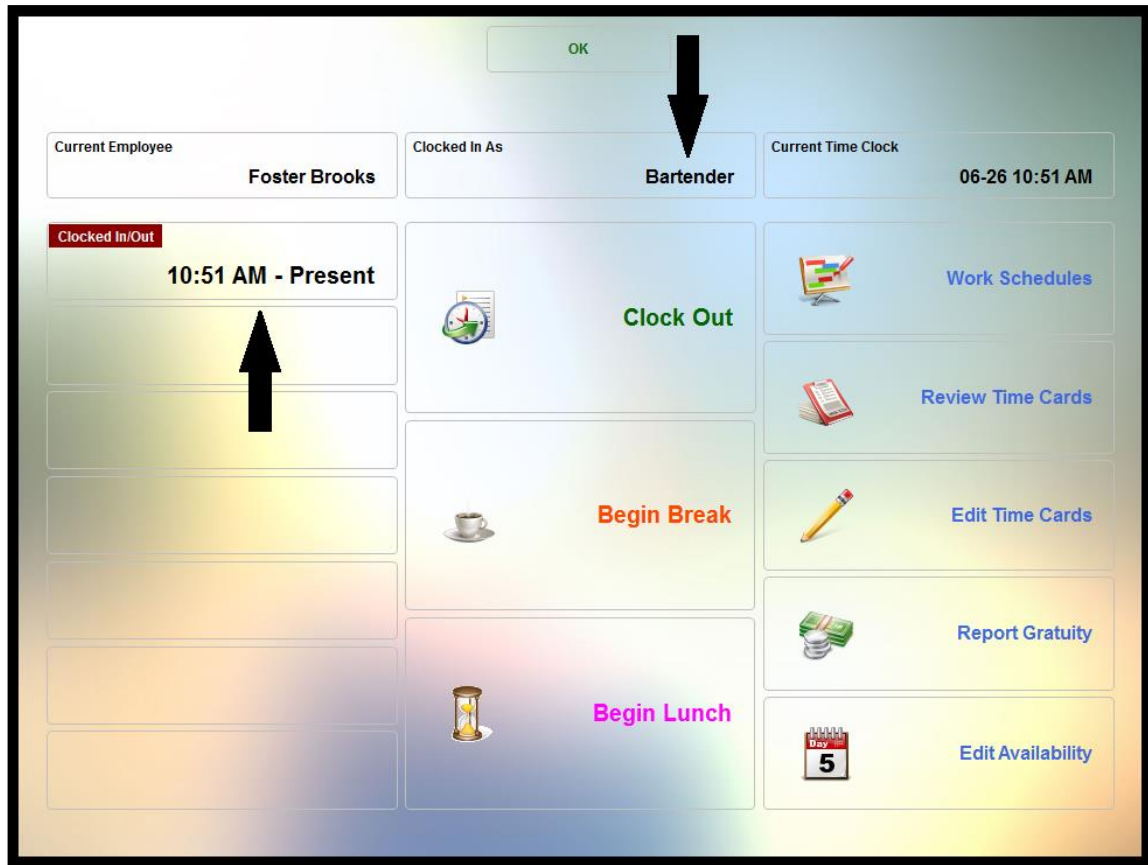


Figure 39-59

BEGIN BREAK

When you are ready to clock out for your work break, click the *Begin Break* button. A begin break successful message displays and the break clock out time is recorded in the system. The employee's break clock out time displays in the left column of the screen.

END BREAK

When you are ready to clock in from your work break, click the *End Break* button. An end break successful message displays and the break clock in time is recorded in the system. The employee's break time range displays in the left column of the screen.

BEGIN LUNCH

When you are ready to clock out for your lunch period, click the *Begin Lunch* button. A begin lunch successful message displays and the lunch period clock out time is recorded in the system. The employee's lunch period clock out time displays in the left column of the screen.

END LUNCH

When you are ready to clock in from your lunch period, click the *End Lunch* button. An end lunch successful message displays and the lunch period clock in time is recorded in the system. The employee's lunch period time range displays in the left column of the screen.

CLOCK OUT

When you are ready to clock out at the end of your work shift, click the *Clock Out* button. A clock out successful message displays and the clock out time is recorded in the system. The employee's entire work shift period displays in the left column of the screen.

Please note that the employee is prevented from clocking out if the Clock Out Requires Employee's Open Orders Closed or Transferred option is selected and/or the Clock Out Requires Employee's Open Cashiers Closed option is selected and these conditions have not been satisfied. These two settings may be found in the XERA® POS Manager application by navigating to **Company Tab > Settings > Store Settings > Workforce Management Settings**. When these settings are selected and the employee has any outstanding customer orders that have not yet been settled and/or if there is a cash drawer or server bank that is not closed, then the employee must transfer his outstanding orders to another server and/or the cash drawer or server bank must be closed before the system allows him to clock out from his work shift.

WORK SCHEDULES

Click the *Work Schedules* button to display the Work Schedules screen. The work schedule displays for the employee who is currently logged into the system.

To display the work schedule for a different employee, select the button on the left side of the screen that corresponds with the desired employee. Use the *up arrow* and *down arrow* buttons to scroll the screen up or down so that any hidden portions of the schedule may be viewed. If

desired, click the *Print* button to print a hard copy of the schedule. Click the *OK* button to return to the previous screen.

REVIEW TIME CARDS

Click the *Review Time Cards* button to display the Review Time Cards screen. Select the pay period begin date and the pay period end date from the date picker controls that display. The time cards for the selected date range display for the employee who is currently logged into the system.

To display the time cards for a different employee, select the button on the left side of the screen that corresponds with the desired employee. Use the *up arrow* and *down arrow* buttons to scroll the screen up or down so that any hidden portions of the time card may be viewed. If desired, click the *Print* button to print a hard copy of the time card. Click the *OK* button to return to the previous screen.

EDIT TIME CARDS

The Edit Time Cards feature allows the employee to view and correct any errors that may have occurred in the proper recording of his clock in and clock out times.

Time Cards

Click the *Time Cards* button while in the Edit Time Cards screen to return to the display of the time cards for the currently selected pay period.

Time Exceptions

Click the *Time Exceptions* button to display the clock in and clock out times for the selected employee. If any of the employee's break, lunch, or work shift times recorded in the system exceed the time periods allotted, a time card exception occurs.

A time card exception appears as a normal clock in time, but without the approval displayed in the upper left corner of the button. Depending on the employee's reason for the time exception, the manager, at his discretion, approves the time exception or refuses to approve the time exception. The manager may adjust the employee's break, lunch, or work shift times as necessary to correct the time error before giving his approval.

Add Time Card

Click the *Add Time Card* button to create an additional time card for an employee to reimburse the employee for non-standard pay hours, such as personal time, vacation time, sick time, holiday pay, or for missed work break and lunch period reimbursements. Select the appropriate time card type by clicking on its corresponding button on the left side of the Select Time Card Type screen.

Next, select the beginning and ending time card dates and times from the date and time picker controls that display. Click the *OK* button on the Time Picker screen to add the new time card to the employee's time cards for the selected pay period.

Review Time Cards

Click the *Review Time Cards* button to display the Review Time Cards screen. Select the pay period begin date and the pay period end date from the date picker controls that display. The time cards for the selected date range display for the employee who is currently logged into the system. To display the time cards for a different employee, select the button on the left side of the screen that corresponds with the desired employee. Use the *up arrow* and *down arrow* buttons to scroll the screen up or down so that any hidden portions of the time cards may be viewed. If desired, click the *Print* button to print a hard copy of the time cards. Click the *OK* button to return to the previous screen.

Pay Period From

To view the time cards for an employee for other than the pay period selected by default, click the *Pay Period From* button to adjust the beginning date of the desired pay period.

Pay Period To

To view the time cards for an employee for other than the pay period selected by default, click the *Pay Period To* button to adjust the ending date of the desired pay period.

OK

Click the *OK* button when finished making any necessary changes in the Edit Time Cards screen to return to the previous screen.

REPORT GRATUITY

The Report Gratuity feature allows the employee to report his gratuities received at the end of his work shift. Before clicking the *Clock Out* button, the employee must click the *Report*

Gratuity button. The Enter Gratuity Total to Report window displays. Here the employee enters the total amount of gratuities received during his work shift by way of the virtual keypad. As each digit is entered, it displays in the field above the virtual keypad.

When finished, click the *Enter* button (See Figure 39-60).

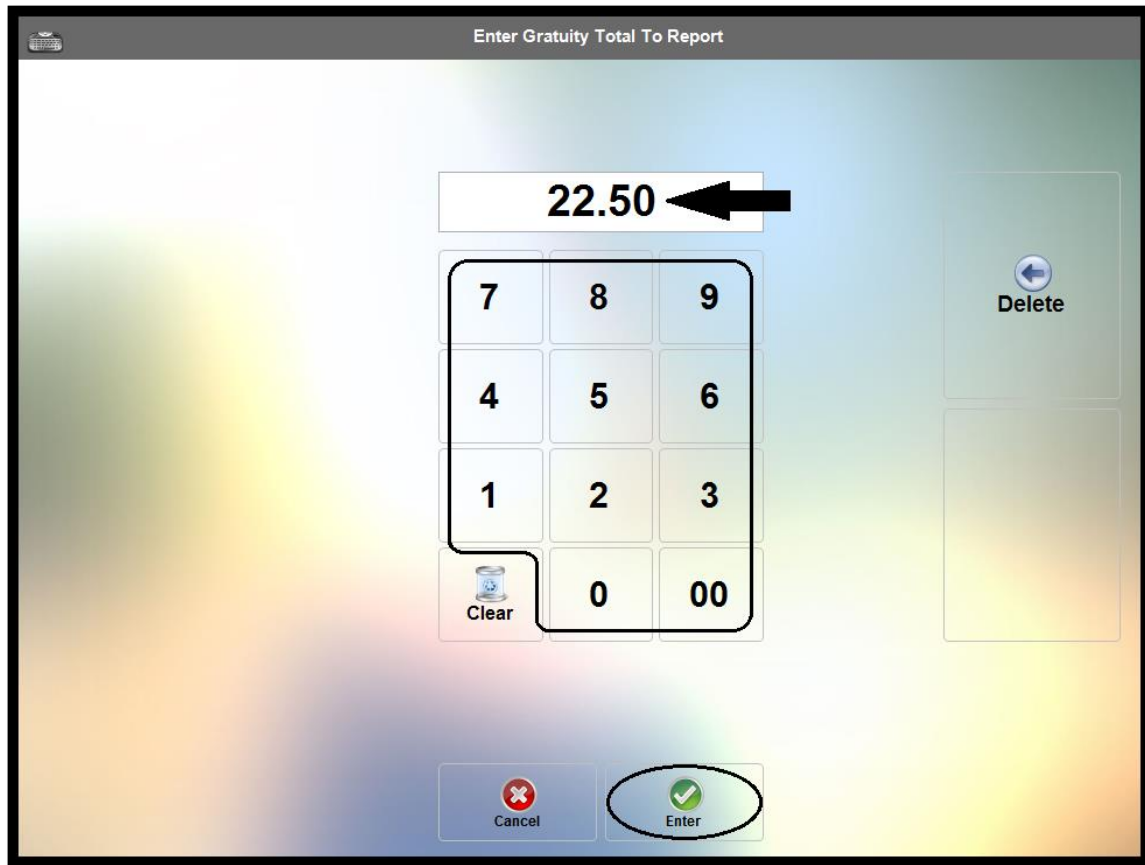


Figure 39-60

This amount is recorded and included in the employee's payroll as gratuities received. Please note that the Report Gratuity button does not appear on the screen unless the Enable Gratuity Reporting setting is set to "Yes" under the Workforce Management Settings in the XERA® POS Manager application, and there are gratuities to report.

EDIT AVAILABILITY

The Edit Availability feature allows the employee to enter the dates and times when he is available for work. When the manager creates the work schedule, the employee's name appears in the list of available employees only if he has indicated that he is available for work at the designated time. The employee's availability displays in the right column of the Edit Availability screen.

The employee availability may be filtered to display only promised availability, preferred availability, or all availability. The employee may create additional availability dates and times as necessary.

Click To Add Availability Entry

To enter additional availability dates and times, select the desired date range for this new availability by clicking the appropriate date range button (or the *Default* button). The Default option shows the employee available indefinitely at the same days and times for every week. Then select the *Click To Add Availability Entry* button at the top of the Edit Availability screen.

On the following screen, if you wish to add this new availability to the currently selected date range, click the *Use the Currently Selected Availability Begin and End Dates* button. To add this availability to a new date range, click the *Select New Availability Begin and End Dates* button. In this case, the user must enter the new date range by selecting the beginning and ending dates from the date picker controls that display.

Next, select the day of the week for which you wish to enter this availability by clicking on the appropriate day of week button and then choose your availability preference type by selecting the *Available*, *Preferred*, or *Promised* button. Each preference type holds a unique availability list. Finally, enter the time range for this new date availability by selecting the beginning and ending times from the time picker controls that display.

Please note that if you select a date range that is longer than one week and then choose a day of the week that spans multiple weeks, then the availability for that day of the week will show the employee as available at the same day and time for each week. Click the *OK* button when finished to save your new availability.

Customer

Reserved for future use.

Driver Dispatch

Reserved for future use.

Count Down List

The Count Down List feature allows the manager to enter the quantity of an individual menu item that is remaining in stock. Each time one of these menu items is ordered, the number remaining is decremented by one and this number displays on the face of the menu item's button on the Order Entry screen. In this way, the person entering the customer order can see how many units remain before the order is entered. If an insufficient quantity is available to meet the guest party's needs, the waitperson can notify the guests and allow them to make alternate selections.

To enter the countdown quantities for individual menu items, logon to XERA® POS, click the *Misc* button, and then select the *Count Down List* button.

ADD ITEM

Click the *Add Item* button to display the Count Down List Add Items screen. From this screen, you may select the method by which you may look up the menu items to add to the Count Down List, filter the list of menu items, review the recipe of any menu item displayed, and add the menu item to the Count Down List.

The first thing you must do is select the method by which you wish to look up the menu items you wish to add to the Count Down List. The default search method is “Lookup by Item Name,” as displayed on the face of the lookup method button in the upper left portion of the screen (See Figure 39-61).

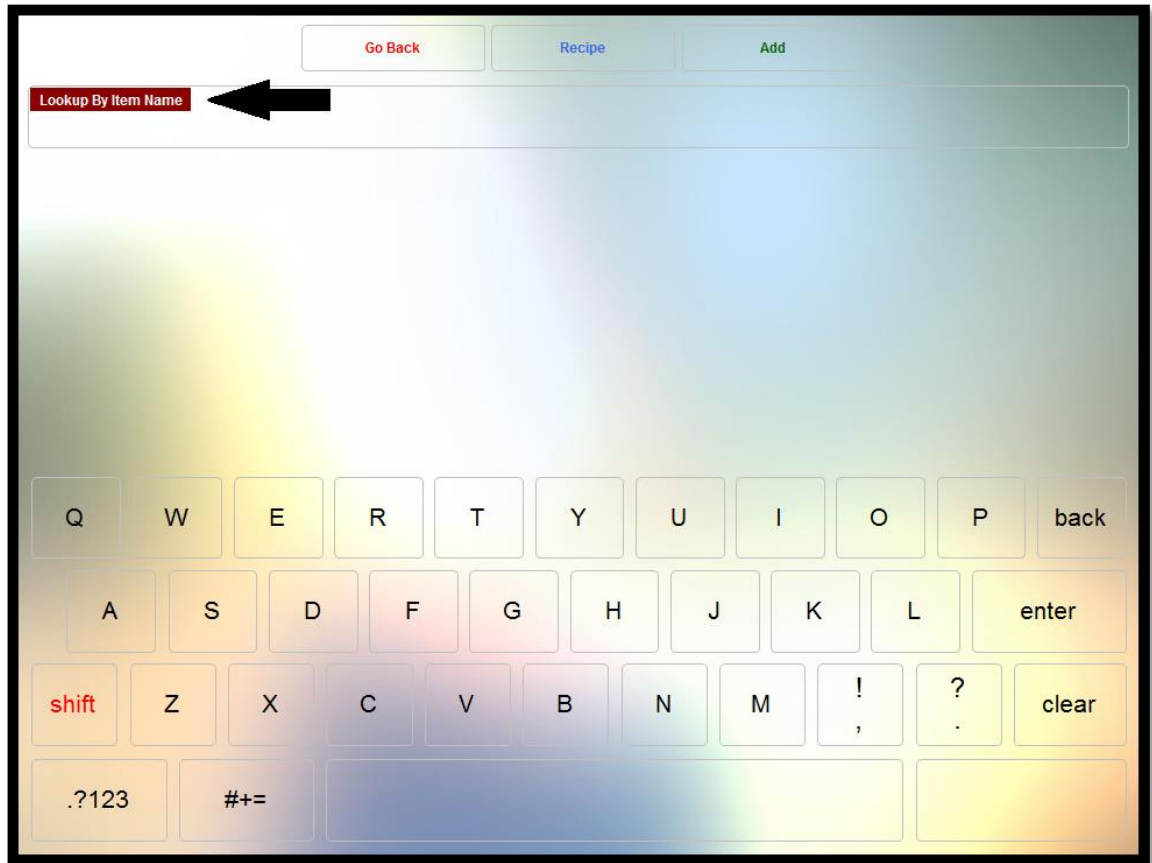


Figure 39-61

Lookup by Item Name

To lookup a menu item by the item name, click the *Lookup Method* button repeatedly until the caption on the button reads “Lookup by Item Name.” Next, enter the item name by using the virtual alpha keyboard at the bottom of the screen (if the numeric keyboard is displayed, click the *ABC* button to display the alpha keyboard).

As each character is entered, it appears on the *Lookup Method* button. At the same time, an incremental search is performed and a dynamic list of menu items whose names contain the character string entered thus far appears in the grid in the center portion of the screen. As each additional character is entered, the list is filtered further, reducing the number of menu items that contain the string of characters entered. As soon as your desired menu item appears in the list, click on it to select it. It is not necessary to continue entering characters if the menu item you are seeking is already displayed in the grid.

When finished, click the *Add* button (See Figure 39-62).

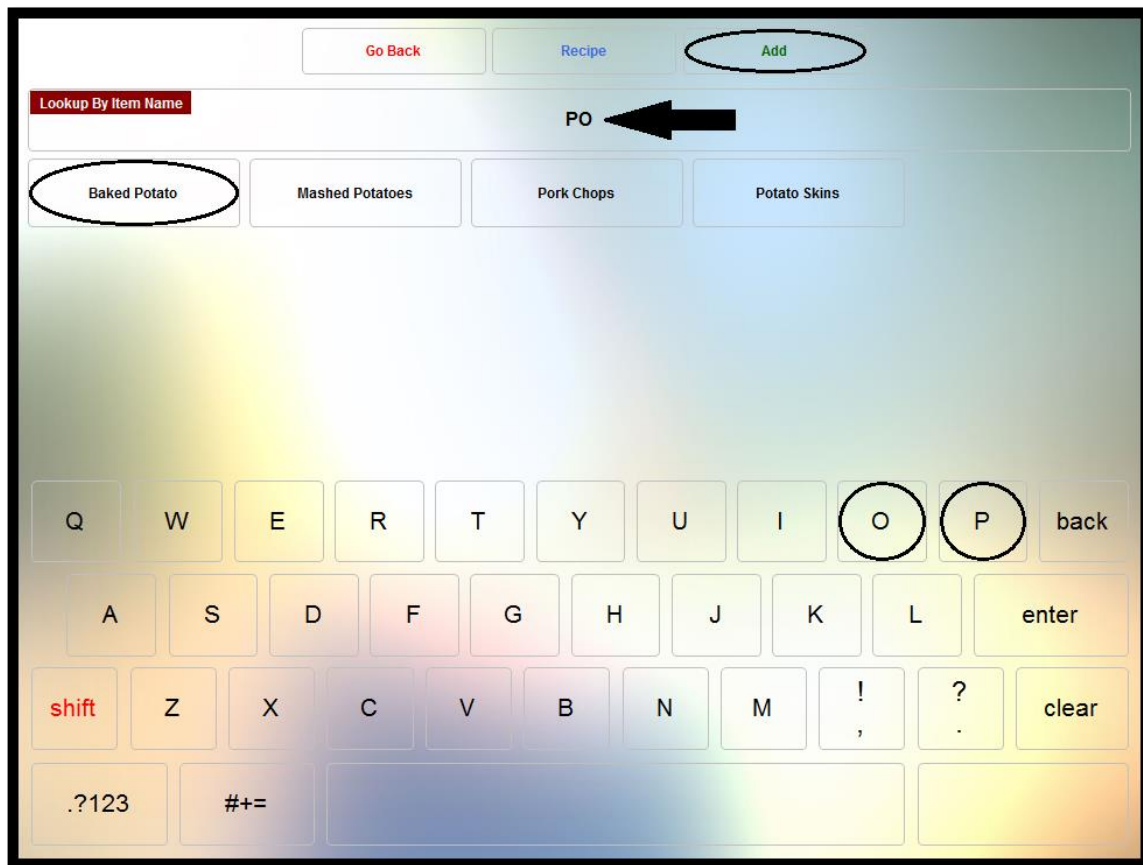


Figure 39-62

Next, the Enter Count Down Quantity window displays. Using the virtual keypad, enter the quantity of the selected menu item that is currently in stock. As this number is entered, it displays in the field directly above the virtual keypad.

When finished, click the *Enter* button to add the menu item to the Count Down List (See Figure 39-63).

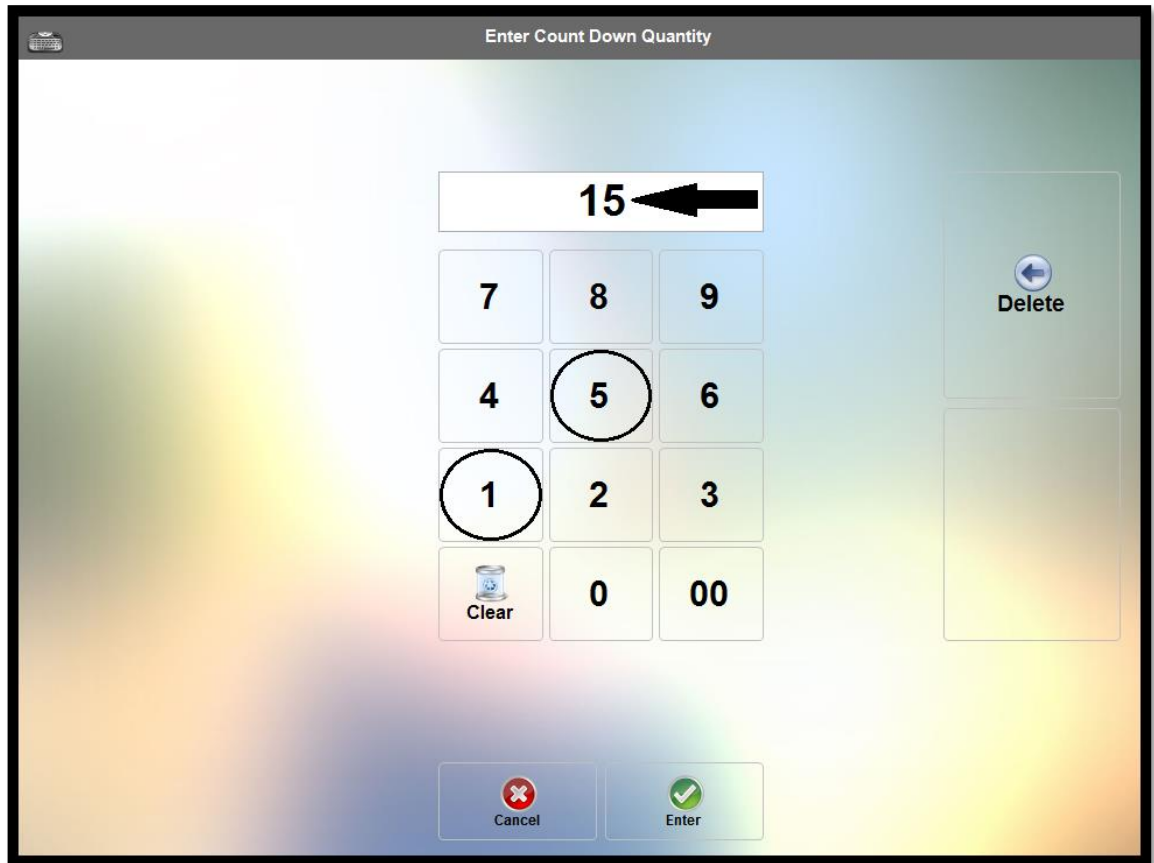


Figure 39-63

Recipe

After selecting the menu item from the grid on the left side of the screen, click the *Recipe* button if you wish to view the recipe information that was entered for the menu item in the XERA® POS Manager application.

Please note that if the optional recipe information has not been entered for the menu item, then nothing displays when this feature is selected.

Go Back

Click the *Go Back* button to exit the Count Down List Add Items screen without saving your changes.

Lookup by Item SKU

To lookup a menu item by the SKU number, click the lookup method button repeatedly until the caption on the button reads “Lookup by SKU.” Next, enter the SKU number by using the virtual numeric keypad at the bottom of the screen (if the alpha keyboard is displayed, click the .?123 button to display the numeric keyboard).

As each digit is entered, it appears on the lookup method button. At the same time, an incremental search is performed and a dynamic list of menu items whose SKU numbers contain the numeric character string entered thus far appears in the grid on the left side of the screen. As each additional digit is entered, the list is filtered further, reducing the number of menu items that contain the string of numeric characters entered. As soon as your desired menu item appears in the list, click on it to select it. It is not necessary to continue entering digits if the menu item you are seeking is already displayed in the grid.

When finished, click the *Add* button (See Figure 39-64).

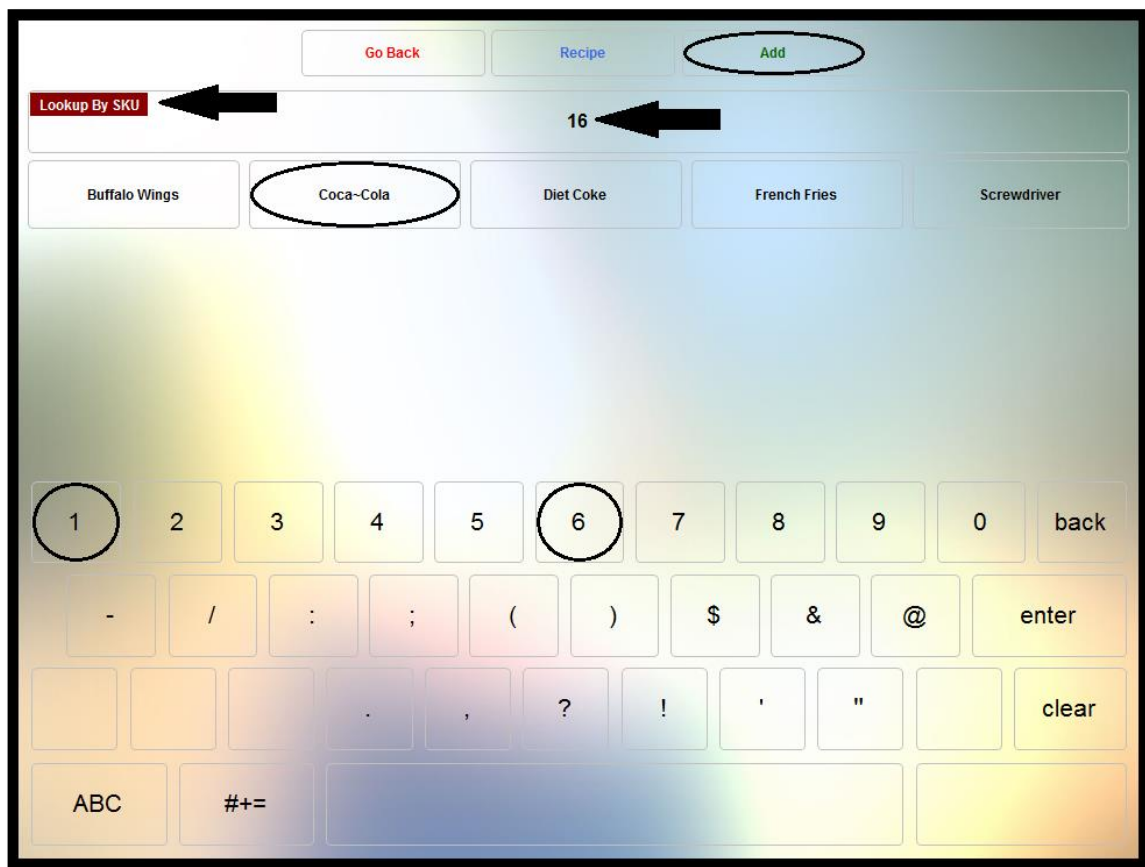


Figure 39-64

(Please note: SKU numbers must be assigned to each of your menu items in the XERA® POS Manager application, or else nothing displays when you search by SKU.)

