Manager Manual

Win-EZ Manual Version POS 8.24, Manager 2.38

Printed: June 2011 in Sarasota, Florida

Publisher

Hospitality Data Systems, Inc.

Table of Contents

Foreword

This is just another title page
placed between table of contents
and topics

Part I

1 Win-EZ Manager

1.1 Common Win-EZ Navigation

1.1.1 The Top Tool Bar

As with any Windows based program Win-EZ Manager has a Tool Bar. Each function is described below.

The File Button

Open: In a dealer setting or multi store, this may be used to open different profiles already created.
Save: This option will save all the current setting made to the application.
Print: Using this option will print the report that is currently displayed.
Profile: This will open directly to the profile screen found under Settings Button.
Shortcuts: This will navigate directly to the shortcuts screen found under the Settings Button.
Zip: This can be used to quickly use back up the Win-EZ Application. Choices are given of what information will be zipped up. Clicking the full back-up box will automatically take the Client, Data, Reports, Inventory, and Checks directories.
Exit: This can be chosen to exit out of Win-EZ Manager and shut the program down.

The Edit Button - These buttons can be used on either the Product screen, the Staff screen, or the Reports screen.

New: This will open the window to create a new "item".
Modify: This will open the modify window of the highlighted item, if applicable.
Delete: This will delete whatever item is highlighted.

The Maintain Button

These menu options will navigate directly to the section that they are named after.

The Reports Button

These menu options will navigate directly to the report section that they are named after.

The Help Button

About Win-EZ Manager: This will display the current version of software that is operating and other information.
Table of Contents: This will open the in program help feature.
License: This will open a window to display current license information.

Web: A shortcut to launch the POS Support web site.

1.1.2 Calendar

Some sections of software require a date in order to load a file, this calendar will often be used.

The red circle will show the current day. The black oval will highlight the current date chosen for the job in question. To pick a day on the calendar just click the day needed. If a different month is needed, either click on the current month to get a list of all 12 months or use the arrows at the top to move forward or backward one month. If a different year is needed, click on the current year and then click the up and down arrows to pick a new year.

1.1.3 Working in a Table

Using the Header Column to Regroup Items

Pic	PLU △	Description	Price 0	Group	Dept	Mnu Page	Mod Grp	Mod Seq	Mod
	1	WinEZ Ver 6.70b	$0.00		NONE	[None]	[None]	[None]	
	2	LUNCH	$0.00		NONE	[None]	[None]	[None]	
	3	CUP BLACK BEAN	$4.95	APPS	FOOD	APPS/L	[None]	[None]	
	4	*	$0.00		NONE	[None]	[None]	[None]	
	5	CUP GAZPACHO	$1.69	APPS	FOOD	APPS/L	[None]	[None]	

On the Product and Staff screens there are column headers (above picture) that are defined by the black column. The database can be regrouped any of the lists in those specific column headers by clicking on them. This will alphabetize the selected column.

Numbers and symbols will be placed before the alphabet. A second click on the column header will invert the list to start at the end of the alphabet. In the example above, the triangle is in the Product Items column pointing up. So the list will show the Product Items in order from 1 to 1999. A second click will invert the list to show the Product Items 1999 first and Product Items 1 as the last.

A click on the Dept column header (below picture) will regroup the list alphabetically by that header. A list of all departments will be grouped in the field.

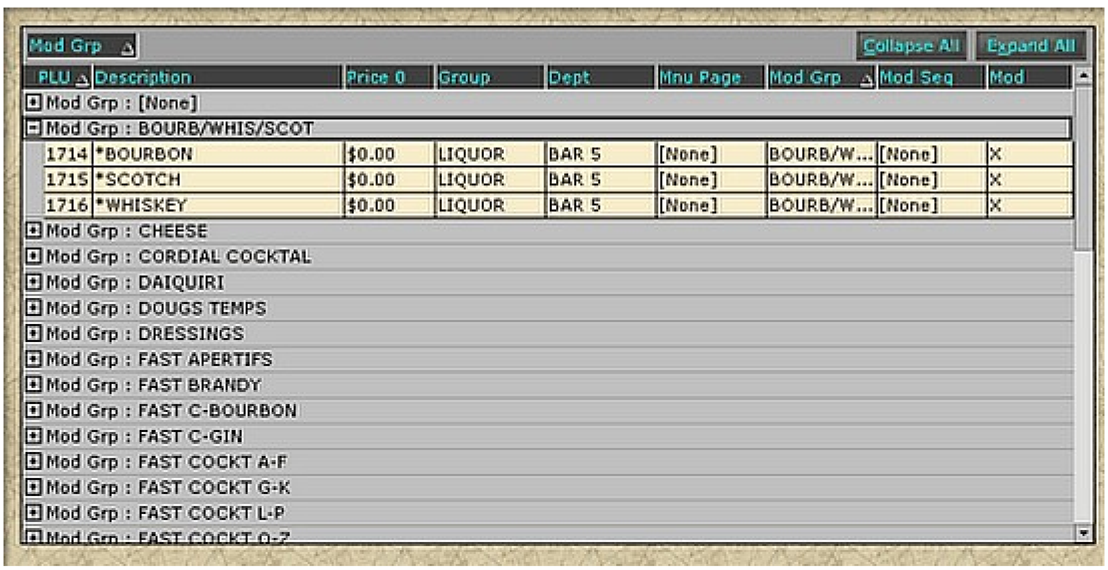
Pic	PLU	Description	Price 0	Group	Dept △	Mnu Page	Mod Grp	Mod Seq	Mod
	999	BANQUET DEPOSIT	$0.00	BANQUET…	BANQUET…	[None]	[None]	[None]	
	989	OPEN BAR ITEM	$0.00	OPEN BAR	BAR	[None]	[None]	[None]	
	994	BANQUET BAR	$0.00	BANQUET…	BAR	[None]	[None]	[None]	
	997	LQ-LIQUOR SURCHAR	$0.00	FL LIQ SU…	BAR	[None]	[None]	[None]	
	1001	ABSOLUT	$6.00	LIQUOR	BAR	LIQUOR A…	FAST C-V…	VODKA C…	

Using Collapse All & Expand All

By clicking and holding down any column header, drag the column header the gray area above, which will categorize the list by that column header.

Collapse All: This will close all the Product Items in the sub groups for the column header.

Expand All: This will open all the sub groups of the column header to view all the Product Items.



The example above shows the modifier group pulled up to the gray area. By clicking on the + (Product Items) sign next to any sub group to open Product Items only. Clicking on the - (minus) sign will hide the Product Items again.

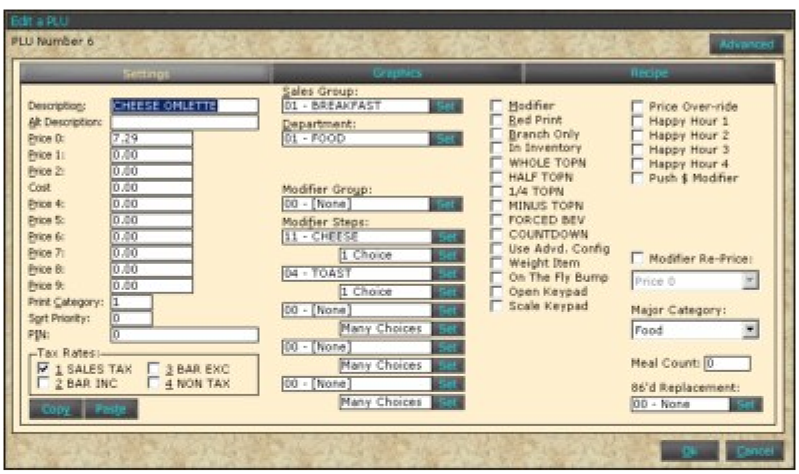
1.1.4 Hover Feature

When certain windows are open a "Hover" feature displays the information the group or window has associated with it.

1.1.5 Hot Keys

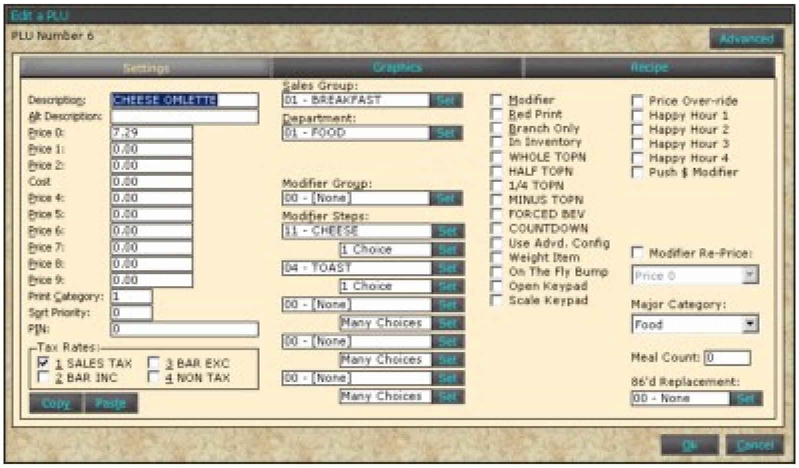
Hot keys are designed to allow fast and easy maneuvering in windows and tool bars.

As an example: The letter D is underlined in the "Department" field. By pressing and holding the "Alt" key on the keyboard and pressing the underlined letter, the input field (in blue) will jump directly to the department field.



1.1.6 Copy/ Paste

Copy/ Paste is the fastest way to program many items at once. Build the first item exactly how it's needed then press "Copy" at the bottom of the Product Item Window. Press "Okay" then open an empty item from the database and press "Paste". Change the Description and price if necessary.



Another way to Copy/Paste is from the Product Item Database list.

Using the keyboard:
Highlight the item to be copied and using the Windows command of "CTRL-C" copies the line item. Arrow down to the next available line item and again using the Windows command of "CTRL-V" to copy the item. Change the description and price as necessary.

Using the mouse:

Another shortcut is using the mouse to copy/paste. Click the item to be copied only once so the field box is circling the item and RIGHT click the mouse. Move the field box to an open Product Item and RIGHT click the mouse again. A list will show what has been copied and choose the item to be pasted.

1.2 The Product Button

The **Product** section is to create menus. Each section has a specific purpose that ties into each item.

To create a menu each section is used, some for item set up and some for reporting purposes only. The subcategories in Product is listed below. The following section will explain how to build a menu.

Product Items: Product items lists all items on a menu. This includes menu items, modifiers, coupons, and fast bar items.

Sales Groups: This is a list of all the sales groups.

Departments: This is a list of all departments.

Menu Pages: This is a list of all menu pages available.

