



# User Manual

© Aldelo, L.P. All Rights Reserved



XERA® POS User Manual

PUBLISHED BY

Aldelo, LP

6800 Koll Center Parkway, Suite 310

Pleasanton, CA 94566

Copyright © 1997-2017 by Aldelo, LP

All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means whatsoever without the express written permission of the publisher.

This manual is available through Aldelo, LP and resellers worldwide. Please contact Aldelo, LP or visit our website at [www.aldelo.com](http://www.aldelo.com) for more information. Send comments about this manual to [support@aldelo.com](mailto:support@aldelo.com).

Aldelo® is the registered trademark of Aldelo, LP. Other products or company names mentioned herein may be the trademarks of their respective owners.

The example companies, organizations, products, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, logo, person, place, or event is intended or should be inferred.

For the sake of simplicity, all gender references are written only in the masculine. Any references to the masculine gender should be interpreted to include the feminine gender as well and vice versa, wherever applicable.





|  |    |
|--|----|
| CHAPTER 1 OPENING PROCEDURES.....                  | 1  |
| <i>Login Screen</i> .....                          | 1  |
| Logging In .....                                   | 2  |
| Gift Card Verification .....                       | 4  |
| Terminal Configuration.....                        | 4  |
| “Refresh Settings” Button.....                     | 5  |
| “Load Balanced Printers” Button .....              | 6  |
| “OK” Button.....                                   | 6  |
| Primary Data Source.....                           | 6  |
| SQL Server Instance .....                          | 6  |
| Authentication Type .....                          | 7  |
| User Name .....                                    | 7  |
| Password.....                                      | 8  |
| “Test” Button.....                                 | 8  |
| SQL Database Name .....                            | 8  |
| “Connect” Button .....                             | 9  |
| Exiting XERA® POS.....                             | 9  |
| <i>Starting Your Server Bank</i> .....             | 10 |
| Server Bank .....                                  | 10 |
| <i>Cashier In</i> .....                            | 12 |
| Logging In to your Cash Drawer .....               | 12 |
| Cash Tray Beginning Count.....                     | 14 |
| CHAPTER 2 RECALL .....                             | 17 |
| <i>New Order</i> .....                             | 18 |
| Order Types .....                                  | 18 |
| Menus .....  | 19 |
| Menu Groups .....                                  | 20 |
| Menu Item Modifier Selection .....                 | 21 |
| Default Modifiers.....                             | 22 |
| Remove Default.....                                | 23 |
| Cancel.....  | 24 |
| Complete .....                                     | 24 |
| <i>Order Status</i> .....                          | 25 |
| <i>Order Type</i> .....                            | 26 |
| <i>Server Filter</i> .....                         | 27 |
| <i>Order Filter</i> .....                          | 28 |
| <i>Date Filter</i> .....                           | 28 |
| <i>Time Filter</i> .....                           | 30 |
| <i>Search Any</i> .....                            | 31 |
| <i>Combine Any</i> .....                           | 32 |
| <i>Re-Open Check</i> .....                         | 32 |
| CHAPTER 3 SETTLE .....                             | 35 |
| <i>Settling with Cash</i> .....                    | 36 |
| <i>Settling with a Credit Card</i> .....           | 38 |
| <i>Settling with a Gift Card</i> .....             | 38 |
| CHAPTER 4 COURSES .....                            | 39 |
| <i>Automatic Courses</i> .....                     | 39 |
| Assigning an Automatic Course to a Menu Item ..... | 39 |

|  |    |
|--|----|
| Ordering an Automatic Course Menu Item .....     | 40 |
| <i>Manual Courses</i> .....                      | 41 |
| Assigning a Course to a Menu Item Manually ..... | 41 |
| Courses .....                                    | 42 |
| Group By Seats .....                             | 43 |
| Clear .....                                      | 44 |
| CHAPTER 5 MENU .....                             | 45 |
| CHAPTER 6 PRINT .....                            | 47 |
| CHAPTER 7 MISCELLANEOUS FEATURES .....           | 49 |
| <i>New Order</i> .....                           | 50 |
| <i>Recall Order</i> .....                        | 50 |
| <i>Cashier</i> .....                             | 50 |
| Cash Drawer 'x' .....                            | 50 |
| Sign In .....                                    | 50 |
| No Sale .....                                    | 50 |
| Pay In .....                                     | 50 |
| Void .....                                       | 52 |
| Pay Out .....                                    | 52 |
| Tip Out .....                                    | 53 |
| Pay Out (to a Payee) .....                       | 54 |
| Wage Advance .....                               | 56 |
| Safe Drop .....                                  | 57 |
| Void .....                                       | 58 |
| Edit Gratuity .....                              | 60 |
| Search by Order # .....                          | 63 |
| Search by Ticket # .....                         | 63 |
| Search by Card Last 4 .....                      | 64 |
| Cashier Report .....                             | 65 |
| Blind Close .....                                | 65 |
| Sign Out .....                                   | 67 |
| Performing the Final Count .....                 | 67 |
| Go Back .....                                    | 68 |
| Re-Open .....                                    | 69 |
| Cashier Report .....                             | 69 |
| Accept .....                                     | 70 |
| My Server Bank .....                             | 70 |
| Sign In .....                                    | 71 |
| Pay In .....                                     | 71 |
| Pay In .....                                     | 72 |
| Void .....                                       | 73 |
| Pay Out .....                                    | 74 |
| Tip Out .....                                    | 74 |
| Pay Out (to a Payee) .....                       | 76 |
| Wage Advance .....                               | 78 |
| Safe Drop .....                                  | 79 |
| Void .....                                       | 80 |
| Edit Gratuity .....                              | 82 |
| Search by Order # .....                          | 85 |
| Search by Ticket # .....                         | 85 |
| Search by Card Last 4 .....                      | 86 |
| Cashier Report .....                             | 87 |
| Blind Close .....                                | 87 |

---

|                                  |     |
|----------------------------------|-----|
| Sign Out.....                    | 89  |
| Performing the Final Count.....  | 89  |
| Go Back .....                    | 90  |
| Re-Open .....                    | 90  |
| Cashier Report.....              | 90  |
| Accept .....                     | 90  |
| All Cash Drawers .....           | 91  |
| Blind Close.....                 | 91  |
| All Server Banks .....           | 92  |
| Pay In.....                      | 92  |
| Pay Out.....                     | 93  |
| Edit Gratuity .....              | 93  |
| Cashier Report.....              | 93  |
| Blind Close.....                 | 93  |
| Sign Out.....                    | 93  |
| Cashier Reconcile .....          | 94  |
| Reconciled History.....          | 95  |
| <i>End of Day</i> .....          | 96  |
| Review End of Day.....           | 97  |
| Perform End of Day .....         | 99  |
| <i>Hostess</i> .....             | 100 |
| Rotate.....                      | 103 |
| Attach.....                      | 105 |
| Detach.....                      | 107 |
| Progress.....                    | 108 |
| Transfer.....                    | 110 |
| Move.....                        | 111 |
| Recall .....                     | 112 |
| New.....                         | 112 |
| Log Out.....                     | 112 |
| <i>Time Card</i> .....           | 113 |
| Clock In .....                   | 114 |
| Begin Break .....                | 116 |
| End Break .....                  | 118 |
| Begin Lunch.....                 | 120 |
| End Lunch.....                   | 122 |
| Work Schedules .....             | 124 |
| Review Time Cards.....           | 125 |
| Edit Time Cards .....            | 126 |
| Time Cards .....                 | 127 |
| Time Exceptions.....             | 128 |
| Select Audit Action .....        | 129 |
| “View Details” Button .....      | 130 |
| “Approve Exception” Button ..... | 130 |
| “Deny Exception” Button .....    | 130 |
| Add Time Card.....               | 131 |
| Review Time Cards .....          | 131 |
| OK.....                          | 132 |
| Report Gratuity .....            | 132 |
| Edit Availability.....           | 133 |
| Delete Availability Entry.....   | 133 |

|   |            |
|---|------------|
| “Click to Add Availability Entry” Button..... | 134        |
| Tip Pools Not Paid Out .....                  | 135        |
| Still Clocked In List .....                   | 136        |
| <i>Customer</i> .....                         | <i>136</i> |
| “New” Button.....                             | 137        |
| “Profile” Button .....                        | 137        |
| “Memo” Button.....                            | 137        |
| “Save” Button.....                            | 137        |
| “Search” Button .....                         | 138        |
| “Lookup Address” Button .....                 | 138        |
| “OK” Button .....                             | 138        |
| <i>Driver Dispatch</i> .....                  | <i>138</i> |
| Select Custom Driver .....                    | 138        |
| Review Order .....                            | 139        |
| Assign .....                                  | 139        |
| Unassign.....                                 | 139        |
| Email Driver.....                             | 139        |
| Departure.....                                | 139        |
| Cancel Departure.....                         | 140        |
| Arrival .....                                 | 140        |
| Money Drop .....                              | 140        |
| Time Card .....                               | 140        |
| <i>Count Down List</i> .....                  | <i>140</i> |
| Add Item .....                                | 141        |
| Lookup by Item Name .....                     | 142        |
| Recipe.....                                   | 143        |
| Go Back.....                                  | 144        |
| Lookup by Item SKU .....                      | 145        |
| Recipe.....                                   | 146        |
| Go Back.....                                  | 146        |
| Lookup by Item UPC .....                      | 147        |
| Recipe.....                                   | 148        |
| Go Back.....                                  | 148        |
| <i>Customer Order Actions</i> .....           | <i>151</i> |
| Modify.....                                   | 152        |
| Prep .....                                    | 152        |
| Note.....                                     | 153        |
| Clear Note .....                              | 154        |
| Repeat .....                                  | 154        |
| Void.....                                     | 155        |
| Hold.....                                     | 155        |
| Hold Until .....                              | 156        |
| Hold For .....                                | 157        |
| Manual Hold .....                             | 158        |
| Hold Time Display.....                        | 158        |
| Clear Hold .....                              | 159        |
| Discount .....                                | 161        |
| Fixed Amount Type Discount .....              | 162        |
| Open Amount Type Discount .....               | 163        |
| Percentage Amount Type Discount .....         | 163        |
| Buy One Get One (BOGO) Type Discount.....     | 163        |
| Discount Display.....                         | 164        |

|  |            |
|--|------------|
| Clear Discount .....                           | 165        |
| Share .....                                    | 166        |
| Price .....                                    | 167        |
| Remake .....                                   | 167        |
| No Make .....                                  | 167        |
| Clear Seat .....                               | 167        |
| Clear Course .....                             | 168        |
| Add Qty .....                                  | 168        |
| Recipe .....                                   | 169        |
| Like Items .....                               | 170        |
| Menu Groups .....                              | 170        |
| <i>Order Commands</i> .....                    | <i>170</i> |
| <i>Additional Miscellaneous Features</i> ..... | <i>171</i> |
| PLU.....                                       | 172        |
| Lookup by Item Name .....                      | 174        |
| Recipe .....                                   | 175        |
| Go Back .....                                  | 175        |
| Lookup by Item SKU .....                       | 176        |
| Recipe .....                                   | 177        |
| Go Back .....                                  | 177        |
| Lookup by Item UPC.....                        | 178        |
| Recipe .....                                   | 179        |
| Go Back .....                                  | 179        |
| Select All .....                               | 179        |
| Menu .....                                     | 180        |
| Discount Order.....                            | 181        |
| Percent Type Discount.....                     | 181        |
| Fixed Amount Type Discount .....               | 181        |
| Open Amount Type Discount.....                 | 181        |
| Surcharge Order.....                           | 181        |
| Percent Type Surcharge.....                    | 182        |
| Fixed Amount Type Surcharge.....               | 182        |
| Open Amount Type Surcharge .....               | 182        |
| Tax Exempt.....                                | 183        |
| Hold Order.....                                | 184        |
| Hold Until.....                                | 185        |
| Hold For.....                                  | 186        |
| Manual Hold.....                               | 186        |
| Hold Time Display .....                        | 187        |
| Clear Hold.....                                | 188        |
| Pickup Name.....                               | 189        |
| Void Order .....                               | 191        |
| Return .....                                   | 192        |
| Guests .....                                   | 193        |
| Bar Tab Pre-Auth.....                          | 194        |
| Bar Tab Name.....                              | 195        |
| Gratuity.....                                  | 196        |
| Percent Type Gratuity.....                     | 197        |
| Fixed Amount Type Gratuity.....                | 197        |
| Open Amount Type Gratuity .....                | 197        |
| Seating .....                                  | 197        |

|  |     |
|--|-----|
| Courses.....   | 198 |
| Order Types.....   | 199 |
| Split / Combine .....  | 200 |
| Splitting an Order.....  | 200 |
| Combining Orders.....  | 202 |
| Transfer .....   | 203 |
| Current Check.....   | 204 |
| Current Order.....   | 207 |
| All My Open Orders .....   | 208 |
| Acceptance or Rejection of Inbound Orders by the Transferee..... | 209 |
| Cancel Pending Transfer.....                                     | 211 |
| Settle .....   | 212 |
| Send.....  | 212 |
| Print.....   | 213 |
| Folio Inquiry .....  | 213 |
| Done.....  | 214 |
| Exit.....  | 214 |
| CHAPTER 8 DONE .....   | 215 |
| NOTES.....   | 217 |

# Chapter 1

## Opening Procedures

### 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 number of the computer. In addition, the user may access the **Alpha-Numeric Keyboard** feature, the **Gift Card** feature, the **Terminal Configuration** feature, and exit XERA® POS from the Login screen (See Figure 1-1).



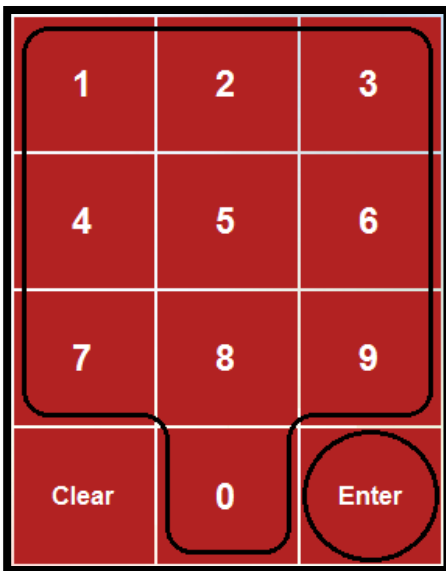
Figure 1-1

## 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. 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 1-2).



**Figure 1-2**

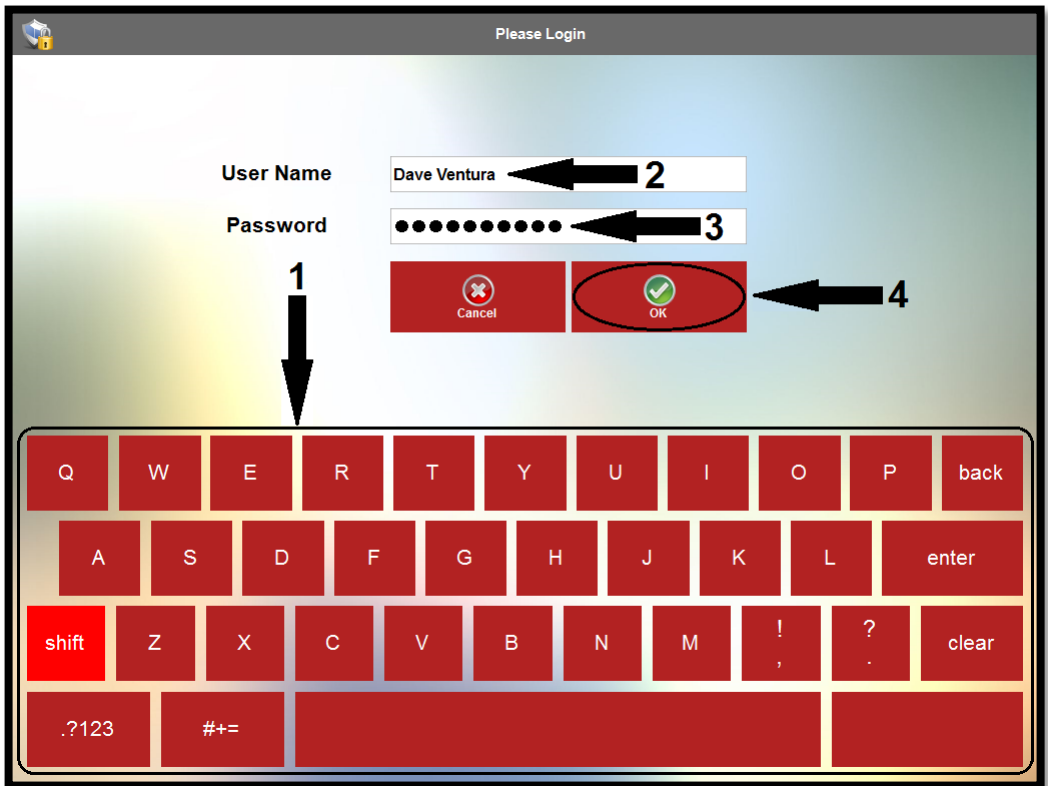
2. If your access code contains only alpha characters or both numeric and alpha characters, display the Alpha-Numeric Login virtual keyboard by clicking the Login button at the bottom of the Login screen (See Figure 1-3).



**Figure 1-3**



3. Use the virtual keyboard to enter your user name and password in the appropriate fields and then click the “OK” button to login (See Figure 1-4).



**Figure 1-4**

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 unless manager approval is obtained, 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 clicking the Gift Card Verification button at the bottom of the Login screen and then entering your access code (See Figure 1-5).



**Figure 1-5**

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.

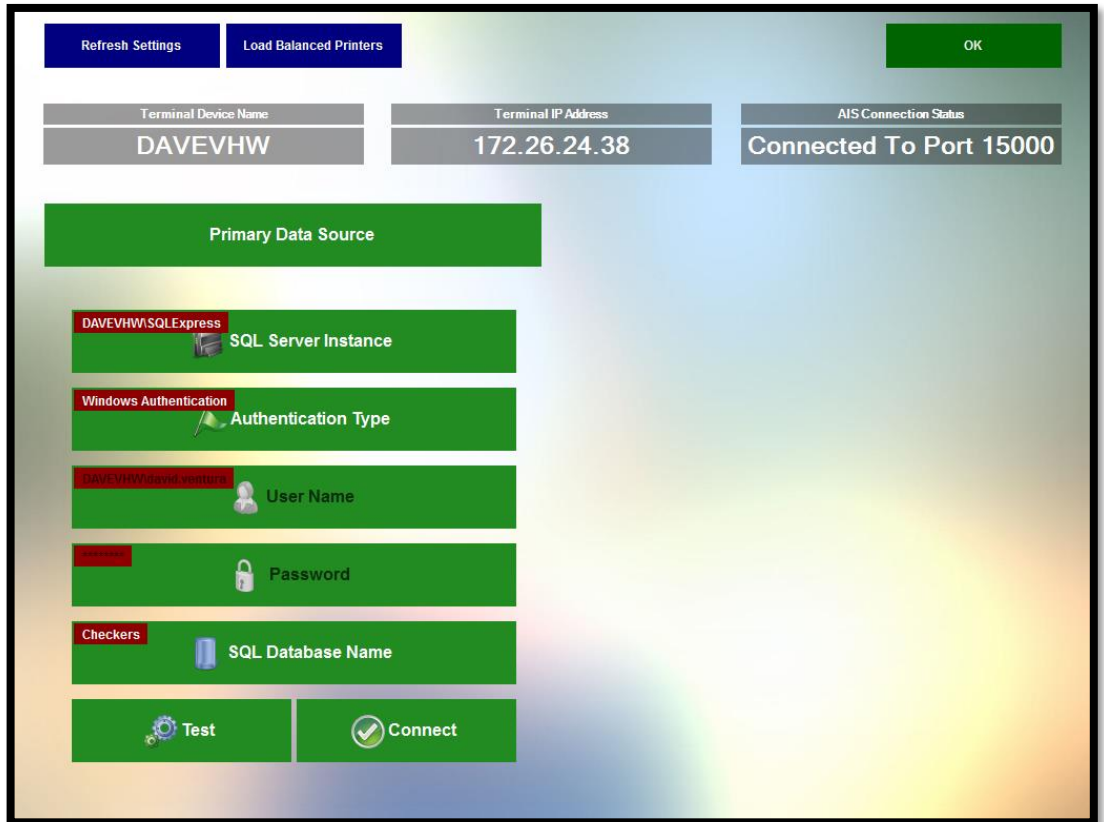
## Terminal Configuration

The **Terminal Configuration** feature allows the user to set the primary data source in XERA® POS. To open the Terminal Configuration feature, click the “Terminal Configuration” button at the bottom of the Login screen and then enter your access code into the virtual numeric keypad on the Login screen (See Figure 1-6).



**Figure 1-6**

The Terminal Configuration data entry screen displays (See Figure 1-7).



**Figure 1-7**

Follow the steps below to setup or change your data source settings.

### “Refresh Settings” Button

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” Button**

The **Load Balanced Printers** feature allows you to alternate the printing to one device location between two separate printers. When enabled, this feature causes the first group of print jobs to go to the primary printer, the second group of print jobs to go to the alternate printer, the third group of print jobs to go to the primary printer, etc. Click the “Load Balanced Printers” button to activate the **Load Balanced Printers** feature. Click the button again to deactivate the feature. For additional information on how to setup and use this feature, please see the XERA® POS Manager Manual.

**“OK” Button**

Click the “OK” button after making any changes on this screen to save your changes and exit the Terminal Configuration screen.

**Primary Data Source**

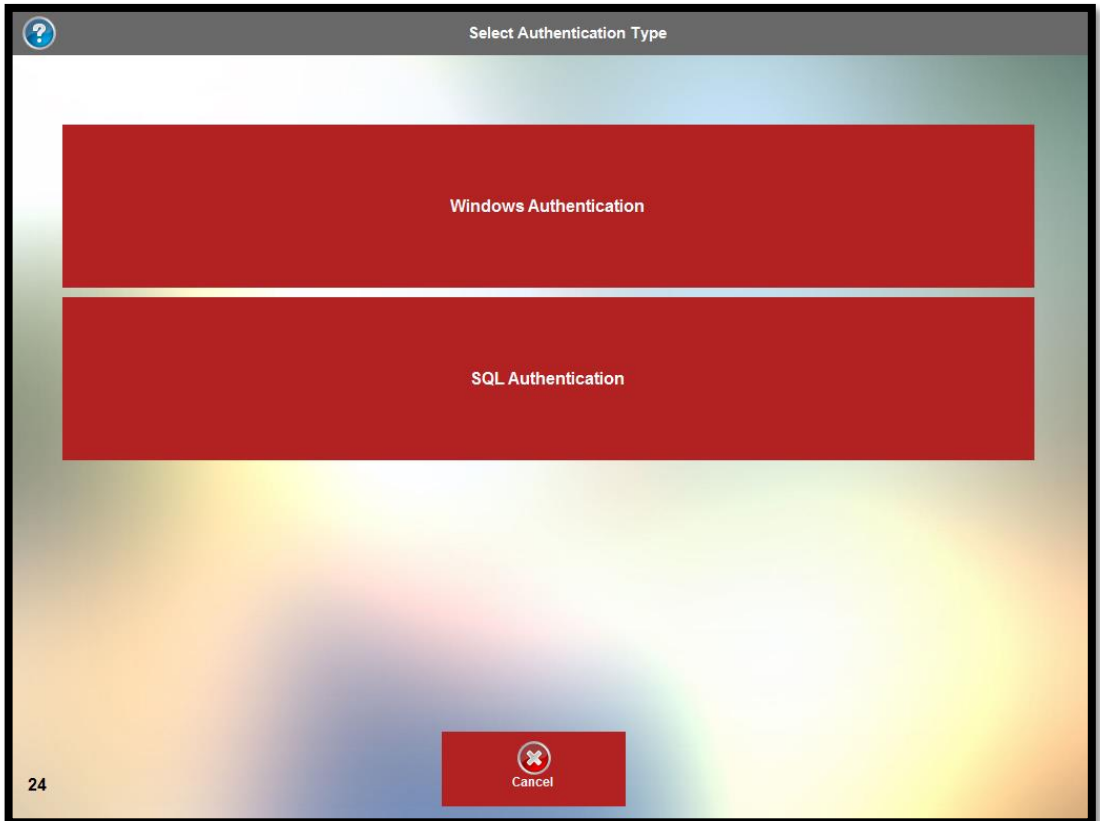
The Primary Data Source is set by using the buttons on the left side of the screen. The settings for each button are described below.

**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 the appropriate button (See Figure 1-8).



**Figure 1-8**

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 on the Select Authentication Type window (above), click this button and enter your user name via the on-screen virtual keyboard that displays. Click the “OK”

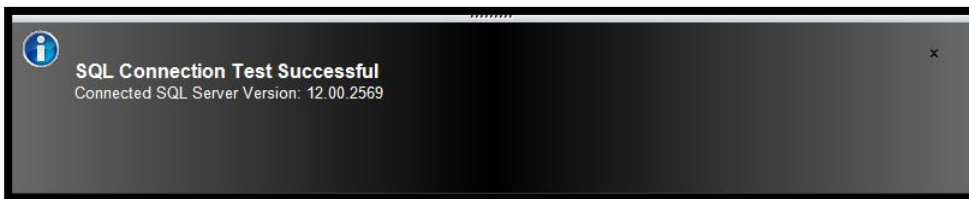
button on the keyboard when finished to save your changes. Contact your XERA® POS authorized reseller or your database administrator if you do not know your user name or you need to create a new user name. Please note that the user name and password are only required when using SQL authentication.

### **Password**

If you selected SQL Authentication on the Select Authentication Type window (above), click this 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” Button**

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 1-9).



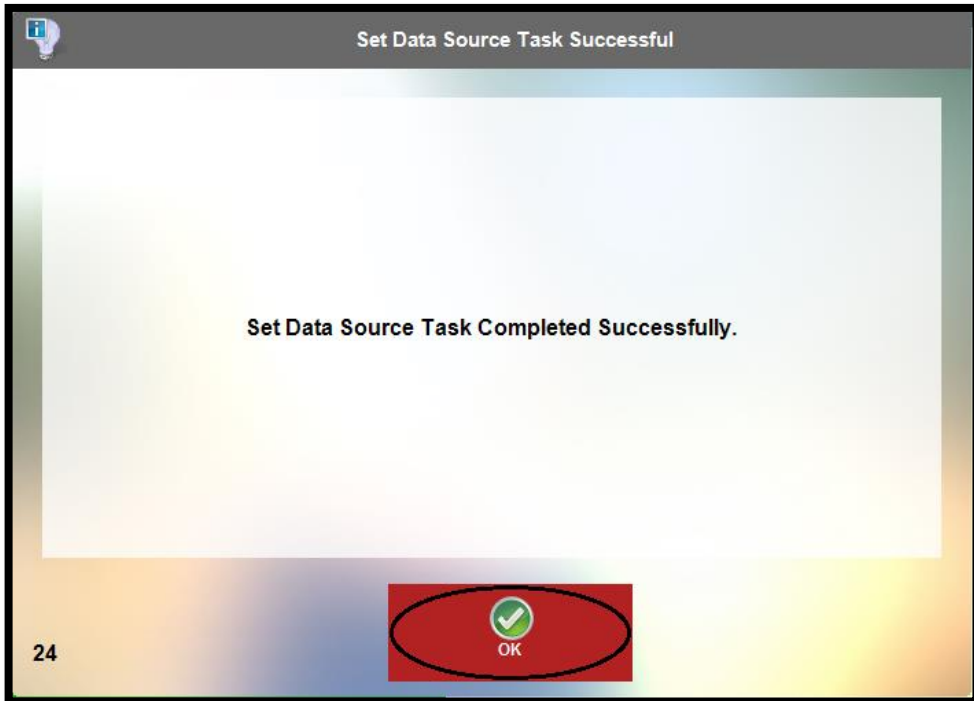
**Figure 1-9**

### **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” Button

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 window displays. Click the “OK” button to dismiss the window (See Figure 1-10).



**Figure 1-10**

### 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 a doorway) and then enter your access code into the virtual numeric keypad that displays. The software closes immediately.

## Starting Your Server Bank

### Server Bank

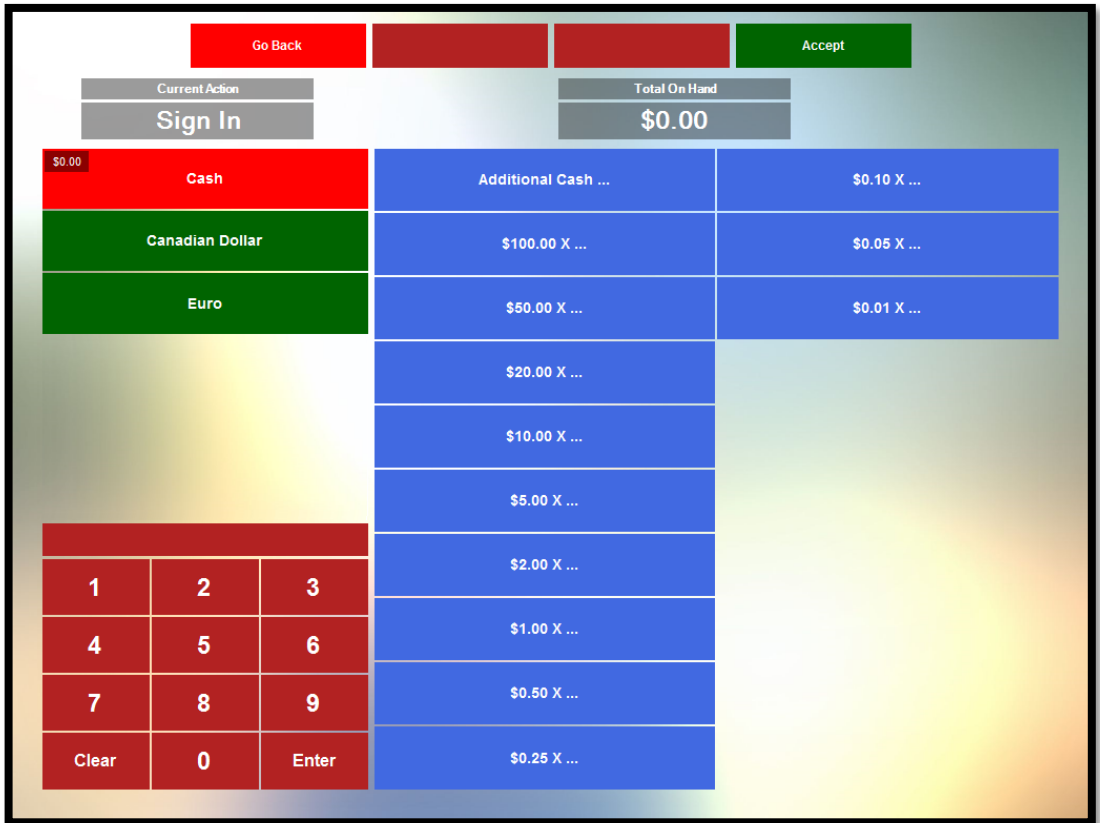
There are two options in XERA® POS for managing settlement transactions: Cash Drawer and Server Bank. Server Bank is used when employees take care of their own money and a cash drawer is not assigned to them. It is often considered as their own personal cash drawer without the physical hardware. Money 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 three requirements that need to be setup in the XERA® POS Manager application:

1. Under **Company Tab > Settings > Store Settings > Main Tab**, double-click on **Cashier Settings** to expand the list of settings. Click on **Enable Server Banking** in the list and then select **Yes** from the Select Value dropdown list on the right side of the screen. When finished, click on another item in the list of cashier settings to save the changes to the list.
2. 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 .
3. 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 in to 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 1-11).



**Figure 1-11**

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 the first denomination of bills or coins.
3. Click the button on the 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 that you counted. XERA® POS automatically calculates the total monetary value (the denomination multiplied by the 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 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.

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

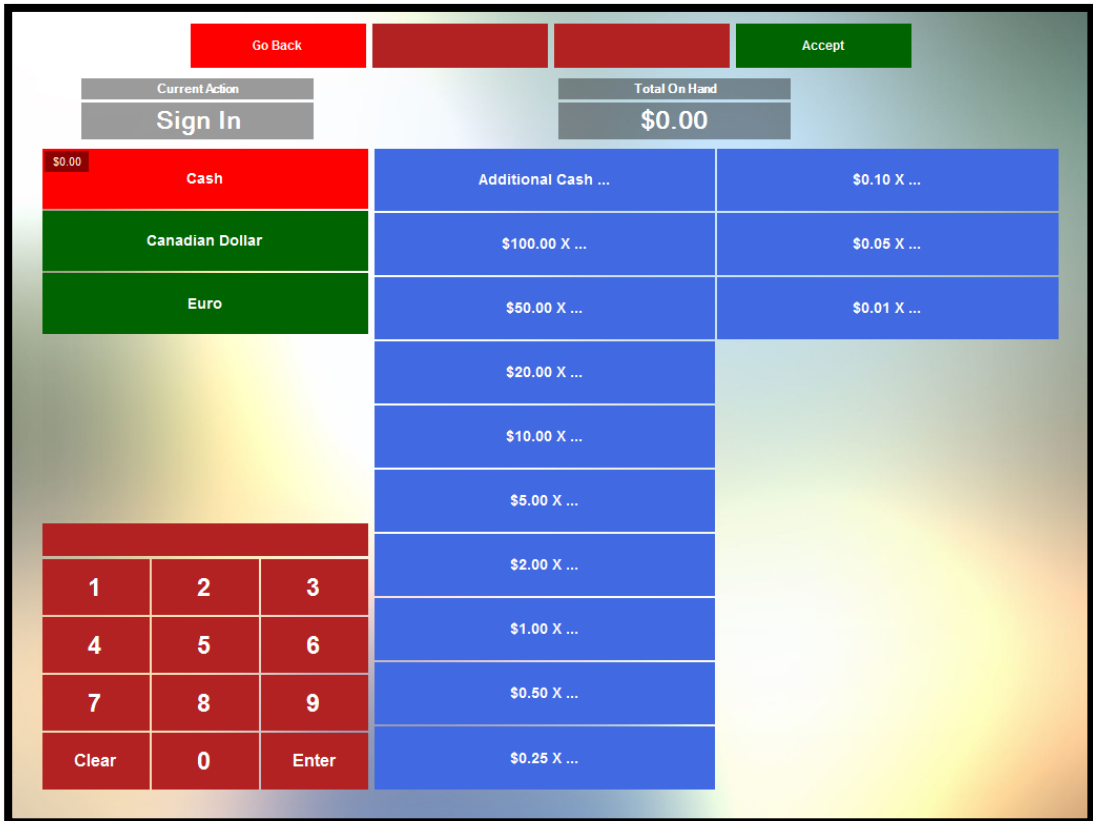
The Cash Drawer method for managing settlement transactions is used when a cashier station is employed. A restaurant may have one or more cashier stations. The cash drawer is attached to a terminal and the transactions are recalled by the cashier and settled on the spot. The cashier station may serve 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.
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 the “Done” button.
11. Finally, be sure to assign the security role selected in step #7, above, to all employees whom you wish to use as cashiers. To do so, in the XERA® POS Manager application navigate to **Employee Tab > Manage > Employees**, 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 it has 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 this button assigns the cash tray to the cashier and displays the Cash Count screen (See Figure 1-12).



**Figure 1-12**

### 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 from the left side of the screen.
2. Count the total number of the first denomination of bills or coins.
3. Click the button on the 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 that you counted. XERA® POS automatically calculates the total monetary value (the denomination

- multiplied by the 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, enter ‘0’ for the 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.

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 2

## Recall

Upon logging into XERA® POS, one of the screens that may display first is the Recall screen. Select the “Recall” button at the bottom of the first screen that displays to make sure you are viewing the Recall screen (See Figure 2-1).



Figure 2-1

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

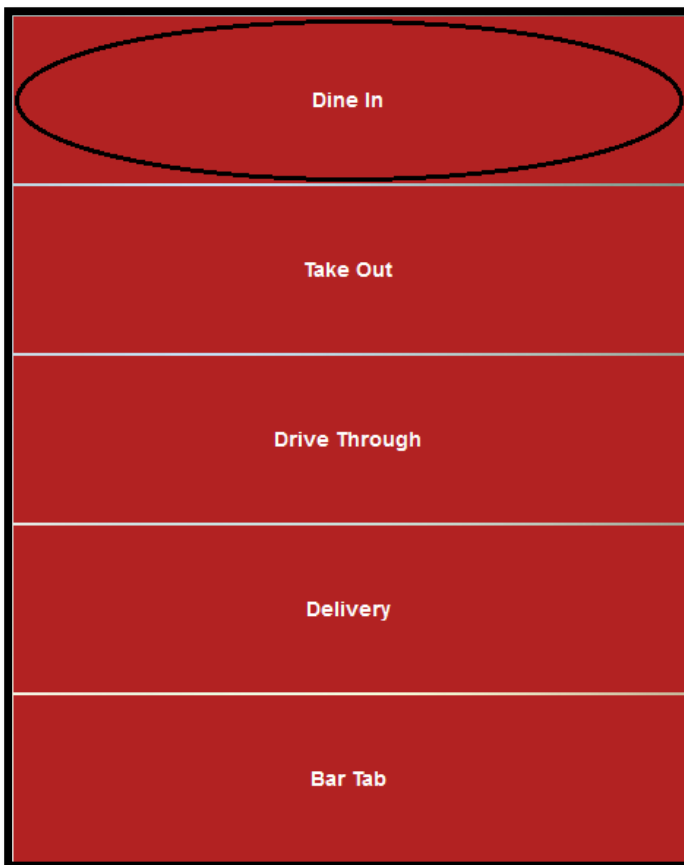
may be created and existing guest checks may be re-opened. Each of these features under the Recall screen is described in this chapter.

## **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 the appropriate button (See Figure 2-2).

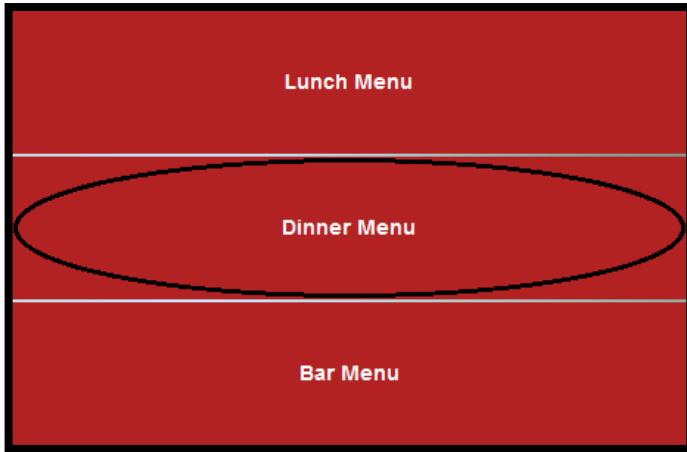


**Figure 2-2**



**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 the appropriate menu's button (See Figure 2-3).



**Figure 2-3**

## 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 chosen, 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 the menu items' respective buttons (See Figure 2-4).

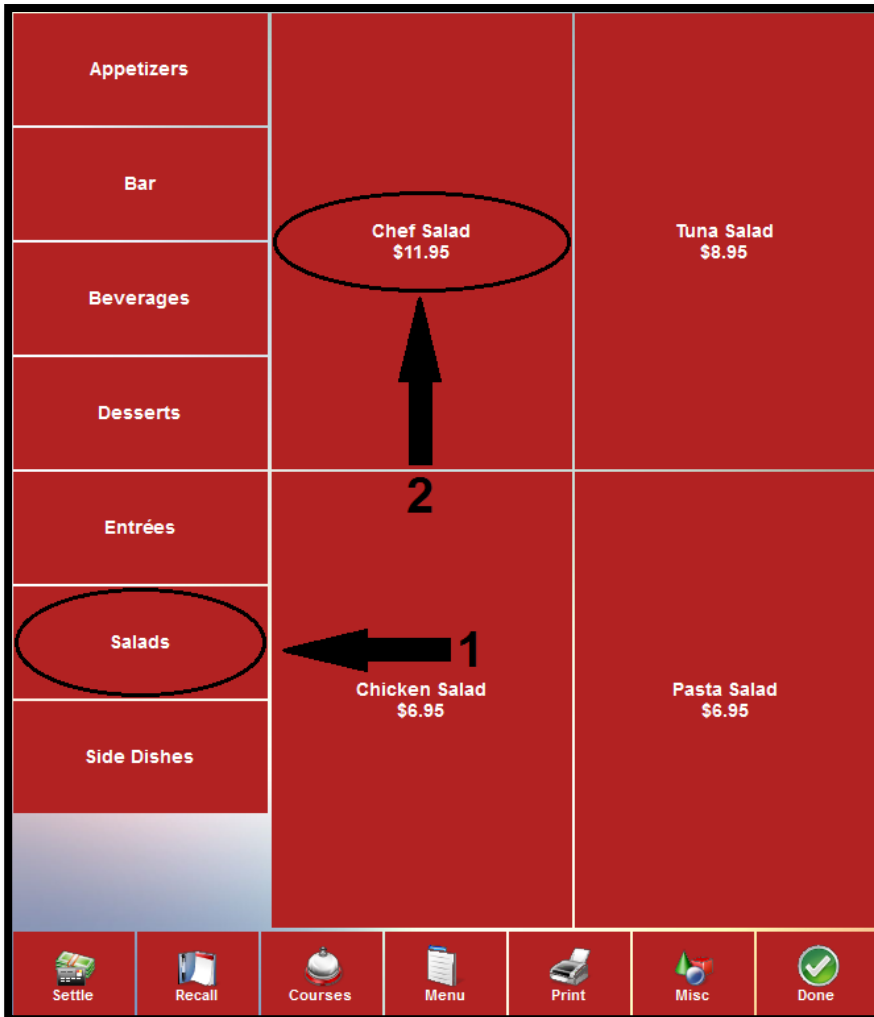


Figure 2-4

### Menu Item Modifier Selection

If the selected menu item has modifiers attached to it, they display immediately following the selection of the menu item. Click on the desired modifier to add it to the order (See Figure 2-5).



Figure 2-5

## 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 background 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. Alternatively, if there are additional levels of modifiers yet to be selected, you may click the next modifier group button in the left column of buttons to accept the current default modifier and continue to the next group of modifiers (See Figure 2-6).

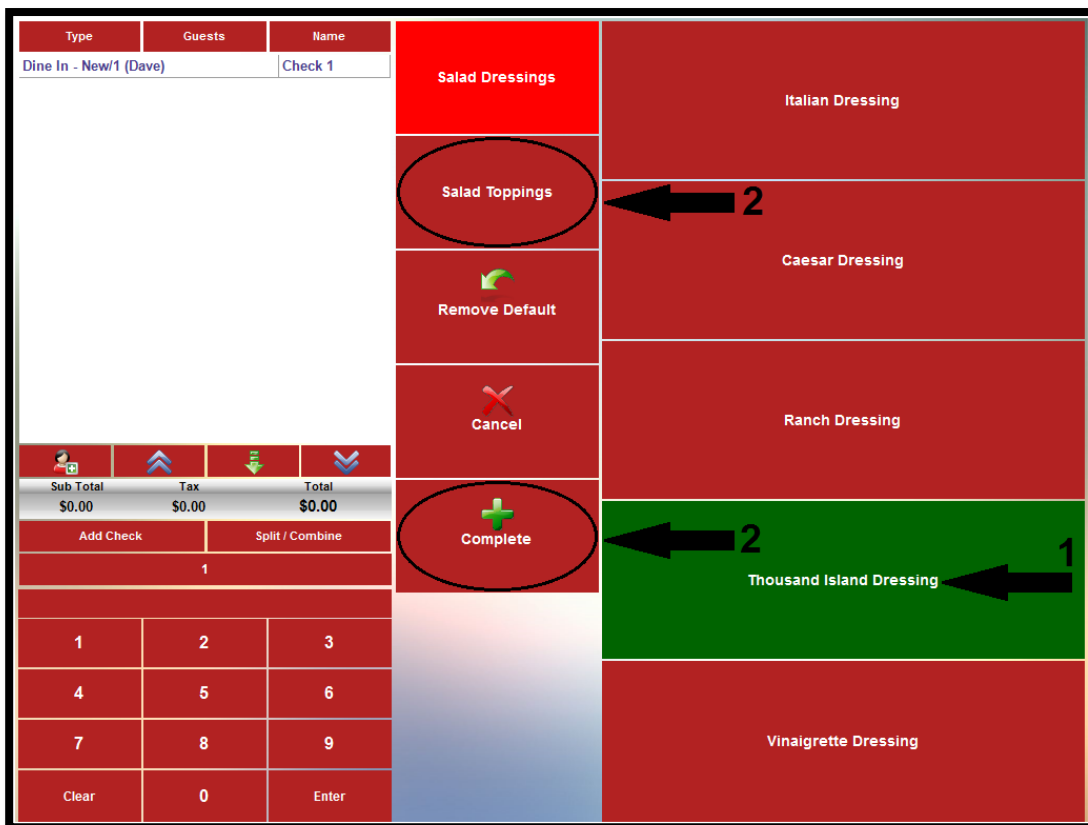


Figure 2-6

### Remove Default

If the customer does not wish to order the menu item with the default modifier but wishes to skip the addition of this modifier all together, it may be removed by clicking the “Remove Default” button and then clicking the button corresponding to the default modifier (the one displayed with green label text).

Please note that to use this feature, an alternate item must be selected in the XERA® POS Manager application under **POS Tab > Modifiers > Modifier Groups**. Double-click the respective modifier group under the List Tab, click the Designer Tab, and then double click the Default Modifier button (the one displayed with green label text). Select the alternate item in the De-Selected Item field. It may be necessary to create an appropriate alternate item first (See Figure 2-7).

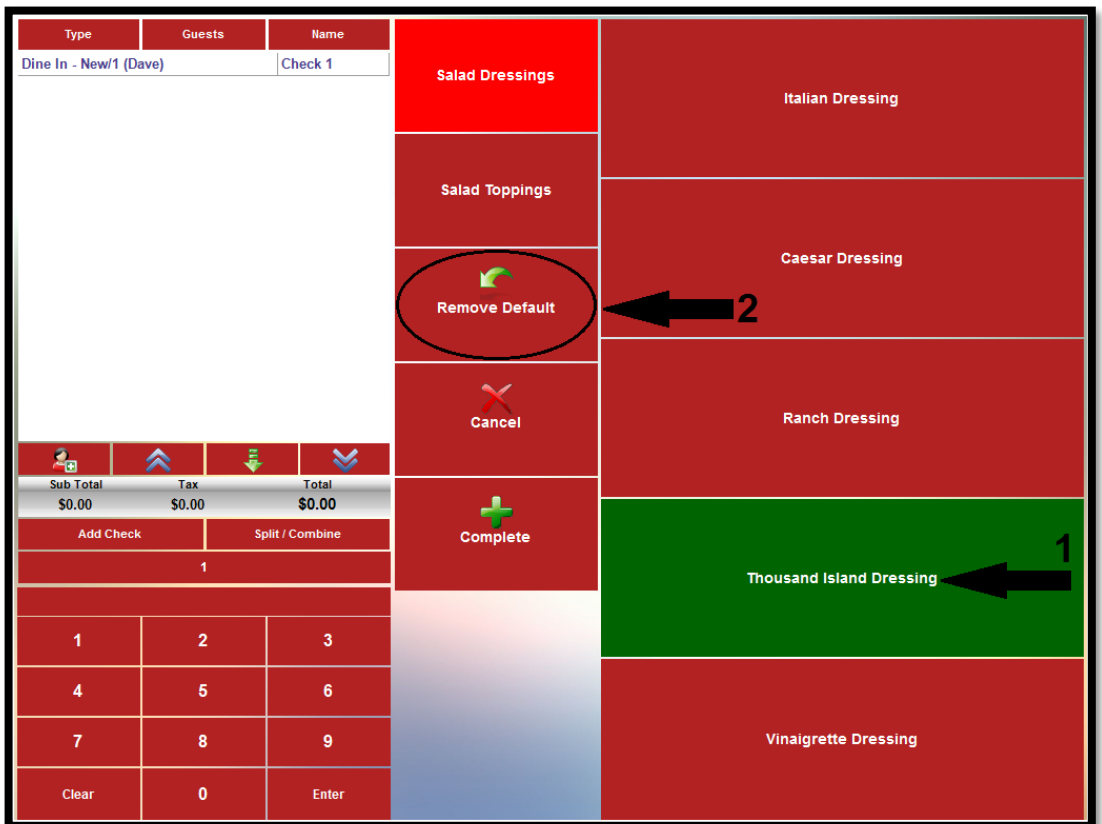
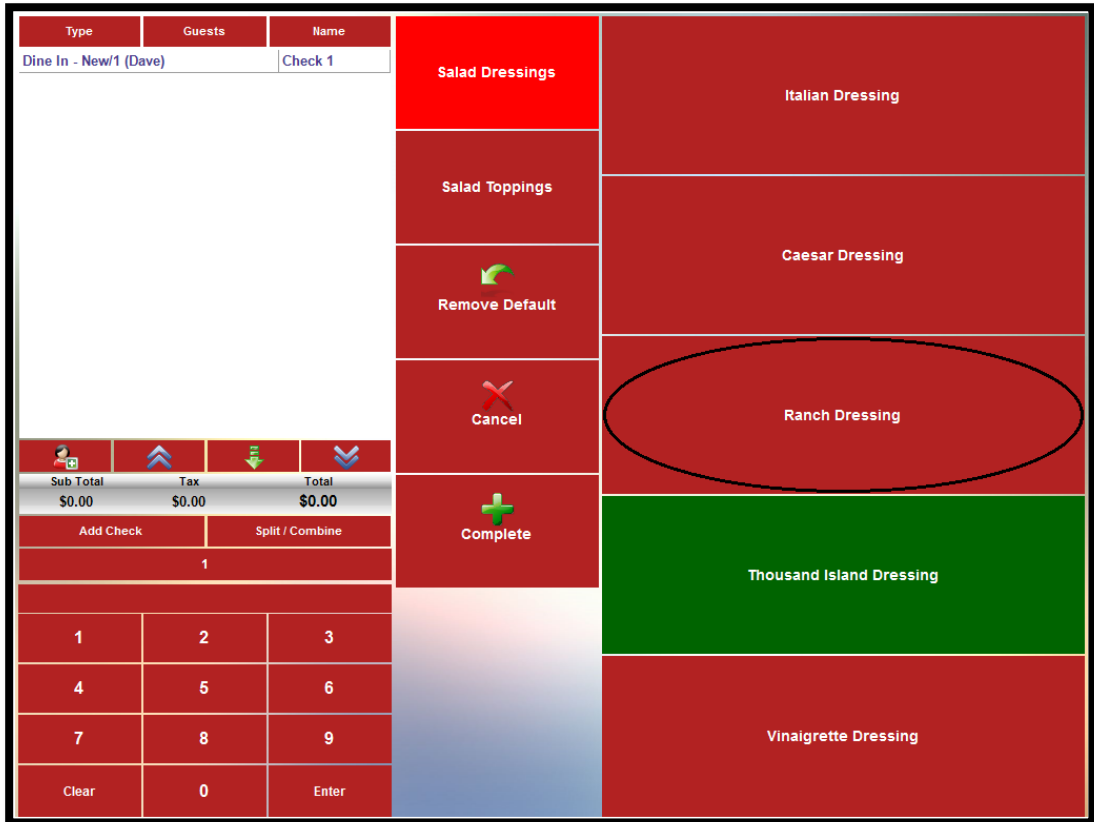


Figure 2-7

Alternatively, if the customer wishes to order the item with a modifier different than the default modifier, simply click on the desired modifier. This action substitutes the selected modifier for the default modifier (See Figure 2-8).



**Figure 2-8**

### Cancel

Click the “Cancel” button to return to the previous screen.

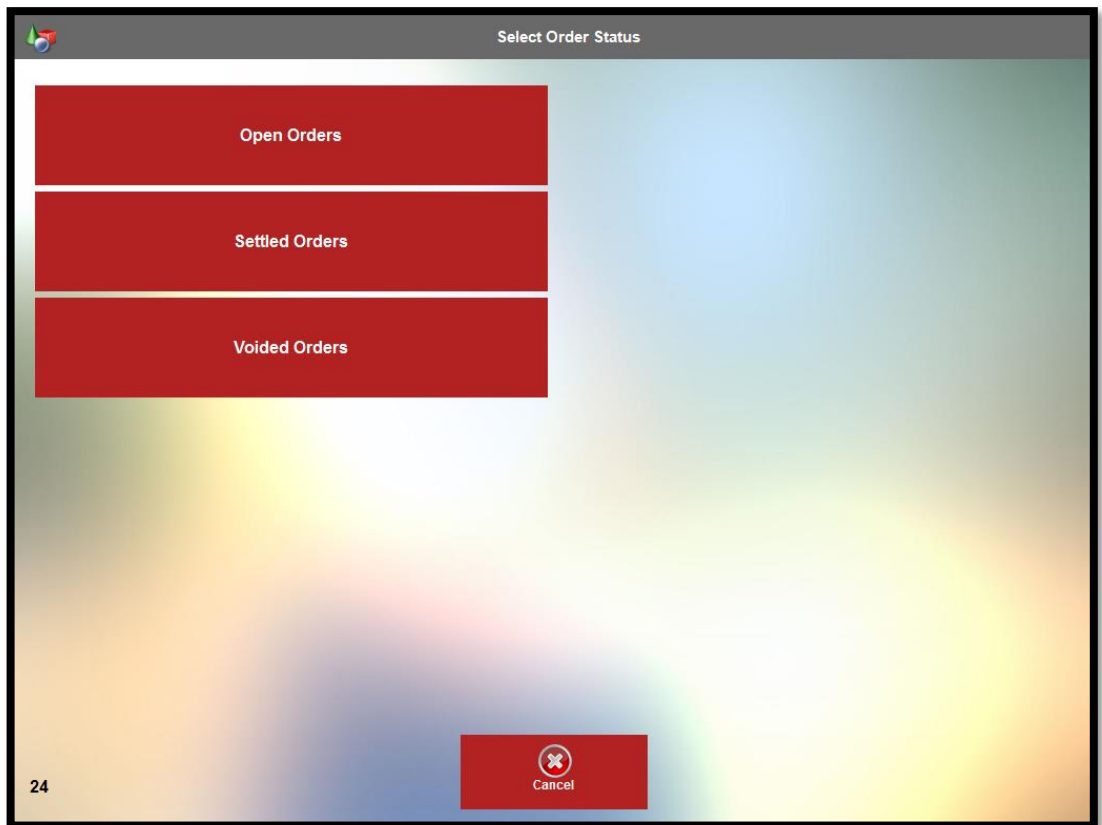
### Complete

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, then 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 selected to indicate that the order for the menu item is complete; otherwise, the software waits for the third modifier to be selected before adding the menu item to the guest check. Click the “Complete” button in these two situations to continue with the customer order.