Next, the Enter Count Down Quantity window displays. Using the virtual keypad, enter the quantity of the selected menu item that is currently in stock. As this number is entered, it displays in the field directly above the virtual keypad.

When finished, click the *Enter* button to add the menu item to the Count Down List (See Figure 39-65).

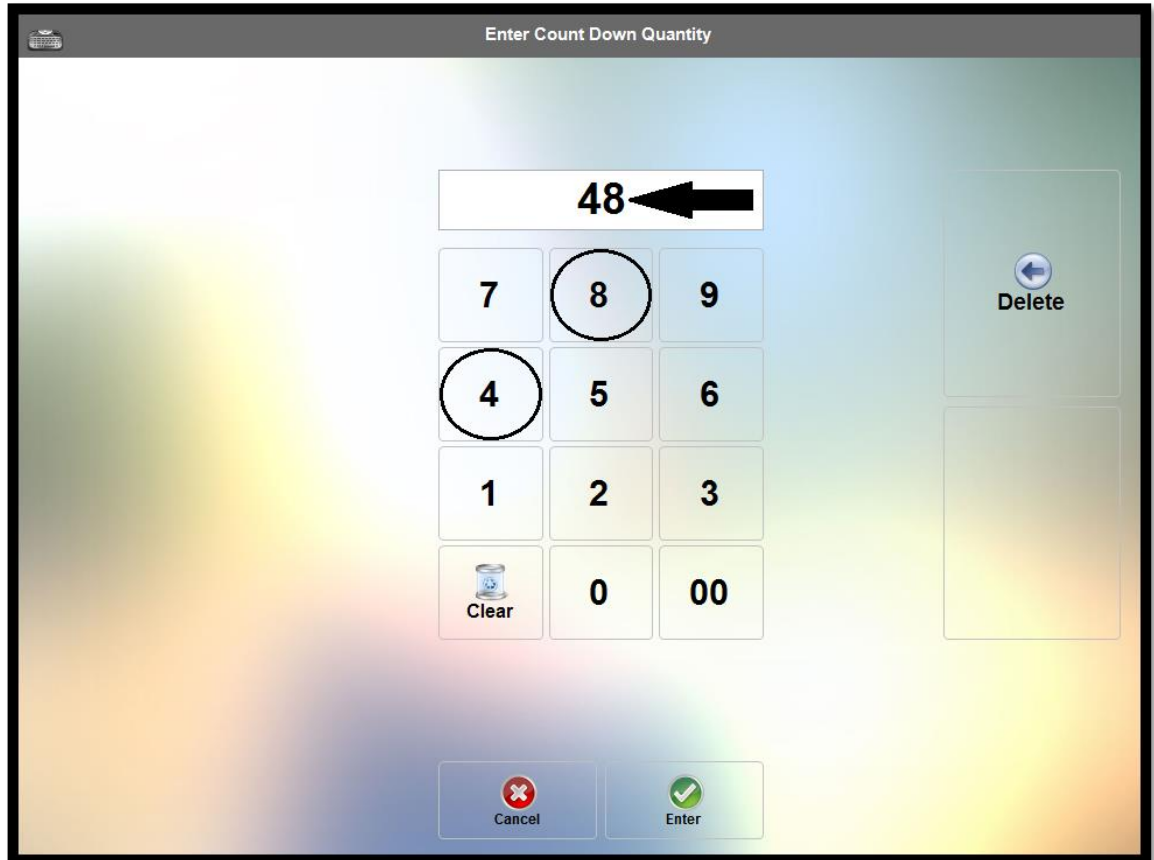


Figure 39-65

Recipe

After selecting the menu item from the grid on the left side of the screen, click the *Recipe* button if you wish to view the recipe information that was entered for the menu item in the XERA® POS Manager application. Please note that if the optional recipe information has not been entered for the menu item, then nothing displays when this feature is selected.

Go Back

Click the *Go Back* button to exit the Count Down List Add Items screen without saving your changes.

Lookup by Item UPC

To lookup a menu item by the UPC number, click the lookup method button repeatedly until the caption on the button reads “Lookup by UPC.” Next, enter the UPC number by using the virtual numeric keypad on the right side of the screen.

As each digit is entered, it appears on the lookup method button. At the same time, an incremental search is performed and a dynamic list of menu items whose UPC numbers contain the numeric character string entered thus far appears in the grid on the left side of the screen. As each additional digit is entered, the list is filtered further, reducing the number of menu items that contain the string of numeric characters entered. As soon as your desired menu item appears in the list, click on it to select it. It is not necessary to continue entering digits if the menu item you are seeking is already displayed in the grid. Alternatively, when the caption on the button reads “Lookup by UPC” you may scan the barcode on the item with your barcode scanner device.

When finished, click the *Add* button (See Figure 39-66).

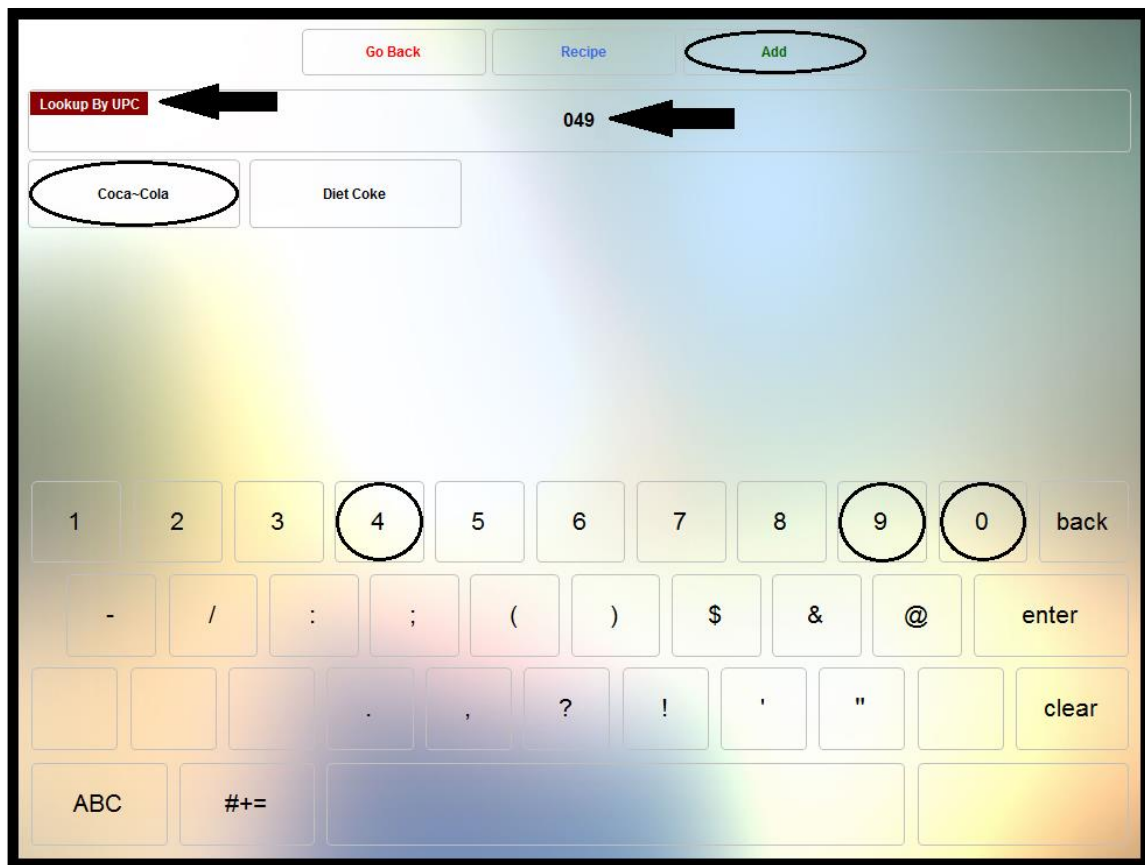


Figure 39-66

(Please note: UPC codes must be assigned to each of your menu items in the XERA® POS Manager application, or else nothing displays when you search by UPC.)

Next, the Enter Count Down Quantity window displays. Using the virtual keypad, enter the quantity of the selected menu item that is currently in stock. As this number is entered, it displays in the field directly above the virtual keypad.

When finished, click the *Enter* button to add the menu item to the Count Down List (See Figure 39-67).

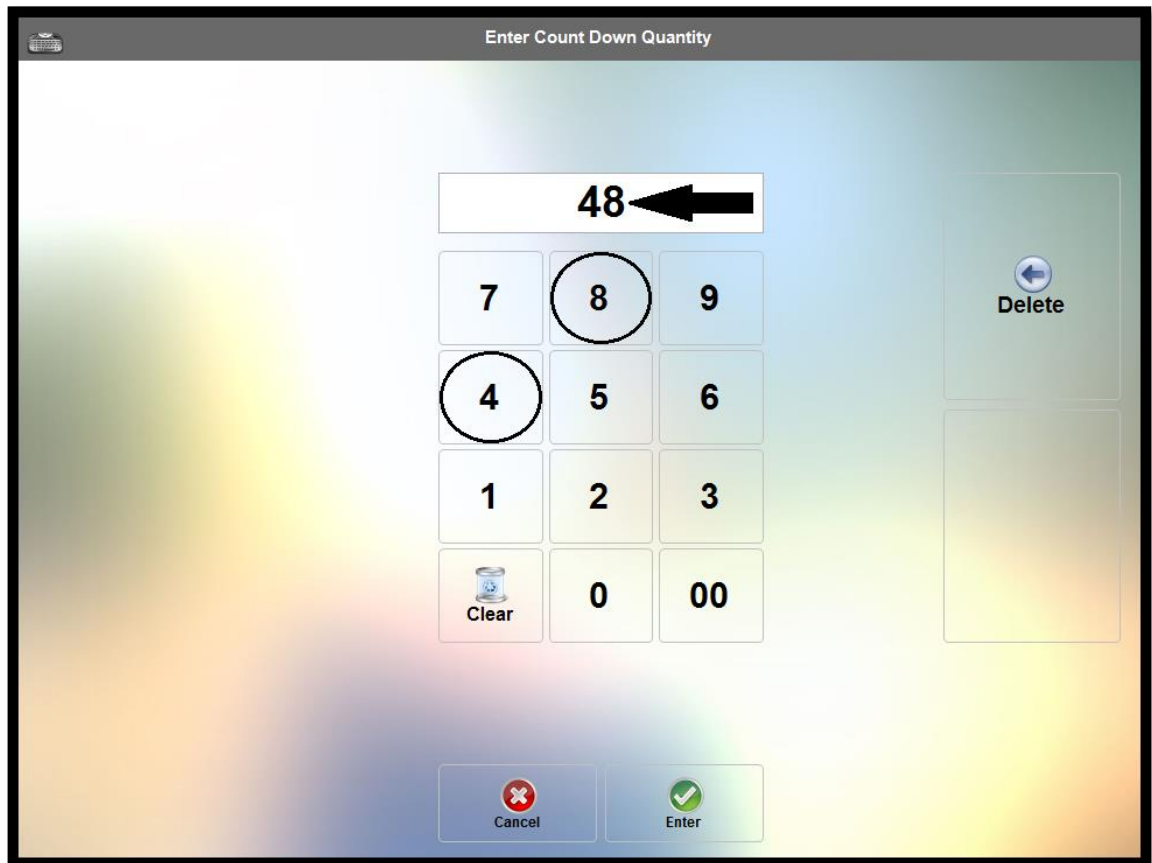


Figure 39-67

Recipe

After selecting the menu item from the grid on the left side of the screen, click the *Recipe* button if you wish to view the recipe information that was entered for the menu item in the XERA® POS Manager application.

Please note that if the optional recipe information has not been entered for the menu item, then nothing displays when this feature is selected.

Go Back

Click the *Go Back* button to exit the Count Down List Add Items screen without saving your changes.

Now the next time a staff member selects the menu group containing the menu item to which you just added the countdown quantity, the quantity remaining for that item may be seen in the upper-left corner of the item's button on the Order Entry screen (See Figure 39-68).

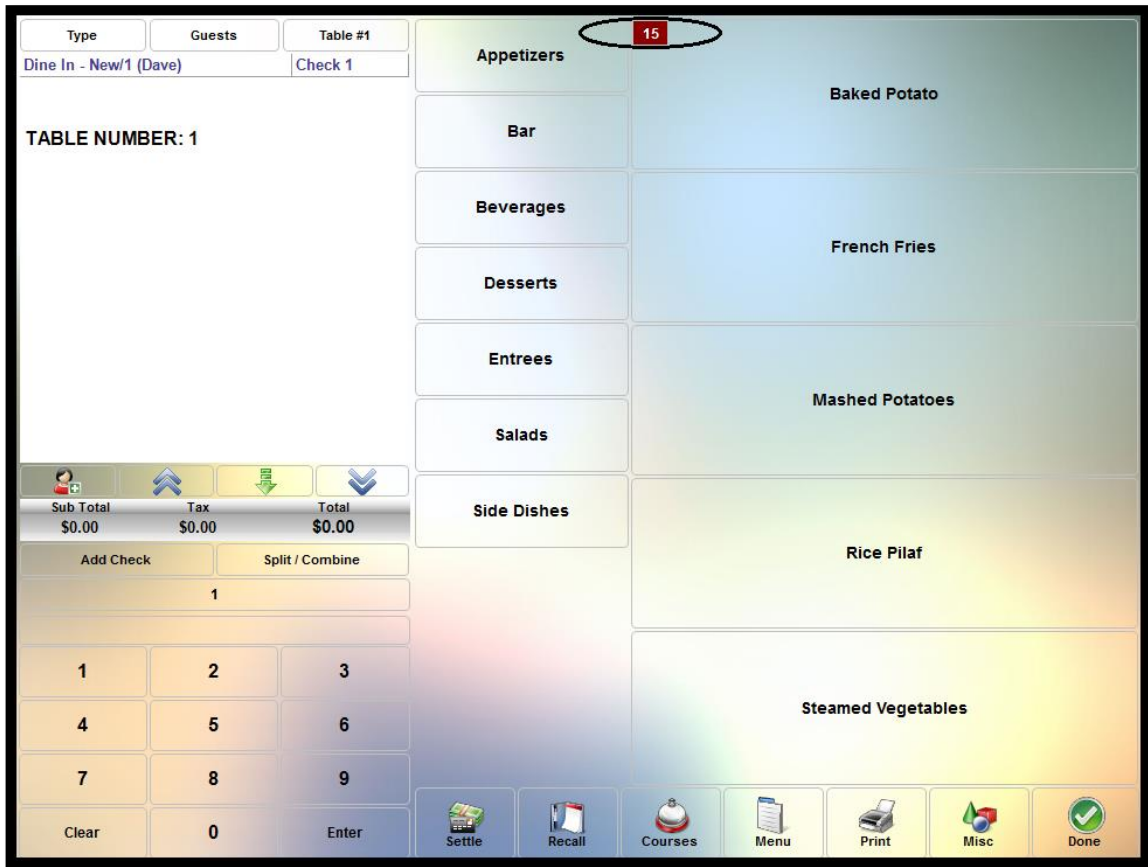


Figure 39-68

Ordering the menu item by clicking on it in the Order Entry screen adds the menu item to the customer’s order on the left side of the screen and decrements the quantity remaining for the item by one (See Figure 39-69).

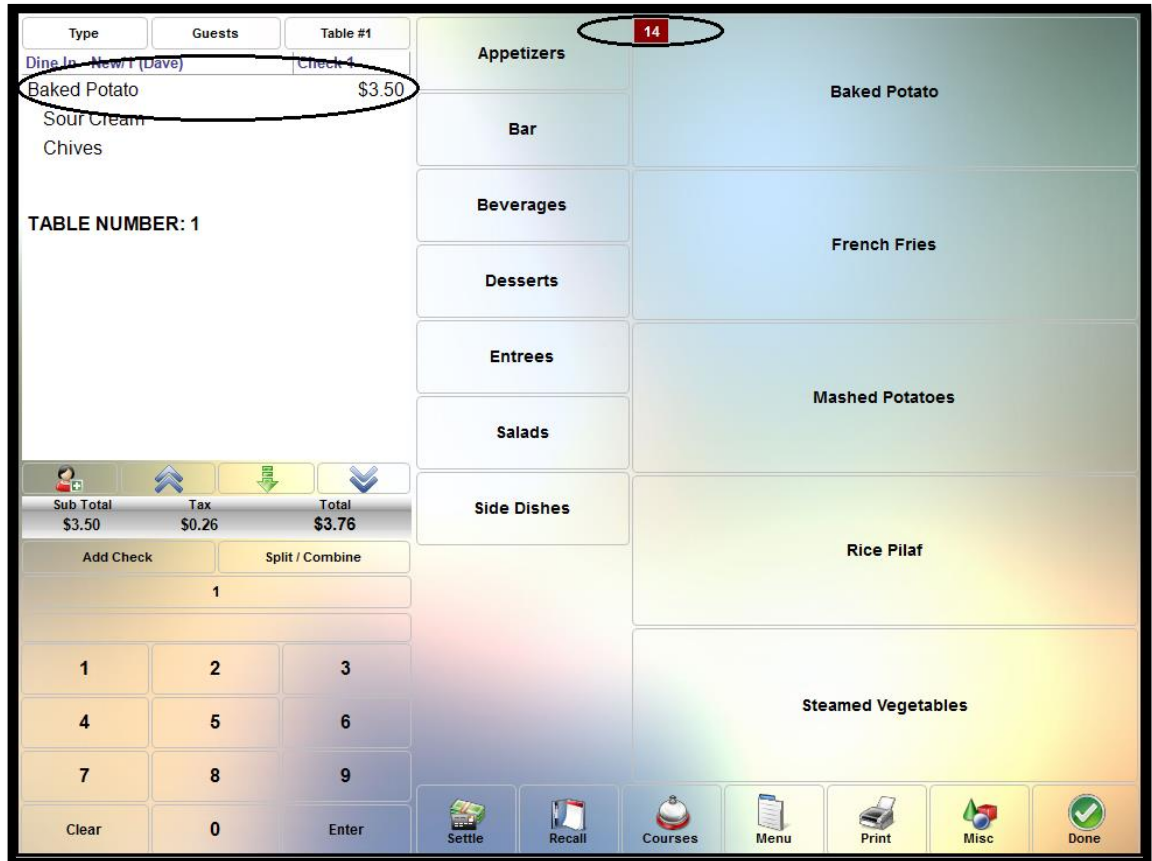


Figure 39-69

Customer Order Actions

Customer Order Actions are those actions that are performed on a customer’s entire order or on one or more individual menu items that are on a customer’s order. To view the customer order actions that are available to the user, create a new order and add one or more menu items to it.

Next, click on one of the menu items on the guest check to select it. The selected menu item is highlighted and the customer order actions appear down the middle of the screen, to the right of the virtual guest check (See Figure 39-70).

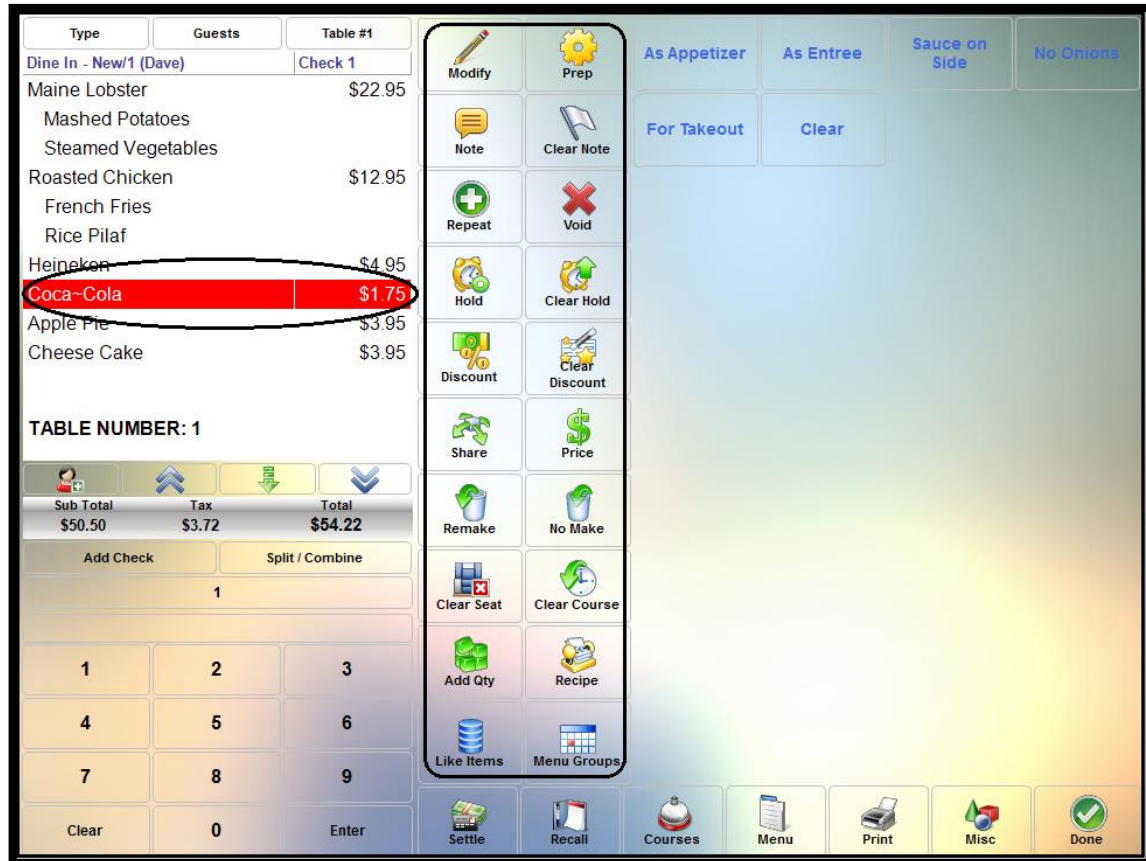


Figure 39-70

Please note that many of the actions described in the following subsections may be performed on multiple menu items at once. Select multiple menu items on the guest check by clicking on them in succession until all desired menu items are highlighted.

MODIFY

To make a change to a previously chosen modifier for a menu item, select the desired menu item from the guest check by clicking on it and then click the *Modify* button. The menu item's modifier template displays, and the existing modifier selection is highlighted on the button grid. Click on the desired new modifier to remove the existing modifier from the menu item and assign the new modifier to the menu item on the guest check. Continue in this manner to change any additional modifiers that are assigned to the menu item.

If two or more modifiers may be selected for the menu item, first deselect the undesired modifier by clicking on it and then select the replacement modifier by clicking on it.

PREP

When the user selects a menu item from the displayed guest check and then clicks the *Prep* button, the modifier builder template that is associated with the prep type of the menu item displays, allowing the user to add to or change any modifiers that are associated with the prep type.

Please note that to use this feature, an entry must be made in the XERA® POS Manager application by navigating to **Company Tab > Operations > Prep Types**, selecting the desired prep type from the List Tab to display it under the Main Tab, and then clicking the *down arrow* button to the right of the Prep Modifier Template field. Select the desired prep modifier template by clicking on it in the list.

NOTE

The Note feature allows the user to enter a freehand note and have it appear on the guest check under the selected menu item.

To create a menu item note, select the desired menu item by clicking on it in the guest check and then click the *Note* button to display the Enter Note virtual keyboard. Enter your note on this keyboard and then click the *OK* button when finished (See Figure 39-71).

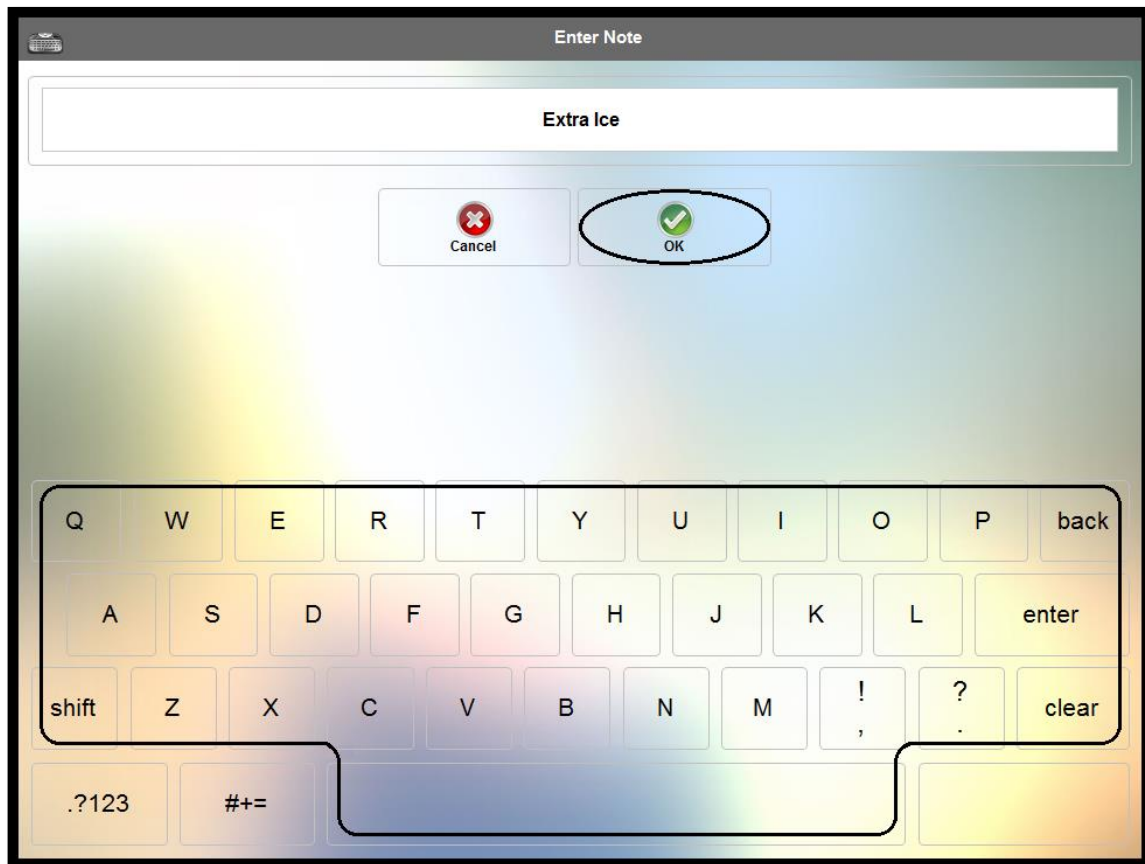


Figure 39-71

The note is added to the selected menu item on the guest check (See Figure 39-72).

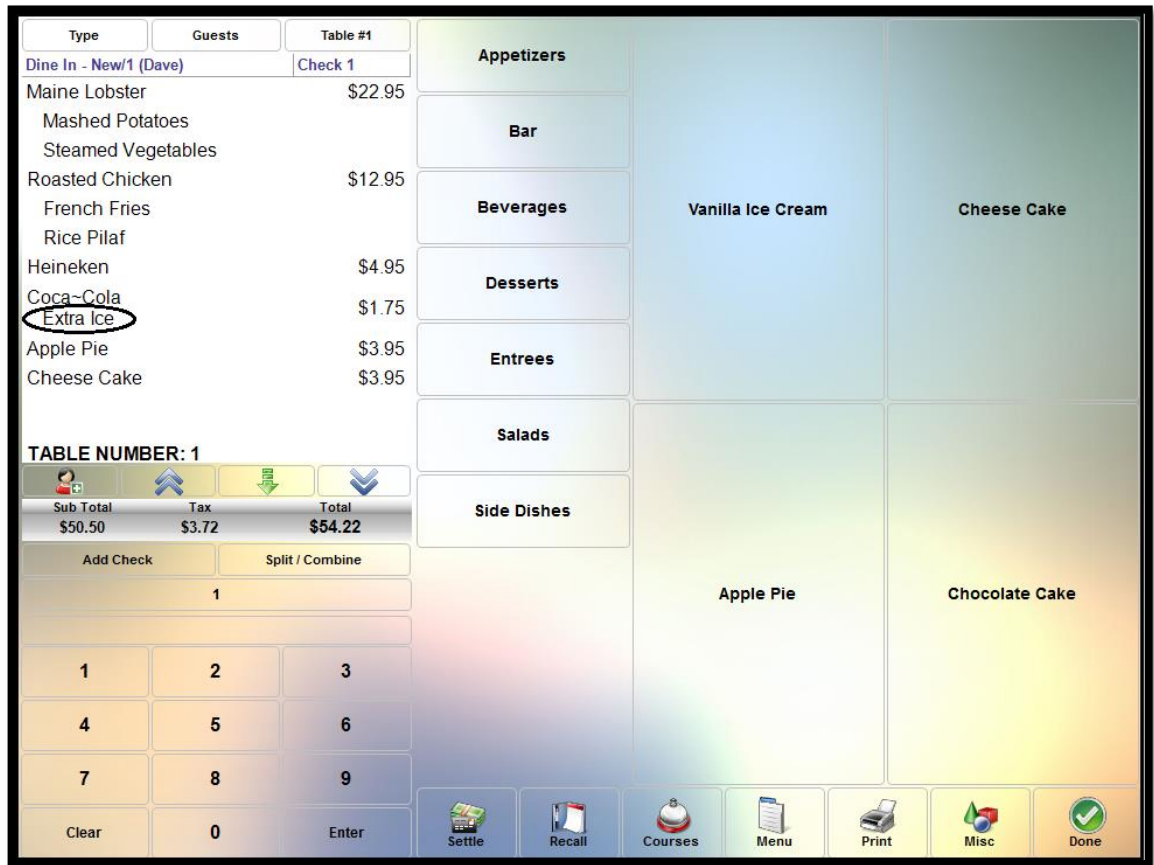


Figure 39-72

CLEAR NOTE

To remove a note that was previously attached to an item on the guest check, select the menu item on the guest check by clicking on it and then select the *Clear Note* button. The note is removed immediately.