Modifier Groups: This is a list of all modifier groups

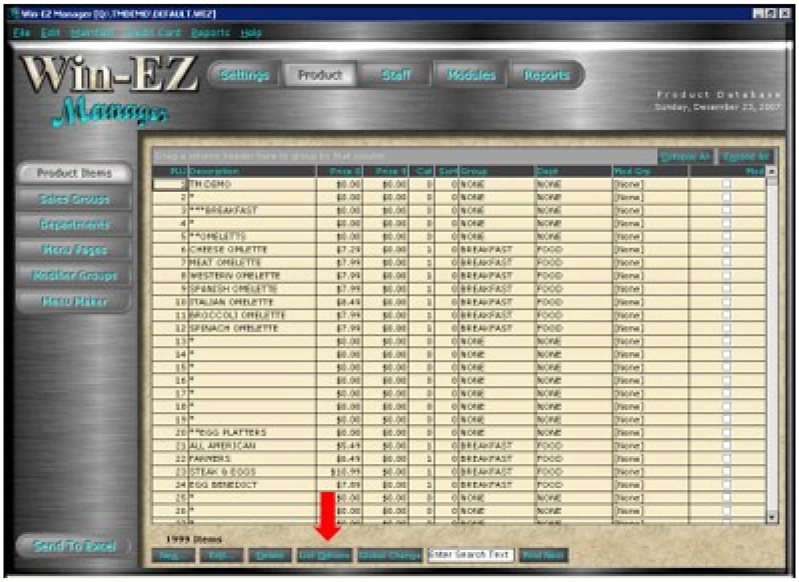
Menu Maker: Used to design a menu with all the Product Items.

Send To Excel: Used to send whichever list is chosen to an Excel document.

1.2.1 List Options

The Product Item list contains up to 1999 Product Items. With such a large database it is sometimes difficult to find the item quickly.
Using the Navigation "In Grid" or sorting by topic are 2 ways to find product quickly. List Options is another way.

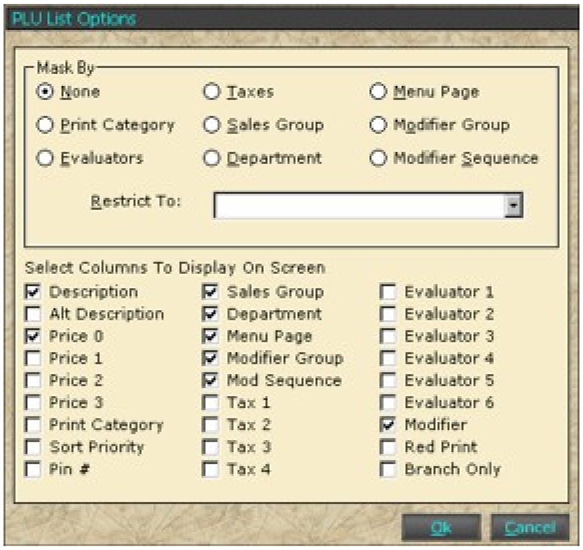
Press "List Options"



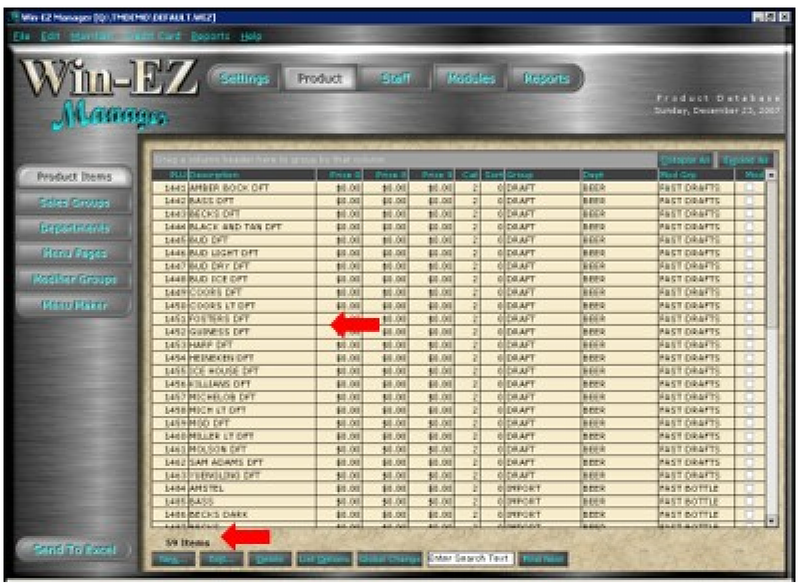
The top section "Mask By" is the common denominator to narrow the Product List from a full list, to those in a specific group, page or department.

Press which common group to narrow the field such as "Department"
Use the down arrow next to "Restrict To" to choose which group of items should be displayed such as the Department of "Beer"

The section "Select Columns to Display" will display only the fields that are need for review. Place check marks next to any information that is needed. The list will display with the information chosen in the same format as the Product List.



Press "Ok" to display the information requested.



The information that was requested will display. Notice that instead of 1999 items listed only the item in the requested group is shown.

To reset the Product List to have the complete database reverse the process but choose "Mask By" None

1.2.2 Global Change

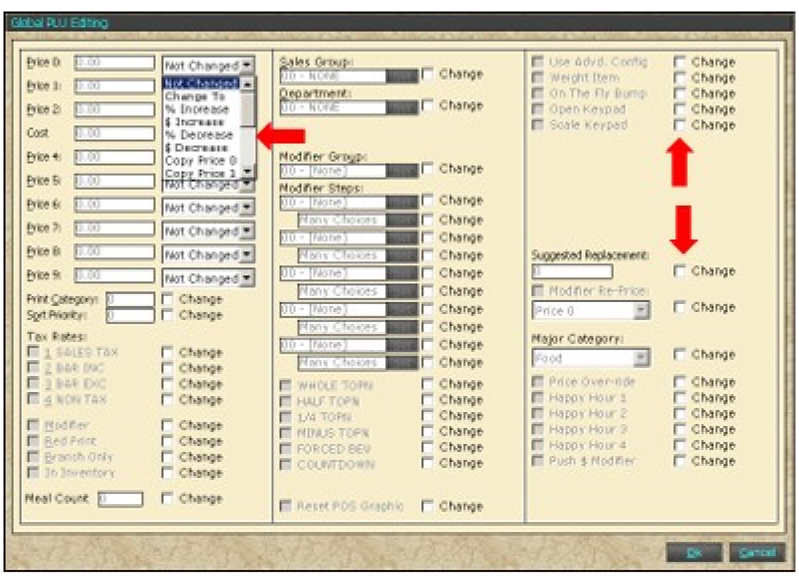
Global Change is a time saving feature that can change multiple menu items at one time. Once the main Product Items are created changing a setting for a large group of items would be time consuming and items may be missed.

There are 2 steps to Global change.

The first is WHAT information needs to be changed and to what. As an example if the price of all the beers need to be raised by $0.25 changing the Field **Price 0**, which is the default price to "Increase $" will change all the beers that are included in the second step by choose the common denominator for the beers, which would be the "Department" of beer.

To make global changes press "Global Change"

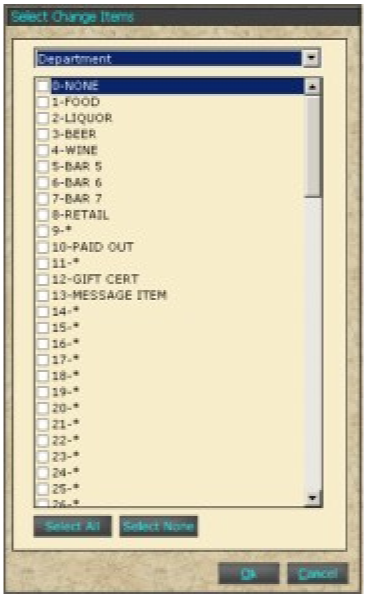
Step 1:
Choose which field needs to be changed by either dropping down the arrow next to the field or by placing a check mark next to the field. The field will change color to BLACK for editing.
Make the necessary change to the field.



Press "Ok" after the change needed is made.

Step 2:

Choose the common denominator for the group of items that needs to be changed. The common denominator could be Sales Group, Department or it can be done by each item. Place a check mark in the common denominator.



Press "Ok" after the choice is made.

The screen will display the Product List with a message that says "Changing Product.."

Once the change is made the screen will start at the Product List again.

1.2.3 Departments and Sales Groups

Menu Building begins with set up of Departments and Sales Groups. Departments are "major" reporting categories such as Food, Beer, Wine, and Liquor. Sales Groups are "minor" reporting categories which break the items down for more detailed reporting.

To create Departments or Sales Groups choose which list to work with first and press the section.

Departments

To add a new department, press the New button at the bottom of the page. This opens a box to name the department. If the department number is created in the list already, double click the line item to change the name. There are 99 departments.

If the databases are filled with asterisks as a place marker, double click on an asterisk (*) to open the window to add a description.

NOTE: There are some departments that are used for in other areas of the system. Most of these are in the 90's. Before deleting contact an authorized Win-EZ dealer for more details.

SALES GROUPS

To add a new Sales Group, press the New button at the bottom of the page. This opens a box to name the Sales Group. If the Sales Group number is created in the list already, double click the line item to change the name. There are 99 Sales Groups.

If the databases are filled with asterisks as a place marker, double click on an asterisk (*) to open the window to add a description.

NOTE: As with Departments there are some Sales Groups that are needed elsewhere in the system. Before deleting contact an authorized Win-EZ dealer for more details.

NOTE: DEPARTMENTS AND SALES GROUPS ARE USED FOR REPORTING PURPOSES. IF A DEPARTMENT OR SALES GROUP IS DELETED AFTER SALES ARE RECORDED TO THEM, THE REPORTS WILL ONLY REFLECT AN ASTERISK (*) WITH NO INFORMATION OTHER THAN THE DOLLAR AMOUNT.

1.2.4 Modifier

Modifier Groups are like items that ask a question for kitchen preparation. Some examples of groups are Temperature for steaks and burgers. Once a group is created, it can be used for multiple items.

There are two steps to creating a modifier group. The first to to name the group. This is done in the "Modifier Group" section.

To create a new group press the "New" Button at the bottom of the page or double click an open group that is already created and has an asterisk (*) as a place marker.

Name each group with common names such as Temperature, Preparation, and Starch Choice.

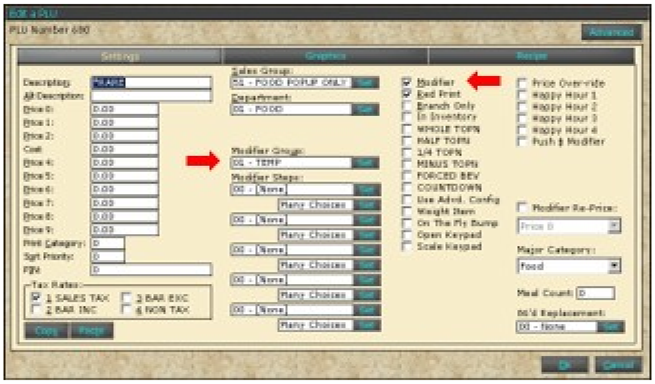
REMEMBER:This is only a name for like items.

If the databases are filled with asterisks as a place marker, double click on an asterisk (*) to open the window to add a description.

To create the modifier Press "Product Items" and find an open section.