## Order Status

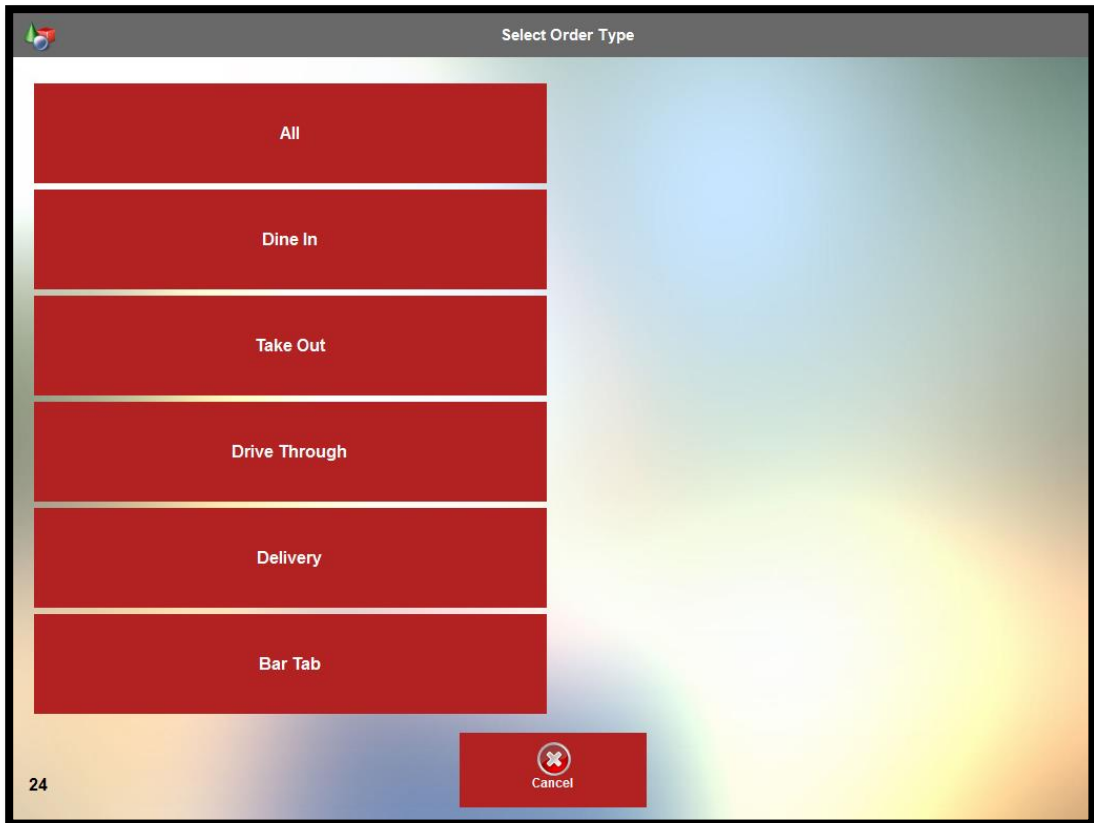
Click the “Order Status” button to display the Select Order Status window. Here the user may filter the list of orders to display only the type of order that he is seeking. Open orders, settled orders, and voided orders may be displayed by clicking on their respective buttons in the Select Order Status window. Click the “Cancel” button to exit the Select Order Status window without making any changes (See Figure 2-9).



**Figure 2-9**

## 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 was created in the XERA® POS Manager application. 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 orders of all types. Click the “Cancel” button to exit the window without making any changes (See Figure 2-10).



**Figure 2-10**

Order types are user defined and 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. The servers’ 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 up and down arrow buttons to scroll from one screen to another. Click the “Cancel” button to exit the window without making any changes (See Figure 2-11).

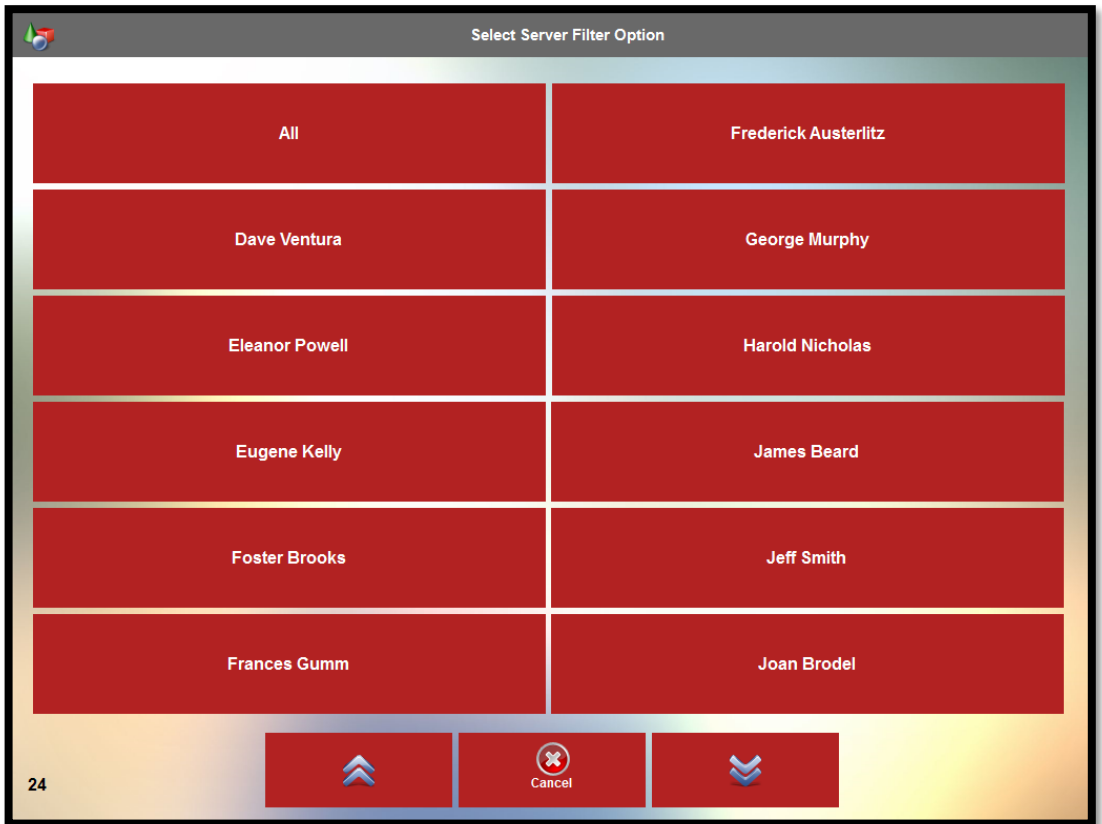


Figure 2-11

Employees are user defined and 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 new 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 2-12).

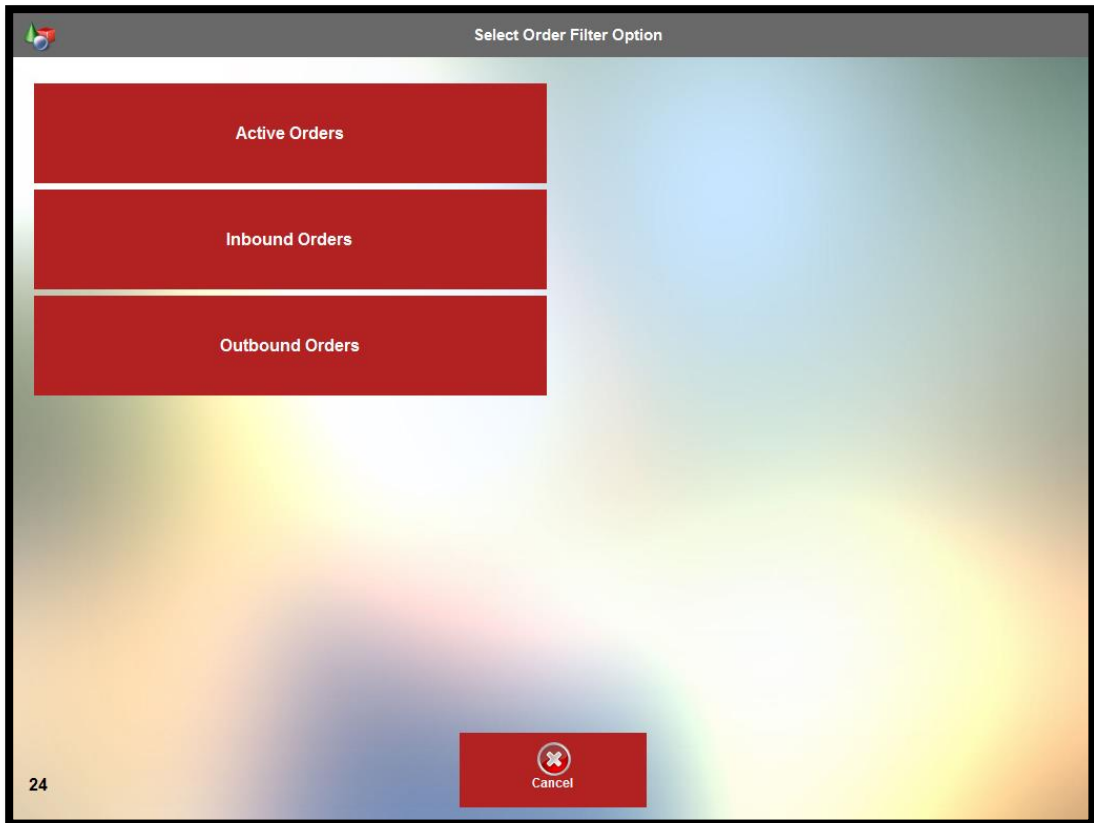


Figure 2-12

## 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 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 if you wish to exit the Select Recall Date window without making any changes (See Figure 2-13).



**Figure 2-13**

## 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 (See Figure 2-14).

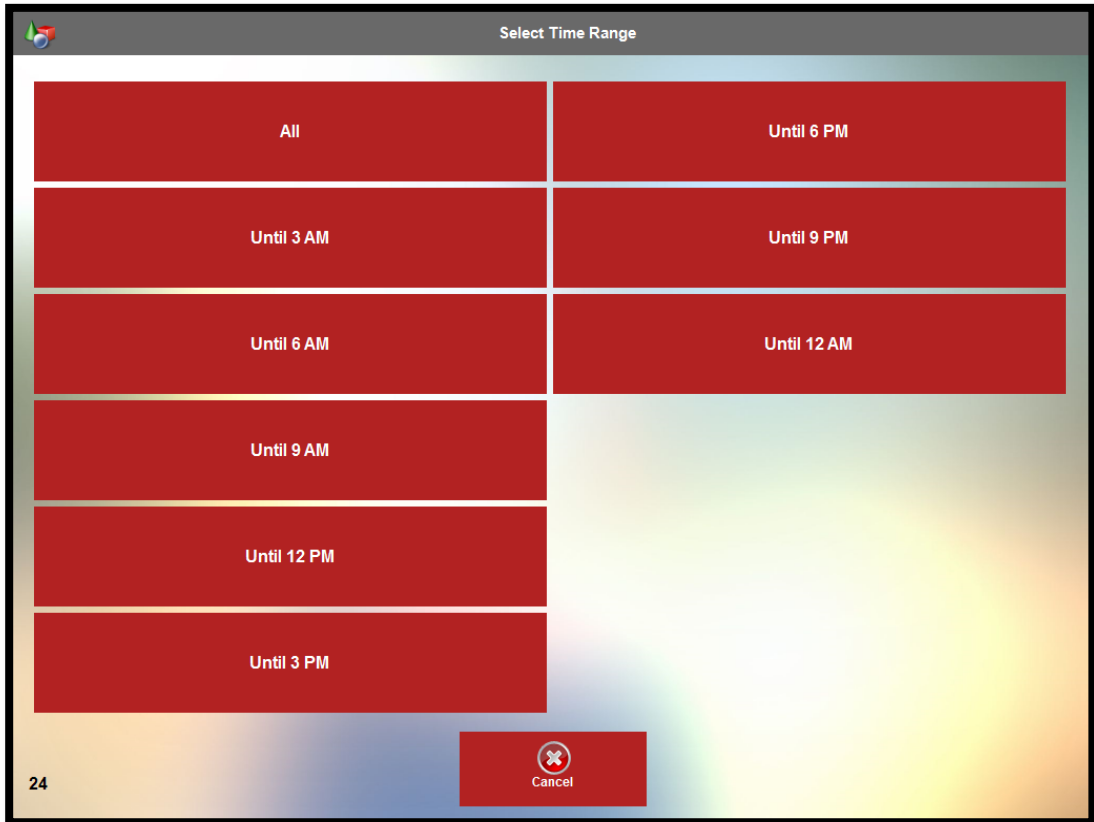


Figure 2-14

### Search Any

Click the “Search Any” button if you wish to search for a specific order by order number, ticket number, customer name, or table number. Clicking the “Search Any” button displays the Search screen. Select your desired search method by clicking its respective button and then use the displayed virtual keyboard to enter the search text. When finished, click the “Search” button at the top of the screen to initiate the search. If you wish to return to the previous screen, click the “Go Back” button. If you wish to delete any text you entered previously via the virtual keyboard and then return to the previous screen, click the “Clear & Exit” button (See Figure 2-15).

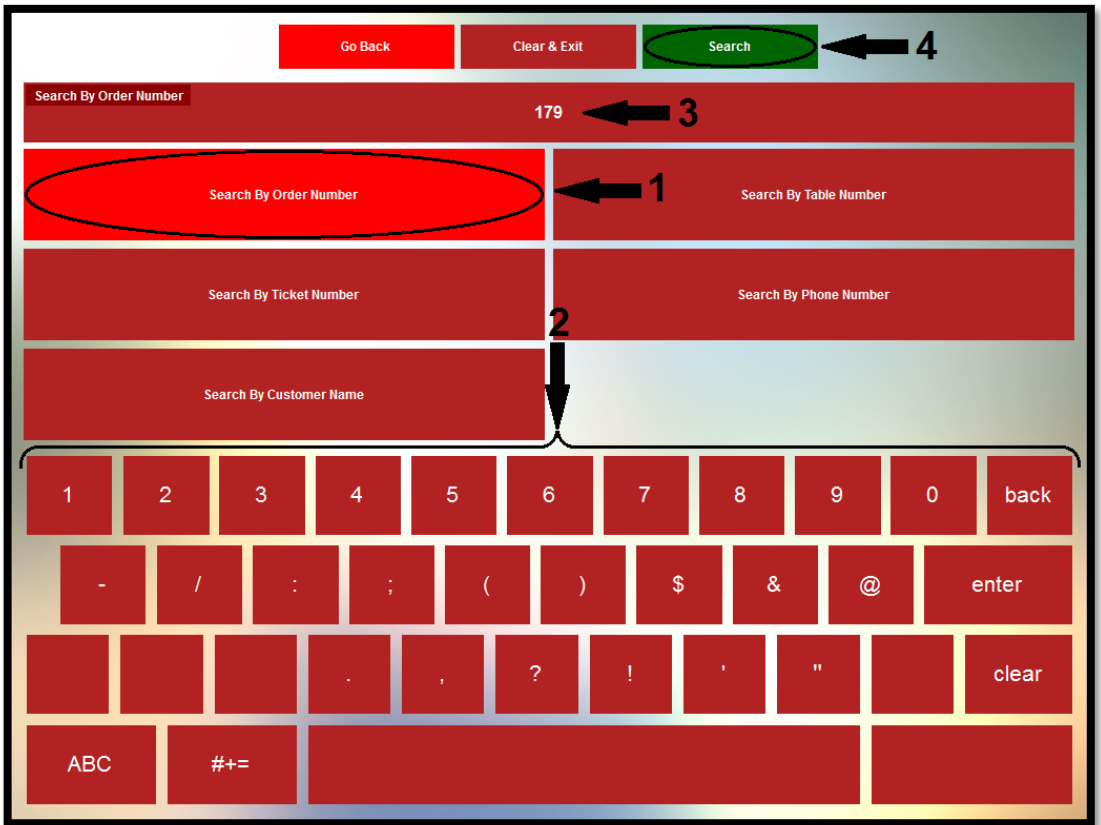


Figure 2-15

## Combine Any

The **Combine Any** feature allows the user to combine two or more orders into a single order. To use the feature, recall the first order that you wish to combine so that it displays in the smart check panel on the left side of the screen. Next, click the “Combine Any” button and then select the order that you wish to combine with the first one by clicking its respective button on the right side of the screen. On the confirmation screen that follows, click the “Accept” button to complete the order combination (See Figure 2-16).

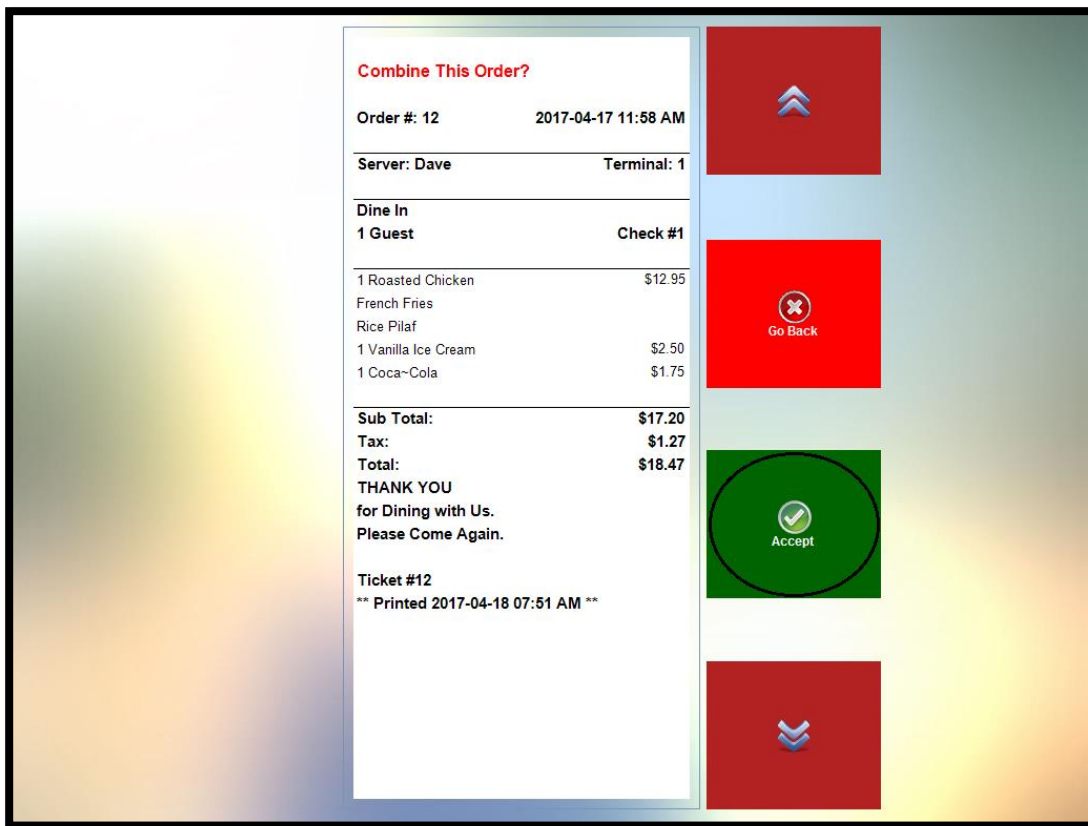


Figure 2-16

Continue in this manner until you have combined all desired orders into a single order.

## 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. In the list of orders that displays, find the order that you wish to re-open and click on it to display it

in the Smart Check panel 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 has already closed his cash drawer or server bank, then the check may not be re-opened.





# Chapter 3

## Settle

Once a customer order is complete, it may be settled at any time. To settle a customer order, it must first be recalled so that the order displays on the left portion of the screen. Click the “Recall” button and then click the button corresponding to the order you wish to settle (See Figure 3-1).

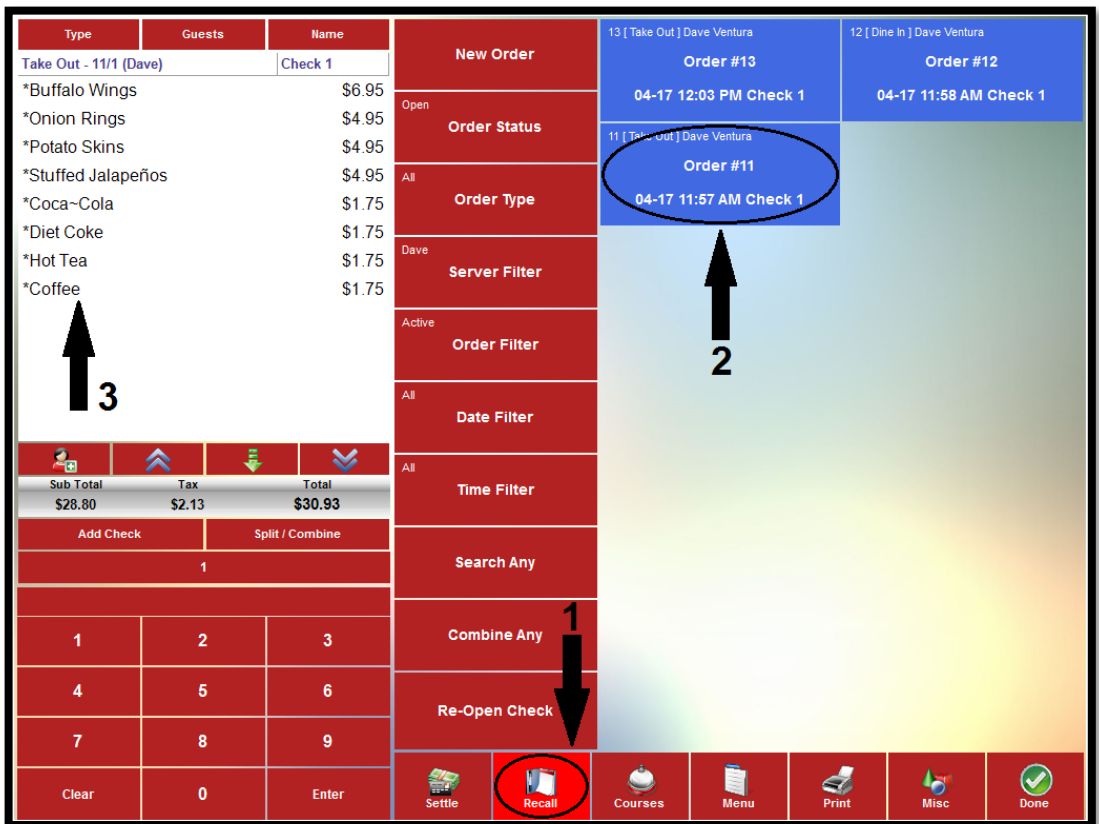


Figure 3-1

Next, select the “Settle” button to display the tender types that are available for settling the order (please note that 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 3-2).



**Figure 3-2**

## 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 still 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 below 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 still 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 in the order on the left side of the screen. The settlement of the order is now complete (See Figure 3-3).

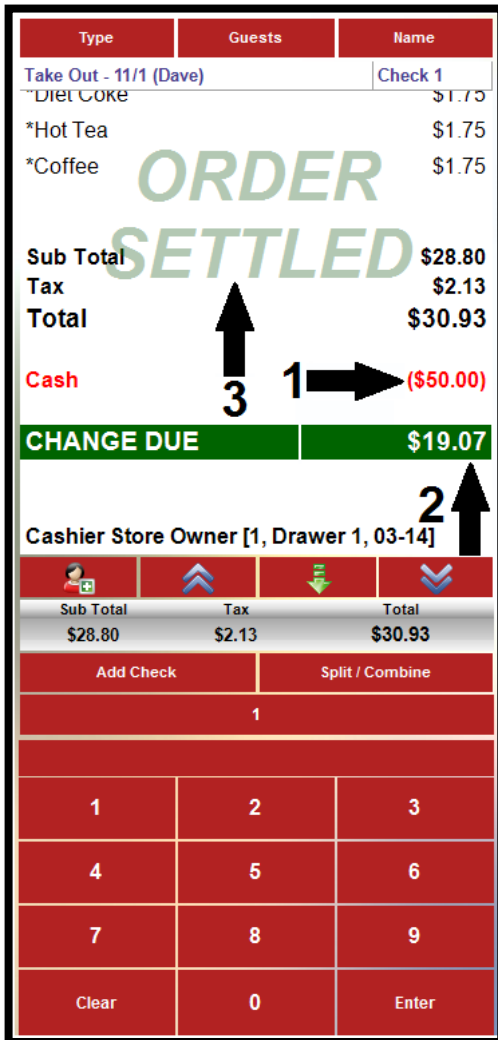


Figure 3-3

## 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 services 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 below the guest check before swiping the credit card through the MSR device (to settle for the exact amount of the guest check, simply click the "Enter" button on the virtual keypad to accept the default amount). Upon swiping the card, Aldelo® EDC applies the amount the user entered to the guest check and sends the transaction to your merchant services provider for processing. The user must then select another payment method to settle the guest check's remaining balance.

## Settling with a Gift Card

Settling an order with a gift card issued by your merchant services 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 services 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 value is not sufficient to settle the order, then that remaining gift card value is applied to the amount of the order and the user must then ask the customer for an alternate method of payment to settle the order's remaining balance.

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 below the 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 services provider for processing. The user must then select another payment method to settle the guest check's remaining balance.

For further information on tender types, please see the XERA® POS Manager Manual.

---

# Chapter 4

## 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 arrow 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 Courses [Add New Record] 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. 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 guest check labeled Course Not Assigned (See Figure 4-1).





| Type  | Guests | Name                     |
|---|--------|--------------------------|
| Dine In - New/1 (Dave)  |        | Check 1                  |
| <b>Appetizers</b>   |        |                          |
|   |        | Stuffed Jalapeños \$4.95 |
| <b>Main</b>   |        |                          |
|   |        | Roasted Chicken \$12.95  |
|   |        | Rice Pilaf               |
|   |        | Steamed Vegetables       |
| <b>Dessert</b>  |        |                          |
|   |        | Cheese Cake \$3.95       |
| <b>Course Not Assigned</b>  |        |                          |
|   |        | Coca~Cola \$1.75         |
| <div style="display: flex; justify-content: space-around; align-items: center;">     </div> |        |                          |
| Sub Total   | Tax    | Total                    |
| \$23.60   | \$1.75 | \$25.35                  |
| Add Check   |        | Split / Combine          |
| 1   |        |                          |
| 1   | 2      | 3                        |
| 4   | 5      | 6                        |
| 7   | 8      | 9                        |
| Clear   | 0      | Enter                    |

Figure 4-1

### **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 button. The courses are numbered in ascending order from top to bottom on the screen and the currently selected course number may be viewed in the upper-left corner of the “Courses” button (See Figure 4-2).

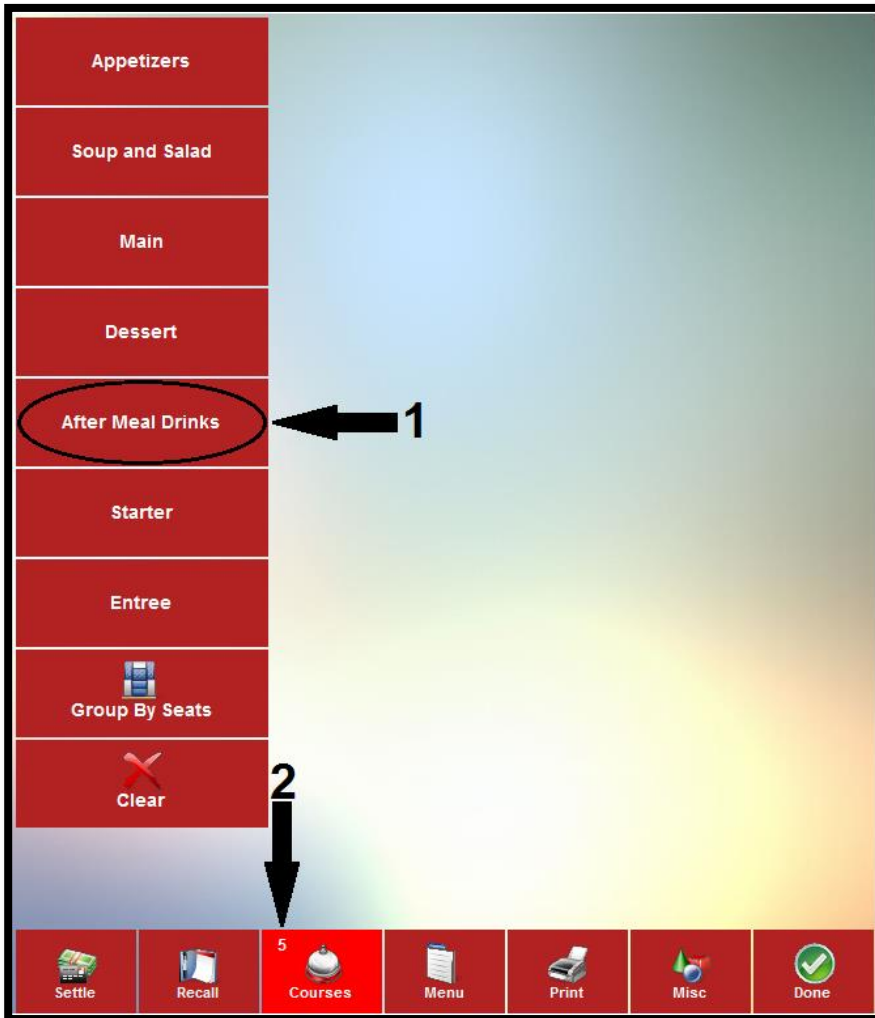


Figure 4-2



Next, select the customer’s desired menu items as usual by clicking the appropriate menu group and then selecting the desired menu items. Each menu item selected in this manner appears on the smart check under the selected course name (See Figure 4-3).

| Type                       | Guests | Name                     |
|----------------------------|--------|--------------------------|
| Dine In - New/1 (Dave)     |        | Check 1                  |
| <b>Appetizers</b>          |        |                          |
|                            |        | Stuffed Jalapeños \$4.95 |
| <b>Main</b>                |        |                          |
|                            |        | Roasted Chicken \$12.95  |
|                            |        | Rice Pilaf               |
|                            |        | Steamed Vegetables       |
| <b>Dessert</b>             |        |                          |
|                            |        | Cheese Cake \$3.95       |
| <b>After Meal Drinks</b>   |        |                          |
|                            |        | Coffee \$1.75            |
| <b>Course Not Assigned</b> |        |                          |
|                            |        | Coca-Cola \$1.75         |

| Sub Total | Tax    | Total   |
|-----------|--------|---------|
| \$25.35   | \$1.87 | \$27.22 |

| Add Check |  | Split / Combine |  |
|-----------|--|-----------------|--|
| 1         |  |                 |  |

|       |   |       |
|-------|---|-------|
| 1     | 2 | 3     |
| 4     | 5 | 6     |
| 7     | 8 | 9     |
| Clear | 0 | Enter |


  

|        |        |           |      |       |      |      |
|--------|--------|-----------|------|-------|------|------|
| Settle | Recall | 5 Courses | Menu | Print | Misc | Done |
|--------|--------|-----------|------|-------|------|------|

Figure 4-3

**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. 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 4-4).



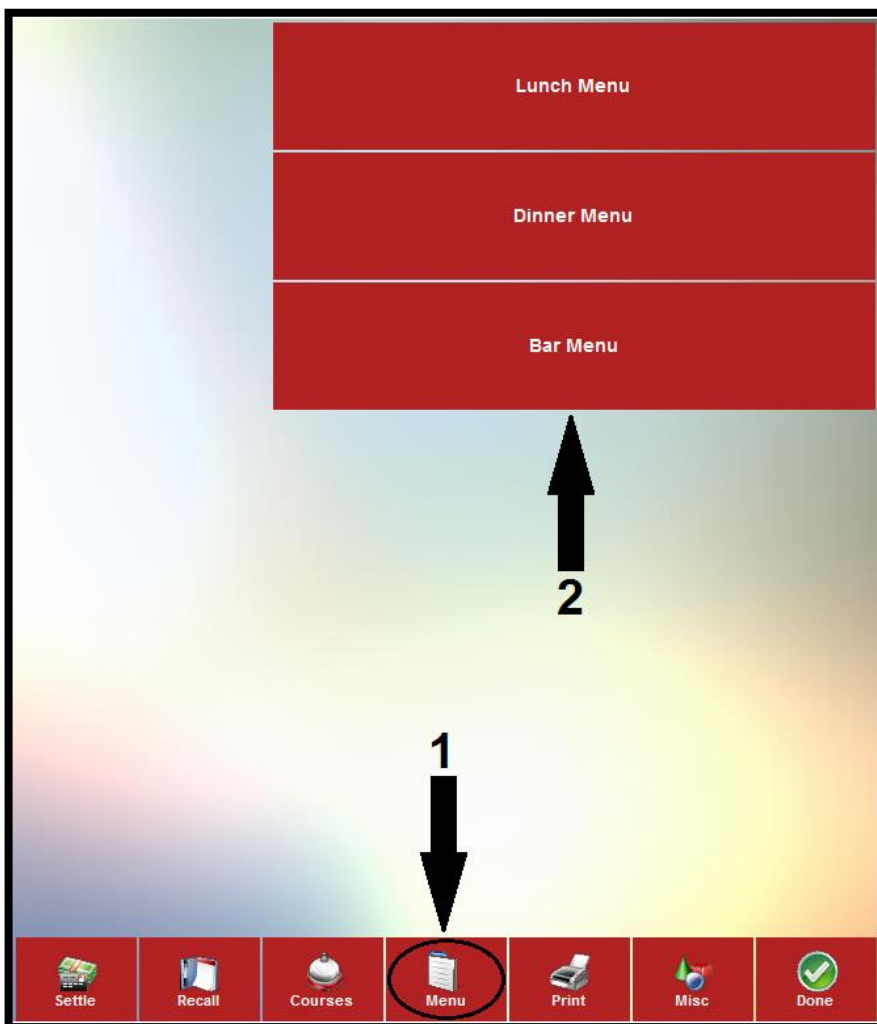
**Figure 4-4**

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 5

## 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 5-1).



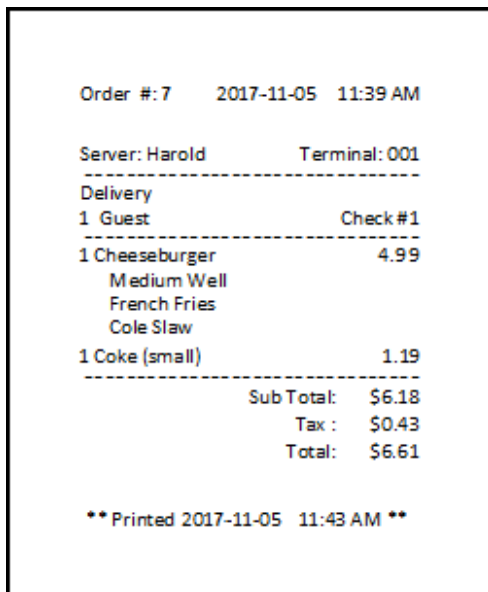
**Figure 5-1**

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.

# Chapter 6

## Print

The **Print** feature allows the user to print the contents of the guest check that is currently displayed on the screen. To print the guest check, simply select the “Print” button at the bottom of the screen. The information on the guest check prints to the designated receipt printer in the form of a customer receipt (See Figure 6-1).



**Figure 6-1**



# Chapter 7

## 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 features (See Figure 7-1).

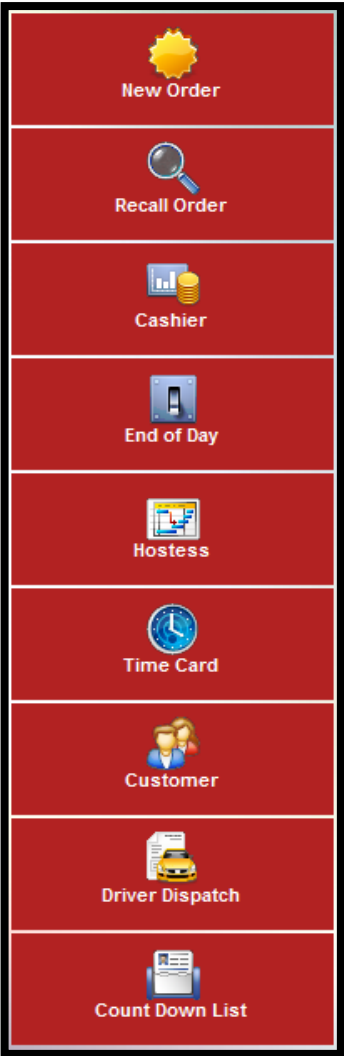


Figure 7-1

## 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 18 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 17 of this manual.

## Cashier

Select the Cashier button to access the **Cashier** features of XERA<sup>®</sup> 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<sup>®</sup> 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<sup>®</sup> 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 14 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.

On the Pay In screen, click the “Pay In” button, choose the currency type you are adding to the cash drawer by clicking on it, and then enter the amount by using the virtual keypad at the bottom of the screen. The amount entered appears in the Pay In Amount field, directly above the virtual keypad. Be sure to click the “Pay” button when finished (See Figure 7-2).

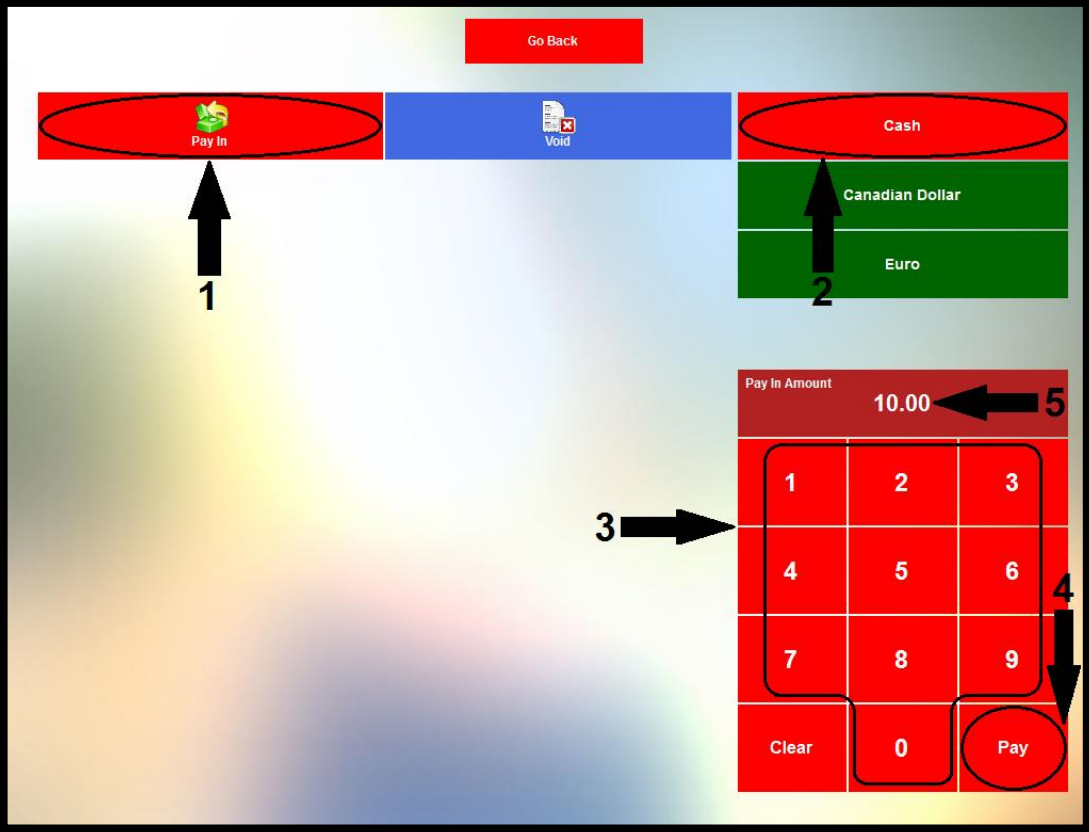
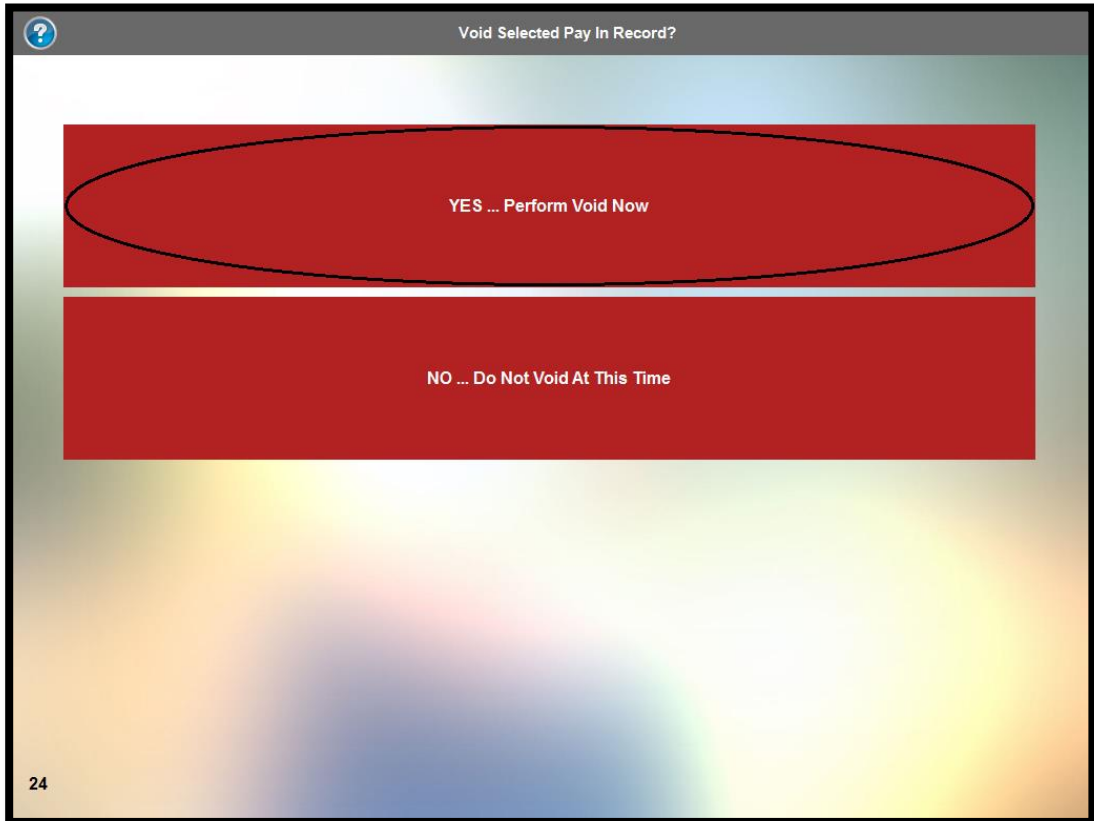


Figure 7-2

**Void**

To void a previous Pay In transaction, click the “Void” button to display a list of the previous transactions. Select the appropriate transaction from this list by clicking on it. On the confirmation window that appears, click the “Yes ... Perform Void Now” button to complete the void of the Pay In transaction (See Figure 7-3).



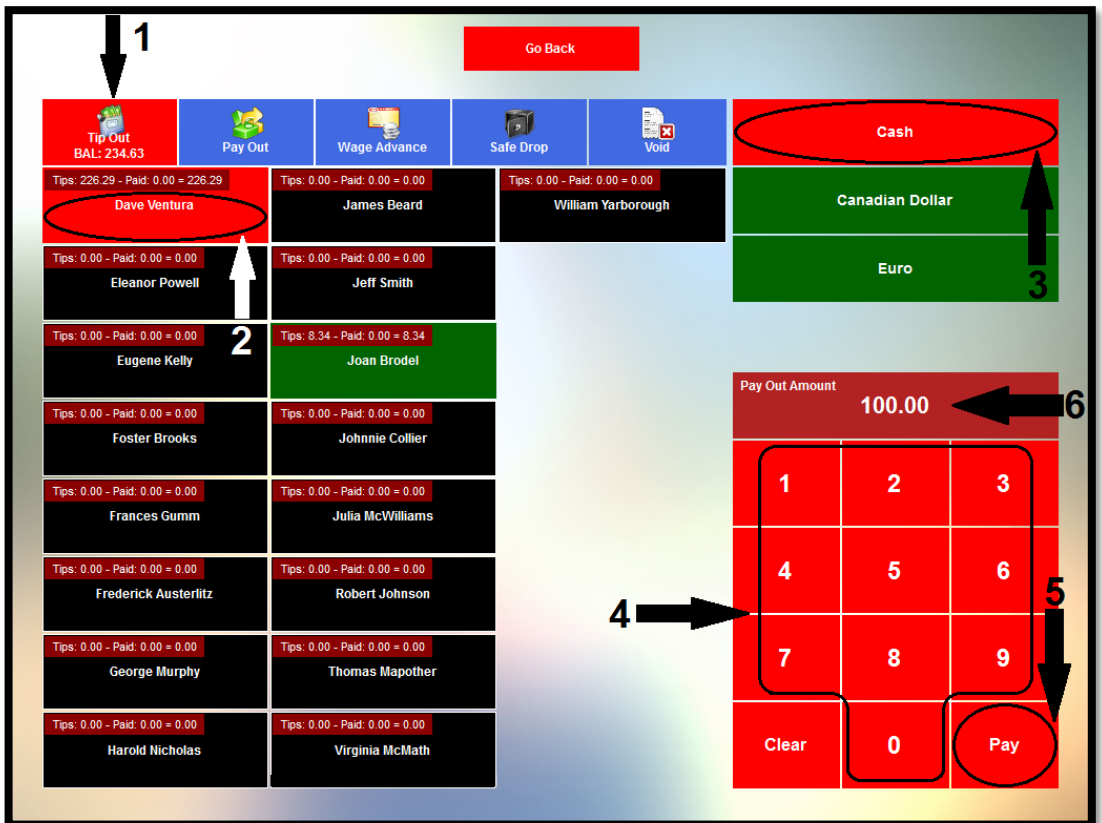
**Figure 7-3**

**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.

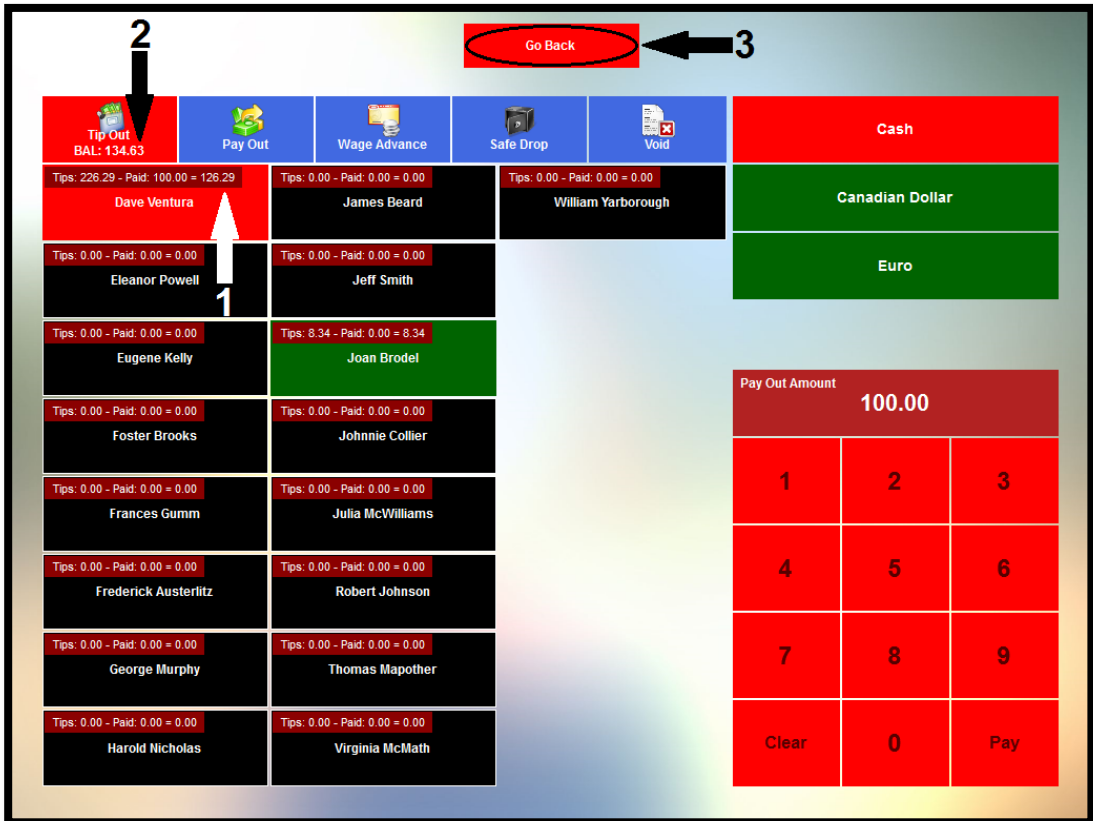
**Tip Out**

The **Tip Out** feature of XERA® POS allows the employee to immediately collect the gratuities that he earned during his shift. 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 to the employee via the credit card method of payment. Next, select the employee name by clicking the appropriate button. Finally, enter the amount to pay by using the virtual numeric keypad at the bottom-right of the screen. As you enter it, this amount displays in the Pay Out Amount field directly above the numeric keypad. When finished, click the “Pay” button and collect this amount from the cash in the employee’s cash tray (See Figure 7-4).



**Figure 7-4**

Once the “Pay” button on the virtual keypad is clicked, the amount collected by the employee appears on the face of the employee’s button and the new remaining tip pool balance appears on the face of the “Tip Out” button. When finished, click the “Go Back” button to return to the previous screen (See Figure 7-5).



**Figure 7-5**

### 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.

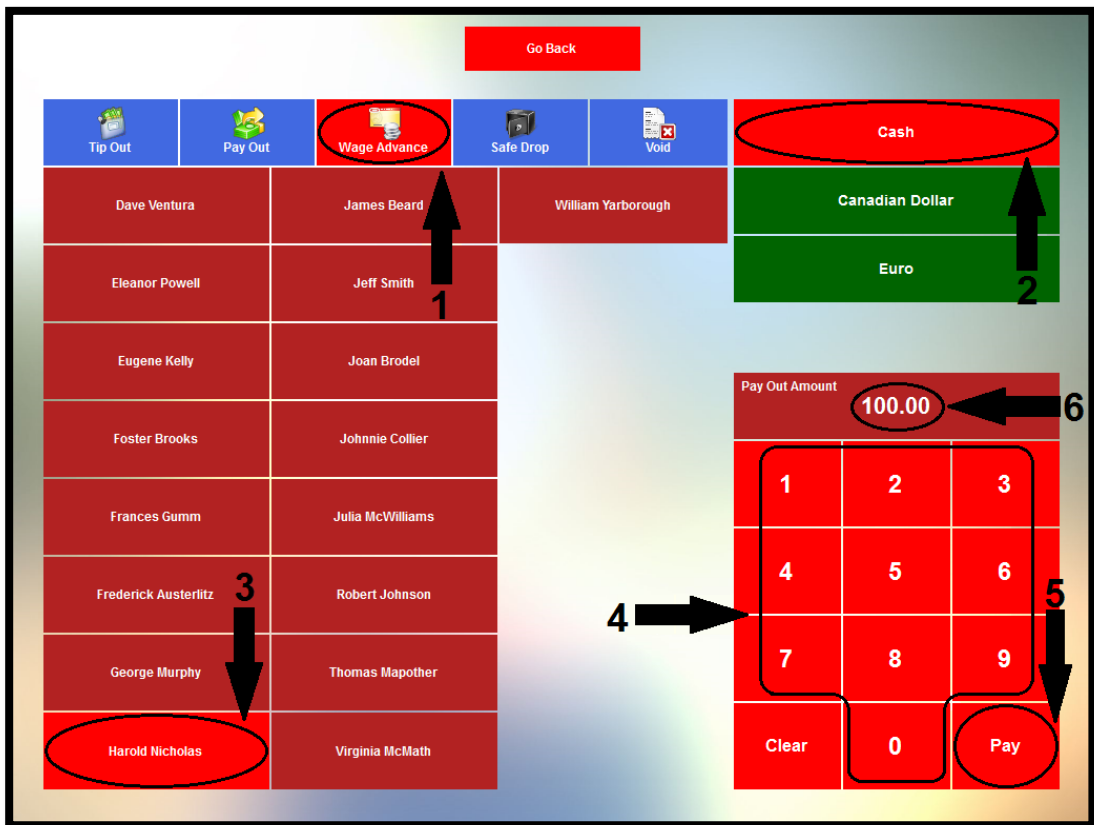
Finally, enter the monetary amount of the pay out by using the virtual keypad displayed in the lower right corner of the Pay Out screen. Be sure to click the “Pay” button when finished (See Figure 7-6).



Figure 7-6

### 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 the button displaying his name on the left side of the screen. Next, click the button that corresponds with the currency type being used to pay the wage advance and then enter the monetary amount of the wage advance by using the virtual keypad displayed in the lower-right portion of the Wage Advance screen. Be sure to click the "Pay" button when finished (See Figure 7-7).

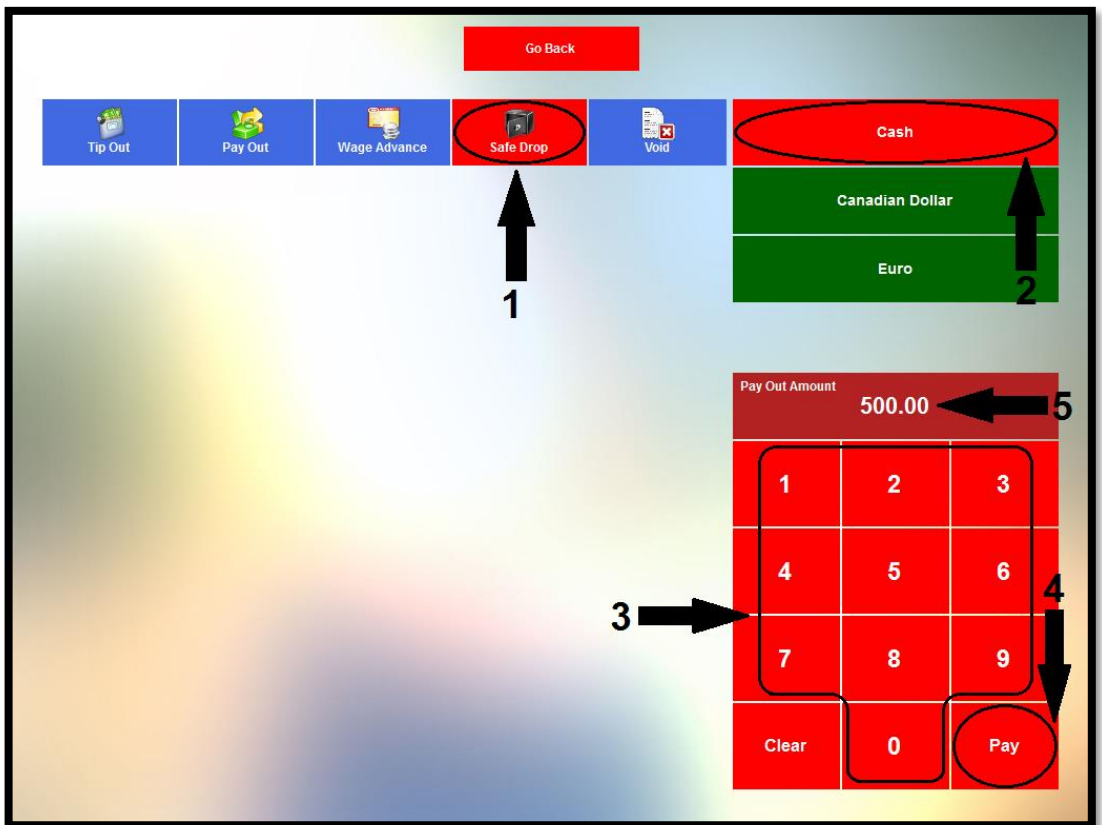


**Figure 7-7**

Finally, be sure to pay the wage advance to the employee from the cash in the cash drawer.