REPEAT

The Repeat feature allows the user to select one or more menu items from the guest check and add identical copies of those menu items (including all selected modifiers) to the guest check without the need to re-order the items from the menu.

To use the feature, select the item or items you wish to repeat from the guest check by clicking on them. Next, click the *Repeat* button. An additional copy of each of the menu items you

selected is added to the bottom of the guest check and the total monetary amount of the guest check is adjusted to reflect the added items.

VOID

The Void feature allows the user to select one or more menu items to be deleted permanently from the guest check. To use the feature, select the item or items you wish to delete from the guest check by clicking on them. Next, click the *Void* button. Each of the menu items you selected is deleted from the guest check and the total monetary amount of the guest check is adjusted to reflect the deleted items.

HOLD

The Hold feature allows the user to select one or more menu items and postpone sending the order to the kitchen for preparation. To use the feature, select the item or items you wish to postpone from the guest check by clicking on them. Next, click the *Hold* button to display the Hold Time Entry screen. There are three ways that a hold may be placed on your menu item(s).

Hold Until...

The Hold Until feature allows the user to enter the time of day when he wishes to have the hold expire. This time of day is entered through the time of day entry virtual keypad on the left side of the screen by using the *up arrow* and *down arrow* keys to change the time displayed on the virtual keypad. When the desired time is reached, click the *Timed Hold* button to begin the hold time period (See Figure 39-73).

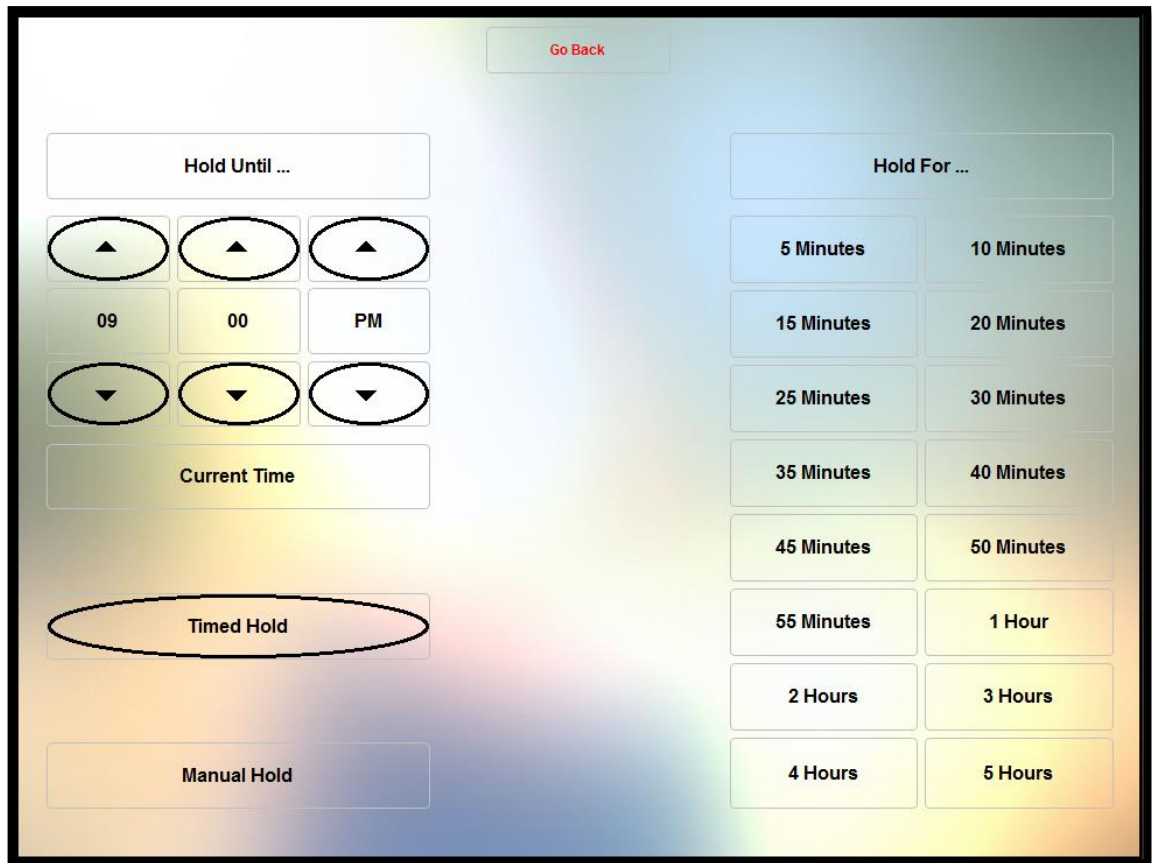


Figure 39-73

Please note that the desired hold expiration time of day must later than the current time of day, or an error message displays.

Hold For...

The Hold For feature allows the user to select a predetermined number of minutes or hours for which to postpone the preparation of the selected menu item(s).

To use this feature, simply click the button on the right side of the screen that corresponds with the number of minutes or hours that you wish to postpone the preparation of the selected menu item(s) (See Figure 39-74).

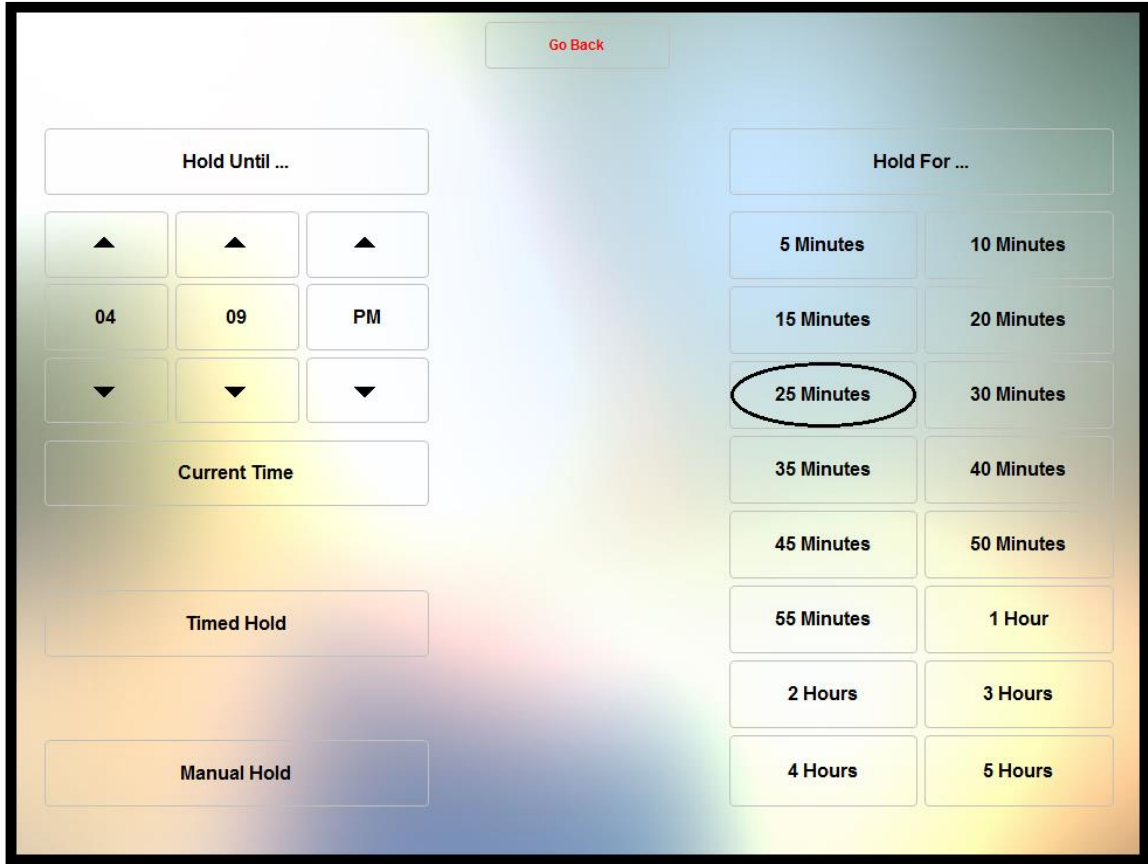


Figure 39-74

Manual Hold

When a manual hold is placed on a menu item, the hold remains in place until it is cleared by the user. The order is not sent to the kitchen for preparation until the hold is manually released.

To place a manual hold on one or more menu items, select the desired menu item or items from the guest check, click the *Hold* button, and then click the *Manual Hold* button on the Hold Time Entry screen (See Figure 39-75).

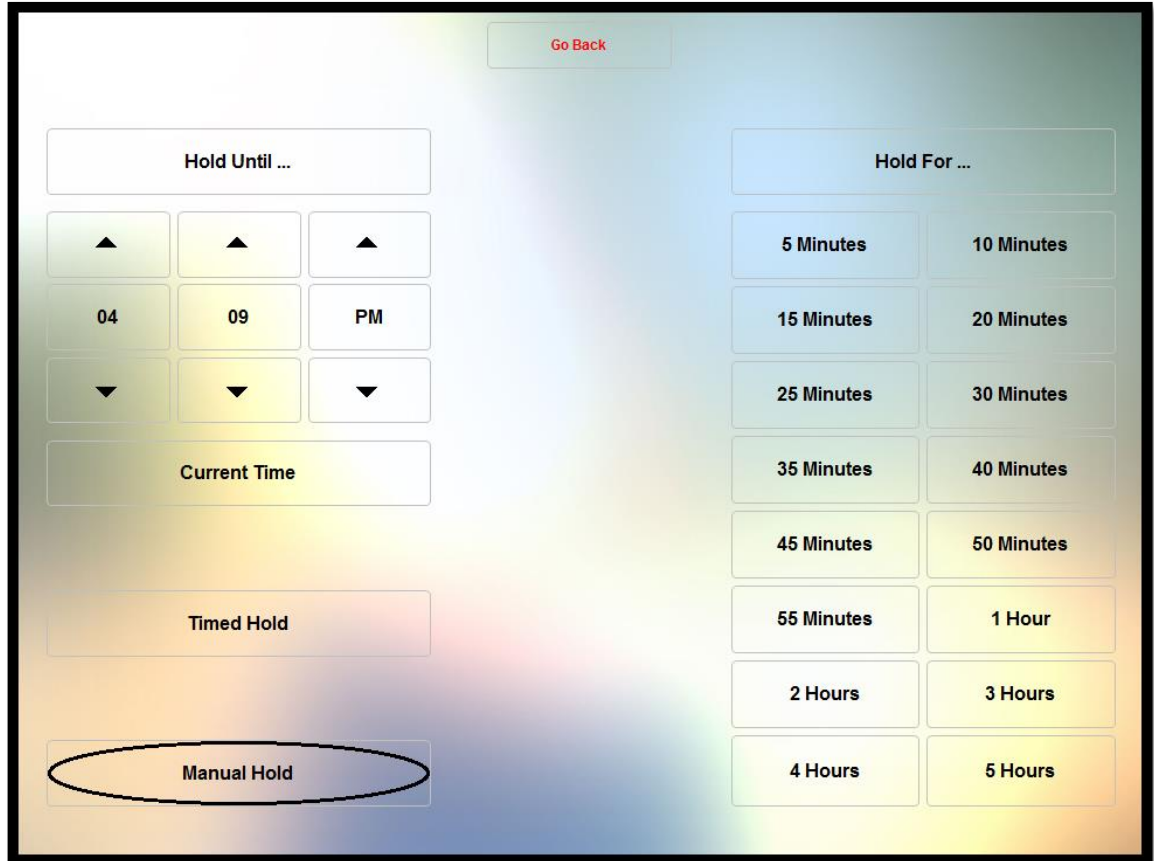


Figure 39-75

Hold Time Display

As each type of hold is placed on the menu item(s), the display returns to the view of the guest check. The hold is listed directly below the selected menu item(s) on the guest check. If the hold is for a finite amount of time, the message on the guest check reads “||HOLD UNTIL XX:XX XX||,” where XX:XX XX is displayed as the expiration time of day (for example, 11:55 AM). When a manual hold is placed on the item, the message simply reads “||HOLD||.” This indicates that this hold will remain in place indefinitely until the user releases it manually.

CLEAR HOLD

The Clear Hold feature of XERA® POS allows the user to remove a hold that was placed on one or more menu items previously. In the case of a manual hold, the hold may be released at any

time; however, in the case of a hold for a finite amount of time, the hold may only be cleared manually before it expires automatically.

To clear the hold time from one or more menu items, select the menu item(s) from the smart check by clicking on it (them). This highlights the selected menu item(s) on the smart check. Next, click the *Clear Hold* button (See Figure 39-76).

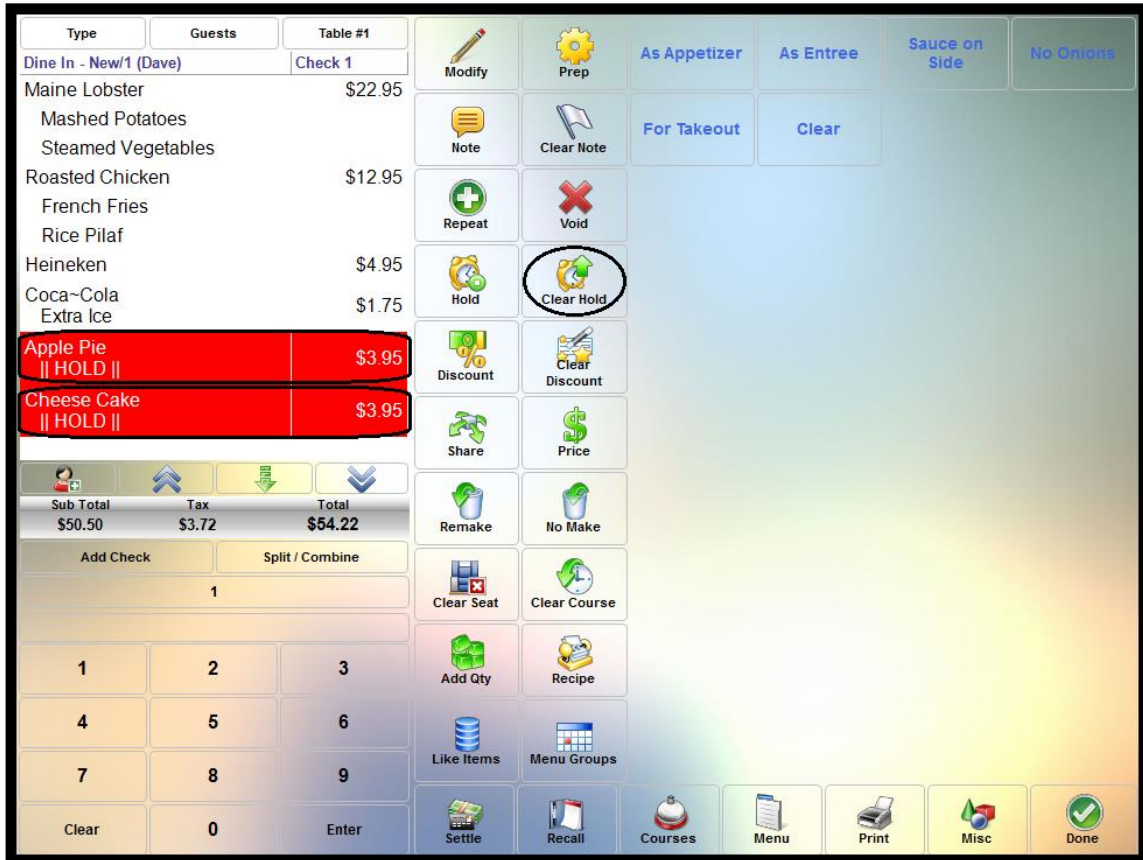


Figure 39-76

The holds on the selected menu items are cleared (See Figure 39-77).

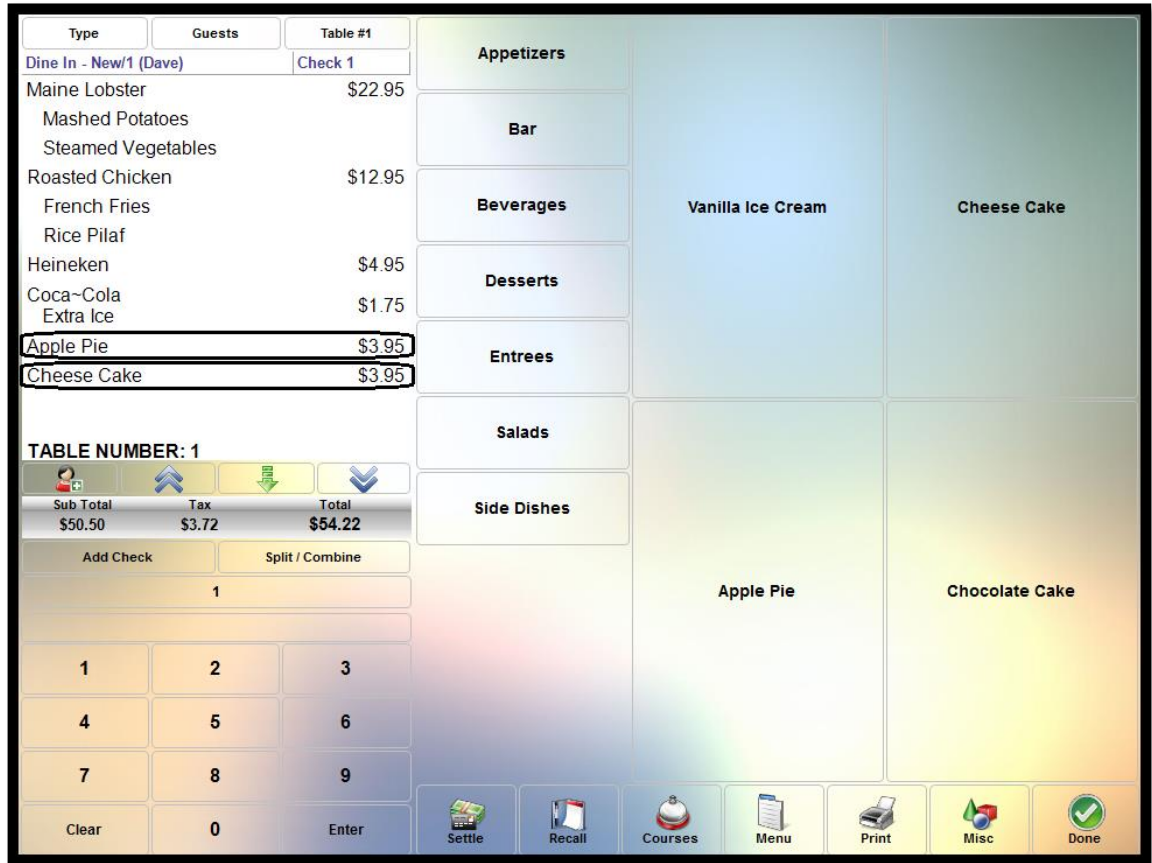


Figure 39-77

The menu items are sent to the kitchen the next time the user clicks the *Done* button.

DISCOUNT

The Discount feature allows the user to apply a discount to one or more menu items. The available discounts are user defined and are setup in advance in the XERA® POS Manager application as item level discounts.

To apply a discount to one or more menu items, select one or more menu items by clicking on them in the smart check. Next, click the *Discount* button (See Figure 39-78).



Figure 39-78

On the right side of the screen, one button appears in the grid for each item level discount that was setup previously in the XERA® POS Manager application (please see the XERA® POS Manager Manual for more information on setting up discounts).

Select the discount you wish to apply by clicking on its respective button (See Figure 39-79).

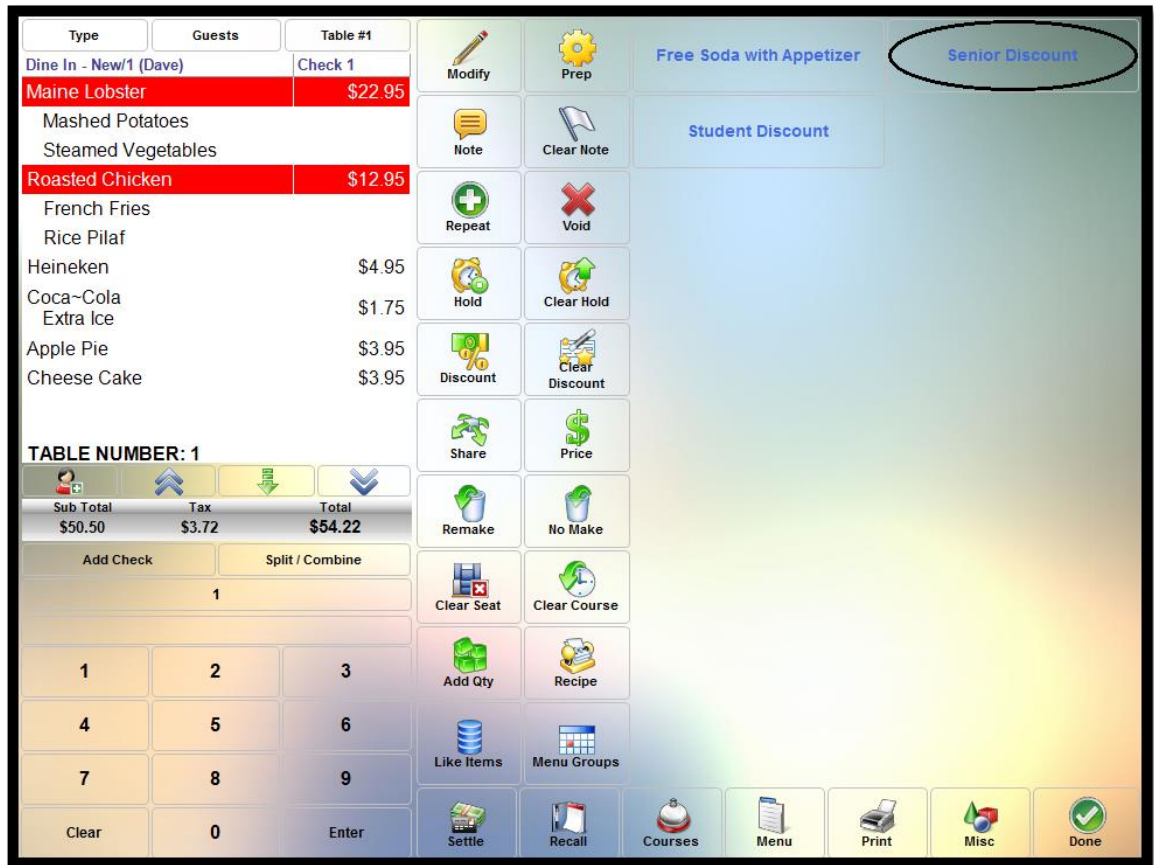


Figure 39-79

There are four different types of item discounts that may be created in the XERA® POS Manager application: a fixed amount discount, an open amount discount, a percentage amount discount, and a buy one get one (BOGO) discount.

Fixed Amount Type Discount

If the selected discount is of the fixed type, then simply clicking the fixed type discount button automatically applies the fixed discount to the guest check.

Open Amount Type Discount

If the selected discount is of the open type, then a virtual numeric keypad appears at the bottom of the guest check after the open discount type button is clicked. Enter the monetary amount of

the discount through this virtual keypad. Click the *Enter* button on the keypad when finished to apply the discount to the selected menu items on the guest check.

Percentage Amount Type Discount

If the selected discount is of the percentage type, then simply clicking the percentage type discount button automatically discounts the guest check by the predetermined percentage.

Buy One Get One (BOGO) Type Discount

A BOGO type discount is a special circumstance of any one of the above three discount types. The customer must select the required number of items from the qualifying group of menu items to receive the discount on the specified quantities from the qualified mix match group. The discount earned may be an open amount discount, a fixed amount discount, or a percentage amount discount. To apply the BOGO discount to the customer's order, the customer must order the appropriate number of items from the qualifying group and the appropriate number of items from the qualified mix match group. Next, click the *Discount* button. The appropriate discount amount is deducted from each of the menu items on the guest check that belong to the qualified mix match group.

Discount Display

Once the discount has been applied as per the above steps, the amount of the discount appears on the guest check directly beneath the selected menu item or items. The discount is also reflected as a reduction in the price of the menu item in the right column of the guest check (See Figure 39-80).

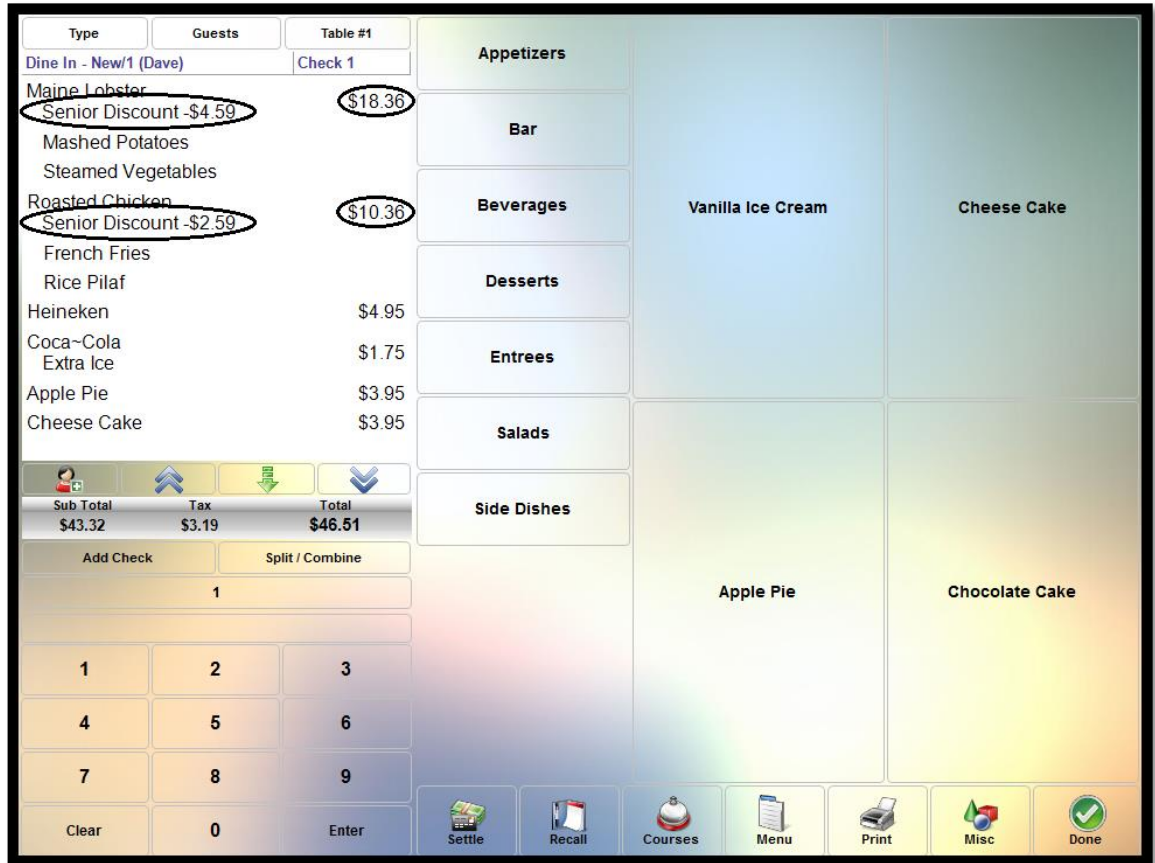


Figure 39-80

CLEAR DISCOUNT

To remove a previously applied discount from one or more menu items, click the discounted item or items on the guest check to select them and then click the *Clear Discount* button (See Figure 39-81).