NOTE: for easier reporting find a section that can accommodate a large section for "Forced Modifiers".

Double click to open the Product Item.



Modifiers use different sections than Menu items even though the same Product item section is used.

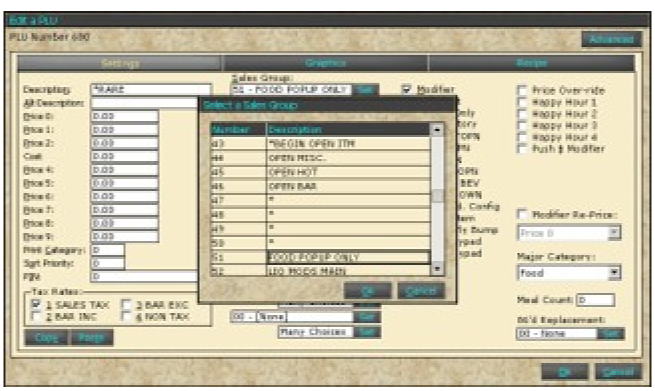
Add a **Description** such as Rare for a Temperature. NOTE: By placing an asterisk (*) as the first character when it's printed at the remote prep printer is will be indented to give the kitchen or bartender a visual marker.

As with Menu Items, using Alternate Description will have the modifier print that section to be prepared.

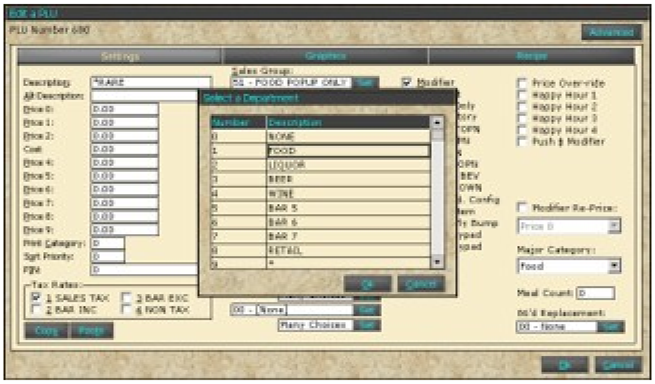
Add a **Price** if the modifier needs to be "up charged". As an example, if Egg Whites are an option but is charged $1.00 more than scrambled eggs, enter the price in Price 0.

A **Print Category** is not necessary because a modifier attaches to the menu item and prints to where the item is printed.

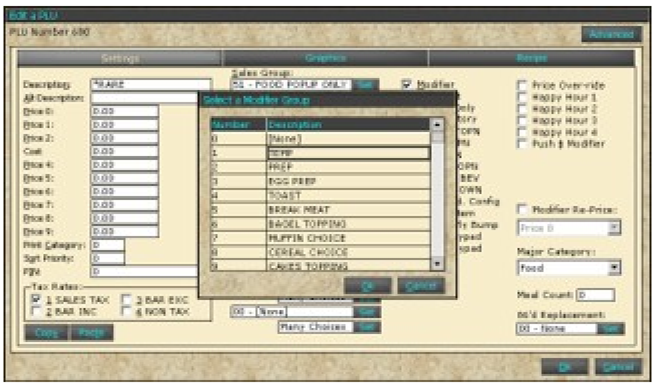
Select a **Sales Group** that was created in the Sales Group section. Press "Set" to display and choose the Sales Group. Usually one Sales Group is used for all the modifiers



Select a **Department** that was created in the Department section. Press "Set" to Display and choose the Department. Usually one Department is used for all the modifiers.



Select the **Modifier Group** that was created in the Modifier Group Section. Press "Set" to display and choose the Group that this modifier By choosing the group all the modifiers will be prompted when the Menu Item is used.



Because this is a modifier "**Modifier"** must be checked. If modifier is NOT checked it will not attach to the parent menu item and will not print to the preparation printers. If modifier is NOT checked on one modifier but is checked on another NOTHING after the unchecked modifier will print. Example: if a cheese burger is asking "Temperature" with Medium, "Cheese Type" with Cheese, " Burger Topping" with Lettuce, Tomato, Onion and Pickles BUT Cheddar is not checked as a modifier all the modifiers after the Cheese selection will NOT print to the preparation printer.

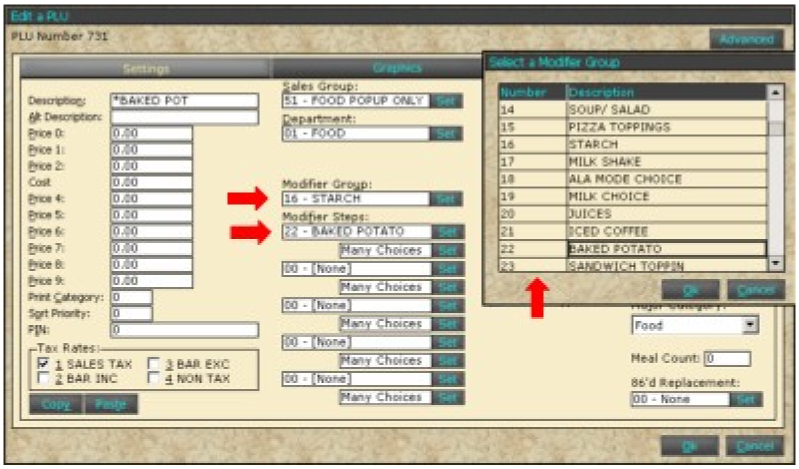
Select **"Red Print"** to have the modifier print in red to the preparation printers. This option works only if the preparation printer model has red and black print options.

Select "**Push $ Modifier"** to have the priced modifier (see example in **Price**) added to the menu item on the receipt for customers instead of a separate line item for the modifier.

1.2.4.1 Additonal Modifier Options

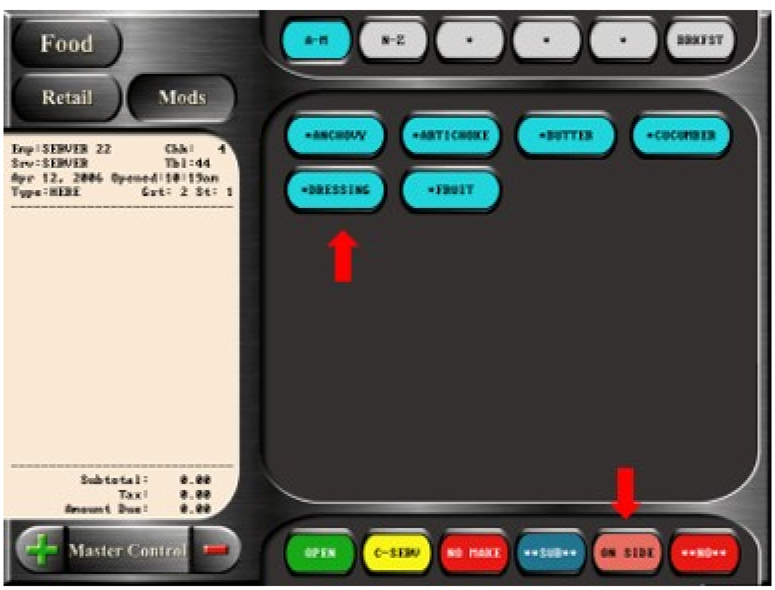
Modifying a Modifier

Modifier Steps are used on each item to ask a question. Modifying a modifier allows the server to provide additional information to the kitchen or bar preparation printers. The following example shows a "baked potato" is in the Modifier Group of "Starch" however the baked potato has options such as butter, sour cream, cheese and bacon which the other starch options do not. By creating a Modifier Group of "Baked Potato" and attaching the group to the modifier of "Baked Potato" when that option is chosen the question of how the baked potato should be prepared is asked.

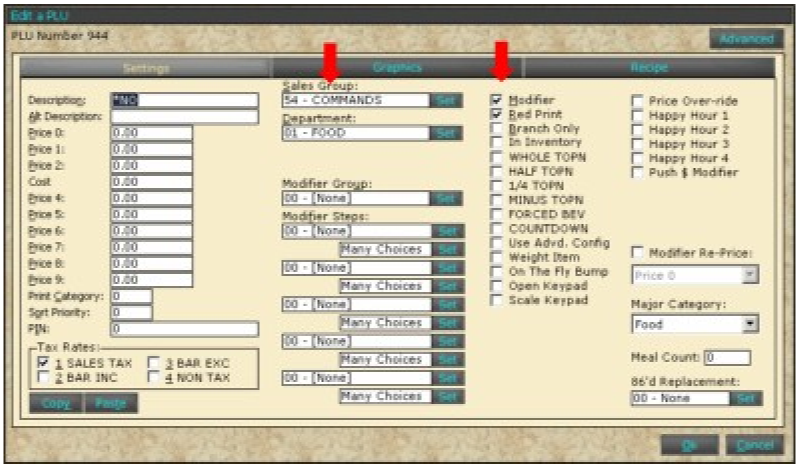


Optional Modifier Groups

Menu ingredients are "Modifiers". To change a menu item in some way, use "Mods".

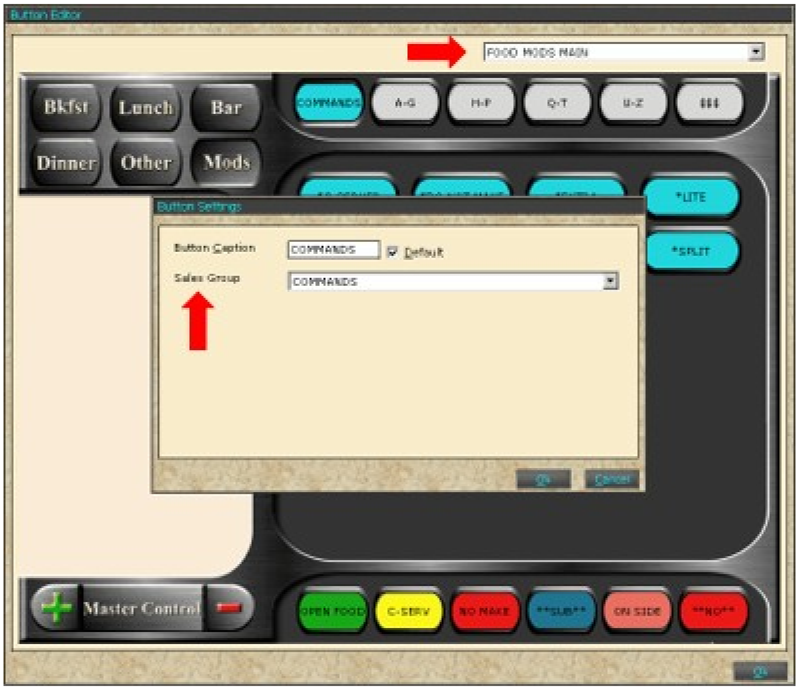


Set Up for the "Optional Modifiers" is similar to the Modifiers except the optional Modifiers use "Sales Group" not "Modifier Group".