**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 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 7-8).



**Figure 7-8**

## Void

The “Void” button is used to reverse a previous Pay Out transaction. To void a Pay Out transaction, click the “Void” button and then select the transaction you wish to void by clicking on its respective button in the grid (See Figure 7-9).

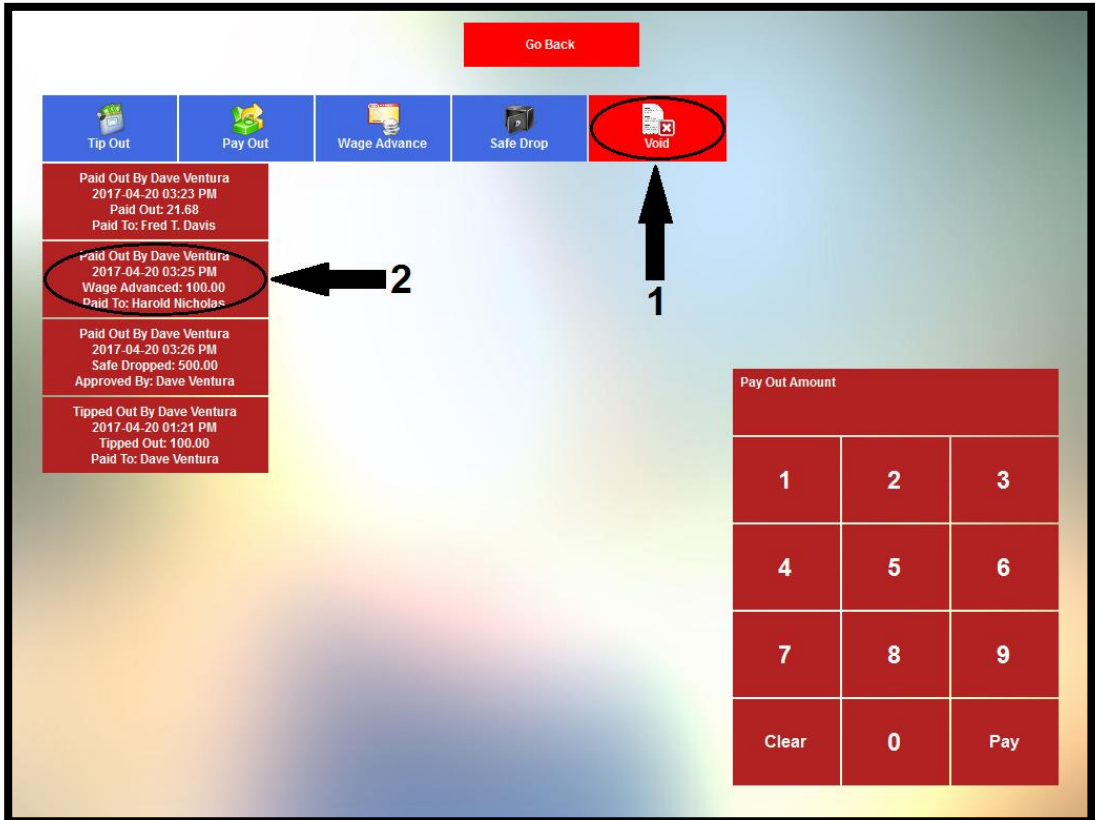


Figure 7-9



On the confirmation window that appears, click the “Yes ... Perform Void Now” button to complete the void of the Pay Out transaction (See Figure 7-10).

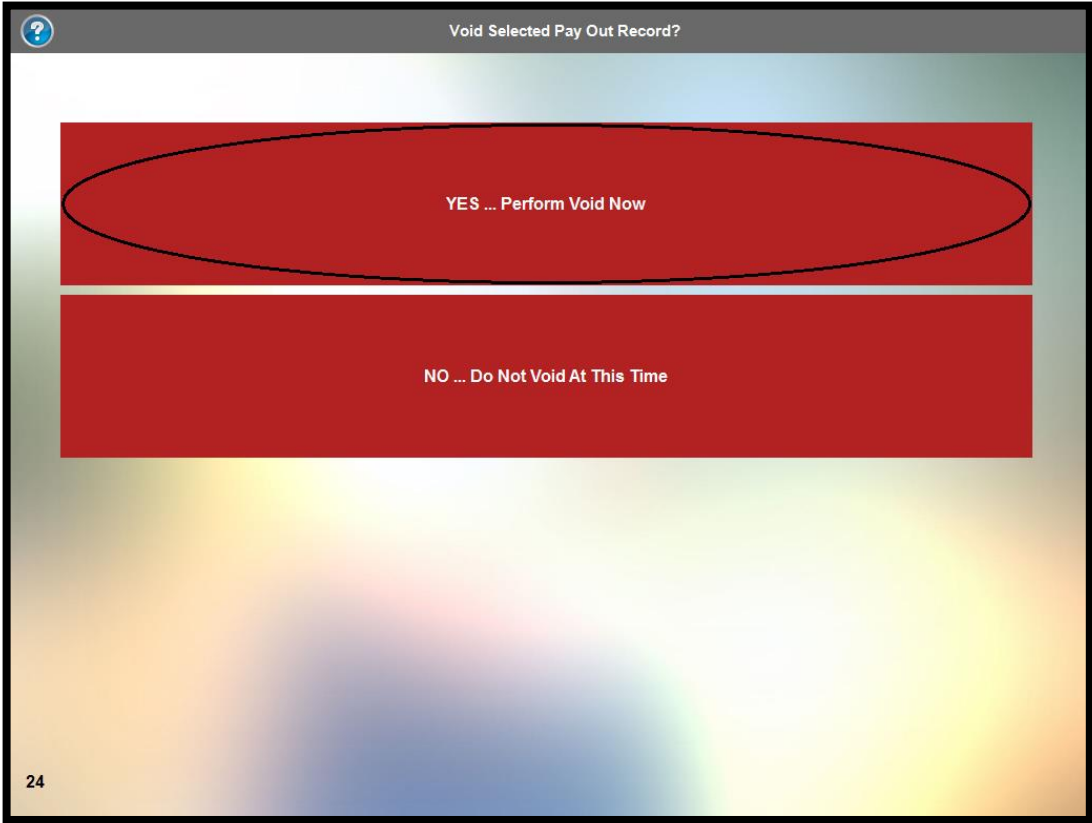
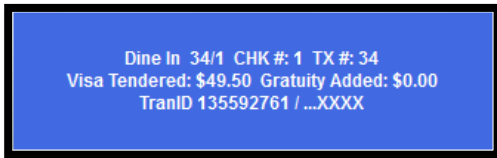


Figure 7-10

**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 displaying a blue background indicates that no gratuity exists for the guest check [See Figure 7-11]).

**Figure 7-11**

Clicking a guest check button enables the virtual keypad. Enter the new gratuity amount through this keypad. As the new gratuity amount is entered, it displays on the screen in the New Gratuity field, directly above the keypad. Click the keypad's "Enter" button when finished (See Figure 7-12).

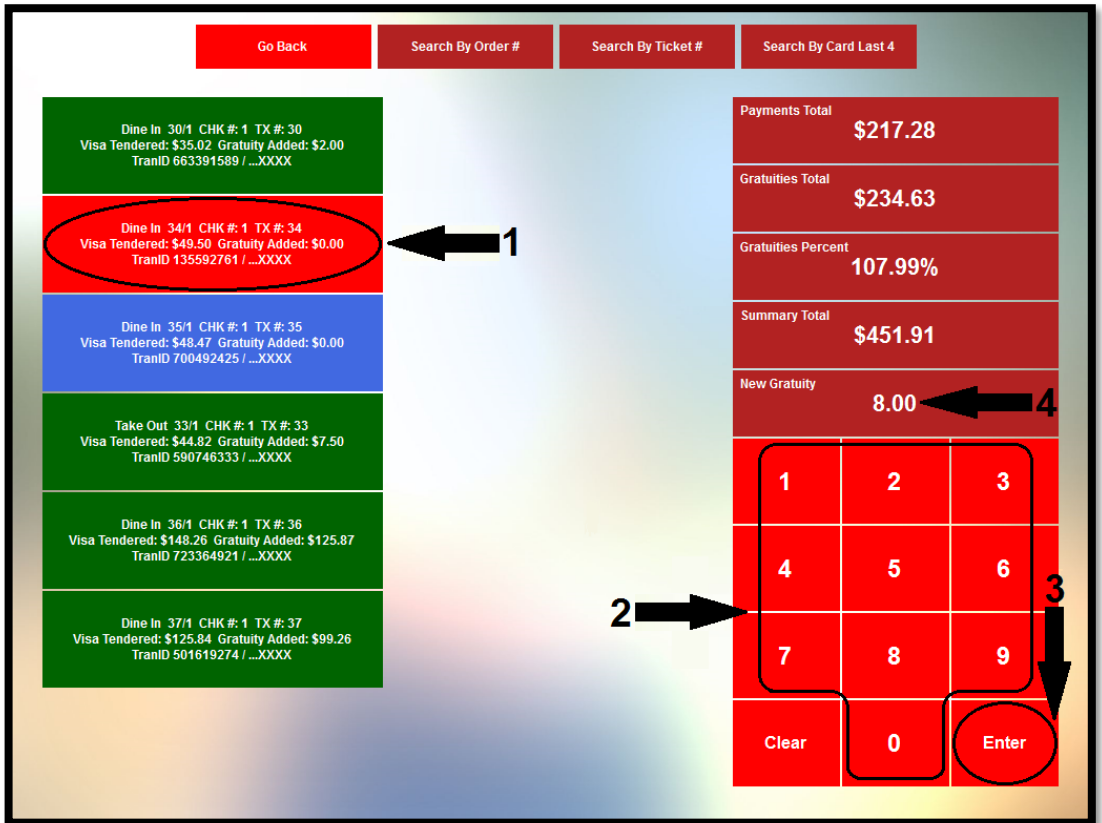
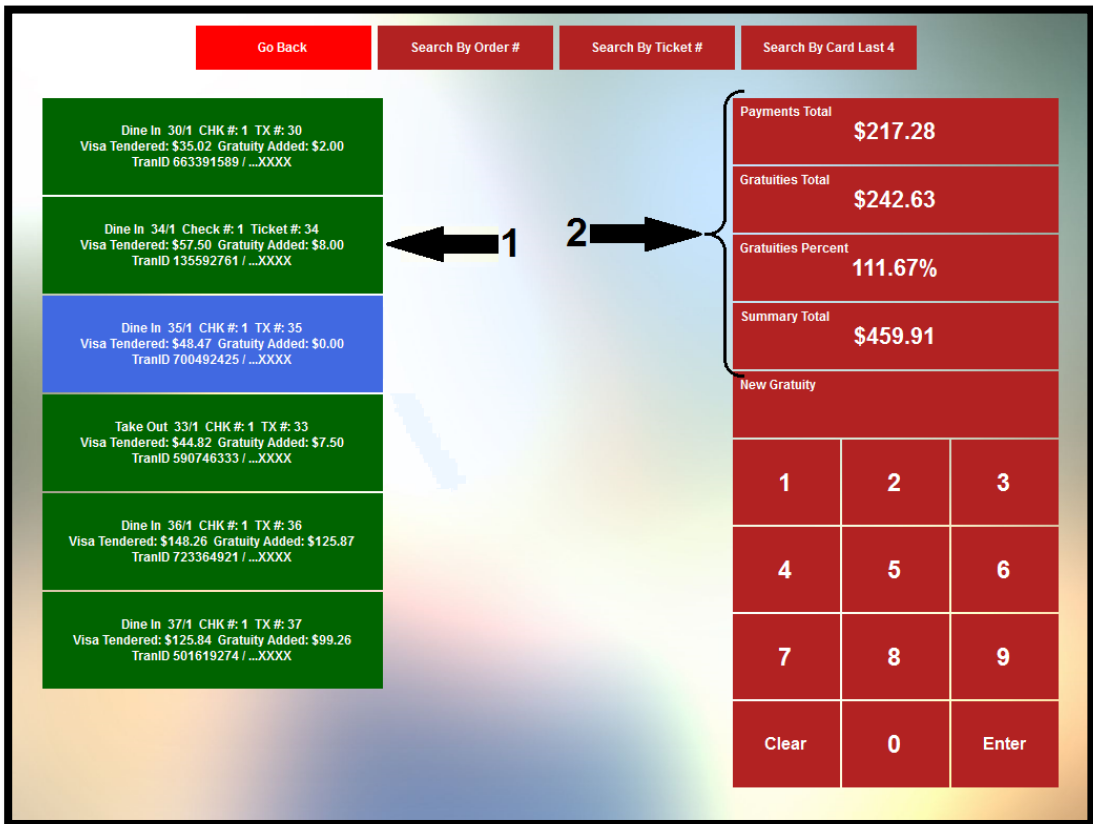


Figure 7-12

Upon clicking the “Enter” 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 7-13).

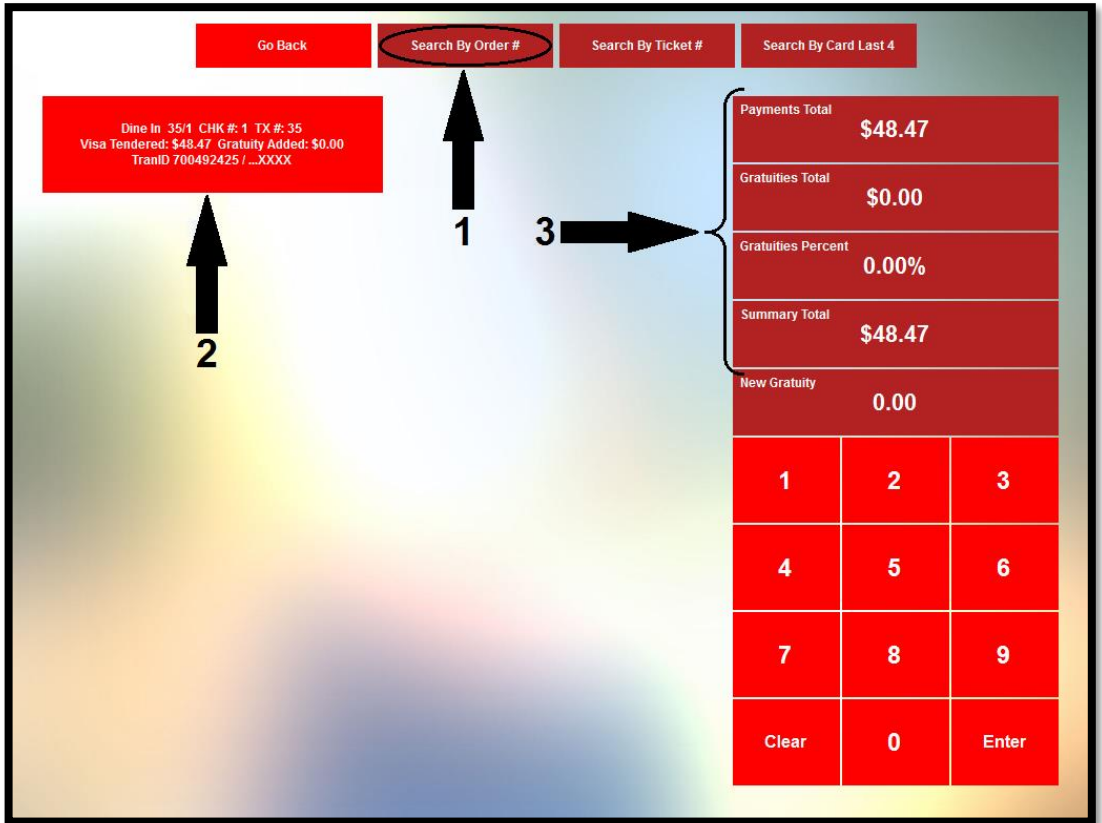


**Figure 7-13**

When finished editing the gratuity, click the “Go Back” button to return to the previous screen.

**Search by Order #**

To find an order by the order number, click the “Search by Order #” 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 in the grid that shows the existing order information. A summary of the existing order information 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 7-14).



**Figure 7-14**

When finished editing the gratuity, click the “Go Back” button to return to the previous screen.

**Search by Ticket #**

To find an order by the ticket number, click the “Search by Ticket #” button to enable the virtual keypad in the lower-right portion of the screen. Enter the ticket number and then click the “Enter” button on the keypad. If the order is found, a button displays in the grid that shows the existing order

information. A summary of the existing order information also appears in the fields on the right side of the screen. Select the order button and edit the gratuity as described above.

When finished editing the gratuity, click the “Go Back” button to return to the previous screen.

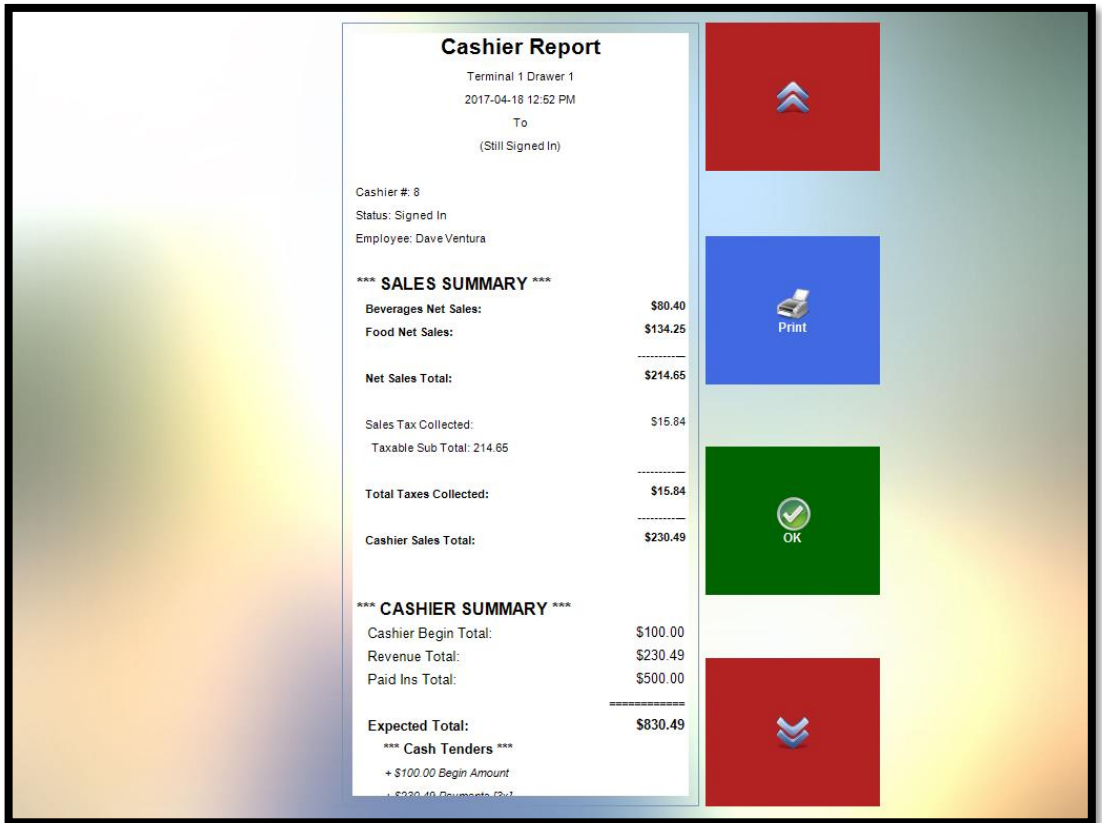
**Search by Card Last 4**

To find an order by the last four digits of the credit card that was used to settle it, click the “Search by Card Last 4” button to enable the virtual keypad in the lower-right portion of the screen. Enter the last four digits of the credit card account number and then click the “Enter” button on the keypad. If the order is found, a button displays in the grid that shows the existing order information. A summary of the existing order information 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 7-14).

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 to the right of the report 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 7-15).



**Figure 7-15**

**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. The following screen asks the user if he wishes to perform the tip out procedure before continuing to the blind close procedure. If so, follow the steps in the **Tip Out** section on page 53 of this manual. 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. To exit this screen without performing the blind close, click the “Abort Blind Close Task” button (See Figure 7-16).

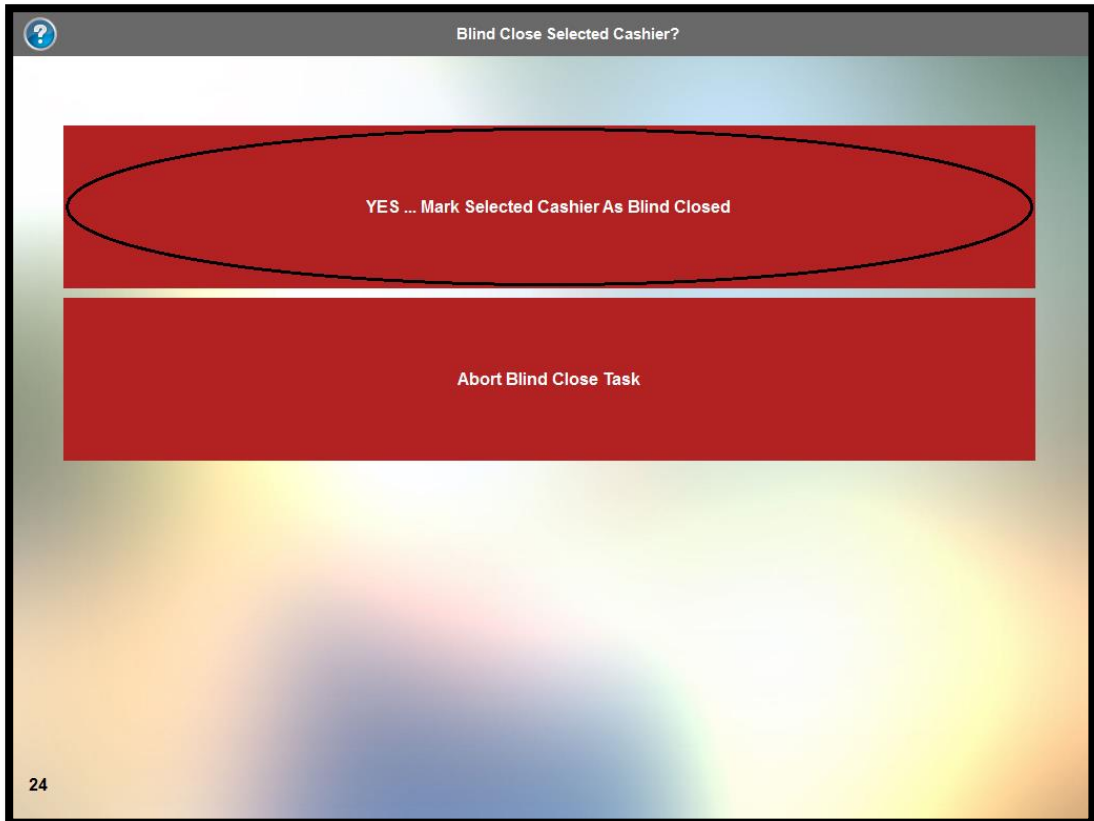
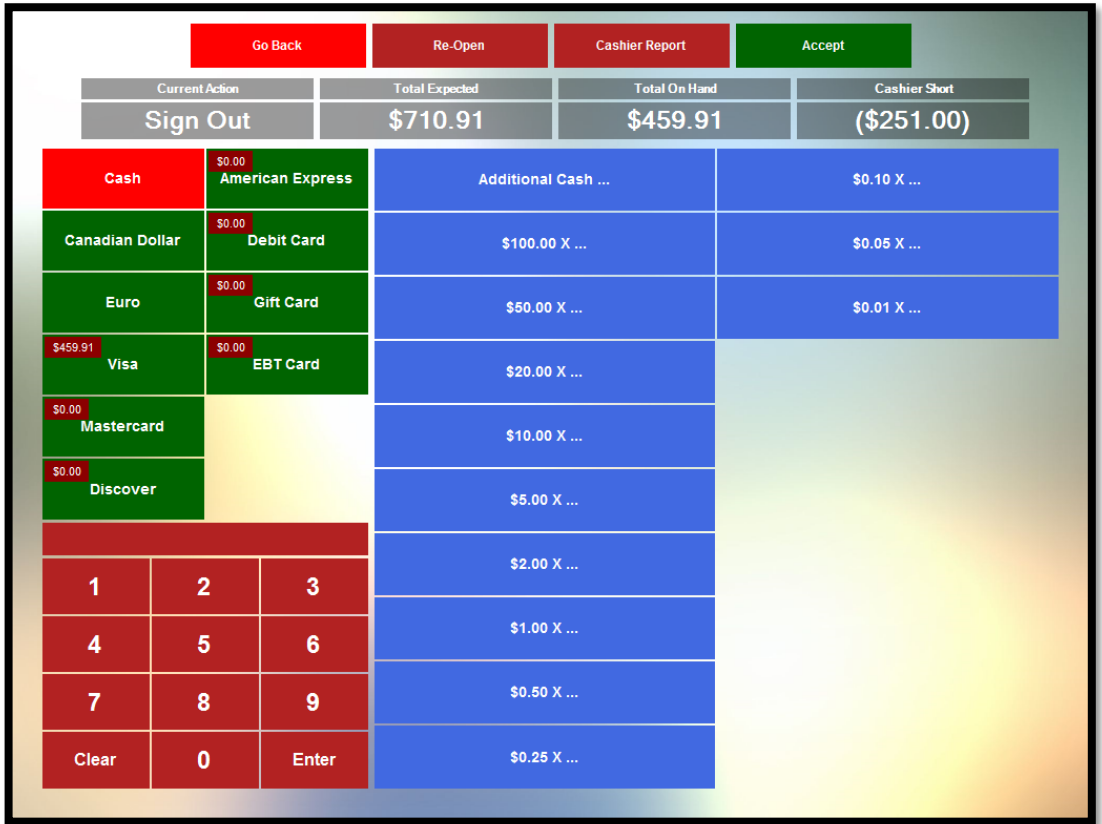


Figure 7-16



**Sign Out**

The **Sign Out** feature allows the user to close and reconcile his cash tray. Click the “Sign Out” button to display the sign out screen (See Figure 7-17).



**Figure 7-17**

**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 “Cash” button to display the cash denomination buttons, 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 keypad’s “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 respective 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. Do this for each tender type. When you are finished 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 (See Figure 7-18).

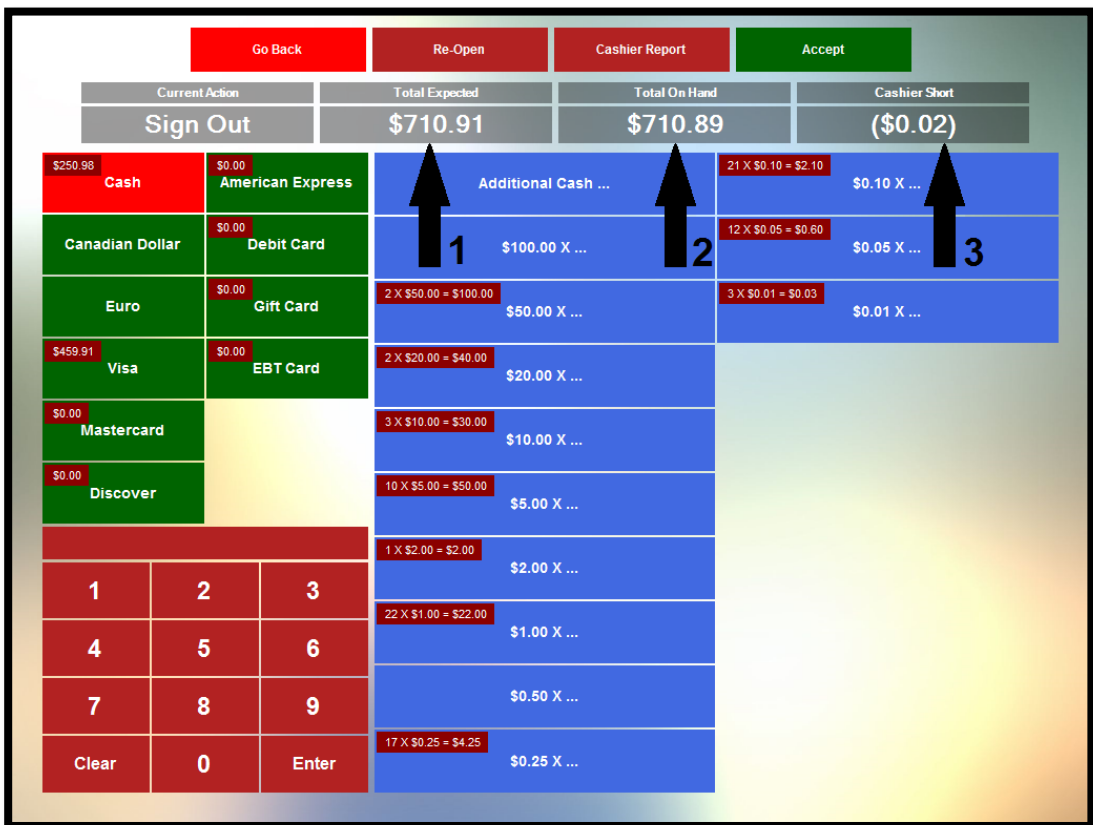


Figure 7-18

### Go Back

Click the “Go Back” button if you wish to cancel the sign out procedure and return to the previous screen.

**Re-Open**

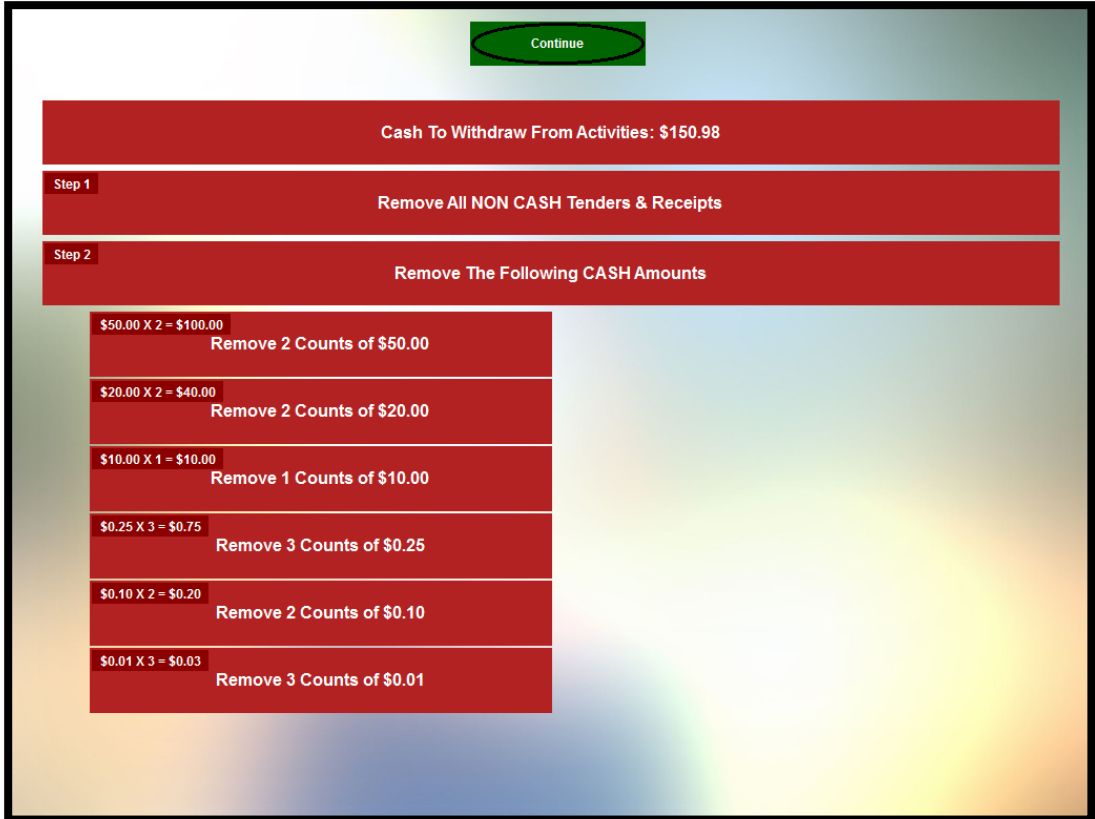
Click the “Re-Open” button if you wish to cancel the sign out procedure and re-open the cash drawer.

**Cashier Report**

Click the “Cashier Report” button to display the current cashier report on the screen. The cashier report is described on page 65 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. This displays the withdrawal screen that shows the user the specific cash tenders, non-cash tenders, and receipts that must be removed from the cash tray to leave the correct starting cash balance in the tray for the next shift. Follow the instructions on this screen and then click the “Continue” button when finished to return to the previous screen (See Figure 7-19).



**Figure 7-19**

### 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 10 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 at 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 7-20).

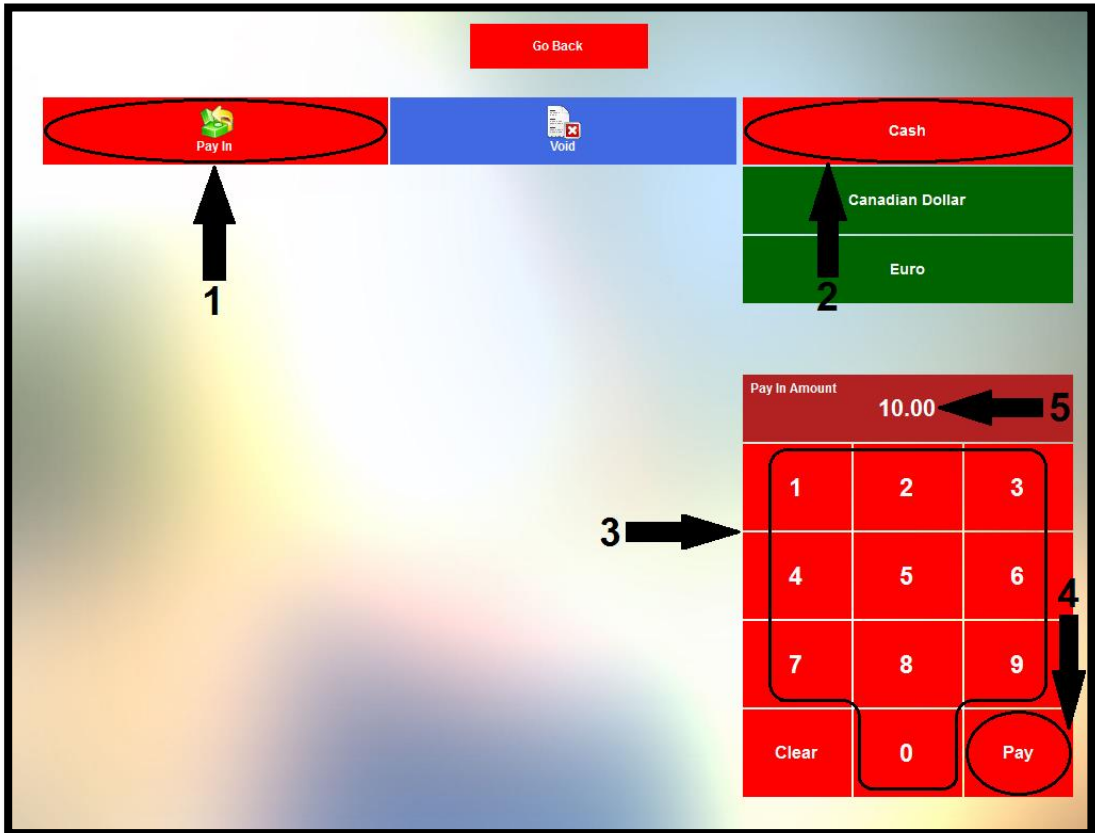
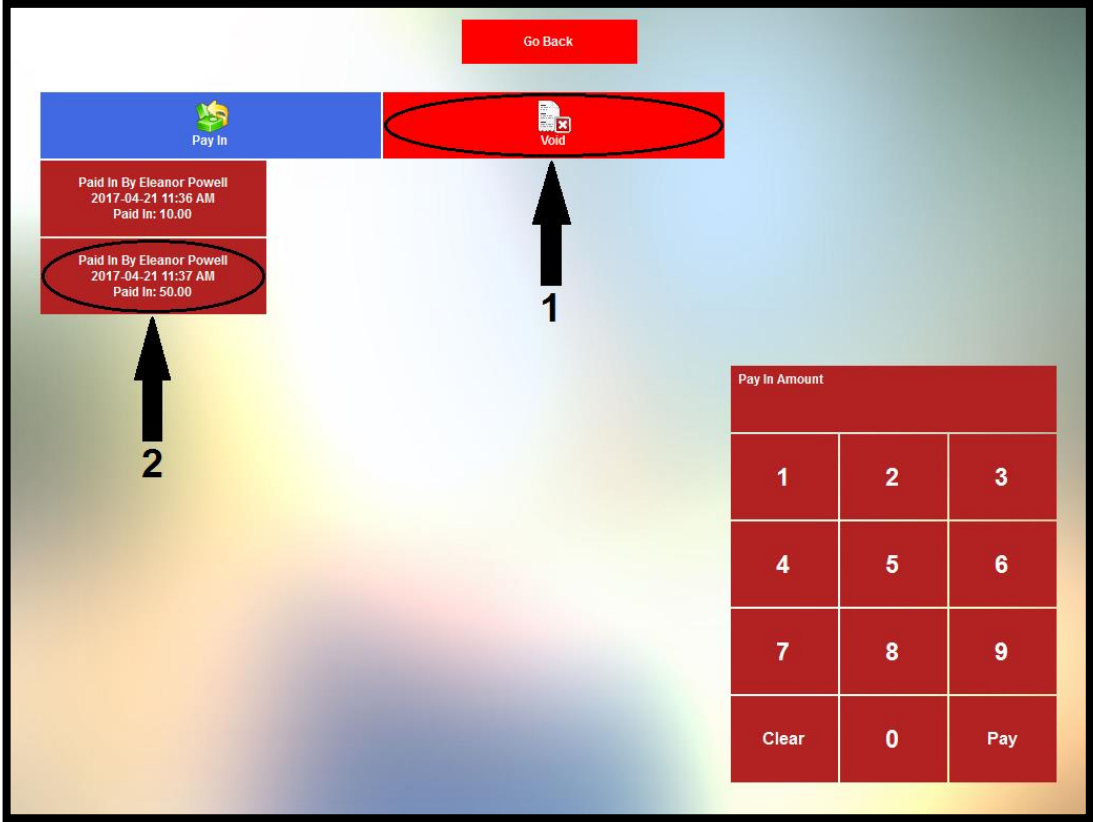


Figure 7-20

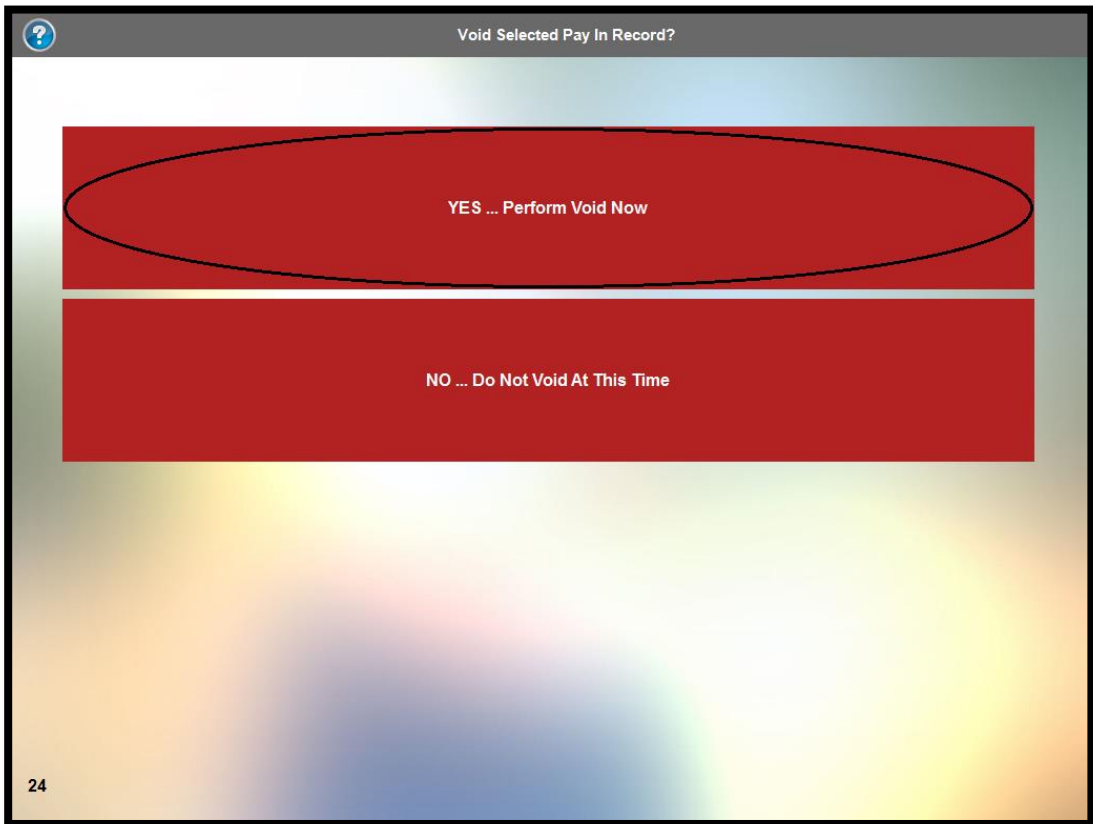
**Void**

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 7-21).



**Figure 7-21**

A confirmation window follows. To finalize the void, select the “YES ... Perform Void Now” button (See Figure 7-22).



**Figure 7-22**

### **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 employee to immediately collect the gratuities that he earned during his shift. 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 to the employee via the credit card method of payment. Next, select the employee name by clicking the appropriate button. Finally, enter the amount to pay by using the virtual numeric keypad at the bottom-right of the screen. As you enter it, this amount displays in the Pay Out Amount field directly above the numeric keypad. When finished, click the “Pay” button and collect this amount from the cash in the employee’s server bank (See Figure 7-23).

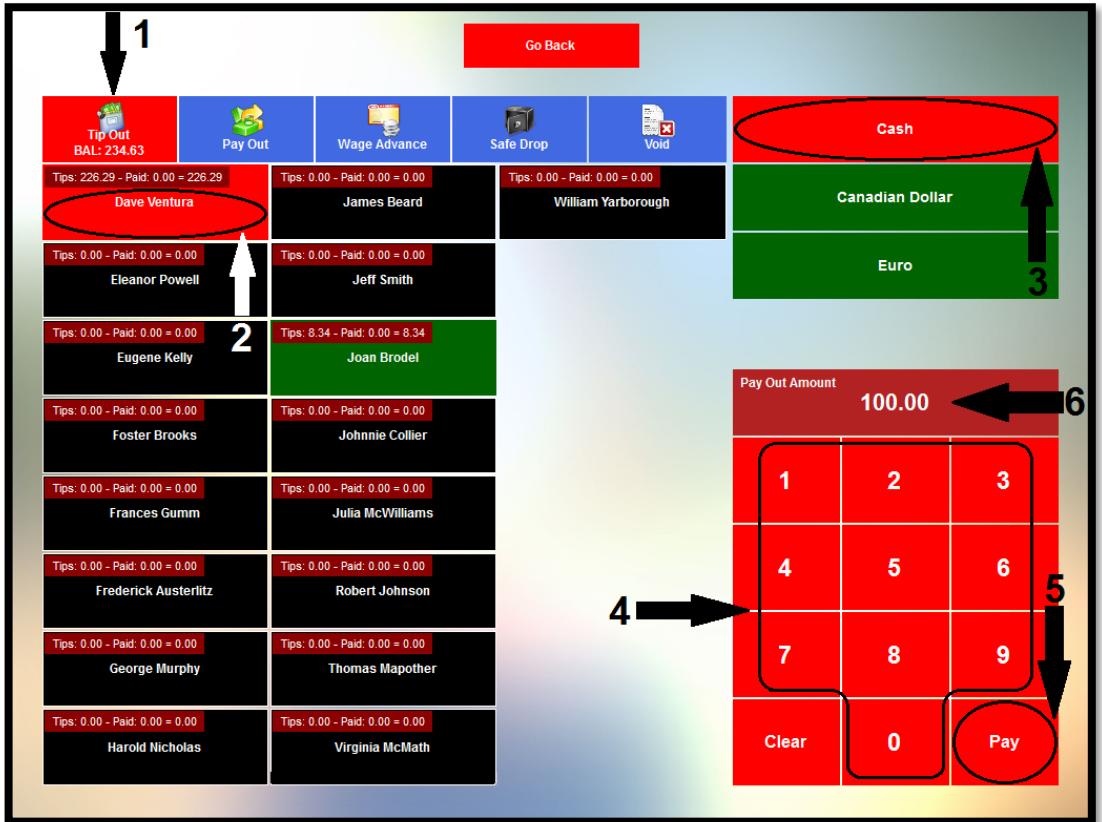
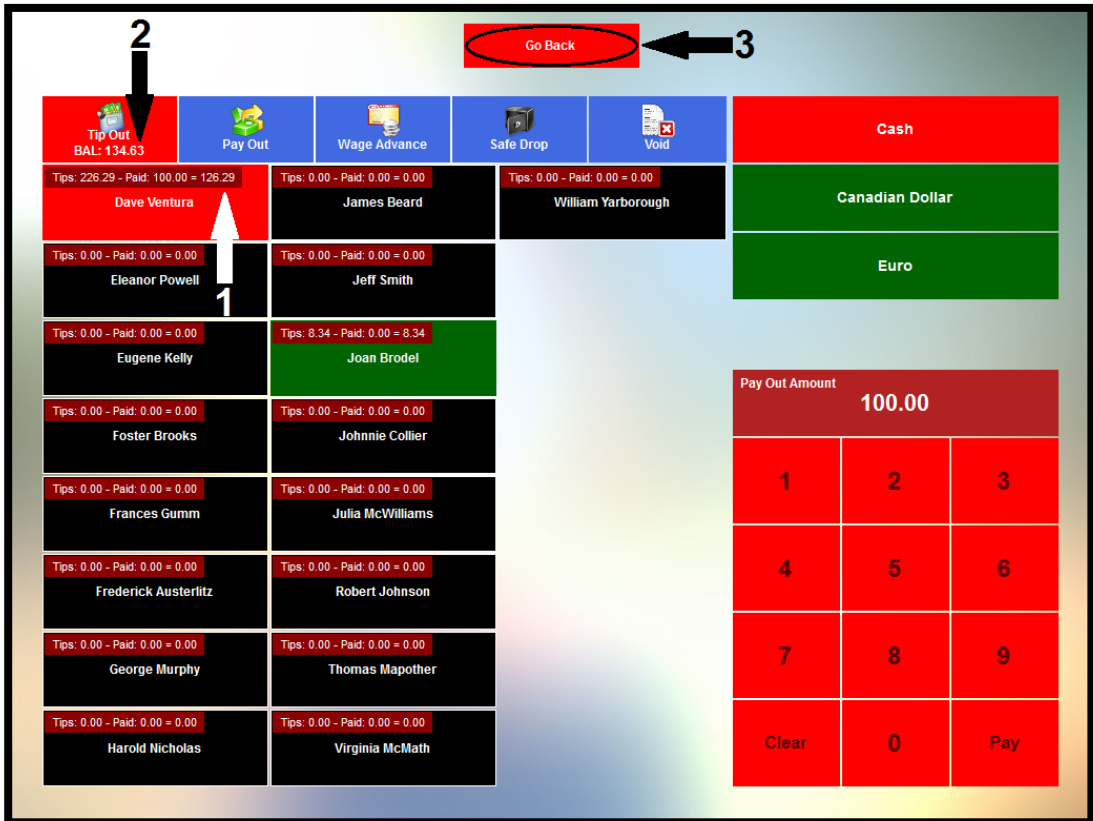


Figure 7-23

Once the “Pay” button on the virtual keypad is clicked, the amount collected by the employee appears on the face of the employee’s button and the new remaining tip pool balance appears on the face of the “Tip Out” button. When finished, click the “Go Back” button to return to the previous screen (See Figure 7-24).



**Figure 7-24**

### 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 pay out by using the virtual keypad in the lower right portion of the Pay Out screen. Be sure to click the “Pay” button when finished (See Figure 7-25).

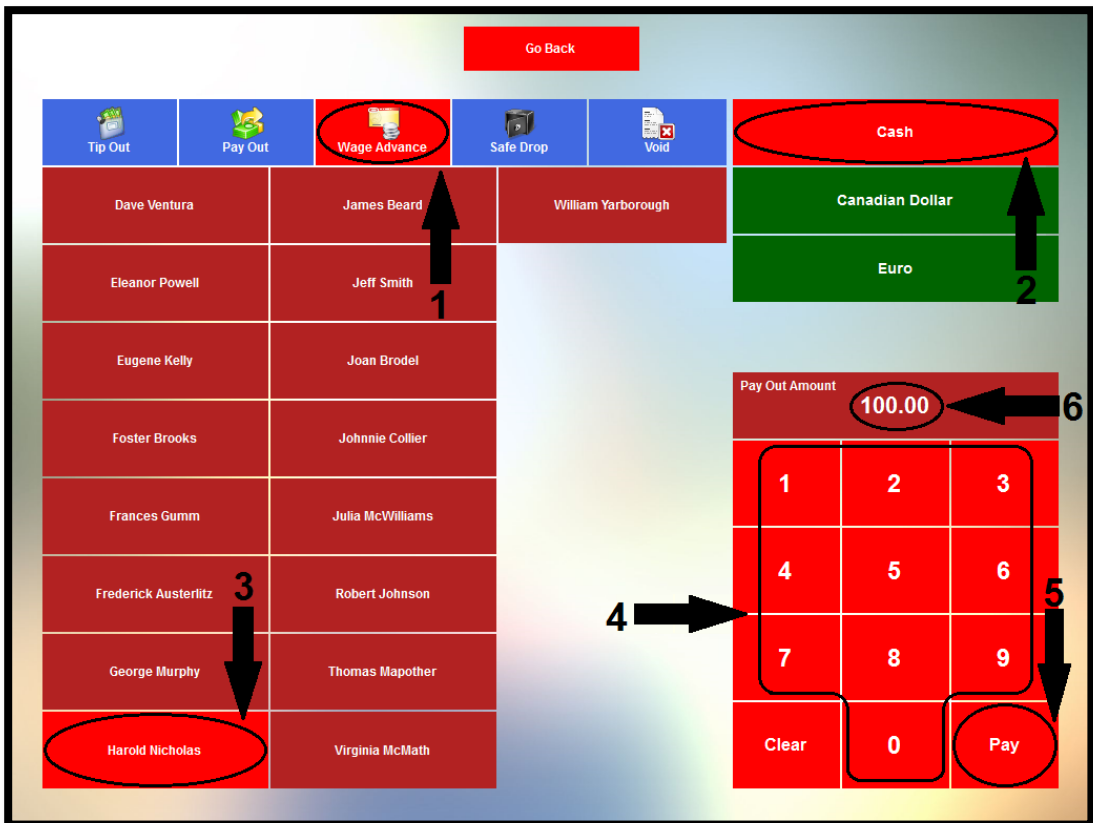


**Figure 7-25**

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 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 7-26).



**Figure 7-26**

When finished, be sure to 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 server bank by clicking the appropriate button on the right side of the screen. Next, remove the excess cash from the employee's server bank. 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 7-27).

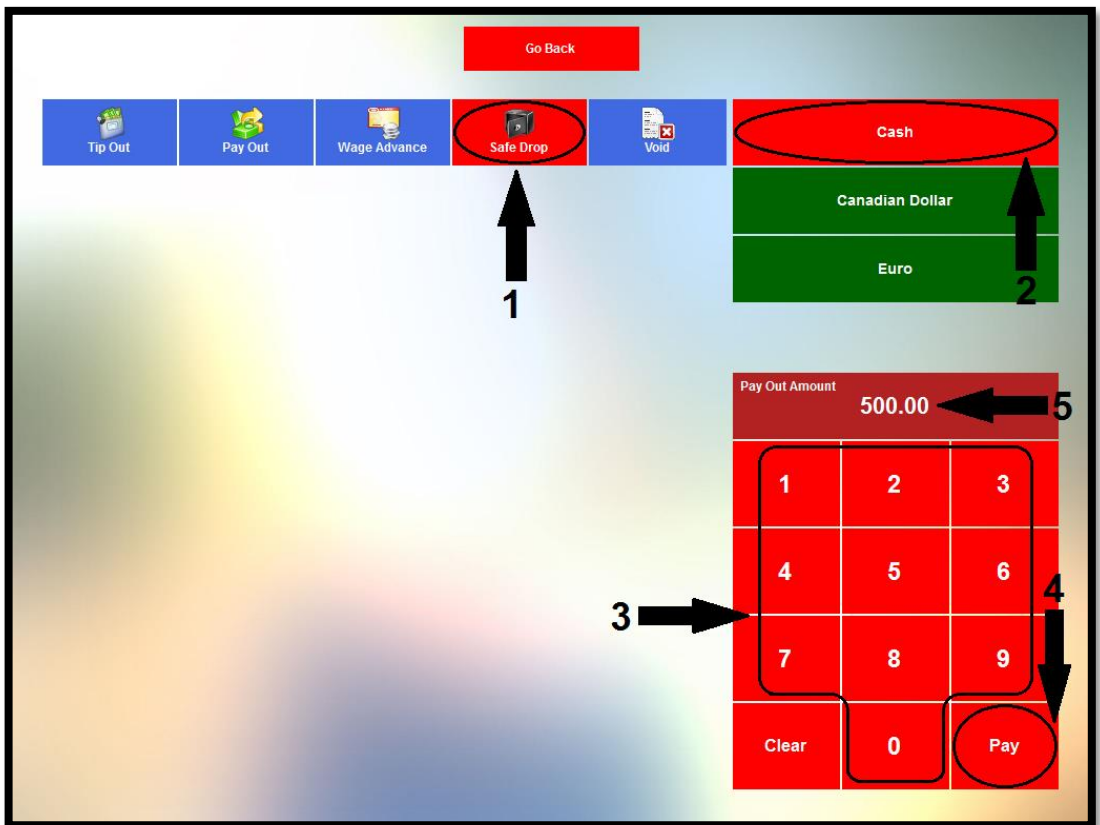


Figure 7-27

## Void

The “Void” button is used to reverse a previous Pay Out transaction. To void a Pay Out transaction, click the “Void” button and then select the Pay Out transaction you wish to void by clicking on its respective button in the grid (See Figure 7-28).