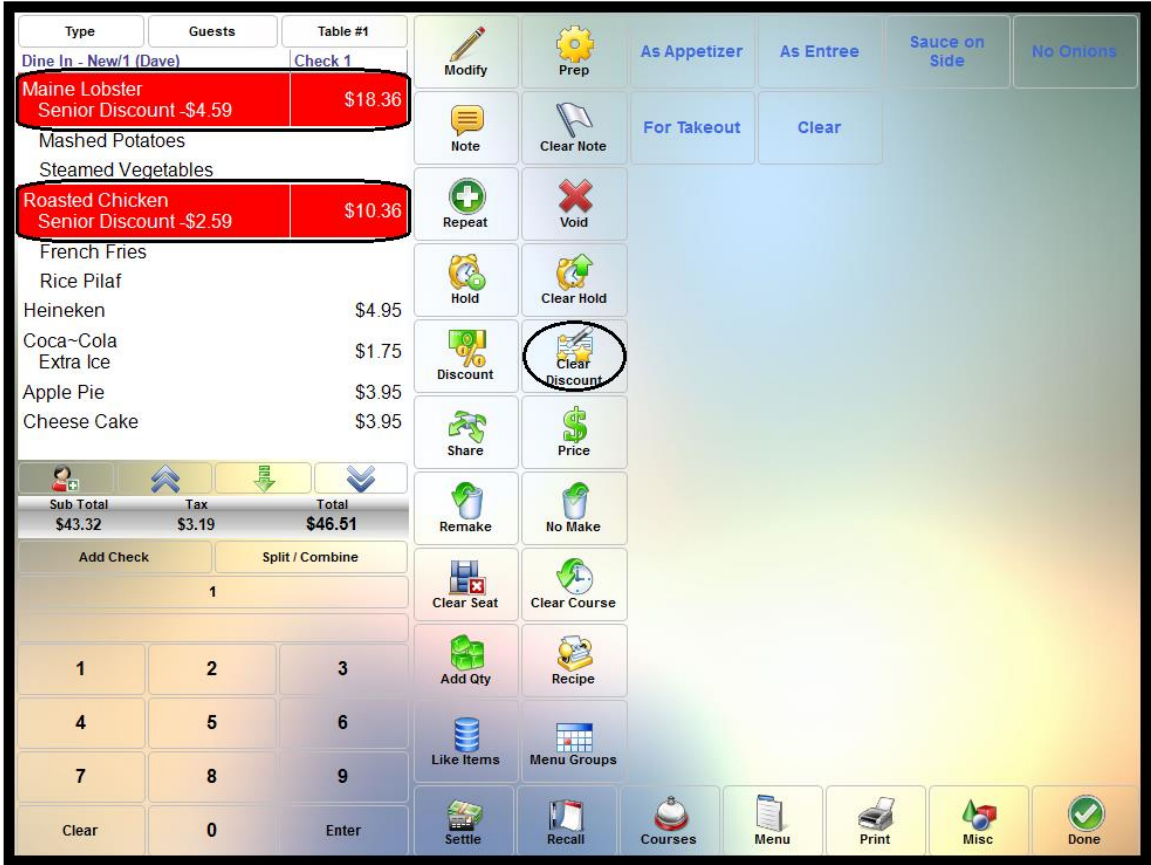


Figure 39-81

The discounts are immediately removed from the menu items displayed on the guest check and the prices of the items in the right column of the screen are adjusted to reflect the removed discounts (See Figure 39-82).

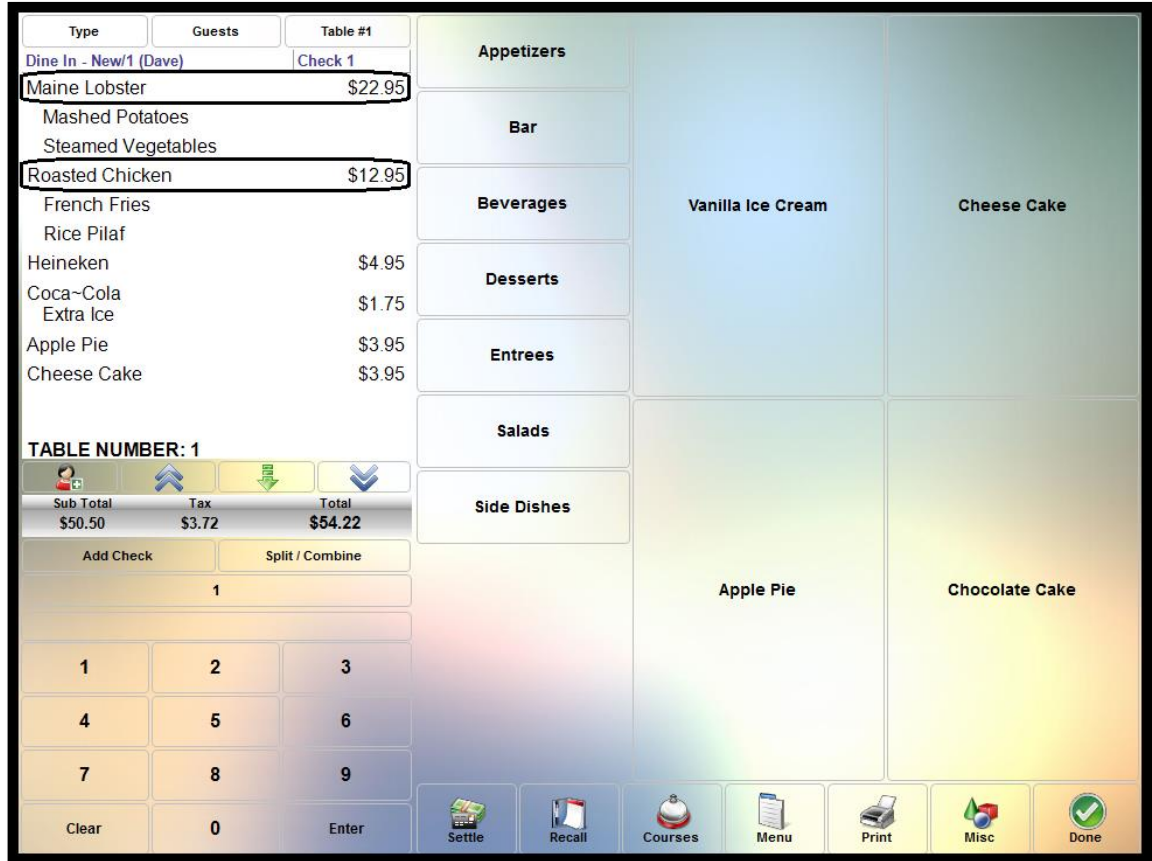


Figure 39-82

SHARE

The Share feature of XERA® POS allows the user to split a menu item among two or more guests and have each portion appear on the guest check as a separate item.

For example, if a dessert costs \$6.00 for a single portion, it may be shared between two guests and it appears on the guest check twice, with each portion billed at \$3.00. If it is shared among three guests, it appears on the guest check three times, with each portion billed at \$2.00, etc.

To share a menu item, select the menu item on the smart check by clicking on it and then click the *Share* button. A virtual numeric keypad displays at the bottom of the guest check. Enter the number of ways you wish to split the order and then click the *Enter* button when finished. An additional order for each of the number of ways the menu item is split appears at the bottom of the guest check. The shared quantity appears beneath the original listing for the menu item and each of the additional listings for the menu item. The price for each portion is also adjusted to reflect the number of ways the menu item is split.

To reverse the share operation, simply void any unwanted share portions from the smart check until the desired number of share portions is reached.

PRICE

The Price feature of XERA® POS allows the user to override the existing price of the selected menu item. The price may be increased or decreased.

To use this feature, select an item from the smart check and then click the *Price* button. A virtual numeric keypad displays on the screen beneath the guest check. Use the keypad to enter the new price and then click the keypad's *Enter* button. The price for the selected menu item is immediately updated on the guest check.

REMAKE

The Remake feature is used when the user wishes to notify the kitchen to prepare a previously prepared menu item again. The reasons that this might be necessary could vary, but could be because the original order was dropped on the floor, is not to the customer's preferences, was cold by the time it was served, etc.

To flag a menu item to be prepared again, select the menu item on the guest check by clicking on it and then click the *Remake* button. Beneath the menu item on the guest check, ">> RE-MAKE <<" appears and the menu item is sent to the kitchen for preparation again.

Please note that the Remake button has no affect if the original order has not yet been sent to the kitchen for preparation.

NO MAKE

The No Make feature allows the user to notify the kitchen to not prepare a menu item that is being sent to the kitchen along with others. The reasons that this might be necessary could vary but, for example, might be because the user plans to prepare the menu item himself due to the guest having some very specific requirements that are not easily conveyed to the kitchen staff via the kitchen chit.

To flag a menu item to not be prepared with the other items on the kitchen chit, select the menu item on the guest check before sending it to the kitchen for preparation by clicking on it. Next, click the *No Make* button. Beneath the menu item on the guest check, ">> NO MAKE <<" appears. When the order is finally sent to the kitchen for preparation, the selected menu item is not included on the kitchen chit.

Please note that the No Make button has no affect if the original order has already been sent to the kitchen for preparation.

CLEAR SEAT

If seat numbers have been assigned to the guests on a guest check, the seat numbers may be removed by clicking the seat number on the guest check and then clicking the *Clear Seat* button. Each seat must be cleared individually in this manner.

CLEAR COURSE

The Courses feature of XERA® POS allows the user to segregate the customer's ordered menu items into distinct courses that may be prepared and served at the appropriate time. Courses are user-defined and are setup in the XERA® POS Manager application by navigating to **Seating Tab > Manage > Courses** and then clicking the *New* button. When an order's menu items have been assigned to courses, these assignments may be removed by using the Clear Course feature.

To clear the course assignment from one or more individual menu items, select the desired menu items from the smart check by clicking on them (multiple menu items need not be from the same course assignment). Next, click the *Clear Course* button. The menu items are removed from the respective courses to which they were previously assigned and are redisplayed at the bottom of the guest check under a section titled "Course Not Assigned."

To remove the course assignment from all of the menu items of a single course, select the course heading on the guest check (multiple courses may **not** be selected at the same time). Next, click the *Clear Course* button. The selected course is removed from the display and the menu items that were previously assigned to that course are redisplayed at the bottom of the guest check under a section titled "Course Not Assigned."

ADD QTY

The Add Quantity feature of XERA® POS allows the user to order one or more additional copies of one or more menu items that already exist on the customer's order. An exact copy of each of the menu items, including all of its modifiers, is added to the order for each additional quantity entered by the user.

To use this feature, select the desired menu items from the smart check by clicking on them. Next, click the *Add Qty* button. A virtual numeric keypad displays. Enter the extra quantity of items you wish to add to the order by entering the number via the keypad. Click the keypad's *Enter* button when finished. The additional quantities of the selected menu items are added to the bottom of the guest check and the monetary amount of the guest check is adjusted to reflect the new total.

RECIPE

The Recipe feature of XERA® POS allows the user to view the recipe for the selected menu item.

To do so, select the desired menu item from the guest check and then click the *Recipe* button. This displays a screen that shows a picture of the menu item and lists the menu item's preparation instructions.

When finished viewing the recipe, click the *OK* button at the top of the Recipe screen to return to the previous screen (See Figure 39-83).

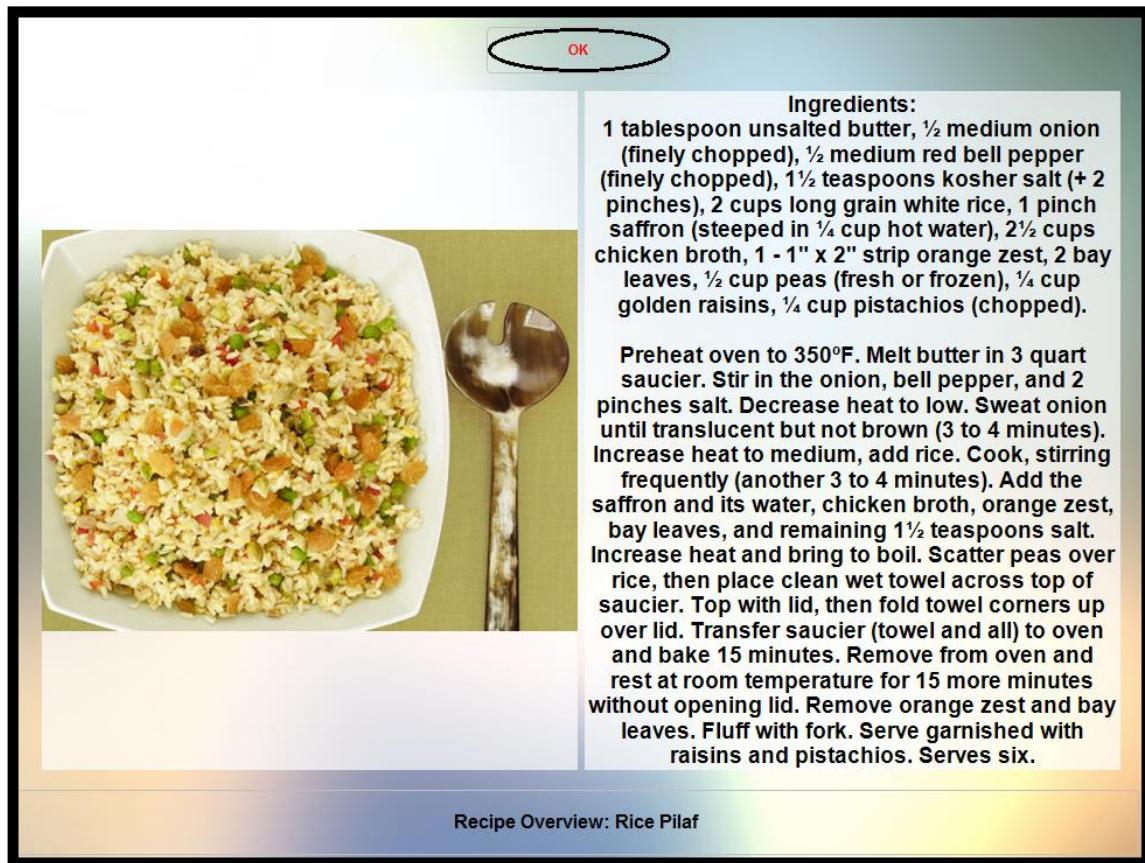


Figure 39-83

Please note that the recipe and the picture of the menu item must be setup in the XERA® POS Manager application in advance, or they do not display when the user clicks the *Recipe* button.

LIKE ITEMS

The Like Items feature allows the user to select all of the items on the guest check that are the same, even if they have different modifiers assigned to them. This feature is most useful when the guest check is very long and the user needs to perform the same action on all of them.

To select all of the items on the guest check that are the same, select one of the items and then click the *Like Items* button. All of the items on the guest check that are the same as the first one

selected are highlighted, allowing the user to perform the desired action on all of them at the same time.

MENU GROUPS

The *Menu Groups* button provides the user with a shortcut to the Menu Groups screen where a new menu group may be selected. Click this button whenever you wish to return to the Menu Groups screen.

Order Commands

Order Commands are additional instructions that may be added to the menu item listing on both the guest check and the kitchen chit.

For example, an order command might display “Sauce on the Side,” “As Appetizer,” or “Package to Go.” Order commands are predetermined and user-defined, and are setup in the XERA® POS Manager application by navigating to **Company Tab > Settings > Store Settings** and then expanding the Order Commands option. Up to 31 order commands may be created. These order commands appear on the right side of the screen whenever the smart check displays.

To add an order command to a menu item on the customer’s order, select the menu item from the guest check by clicking on it and then select the desired order command by clicking its respective button on the right side of the screen. The order command is immediately added to the guest check, directly beneath the menu item listing.

Additional Miscellaneous Features

The following additional miscellaneous features of XERA® POS are accessible by clicking on the *Misc* button from the Order Entry screen (See Figure 39-84).

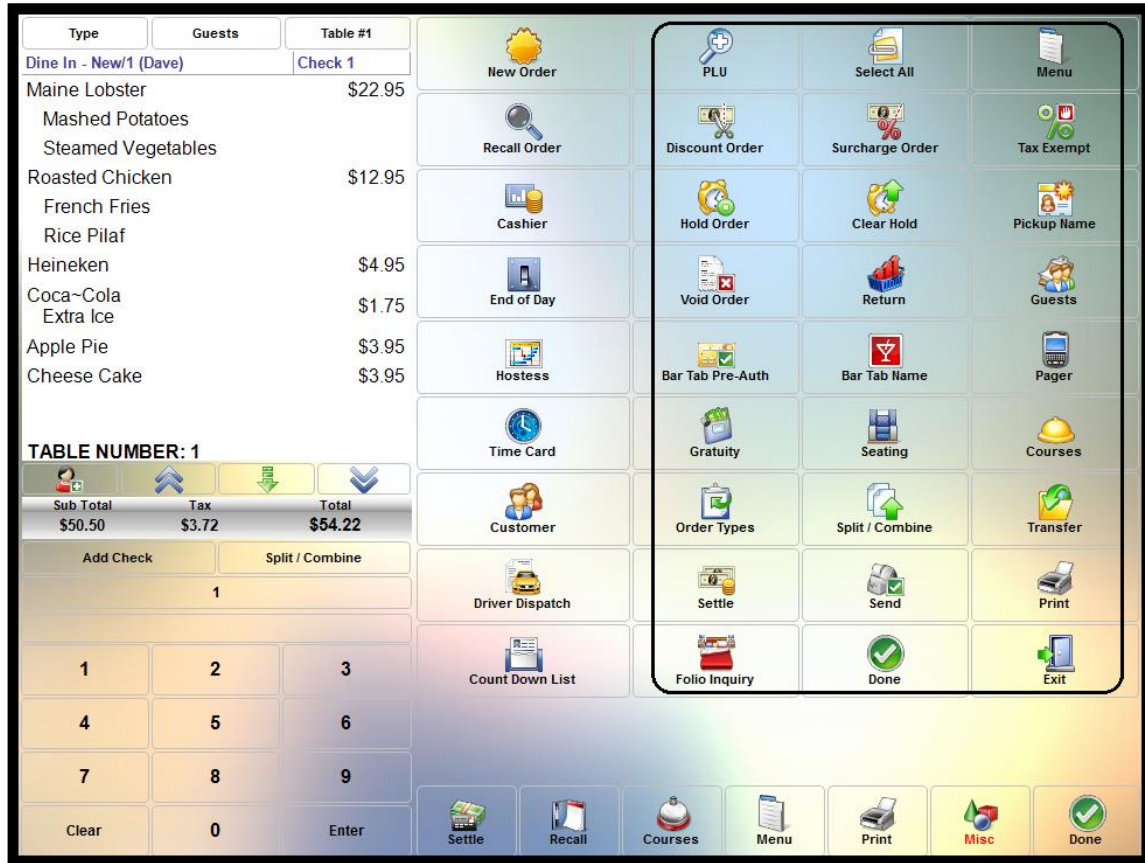


Figure 39-84

PLU

The PLU (Price Lookup) feature allows the user to find a specific menu item by entering one of three pieces of information: the Stock Keeping Unit (SKU) number, the Universal Product Code (UPC) number, or the item name.

Click the *Misc* button from the Order Entry screen to access the Additional Miscellaneous Features screen. Next, click the *PLU* button (See Figure 39-85).

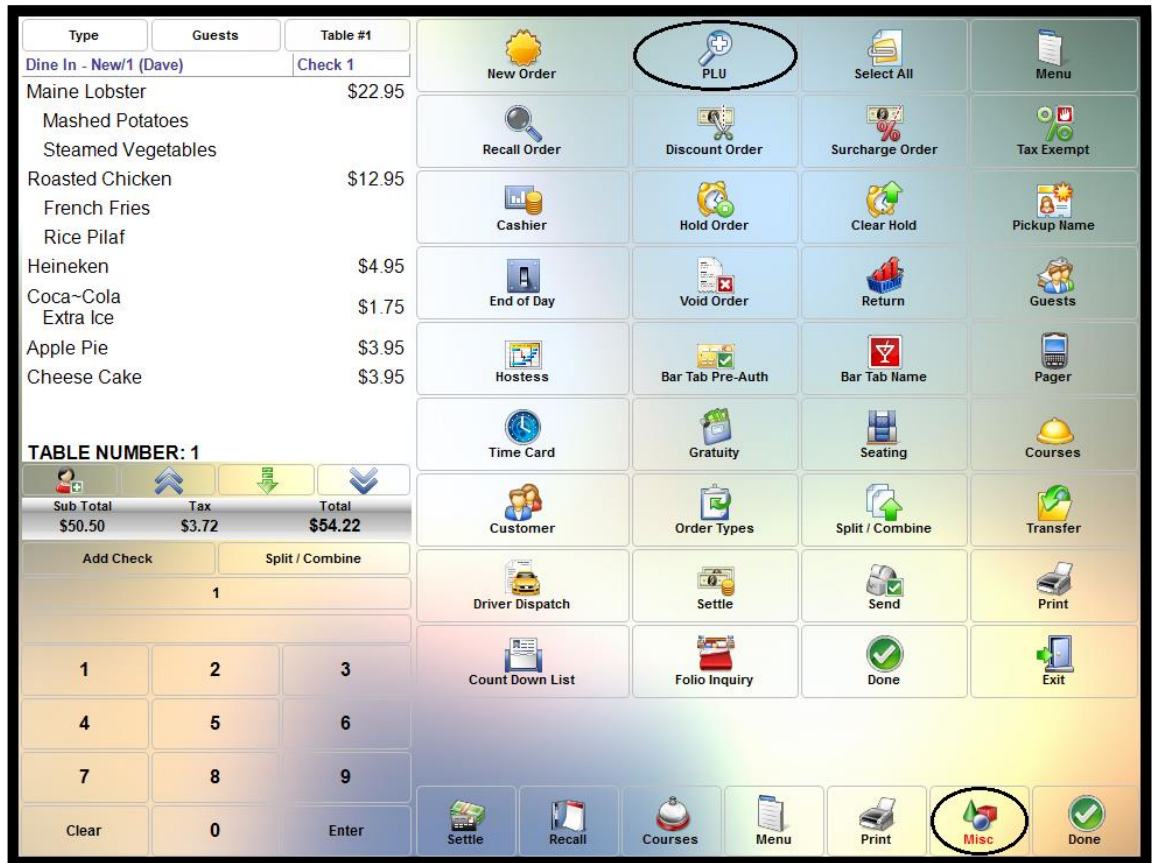


Figure 39-85

The PLU screen displays. The default search method, “Lookup by Item Name,” is displayed on the face of the *Lookup Method* button at the upper left portion of the screen (See Figure 39-86).

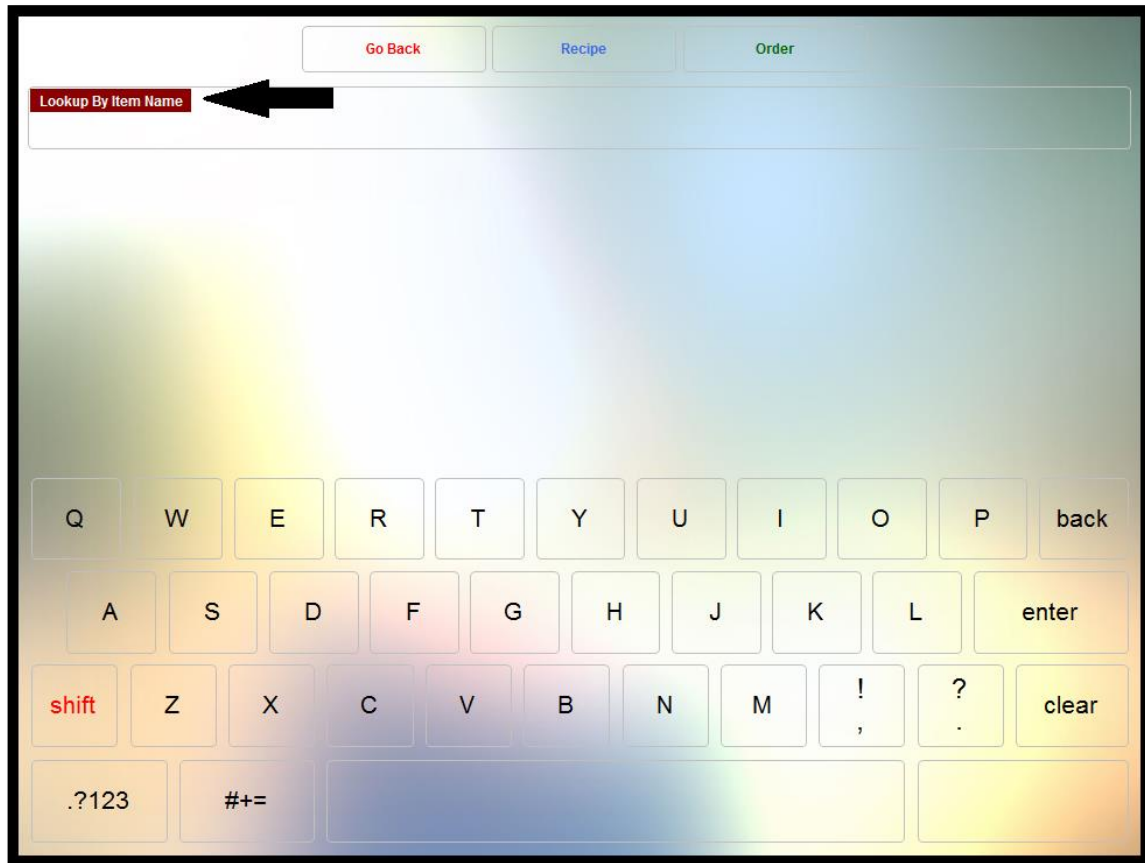


Figure 39-86

Lookup by Item Name

To lookup a menu item by the item name, click the *Lookup Method* button repeatedly until the caption on the button reads “Lookup by Item Name.” Next, enter the item name by using the virtual alpha keyboard at the bottom of the screen (if the numeric keyboard is displayed, click the *ABC* button to display the alpha keyboard).

As each character is entered, it appears on the face of the *Lookup Method* button. At the same time, an incremental search is performed and a dynamic list of menu items whose names contain the character string entered thus far appears in the grid in the center portion of the screen. As each additional character is entered, the list is filtered further, reducing the number of menu items that contain the string of characters entered. As soon as your desired menu item appears in the list, click on it to select it. It is not necessary to continue entering characters if the menu item you are seeking is already displayed in the grid.

When finished, click the *Order* button to add the menu item to your order (See Figure 39-87).



Figure 39-87

Recipe

After selecting the menu item from the grid in the center portion of the screen, click the *Recipe* button to view the recipe information that was entered for the menu item in the XERA® POS Manager application.

Please note that if the optional recipe information has not been entered for the menu item, then nothing displays when this feature is selected.

Go Back

Click the *Go Back* button to exit the PLU screen without saving your changes.

Lookup by Item SKU

To lookup a menu item by the SKU number, click the *Lookup Method* button repeatedly until the caption on the button reads “Lookup by SKU.” Next, enter the SKU number by using the virtual numeric keyboard at the bottom of the screen (if the alpha keyboard is displayed, click the .?123 button to display the numeric keyboard).

As each digit is entered, it appears on the face of the *Lookup Method* button. At the same time, an incremental search is performed and a dynamic list of menu items whose SKU numbers contain the numeric character string entered thus far appears in the grid in the center portion of the screen. As each additional digit is entered, the list is filtered further, reducing the number of menu items that contain the string of numeric characters entered. As soon as your desired menu item appears in the list, click on it to select it. It is not necessary to continue entering digits if the menu item you are seeking is already displayed in the grid.

When finished, click the *Order* button to add the menu item to your order (See Figure 39-88).