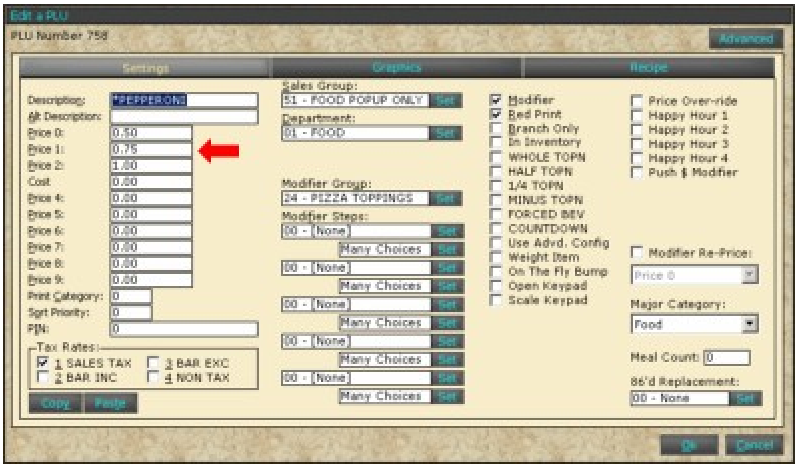


The modifier will still be checked as a Modifier and Red Print.

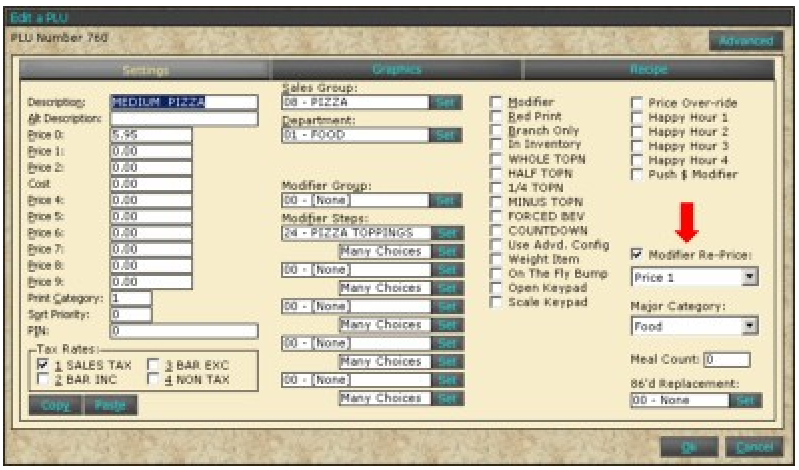
The "Sales Group" is then attached to the "Food Mods Main" screen in Button Editor.



Reprice Modifier is used when one modifier has multiple prices such as a pizza topping. Set up the Modifier with multiple prices.



On the item check "Modifier Re-Price" and choose which price level the modifier should charge.



Whole/ Half/ Minus Toppings is used with "Pizza Options" in the "Advanced" section on the Product Item.

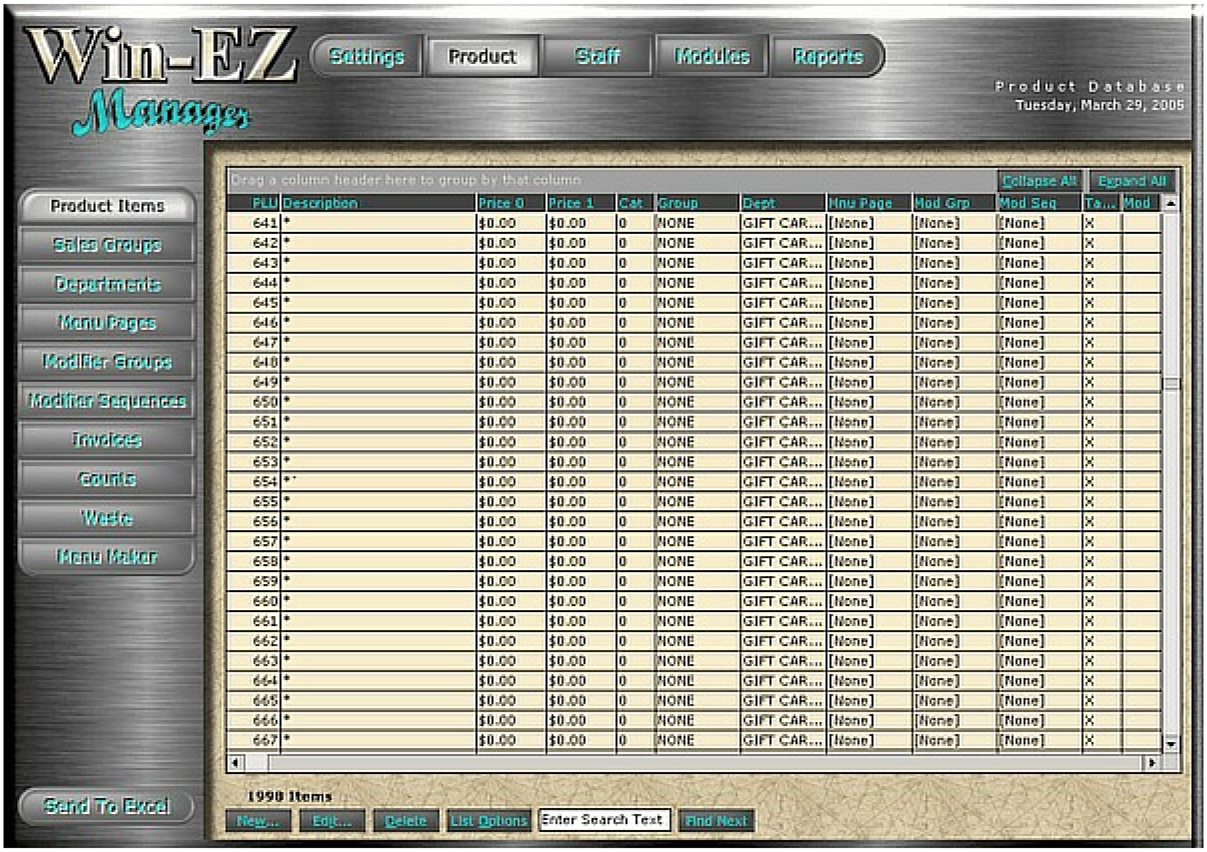
Push $ Modifier will make the modifier price add to the parent menu item price on guest receipts. Each modifier can be set up to add to the parent menu item or not.

1.2.5 Product Items

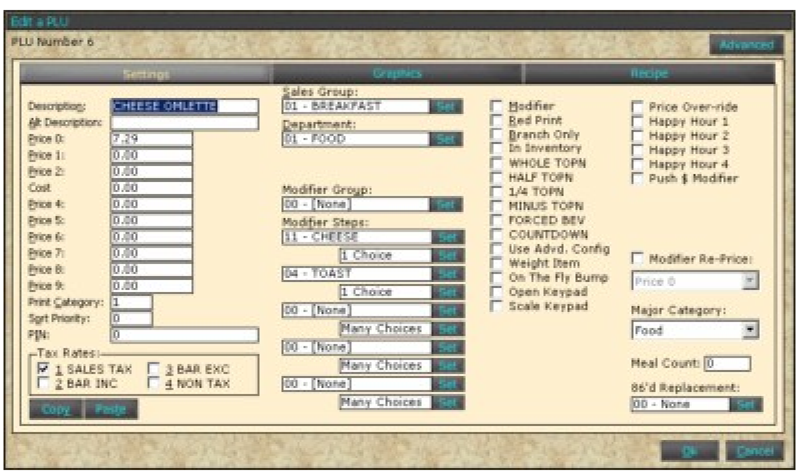
To edit a PLU; double click the item in the grid, or select the edit button.

PLU's that have an "*" for their description are available for use, and have been populated for your convenience.

PROGRAMMING HINT: Keep like items together in the product list. All reports print by the Product number so having an appetizer at number 5 and 500 will make the items in that section print on different pages.



1.2.5.1 Settings



Enter the item **Description**. It can have 17 characters. If the item is 2 words, the description will be divided on two lines on the Point of Sale. The description will print on guest receipts so if abbreviations are needed because the item is too long abbreviate so servers and customers understand the information. Note:Do not use certain characters such as quotation marks (") or exclamation point (!). A period (.) is used for spacing with Sort Priority.

Alternate Description is used if different information is needed to the kitchen or bar. This can be a longer description of the item or a different language. To use Alternate Description, set up for printing to preparation printers is in Settings/ POS Settings/ Remote Printing Options.

Price 0 is the default price. **Price 1, 2, 4, 5, 6, 7, 8, and 9** is used for price changes such as happy hour and early bird. If different price levels are used, **Happy Hour 1-4** must be checked. Set up for price changes is a set up per item, by Staff /Job Code/ Advanced and in Settings/ POS Settings/ Happy Hour 1-4.

Print Category uses a number to send the item to a preparation printer. The item can print to more than one printer but still uses one number in the print category. For set up of preparation printers see Settings/ POS Settings/ Remote Print Options.

Sort Priority changes WHERE the item is placed on the Point of Sale screen. If Sort Priority is not used all items attached to a menu page will be listed in a display logic. The display logic is character (*,#,$), Numeric (1, 2, 3), then Alphabetical (A,B,C). If using Sort Priority the lowest number entered displays on the Point of Sale Screen first. If no sort priority is used all the items will display in alphabetical order

Pin Number is used for SKU number, Bin Number look up, or bar code input that is associated with the item.

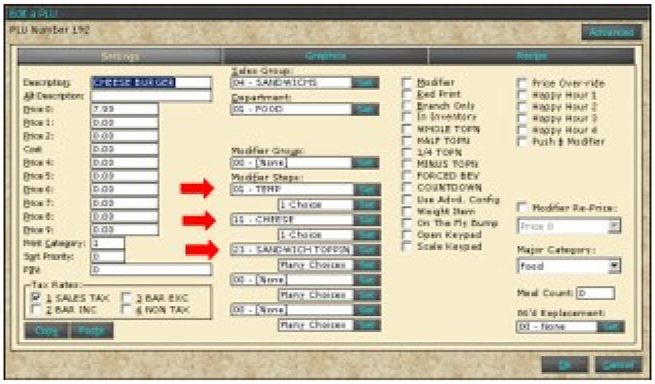
Sales Tax: There are 4 Sales Tax options: Sales Tax, Bar Inclusive (INC), Bar Exclusive (EXC) and Non Tax. Each has a specific use. Sales Tax is for normal food items and for bar items that are charged a straight sales tax. Bar Inclusive and Bar Exclusive work together. Bar Inclusive/ Bar Exclusive can be used with Smarter Tax. Smarter Tax works as such: If Inclusive/ Exclusive tax is checked and Smarter Tax is turned on in Staff/Job Code/ Advanced bar items will not have tax included in the price. Tax will be inclusive UNTIL a food item is rung up, then all the items revert to exclusive tax. Example: If a beer is $2.00 inclusive all the beer will be $2.00 until food is rung up. Once food is rung up the beer reverts to $2.00 PLUS tax.