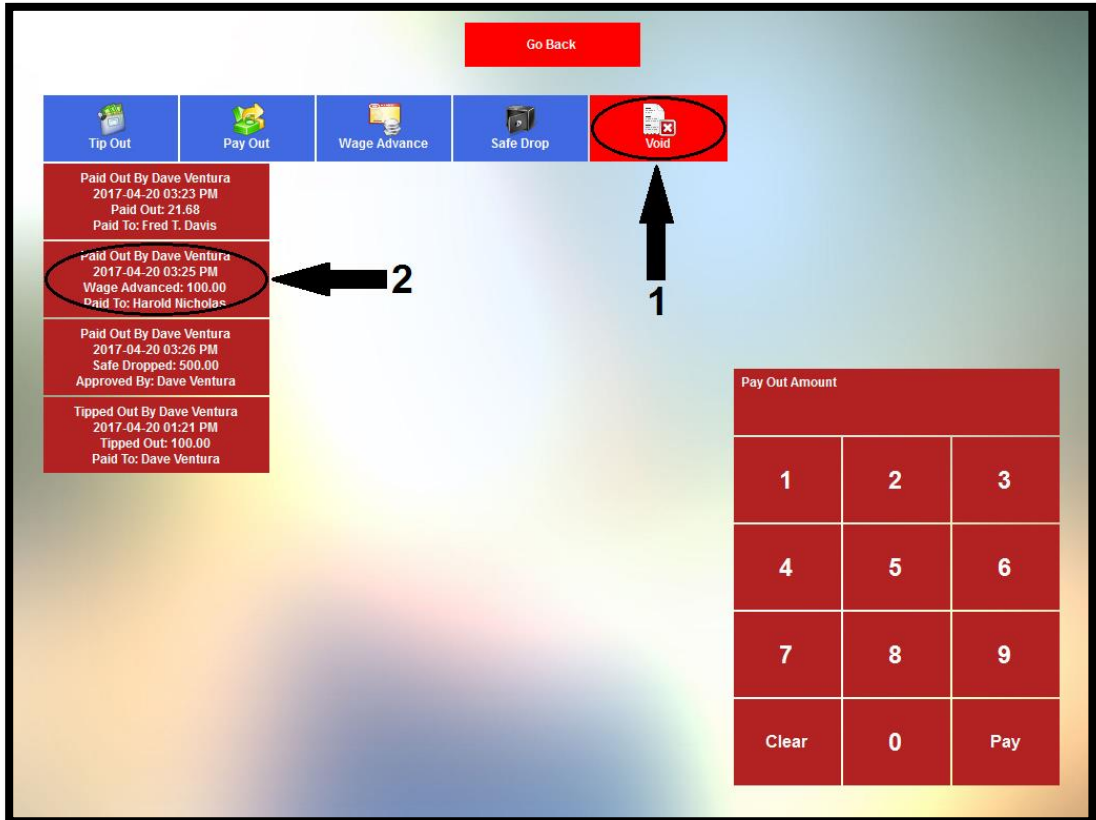


Figure 7-28

On the confirmation window that appears, click the “Yes ... Perform Void Now” button to complete the void of the Pay Out transaction (See Figure 7-29).

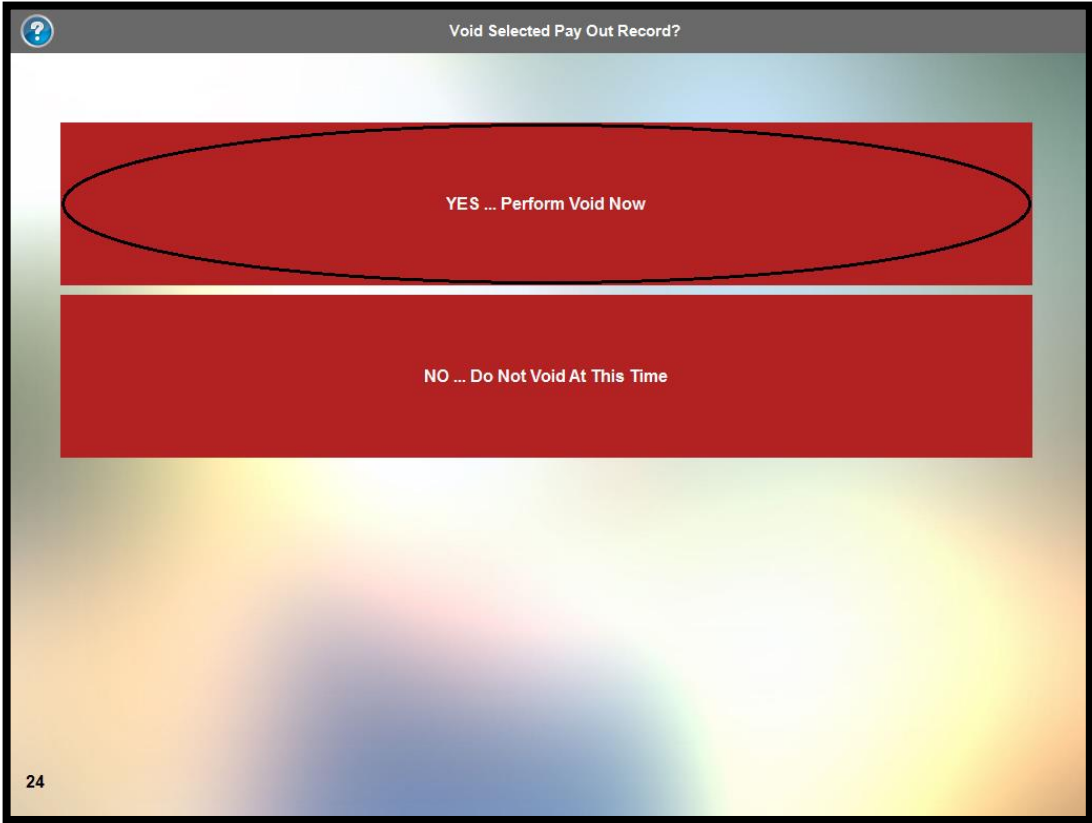
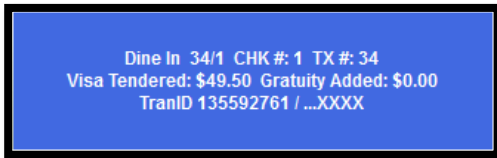


Figure 7-29

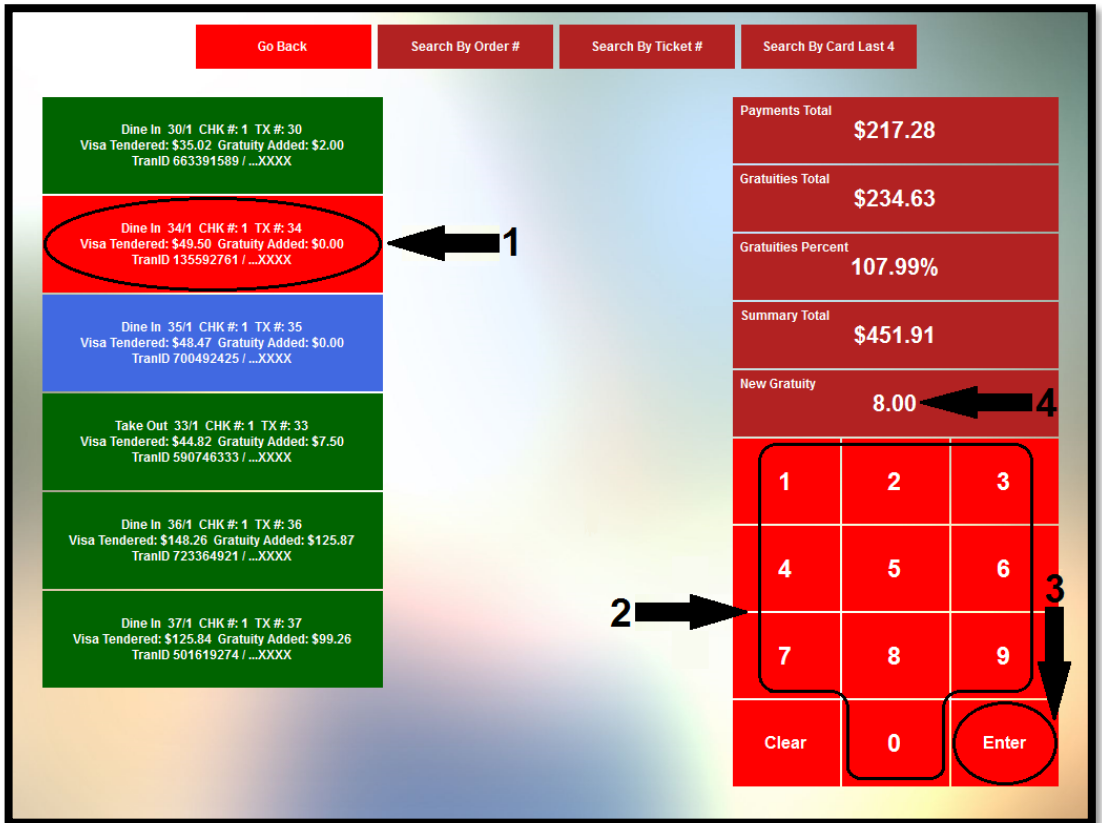
**Edit Gratuity**

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 displaying blue text on the button face indicates that no gratuity exists for the guest check [See Figure 7-30]).

**Figure 7-30**



Clicking a guest check button enables the virtual keypad. Enter the new gratuity amount through this keypad. As the new gratuity amount is entered, it displays on the screen in the New Gratuity field, directly above the keypad. Click the keypad's "Enter" button when finished (See Figure 7-31).



**Figure 7-31**

Upon clicking the “Enter” 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 7-32).

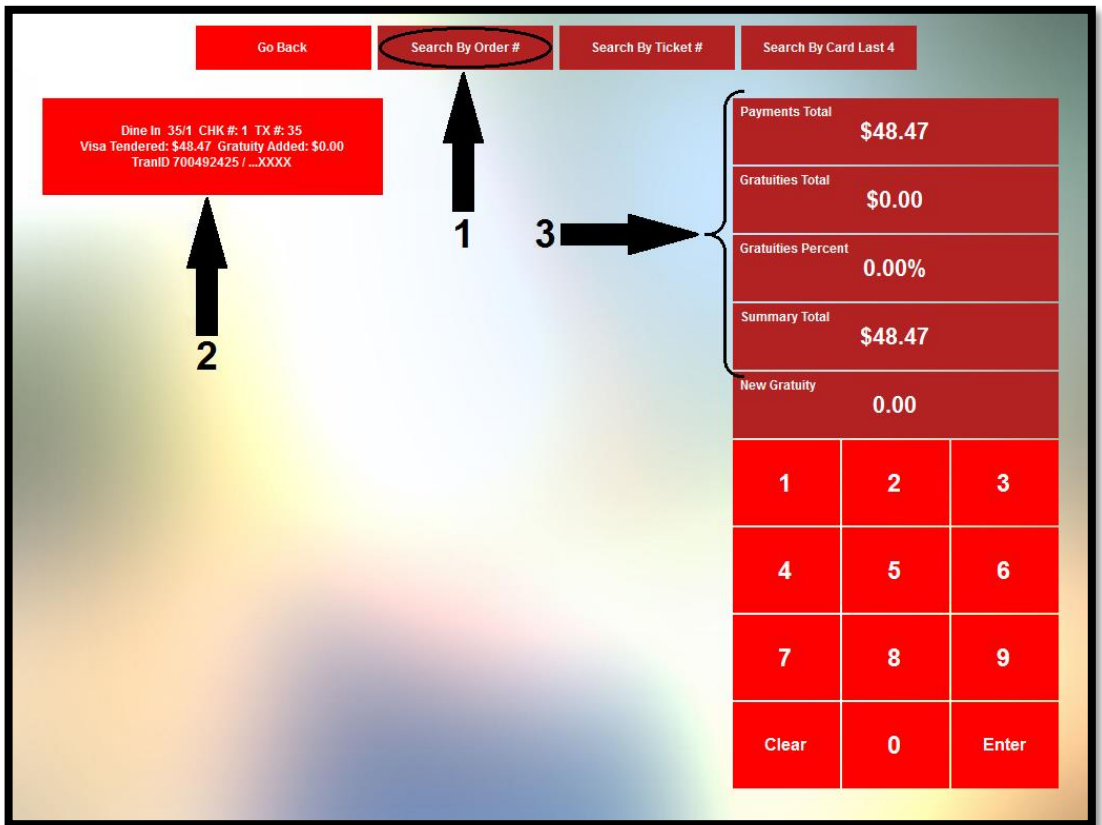
The screenshot displays the XERA POS interface. At the top, there are four buttons: "Go Back" (red), "Search By Order #" (dark red), "Search By Ticket #" (dark red), and "Search By Card Last 4" (dark red). Below these are six order cards. The first card is green and contains the text: "Dine In 30/1 CHK #: 1 TX #: 30", "Visa Tendered: \$35.02 Gratuity Added: \$2.00", and "TranID 663391589 / ...XXXX". A blue arrow points from the "Go Back" button to this first order card. The second card is green: "Dine In 34/1 Check #: 1 Ticket #: 34", "Visa Tendered: \$57.50 Gratuity Added: \$8.00", "TranID 135592761 / ...XXXX". A black arrow labeled "1" points from this card to the left. The third card is blue: "Dine In 35/1 CHK #: 1 TX #: 35", "Visa Tendered: \$48.47 Gratuity Added: \$0.00", "TranID 700492425 / ...XXXX". A black arrow labeled "2" points from this card to the right. The fourth card is green: "Take Out 33/1 CHK #: 1 TX #: 33", "Visa Tendered: \$44.82 Gratuity Added: \$7.50", "TranID 590746333 / ...XXXX". The fifth card is green: "Dine In 36/1 CHK #: 1 TX #: 36", "Visa Tendered: \$148.26 Gratuity Added: \$125.87", "TranID 723364921 / ...XXXX". The sixth card is green: "Dine In 37/1 CHK #: 1 TX #: 37", "Visa Tendered: \$125.84 Gratuity Added: \$99.26", "TranID 501619274 / ...XXXX". On the right side, there is a summary panel with a red background. It contains the following information: "Payments Total \$217.28", "Gratuities Total \$242.63", "Gratuities Percent 111.67%", and "Summary Total \$459.91". Below this is a "New Gratuity" section with a 3x3 grid of buttons: 1, 2, 3; 4, 5, 6; 7, 8, 9. The bottom row contains "Clear", "0", and "Enter".

**Figure 7-32**

When finished editing the gratuity, click the “Go Back” button to return to the previous screen.

**Search by Order #**

To find an order by the order number, click the “Search by Order #” 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 in the grid that shows the existing order information. A summary of the existing order information 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 7-33).



**Figure 7-33**

When finished editing the gratuity, click the “Go Back” button to return to the previous screen.

**Search by Ticket #**

To find an order by the ticket number, click the “Search by Ticket #” button to enable the virtual keypad in the lower-right portion of the screen. Enter the ticket number and then click the “Enter” button on the keypad. If the order is found, a button displays in the grid that shows the existing order

information. A summary of the existing order information also appears in the fields on the right side of the screen. Select the order button and edit the gratuity as described above.

When finished editing the gratuity, click the “Go Back” button to return to the previous screen.

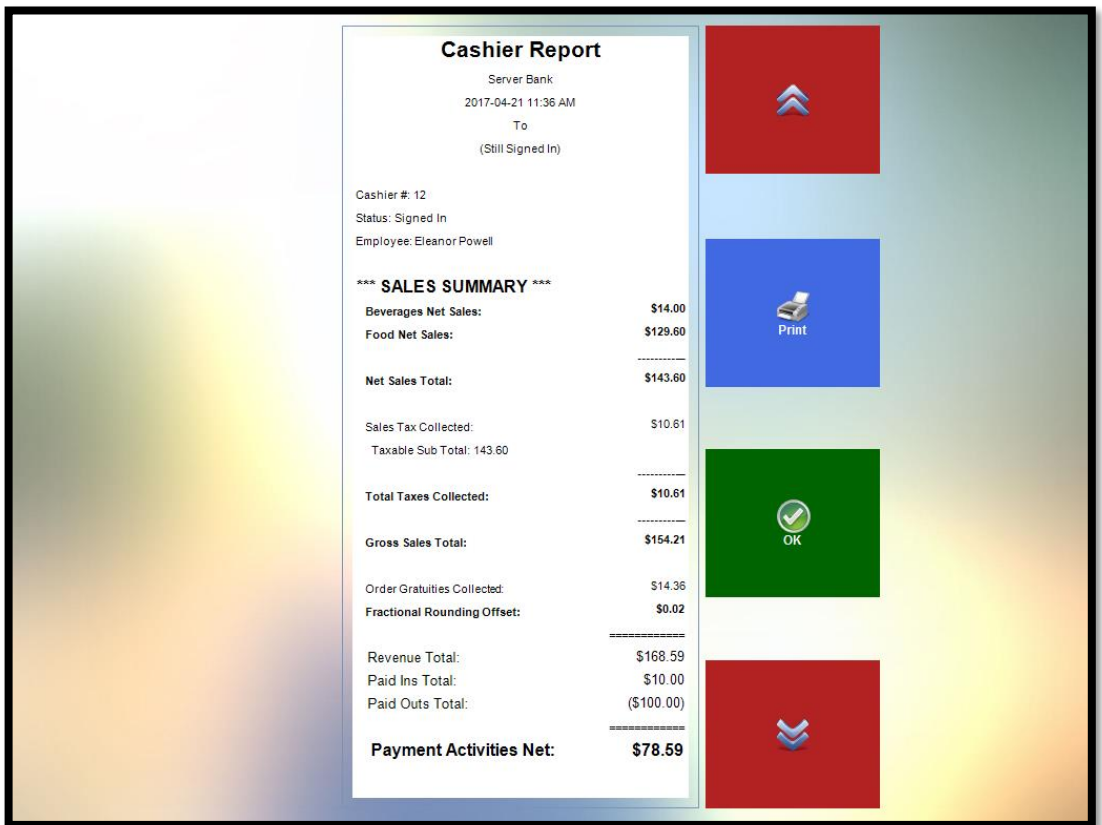
**Search by Card Last 4**

To find an order by the last four digits of the credit card that was used to settle it, click the “Search by Card Last 4” button to enable the virtual keypad in the lower-right portion of the screen. Enter the last four digits of the credit card account number and then click the “Enter” button on the keypad. If the order is found, a button displays in the grid that shows the existing order information. A summary of the existing order information 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 7-33).

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 7-34).

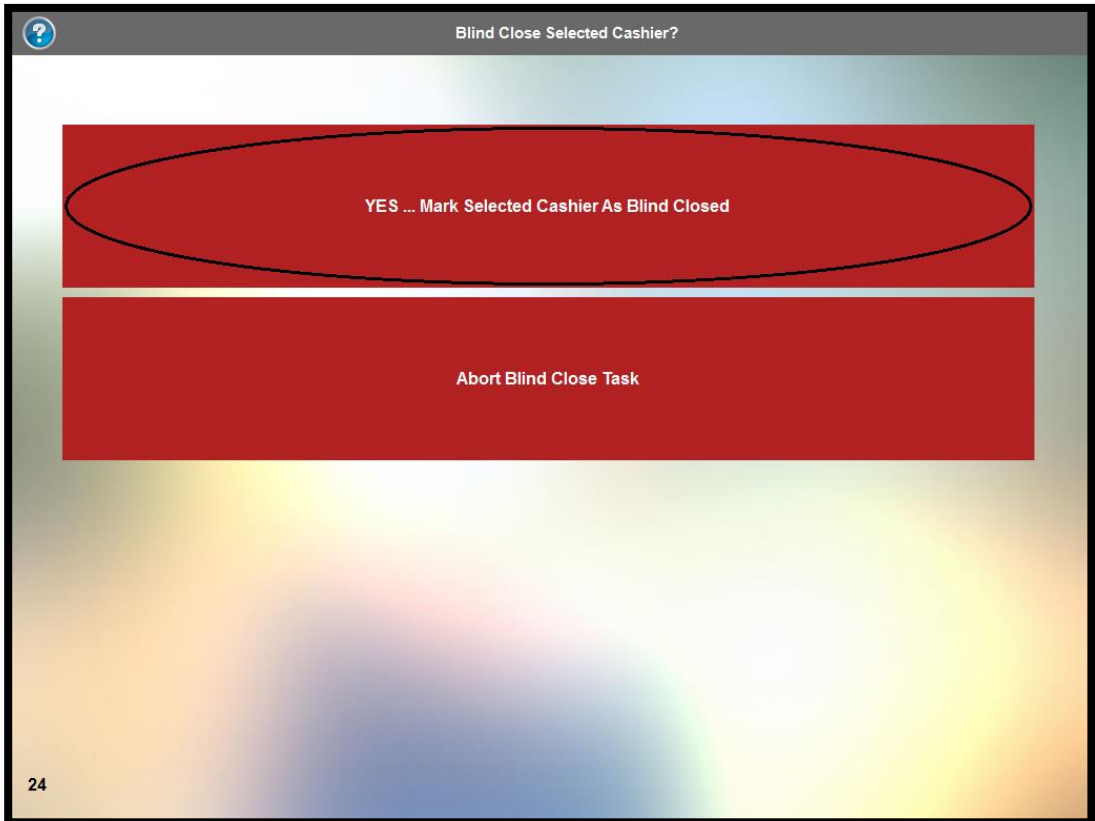


**Figure 7-34**

**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.

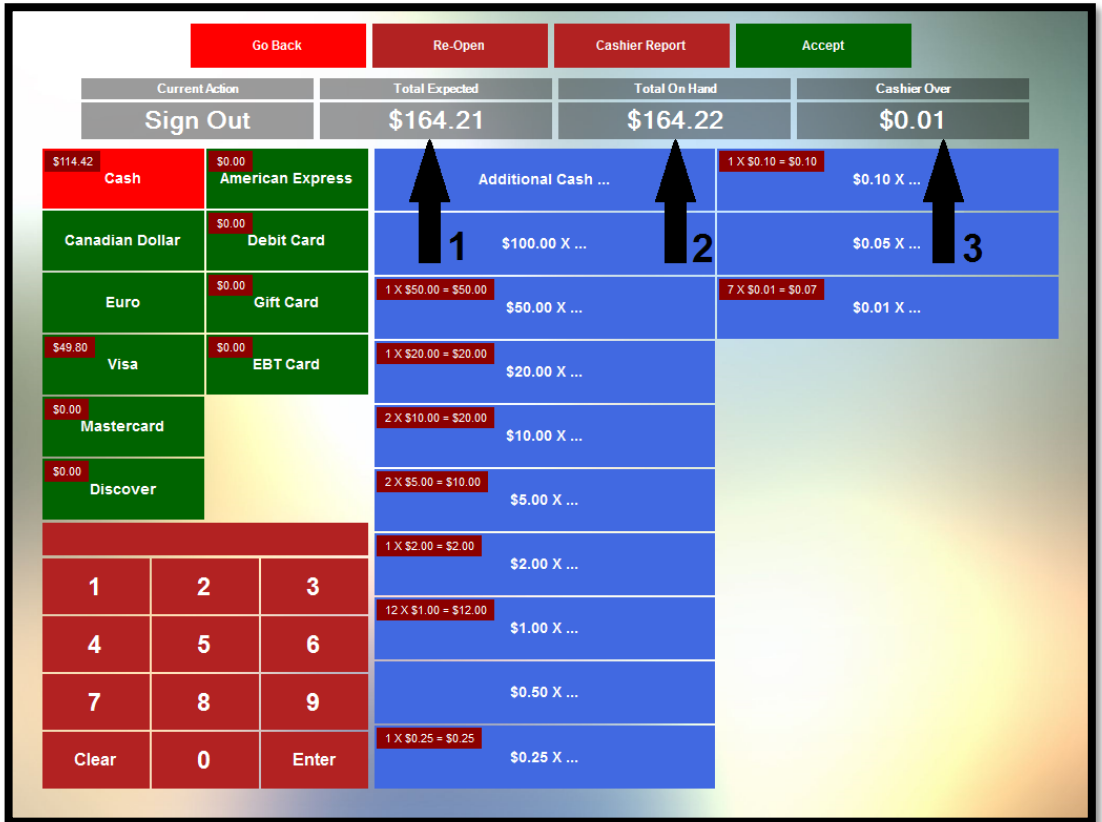
To perform a Blind Close, click the “Blind Close” button. The following screen asks the user to confirm that he indeed wishes to mark the selected server bank as blind closed. Click the “Yes... Mark Selected Cashier as Blind Closed” button to complete the Blind Close. To exit this screen without completing the Blind Close, click the “Abort Blind Close Task” button (See Figure 7-35).



**Figure 7-35**

**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 7-36).



**Figure 7-36**

**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 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 the tender type. These transactions are automatically applied to the count, thus increasing the Total On Hand figure. Do this for each tender type.

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.

**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 65 of this manual.

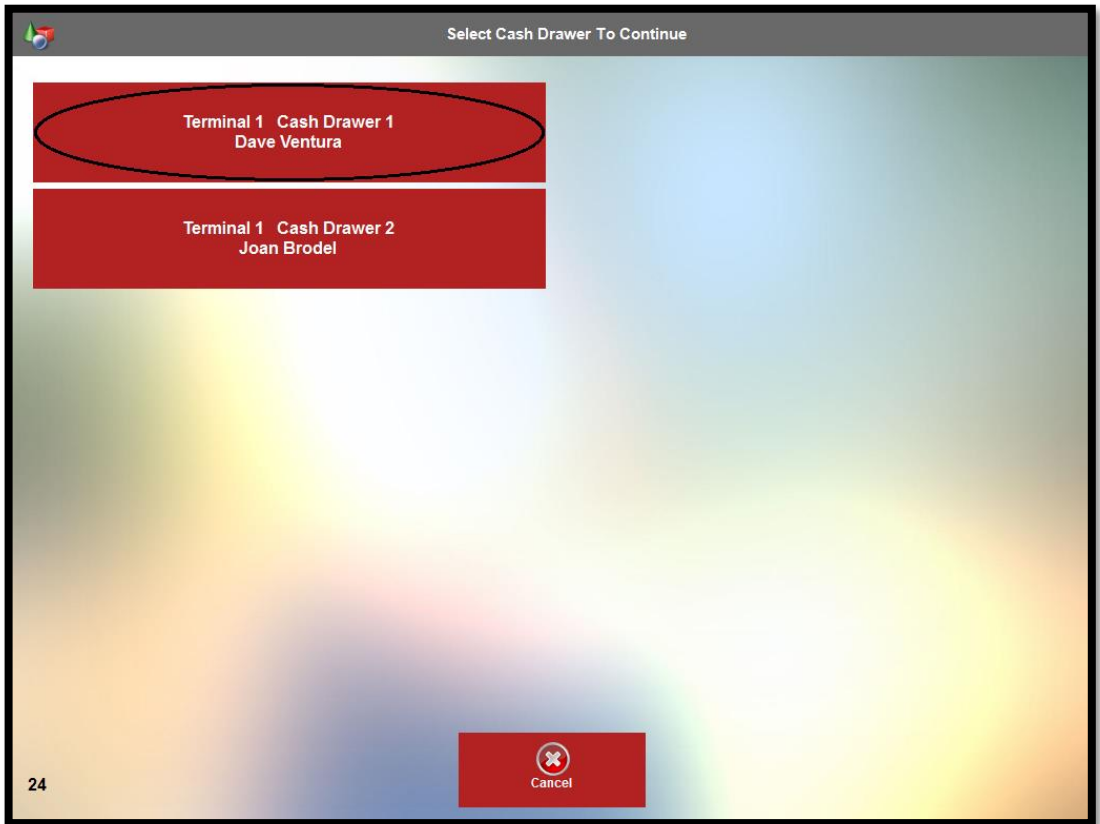
**Accept**

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 7-37).



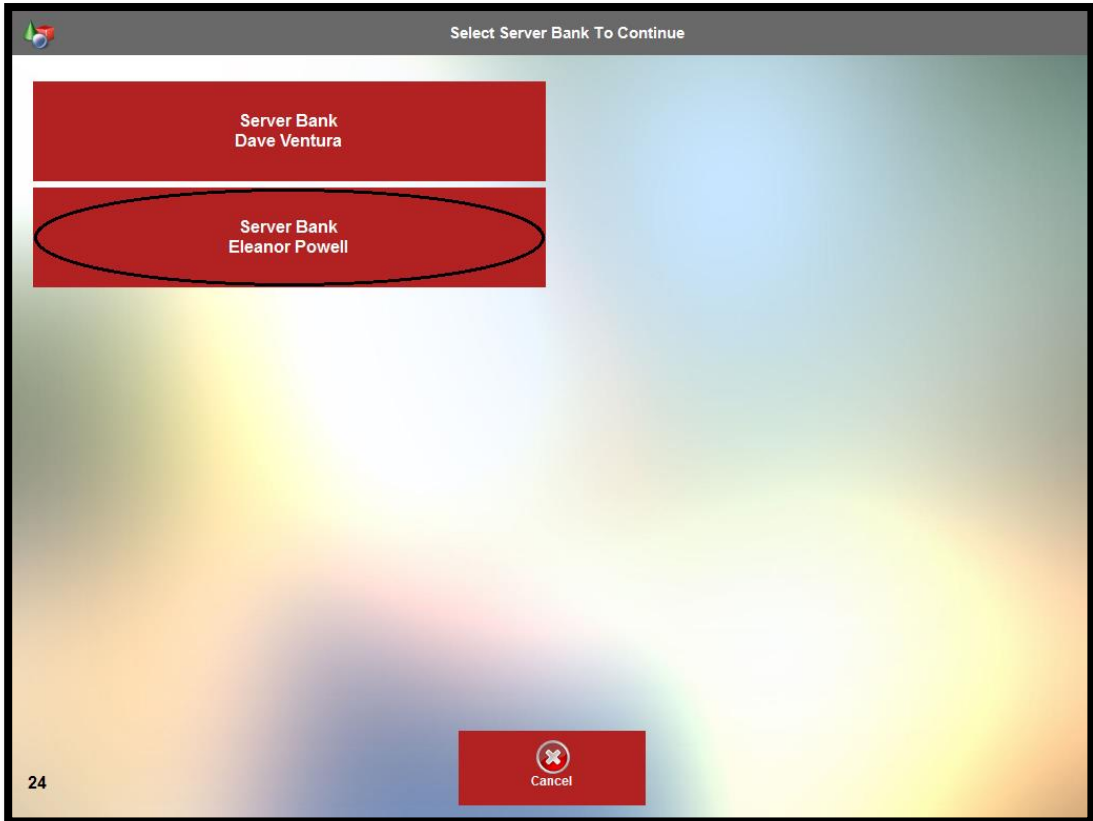
**Figure 7-37**

## 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 65 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 7-38).



**Figure 7-38**

## 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 71 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 74 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 82 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 65 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 87 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 89 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 closed. A button with a blue background indicates that the server bank or cashier was blind closed. Select the one you wish to reconcile by clicking on its respective button (See Figure 7-39).



**Figure 7-39**

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 67 or 89 of this manual, respectively.

## 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 or Sign Out Date screen. Select the desired month, day of the month, and year by using the appropriate up and down arrow buttons. To go directly to the current date, click the “Today” button at the bottom of the screen. Once the desired date is selected, click the “OK” button to return to the previous screen. (See Figure 7-40).

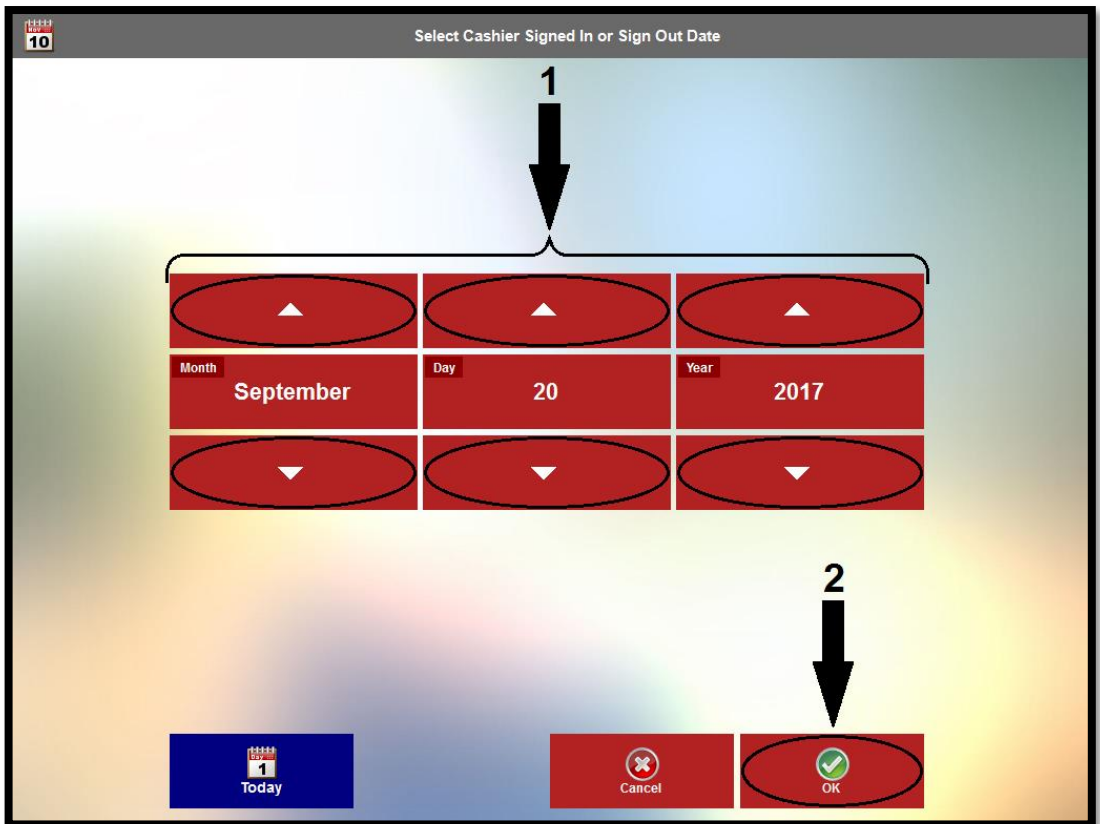


Figure 7-40

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 procedure for a selected date. Performing the end of day procedure 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 procedure. Once the end of day procedure 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 7-41).



Figure 7-41

**Review End of Day**

To generate and view 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 and down arrow buttons. To go directly to the current date, click the “Today” button at the bottom of the screen. Once the desired date is selected, click the “OK” button at the bottom of the screen (See Figure 7-42).

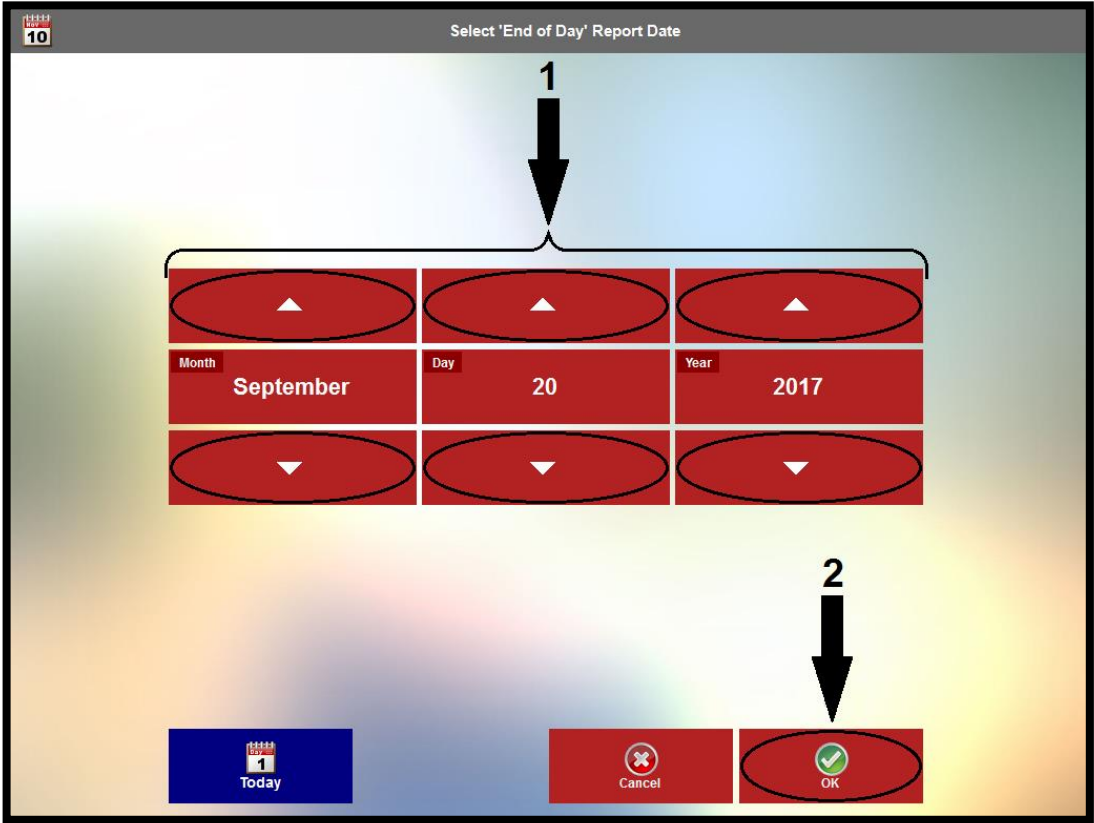


Figure 7-42

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 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 7-43).

**End of Day Report**  
Business Date: 2017-04-21  
(EOD Summarizes Settled Orders Only)

**\*\*\* PREVIEW \*\*\***

**\*\*\* SALES SUMMARY \*\*\***

|                                    |                  |
|------------------------------------|------------------|
| Beverages Net Sales:               | \$14.00          |
| Food Net Sales:                    | \$129.60         |
| <b>Net Sales Total:</b>            | <b>\$143.60</b>  |
| Sales Tax Collected:               | \$10.61          |
| Taxable Sub Total: \$143.60        |                  |
| <b>Total Taxes Collected:</b>      | <b>\$10.61</b>   |
| <b>Gross Sales Total:</b>          | <b>\$154.21</b>  |
| Order Gratuities Collected:        | \$14.36          |
| <b>Total Gratuities Collected:</b> | <b>\$14.36</b>   |
| <b>Revenue Total:</b>              | <b>\$168.57</b>  |
| Paid Ins Total:                    | \$10.00          |
| Paid Outs Total:                   | (\$100.00)       |
| Tip Outs Total:                    | (\$157.01)       |
| <b>Activities Net:</b>             | <b>(\$78.44)</b> |

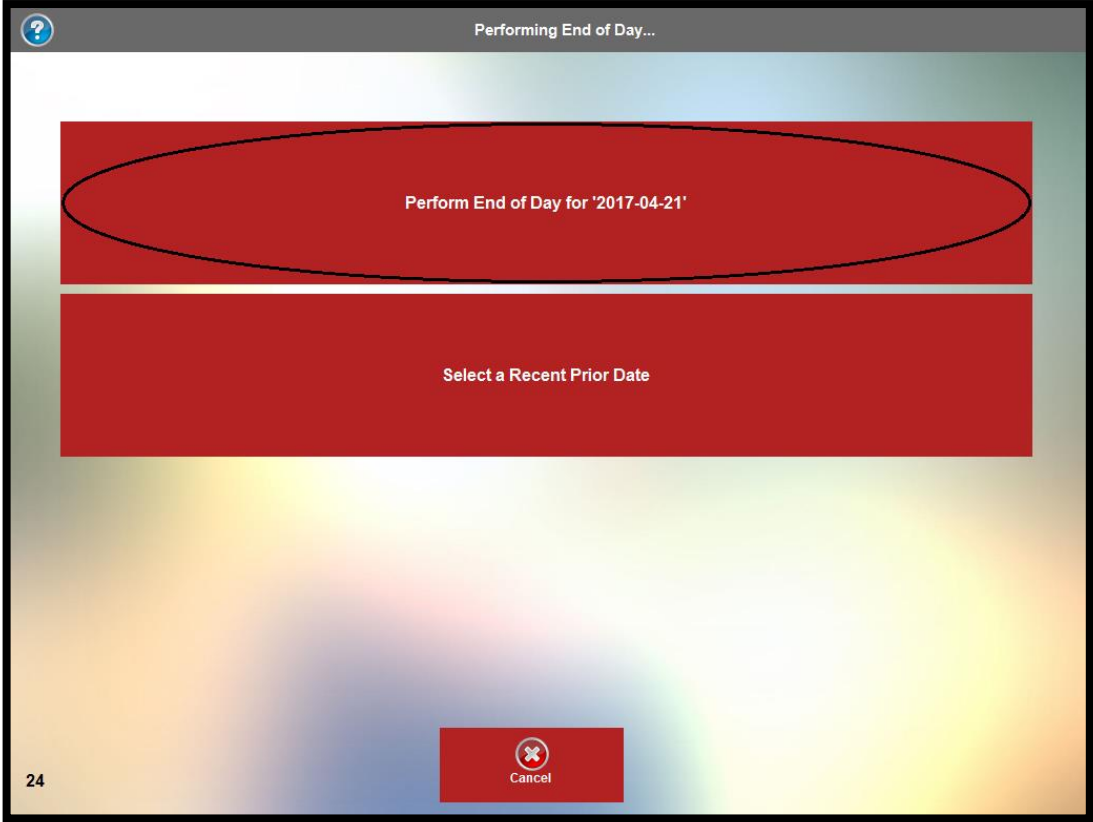
**\*\*\* CASHIERS SUMMARY \*\*\***

**Figure 7-43**



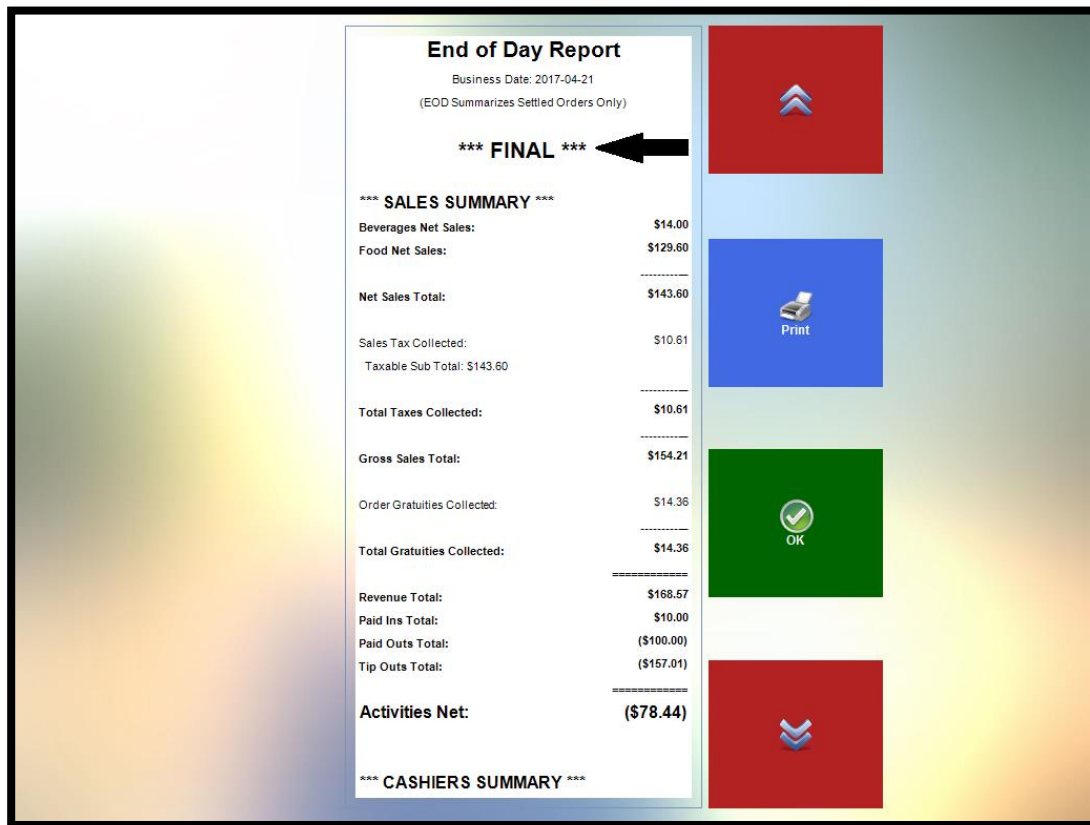
**Perform End of Day**

To perform the end of day procedure, click the “Perform End of Day” button. This action displays the Performing End of Day confirmation window. To continue, click the “Perform End of Day for xxxx-xx-xx” button, where xxxx-xx-xx is the desired date (See Figure 7-44).



**Figure 7-44**

When the end of day close process is complete, the final End of Day Report displays. If the length of the report exceeds the limits of the screen, use the up 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 7-45).



**Figure 7-45**

## 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, its 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 1 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. Finally, open XERA® POS and refresh your settings.

Now when you create a new order of this type in XERA® POS, upon selecting the 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 7-46).

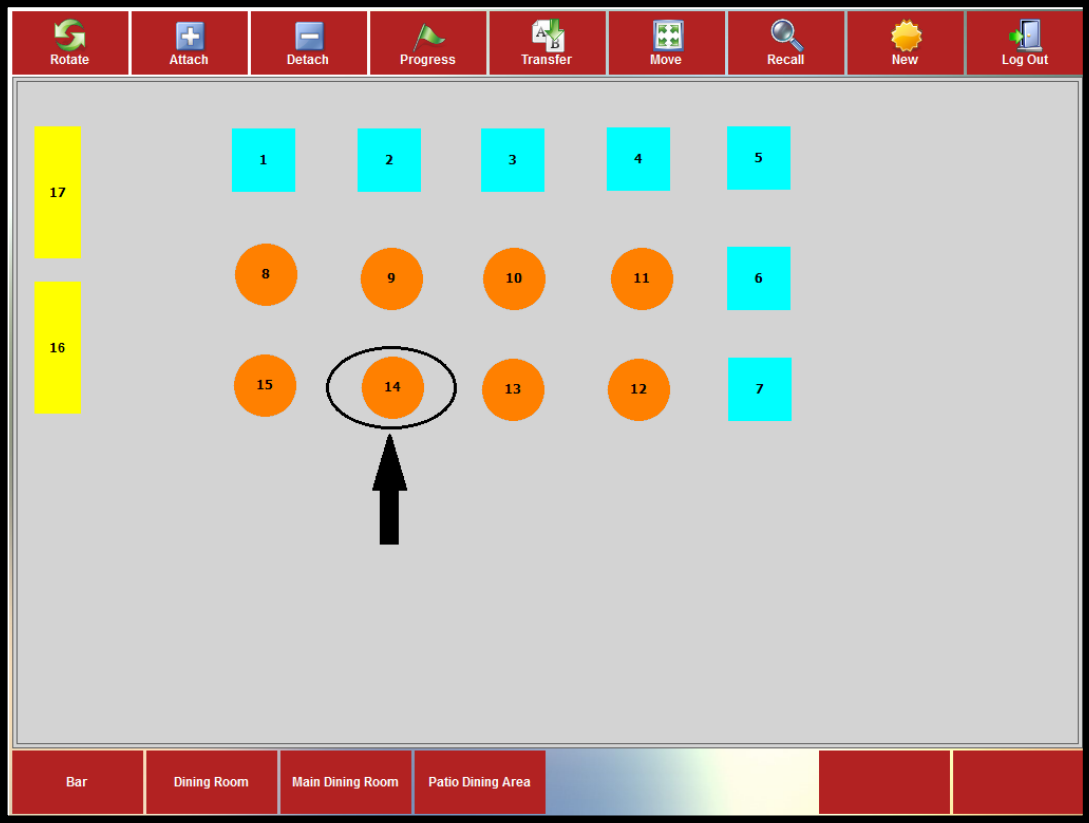


Figure 7-46

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 7-47).

| Type                   | Guests | Table #14 |            |                |
|------------------------|--------|-----------|------------|----------------|
| Dine In - New/1 (Dave) |        | Check 1   |            |                |
| Stuffed Jalapeños      |        | \$4.95    | Modify     | Prep           |
| New York Steak         |        | \$16.95   |            |                |
| Medium Well            |        |           | Note       | Clear Note     |
| Mashed Potatoes        |        |           |            |                |
| Steamed Vegetables     |        |           | Repeat     | Void           |
| Roasted Chicken        |        | \$12.95   |            |                |
| Rice Pilaf             |        |           | Hold       | Clear Hold     |
| Steamed Vegetables     |        |           |            |                |
| Budweiser              |        | \$3.95    | Discount   | Clear Discount |
| Bloody Mary            |        | \$4.95    |            |                |
|                        |        |           | Share      | Price          |
|                        |        |           |            |                |
|                        |        |           | Remake     | No Make        |
|                        |        |           |            |                |
|                        |        |           | Clear Seat | Clear Course   |
|                        |        |           |            |                |
|                        |        |           | Add Qty    | Recipe         |
|                        |        |           |            |                |
|                        |        |           | Like Items | Menu Groups    |
|                        |        |           |            |                |
|                        |        |           | Settle     | Recall         |

|             |                 |         |  |
|-------------|-----------------|---------|--|
| TABLE #: 14 |                 |         |  |
|             |                 |         |  |
| Sub Total   | Tax             | Total   |  |
| \$43.75     | \$3.23          | \$46.98 |  |
| Add Check   | Split / Combine |         |  |
| 1           |                 |         |  |

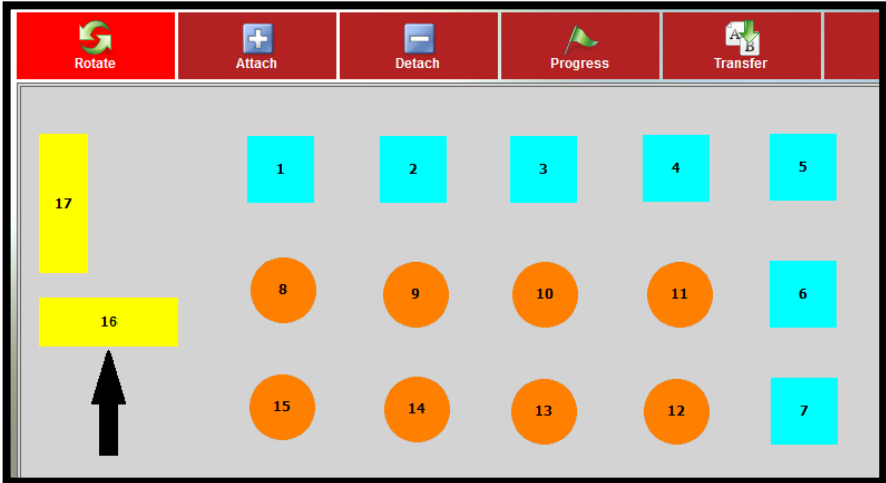
Figure 7-47

**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 table click rotates the table image 90° (See Figure 7-48).



Before Table Rotation



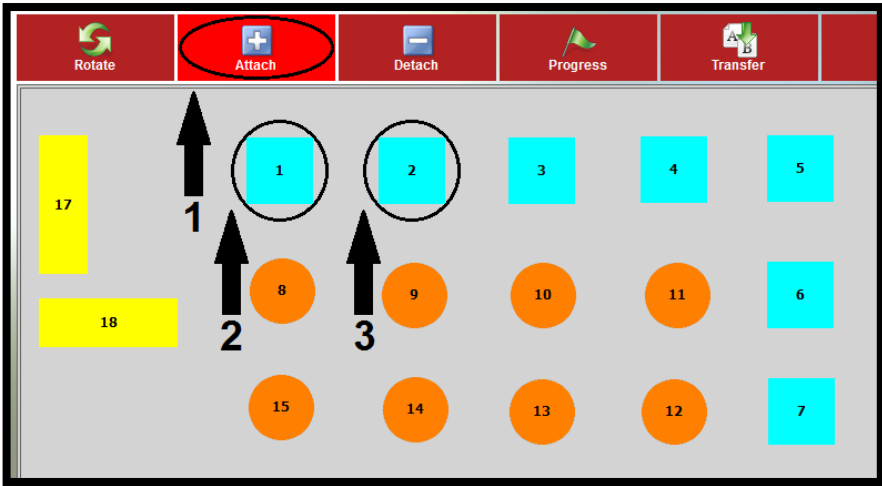
After Table Rotation

**Figure 7-48**

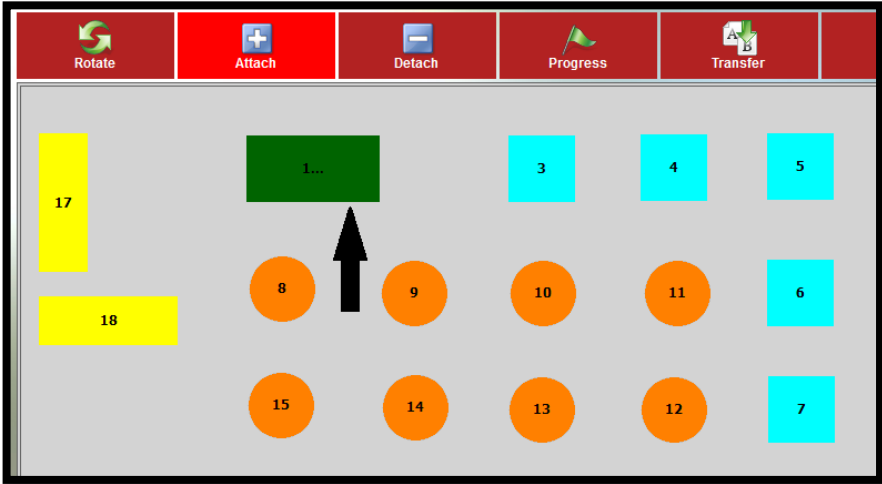
Please note that the **Rotate** feature has no visible effect on round or square tables in your visual floor plan diagram as the horizontal and vertical dimensions are identical.

**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 7-49).



Before Table Attachment



After Table Attachment

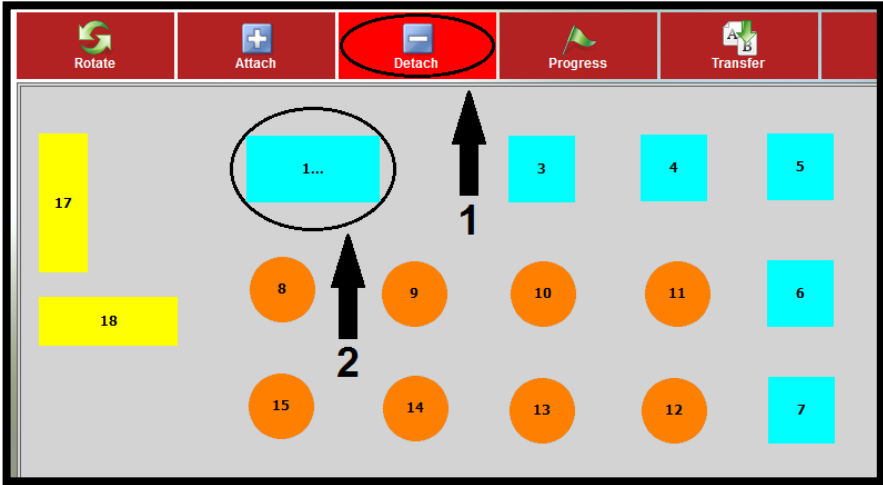
**Figure 7-49**

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, oval tables, and round tables may all be attached to each other.

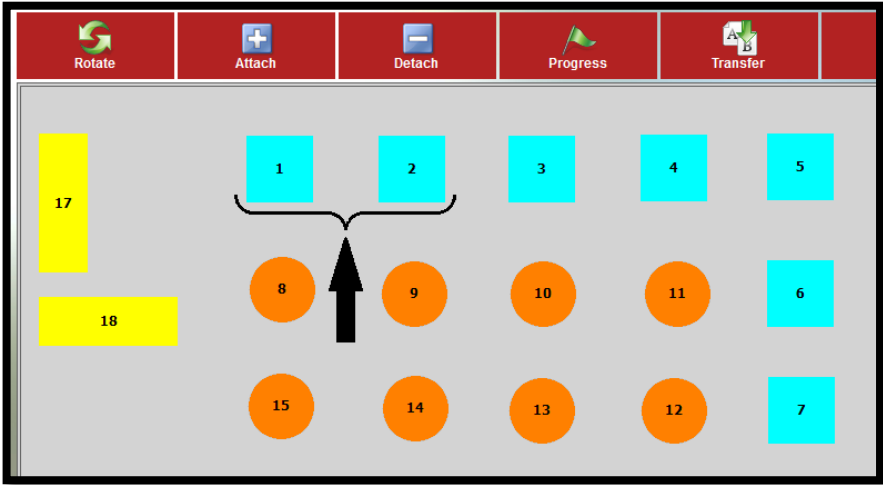


**Detach**

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 7-50).