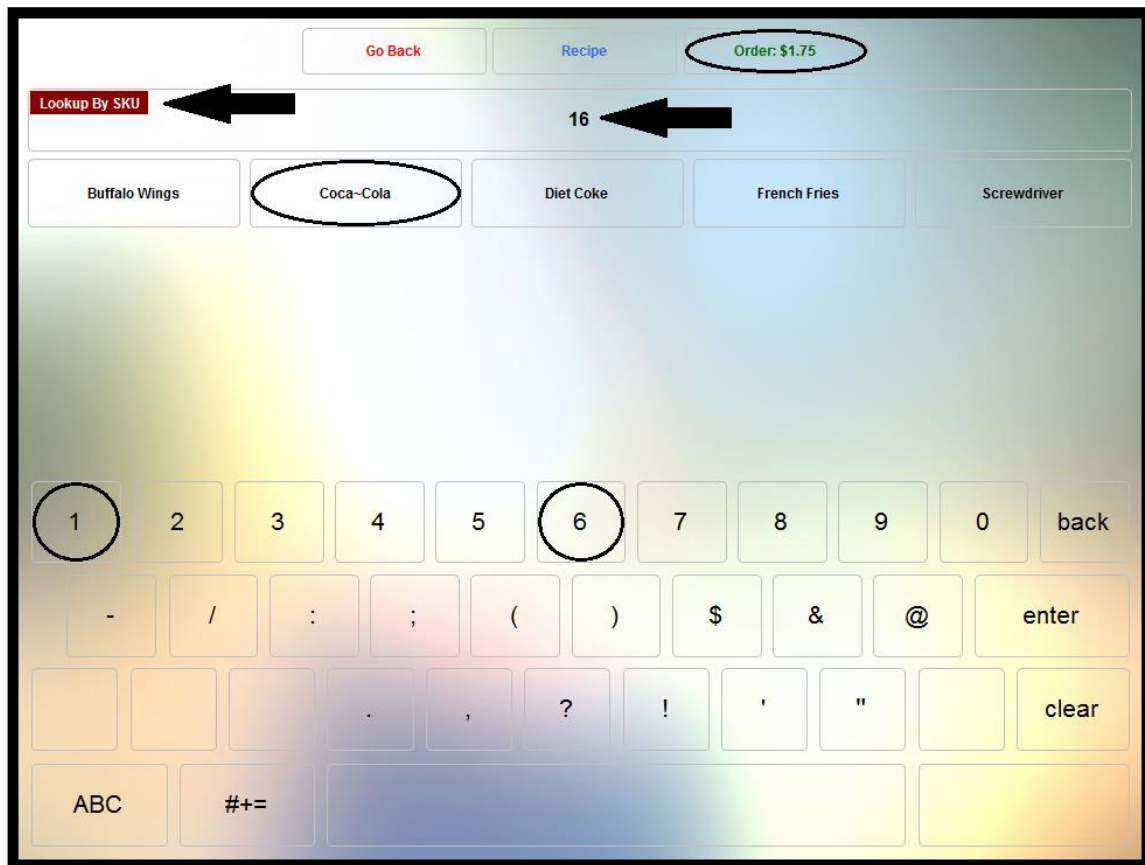


Figure 39-88

Recipe

After selecting the menu item from the grid in the center portion of the screen, click the *Recipe* button to view the recipe information that was entered for the menu item in the XERA® POS

Manager application. Please note that if the optional recipe information has not been entered for the menu item, then nothing displays when this feature is selected.

Go Back

Click the *Go Back* button to exit the PLU screen without saving your changes.

Lookup by Item UPC

To lookup a menu item by the UPC number, click the *Lookup Method* button repeatedly until the caption on the button reads “Lookup by UPC.” Next, enter the UPC number by using the virtual numeric keyboard at the bottom of the screen (if the alpha keyboard is displayed, click the *.?123* button to display the numeric keyboard).

As each digit is entered, it appears on the face of the *Lookup Method* button. At the same time, an incremental search is performed and a dynamic list of menu items whose UPC numbers contain the numeric character string entered thus far appears in the grid in the center portion of the screen. As each additional digit is entered, the list is filtered further, reducing the number of menu items that contain the string of numeric characters entered. As soon as your desired menu item appears in the list, click on it to select it. It is not necessary to continue entering digits if the menu item you are seeking is already displayed in the grid. Alternatively, when the caption on the button reads “Lookup by UPC” you may scan the barcode on the item with your barcode scanner device.

When finished, click the *Order* button to add the menu item to your order (See Figure 39-89).

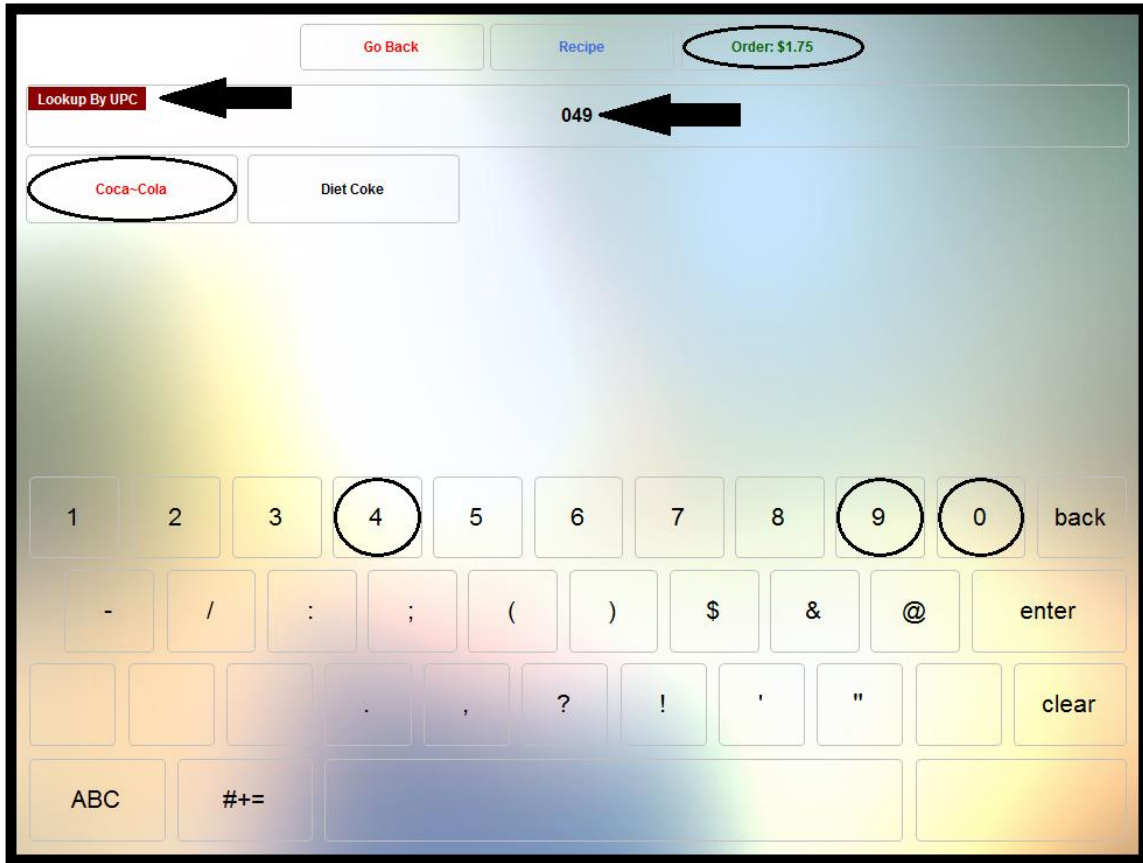


Figure 39-89

Recipe

After selecting the menu item from the grid in the center portion of the screen, click the *Recipe* button to view the recipe information that was entered for the menu item in the XERA® POS Manager application. Please note that if the optional recipe information has not been entered for the menu item, then nothing displays when this feature is selected.

Go Back

Click the *Go Back* button to exit the PLU screen without saving your changes.

SELECT ALL

The Select All feature of XERA® POS allows the user to select all existing menu items from the guest check at the same time so that the same action may be performed on them all at once. Click the *Misc* button on the Order Entry screen and then click the *Select All* button. At this point, the desired action may be performed on the menu items as a group by clicking on the desired action.

MENU

Select the *Menu* button to display the Menu Selection screen. Here the user may select from the various menus that were created in the XERA® POS Manager application. To select a specific menu from this screen, click on its respective button (See Figure 39-90).

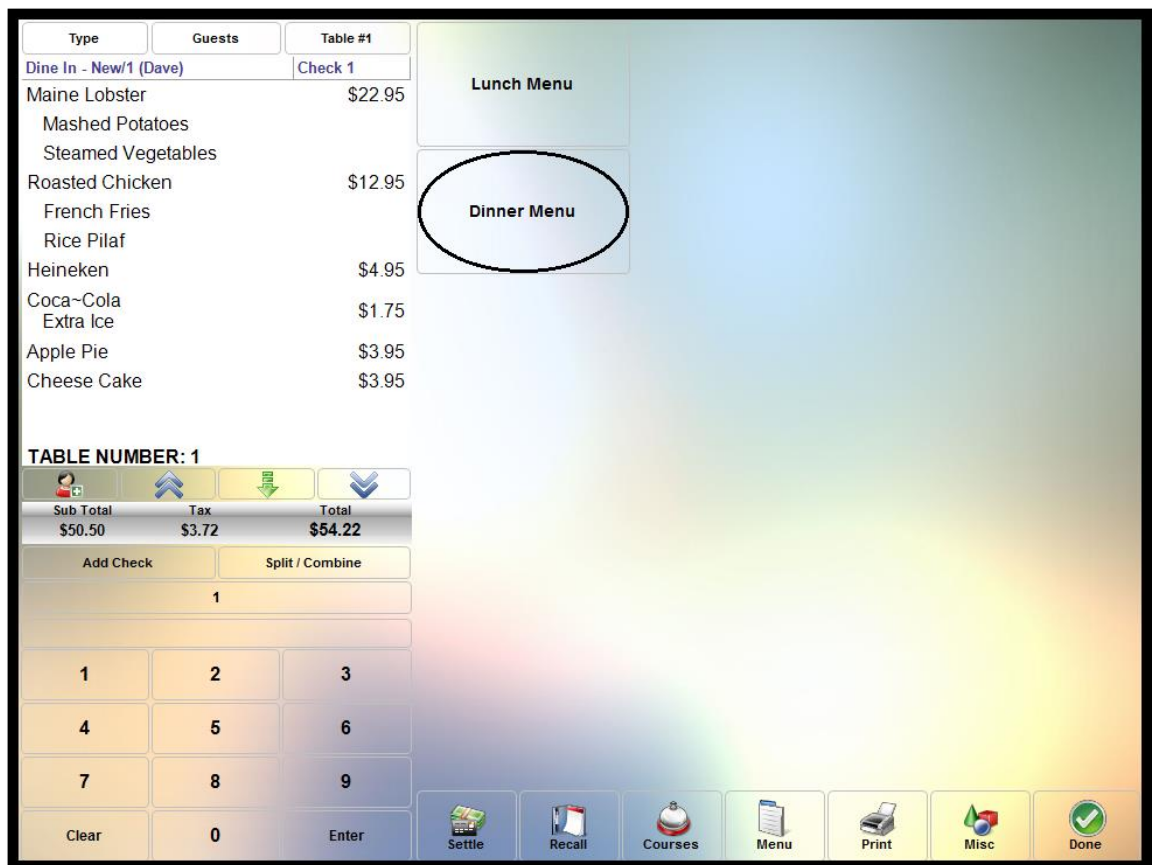


Figure 39-90

Menus are user defined and are created in the XERA® POS Manager application by navigating to **POS Tab > Menus > Menus** and then clicking the *New* button to display the Menus - [Add New Record] screen.

DISCOUNT ORDER

The Discount Order feature allows the user to apply a discount to the customer's entire order. The available discounts are user-defined and are setup in advance in the XERA® POS Manager application as order level discounts.

To discount an order, create a new order or recall an existing order. Next, click the *Discount Order* button to display the discounts that were setup previously in the XERA® POS Manager application. Select the desired discount by clicking on its respective button.

Please note that only one discount may be applied to an order. If the user attempts to apply a second discount of any type, then the subsequent discount automatically replaces the previous discount.

To remove a discount that was applied to an order previously, first recall the existing order. Next, click the *Discount Order* button and then click the *Clear* button. The discount is removed immediately.

Percent Type Discount

If the selected discount is of the percent type, then the predetermined discount percentage amount is displayed at the bottom of the guest check and automatically deducted from the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

Fixed Amount Type Discount

If the selected discount is of the fixed amount type, then the predetermined fixed discount amount is displayed at the bottom of the guest check and automatically deducted from the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

Open Amount Type Discount

If the selected discount is of the open amount type, then a virtual numeric keypad displays beneath the smart check. Enter the desired monetary amount of the discount via this keypad and then click the keypad's *Enter* button to apply the discount to the order. The entered discount amount is displayed at the bottom of the guest check and automatically deducted from the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

SURCHARGE ORDER

The Surcharge Order feature allows the user to apply a surcharge to the customer's order. The available surcharges are user-defined and are setup in advance in the XERA® POS Manager application as order surcharge types.

To apply a surcharge to an order, create a new order or recall an existing order. Next, click the *Surcharge Order* button to display the surcharges that were setup previously in the XERA® POS Manager application. Select the desired surcharge by clicking on its respective button.

Please note that only one surcharge may be applied to an order. If the user attempts to apply a second surcharge of any type, then the subsequent surcharge automatically replaces the previous surcharge.

Percent Type Surcharge

If the selected surcharge is of the percent type, then the predetermined surcharge percentage amount is displayed at the bottom of the guest check and automatically added to the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

Fixed Amount Type Surcharge

If the selected surcharge is of the fixed amount type, then the predetermined fixed surcharge amount is displayed at the bottom of the guest check and automatically added to the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

Open Amount Type Surcharge

If the selected surcharge is of the open amount type, then a virtual numeric keypad displays beneath the smart check. Enter the desired monetary amount of the surcharge via this keypad and then click the keypad's *Enter* button to apply the surcharge to the order. The entered surcharge amount is displayed at the bottom of the guest check and automatically added to the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

TAX EXEMPT

The *Tax Exempt* button allows the user to remove all taxes that have been applied to the customer order before settling it. In localities where taxes are required by law to be applied to the customer order, these taxes are setup in the XERA® POS Manager application so that they are automatically calculated and added to the customer order.

In certain cases, a particular customer order may be exempt from sales taxes. To remove the taxes from an order, recall the order and then click the *Tax Exempt* button. All sales taxes are immediately removed from the order (See Figure 39-91).

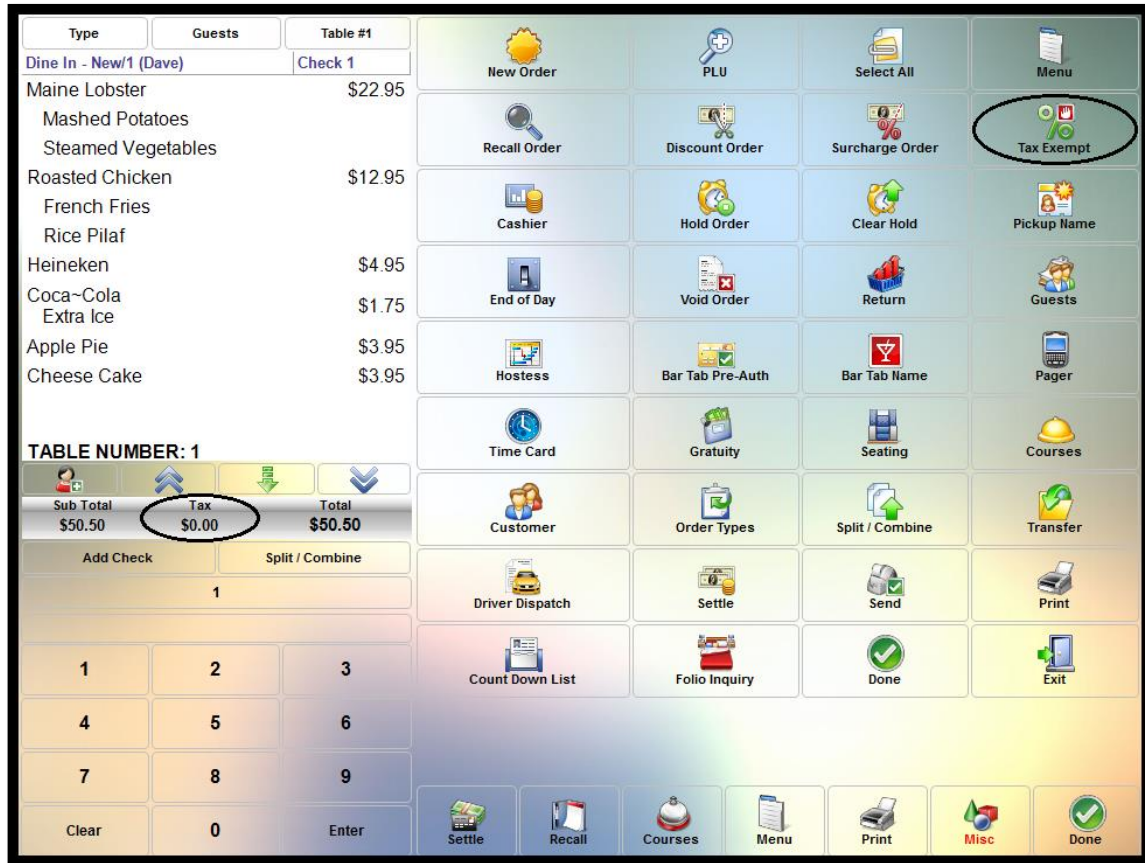


Figure 39-91

HOLD ORDER

The Hold Order feature allows the user to postpone sending the entire order to the kitchen for preparation. To use the feature, select the order you wish to postpone so that the smart check displays and then click the *Misc* button. Next, click the *Order Tasks* button and then click the *Hold Order* button to display the Hold Time Entry screen. There are three ways that a hold may be placed on the order.

Hold Until...

The Hold Until feature allows the user to enter the time of day when he wishes to have the order hold expire. This time of day is entered through the time of day entry virtual keypad on the left side of the screen by using the *up arrow* and *down arrow* keys to change the time displayed on the virtual keypad.

When the desired time is reached, click the *Timed Hold* button to begin the hold time period (See Figure 39-92).



Figure 39-92

(Please note: The desired hold expiration time of day must later than the current time of day, or an error message displays.)

Hold For...

The Hold For feature allows the user to select a predetermined number of minutes or hours for which to postpone the preparation of the order.

To use this feature, simply click the button on the right side of the screen that corresponds with the number of minutes or hours that you wish to postpone the preparation of the order (See Figure 39-93).

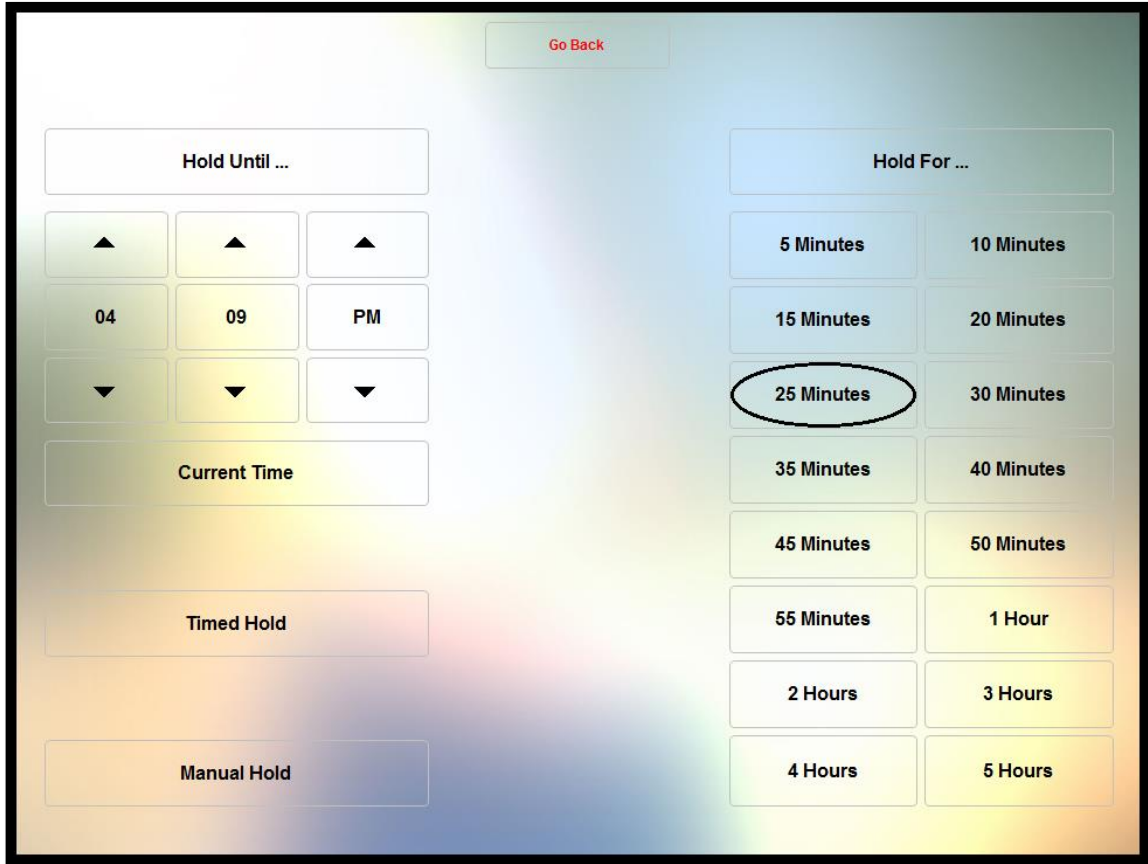


Figure 39-93

Manual Hold

When a manual hold is placed on an order, the hold remains in place until it is cleared by the user. The order is not sent to the kitchen for preparation until the hold is manually released.

To place a manual hold on an order, select the order you wish to postpone so that the smart check displays. Select the *Misc* button, the *Hold Order* button, and then click the *Manual Hold* button on the Hold Time Entry screen (See Figure 39-94).

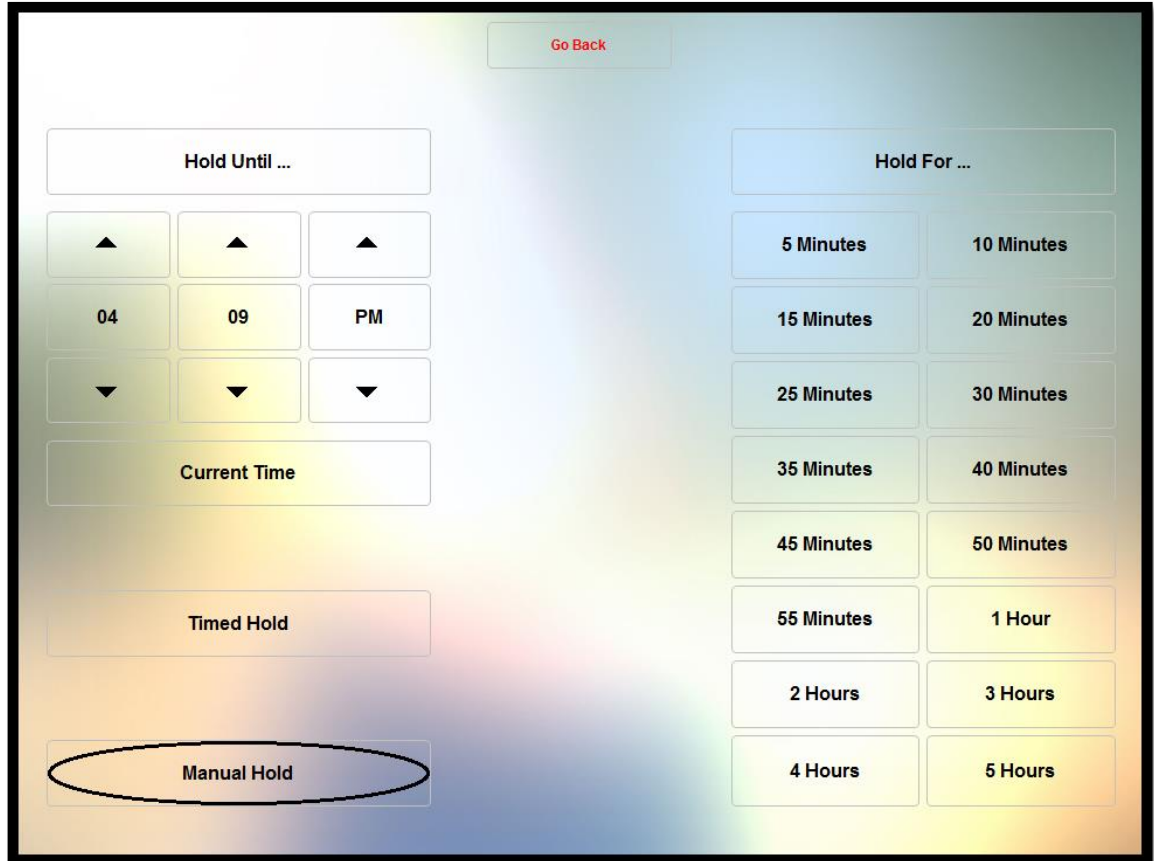


Figure 39-94

Hold Time Display

As each type of hold is placed on the order, the display returns to the view of the guest check. The hold is listed directly below each menu item on the guest check. If the hold is for a finite amount of time, the message on the guest check reads “||HOLD UNTIL XX:XX XX||,” where XX:XX XX is displayed as the expiration time of day (for example, 11:55 AM). When a manual hold is placed on the order, the message simply reads “||HOLD||.” This indicates that this hold will remain in place indefinitely until the user releases it manually.

CLEAR HOLD

The Clear Hold feature of XERA® POS allows the user to remove a hold that was previously placed on an order. In the case of a manual hold, the hold may be released at any time; however,

in the case of a hold for a finite amount of time, the hold may only be cleared manually before it expires automatically.

To clear the hold time from an order, select the order so that it appears on the smart check and then select the *Misc* button. Next, click the *Order Tasks* button and then click the *Clear Hold* button. The hold on the selected order is cleared and the order is sent to the kitchen the next time the user clicks the *Done* button.

PICKUP NAME

The Pickup Name feature allows the user to add a table tent number or customer name to an existing order. A table tent is a numbered sign that is issued to the customer and placed at the edge of the table so that the person serving the customer's order knows where it belongs.

To use this feature, create a new order or recall an existing order so that it displays on the screen. Next, select the *Misc* button, the *Customer Tasks* button, and the *Pickup Name* button. To add a table tent number to the order, select the desired table tent number from those displayed on the Pickup Name screen.

Click the *OK* button to close the Pickup Name screen and return to the Order Entry screen (See Figure 39-95).

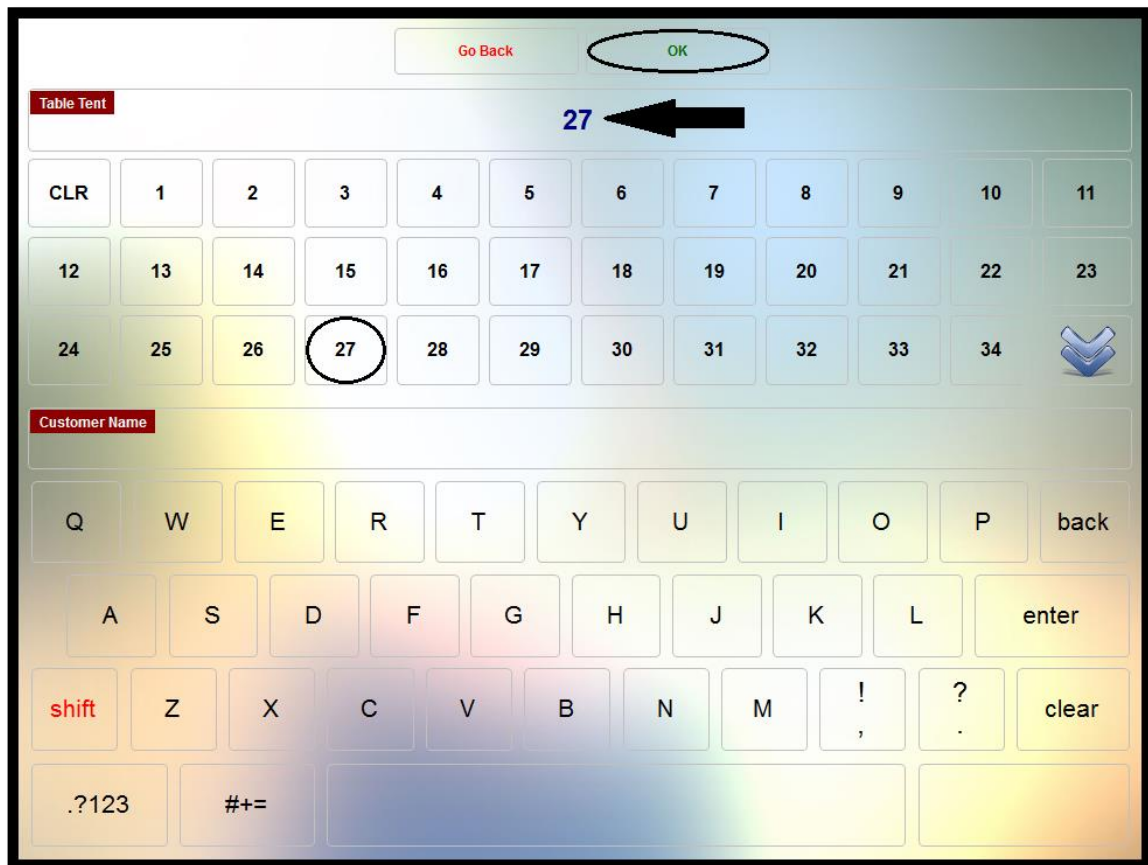


Figure 39-95

The selected table tent number now displays at the bottom of the smart check.