Note: Inclusive tax lowers the Gross Sales. A $2.00 beer is actually $1.90 plus tax of $0.10 to total $2.00 for the customer.

Sale Group Press "Set" in the Sales Group field to assign the item to a Sales Group which was created in the first steps.

Department Press "Set" in the Department field to assign the item to a Department which was created in the first steps.

Modifier Steps-Using a Cheeseburger as an example Modifier Steps are the questions asked of each item for preparation.
Step One would be the temperature the cheeseburger needs to be cooked. The Modifier Group was created with all the temperatures (Rare, Medium Rare, Medium, Medium Well, Well) and ONE choice must be picked for this step. When the temperature choice is made the system moves onto the next step. Next is what type of cheese goes on the burger, that also has one choice. After that toppings choices are needed but that group has more than one choice. A "Done" button displays on the screen to allow servers the option to choose as many options as needed or none.



Depending upon the type of system, and particular setup used, You may need to attach the item to a **Menu Page** from within the PLU edit screen.

NOTE: if the item is NOT attached to the menu page, the item will not show on the Point of Sale and will NOT be accessible for ordering.

Modifier button is used when the product item is a Modifier not a Menu item. Modifier set up is explained in "Modifier" section.

Red Print is checked the item or modifier will print to the preparation printer in Red if the preparation printer model allows for red/black print.

Branch Only is used on the Fast Bar Screen. The Branch only Product item is set up with a Modifier Step with the items. The Branch only Product Item displays on the screen but does not show on preparation printers or receipt printers.

In Inventory works with the Retail Inventory program in Win-EZ Manager. Retail Inventory is explained in the "Retail Inventory" section. If the item is not checked it will not display in the inventory section for tracking. Retail Inventory uses Price 3/ Cost.

Whole Topping, Half Topping, 1/4 Topping, Minus Topping are pizza topping settings. This section works with Product Items/Advanced/ Pizza Options. See Additional modifier options

Forced Beverage is checked per item to determine if the item is a "Forced Beverage" based on guest count when starting a check. If Forced Beverage is turned on in Settings/ Pos Settings/ Receipt Printing Options.
NOTE: ALL beverages must be checked with "Forced Beverage". There should also be a "No Drink" or "Water" menu item added to the menu pages in case the guest does not order any beverage.

Countdown is used when using the 86'd feature on the Point of Sale. Each item has to be checked to appear on the 86'd list.

86'd Replacement is used along with the Countdown feature. Add a like Product Item to the item. If the original item is out of stock the system will suggest a replacement based on the input.

Use Adv. Config turns the Advanced Configuration on per item.

Weight Item: This feature is used when a scale is attached to the system for items such as deli meats. It uses a Toledo emulation. When the item is programmed, use PRICE LEVEL 2 for the price per pound. If no scale is attached, a keypad will display to enter the weight of the item.

On the Fly Bump feature is no longer used.

Open Keypad: Check this box if the item has an open price. This will bring a keypad up on the Point Of Sale for employees to enter the price. There is also a command that can be placed on the "Master Control" page to use open pricing.

Scale Keypad allows for items priced by the pound to be entered. Enter the price per pound in Price Level 2. The item is set up like a regular menu item but will ask for the pound and calculate the price accordingly.

Major Category: There are 3 "Major" categories: Food, Bar and Retail. The main purpose is to let the system know that the item is a bar item and will behave as set up in Staff/ Job Code/ Advanced. This will tell the system to use Inclusive/ Exclusive taxing or whether to bring up modifier steps when ordering drinks.

1.2.5.2 Graphics

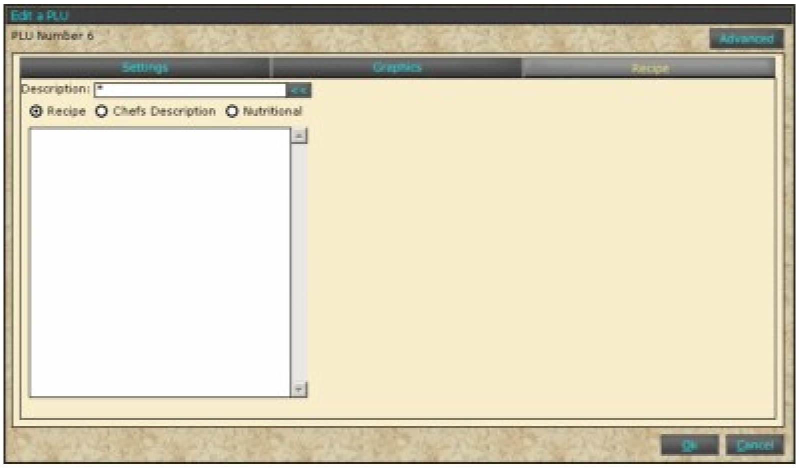
Graphics change the look of the buttons on the Point of Sale Screen. Changing colors or adding a graphic changes the look of the screen and can help divide like items together for faster screen usage. Pictures can be added to show staff what a correctly set up dish would look like.

The Left section is to change the button color or to use a graphic.
There are 3 sizes for graphics used for different screens at the Point of Sale in a future Button Editor release. Currently ONLY the **Large** button selection is available.

The right side of the graphic page allows for a picture to be imported. A digital photo must be saved on the computer. To Import a picture press "Import Picture". Using the Windows Select function, find the photo desired and press "ok".

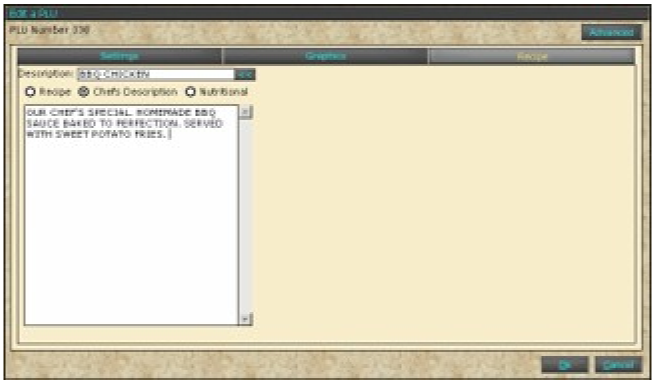
1.2.5.3 Recipe

The Recipe section allows for more information to be added to each Menu Item. There are 3 options: Recipe, Chef's Description, Nutritional along with a section for a larger Description which the Menu Maker utilizes. To add information to an option, select which option by placing the dot next to the function.

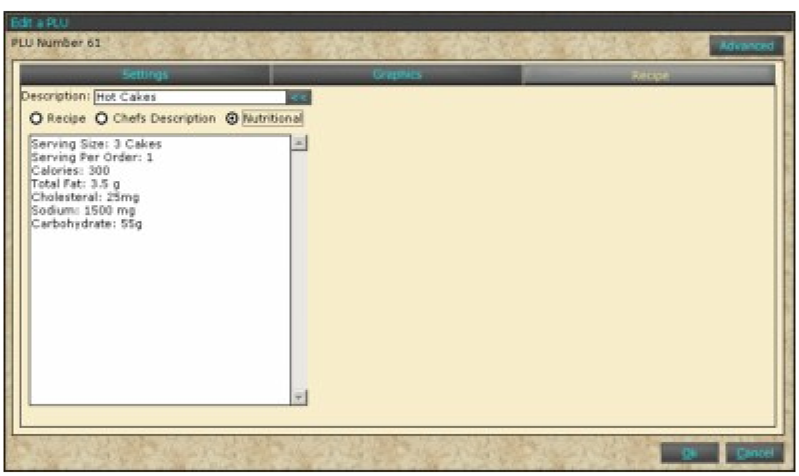


To view the Recipe from the Point of Sale:
Press the "R" button then the item. The recipe will display along with any imported picture that has been included.

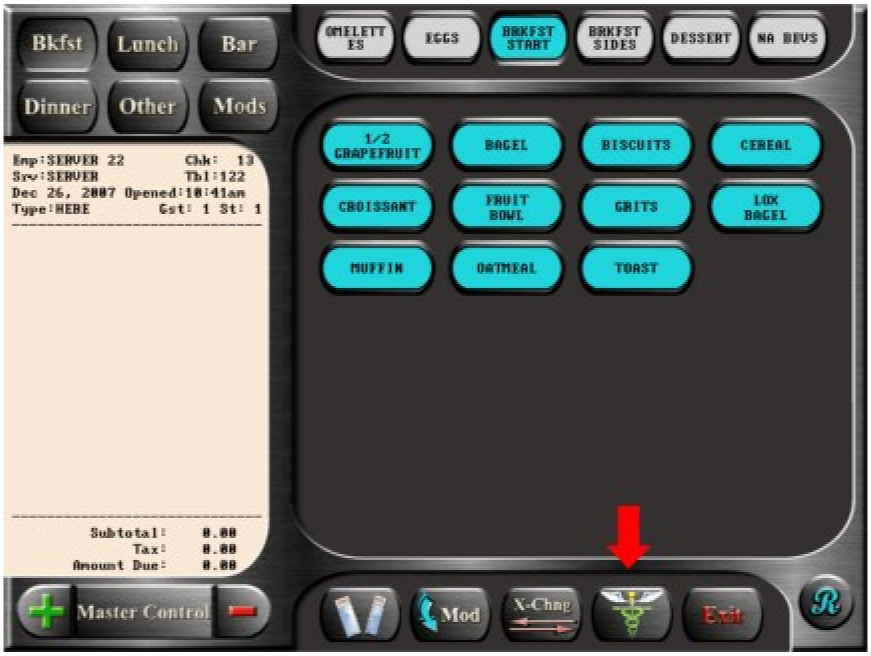
Chef's Description is used along with "Menu Maker". By adding a longer Description and the Menu Item Chef's Descriptions such as the size or what ingredients are used, it will then display on menus created in Menu Maker. See Menu Maker for set up of menus.



Nutritional information is used for calorie count, serving size and sodium count similar to the nutritional information found on pre packaged foods. Place the dot in the Nutritional section. To access the information press the Nutritional command then the item.

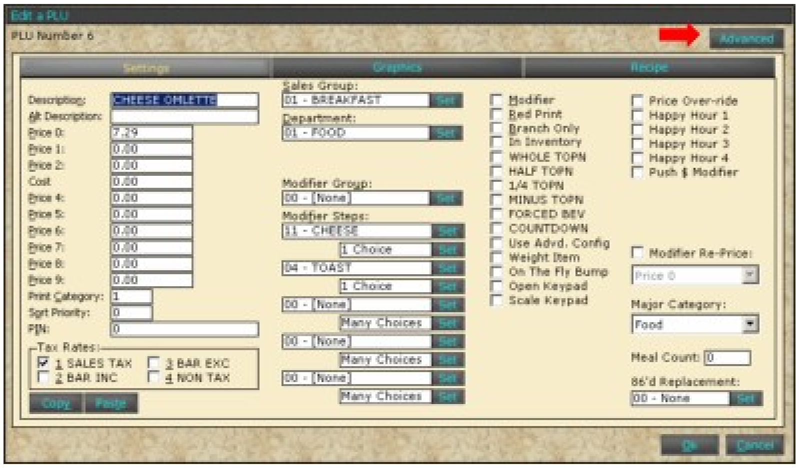


To access the information press the Nutritional command then the item. The Nutritional information entered will display on the screen and can be printed for the customer.