Before Table Detachment



After Table Detachment

**Figure 7-50**

## 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 the appropriate button (See Figure 7-51).

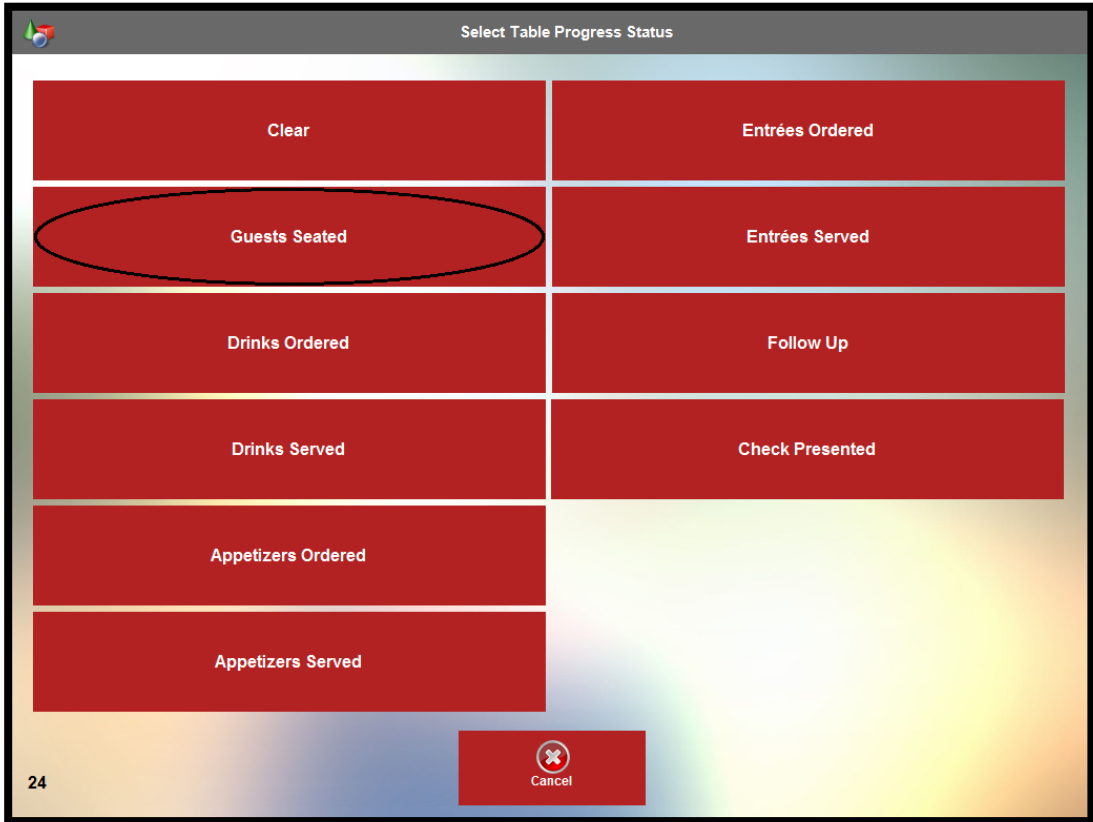
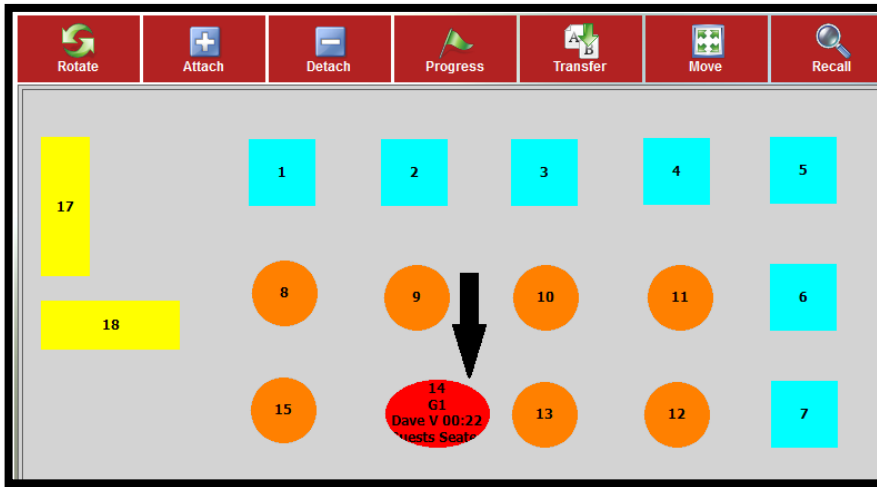


Figure 7-51

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 (if any), indicating that the guest party's next seating status update is overdue (See Figure 7-52).

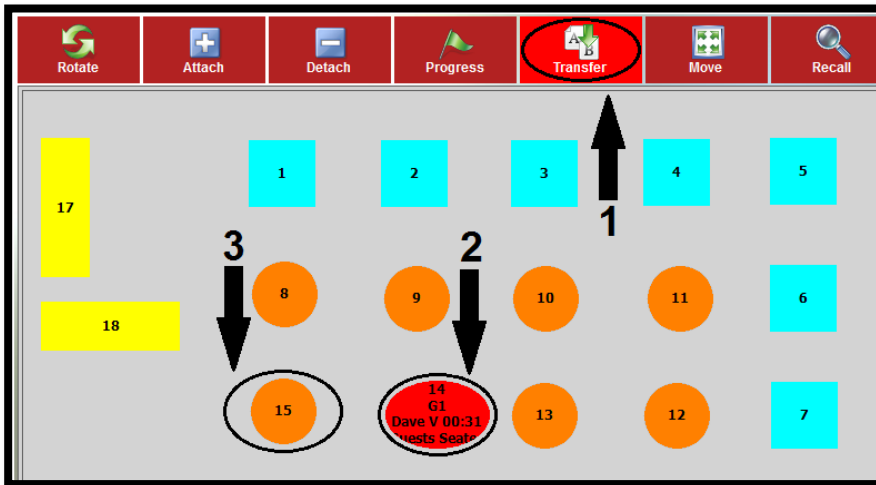


**Figure 7-52**

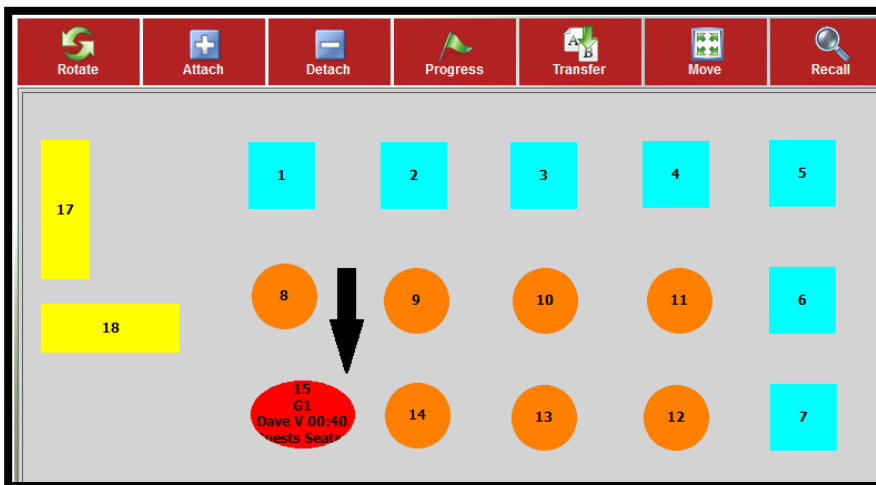
Seating statuses and trigger alert minutes are user defined. Seating statuses may be created and trigger alert minutes may be set in the XERA® POS Manager application by navigating to **Seating Tab > Floor Plans > Seating Statuses**, and then selecting the “New” button.

## 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 7-53).



Before Transfer

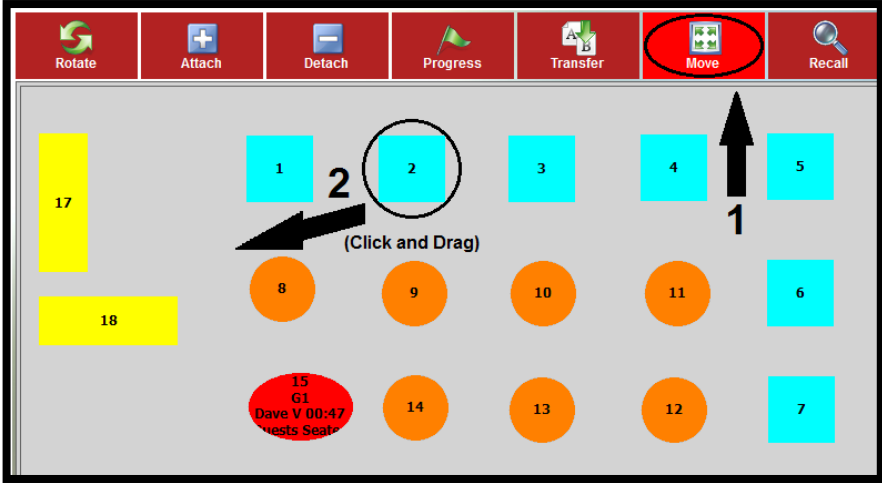


After Transfer

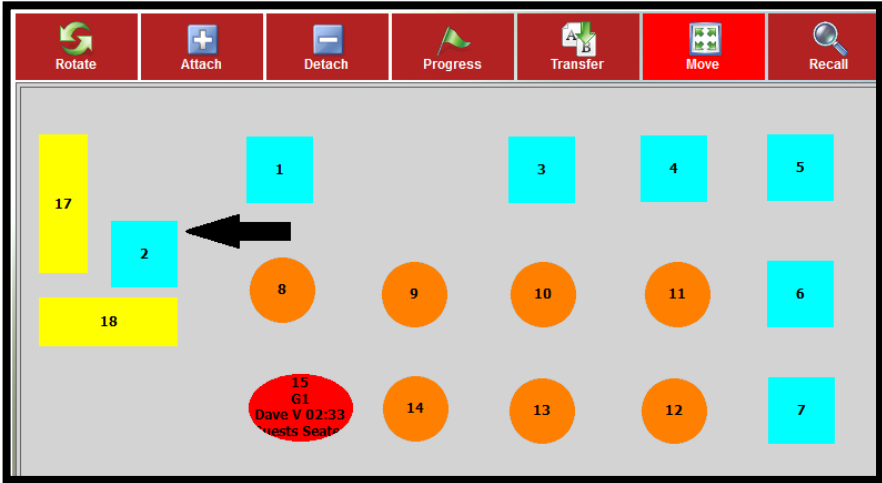
Figure 7-53

**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 7-54).



Before Move



After Move

**Figure 7-54**

**Recall**

The **Recall** feature of the visual floor plan allows the user to return a previous order to the screen. To recall an order, click the “Recall” button and then follow the steps listed in the Chapter titled **Recall** on page 17 of this manual.

**New**

The **New** feature of the visual floor plan allows the user to enter a new order into the system. To create a new order, click the “New” button and then follow the steps listed in the section titled **New Order** on page 18 of this manual.

**Log Out**

When you finish working with the Hostess screen, click the “Log Out” button to return to the login screen of XERA® POS where you may log out if desired.

# Time Card

The **Time Card** feature of XERA® POS allows the employee to clock in and out for his work shifts, work breaks, and lunch periods. Click the “Misc” button at the bottom of the screen and then click the “Time Card” button to access the feature. The Clock In screen displays. This screen shows the employee’s name and the current system date and time (See Figure 7-55).

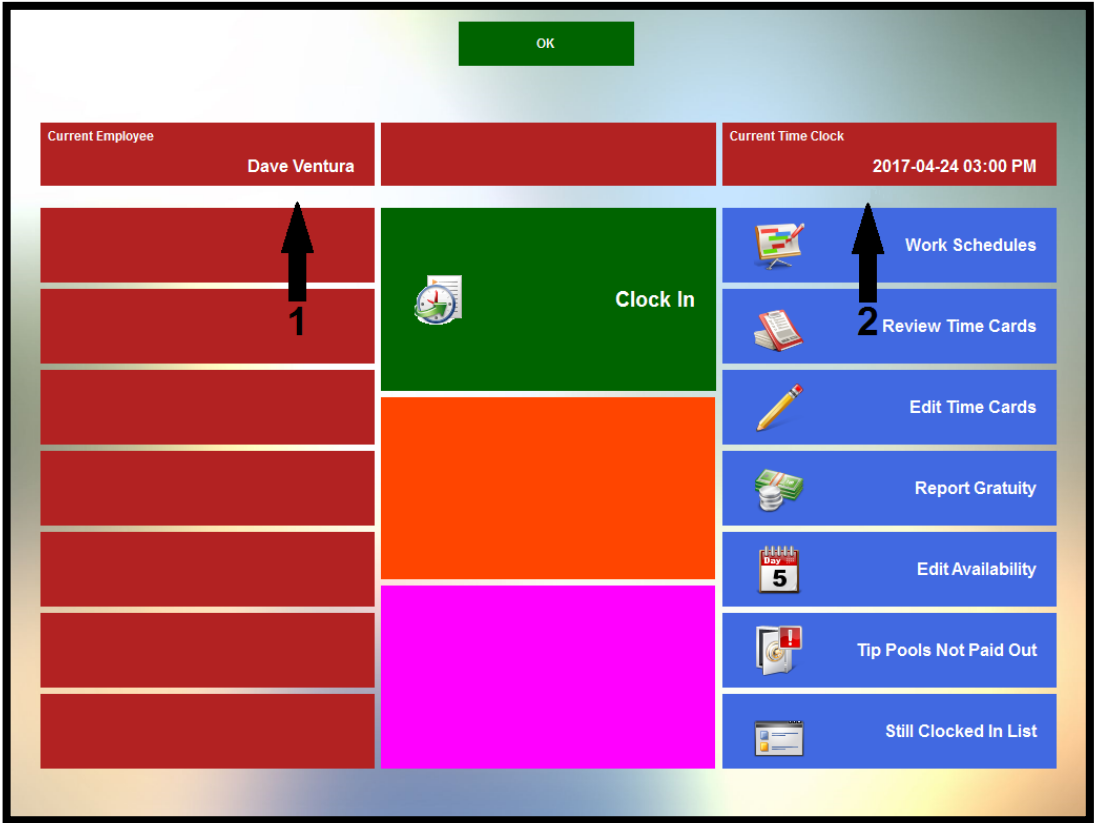
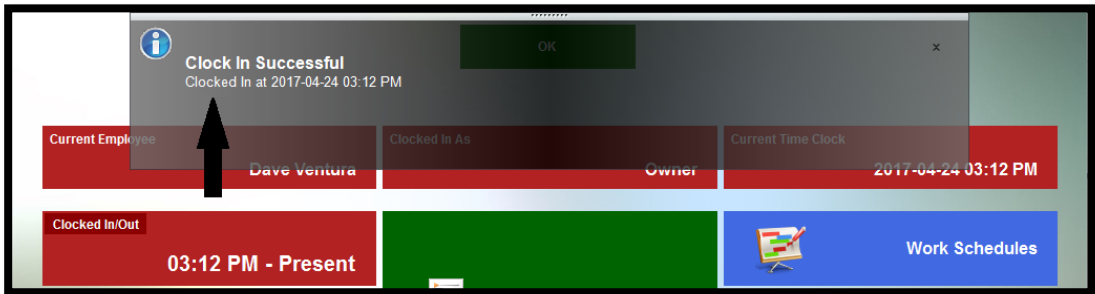


Figure 7-55

## Clock In

When an employee is ready to begin his work shift, he clicks the “Clock In” button. The Clock In Successful message displays (See Figure 7-56).



**Figure 7-56**



When the message is dismissed, the underlying screen displays the employee's work shift clock in time and the job title under which the employee is now clocked in (See Figure 7-57).

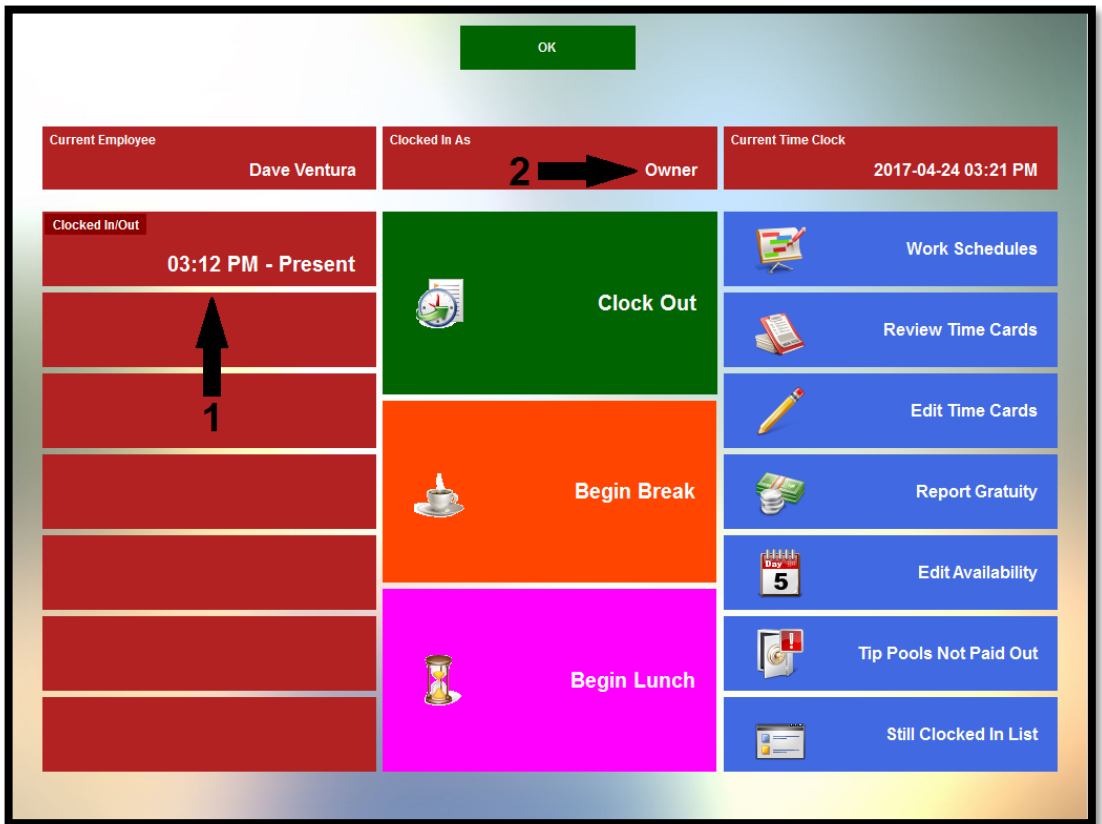


Figure 7-57

## Begin Break

When the employee is ready to take a scheduled work break, he clicks the “Begin Break” button. The Begin Break Successful message displays (See Figure 7-58).

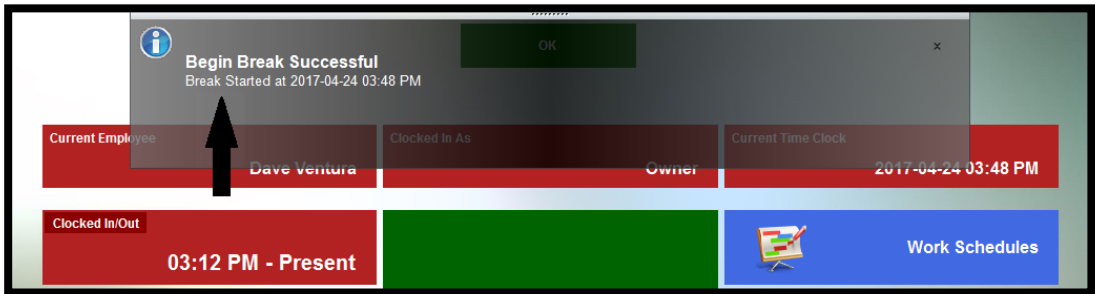
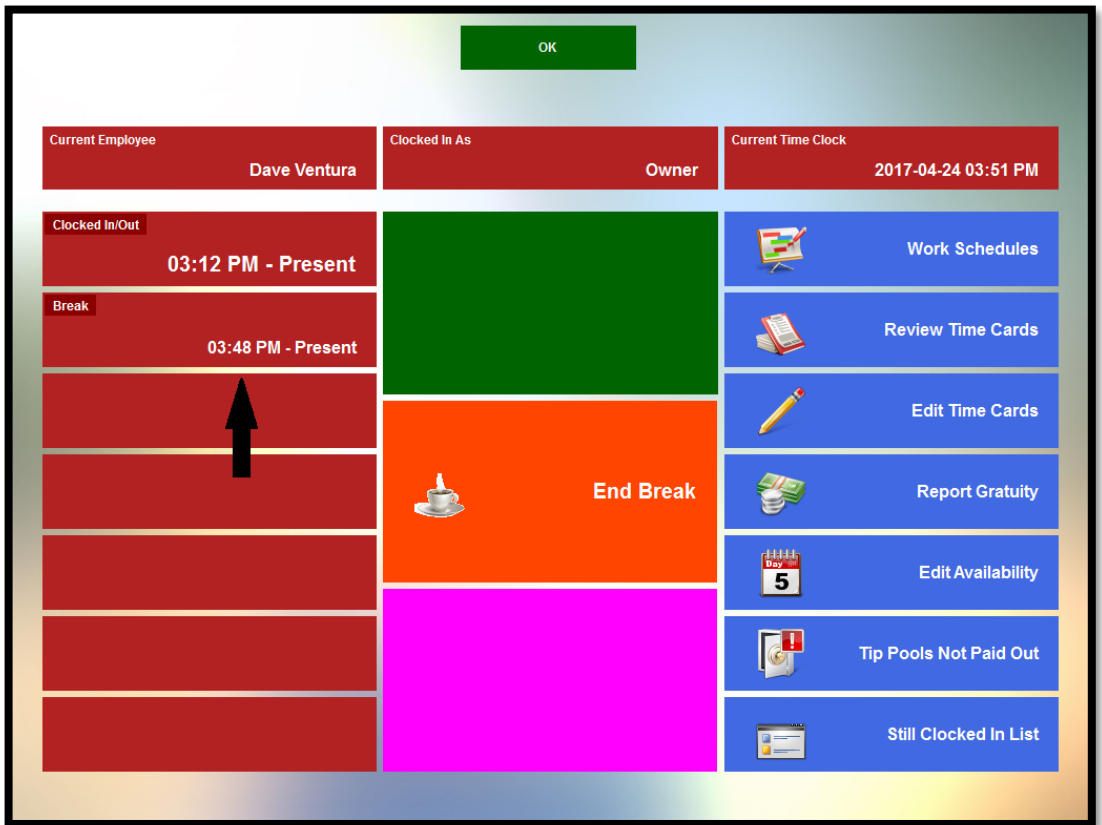


Figure 7-58

When the message is dismissed, the underlying screen displays the employee's begin break clock out time (See Figure 7-59).



**Figure 7-59**

Please note that the employee may be entitled to take one or more scheduled work breaks during his work shift. The procedure for clocking in and out is identical for each. XERA® POS supports up to five work break periods per work shift.

## End Break

When the employee is ready to return from his scheduled work break, he clicks the “End Break” button. The End Break Successful message displays (See Figure 7-60).

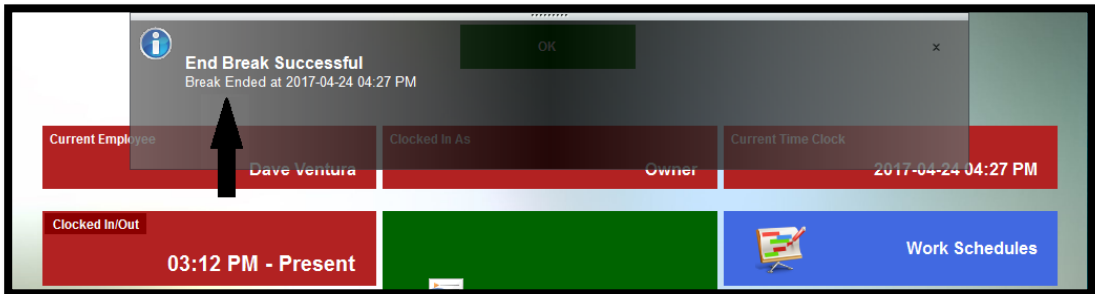


Figure 7-60

When the message is dismissed, the underlying screen displays the employee’s entire break period, including the begin break clock out time and the end break clock in time (See Figure 7-61).

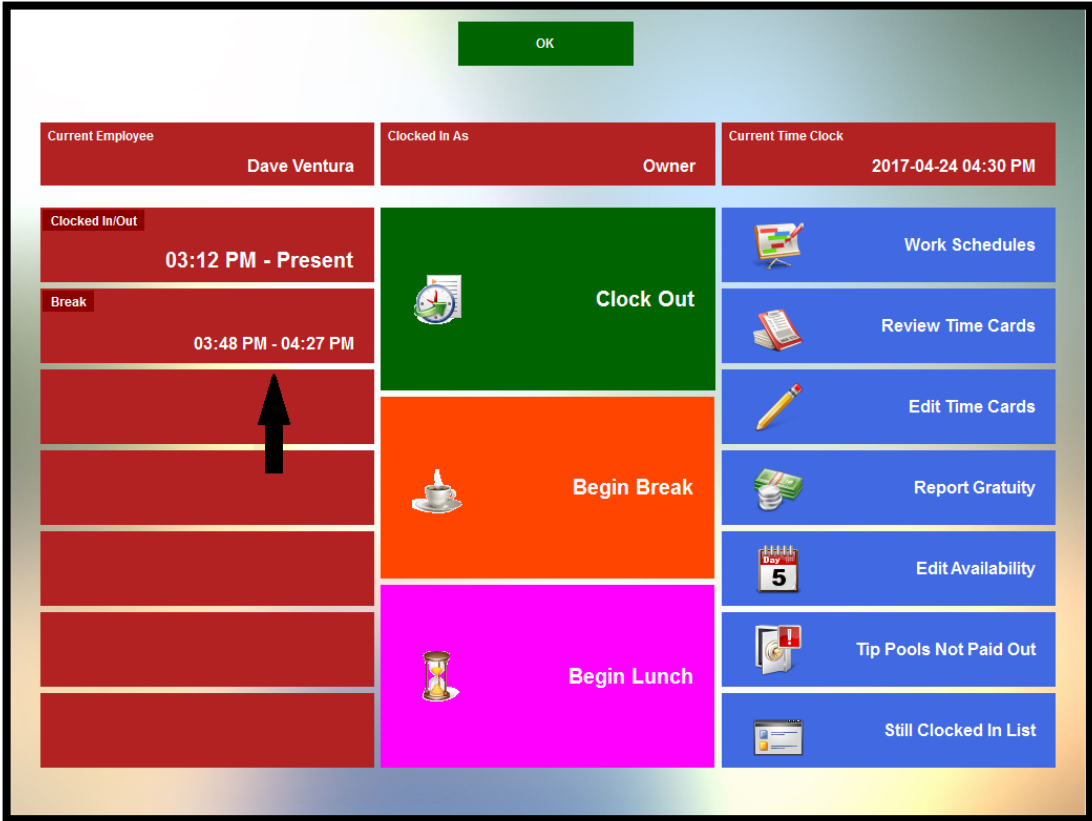


Figure 7-61

## Begin Lunch

When the employee is ready to take a scheduled lunch break, he clicks the “Begin Lunch” button. The Begin Lunch Successful message displays (See Figure 7-62).

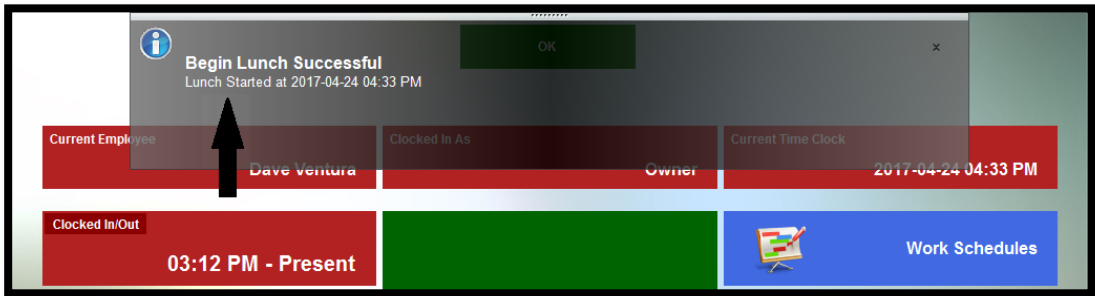


Figure 7-62

When the message is dismissed, the underlying screen displays the employee’s begin lunch clock out time (See Figure 7-63).

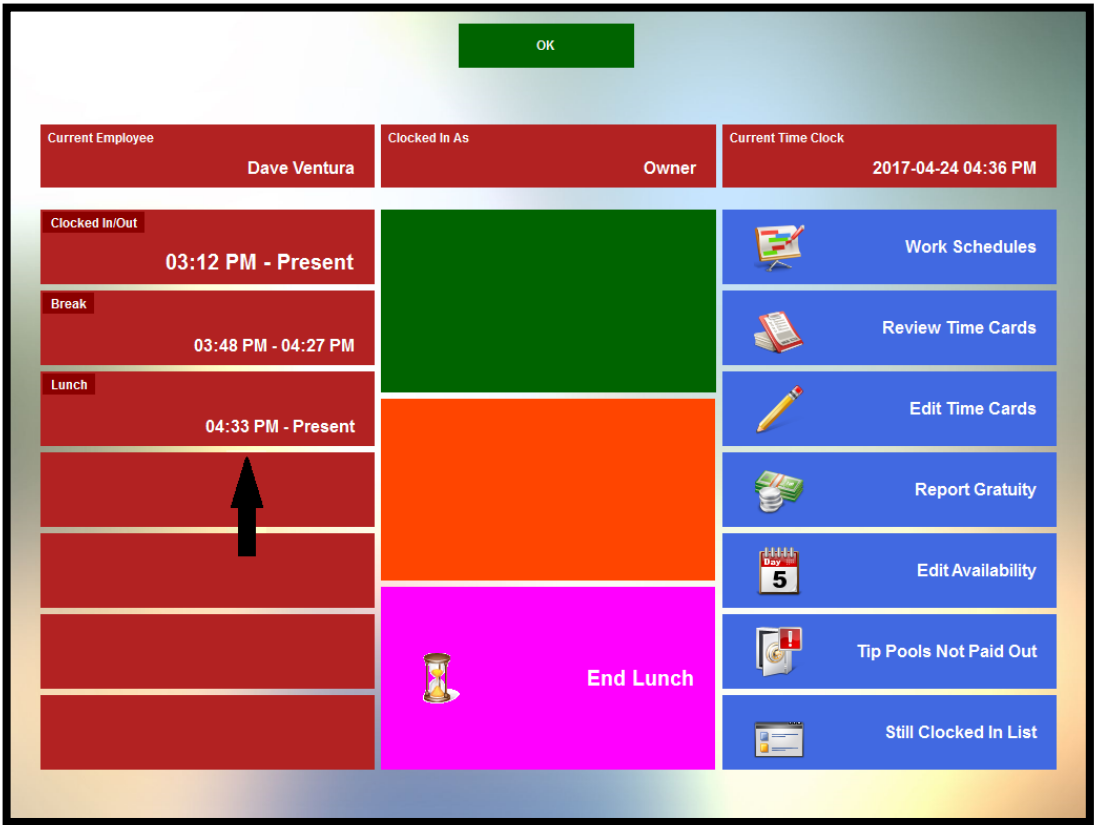
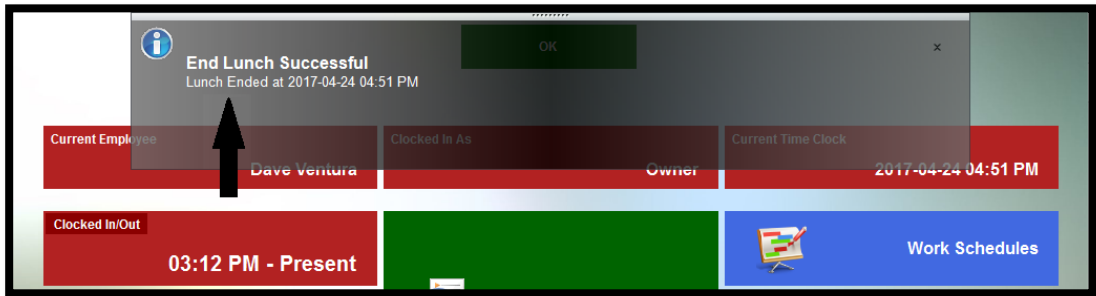


Figure 7-63

## End Lunch

When the employee is ready to return from his scheduled lunch break, he clicks the “End Lunch” button. The End Lunch Successful message displays (See Figure 7-64).



**Figure 7-64**



When the message is dismissed, the underlying screen displays the employee’s entire lunch period, including the begin lunch clock out time and the end lunch clock in time (See Figure 7-65).

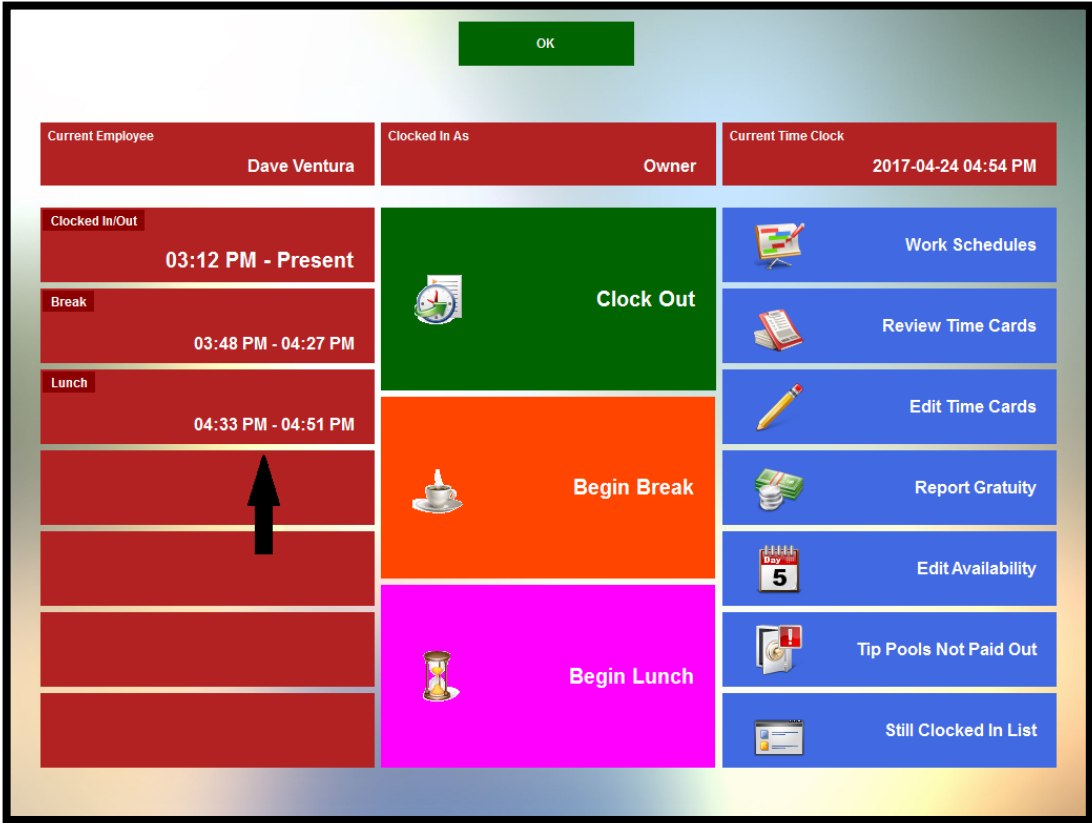


Figure 7-65

## Work Schedules

Clicking the “Work Schedules” button displays a screen where the user may select an employee from the buttons on the left side of the screen and then view the employee’s work schedule. If the display of the schedule exceeds the limits of the screen, use the arrow buttons to scroll the schedule up or down to reveal the hidden portions. To print a copy of the schedule, click the “Print” button. The schedule prints to the terminal’s default receipt printer. When finished viewing the schedule, click the “OK” button to return to the previous screen (See Figure 7-66).

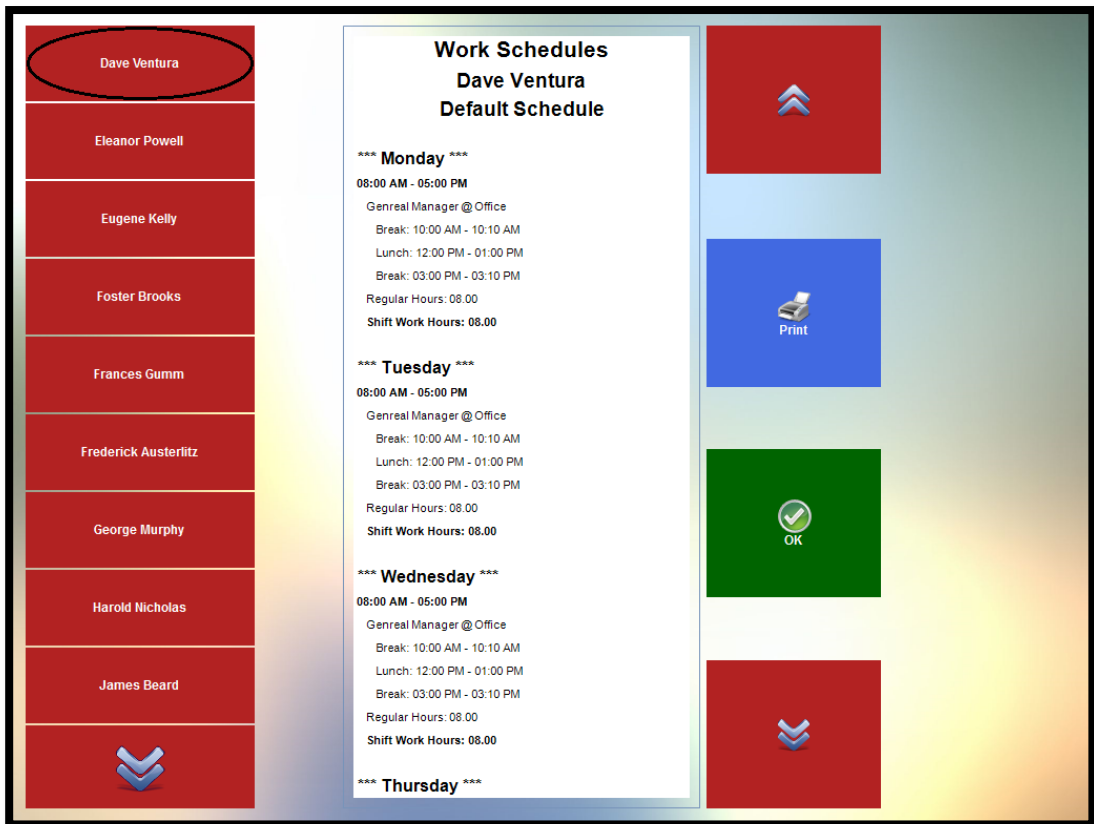
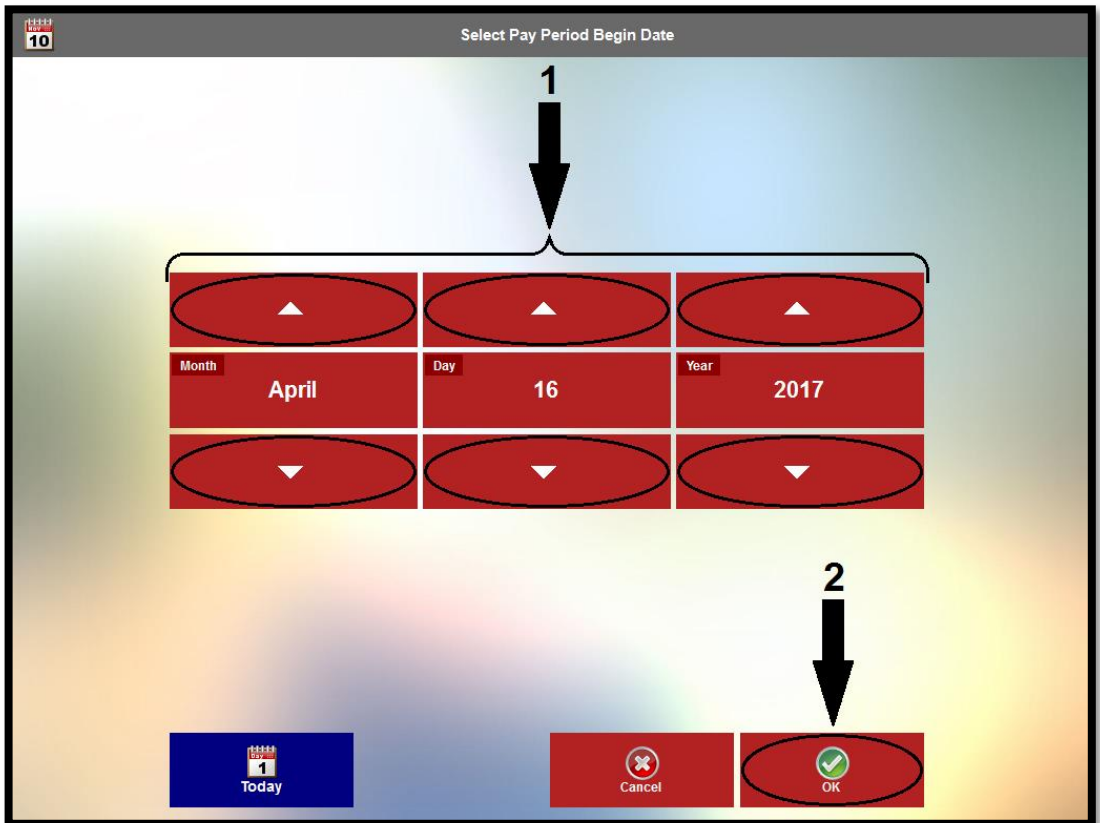


Figure 7-66

## Review Time Cards

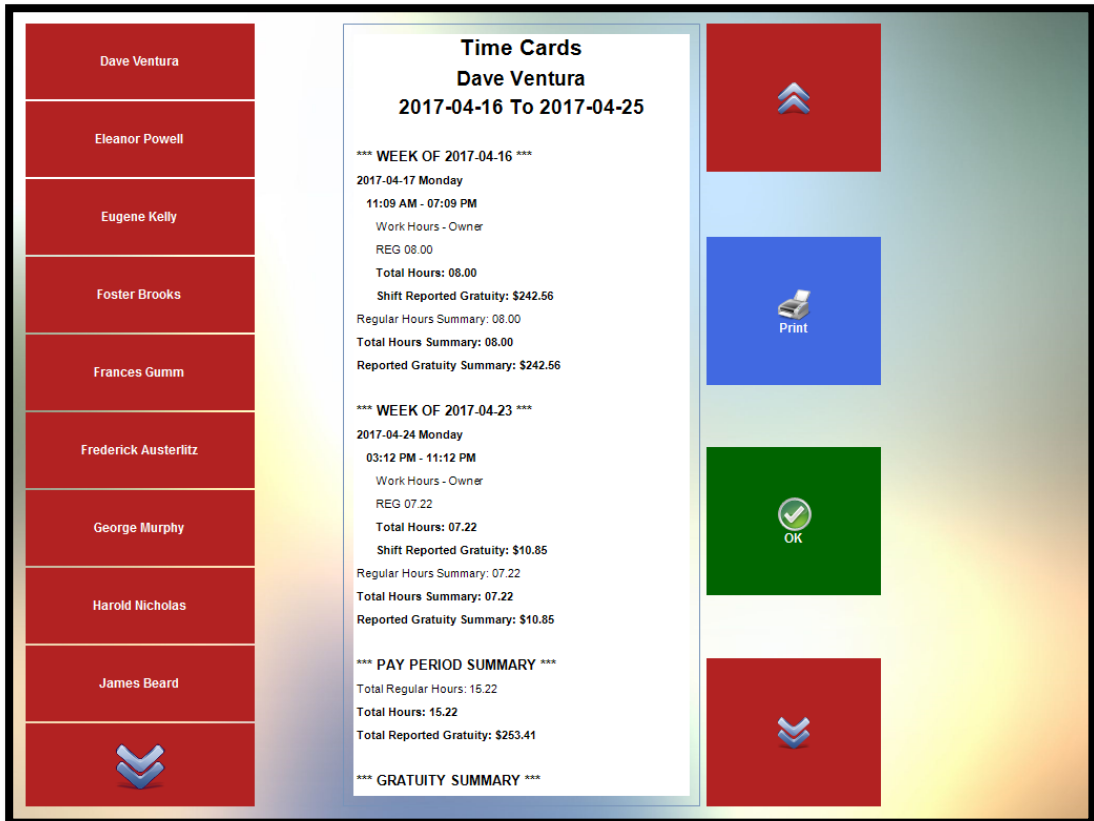
The **Review Time Cards** feature displays the selected employee's time cards for the selected pay period. To review an employee's time cards, click the "Review Time Cards" button to display the Select Pay Period Begin Date screen. Select the beginning date of the desired pay period by using the up and down arrow buttons to adjust the month, day of the month, and year until the desired date displays. Click the "OK" button to continue (See Figure 7-67).



**Figure 7-67**

The following screen is identical to the previous screen, but you must select the ending date of the desired pay period.

Upon completion of the entry of the beginning and ending pay period dates, the time cards for the selected employee display on the screen. If the report exceeds the limits of the screen, use the “up arrow” and “down arrow” buttons to scroll the report to reveal the hidden portions. To print a copy of the time cards report, click the “Print” button. The report prints to the terminal’s default receipt printer. When finished reviewing the time cards, click the “OK” button to return to the previous screen (See Figure 7-68).



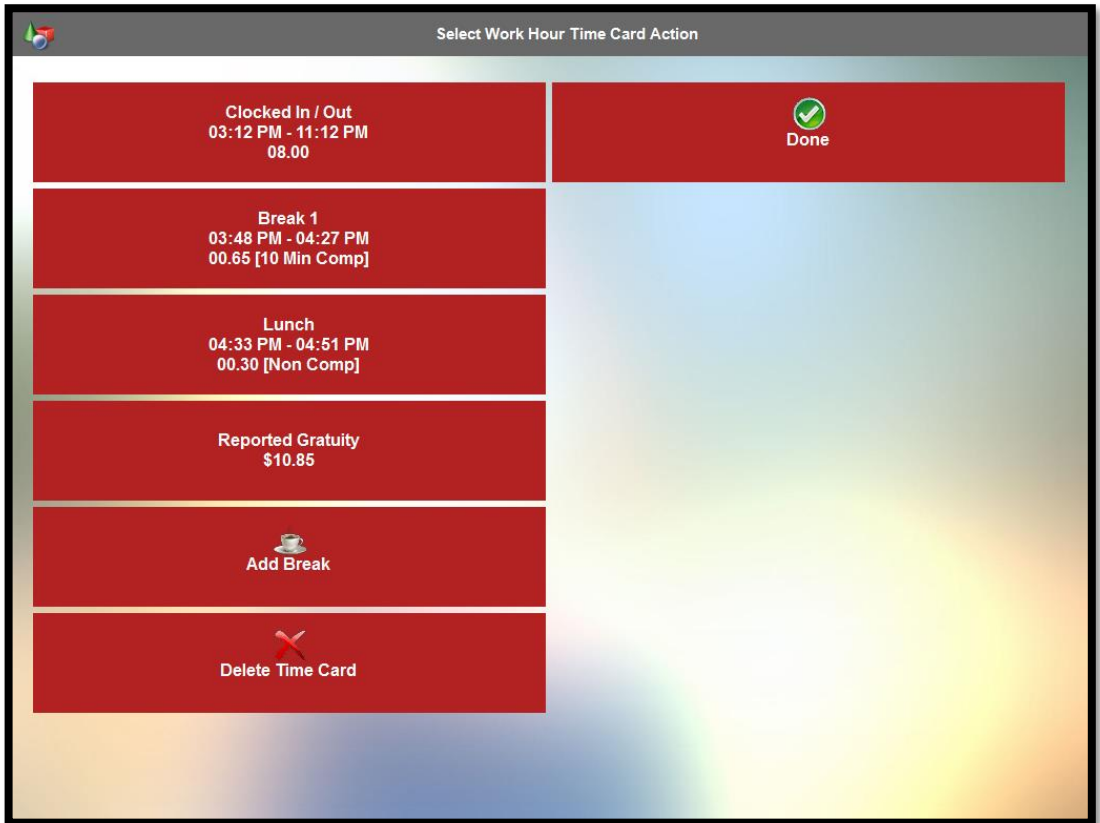
**Figure 7-68**

## Edit Time Cards

The **Edit Time Cards** feature allows the user to make any necessary adjustments to time cards. Time cards may be reviewed and added, and time card exceptions may be reviewed. Click the “Edit Time Cards” button to access the time card editing features.

## Time Cards

Click the button on the left side of the screen that corresponds with the desired employee and then click the “Time Cards” button to display the employee’s time cards recorded for the pay period. Select the work day from the center column to display the workday’s time card information in the right column. To edit a time card, click its button in the right column to reveal the Select Work Hour Time Card Action screen (See Figure 7-69).



**Figure 7-69**

On this screen you may edit the information previously recorded for the selected time card. Click the appropriate button and then edit the desired shift, break, or lunch clock in and clock out times. You may also add a break or delete an entire time card, if necessary.

## Time Exceptions

Click on the desired employee's name and then click the "Time Exceptions" button to view the exceptions to the scheduled times that the employee clocked in or out for his work shifts, work breaks, and lunch periods. One button appears in the grid for each recorded time exception. Select the desired time exception by clicking its button in the grid (See Figure 7-70).

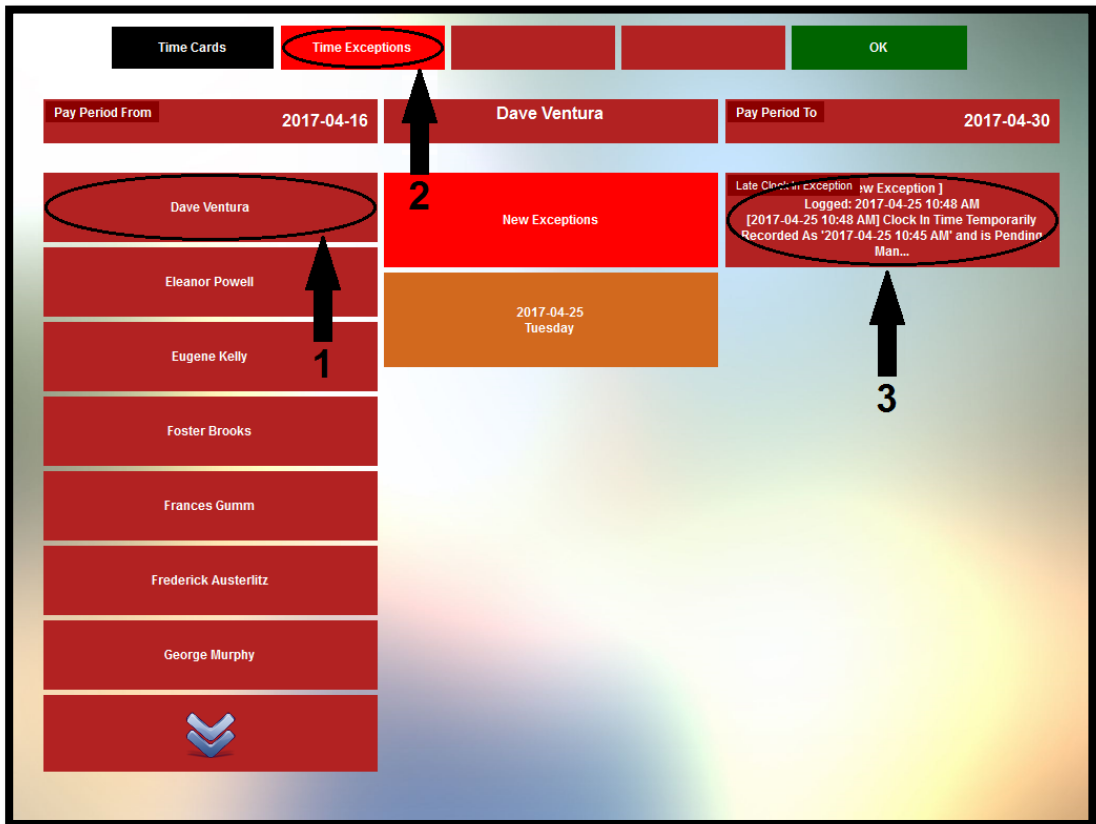
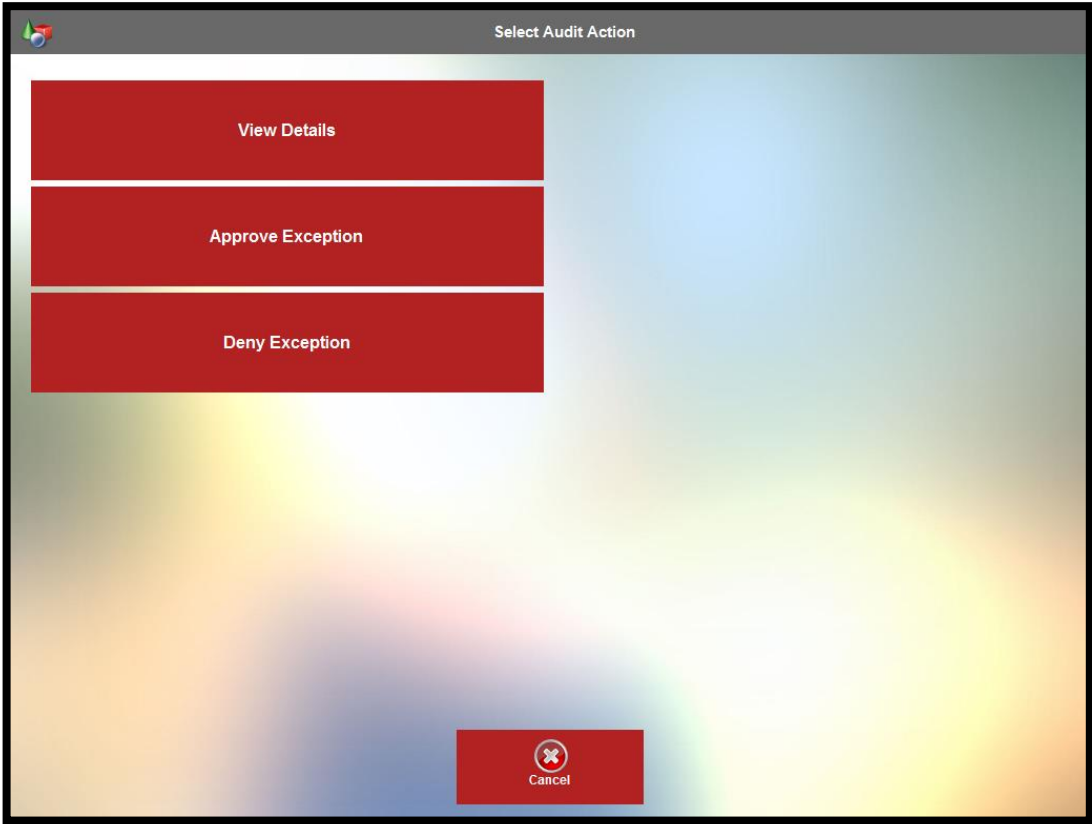


Figure 7-70

**Select Audit Action**

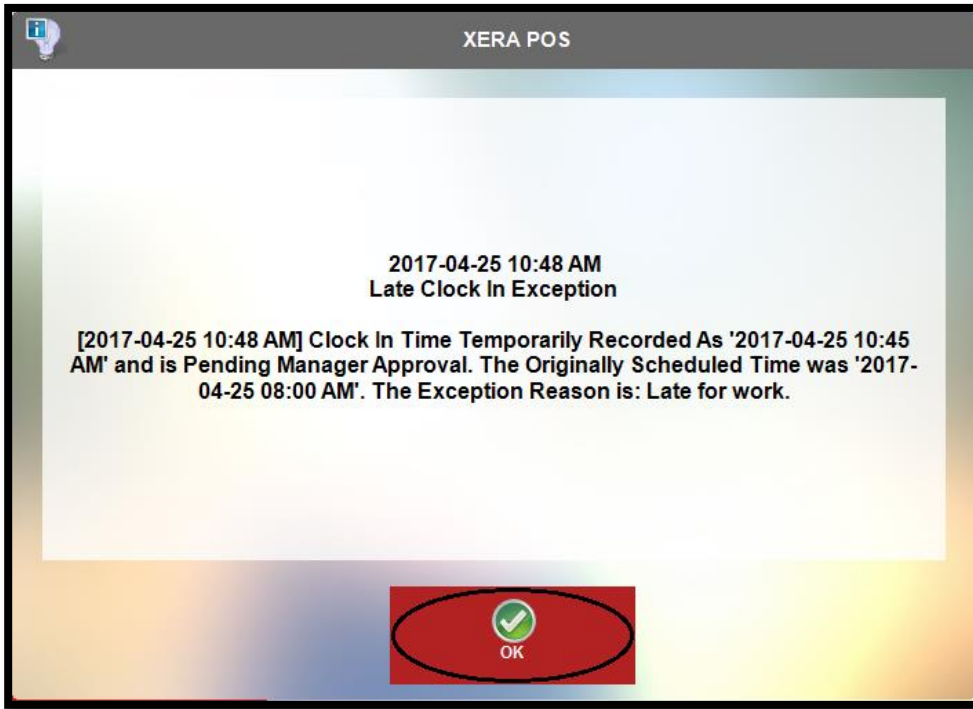
When you select a time exception as described above, the Select Audit Action screen displays. Select the desired action by clicking its respective button (See Figure 7-71).