To add a customer name to the order, enter the customer name via the virtual alpha-numeric keyboard at the bottom of the Pickup Name screen. Click the *OK* button to close the Pickup Name screen and return to the Order Entry screen (See Figure 39-96).

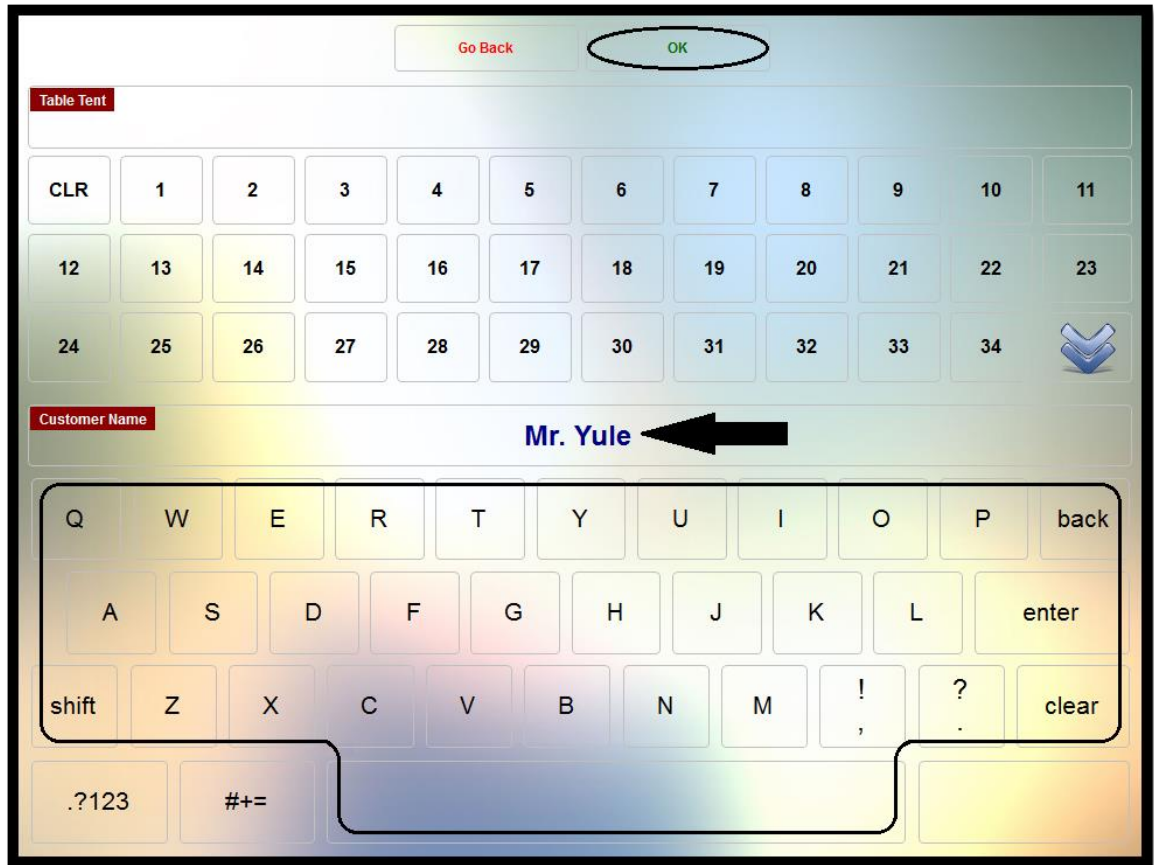


Figure 39-96

To change an existing table tent number or customer name, select the *Pickup Name* button again to display the Update Pickup Customer Name screen. Select the *YES ... Update Pickup Customer Name for This Order* button if you wish to change the existing table tent number or customer name (See Figure 39-97).

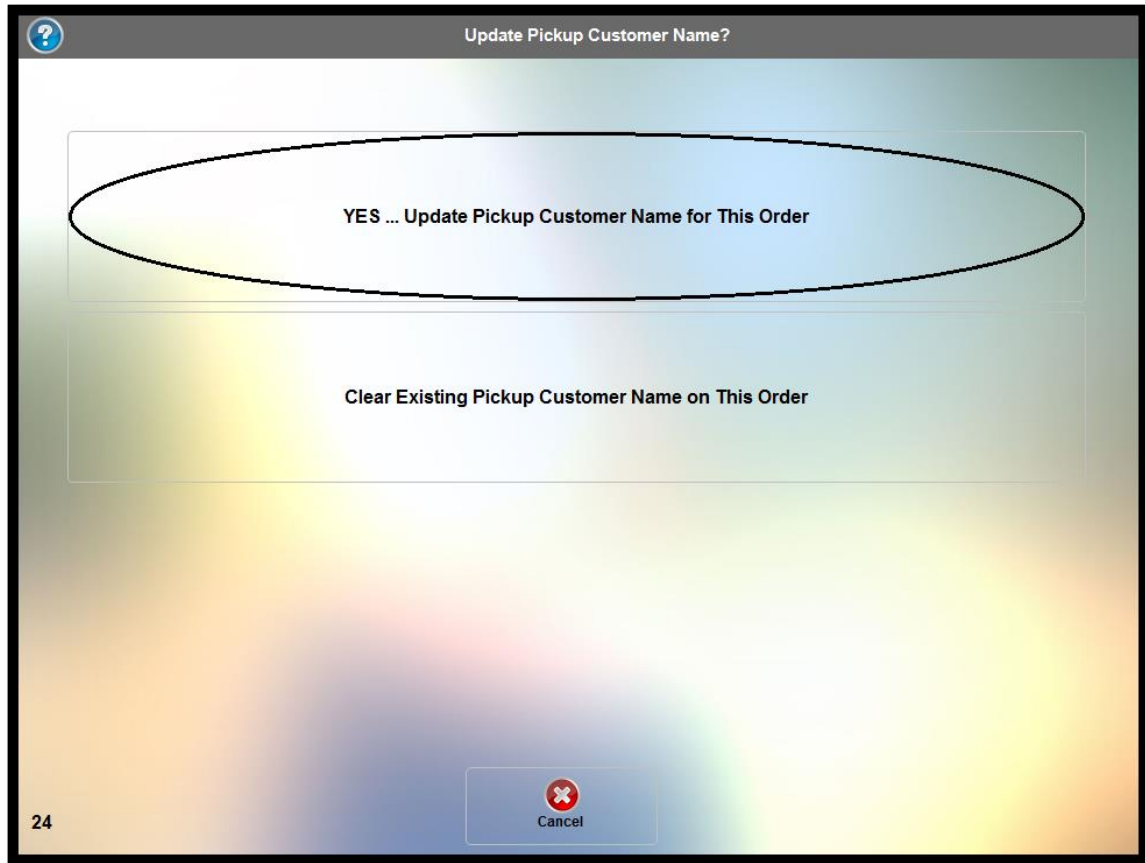


Figure 39-97

Enter the updated information and then click the *OK* button to return to the Order Entry screen.

Please note that if both a table tent number and a customer name are entered, they are both added to the guest check, separated by an underscore character. Select the *Clear Existing Pickup Customer Name on This Order* button if you wish to delete the information entered previously and start over. Enter the new information and then click the *OK* button to return to the Order Entry screen. The table tent number and/or the customer name now appear(s) at the bottom of the guest check.

Please also note that table tent numbers may not be added to orders unless the Table Tent feature is setup properly in the XERA® POS Manager application. Please see the XERA® POS Manager Manual for further information.

VOID ORDER

The Void Order feature allows the user to void any order that has not yet had any full or partial payments applied to it. To void an order, recall it, click the *Misc* button, and then click the *Void Order* button.

The Select Void Reason screen displays. Select the appropriate reason that the order is being voided by clicking on its respective button (See Figure 39-98).

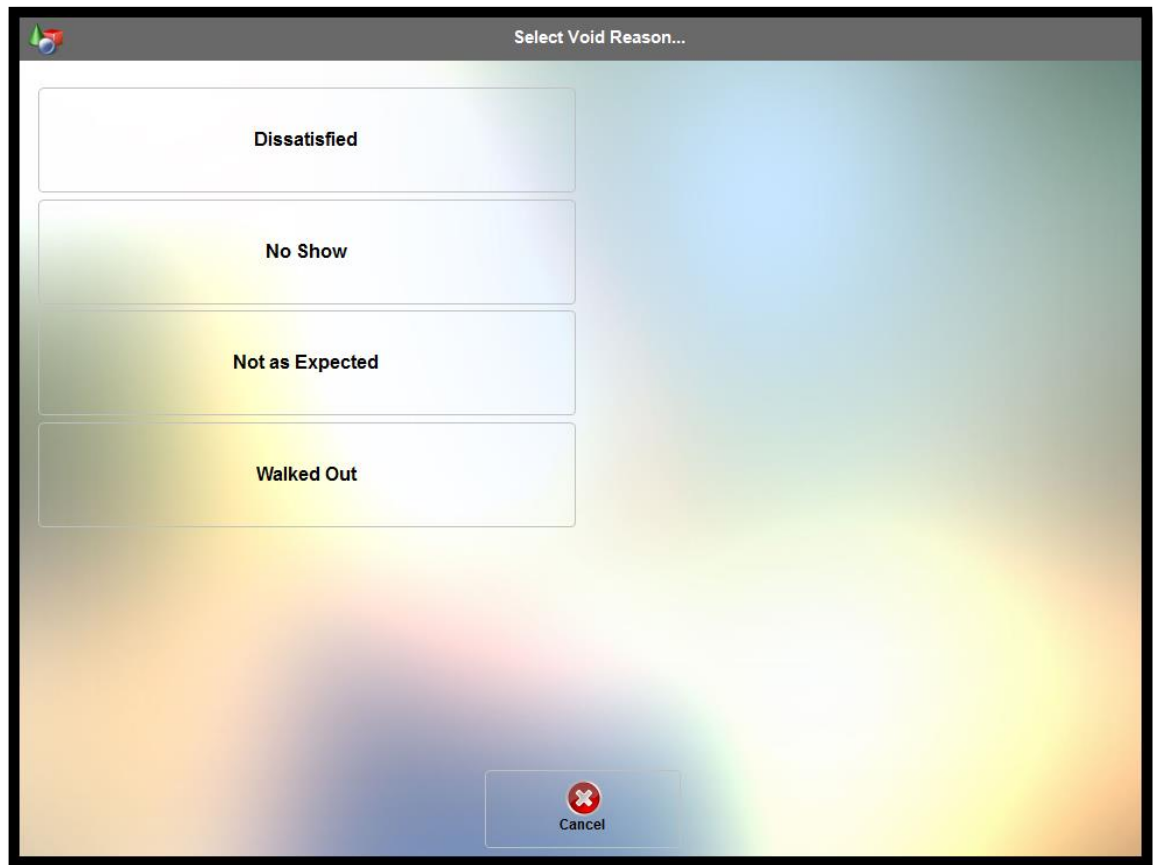


Figure 39-98

Upon selection of the void reason, the reason appears beneath each menu item and “Order Voided” displays on the background of the smart check. The void is now complete.

Please note that void reasons are user-defined and are setup in the XERA® POS Manager application by navigating to **Company Tab > Operations > Void Reasons**. Please see the XERA® POS Manager Manual for information on creating void reasons.

RETURN

The Return feature of XERA® POS allows the user to accept returns from customers for items from guest checks that have already been settled, for the purpose of refunding their money. This feature is typically used more often in a retail environment than in a restaurant environment.

To use the Return feature, the user enters the items that the customer is returning into the POS system, just as though the customer was making a purchase. When all of the items being returned have been entered, click the *Misc* button.

Next, click the *Order Tasks* button and then click the *Return* button to display the Return Order Confirmation screen. Click the *YES ... Mark This Order as Return* button to continue with the return (See Figure 39-99).

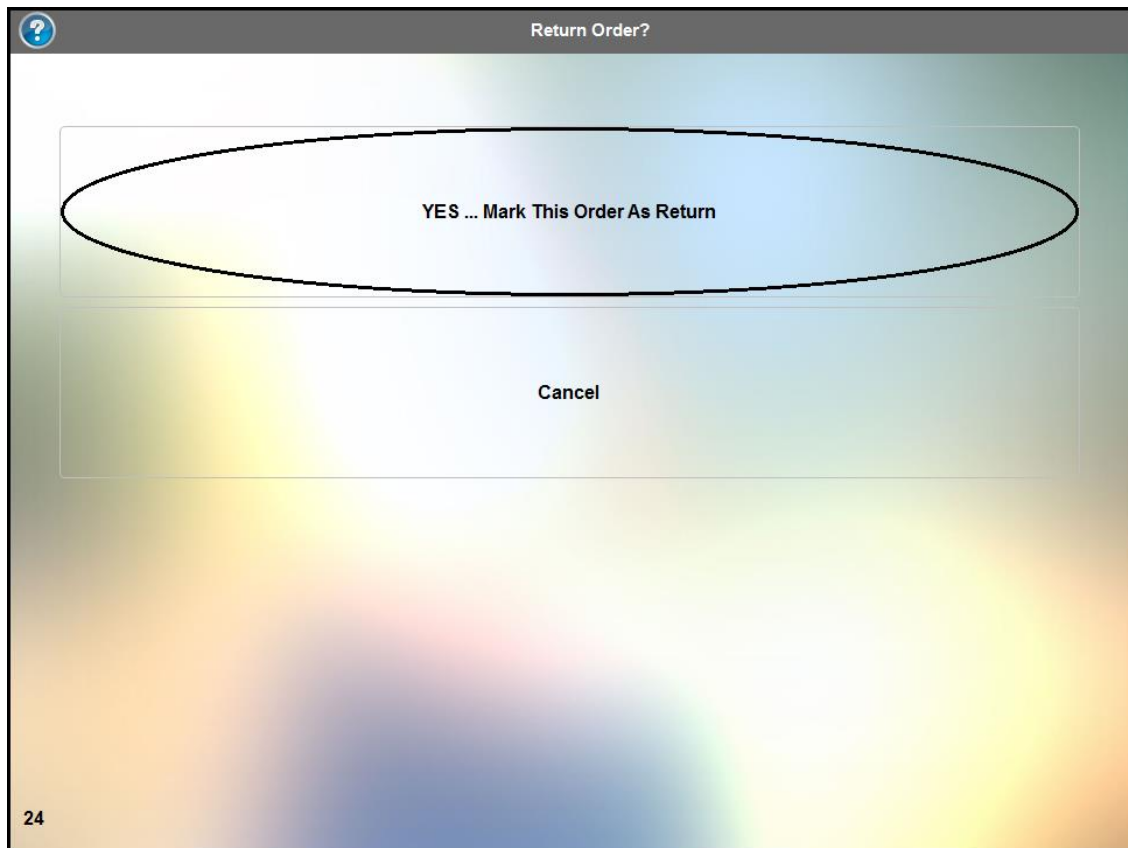


Figure 39-99

Beneath each item on the guest check, “XX RETURN XX” displays and the price of the item becomes a credit amount rather than a debit amount. The user may then settle the order by any cash or credit card tender type available to refund the customer.

An alternative way to create a return is to start a new order, select the *Misc* button, and then select the *Return* button before entering the items onto the guest check. Then, as each item is added to the guest check, it appears with “XX RETURN XX” already displayed beneath it and a credit amount in the column on the right side of the guest check. When all of the items have

been entered, the user may then settle the order by any cash or credit tender type available to refund the customer.

Please note that only the entire order may be returned; you cannot create an order where only some but not all of the items on the order are being returned.

GUESTS

The Guests feature allows the user to enter the number of guests that are in the guest party. This information displays on both the smart check and the customer receipt.

To enter the number of guests, select the *Misc* button and then click the *Guests* button. A virtual numeric keypad displays at the bottom of the smart check. Enter the number of guests via this virtual keypad and then select the keypad's *Enter* button.

The number of guests entered appears at the top of the guest check (See Figure 39-100).

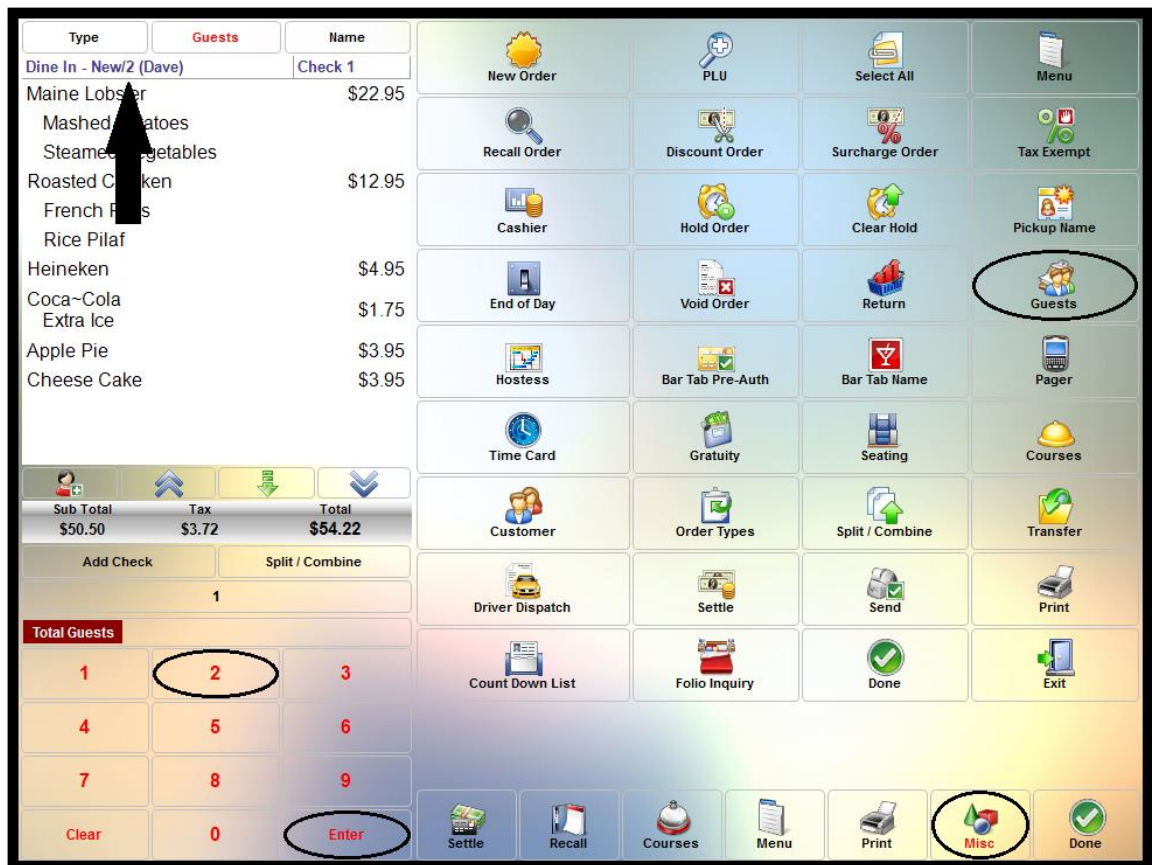


Figure 39-100

BAR TAB PRE-AUTH

The Bar Tab Pre-Auth feature allows the user to pre-authorize the customer's credit card for a specific monetary amount. The customer may then run a bar tab and make purchases up to this pre-authorized amount without the need to settle his tab after each round of purchases.

Upon meeting or exceeding the pre-authorized amount, the customer is required to settle his tab. At this point, the customer's credit card may be pre-authorized again, if desired, to make additional purchases.

To create a pre-authorized bar tab, recall an existing order or create a new order and then click the *Bar Tab Pre-Auth* button to display the Enter Bar Tab Name or Swipe Card screen. Use the virtual keyboard to enter the customer's name and click the *Enter* button (See Figure 39-101).

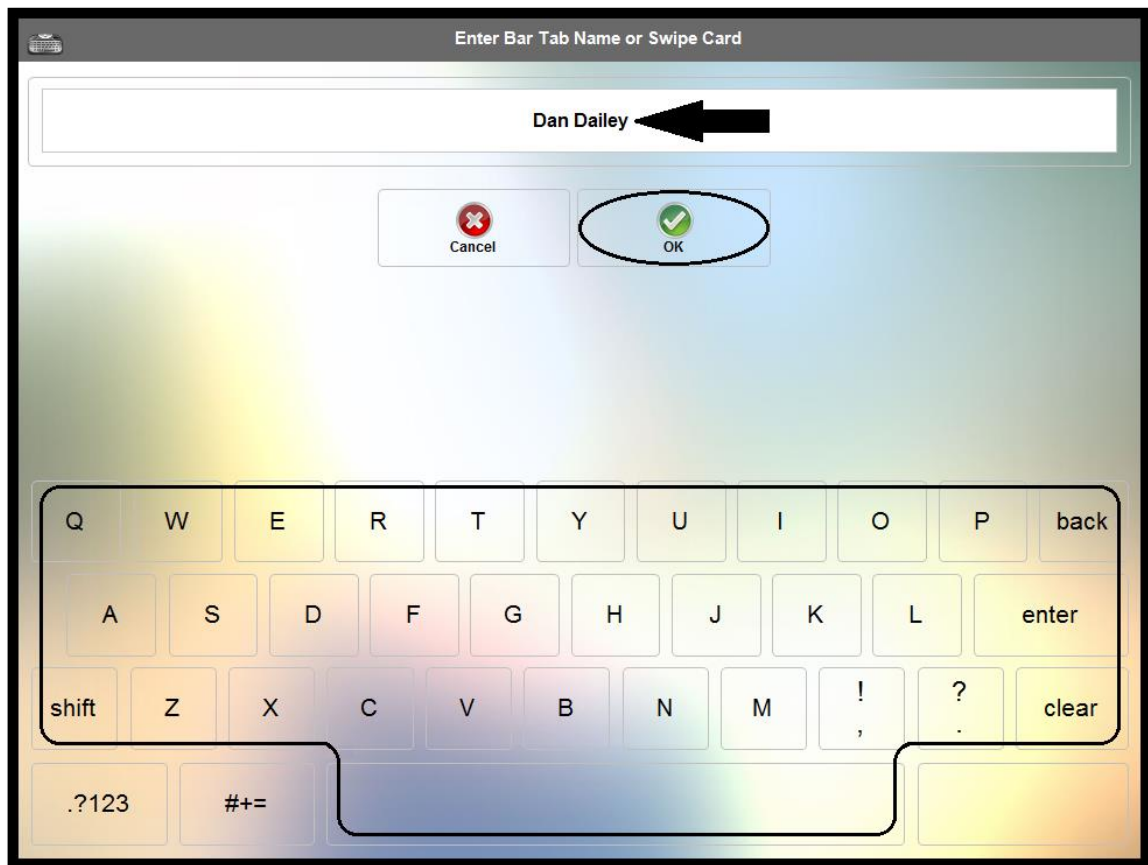


Figure 39-101

Alternatively, simply swipe the customer's credit card through the MSR (Magnetic Stripe Reader) device to skip the step above and display the Aldelo[®] EDC screen with the required information populated on the screen. Click the *Process* button to continue (See Figure 39-102).

The screenshot displays the Aldelo EDC interface. At the top, there are two buttons: "Go Back" (red) and "Process" (green, circled). Below the buttons, the card information is displayed: "Mastercard: XXXX-XXXX-XXXX-XXXX" (with a red bar over the numbers) and "Payment Card Account Number". To the right, there are fields for "Cardholder First Name" and "Cardholder Last Name". Below these are fields for "Expire Month" (with a "12" indicator) and "Expire Year" (with a "XX" indicator), each with up and down arrow controls. Further down are fields for "Card Verification Code" and "CVV Presence" (with up and down arrow controls). To the right of these are fields for "AVS Address", "AVS Zip Code", and "Voice Authorization Code". At the bottom of the screen is a numeric keypad with buttons for digits 1-0, a "back" button, and a "clear" button. There are also buttons for symbols like "-", "/", ":", ";", "(", ")", "\$", "&", "@", and "enter".

Figure 39-102

The Enter Bar Tab Pre-Auth Custom Amount screen appears. Use the virtual keypad to enter the desired amount for which to pre-authorize the customer's credit card. Click the Enter button to continue (See Figure 39-103).

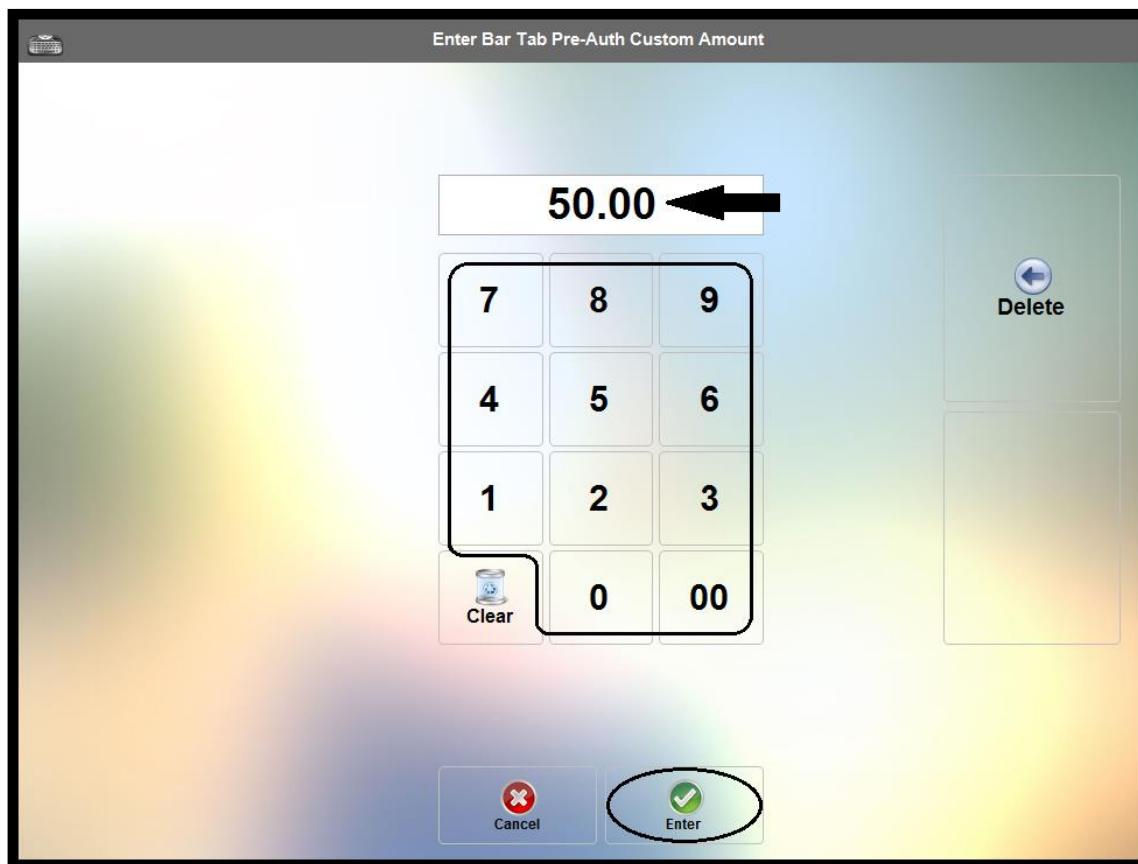


Figure 39-103

The customer's order is pre-authorized for the amount entered in the previous step, above. The smart check that appears on the screen shows the payment method chosen by the customer and the pre-authorized balance. At this point, the user may begin entering the customer's selected menu items as usual (See Figure 39-104).