1.2.5.4 Advanced

The Advanced Settings in Product items are for more programming information by Menu Item. Each Item has specific needs and the following section will explain the advanced options. To access the Advanced options press the "Advanced" Button on the Product Item.



1.2.5.4.1 Options

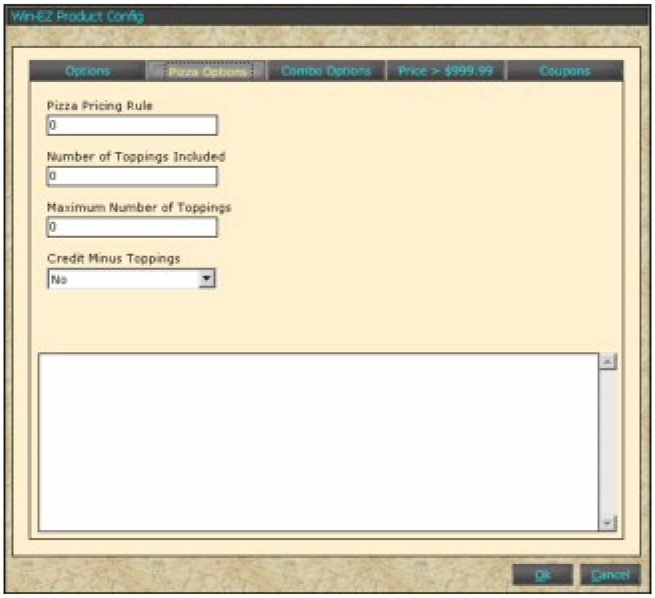
Advanced Config Type:
This will let the system know if advanced product item configuration options are used for this product item. The system will default all product items to Standard Item unless told otherwise. If a non standard option is selected set up the advanced options on the desired tab.

To Go Charge: Enter an amount if the item has a charge associated with To Go Items such as

Recycle / Deposit Fee:
If turned on in Pos Settings/Global Options/Global Options the system will scan the check and look item by item for this setting which could be off or set to a dollar amount. This way items can have

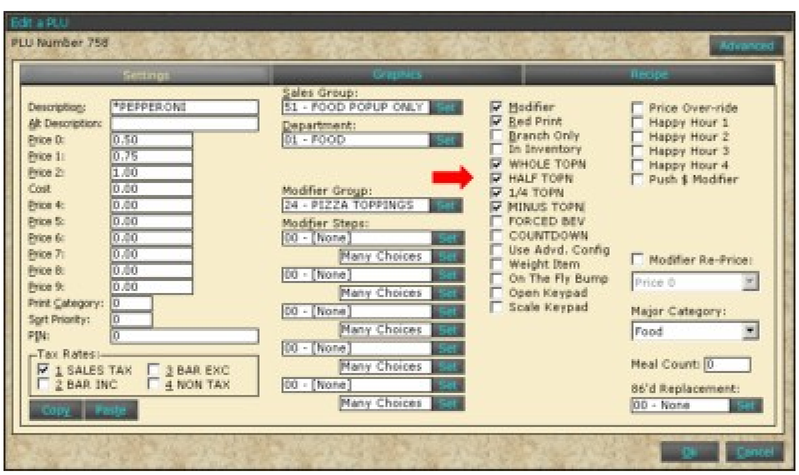
different amounts if required. Recycle / Deposit Fee uses product item number 997 which is named as desired and set to print category 9 to show up on the bottom of the receipt.

1.2.5.4.2 Pizza Options



Product Item Set up:
In the menu item database, check the box for items that are whole toppings, half toppings or quarter toppings. Then also check the box if it is a minus topping. Minus toppings will deduct from the total number of toppings that come with a specialty pizza to allow substitutions. If no substitutions are allowed, do not check minus topping for that modifier.

NOTE: The system uses a very advanced setup. If a NON Pizza topping is checked with Whole/ Half/ Quarter/ Minus Toppings but Pizza configuration is not being used, the item can experience problems when ordering.



Pizza Pricing Rule:

Pizza pricing rules are created from the Win-EZ config button on the Other Functions page. Pricing rules can be attached to multiple pizzas and allow every item on the pizza to potentially have a different price.

Example: A pricing rule for cheese pizza may have the first four items priced at $1.00 then .75 cents for the next four toppings then .50 cents for any topping after that. A supreme pizza may have three toppings included for free then start charging.

Pricing rules accommodate up to 20 whole toppings, 40 half toppings and 80 quarter topping. Because creating a pricing rule is time consuming a rule can be reused as opposed to having to create a unique rule for ever pizza on the menu.

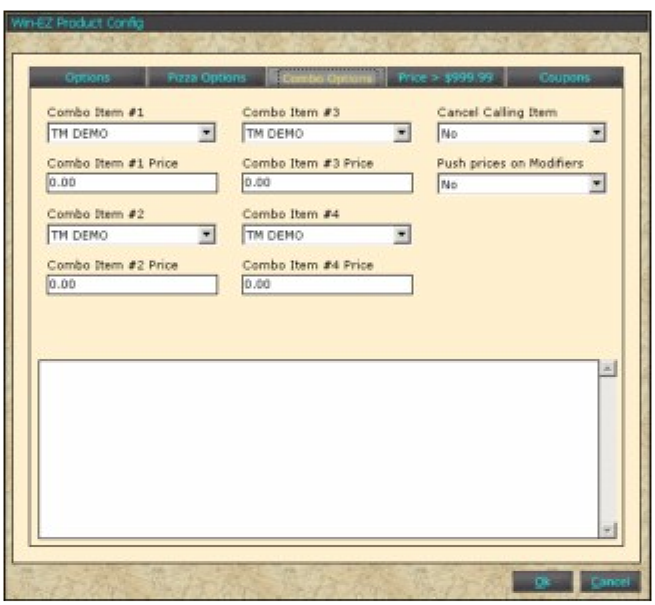
Number of Toppings Included:
This is the total number of toppings that are included in a specialty pizza. If a Meat Supreme comes with four meats enter 4 in this field.

Maximum Number of Toppings:
This will not allow a pizza to be processed with more than this number of topping. Note: Half toppings are worth 1/2 of this count and quarter toppings are worth 1/4 of this count.

Credit Minus Toppings:
Answer Yes to this if the base price of a specialty pizza is allowed to be lowered by ordering a "NO" topping that has the minus topping box checked.

Example: A Meat Supreme is $10.00 and comes with pepperoni, hamburger, ham and sausage. Toppings cost $1.00. If the customer wants no ham does the price reduce to $9.00?

1.2.5.4.3 Combo



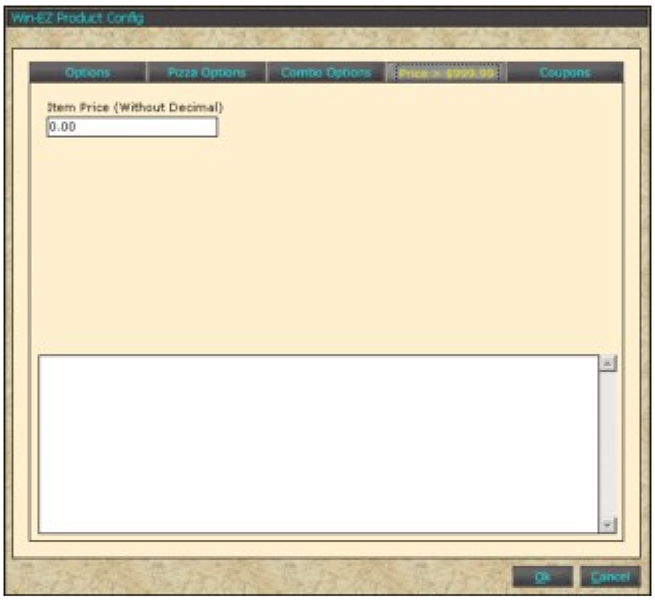
Combo Items:
This option is rarely used but is very effective when needed. A menu item can auto order up to four other items as defined on this page. Drop down the menu item list and select an item to auto order.

Combo Item Price:
Each combo item can have a unique price for ultimate flexibility. Enter the desired price or leave at 0.00 if the item is at no charge.

Cancel Calling Item:
The item that this combo uses may not be needed like COMBO #1 which calls Hamburger, Fries and a soda. If this is the case the system can auto cancel the COMBO #1 so it will not show up on the check or in reports.

Push prices on Modifiers:
By pushing prices, the modifier will add to the parent menu item price.

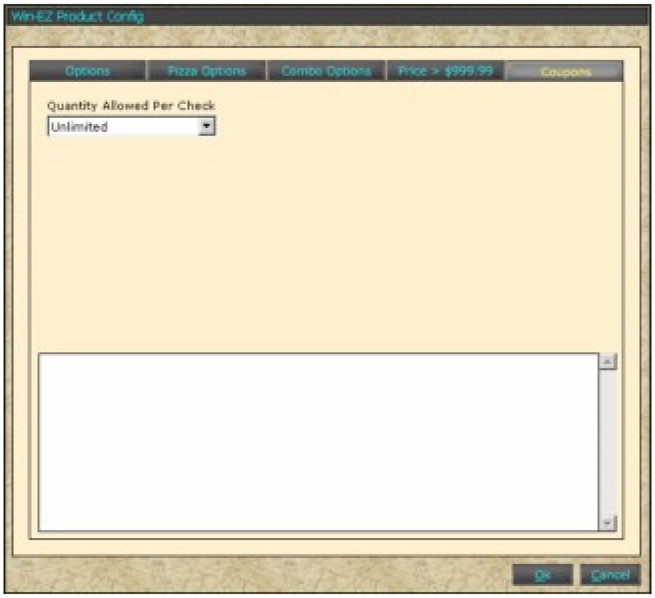
1.2.5.4.4 Price >



Item Priced at over $999.99:
Enter the price here with no decimals and make sure that Use Advanced Config is checked on the main item page and that Advanced Config Type is set to >$999.99 on the Item Advanced settings page under the options tab.

1.2.5.4.5 Coupons

COUPONS
This settings can limit how many coupons can be used on a specific item.



Quantity allowed Per Check:
Enter the number for each item in the data base considered to be a coupon. When a coupon is ordered the system will count how many other items there are with a setting greater that zero. If the number of coupons exceeds this setting the system will display a window reminding the user of the limit.

1.2.6 Menu Pages

Menu pages is WHERE items are seen by servers and bartenders. This is a 3 Step process. Two steps are done on the "Menu Page" while the last step is done in "Modules/ Button Editor". In Button Editor the menu page is attached to the screen in a specific place based on menu setup.