**Figure 7-71**

#### “View Details” Button

Click the “View Details” button to display detailed information for the selected time exception. The entire text of the exception appears in the detail window. When finished, click the “OK” button to close the detail window and return to the previous screen (See Figure 7-72).



**Figure 7-72**

#### “Approve Exception” Button

Click the “Approve Exception” button if you wish to approve the selected time card exception.

#### “Deny Exception” Button

Click the “Deny Exception” button if you do not wish to approve the selected time card exception. If prompted, enter the reason for the denial.



### Add Time Card

Click the “Add Time Card” button if you need to add a missed break reimbursement, missed lunch reimbursement, additional work hours, personal hours, or vacation hours. To do so, click the appropriate button on the Select Time Card Type screen and then enter the desired time card date in the Enter Time Card Date screen by using the arrow buttons to select the month, day of the month, and the year of the time card date. Click the “OK” button when finished (See Figure 7-73).

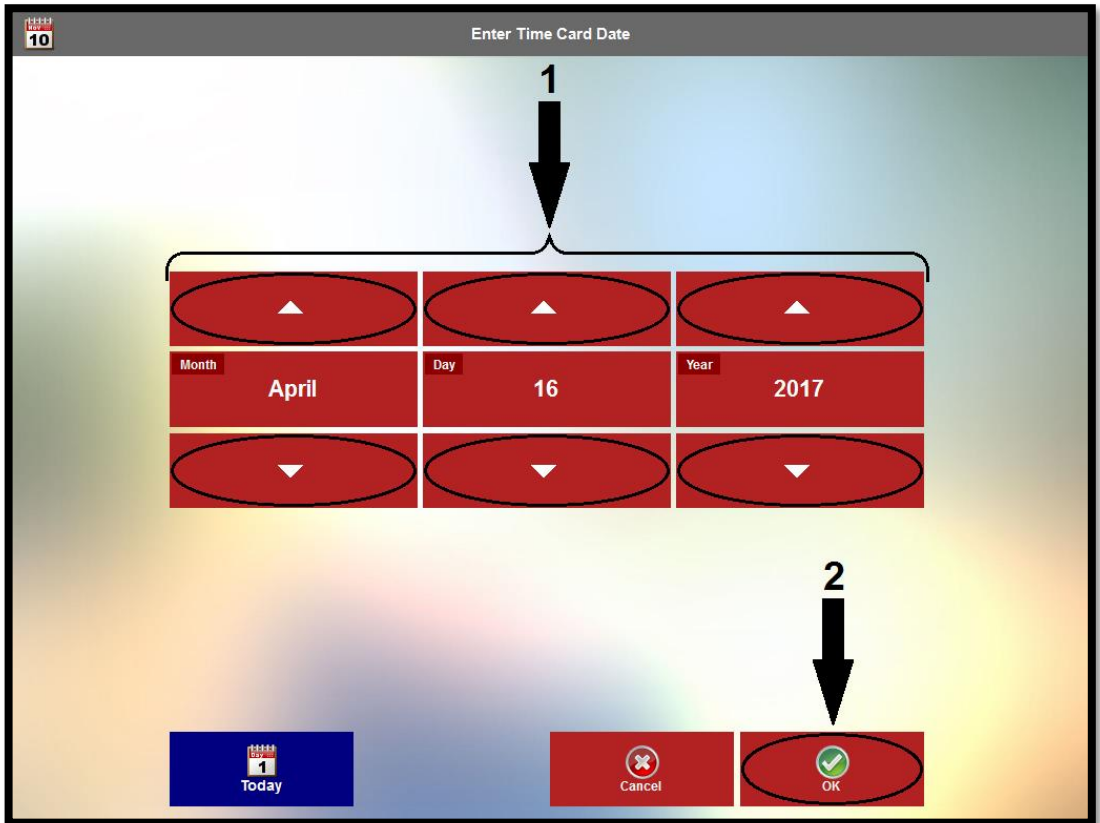


Figure 7-73

### Review Time Cards

The **Review Time Cards** feature displays the selected employee’s time cards for the selected pay period. To review an employee’s time cards, follow the steps listed under the section titled **Review Time Cards** on page 125 of this manual.

**OK**

Click the “OK” button when you finish editing your time cards to return to the previous screen.

**Report Gratuity**

The **Report Gratuity** feature allows the selected employee to report the gratuities he received during his current work shift. Click the “Report Gratuity” button to display the Enter Gratuity Total to Report screen.

The employee must use the displayed virtual keypad to enter the total gratuities collected from his customers during his work shift, while being sure to click the “Enter” button when finished to save the entry. Please note that if the reported gratuity is less than the minimum calculated amount allowed from the qualified sales, an error message displays, advising the user to enter a greater gratuity amount.

### Edit Availability

The **Edit Availability** feature allows the user to add, delete, or make changes to the days of the week and the times of the day when an employee is available to work. To do so, select the desired employee by clicking his respective button on the left side of the screen to display his current recorded availability. Next, select the desired time period and availability type by clicking the appropriate buttons in the center column of the screen. This displays the employee’s current availability for the time period in the right column (See Figure 7-74).

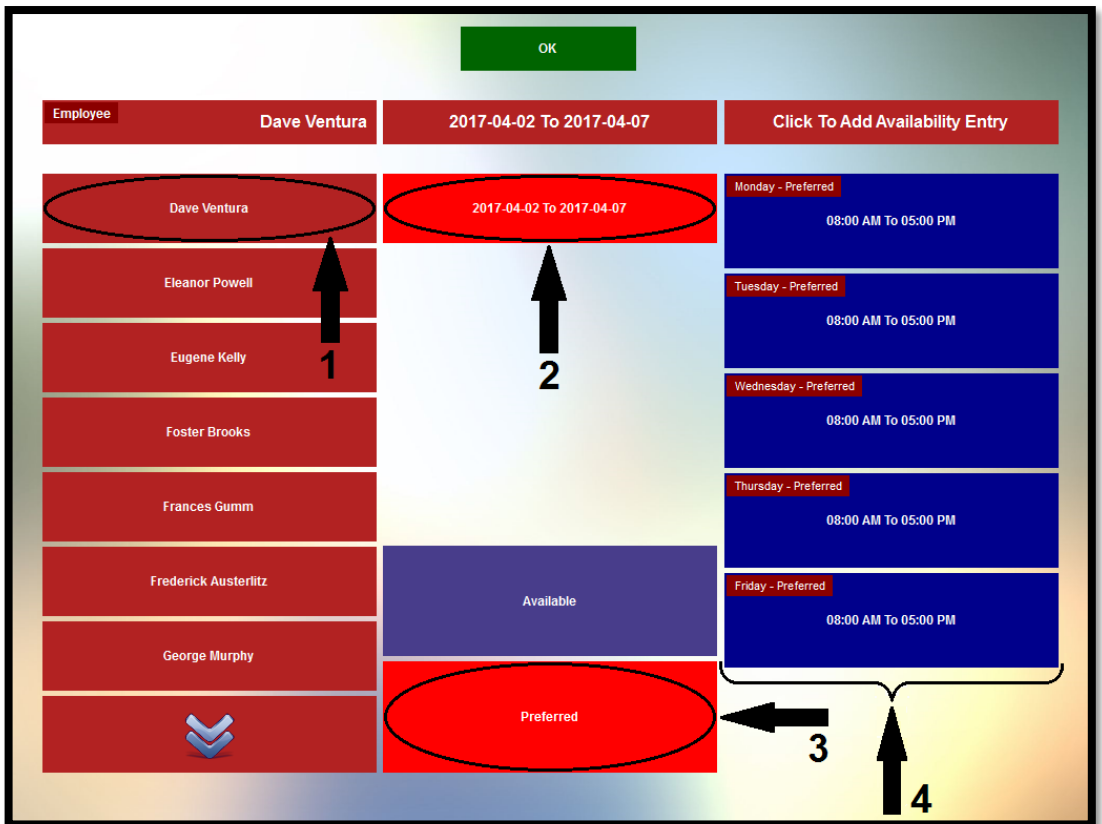


Figure 7-74

### Delete Availability Entry

To delete a current availability entry, click on the entry in the column on the right side of the screen to display the Delete Selected Availability Entry screen. Click the “Yes ... Delete This Availability Entry Now” button to complete the deletion.

**“Click to Add Availability Entry” Button**

Select this button to display the Add Availability Entry screen if you wish to add new availability dates and times to your availability list. Next, click the “Select New Availability Begin and End Dates” button. On the following screen, select the availability begin date by using the arrow buttons to select the month, day of the month, and the year of the availability begin date. Click the “OK” button when finished. Next you must select the availability end date in the same manner.

The Select Availability Day of Week screen displays. Select the desired day of the week by clicking on its respective button. On the Select Availability Preference Type screen, choose the availability type that you wish to add by clicking the appropriate button. Finally, select the availability begin time and end time on the following two screens. Click the “OK” button to save the new availability entry.

### Tip Pools Not Paid Out

The **Tip Pools Not Paid Out** feature allows the user to generate and view a list of any tip pools that have not yet been paid to their recipients. To generate the list, click the “Tip Pools Not Paid Out” button to display the Select Report Begin Date screen. On this screen, use the “up” and “down” arrow buttons to select the appropriate report begin date. Click the “OK” button when finished. On the following screen, select the appropriate report end date in the same manner, being sure to click the “OK” button when finished.

A report displays that shows the tip pool distributions for the selected date range that have not yet been distributed to their recipients (See Figure 7-75).

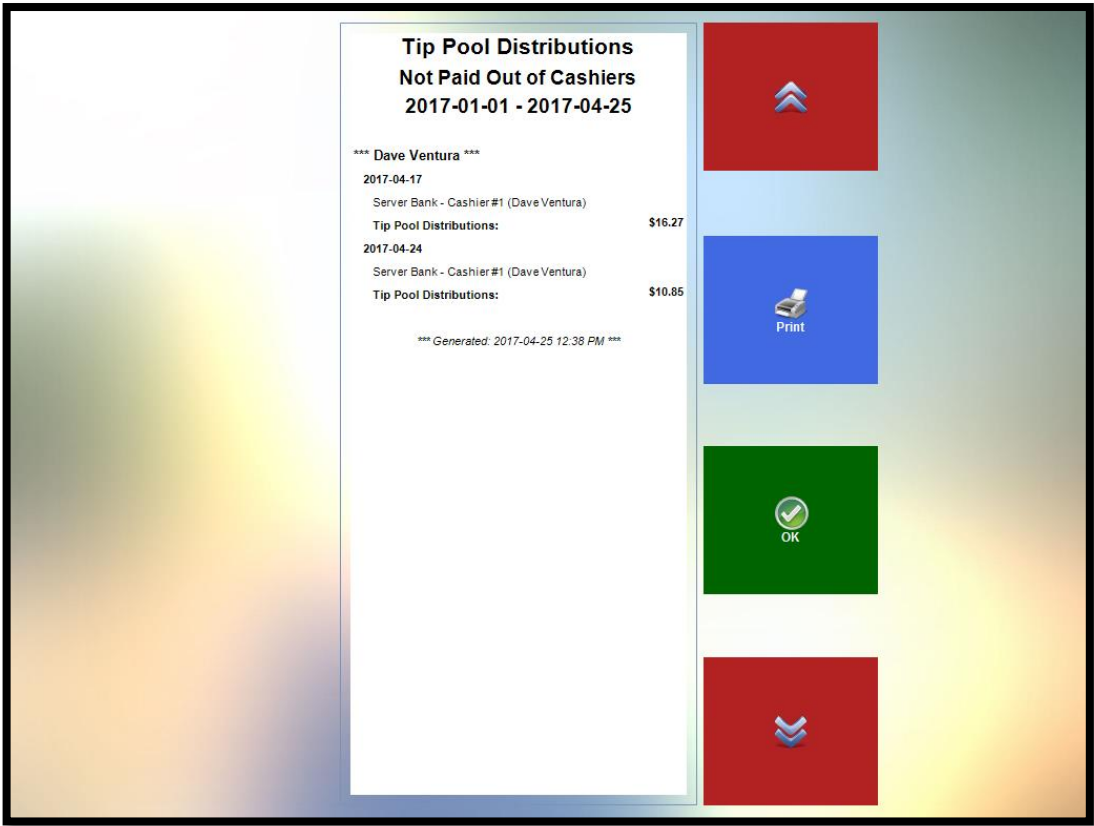


Figure 7-75

## Still Clocked In List

The **Still Clocked In List** feature allows the user to display a list of those employees who have clocked in for their work shifts but have not yet clocked out. Simply click the button to display the list. If the list exceeds the limits of the screen, use the arrow buttons to scroll the list up or down to reveal the list's hidden portions (See Figure 7-76).

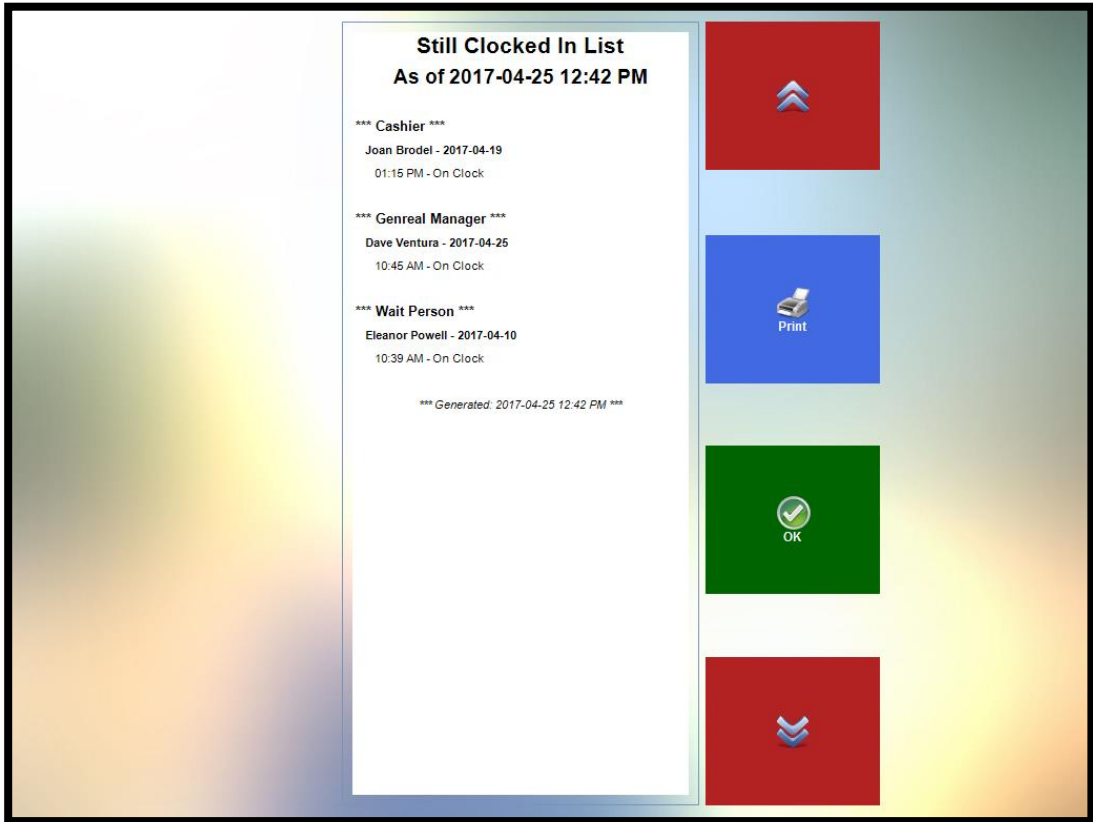


Figure 7-76

## Customer

The **Customer** feature of XERA® POS allows the user to add new customers, lookup existing customers, and edit existing customers. This customer information is used for loyalty rewards programs and marketing purposes.



### “New” Button

Click the “New” button to create a new customer. The “New” button is replaced by the “Save” button. Enter the customer’s information in the Phone, E-mail, First Name, Last Name, and Company fields (please note that only the Phone and First Name fields are required; the rest of the fields listed above are optional at the discretion of the management).

### “Profile” Button

More details about the customer may be entered by clicking the “Profile” button to reveal additional information fields. To enter information in these fields, click on the desired field to select it and then enter the information by using the virtual keyboard. Click the keyboard’s “Enter” button when finished entering the information to save it to the field.

In some cases, these fields are prepopulated with information. The information in these fields is entered by clicking on the desired field and then selecting the appropriate choice from the displayed buttons. Upon making your selection, the field’s information is updated.

Additional fields may be displayed by clicking the “up arrow”  and “down arrow”  buttons on the right side of the screen.

If you click on a field and nothing happens, then the field is non-editable. Non-editable fields are populated automatically with information obtained from your computer and/or XERA® POS.

### “Memo” Button

The **Memo** feature allows you to enter a text memo for the selected customer in a freehand manner. Click the “Memo” button to display the Memo field. Click inside the Memo field to display the Enter Memo... screen. Enter your memo by using the virtual keyboard. Be sure to click the “OK” button to save your memo and return to the previous screen.

To delete an existing memo, navigate to the Enter Memo... screen, delete the text in the field at the top of the screen, and then click the “OK” button. On the confirmation screen that appears, select the “YES ... Remove Existing Memo” button to complete the deletion and return to the previous screen.

### “Save” Button

Upon entering all of the new customer’s information, click the “Save” button to add the new customer to the customer list.

### **“Search” Button**

Click the “Search” button if you wish to display the information for an existing customer and then enter the search criteria into one of the following fields: Phone, E-mail, First Name, Last Name, or Company. Click on the desired field and then enter the search criteria via the virtual keyboard. For the phone number, you must enter the entire number as it was entered when the customer record was initially created. For the rest of the fields, it is not necessary to enter the field’s entire information. Entering just the first few characters causes an incremental search to be performed. If multiple records match the characters entered, the Select Customer screen displays a button for each matching record. Select the appropriate customer button by clicking on it. The customer record displays.

### **“Lookup Address” Button**

Click the “Lookup Address” button if you wish to search for a customer by his postal address. The Find by Address screen displays. Enter the customer’s postal address in the field at the top of the screen via the virtual keyboard and then click the “OK” button. It is not necessary to enter the entire postal address. Entering just the first few characters causes an incremental search to be performed. If multiple records match the characters entered, the Select Customer screen displays a button for each matching record. Select the appropriate customer button by clicking on it. The customer record displays.

### **“OK” Button**

Click the “OK” button when you are finished reviewing your customer records to return to the Misc screen of XERA® POS.

## **Driver Dispatch**

The **Driver Dispatch** feature allows the assignment of delivery orders to your delivery drivers. To assign an existing Delivery Type order to a driver, click the “Recall” button on the main screen of XERA® POS and select the order to be delivered by clicking on it in the displayed grid of existing orders. The recalled order displays on the screen. Next, click the “Misc” button at the bottom of the screen and then click the “Driver Dispatch” button to display the Driver Dispatch screen. Any pending delivery orders appear as tiles on the screen under the appropriate heading on the grid (Awaiting Dispatch, Assigned, or En Route). When finished, click the “Assign” button at the bottom of the screen. The order is moved to the Assigned column while awaiting departure.

### **Select Custom Driver**

Select the driver you wish to dispatch by clicking on his name under the Driver column or click the “Select Custom Driver” button and then select your desired driver from the displayed list. Finally,



select the order or orders you wish to assign to the selected driver by clicking on each of them under the Awaiting Dispatch column.

### Review Order

To review the items on an order that is displayed on the Driver Dispatch screen, select the order by clicking on its tile in the grid and then click the “Review Order” button. The order contents appear, allowing the user to view or print it. The up and down arrows allow you to scroll the order to see any portions of it that are hidden. Click the “OK” button when finished to return to the previous screen.

### Assign

Once you have selected your desired driver and the orders to assign to him, click the “Assign” button at the bottom of the screen. The orders are moved to the Assigned column while awaiting departure.

### Unassign

To reverse the assignment of a delivery order to a driver, select the driver and the order by clicking on them in the grid and then click the “Unassign” button. The selected order is immediately returned to the Awaiting Dispatch column.

### Email Driver

Click the “Email Driver” button anytime your driver is out on a delivery run and you wish to send him an e-mail message. Please note that this feature requires you to configure the SMTP Mail Server options in the XERA® POS Manager application by navigating to **Company Tab > Settings > Store Settings > Notification Mail Settings**

### Departure

When the driver is ready to begin his delivery run, select his name under the Drivers column by clicking on it and then click the “Departure” button. At this point, you are given the option to send an e-mail message to the driver. Click the “YES...Email En Route Orders Dispatch List Now” button if you wish to send the driver a message (See the section titled Email Driver, above). Click the “NO...Do Not Email at This Time” button if you do not wish to send the driver a message. At this point, all orders that are assigned to the selected driver are immediately moved to the En Route column.

## Cancel Departure

To reverse the departure of a delivery driver, select the driver by clicking on his name in the grid and then click the “Cancel Departure” button. The selected driver’s delivery orders are immediately returned to the Assigned column.

## Arrival

When the driver has returned from his delivery run, select his name under the Drivers column by clicking on it and then click the “Arrival” button. All orders that were assigned to the selected driver are immediately removed from the En Route column.

## Money Drop

Upon returning from a delivery run, the driver must click the “Money Drop” button to deposit any cash collected from the customer in payment for his delivery order. Upon clicking the “Money Drop” button, the Choose Order to Review screen appears. This screen allows the user to select an order to review from the grid by clicking on it. The order displays in the Review Order panel. If necessary, click the up and down arrow buttons to scroll the order to reveal any hidden portions. If desired, click the “Print” button to print a hard copy of the order. Click the “OK” button when finished to return to the previous screen.

To perform the money drop, click the “Finalize Money Drop” button to display the Money Drop Cash Portion screen. This screen displays the total amount of cash due from the customer for his delivery order.

## Time Card

The “Time Card” button allows the user to clock in and out for work shifts, breaks, and lunch periods directly from the Driver Dispatch screen, thereby saving the user the several keystrokes required to exit the Driver Dispatch screen and navigate to the Time Card feature on the main screen of XERA® POS.

## Count Down List

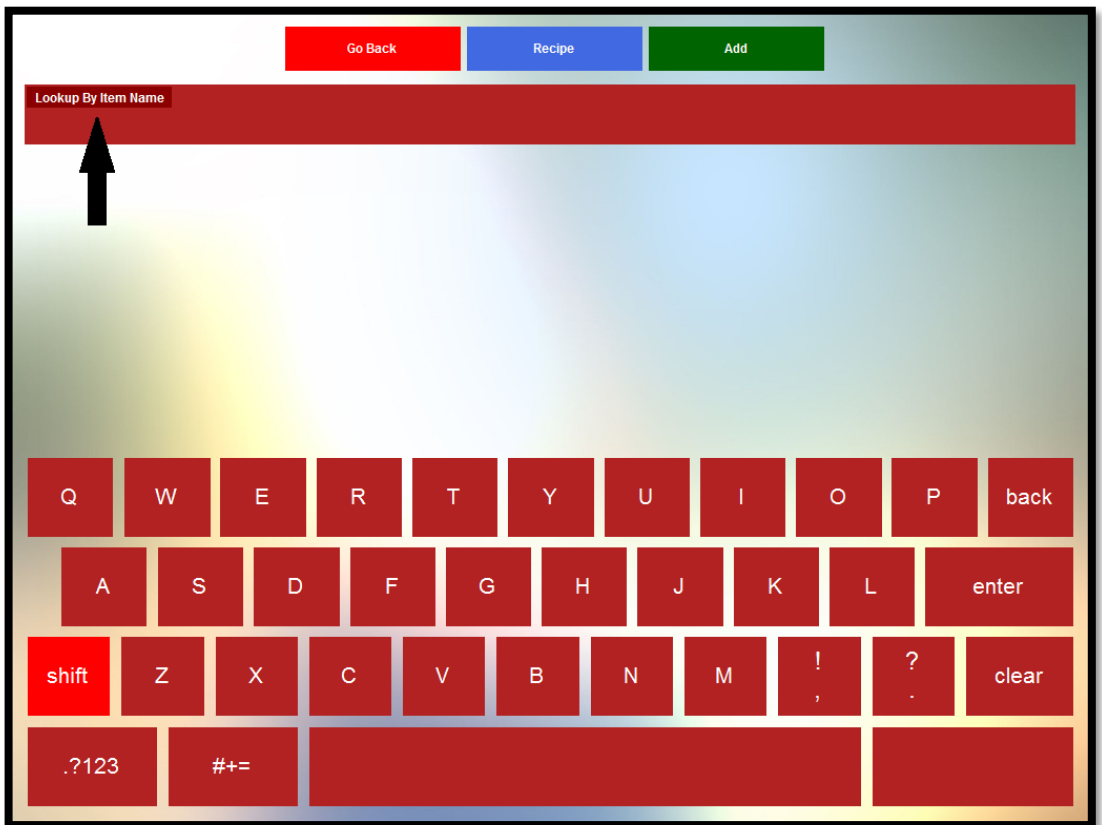
The **Count Down List** feature allows the manager to enter the quantity of an individual menu item that is remaining in stock. Each time one of these menu items is ordered, the number remaining is decremented by one and this number displays on the face of the menu item’s button on the order entry screen. 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 wait person 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 want 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 near the upper left portion of the screen (See Figure 7-77).



**Figure 7-77**

### 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-numeric keyboard at the bottom of the screen. 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 near the top of the screen. It is not necessary to enter the name from the beginning, as the search returns a list of all items that contain the entered character string, even if they do not appear at the beginning of the item name. As each additional character is entered, the list is filtered further, reducing the number of menu items that contain the string of characters entered thus far. As soon as your desired menu item appears in the grid, 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 7-78).

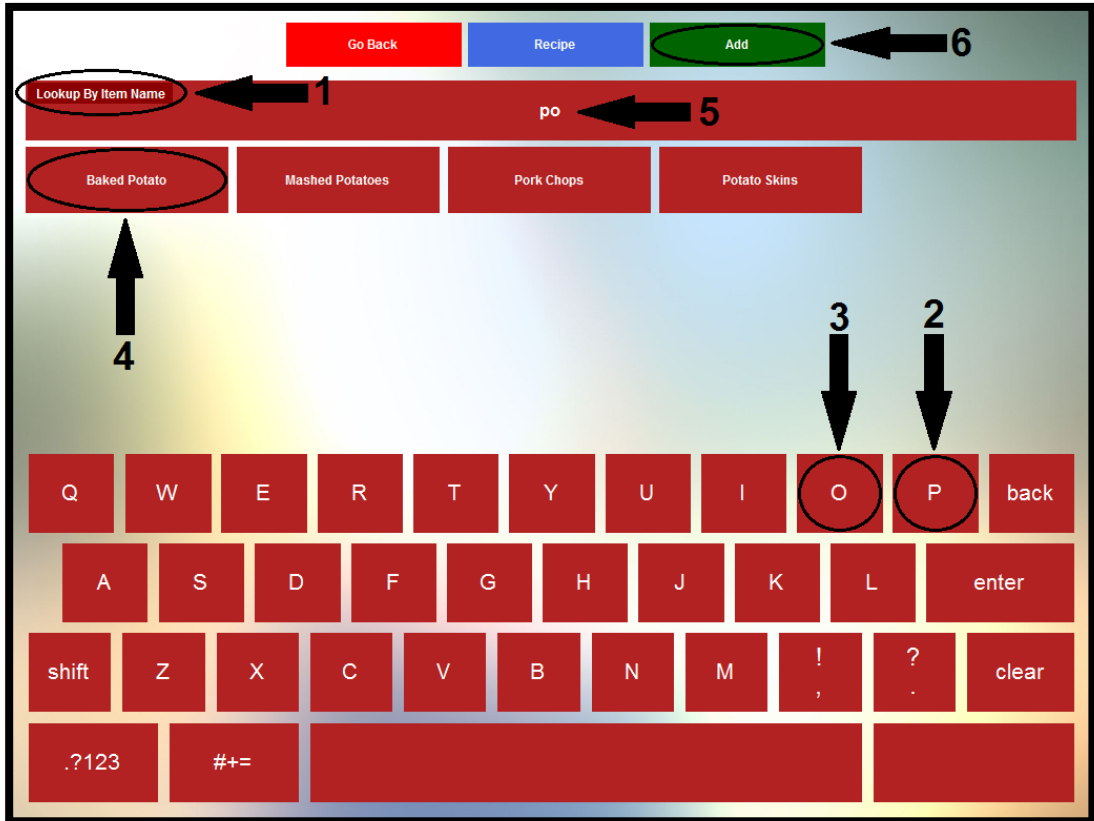
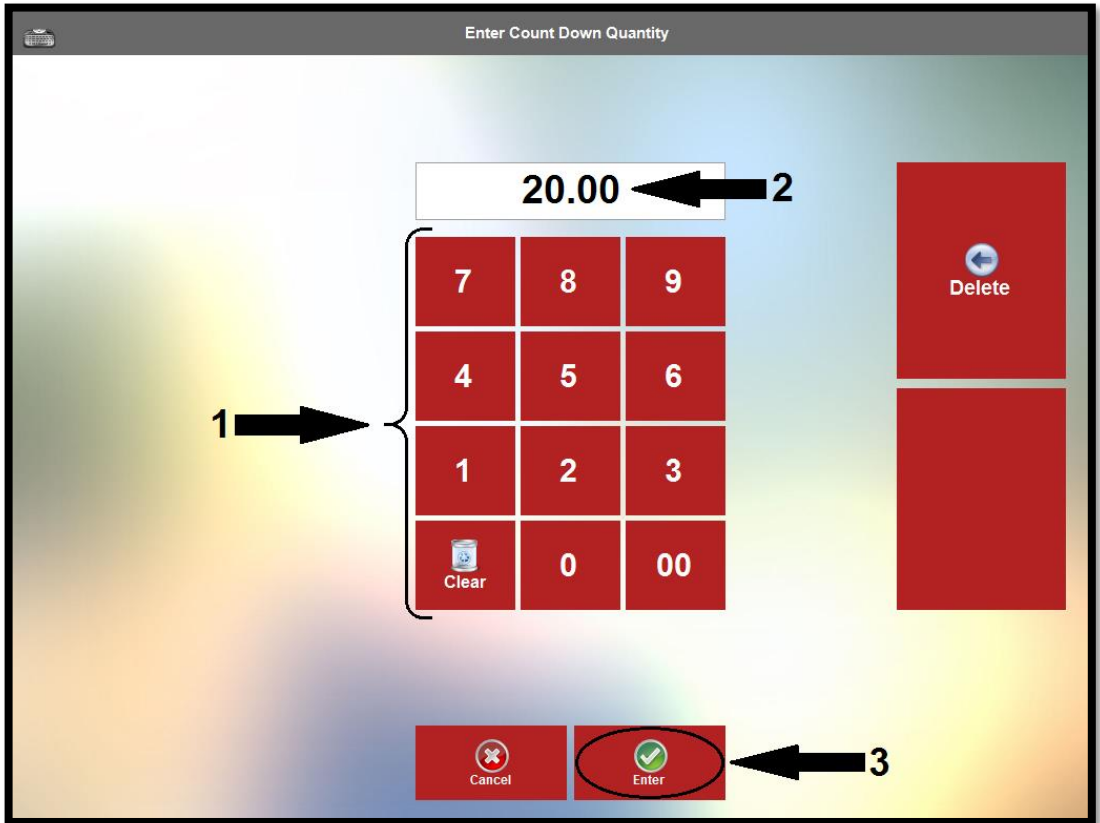


Figure 7-78

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. Fractional menu item quantities may also be entered in decimal format. As this number is entered, it displays in the field directly above the keypad. When finished, click the “Enter” button to add the menu item to the Count Down List (See Figure 7-79).



**Figure 7-79**

### Recipe

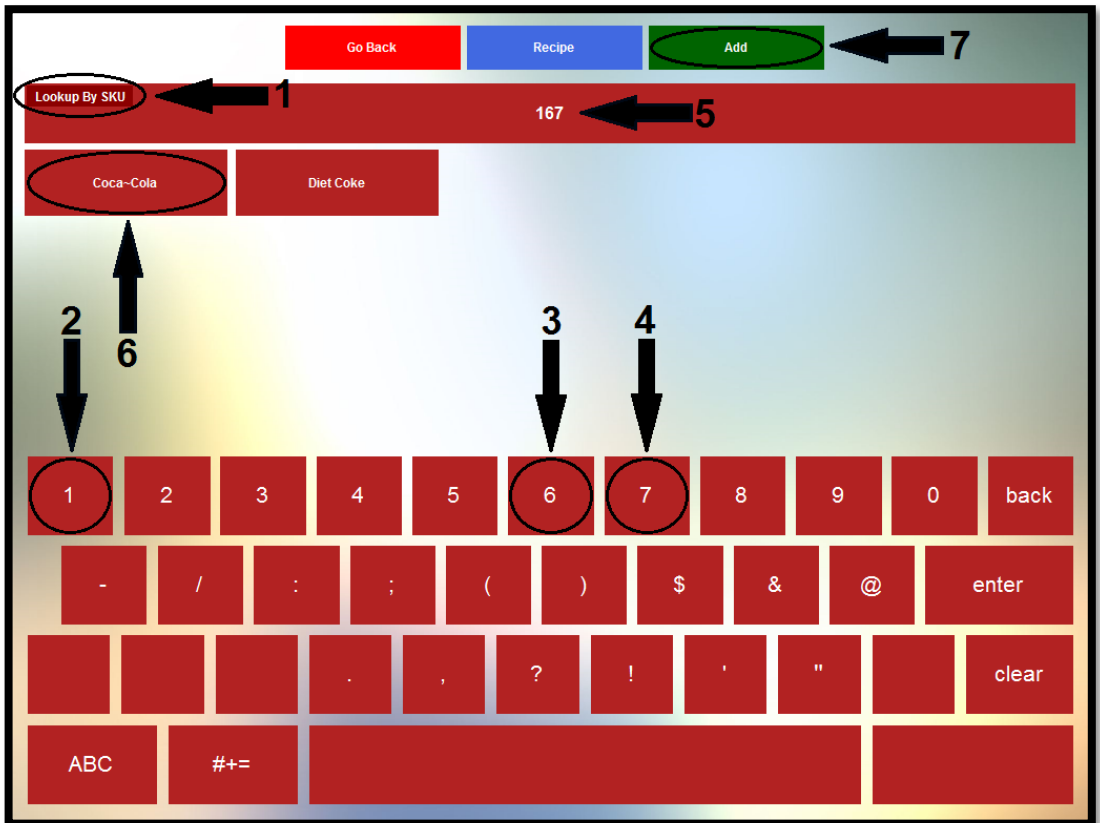
After selecting the menu item from the grid, click the “Recipe” button if you wish to view the recipe information that was entered for the menu item in the XERA® POS Manager application. Please note that if the optional recipe information has not been entered for the menu item, then nothing displays 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

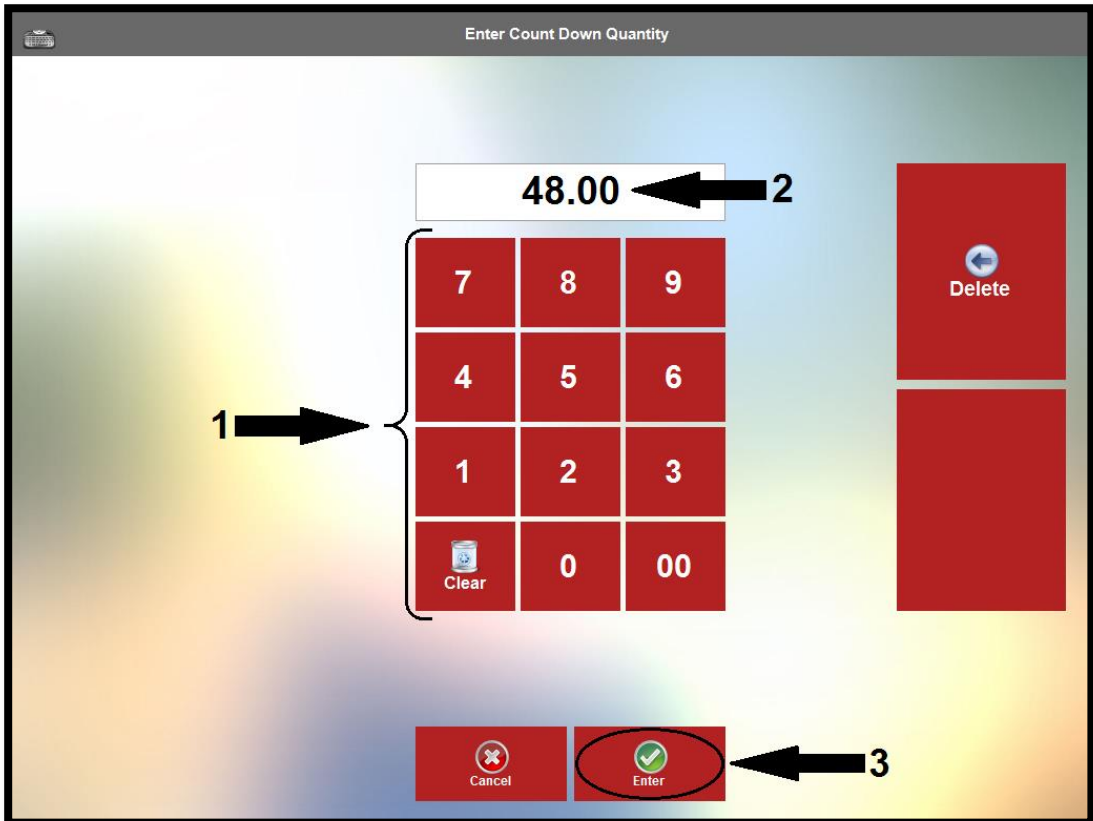
To lookup a menu item by the SKU (Stock Keeping Unit), click the lookup method button repeatedly until the caption on the button reads **Lookup By SKU**. Next, enter the SKU by using the virtual keyboard at the bottom of the screen. If necessary, click the “.?123” button at the bottom left of the alpha keyboard to display the numeric virtual keyboard instead. 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 SKUs contain the character string entered thus far appears in the grid near the top 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 thus far. As soon as your desired menu item appears in the grid, 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 7-80).



**Figure 7-80**

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. Fractional menu item quantities may also be

entered in decimal format. As this number is entered, it displays in the field directly above the keypad. When finished, click the “Enter” button to add the menu item to the Count Down List (See Figure 7-81).



**Figure 7-81**

### Recipe

After selecting the menu item from the grid, 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.

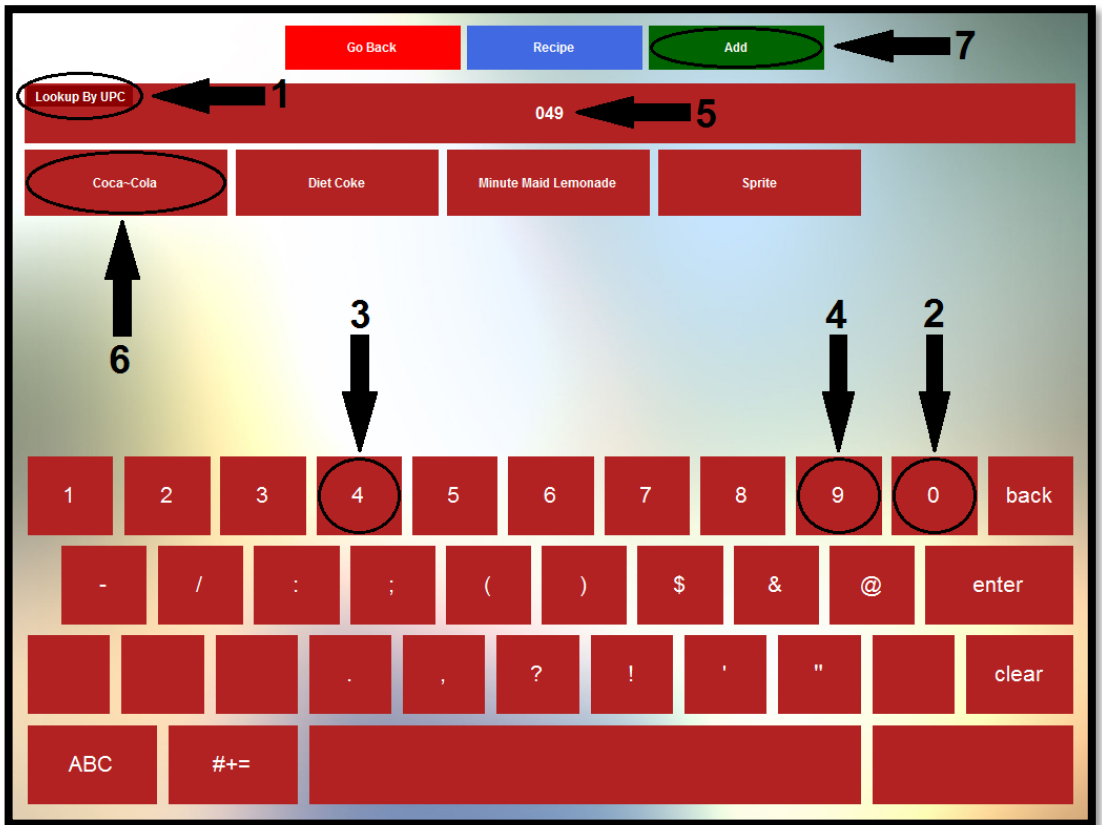
### Go Back

Click the “Go Back” button to exit the Count Down List Add Items screen without saving your changes.



**Lookup by Item UPC**

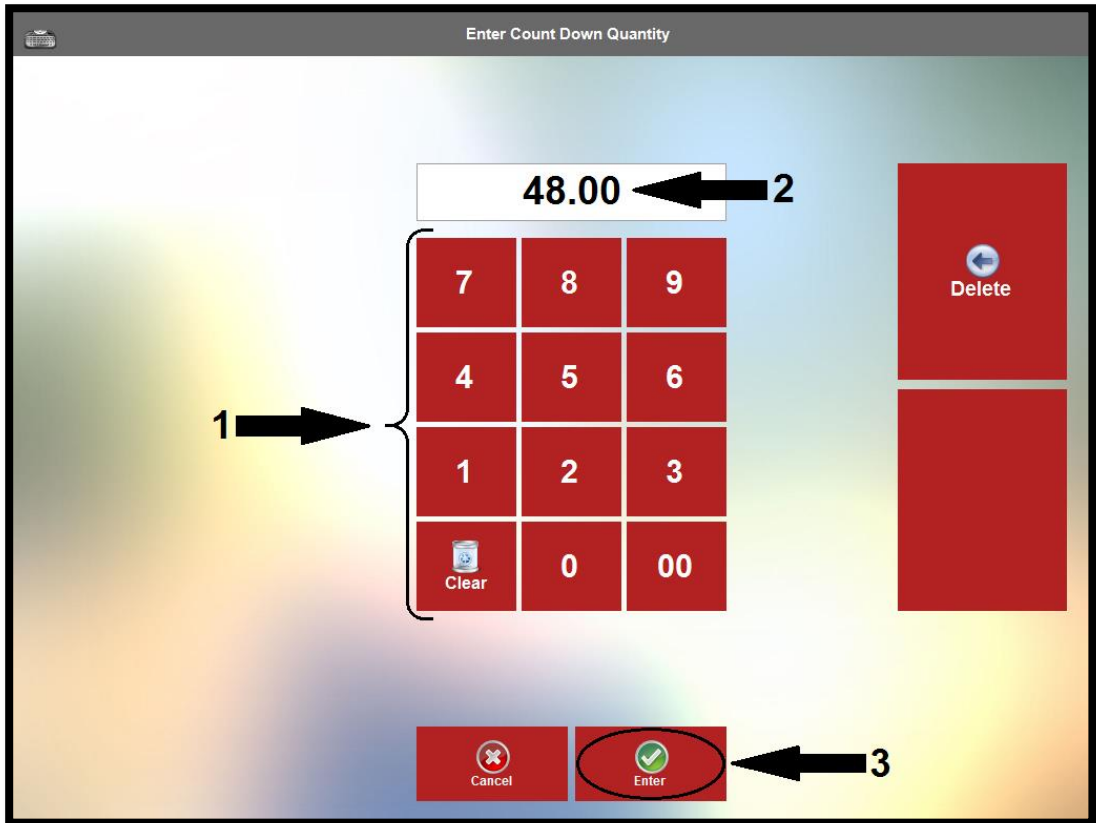
To lookup a menu item by the UPC (Universal Product Code), click the lookup method button repeatedly until the caption on the button reads **Lookup By UPC**. Next, enter the UPC by using the virtual keyboard on the bottom of the screen. As each character is entered, it appears on the lookup method button. At the same time, an incremental search is performed and a dynamic list of menu items whose UPCs contain the character string entered appears in the grid near the top 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 thus far. As soon as your desired menu item appears in the grid, 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. 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 7-82).



**Figure 7-82**

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. Fractional menu item quantities may also be

entered in decimal format. As this number is entered, it displays in the field directly above the keypad. When finished, click the “Enter” button to add the menu item to the Count Down List (See Figure 7-83).



**Figure 7-83**

### Recipe

After selecting the menu item from the grid, 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 7-84).

| Type   | Guests | Table #14       |
|--|--------|-----------------|
| Dine In - New/1 (Dave)   |        | Check 1         |
| Buffalo Wings  |        | \$6.95          |
| Stuffed Jalapeños  |        | \$4.95          |
| Maine Lobster  |        | \$22.95         |
| Rice Pilaf   |        |                 |
| Steamed Vegetables   |        |                 |
| Roasted Chicken  |        | \$12.95         |
| Mashed Potatoes  |        |                 |
| Steamed Vegetables   |        |                 |
| Diet Coke  |        | \$1.75          |
| <b>TABLE #: 14</b>   |        |                 |
| <div style="display: flex; justify-content: space-around;"> <span>Sub Total</span> <span>Tax</span> <span>Total</span> </div> <div style="display: flex; justify-content: space-around;"> <span>\$49.55</span> <span>\$3.66</span> <span>\$53.21</span> </div> |        |                 |
| Add Check  |        | Split / Combine |
|  |        | 1               |
| 1  | 2      | 3               |
| 4  | 5      | 6               |
| 7  | 8      | 9               |
| Clear  | 0      | Enter           |

|             |    |                     |                     |
|-------------|----|---------------------|---------------------|
| Appetizers  | 48 | Coca-Cola<br>\$1.75 | Diet Coke<br>\$1.75 |
| Bar         |    |                     |                     |
| Beverages   |    |                     |                     |
| Desserts    |    |                     |                     |
| Entrées     |    |                     |                     |
| Salads      |    | Coffee<br>\$1.75    | Hot Tea<br>\$1.75   |
| Side Dishes |    |                     |                     |

|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|

**Figure 7-84**



## 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 on the screen to the right of the guest check (See Figure 7-86).

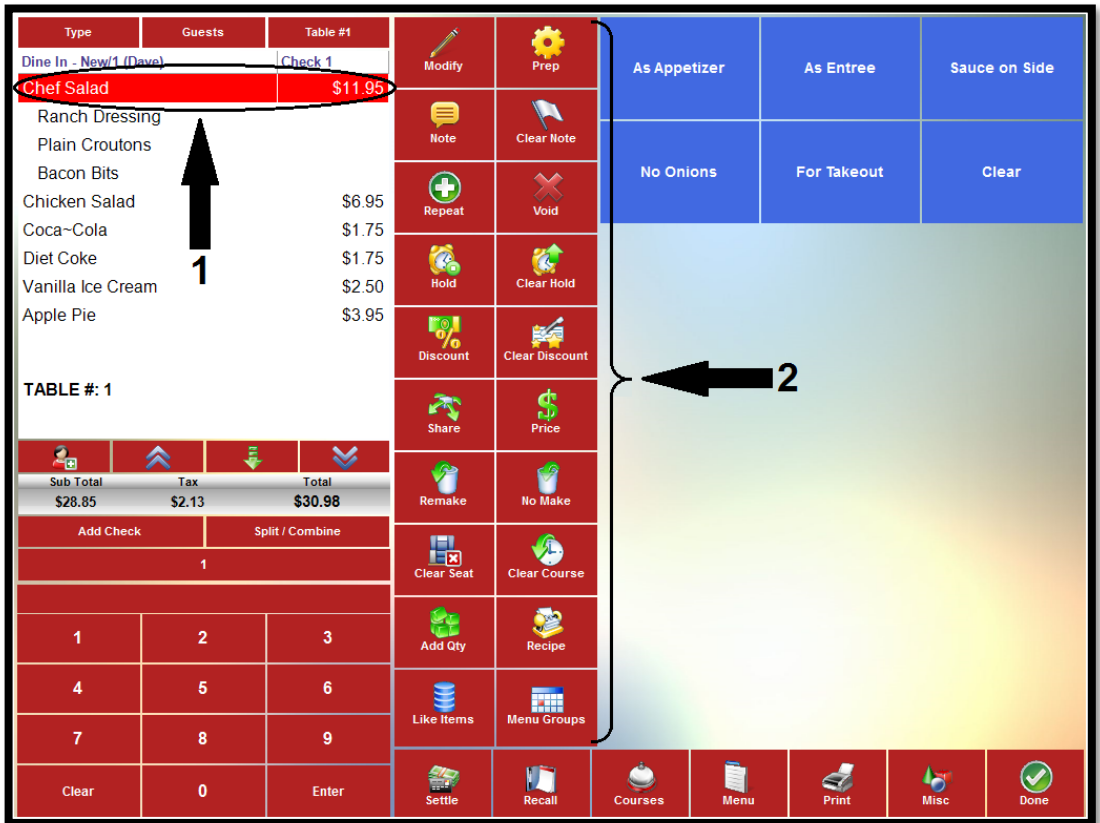


Figure 7-86

Please note that many of the actions described in the following subsections may be performed on multiple menu items. Select multiple menu items on the guest check by clicking on them in turn until all desired menu items are highlighted.

## **Modify**

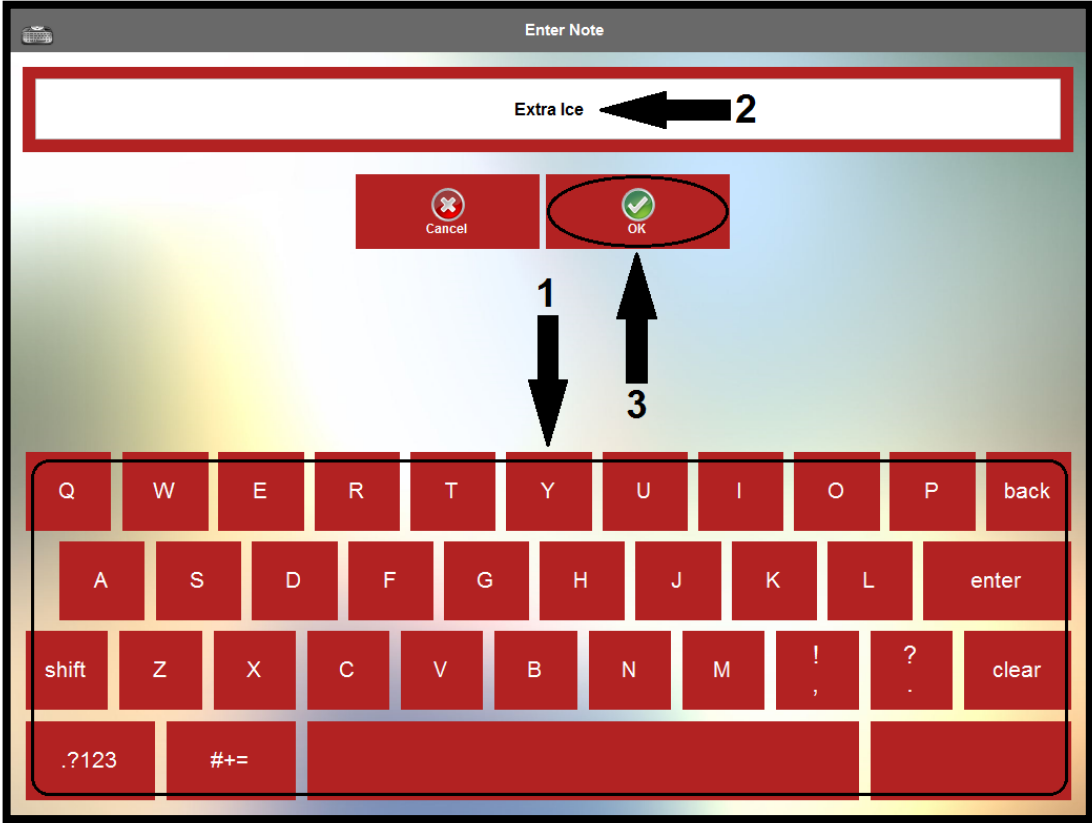
To make a change to a previously chosen modifier for a menu item, select the desired menu item from the guest check by clicking on it and then click the “Modify” button. The menu item’s modifier template displays, and the existing modifier selection is highlighted on the button grid. Click on the existing modifier to remove it from the menu item, and then click on the desired new modifier to add it to the menu item. The new modifier is then assigned to the menu item on the guest check. Continue in this manner until all desired modifiers are assigned to the menu item.

## **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. To use this feature on an item that is on the guest check, a Prep Modifier Template must have been assigned to a Prep Type and then that Prep Type must have been assigned to the menu item in the XERA® POS Manager application during the initial entry of the menu item.