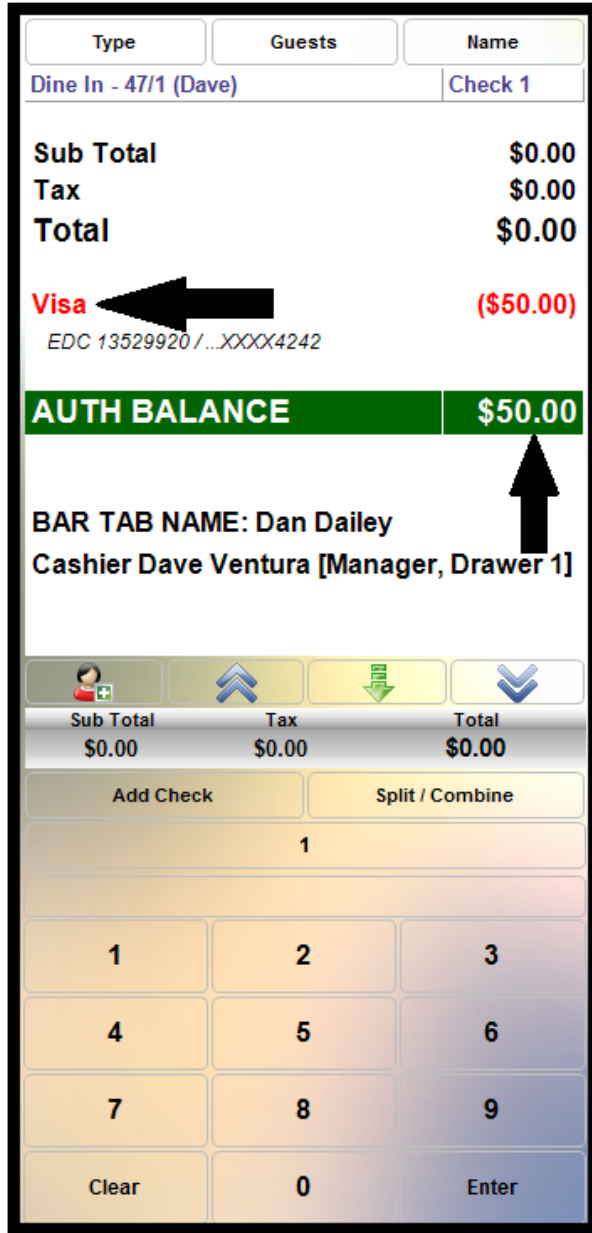


Figure 39-104

(**Please note:** The Bar Tab Pre-Auth feature must have been setup previously in the XERA® POS Manager application before a pre-auth transaction may be performed. See the XERA® POS Manager Manual for detailed instructions.)

BAR TAB NAME

The Bar Tab Name feature allows the user to enter a name that is attached to the current order under which a bar tab is created.

From the Order Entry screen, click the *Misc* button and then click the *Bar Tab Name* button. The Enter Bar Tab Name window displays as a virtual keyboard. Enter the name to assign to the bar tab via this keyboard and then click the *OK* button (See Figure 39-105).

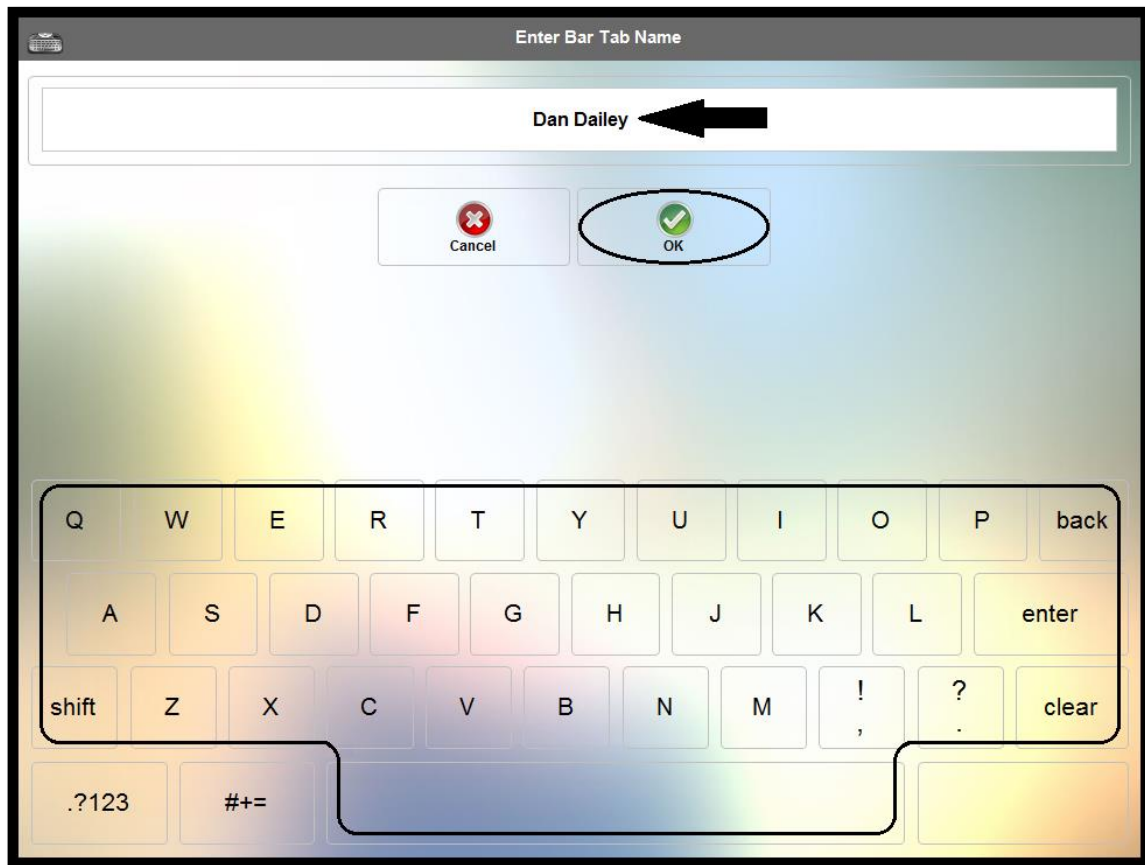


Figure 39-105

The display returns to the Order Entry screen and the name entered automatically appears at the bottom of the guest check (See Figure 39-106).

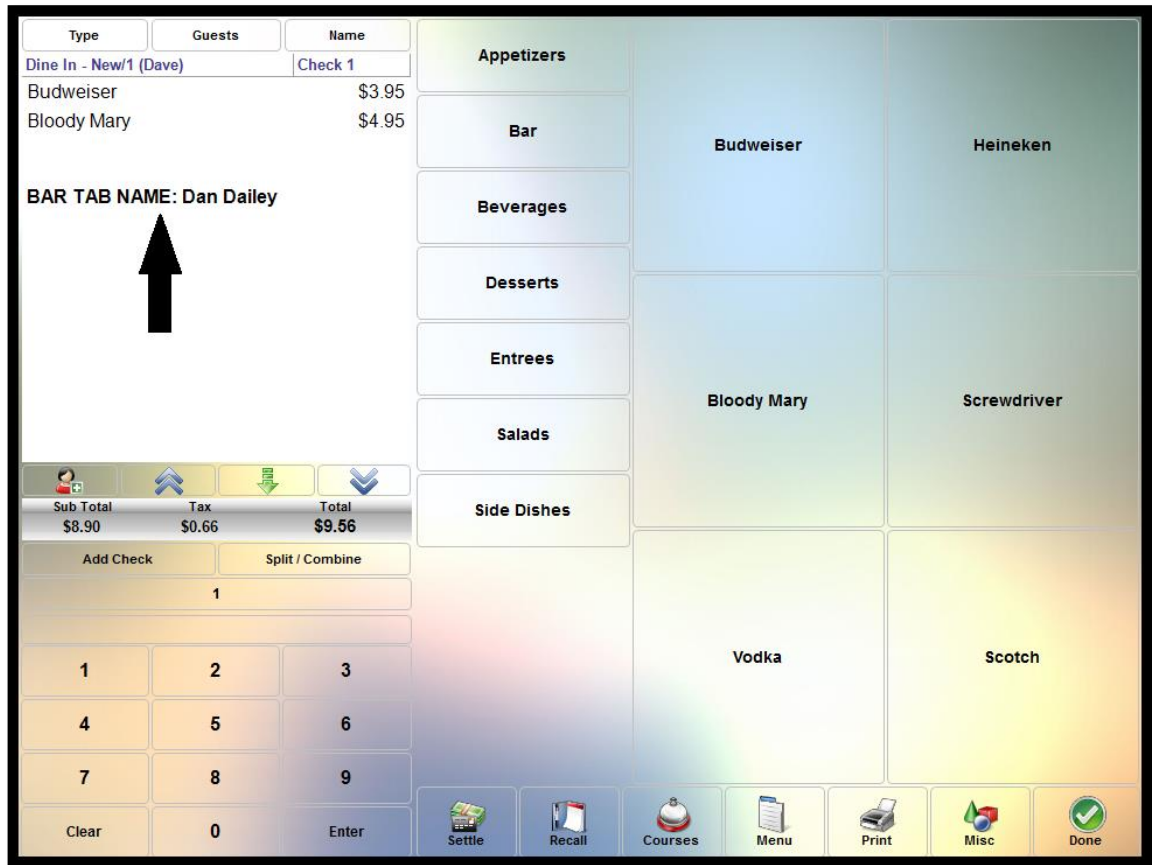


Figure 39-106

PAGER

Reserved for future use.

GRATUITY

The Gratuity feature allows the user to apply a gratuity to the customer’s order. The available gratuities are user-defined and are setup in advance in the XERA® POS Manager application as gratuity surcharge types.

To apply a gratuity to an order, create a new order or recall an existing order. Next, click the *Misc* button, click the *Table Service Tasks* button, and then click the *Gratuity* button to display the gratuities that were setup previously in the XERA® POS Manager application. Select the desired gratuity by clicking on its respective button.

Please note that only one gratuity may be applied to an order. If the user attempts to apply a second gratuity of any type, then the subsequent gratuity automatically replaces the previous gratuity.

Percent Type Gratuity

If the selected gratuity is of the percent type, then the predetermined gratuity percentage amount is displayed at the bottom of the guest check and automatically added to the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

Fixed Amount Type Gratuity

If the selected gratuity is of the fixed amount type, then the predetermined fixed gratuity amount is displayed at the bottom of the guest check and automatically added to the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

Open Amount Type Gratuity

If the selected gratuity surcharge is of the open amount type, then a virtual numeric keypad displays beneath the smart check. Enter the desired monetary amount of the gratuity via this keypad and then click the keypad's *Enter* button to apply the gratuity to the order. The entered gratuity amount is displayed at the bottom of the guest check and automatically added to the guest check total. The display then returns to the Order Entry screen where the user may continue with the order as usual.

SEATING

The *Seating* button allows the user to access the Seating feature of XERA® POS. The functionality of the Seating feature depends on the Show Visual Floor Plan setting entered for the selected order type in the XERA® POS Manager application. This setting may be edited in the XERA® POS Manager application by navigating to **Company Tab > Operations > Order Types**, clicking the *List* Tab, and then double-clicking on the desired order type. Next, click on the *Settings 1* Tab. Here you may select or deselect the *Show Visual Floor Plan* checkbox. Please note that the *Show Visual Floor Plan* checkbox is disabled unless the *Is Dine In Service* checkbox is selected.

If the *Show Visual Floor Plan* checkbox is not checked for the selected order type, then clicking the Seating button during order entry displays the Enter Pickup Customer Name window. Enter the customer's name via the virtual keyboard and click the *OK* button on the keyboard to add the customer name to the smart check (See Figure 39-107).

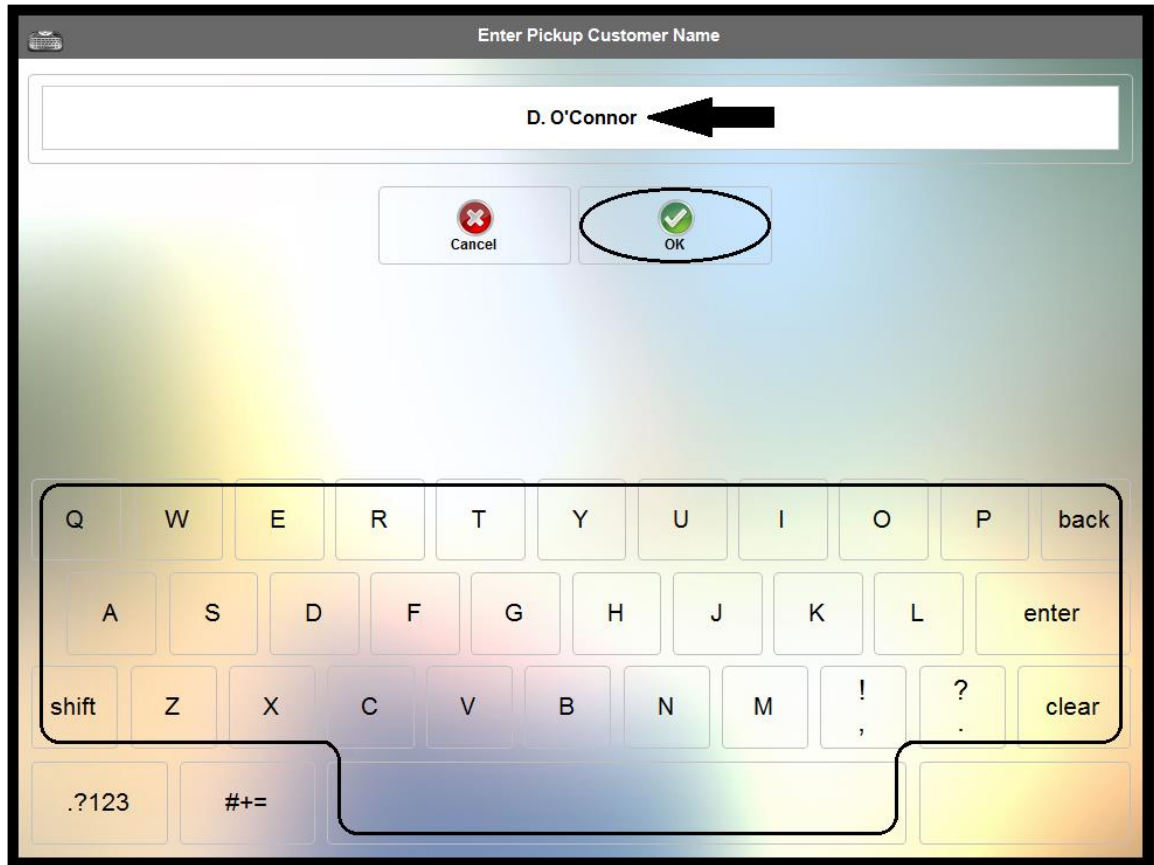


Figure 39-107

If the *Show Visual Floor Plan* checkbox is checked for the selected order type, then clicking the Seating button displays the visual floor plan where the user must select a table for the guest party. If this is the case, follow the instructions on using the Hostess features on page 398 of this manual.

COURSES

The *Courses* button allows the user to group the customers' meals into several different courses. Courses may be assigned manually or automatically. To assign courses to menu items, follow the steps listed under the chapter titled Courses on page 339 of this manual.

ORDER TYPES

Select the *Order Types* button to display the Order Type Selection screen. Here the user may select from the various order types that were created in the XERA® POS Manager application.

To select an order type, simply click the order type's respective button (See Figure 39-108).

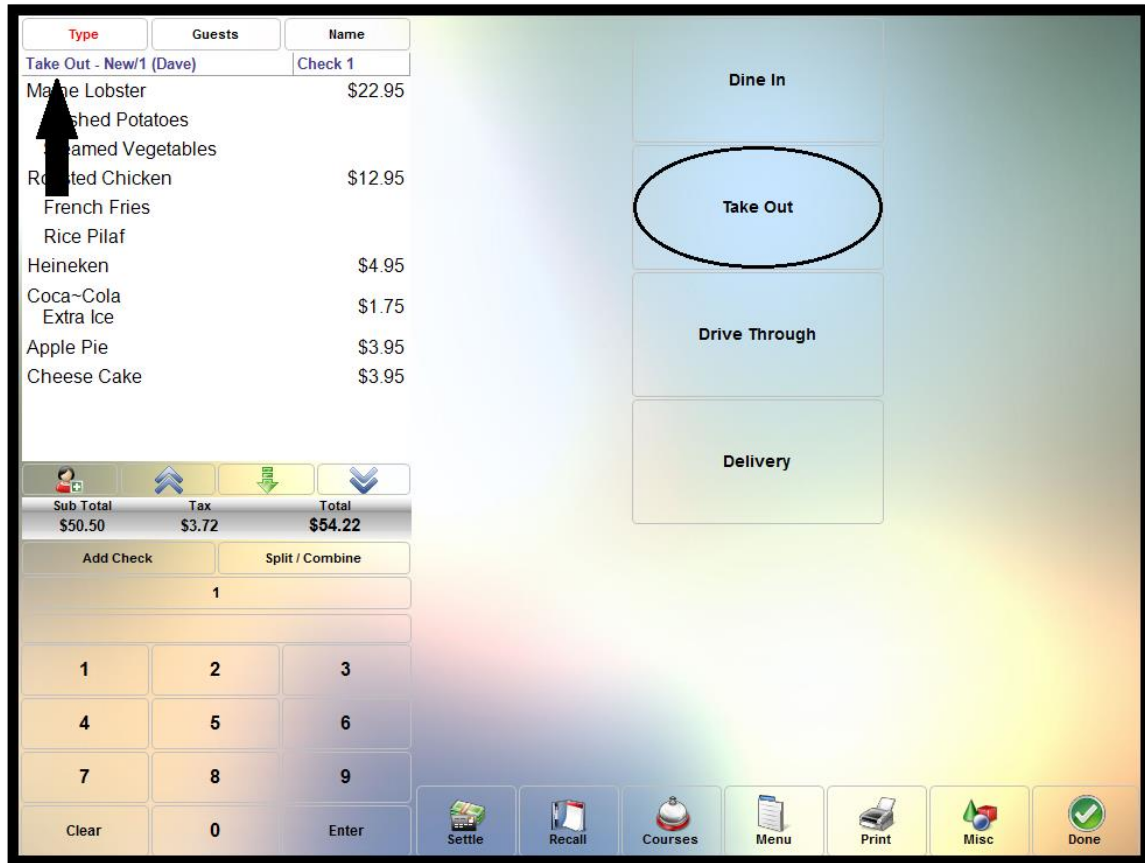


Figure 39-108

Order types are user defined and are created in the XERA® POS Manager application by navigating to **Company Tab > Operations > Order Types** and then clicking the *New* button to display the Order Types - [Add New Record] screen.

SPLIT/COMBINE

The *Split/Combine* button has a dual purpose. It is used to split an existing order where the menu items are assigned to multiple guests and it is also used to reverse such a split and combine a previously split order into a single order again.

Splitting an Order

To split an order, the menu items on the order must be assigned to two or more guests.

To create an order with multiple guests, first select the *New Order* button. Next, select the order type and the desired menu. Before adding the first menu item to the order, click the *Add Guest* button on the left side of the smart check window to create the first guest (see Figure 39-109).

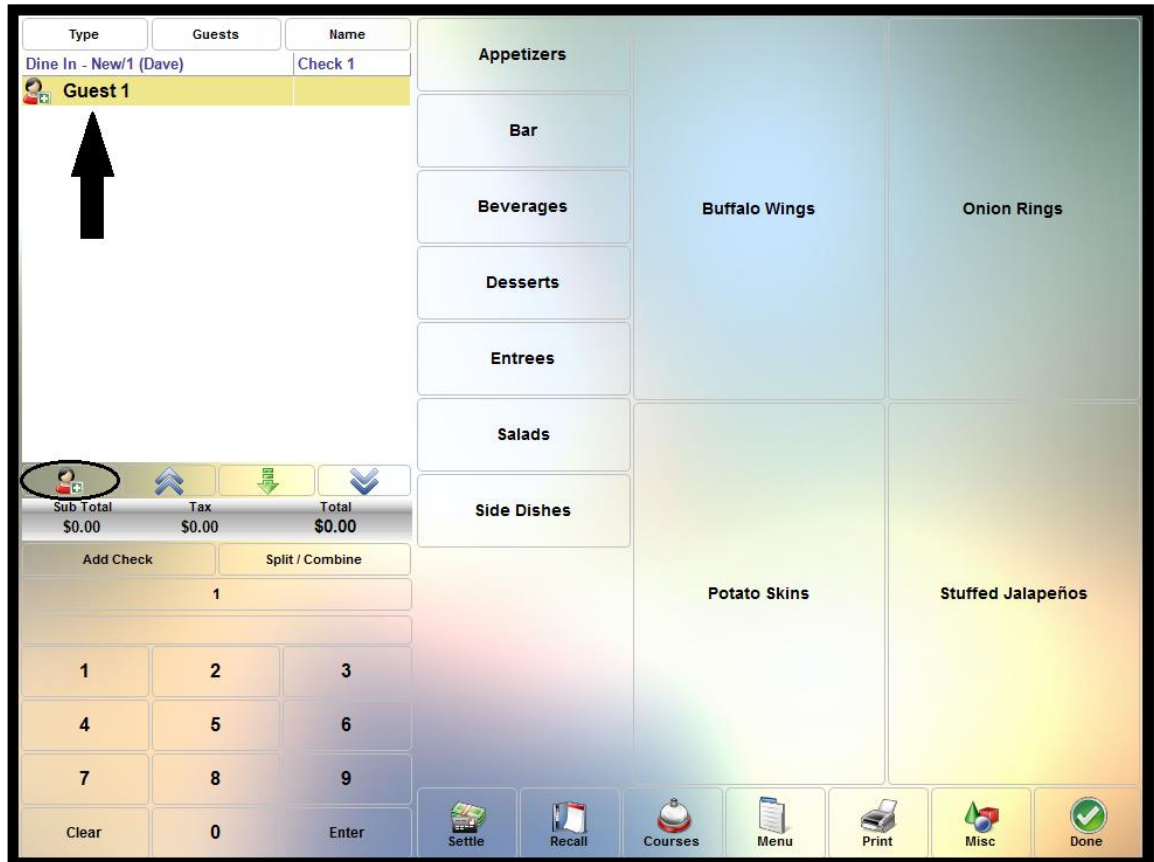


Figure 39-109

Enter the first guest's desired menu items. When finished, click the *Add Guest* button again and enter the second guest's menu items. Repeat this procedure for each member of the guest party until all of the guests' orders have been entered (See Figure 39-110).

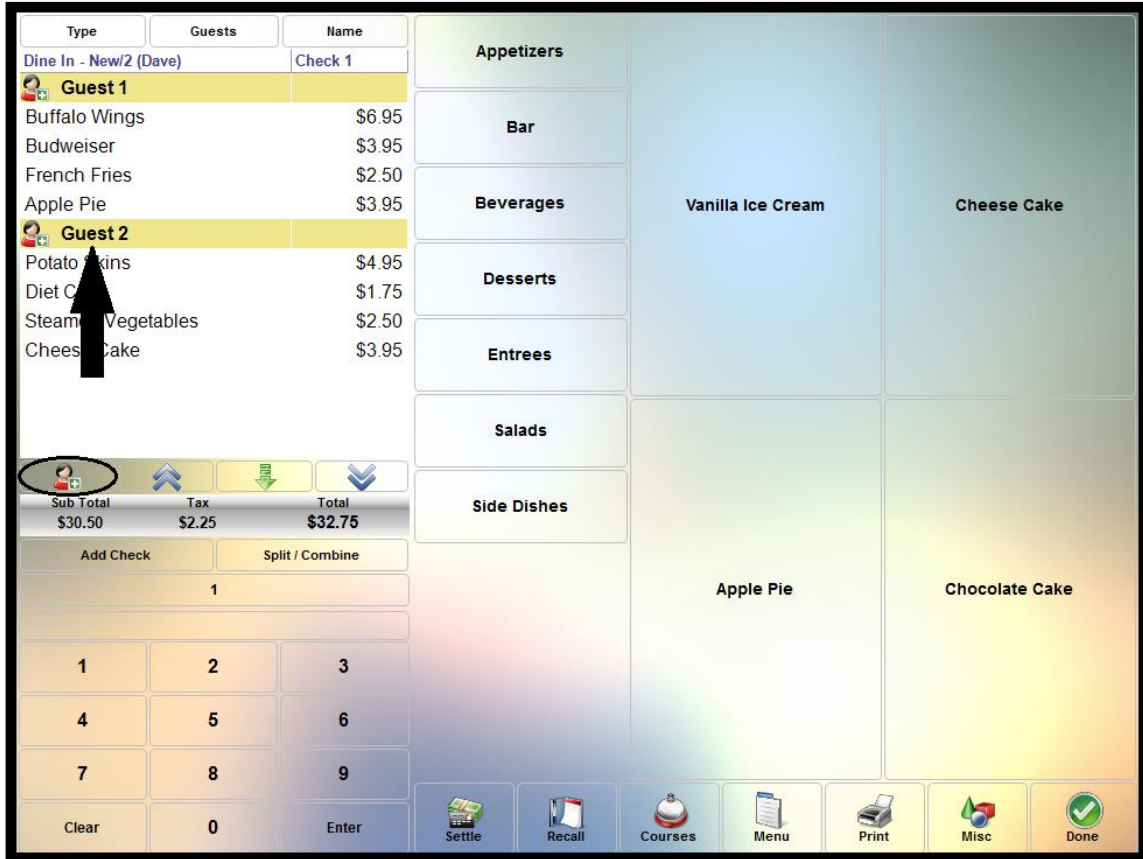


Figure 39-110

Finally, click the *Misc* button and the *Split/Combine* button to split the order. An additional order is created for each additional guest on the guest check. Each has a unique order number and each check is numbered in sequence (See Figure 39-111).



Figure 39-111

Combining Orders

Only orders that were previously a single order and were split into multiple orders may be combined into a single order again.

To combine orders, recall any of the orders that were a part of the original order before the split. Click the *Split/Combine* button to merge the orders into a single order again.

TRANSFER

The Transfer feature allows the user to transfer any of his guest orders to a different employee. This feature is typically used when a wait staff employee's shift ends. All guest orders must be settled or transferred to another employee before the employee is allowed to clock out at the end of his shift.

Click the *Transfer* button to access the features that allow the transfer of guest checks from one employee to another.

Current Check

The *Current Check* button is used to transfer a single check (from an order that is comprised of multiple checks) to another employee (the creation of multiple guest checks on a single order is covered previously in this manual).

To do so, recall the order that is comprised of the multiple checks so that it displays in the smart check panel on the left side of the screen. If both checks are combined and displayed on the screen as a single order, click the *Split/Combine* button on the left side of the screen to split the order into multiple checks (See Figure 39-112).

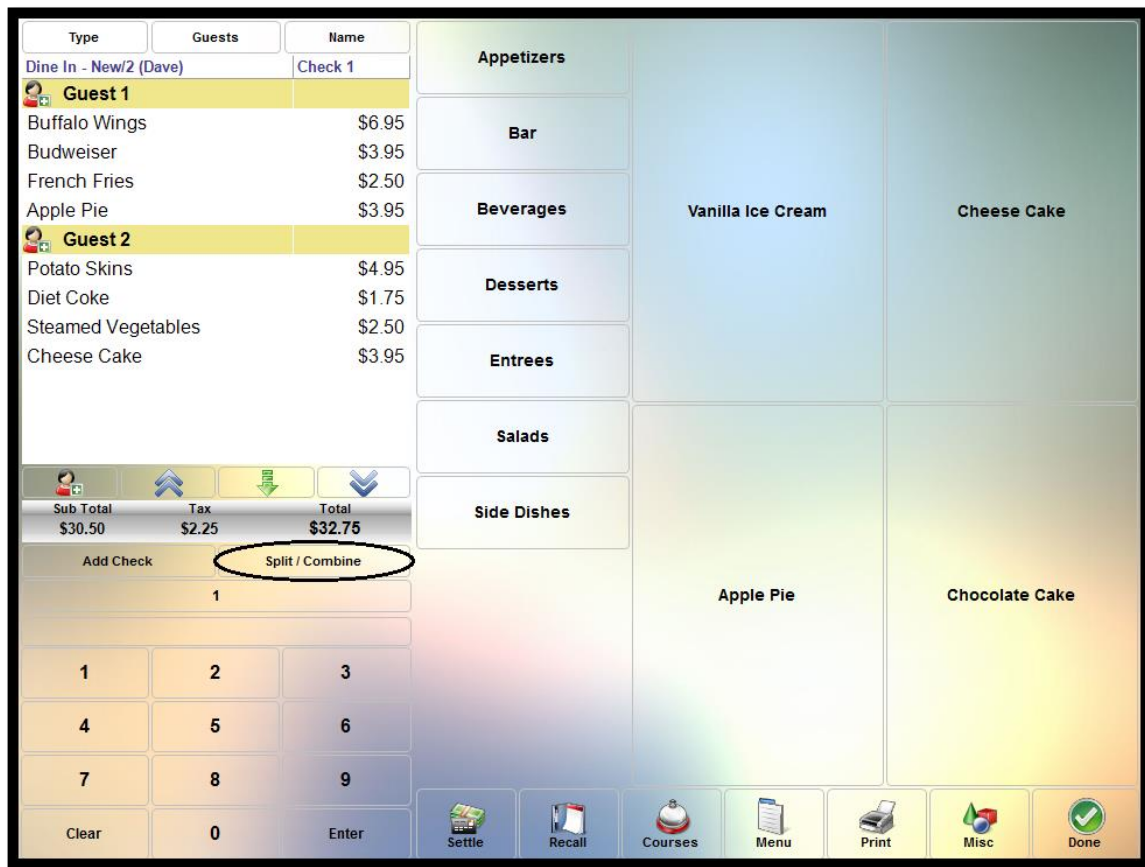


Figure 39-112

Once the checks are split, a series of buttons appears at the bottom of the screen; one button for each check. Select the desired check by clicking on its button to display it alone in the smart check panel (See Figure 39-113).