To attach an item to a menu page, a menu page first needs to be created. On the left side of the screen, use the a down arrow to choose an open menu page which is shown with an asterisk (*) and a number. Highlight the empty menu page and press "Edit". The Menu Page can then be named.

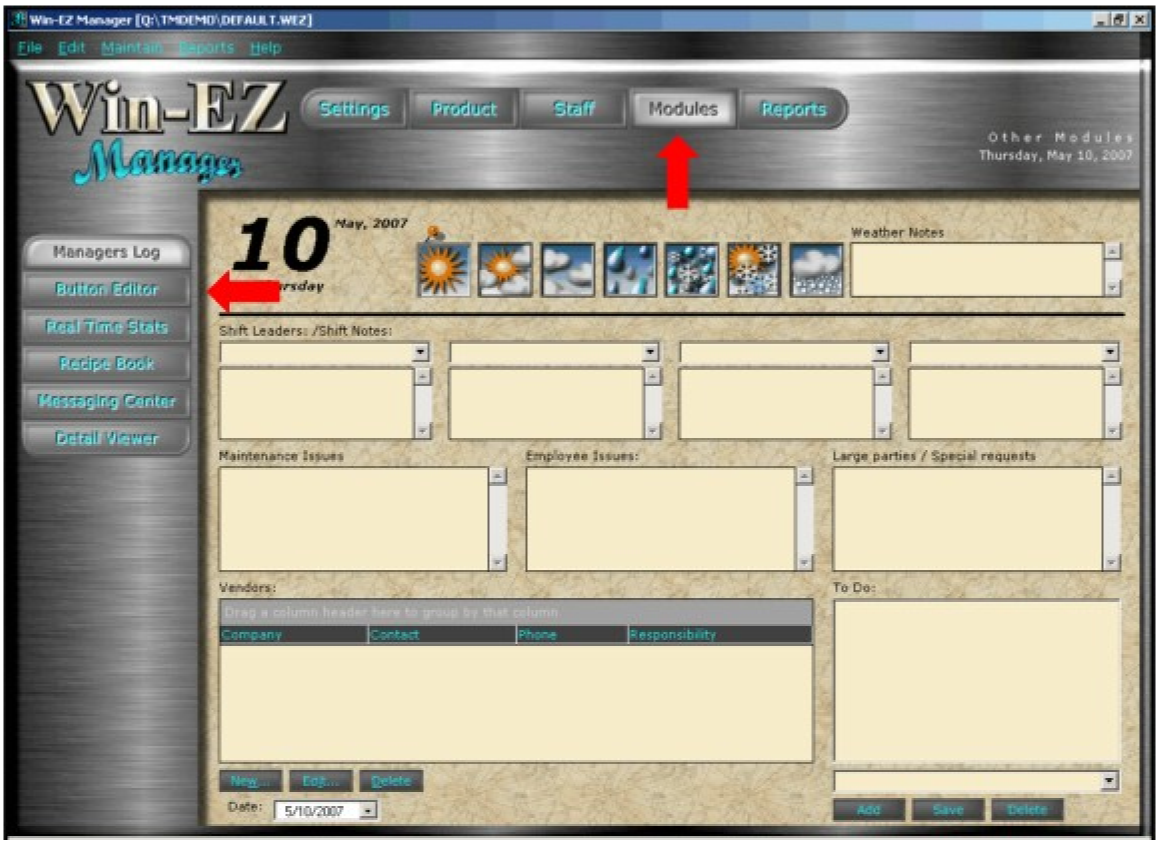
Once the Menu Page is named, the items previously created can be attached. To attach the item, find the item by name or number from the list on the right. "Double Click" the item to attach it to the menu page.

To Remove an item from the list, double click the item on the LEFT to remove it from the server screens. This will leave the item in the Product Item database list but servers and bartenders will be unable to order the item
NOTE: DO NOT delete the item from the Product item database list. This will cause the number to have sales listed on reports to an empty Product item.

The final step is to attach Menu Pages to the Point of Sale screen. This is done in Module/ Button Editor. Attaching the menu page is done only once and every item attached to the menu page will display on the Point of Sale screen after that.

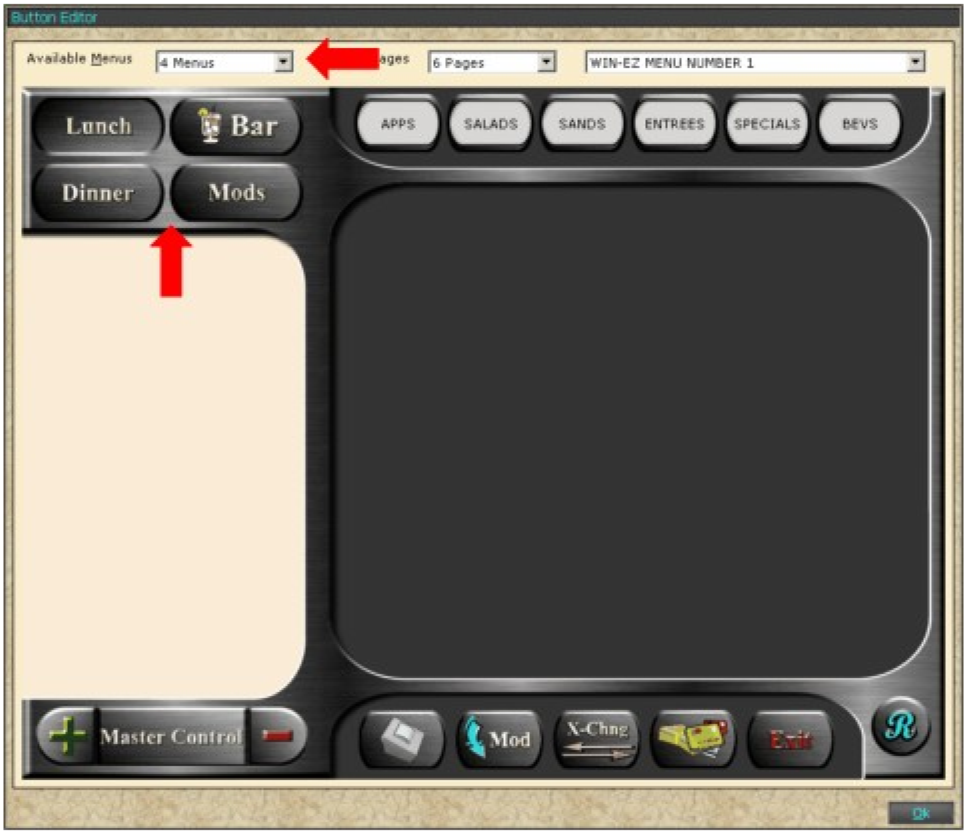
Button Editor is the set up of WHERE menus are placed. There are 5 Steps to Button Editor setup for menus.

Choose "Modules"



Choose "Button Editor"

Step 1
How many "Main Menus" there should be on the screen? There can be 4 or 6 "Main Menus". Use the drop down box next to "Available Menus" to open zones for 4 or 6 Main Menus

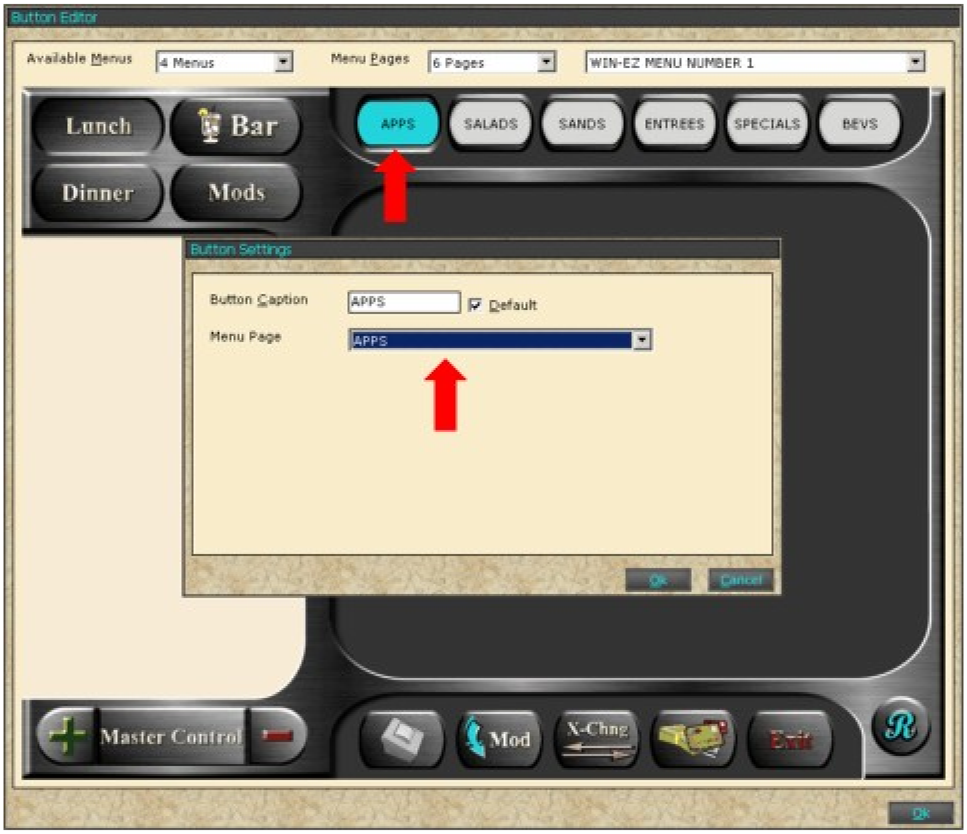


Graphics are designed for Lunch, Dinner, Food, Breakfast, Bar, Mods, Pizza, Beverage, Retail, Entree, Other, and Standard. If Standard is chosen any menu name can be entered. The Standard button background is blue while the others are the Win-EZ gun metal gray.

Step 2
Double Click the Main Menu. This will open a new box where "Win-EZ menu #1-9", "Mods" or "Bar" are assigned along with the graphic associated with that menu.

Step 3
Each Main Menu has the option of 1, 6, 12, or 18 "Menus" for each menu. The example below shows 6 "Menus" for Win-EZ Menu #1

Step 4
Double click on any "Menu" to assign the Menu page to that position.



There also a "Default" check box. When that box is check, the "default" menu will be the first menu page displayed when an order is being rung up. There can only be ONE default per Win-EZ Menu.

At this point, Win-EZ Menu #1 is complete. Continue each Main Menu as explained above.