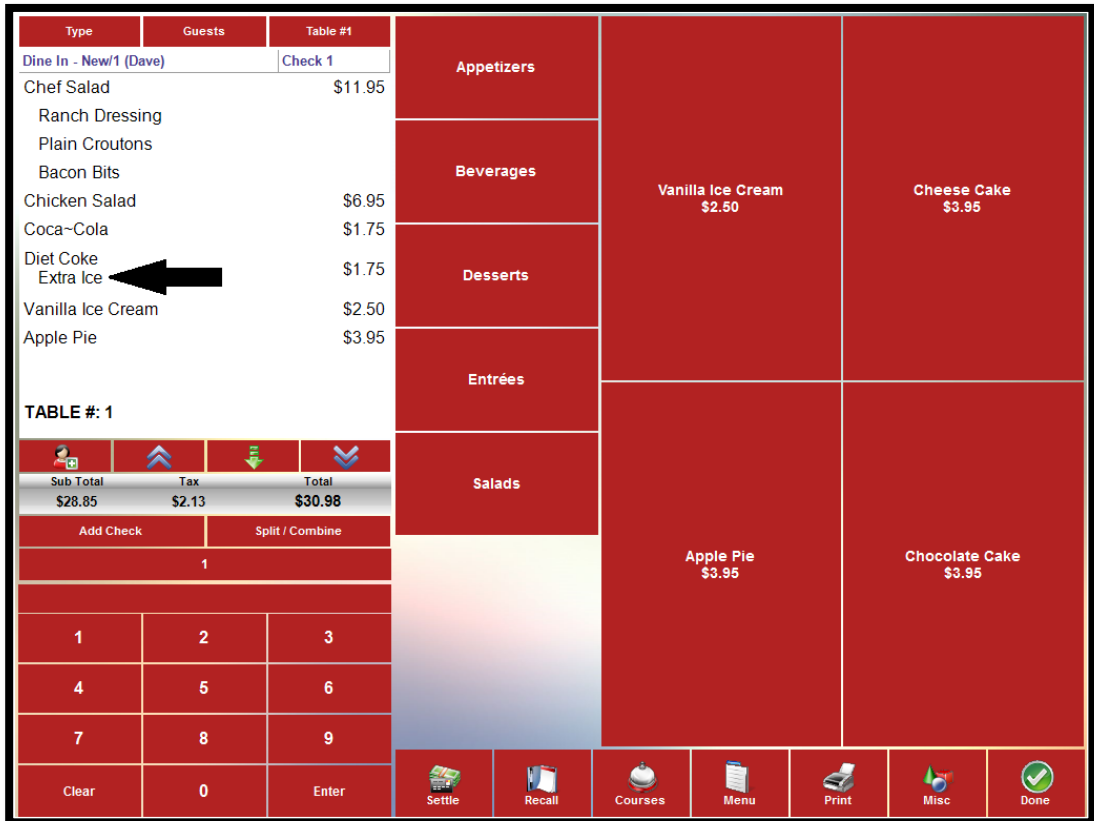
**Note**

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 virtual guest check and then click the “Note” button to display the virtual keyboard. Enter your note via this keyboard and then click the “OK” button when finished (See Figure 7-87).



**Figure 7-87**

The note is added to the selected menu item on the guest check (See Figure 7-88).



**Figure 7-88**

### 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 and their modifiers 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**

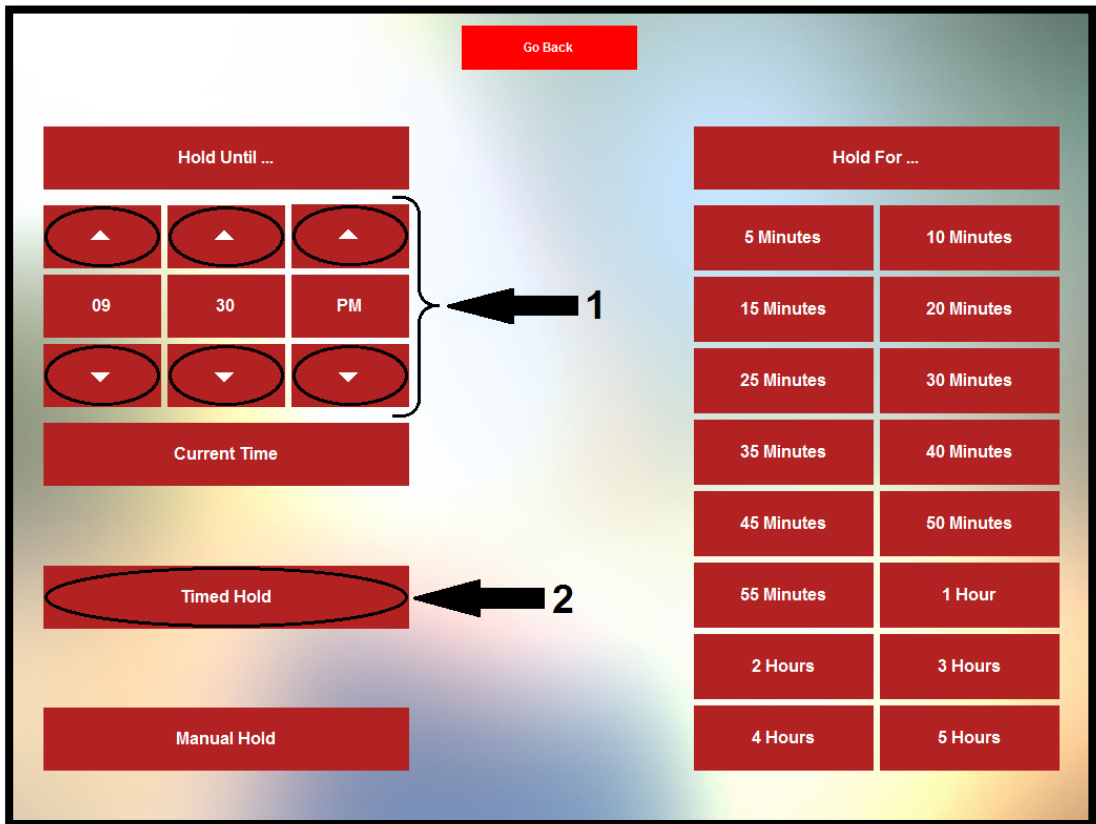
The **Void** feature allows the user to select one or more menu items to be deleted permanently from the guest check. To use the feature, select the item or items you wish to delete from the guest check by clicking on them. Next, click the “Void” button. Each of the menu items you selected is deleted 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 for those items 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 items.

### 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 and down arrow keys to change the time displayed on the keypad. When the desired time is reached, click the “Timed Hold” button to activate the hold (See Figure 7-89).



**Figure 7-89**

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 items. 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 items (See Figure 7-90).



**Figure 7-90**

### 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 7-91).



**Figure 7-91**

### Hold Time Display

As each type of hold is placed on the menu items, the display returns to the view of the guest check. The hold is listed directly below the selected 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 XM||, where XX:XX XM 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 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 items from the smart check by clicking on them. This highlights the selected menu items on the smart check. Next, click the “Clear Hold” button (See Figure 7-92).

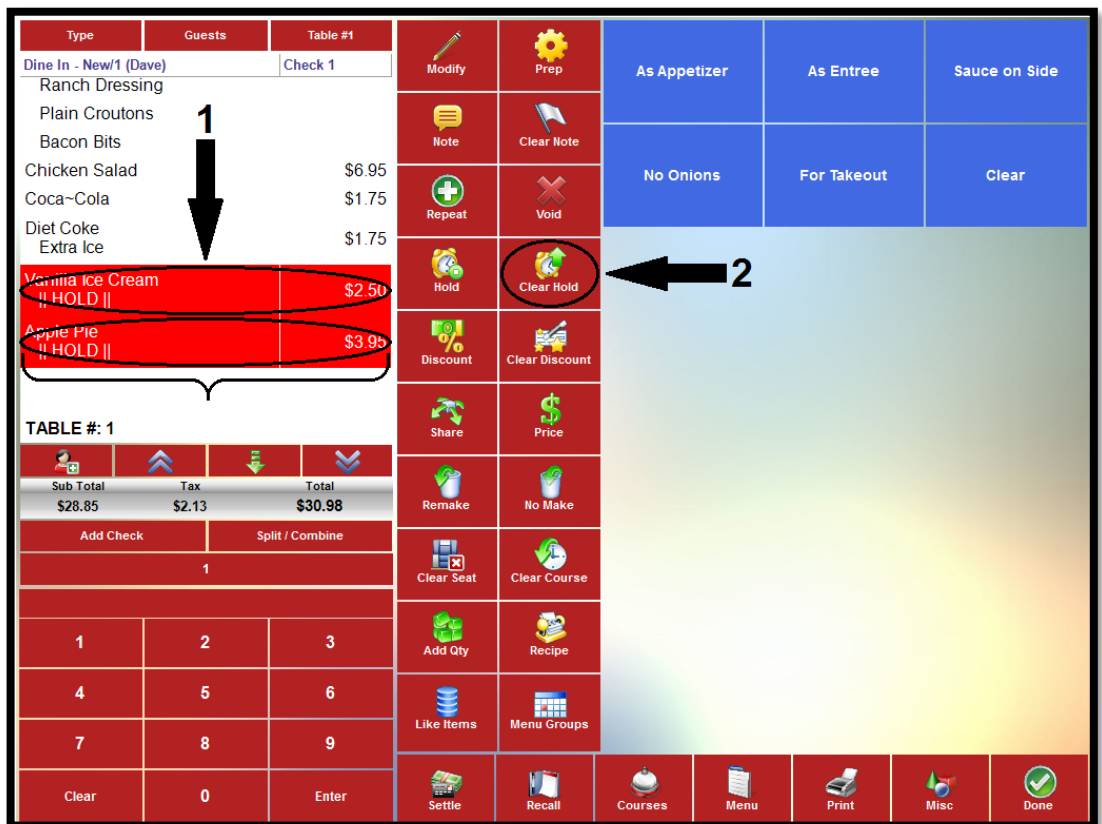


Figure 7-92

The holds on the selected menu items are cleared (See Figure 7-93).

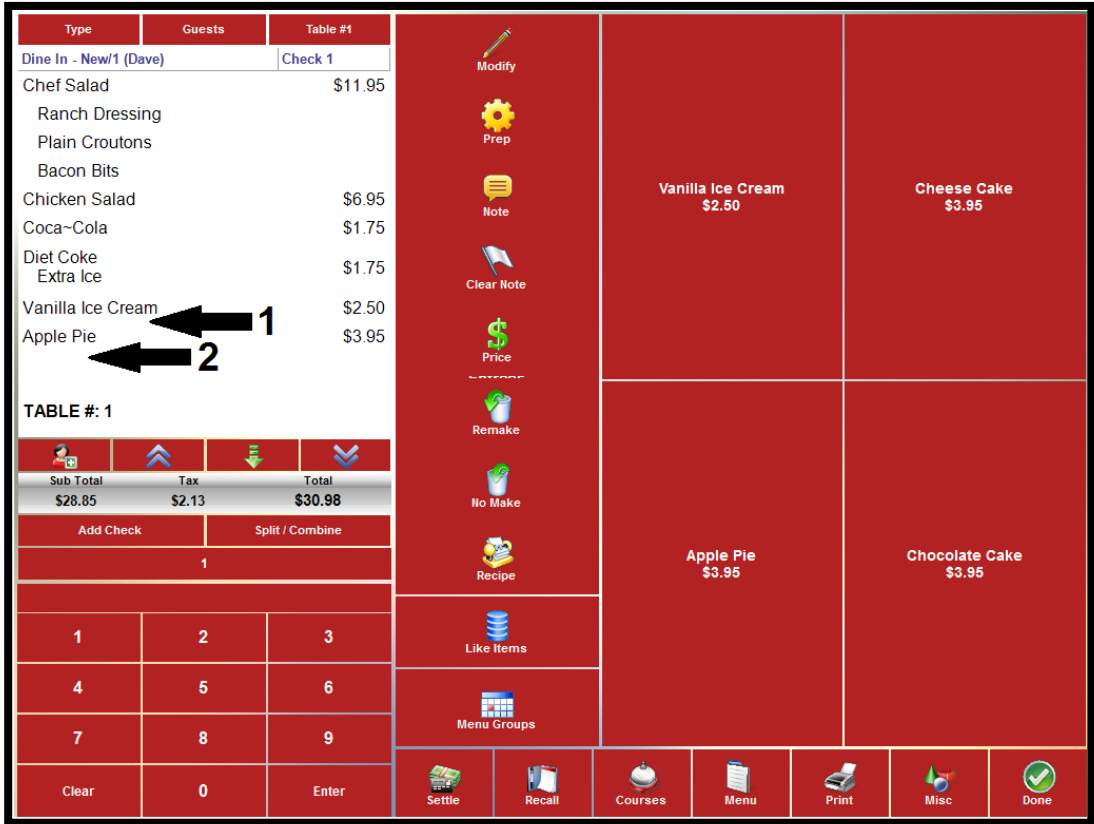


Figure 7-93

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 7-94).

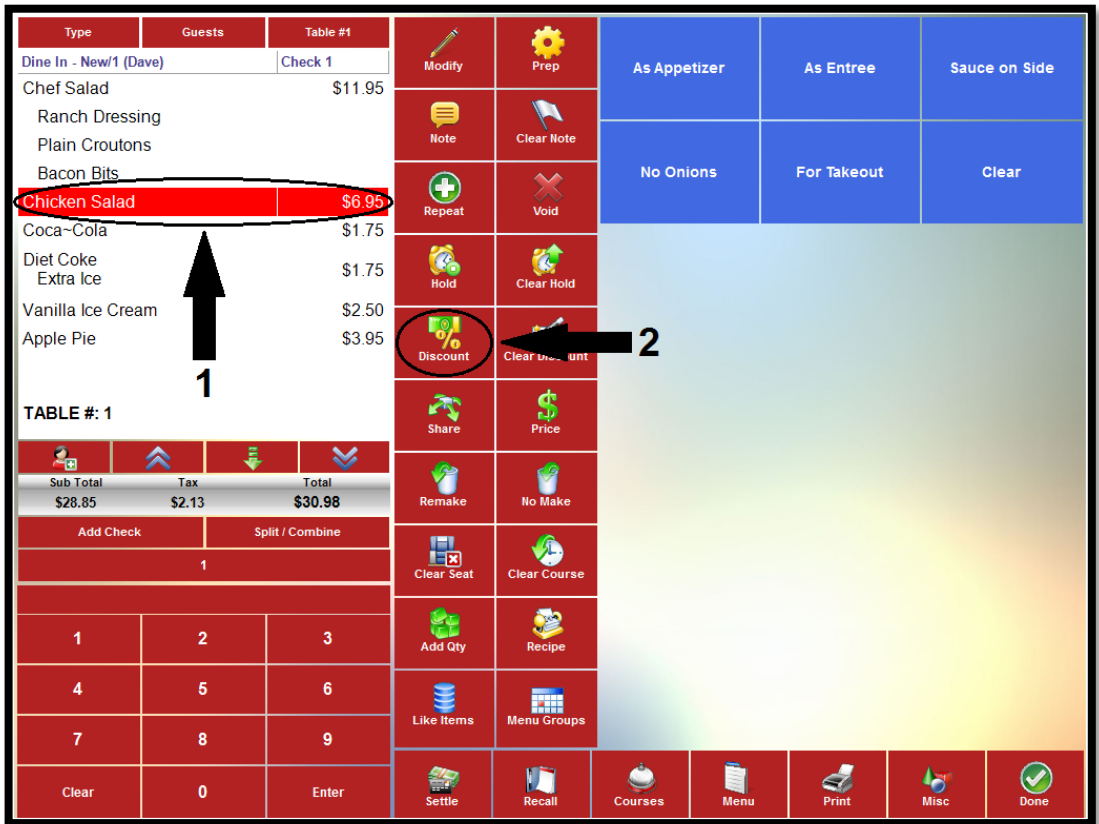
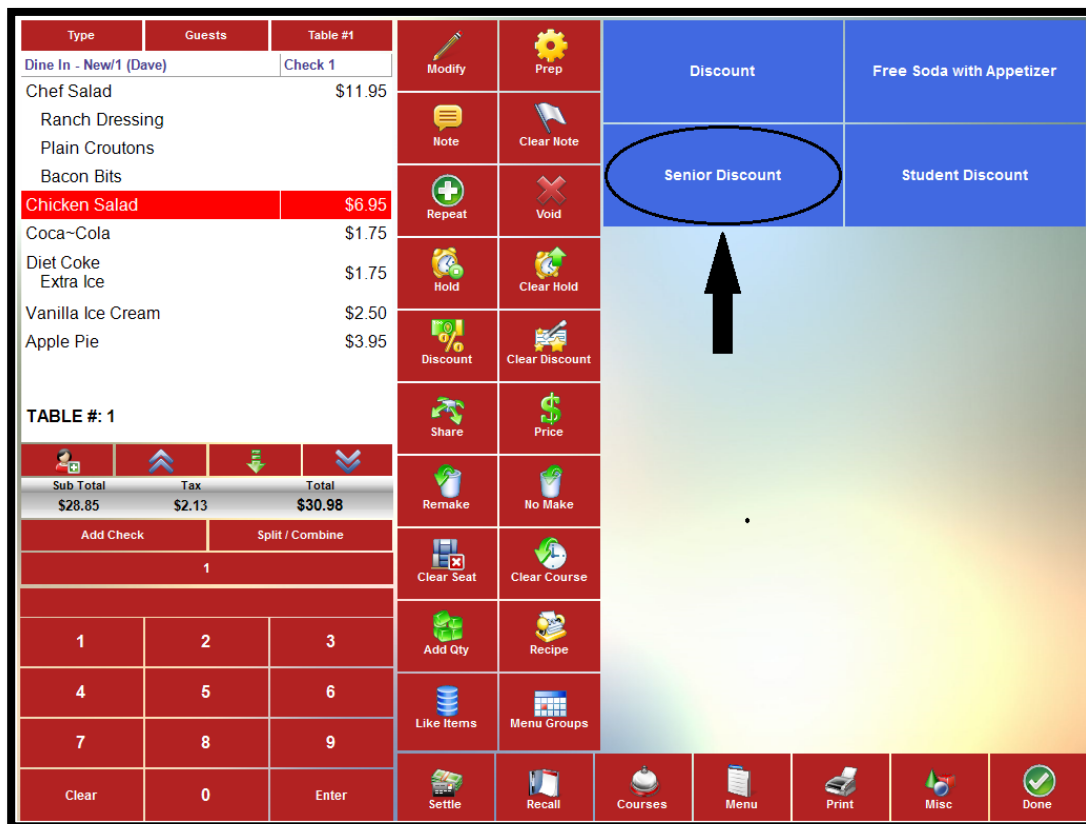


Figure 7-94

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 7-95).



**Figure 7-95**

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 amount type, then simply clicking the fixed amount type discount button automatically applies the fixed discount to the guest check.



### **Open Amount Type Discount**

If the selected discount is of the open amount type, then a virtual numeric keypad appears at the bottom of the guest check after the open amount discount type button is clicked. Enter the monetary amount of the discount through this 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**

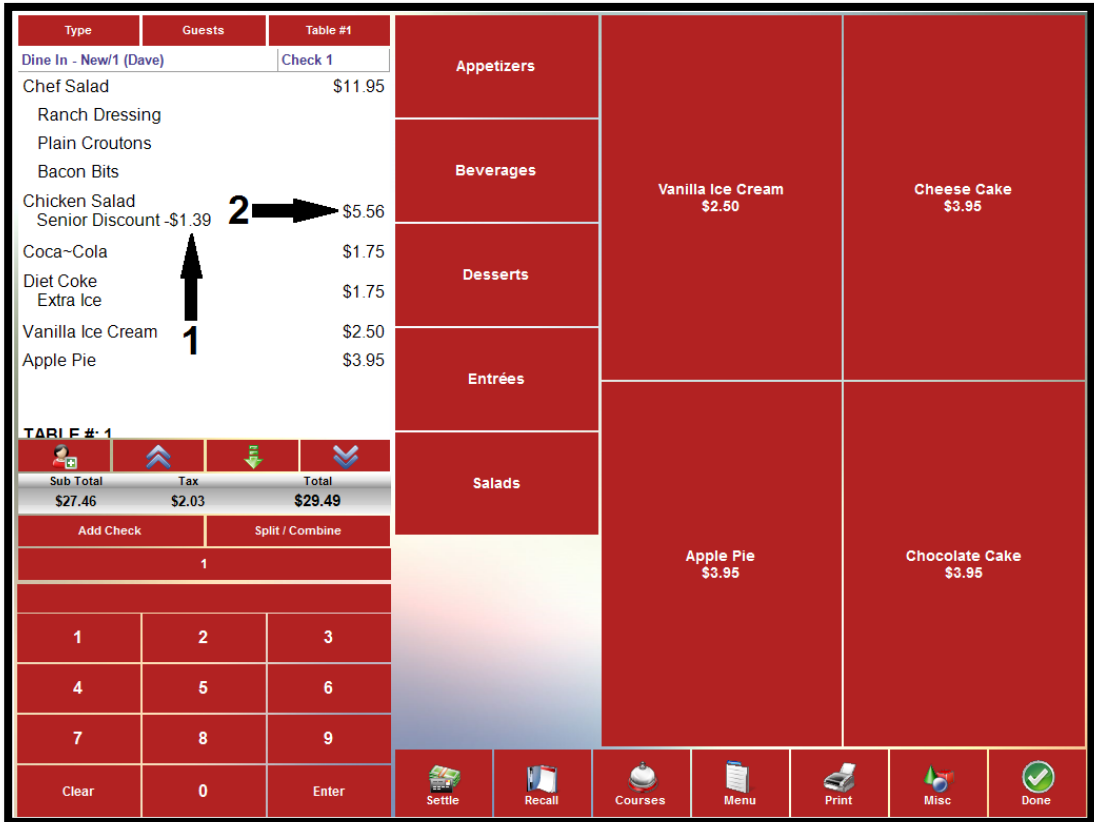
If the selected discount is of the percentage type, then simply clicking the percentage type discount button automatically discounts the selected menu item by the predetermined percentage.

### **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, the user selects 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 steps above, 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 on the right side of the virtual guest check (See Figure 7-96).



**Figure 7-96**

### Clear Discount

To remove a previously applied discount from one or more of the menu items, click on the discounted item or items in the virtual guest check to select them and then click the “Clear Discount” button. (See Figure 7-97).



Figure 7-97

The discounts are immediately removed from the menu items displayed on the virtual guest check and the prices of the items are adjusted to reflect the removed discounts (See Figure 7-98).

| Type                   | Guests | Table #1 |
|------------------------|--------|----------|
| Dine In - New/1 (Dave) |        | Check 1  |
| Chef Salad \$11.95     |        |          |
| Ranch Dressing         |        |          |
| Plain Croutons         |        |          |
| Bacon Bits             |        |          |
| Chicken Salad          |        | \$6.95   |
| Coca-Cola              |        | \$1.75   |
| Diet Coke              |        | \$1.75   |
| Extra Ice              |        |          |
| Vanilla Ice Cream      |        | \$2.50   |
| Apple Pie              |        | \$3.95   |

| TABLE #: 1 |                 |         |
|------------|-----------------|---------|
| Sub Total  | Tax             | Total   |
| \$28.85    | \$2.13          | \$30.98 |
| Add Check  | Split / Combine |         |
| 1          |                 |         |
| 1          | 2               | 3       |
| 4          | 5               | 6       |
| 7          | 8               | 9       |
| Clear      | 0               | Enter   |

| Appetizers | Beverages                | Desserts           | Entrées          | Salads                |
|------------|--------------------------|--------------------|------------------|-----------------------|
|            | Vanilla Ice Cream \$2.50 | Cheese Cake \$3.95 |                  |                       |
|            |                          |                    | Apple Pie \$3.95 | Chocolate Cake \$3.95 |

| Settle | Recall | Courses | Menu | Print | Misc | Done |
|--------|--------|---------|------|-------|------|------|
|--------|--------|---------|------|-------|------|------|

Figure 7-98

## 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.

### 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 this 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 their 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 into 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 preparation instructions (See Figure 7-99).



OK



**Ingredients:**  
1 tablespoon unsalted butter, ½ medium onion (finely chopped), ½ medium red bell pepper (finely chopped), 1½ teaspoons kosher salt + 2 pinches, 2 cups long-grain white rice, 1 pinch saffron steeped in ¼ cup hot water, 2½ cups chicken broth, 1 - 1" x 2" strip of orange zest, 2 bay leaves, ½ cup peas (fresh or frozen), ¼ cup golden raisins, ¼ cup pistachios (chopped).

**Preheat oven to 350°. Melt butter in 3-quart saucier. Stir in onion, bell pepper, and 2 pinches of salt. Decrease heat to low. Sweat onion until translucent but not brown. Increase heat to medium and add rice. Cook, stirring frequently (3 to 4 minutes). Add saffron and its water, broth, orange zest, bay leaves, and the remaining 1½ teaspoons salt. Increase heat and bring to a boil. Next, thoroughly wet a clean towel, turn off the heat, scatter peas over the rice, then place the towel across the top of the saucier. Top with lid, then fold towel corners up over the lid. Transfer saucier (towel and all) to oven and bake for 15 minutes. Remove from oven and rest at room temperature for 15 more minutes without opening the lid. Remove the orange zest and bay leaves. Fluff with fork. Server garnished with raisins and pistachios. Yields six servings.**

Recipe Overview: Rice Pilaf

**Figure 7-99**

If the recipe text exceeds the space limitations of the screen, click the text with your mouse and then hover your cursor over the recipe text to display a textbox with the full recipe text. On a touch screen computer, simply touching the recipe text on the screen performs the same action. When finished viewing the recipe, click the “OK” button to return to the previous screen. 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 button on the right side of the screen. The order command is 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 the “Misc” button from the order entry screen. The buttons for the miscellaneous features appear in the three rightmost columns (See Figure 7-100).

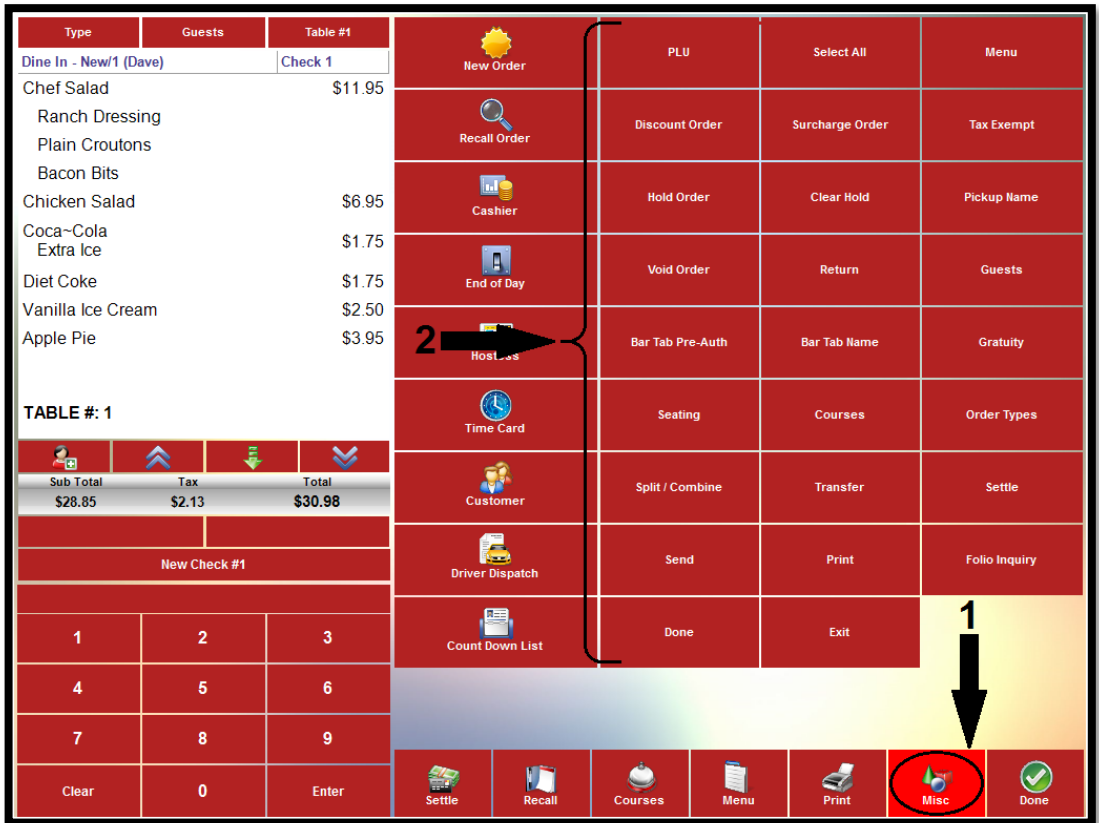


Figure 7-100

### PLU

The **Price Lookup (PLU)** feature allows the user to find a specific menu item by entering one of three pieces of information: the Stock Keeping Unit (SKU) code, the Universal Product Code (UPC), or the item name. Click the “Misc” button from the order entry screen to access the additional miscellaneous features screen, and then click the “PLU” button (See Figure 7-101).

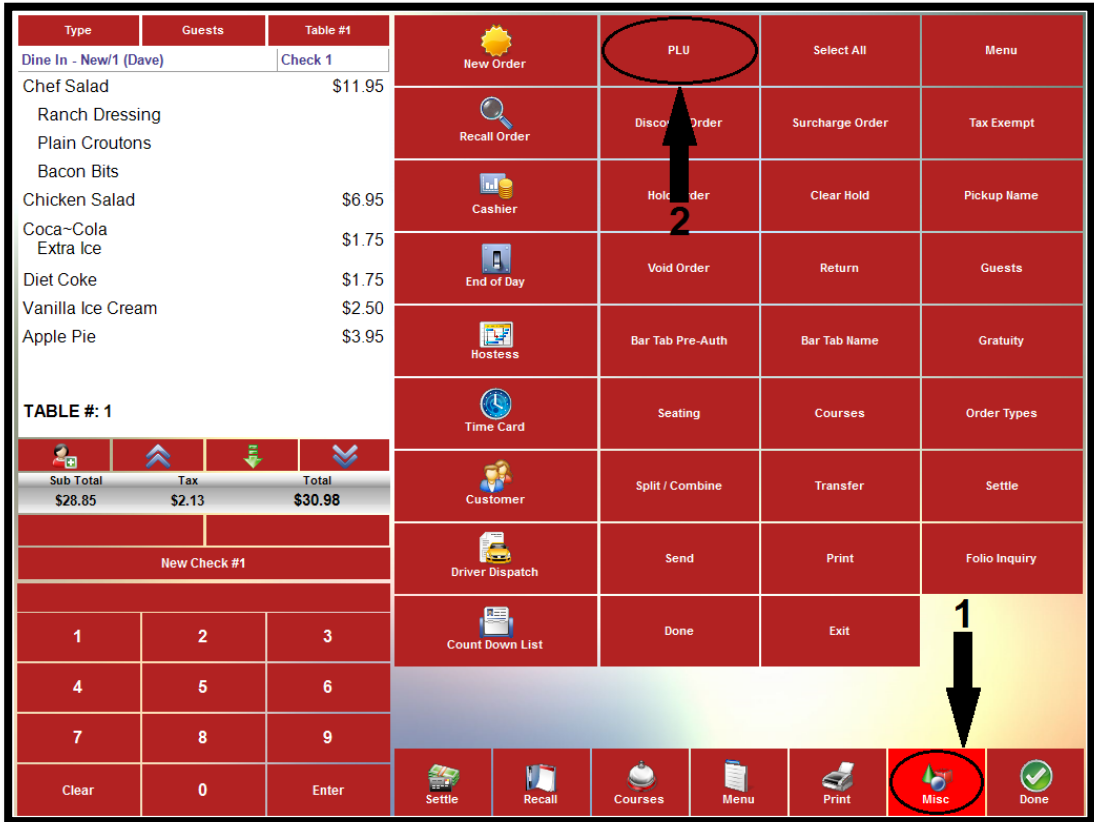


Figure 7-101

The PLU screen displays. The default search method is Lookup By Item Name, as displayed on the face of the lookup method button at the upper left portion of the screen (See Figure 7-102).

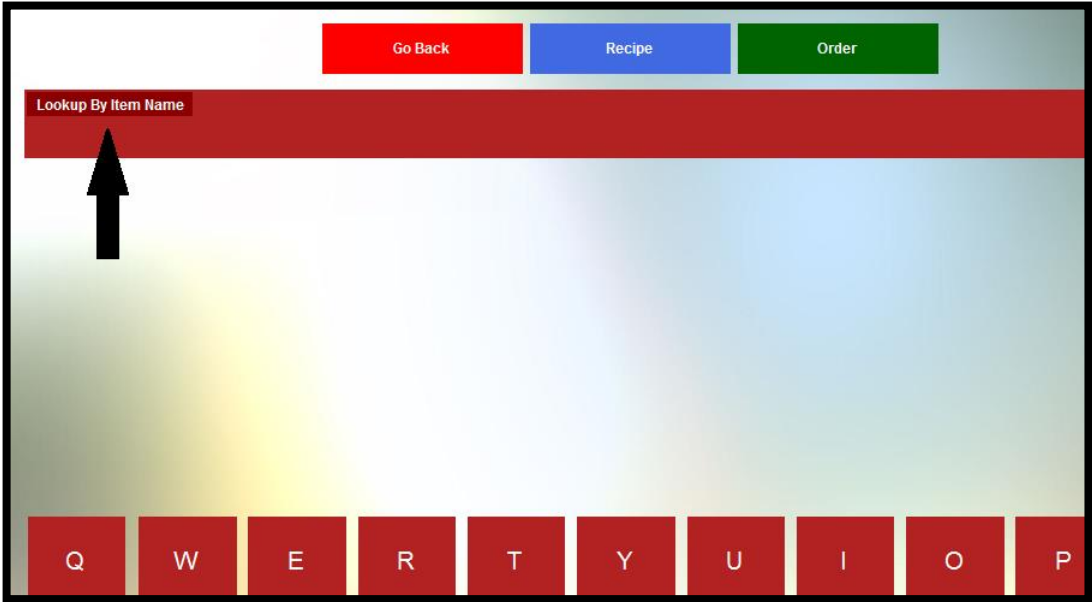


Figure 7-102

### 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 keyboard at the bottom of the screen. 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 near the top of the screen. It is not necessary to enter the name from the beginning, as the search returns a list of all items that contain the entered character string, even if they do not appear at the beginning of the item name. As each additional character is entered, the list is filtered further, reducing the number of menu items that contain the string of characters entered thus far. As soon as your desired menu item appears in the grid, 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 7-103).

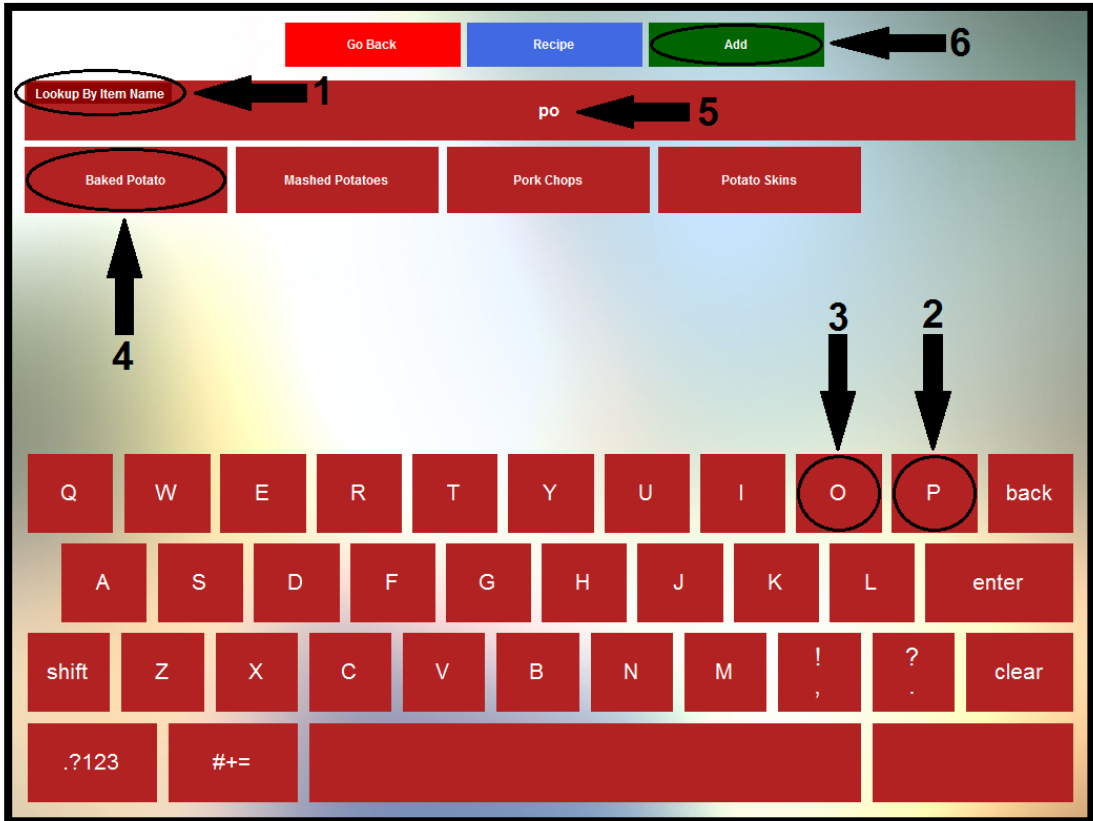


Figure 7-103

### **Recipe**

After selecting the menu item from the grid near the top 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 (Stock Keeping Unit) code, click the lookup method button repeatedly until the caption on the button reads Lookup By SKU. Next, enter the SKU code by using the virtual keypad at the bottom of the screen. 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 SKU codes contain the character string entered thus far appears in the grid near the top of the screen. It is not necessary to enter the SKU code from the beginning, as the search returns a list of all items that contain the entered character string, even if they do not appear at the beginning of the item SKU code. 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 grid, 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 7-104).

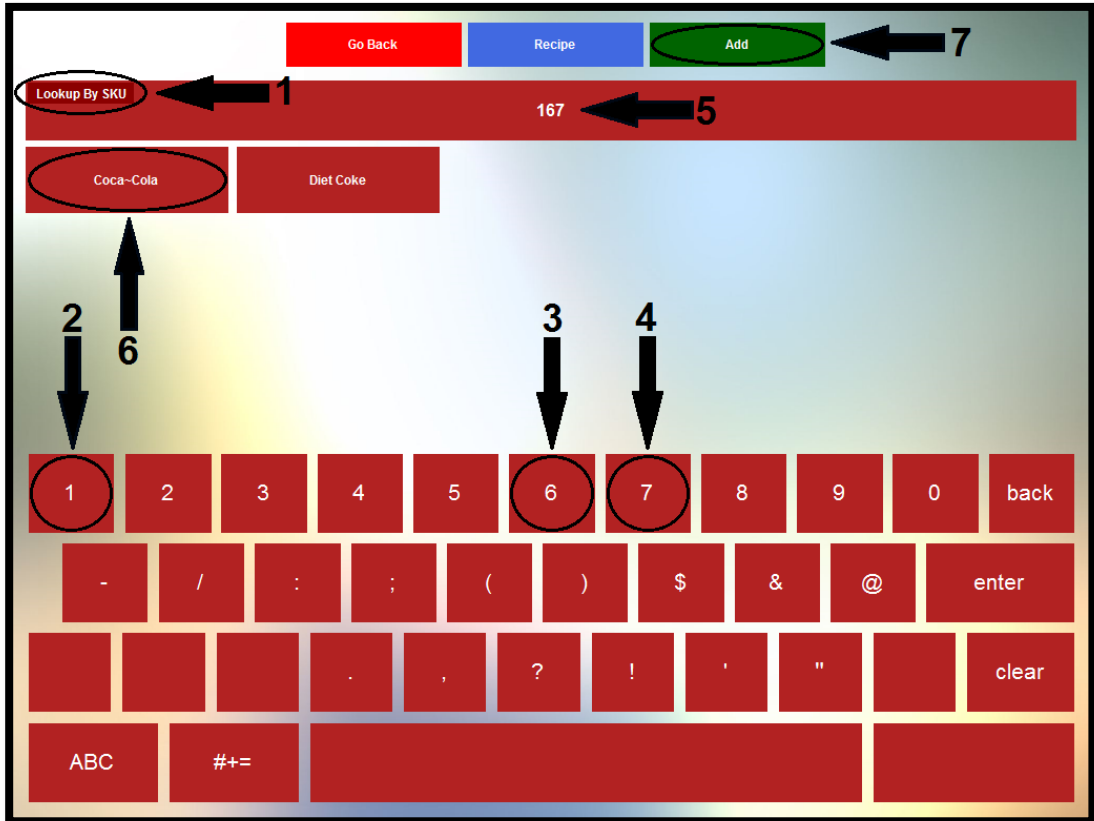


Figure 7-104

### **Recipe**

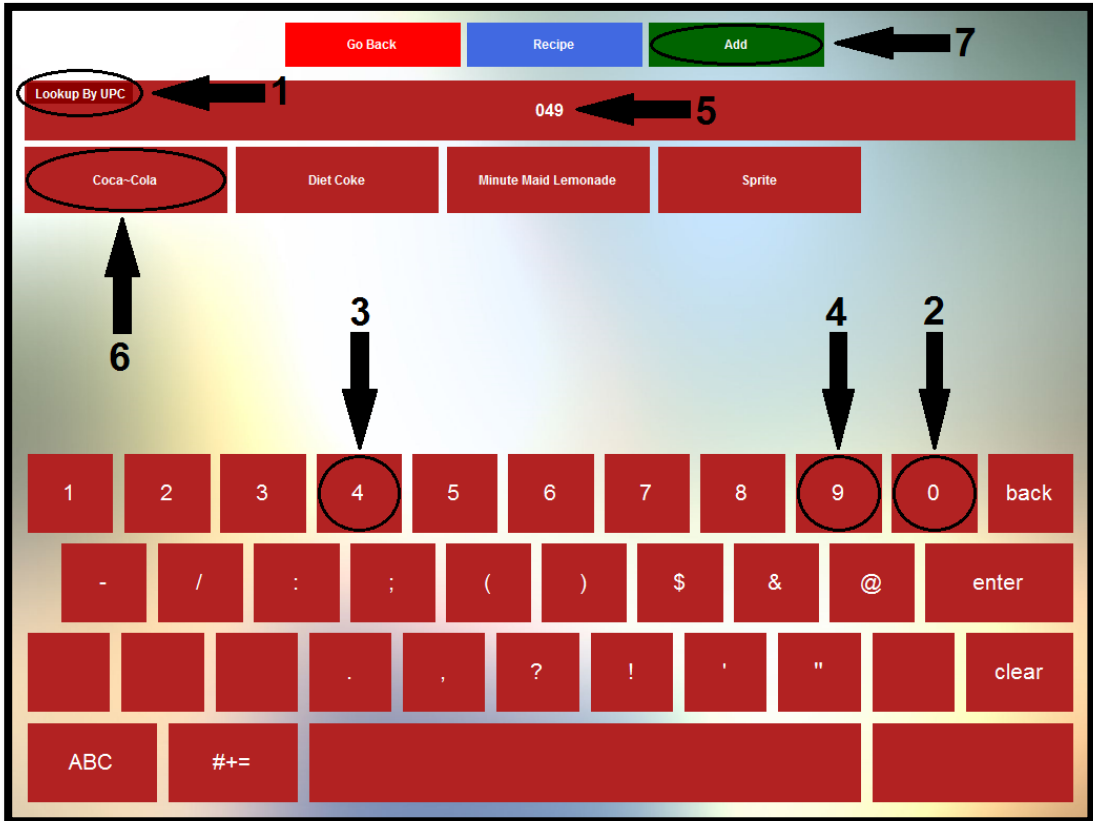
After selecting the menu item from the grid near the top of the screen, click the “Recipe” button to view the recipe information that was entered for the menu item in the XERA® POS Manager application. Please note that if the optional recipe information has not been entered for the menu item, then nothing 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 (Universal Product Code), click the lookup method button repeatedly until the caption on the button reads **Lookup By UPC**. Next, enter the UPC by using the virtual keypad at the bottom of the screen. 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 UPCs contain the numeric character string entered thus far appears in the grid near the top 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 that was 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. 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 7-105).



**Figure 7-105**



### **Recipe**

After selecting the menu item from the grid near the top 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 all of them at once. Click the “Misc” button from the order entry screen to access the additional miscellaneous features screen. Next, click the “Select All” button. At this point, the desired action may be performed on the menu items as a group by clicking 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 7-106).



**Figure 7-106**

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.

### **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 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 (See Figure 7-107).

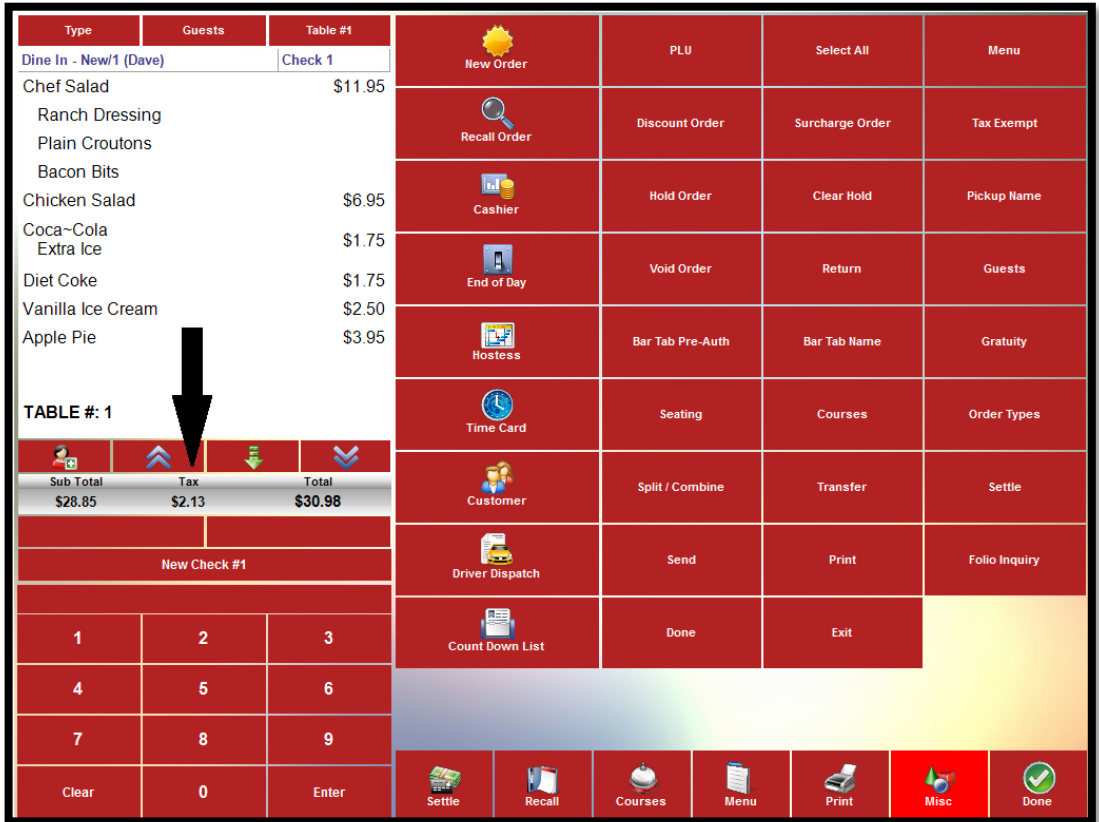
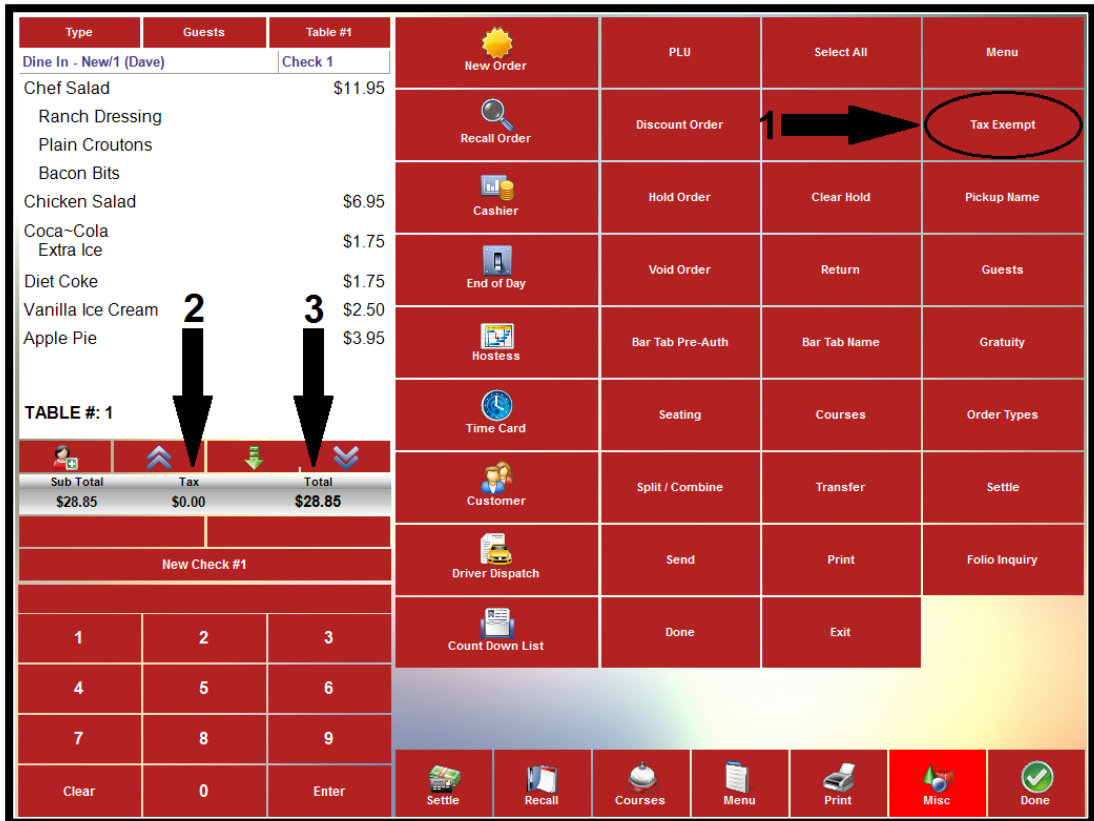


Figure 7-107

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 and the order total is adjusted accordingly (See Figure 7-108).



**Figure 7-108**

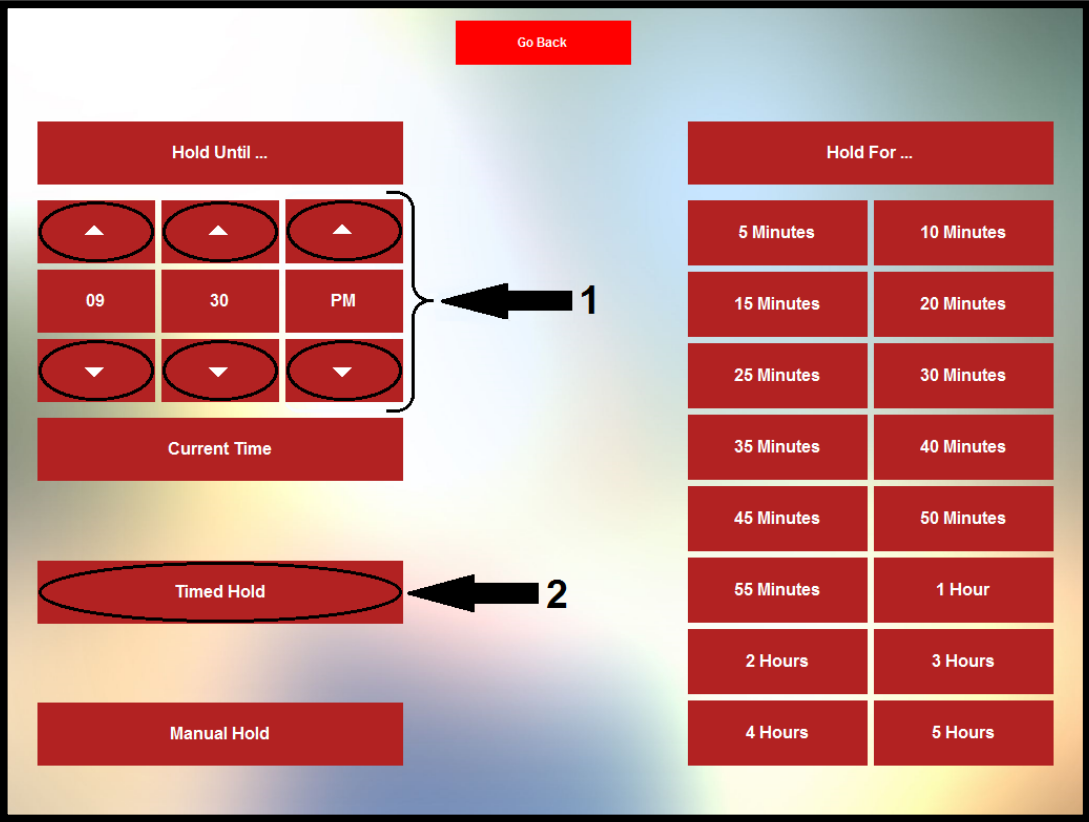
Please note that toggling the “Tax Exempt” button alternately removes and reinstates the tax on the order.

## 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. Next, select the “Misc” 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 and down arrow buttons to change the time of day displayed on the keypad. When the desired time is reached, click the “Timed Hold” button to activate the hold (See Figure 7-109).



**Figure 7-109**

Please note that the desired hold expiration time of day must be 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 7-110).



Figure 7-110

### 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 7-111).



**Figure 7-111**

### Hold Time Display

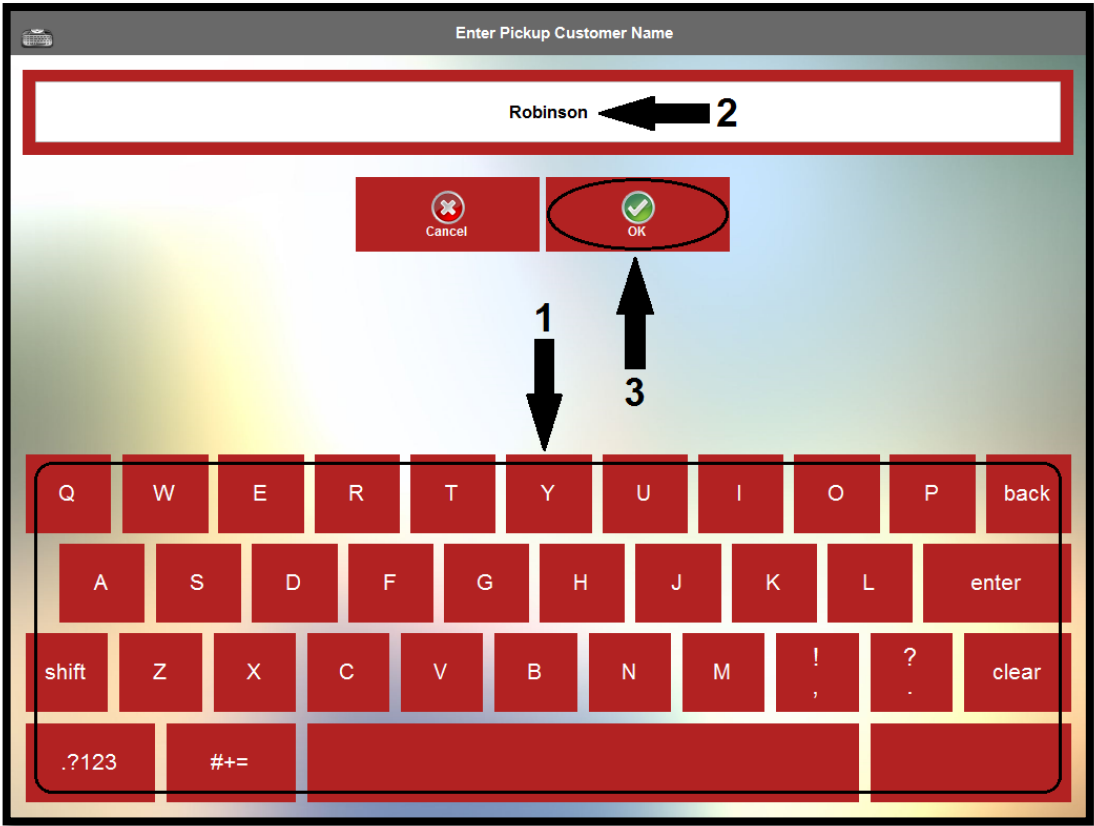
As each type of hold is placed on the order, the display returns to the view of the guest check. The hold is listed directly below each menu item on the guest check. If the hold is for a finite amount of time, the message on the guest check reads ||HOLD UNTIL XX:XX XM||, where XX:XX XM is displayed as 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 panel. Next, select the “Misc” 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.