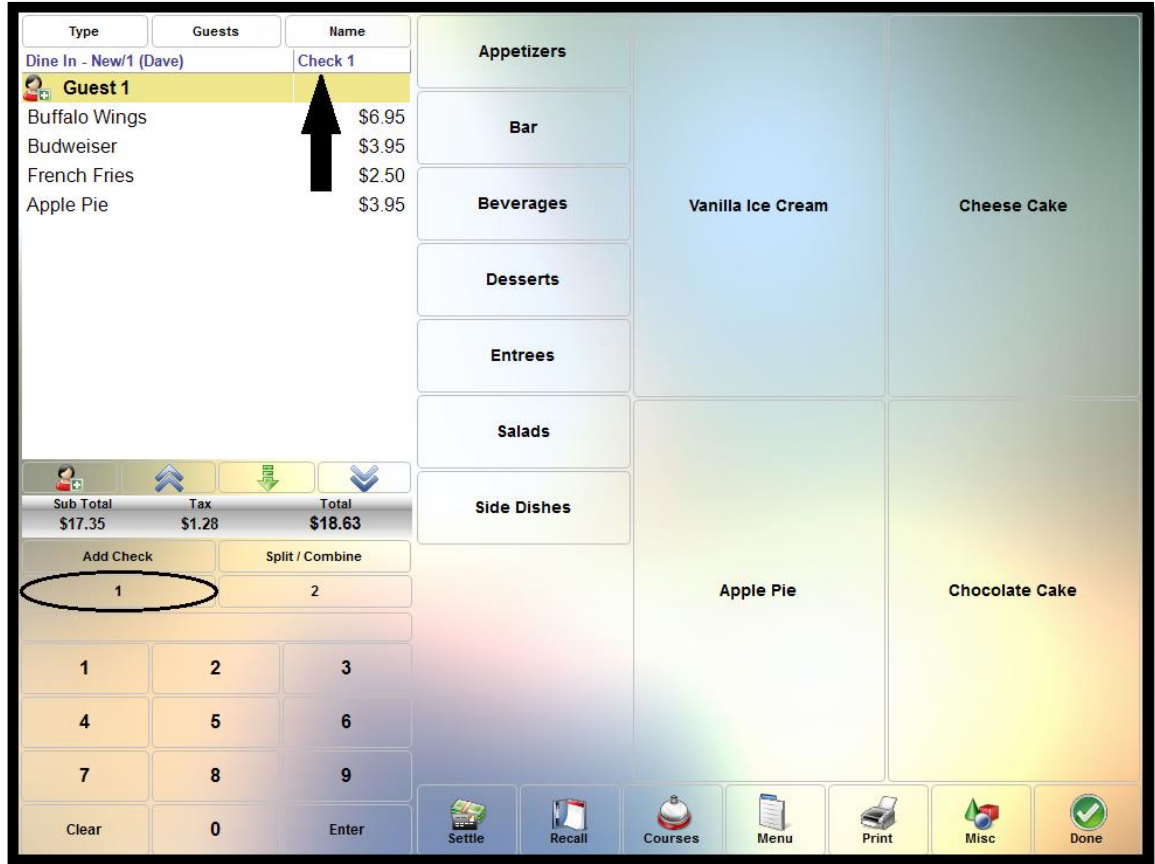


Figure 39-113

Next, click the *Misc* button, the *Transfer* button, and the *Current Check* button. Finally, click the *Transfer To:* button that corresponds with the employee to whom you wish to transfer the order (See Figure 39-114).

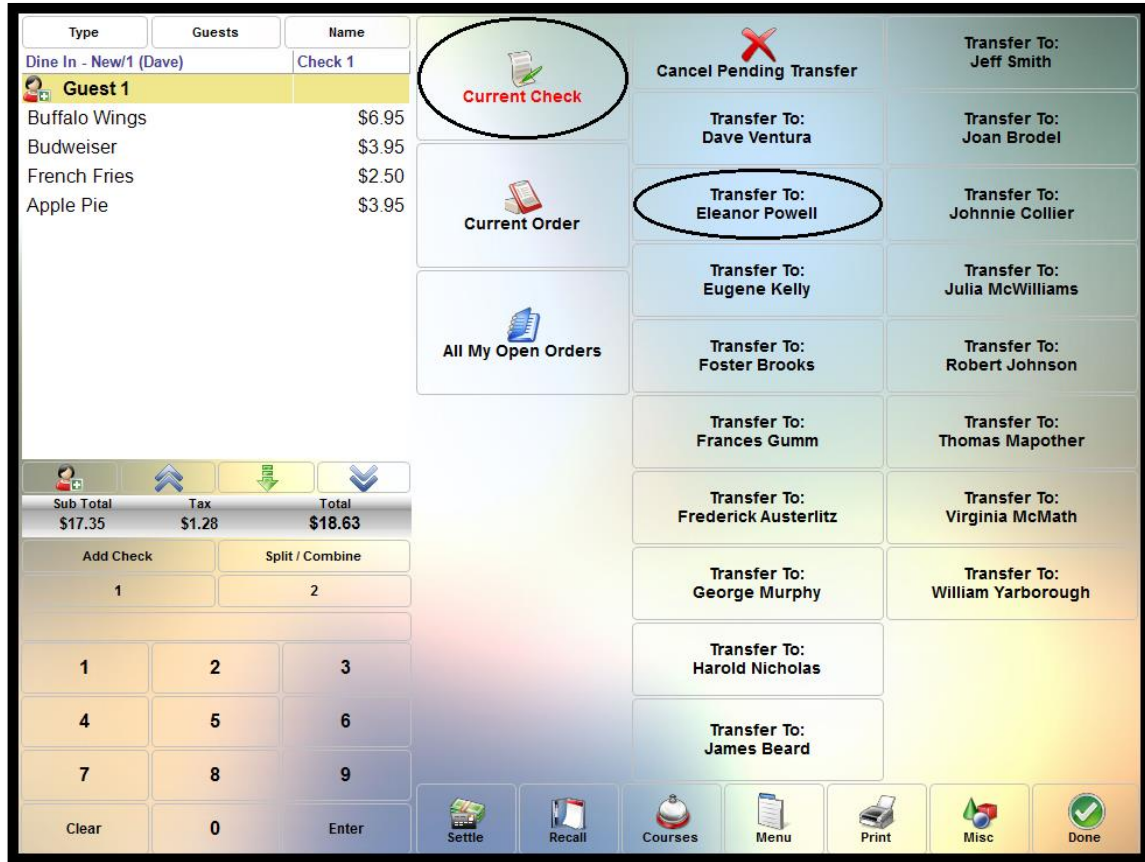


Figure 39-114

The transfer is now partially complete. Recalling the order above shows that the transfer is now pending acceptance by Eleanor Powell (See Figure 39-115).

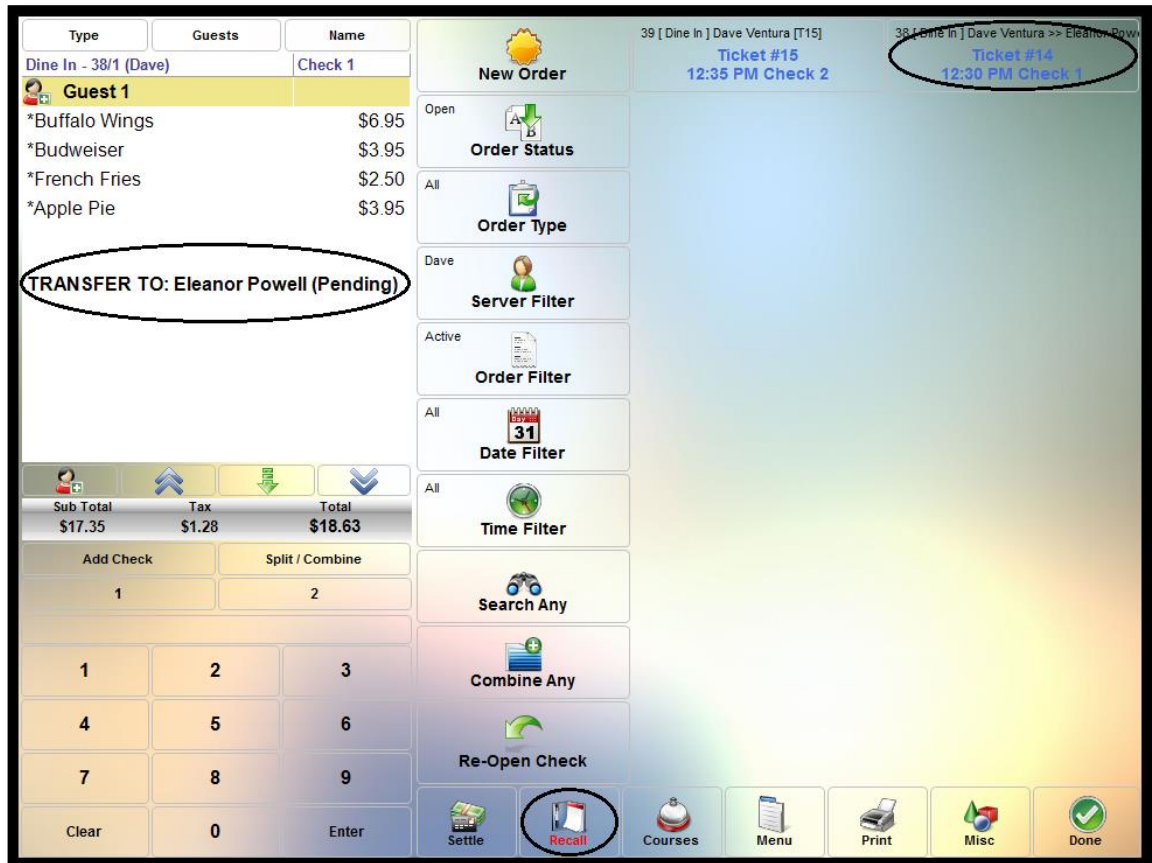


Figure 39-115

Current Order

The *Current Order* button is used to transfer a single order to another employee. If the order is comprised of multiple checks, then all of the checks attached to the order become a part of the transfer.

To transfer the current order, recall the order or any of its constituent checks (if the order is comprised of multiple checks) so that the order or check displays in the smart check panel on the left side of the screen. Next, click the *Transfer* button and the *Current Order* button. Finally, click the *Transfer To:* button that corresponds with the employee to whom you wish to transfer the order.

The transfer is now partially complete. Recalling the order shows that the transfer is now pending acceptance by the transferee.

All My Open Orders

The *All My Open Orders* button is used to transfer all of an employee's open orders to another employee.

To transfer the orders, recall any of the orders so that the order displays in the smart check panel on the left side of the screen. Next, click the *Order Tasks* button, the *Transfer* button, and the *All My Open Orders* button. Finally, click the *Transfer To:* button that corresponds with the employee to whom you wish to transfer the orders.

The transfer is now partially complete. Recalling any of the orders shows that the transfer is now pending acceptance by the transferee.

Acceptance or Rejection of Inbound Orders by the Transferee

If the transferee is not logged into the system when the transfer is attempted, he is prompted to review inbound transfers the next time he logs in. The employee may choose to review the transfers at that time or may choose to review the transfers at a later time by clicking the appropriate button on the Review Inbound Transfers window (See Figure 39-116).

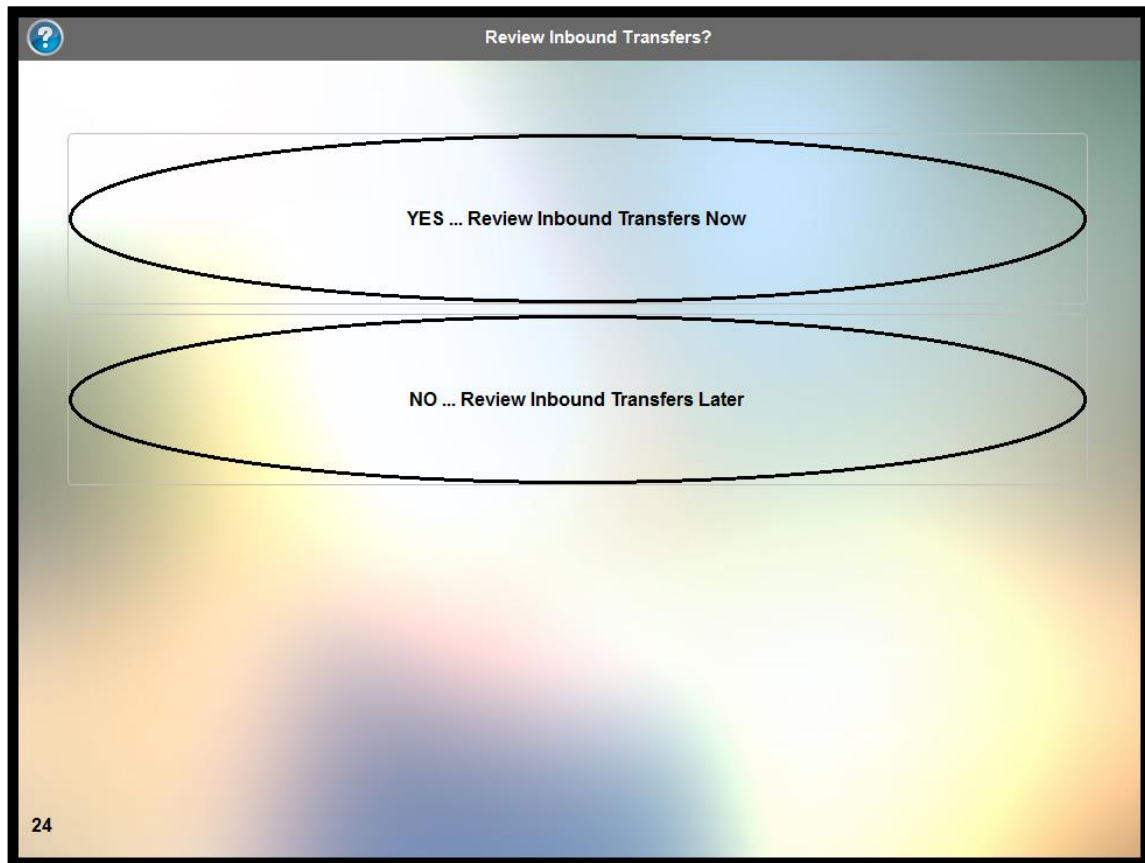


Figure 39-116

In either case, upon reviewing the list of inbound transfers, the user is prompted to accept or reject the inbound transfer. The user may choose to filter the transfer to include only the current check displayed on the screen, only the current order displayed on the screen (which includes all checks attached to that order), or all open orders.

Upon making the desired filter selection, the user then accepts or rejects the transfer by clicking on the appropriate button (See Figure 39-117).

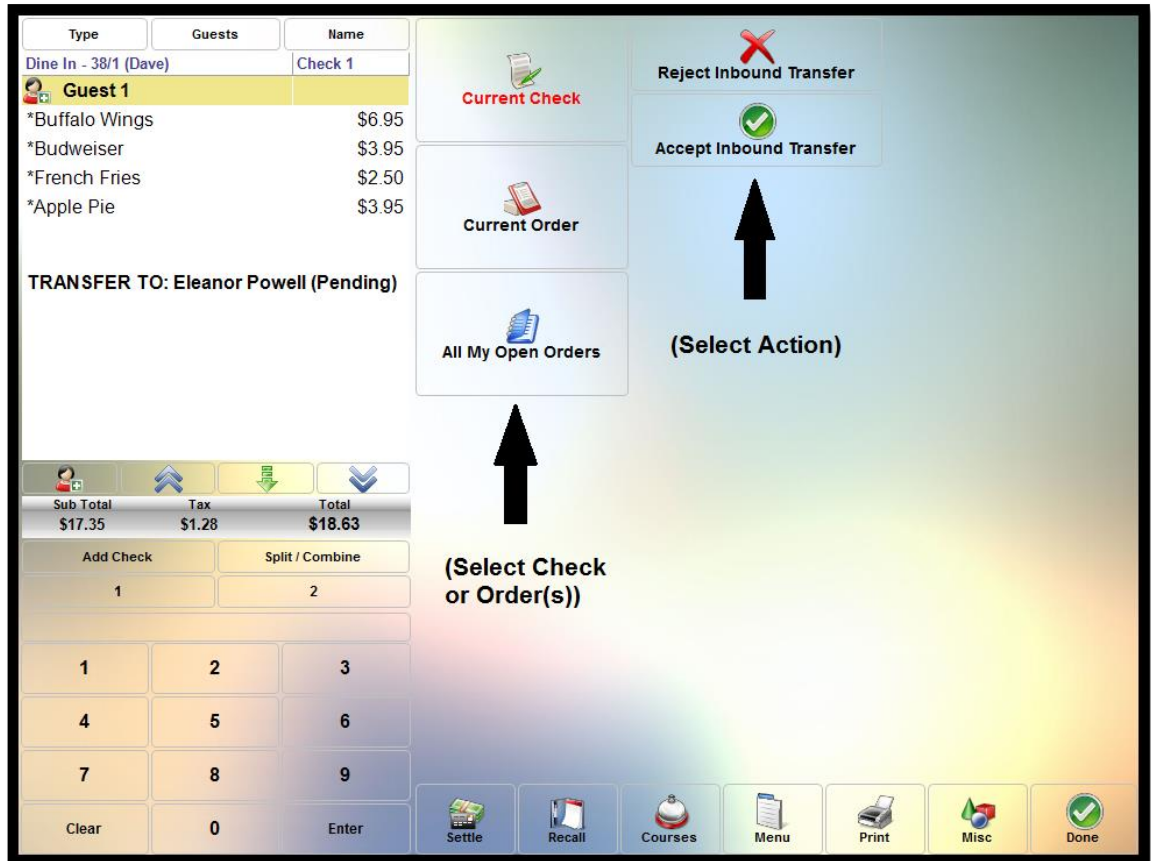


Figure 39-117

If the user accepts the transfer, the orders are removed from the transferor's list of orders, added to the transferee's list of orders, and the transfer is complete. If the user rejects the transfer, then the transfer is cancelled and the orders no longer show as pending transfer in the transferor's list of orders.

Cancel Pending Transfer

If the transferor changes his mind and wishes to cancel a pending transfer, it may be accomplished at any time up until the transferee accepts the transfer.

To do so, recall any of the checks or orders that are a part of the transfer, click the *Misc* button, the *Order Tasks* button, and the *Transfer* button, and then select the appropriate filter. The pending transfers of the currently displayed check, the currently displayed order, or all open orders may be cancelled.

Finally, click the *Cancel Pending Transfer* button (See Figure 39-118).

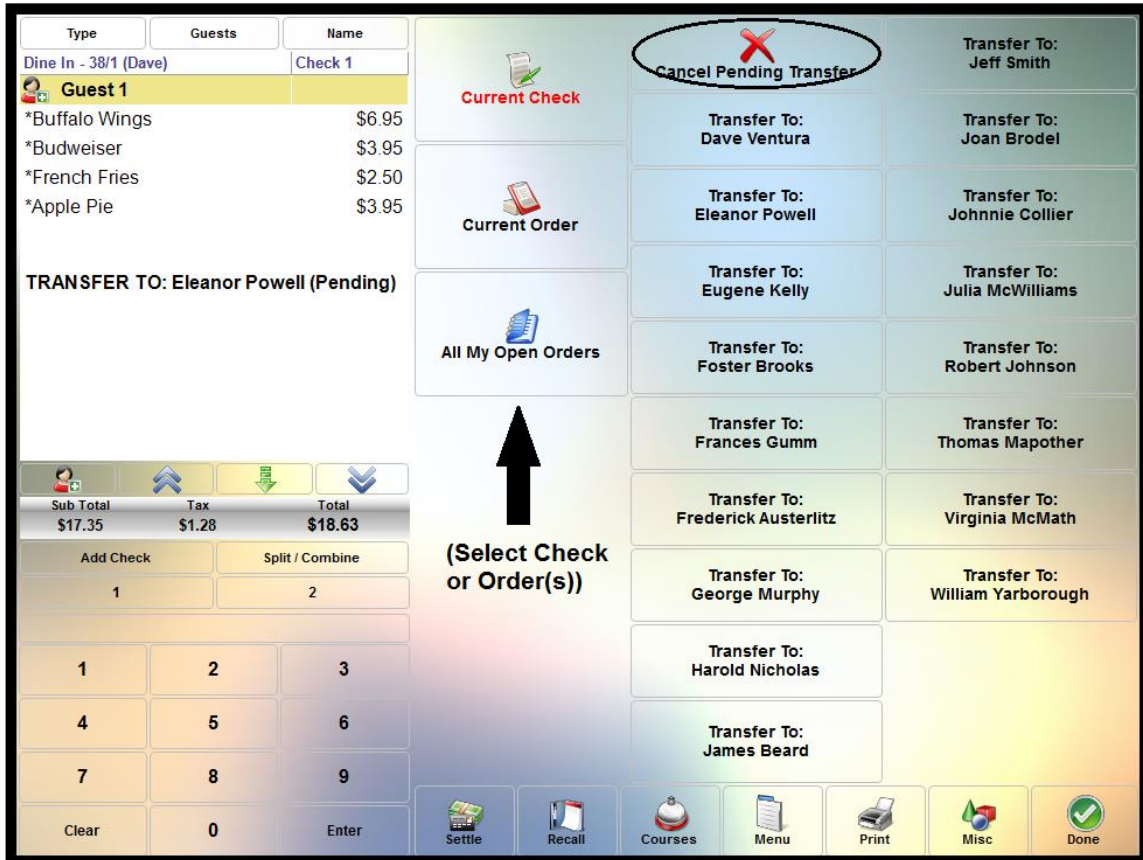


Figure 39-118

Now, if the transferee recalls the above order, the transfer pending message no longer displays on the order in the smart check panel, indicating that the cancellation of the transfer is successful (See Figure 39-119).

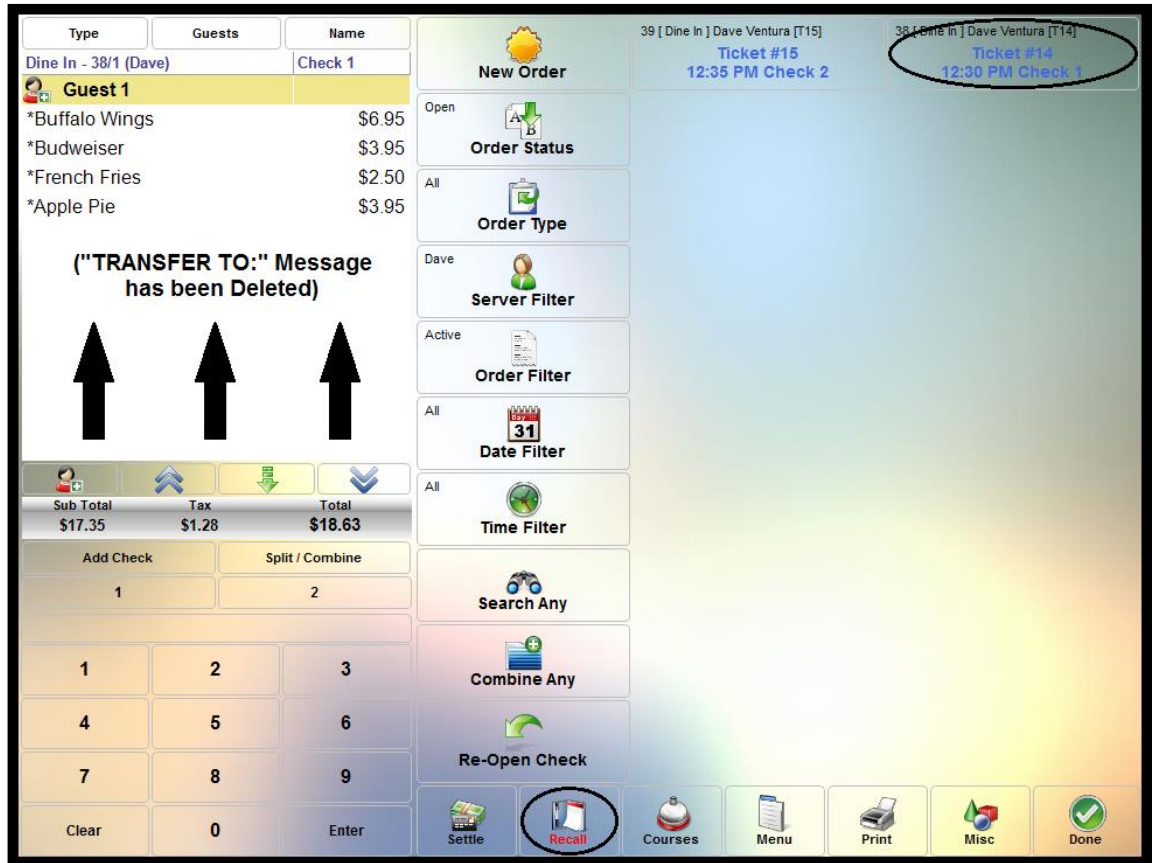


Figure 39-119

SETTLE

Select the *Settle* button when the customer is ready to pay for his order. To continue settling an order, follow the steps listed under the chapter titled Settle on page 333 of this manual.

SEND

The Send feature of XERA® POS allows the user to send to the kitchen the menu items that have been ordered thus far, while keeping the order open to allow additional menu items to be added to the order.

To use the feature, click the *Misc* button, the *Print Tasks* button, and then select the *Send* button. The existing items on the guest check that were sent to the kitchen now display asterisks

(*) to the left of the items' listings, indicating that the items have been sent. The user may continue adding menu items to the order as desired.

PRINT

The Print feature allows the user to print the contents of the guest check as it is currently displayed on the screen.

To print the guest check, simply select the *Misc* button, the *Print Tasks* button, and then the *Print* button. The information on the guest check prints to the designated receipt printer in the form of a customer receipt (See Figure 39-120).

CHECKERS RESTAURANT	
America's Favorite Bar and Grill.	
Order #: 89	10-11 04:22 PM
Server: Eleanor	Terminal: 1

Dine In	
1 Guest	Check #1

1 Buffalo Wings	6.95
1 Stuffed Jalapeños	4.95
1 Coca~Cola	1.75
1 Budweiser	3.95
1 New York Steak	16.95
Medium Well	
Baked Potato	
Sour Cream	
Chives	
Steamed Vegetables	
1 Roasted Chicken	12.95
French Fries	
Rice Pilaf	
1 Vanilla Ice Cream	2.50
1 Cheese Cake	3.95
Gratuity	9.00

Sub Total:	\$62.95
Tax:	\$3.98
Total:	\$66.93
THANK YOU for Dining with Us. Please Come Again.	
** Printed 10-11 04:29 PM **	

Figure 39-120

FOLIO INQUIRY

Reserved for future use.

DONE

Select the *Done* button when finished entering the customer's order and you wish to send it to the kitchen for preparation. For additional information on this feature, see the chapter titled *Done* on page 491 of this manual.

EXIT

Click the *Exit* button if you wish to close the Order Entry screen and return to the Login screen.

If an order has been entered but not yet sent to the kitchen and you wish to discard it, select the *YES ... Discard Changes and Logout* button on the confirmation window that appears. To remain in the Order Entry screen, select the *Cancel* button.

If the order displayed on the Order Entry screen has already been sent to the kitchen, clicking the *Exit* button automatically closes the Order Entry screen and returns to the Login screen without displaying the confirmation window.

Chapter 40 — Done

Click the *Done* button when finished entering the customer's order to send the order to the kitchen for preparation (See Figure 40-1).



Figure 40-1

Based upon the settings entered in the XERA® POS Manager application, XERA® POS either exits and returns to the Login screen or remains in the Order Entry screen, ready to accept a new customer order.

To remain in the Order Entry screen, open the XERA® POS Manager application and enable repetitive order entry by navigating to **Company Tab > Settings > Terminal Settings > List Tab** and then double-clicking on your terminal name in this list. Next, select the *Settings* Tab and expand the *POS Settings* option. Double click the *Enable Repetitive Order Entry* setting and set its value to “Yes.”

Notes