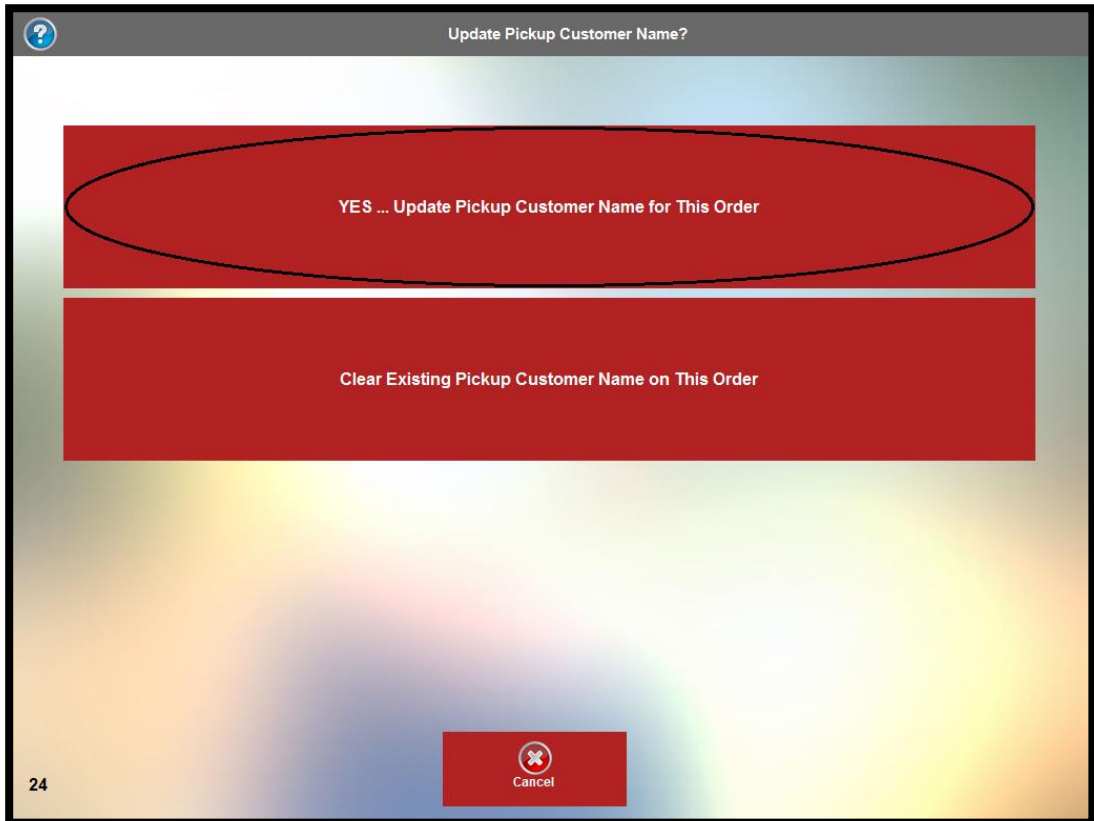
**Pickup Name**

The **Pickup Name** feature allows the user to add a customer name to an existing order. 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 and then click the “Pickup Name” button. Enter the customer name via the virtual keyboard that displays at the bottom of the Enter Pickup Customer Name screen. Click the “OK” button to close the Enter Pickup Customer Name screen and return to the order entry screen (See Figure 7-112).



**Figure 7-112**

To change an existing 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 customer name (See Figure 7-113).

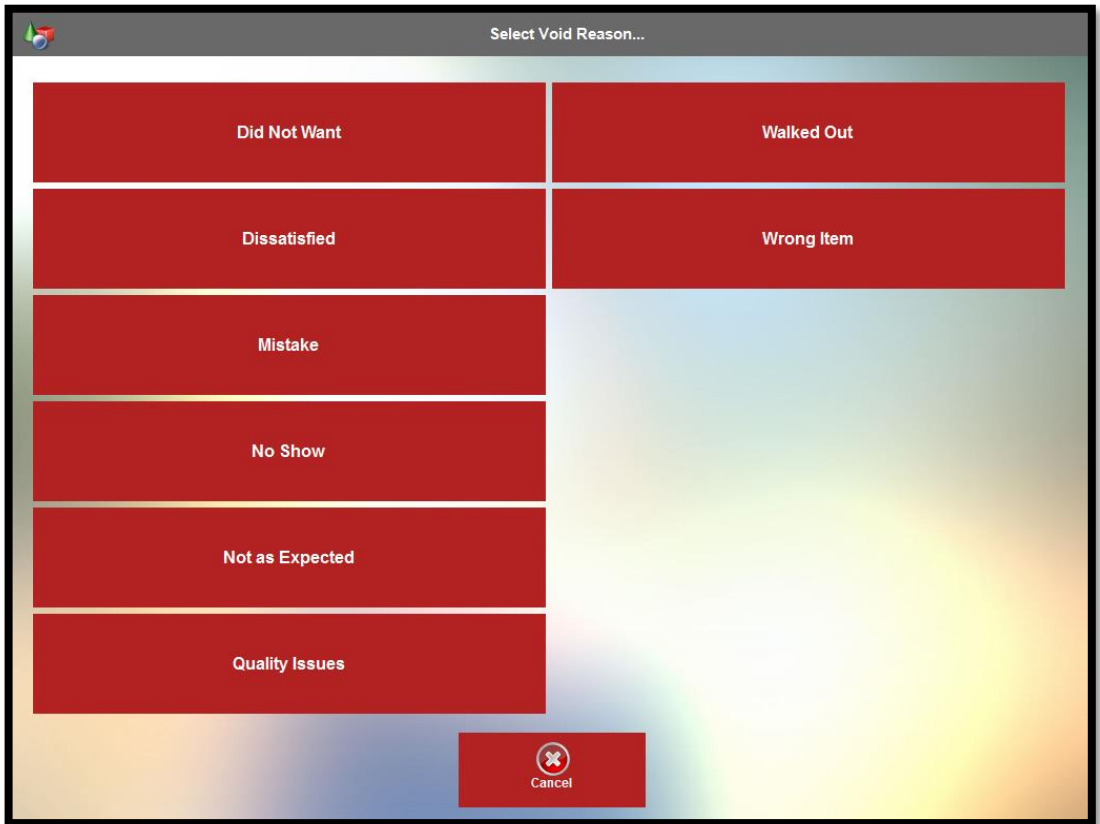


**Figure 7-113**

On the following screen, enter the updated information and then click the “OK” button to return to the order entry screen. Select the “Clear Existing Pickup Customer Name on This Order” button if you wish to delete the customer name entered previously and start over.

## 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 its respective button (See Figure 7-114).

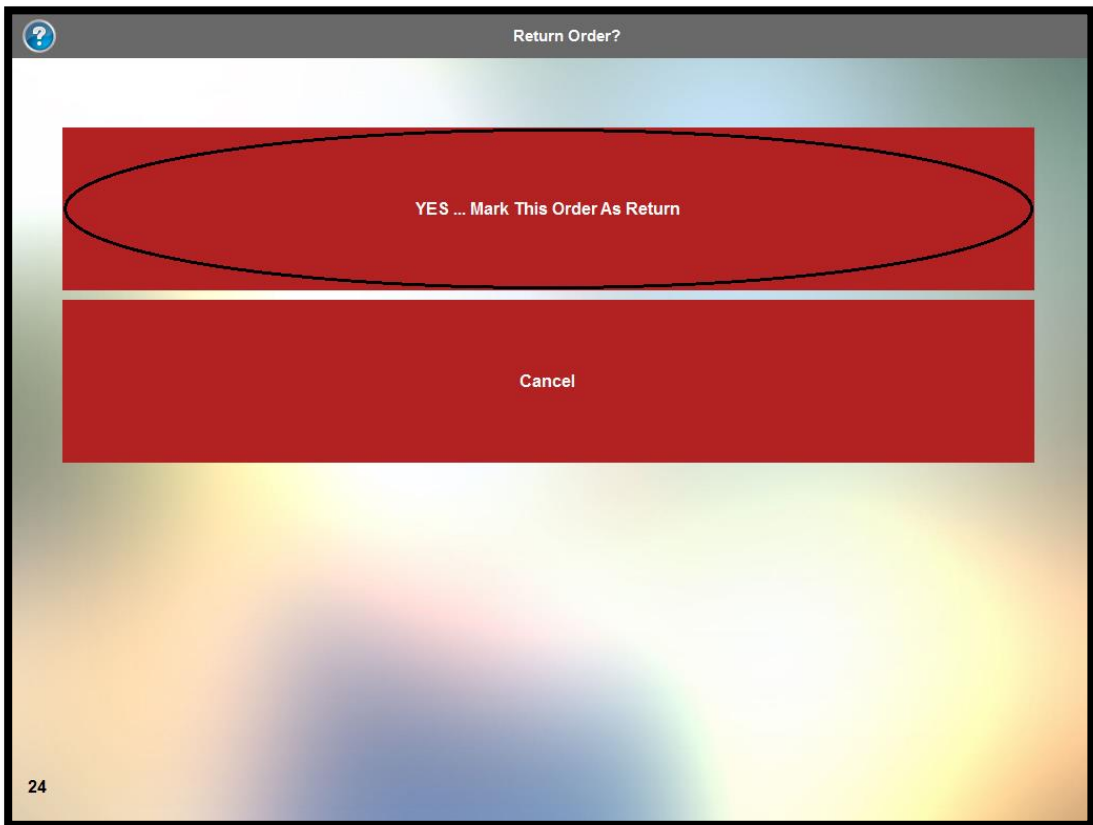


**Figure 7-114**

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 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 into the POS system the items that the customer is returning, just as though the customer was making a purchase. When all of the items that are being returned have been entered, the user then clicks the “Misc” button. Next, the user selects 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 7-115).



**Figure 7-115**

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 customer’s 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 keypad and then select the keypad’s “Enter” button. The number of guests entered appears at the top of the guest check, next to the order number (See Figure 7-116).

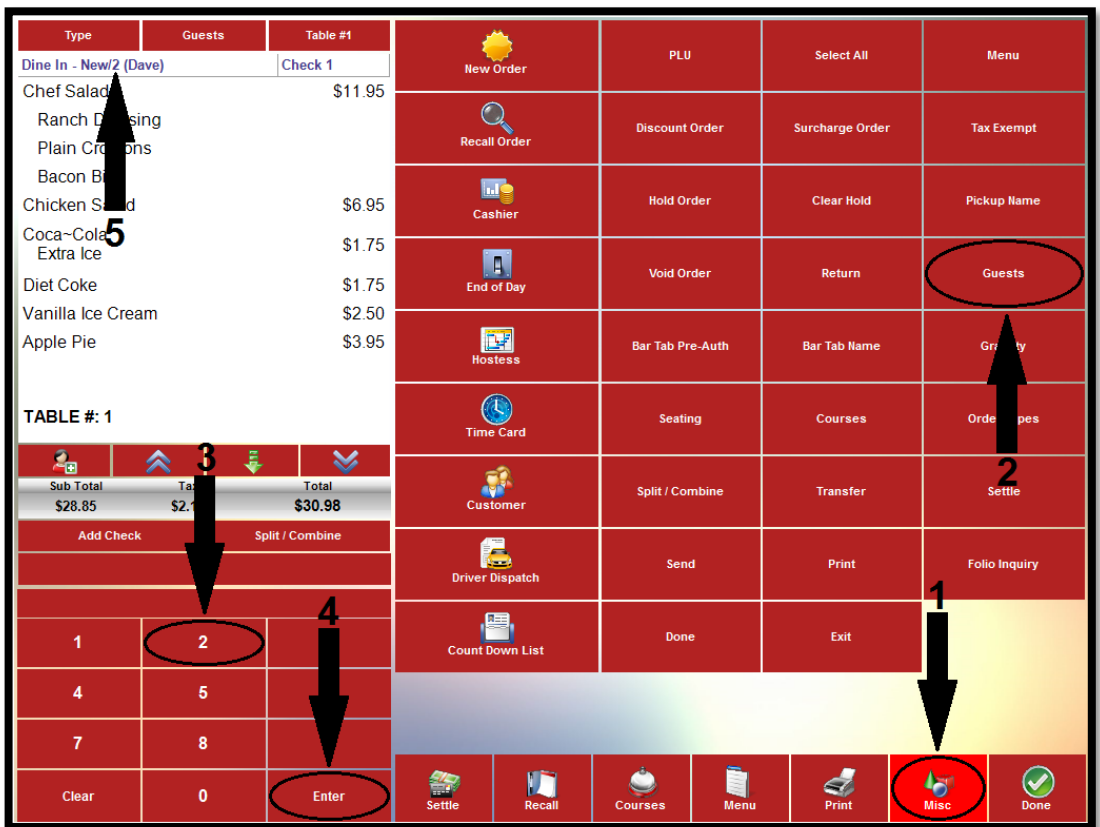


Figure 7-116

## Bar Tab Pre-Auth

The **Bar Tab Pre-Auth** feature allows the user to pre-authorize a bar tab order for a customer. A pre-authorization allows the customer to continue charging additional drinks to his credit card account up to the pre-authorized amount. If the customer goes over the pre-authorization limit, the credit card account may be pre-authorized again for a higher amount.

From the Order Entry screen, click the “Misc” button to display the additional features on the right side of the screen. Next, click the “Bar Tab Pre-Auth” button. The pre-authorization window displays. Swipe the customer’s credit card through the MSR (Magnetic Stripe Reader) device and then click the “Process” button (See Figure 7-117).

The screenshot displays the Bar Tab Pre-Auth interface. At the top, there are two buttons: "Go Back" (red) and "Process" (green). Below these is a form for entering payment card information. The form is divided into several sections:

- Payment Card Account Number:** A green header with a red field containing "Visa: XXXX-XXXX-XXXX-XXXX".
- Cardholder Name:** Two red fields for "Cardholder First Name" and "Cardholder Last Name".
- Expiration Date:** Two red fields for "Expire Month" and "Expire Year", each with up and down arrow buttons.
- CVV Presence:** A red field for "CVV Presence" with an up and down arrow button.
- Address:** Two red fields for "AVS Address" and "AVS Zip Code".
- Verification Codes:** Two red fields for "Card Verification Code" and "Voice Authorization Code".

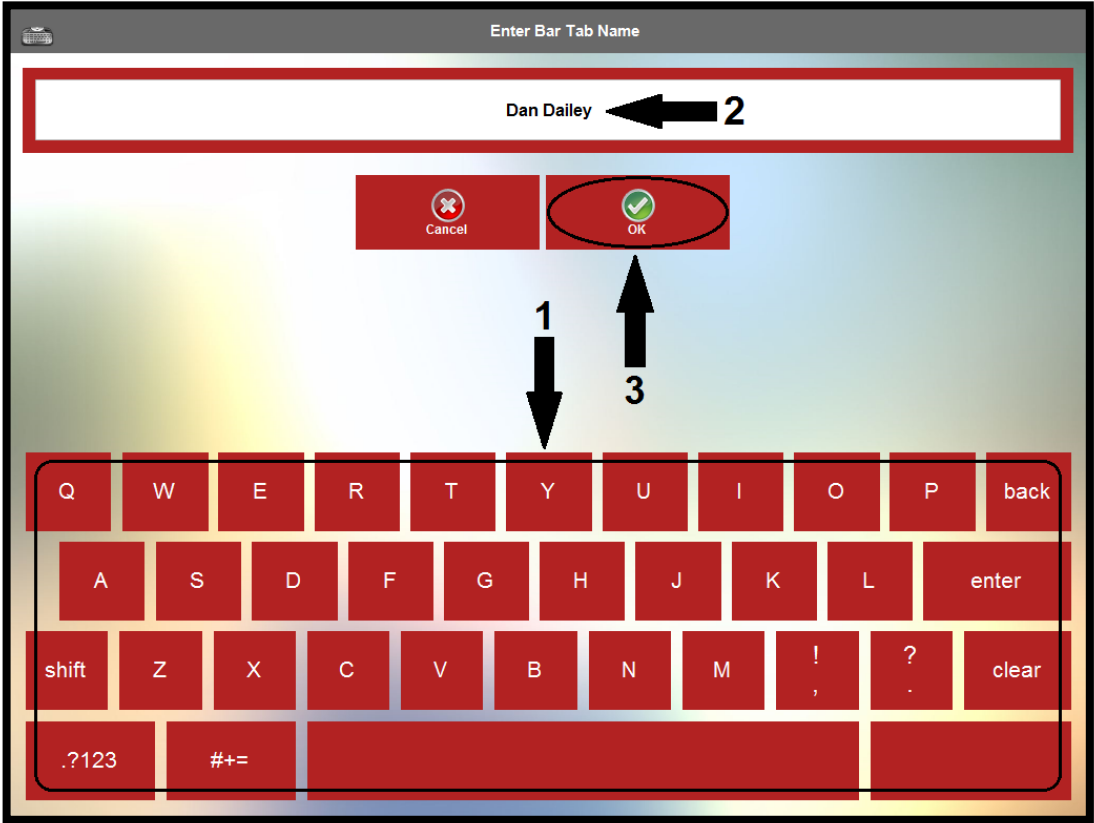
Below the form is a numeric keypad with red buttons for digits 1-0, a "back" button, and symbols like "-", "/", ":", ";", "(", ")", "\$", "&@", "enter". A second row of symbols includes ".", ",", "?", "!", "'", "\"", and a "clear" button. The bottom row includes "ABC", "#+=", and a large empty red field.

**Figure 7-117**



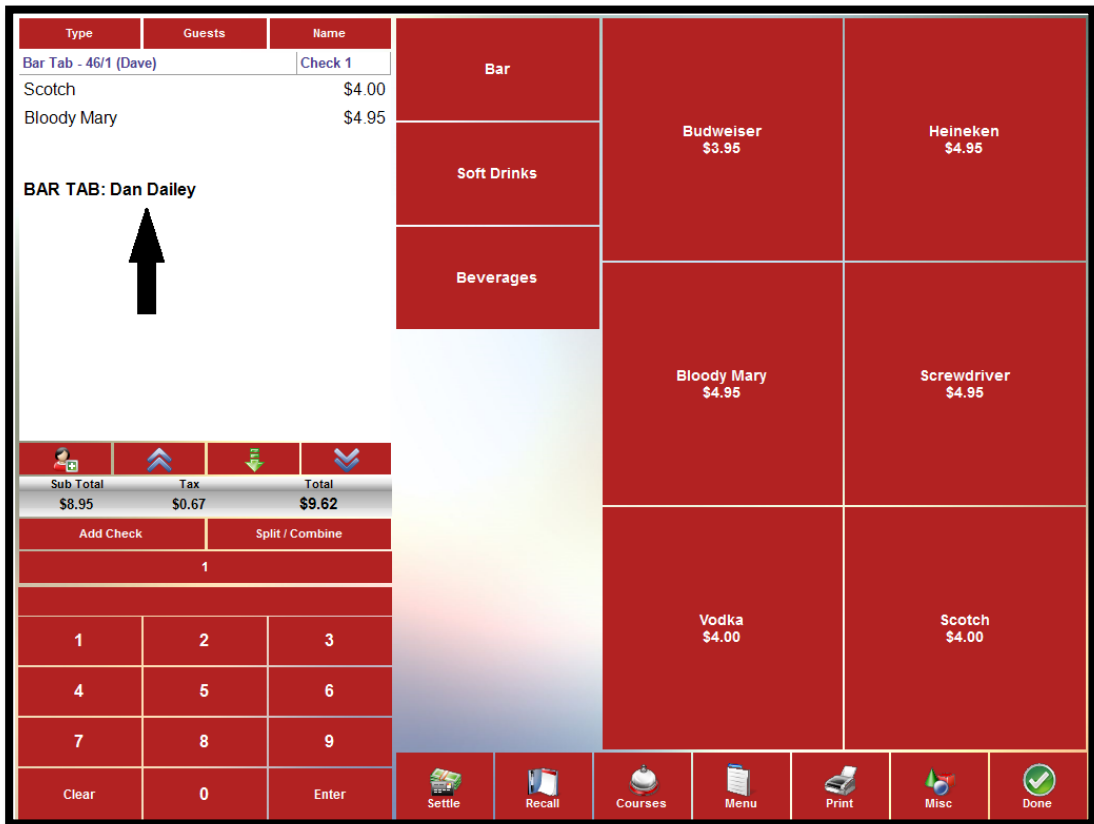
**Bar Tab Name**

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 to display the additional features on the right side of the screen. Next, 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 7-118).



**Figure 7-118**

The display returns to the order entry screen and the name entered automatically appears at the bottom of the virtual guest check (See Figure 7-119).



**Figure 7-119**

## 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 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 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.

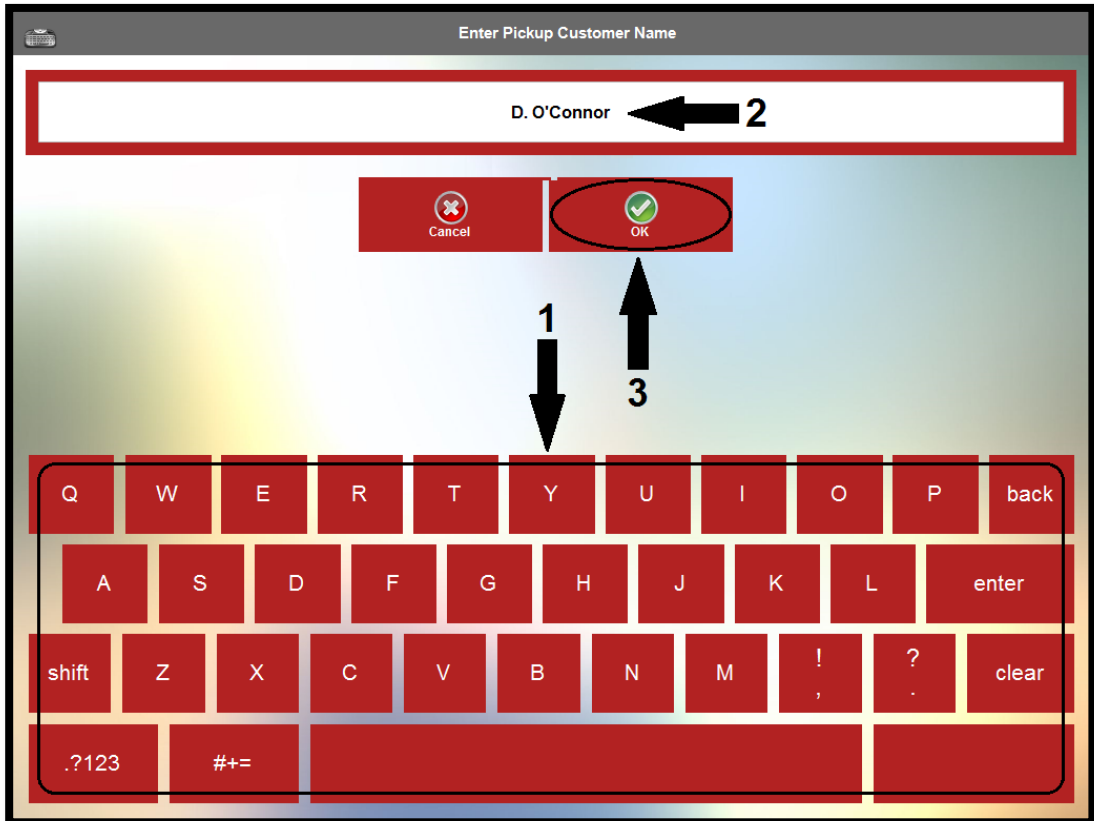
### **Open Amount Type Gratuity**

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 entered or edited in the XERA® POS Manager application by navigating to **Company Tab > Operations > Order Types**, clicking on the List tab, and then selecting the desired order type. Next, click the "New" or "Edit" button at the bottom of the window and then click the Settings tab.

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 to add the customer name to the smart check (See Figure 7-120).



**Figure 7-120**

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. In this case, follow the instructions on using the **Hostess** features on page 100 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 39 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 a specific order type from this screen, click its respective button. The selected order type replaces any previously selected order type (See Figure 7-121).

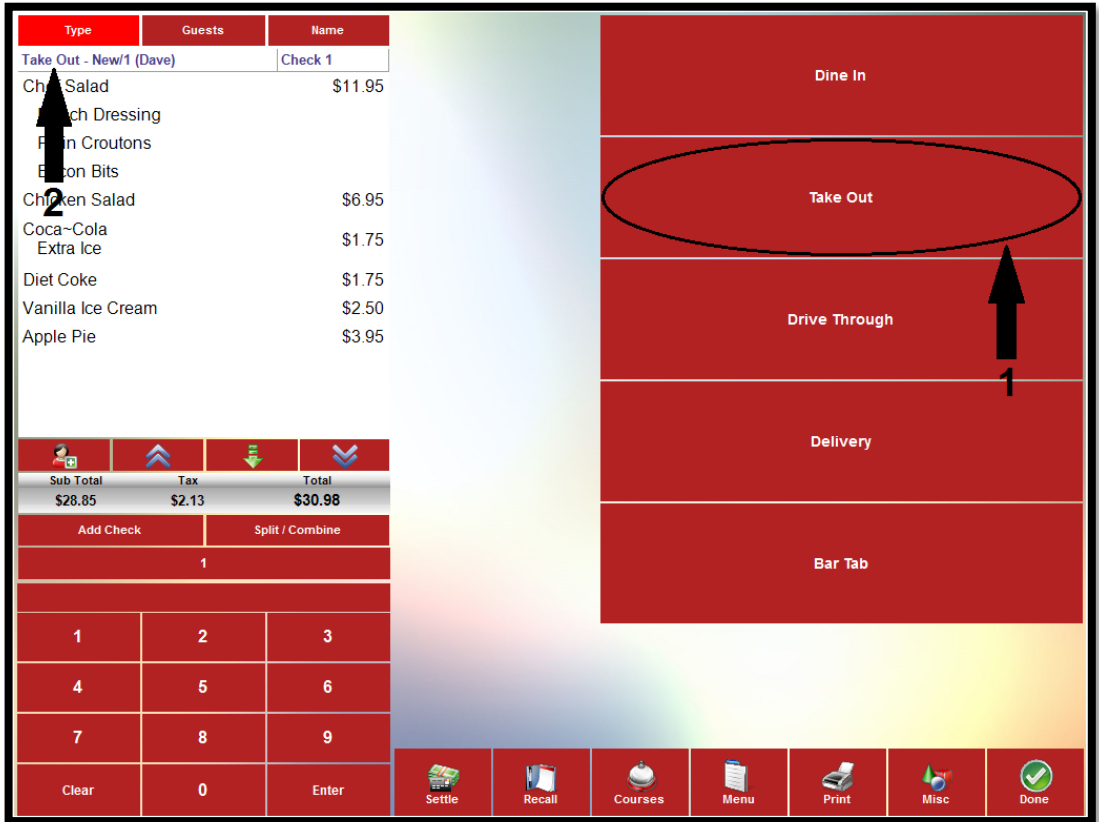


Figure 7-121

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 at the bottom of the smart check window to create the first guest (see Figure 7-122).

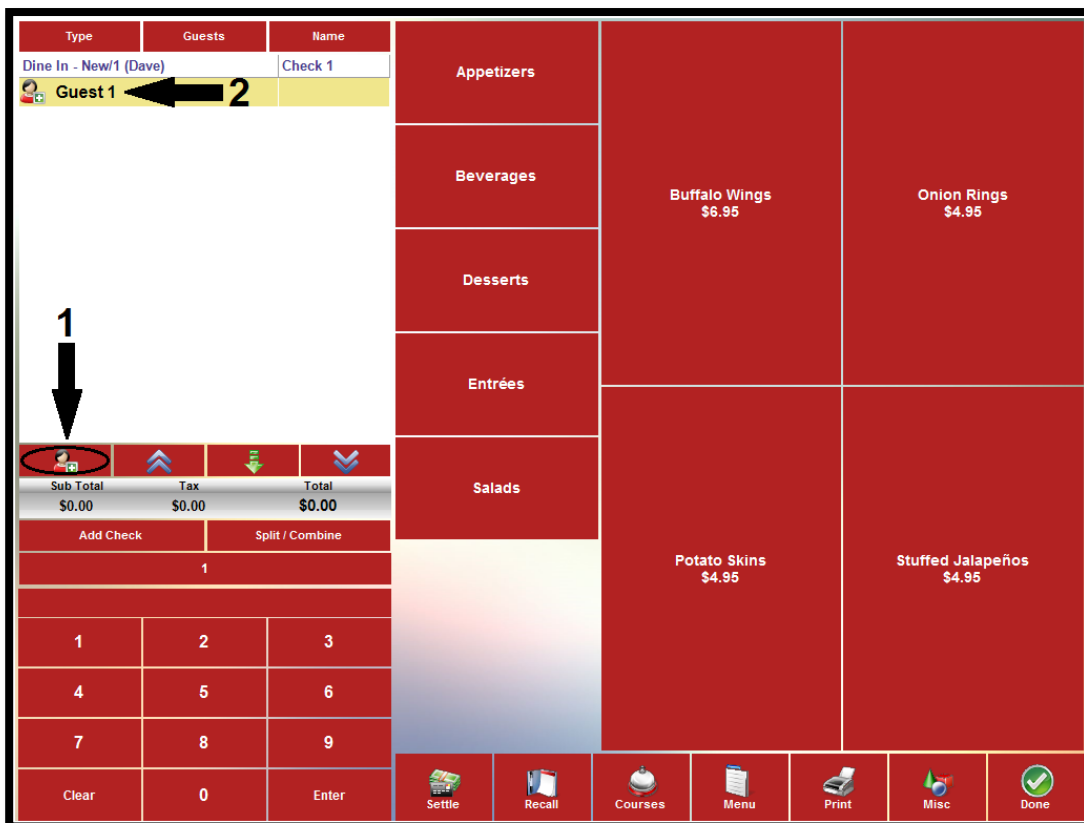


Figure 7-122

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 7-123).



**Figure 7-123**



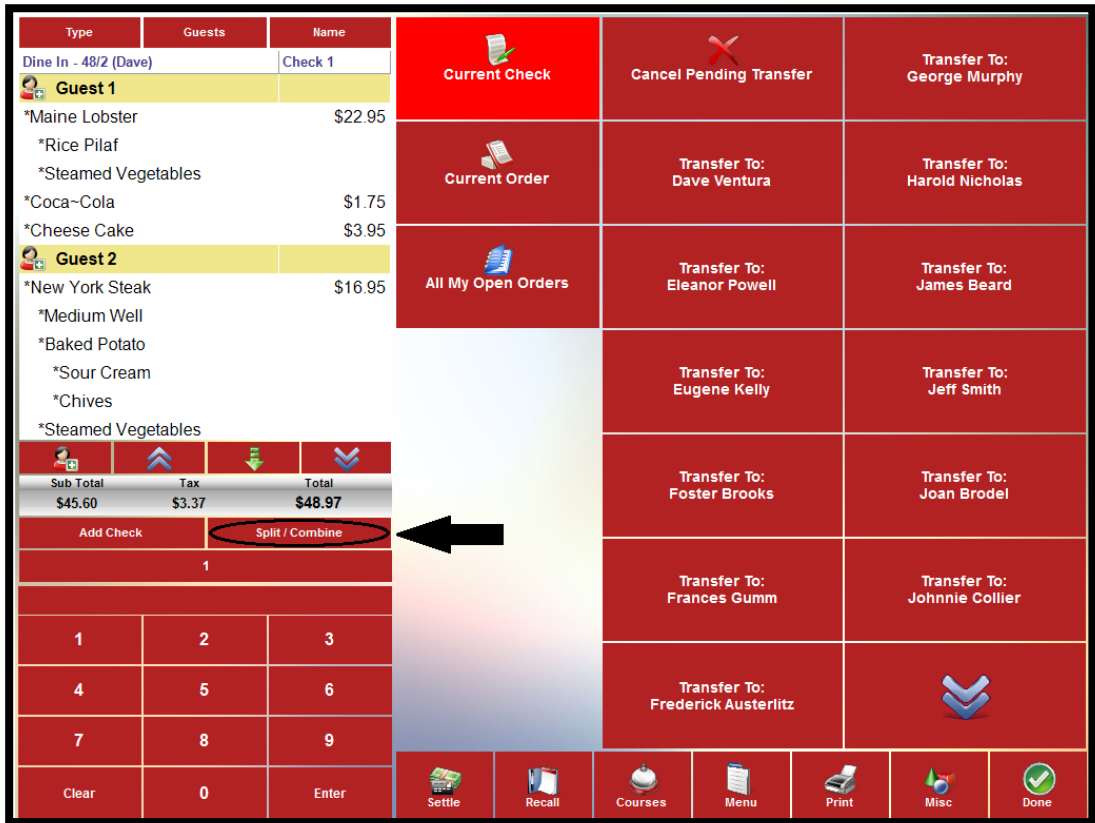


### **Transfer**

A member of the wait staff uses the **Transfer** feature to transfer one or more of his open orders to another member of the wait staff, usually because his shift is ending. Click the “Transfer” button to access the features that allow the transfer of guest checks from one employee to another.

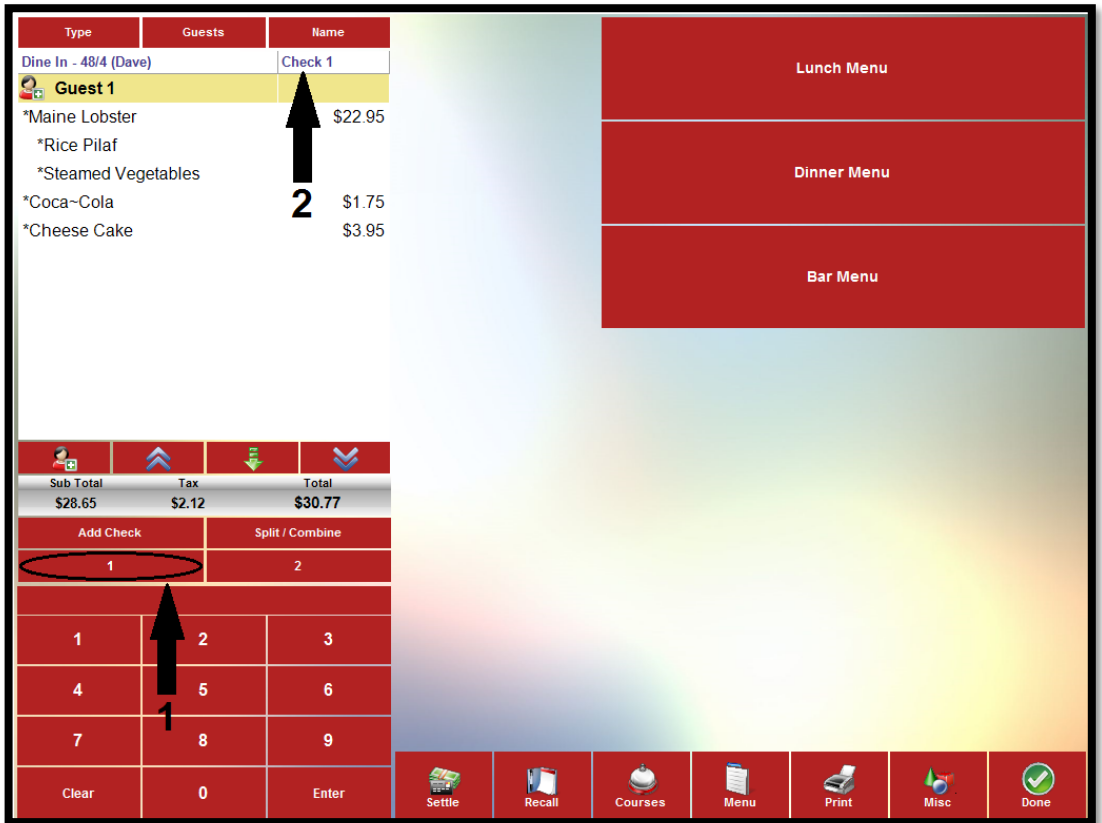
**Current Check**

The “Current Check” button is used to transfer a single check (from an order that is comprised of multiple checks) to another employee. 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 near the top of the virtual numeric keypad to split the order into multiple checks (See Figure 7-125).



**Figure 7-125**

Once the checks are split, a series of buttons appears near the top of the virtual keypad; one button for each check. Select the desired check by clicking its button to display it alone in the smart check panel (See Figure 7-126).



**Figure 7-126**

Next, click the “Misc” button and the “Transfer” button to display the Transfer screen. On the following screen, click the “Current Check” button and the “Transfer To:” button that corresponds with the employee to whom you wish to transfer the order (See Figure 7-127).

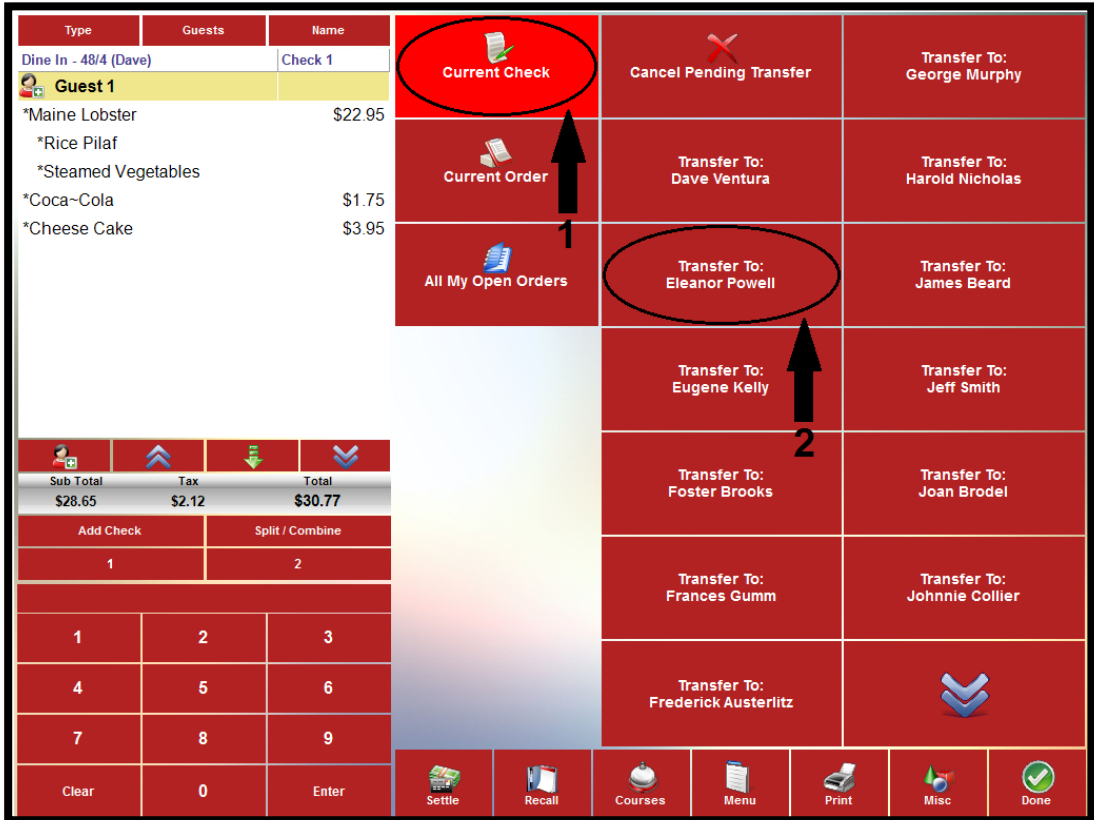


Figure 7-127

The transfer is now partially complete. Recalling the order above shows that the transfer is now pending acceptance by the transferee (See Figure 7-128).

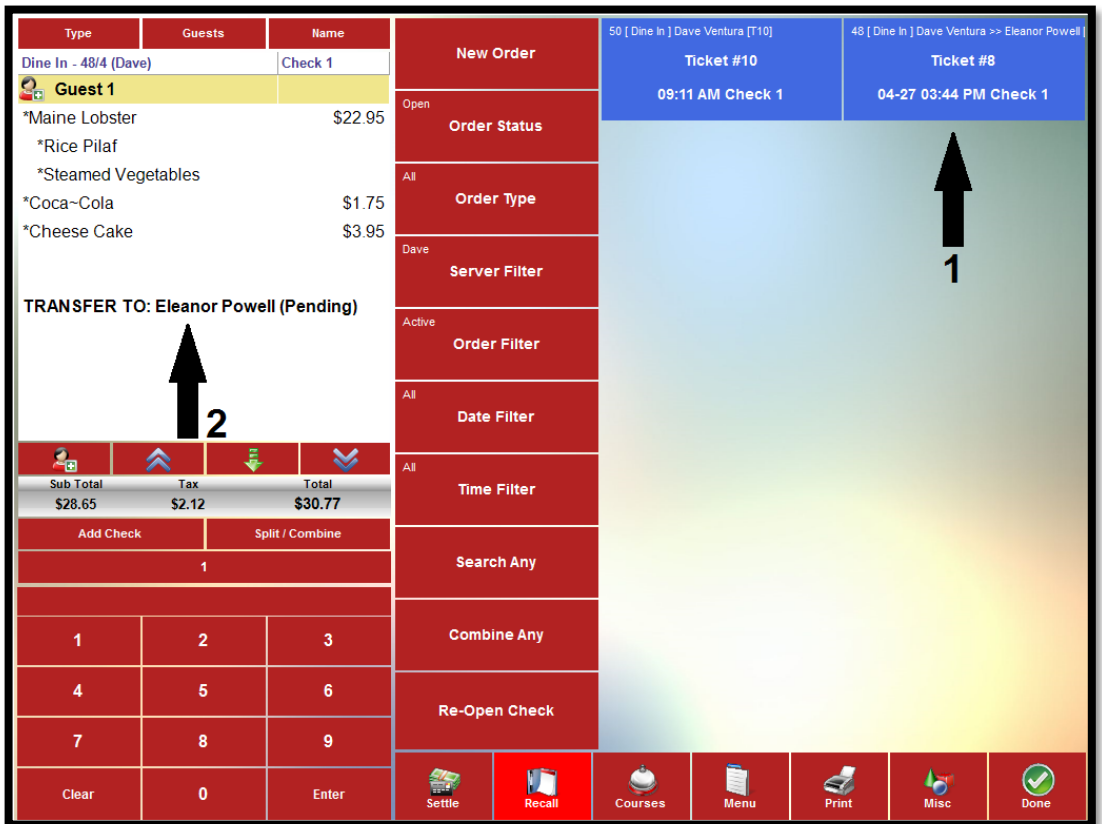


Figure 7-128

**Current Order**

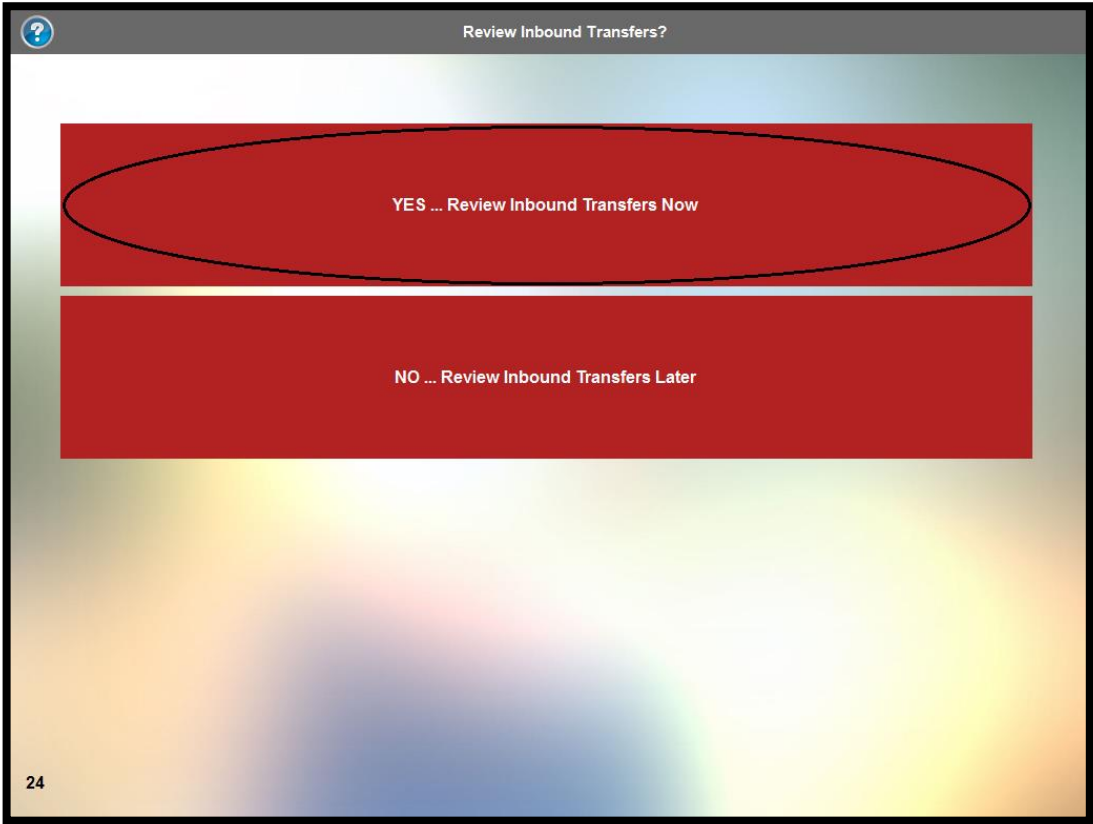
The “Current Order” button is used to transfer a single order to another employee. If the order is comprised of multiple checks, then all of the checks attached to the order become a part of the transfer. To transfer the current order, recall the order or any of its constituent checks (if the order is 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 “Misc” button, 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 “Misc” 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.

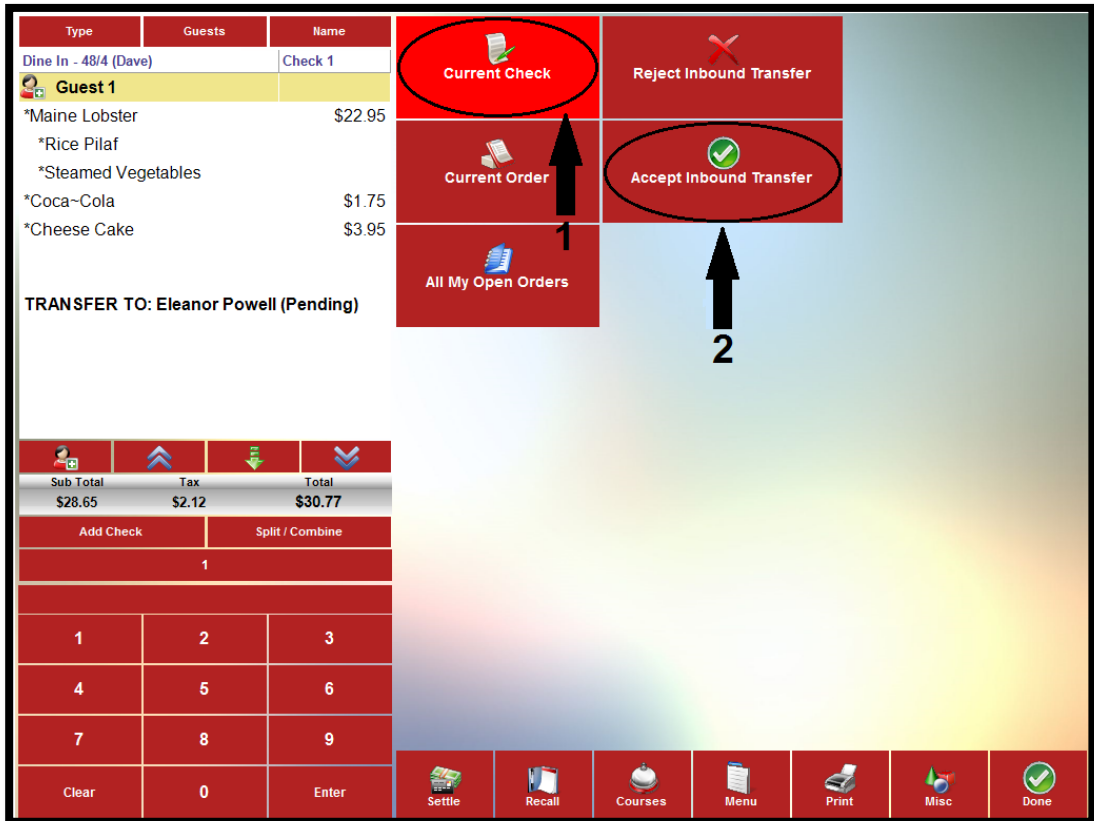
**Acceptance or Rejection of Inbound Orders by the Transferee**

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 by clicking the “YES... Review Inbound Transfers Now” button or may choose to review the transfers at a later time by clicking the “No... Review Inbound Transfers Later” button (See Figure 7-129).



**Figure 7-129**

In either case, upon reviewing the list of inbound transfers, recall one of the orders to display it in the smart check panel. Next, click the “Misc” button and then click the “Transfer” button. 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 selections, the user then accepts or rejects the inbound transfer by clicking the appropriate button (See Figure 7-130).



**Figure 7-130**

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, the transfer is cancelled and the orders no longer show as pending transfer in the transferor’s list of orders.



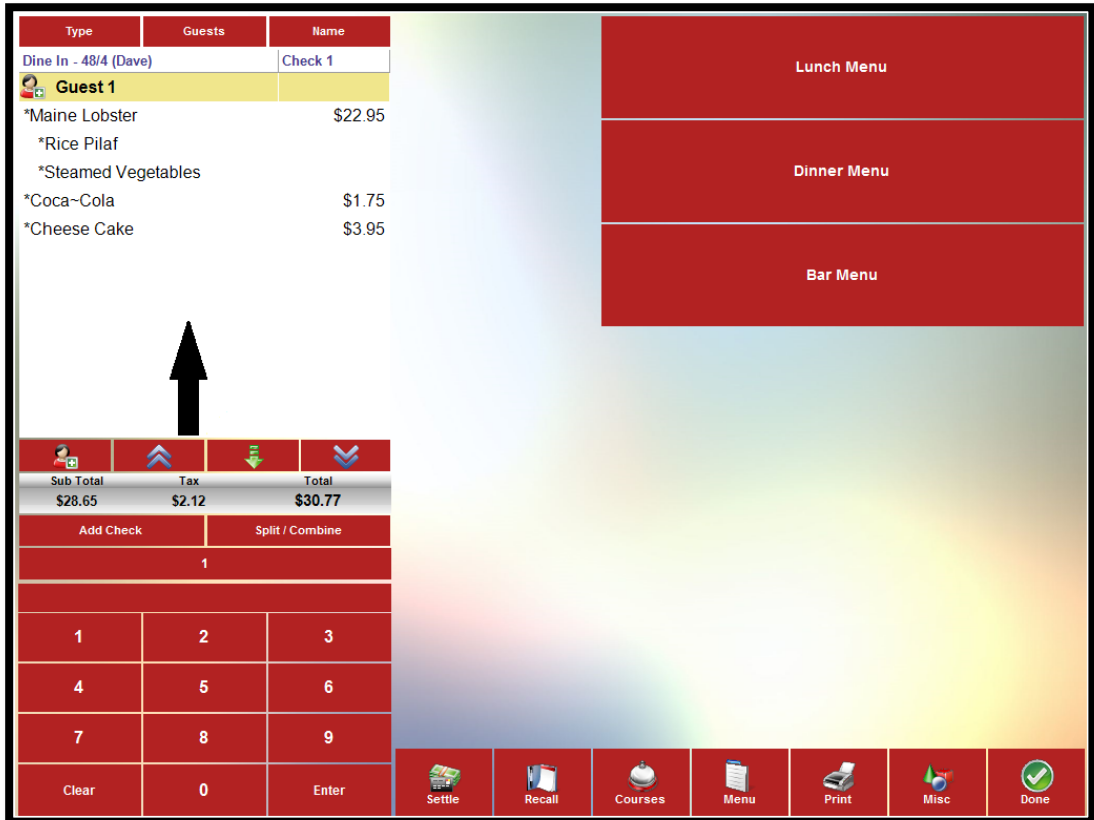
**Cancel Pending Transfer**

If the transferor changes his mind and now wishes to cancel a pending transfer, it may be accomplished at any time up until the transfer is accepted by the transferee. To do so, recall any of the checks or orders that are a part of the transfer, click the “Misc” button, click the “Transfer” button, and 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 7-131).



**Figure 7-131**

Now, if the transferor 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 was successful (See Figure 7-132).



**Figure 7-132**

## 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 35 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 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 that is currently displayed on the screen. To print the guest check, simply select the "Misc" button and then click the "Print" button. The information on the guest check prints to the designated receipt printer in the form of a customer receipt (See Figure 7-133).

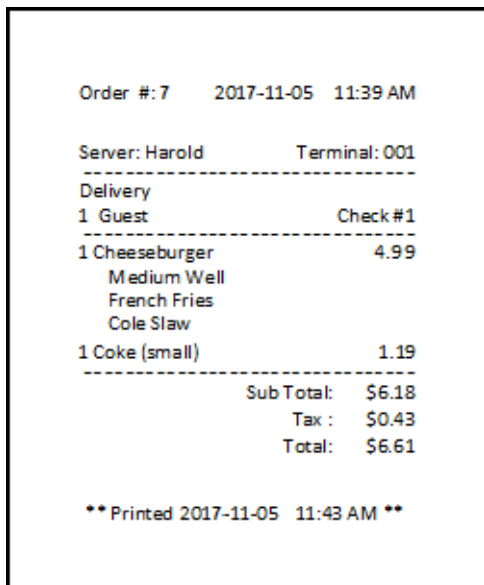


Figure 7-133

## Folio Inquiry

The **Folio Inquiry** feature allows the user to check the guest's folio to see if it can accept charges. Please note that to access this feature, the POSApp.SettleTask.FolioInquiry security object must be assigned to the employee in the XERA® POS Manager application by navigating to **Company Tab > Settings > Security Roles**.

**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 215 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 8

## Done

Click the “Done” button when finished entering the customer’s order to send the order to the kitchen for preparation (See Figure 8-1).



**Figure 8-1**

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 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