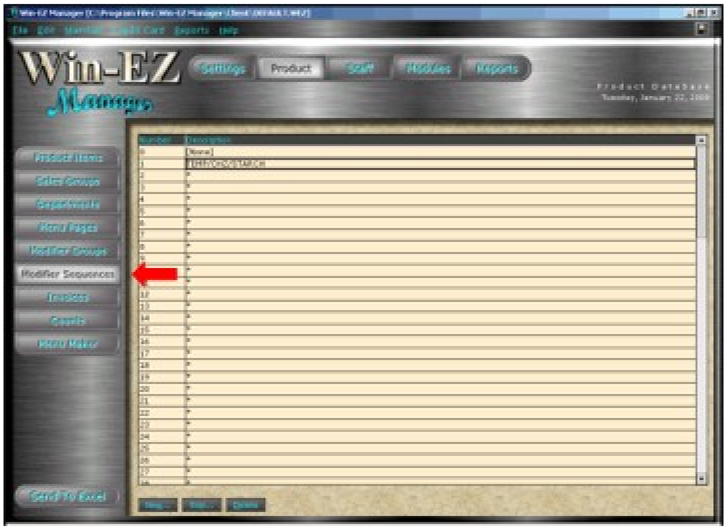
1.2.7 Extra Modules

Win-EZ Manager has several additional modules that may or may not be supported based on the version of POS software, or arrangement with your distributor.

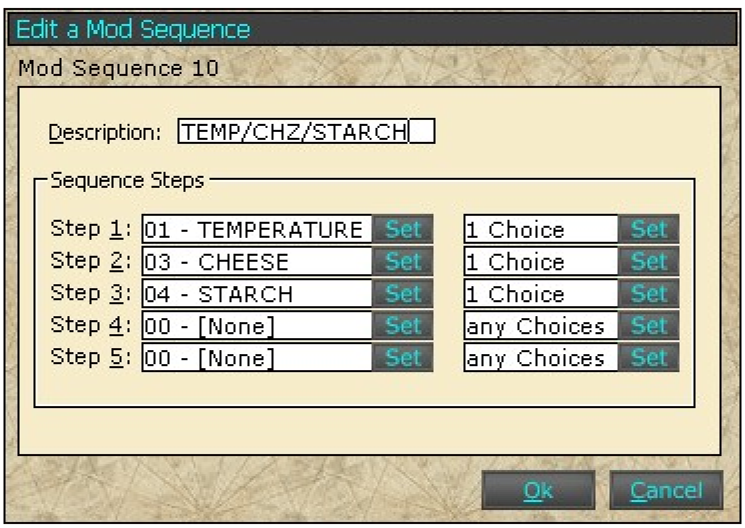
1.2.7.1 Sequences

Modifier Sequences are used instead of the Modifier Steps on each item. Instead of using "Modifier Steps" in the Product items Sequences are built with Modifier groups. The sequence is then attached to the item.

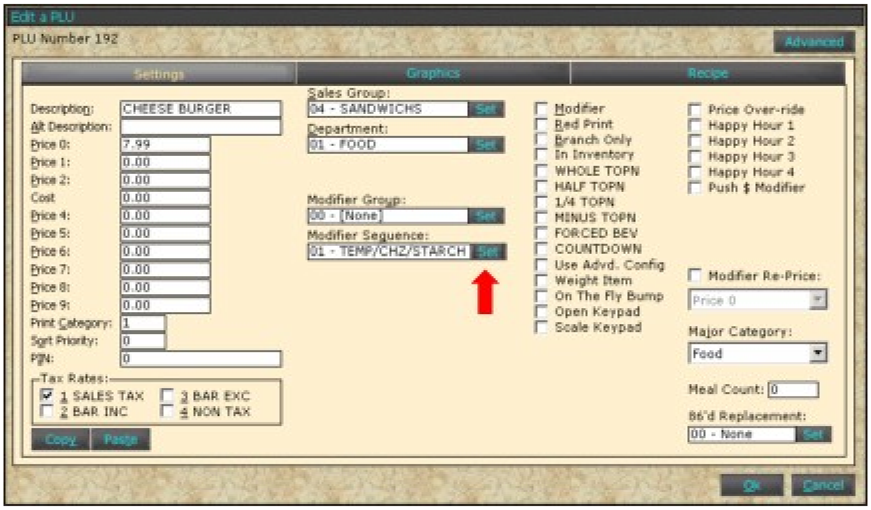
To Create a Sequence Press "Modifier Sequence"



Double Click an open Sequence and enter a Description. Sequences can be used on more than one item so building a generic sequence can eliminate steps.



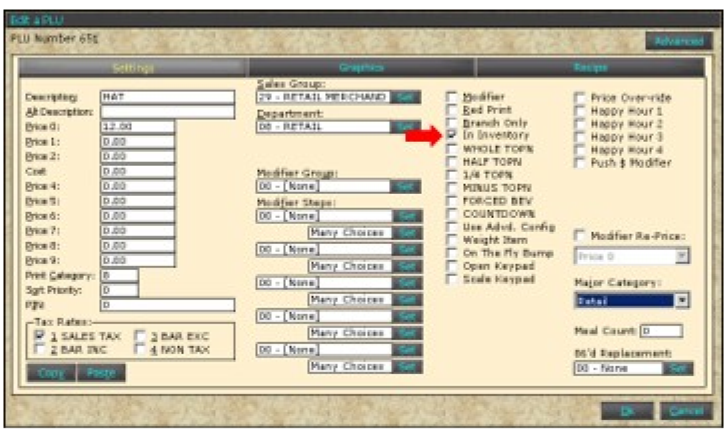
Once the sequence is built, attach it to the menu item by pressing "Set" and choosing the sequence needed.



1.2.7.2 Retail Inventory

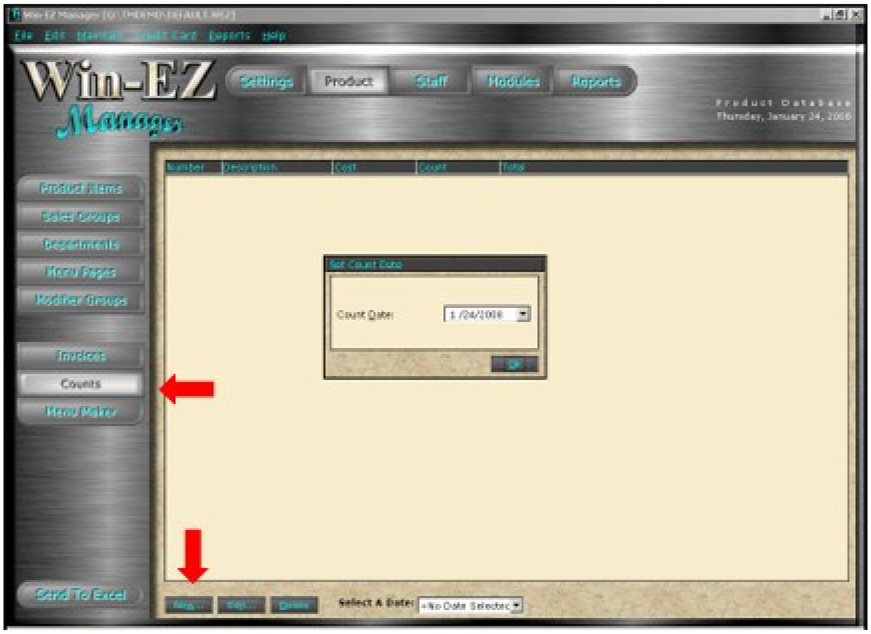
Retail Inventory is a simple One to One inventory program. One to One means there cannot be recipes attached to the item and it is counted as one item only.

To use Retail Inventory, every Product Item must be checked that it is an inventory item.

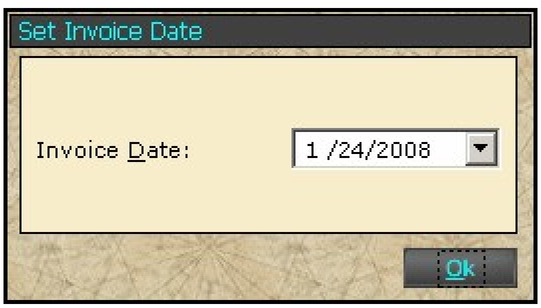


Start Count

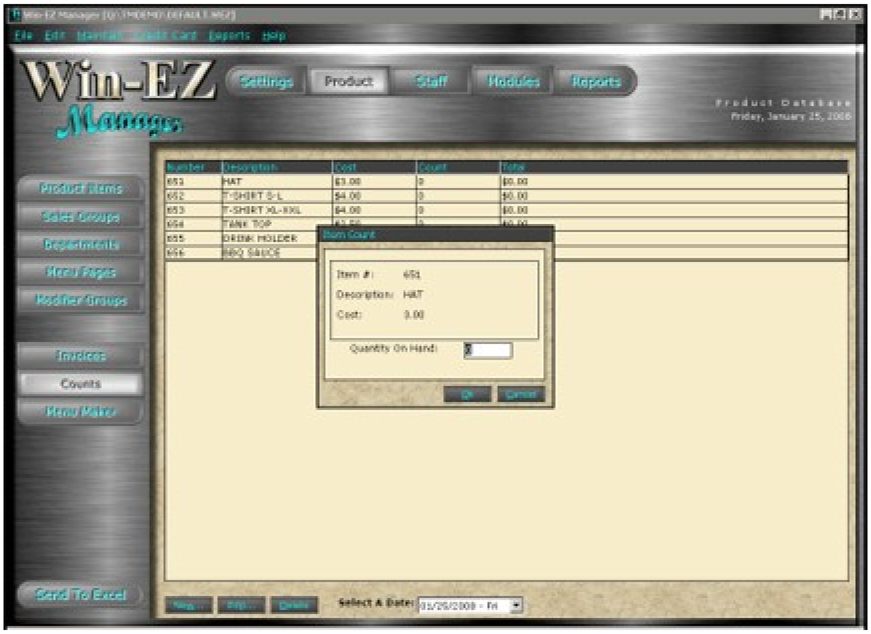
After each Product Item is marked with the option of "In Inventory" a starting count must be done. Each inventory period will have 2 counts, a starting and ending. To start a count select "Count" then "New" from the Product section.



Select the date for the invoice.

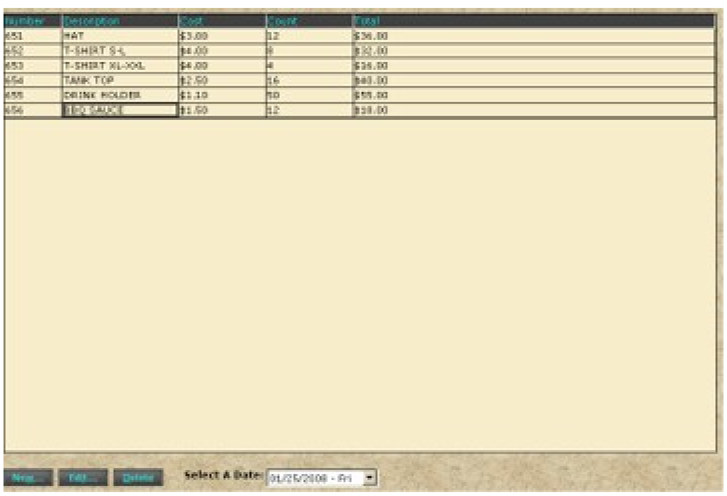


After selecting "New" a list of all Product Items that have "In Inventory" checked will display.



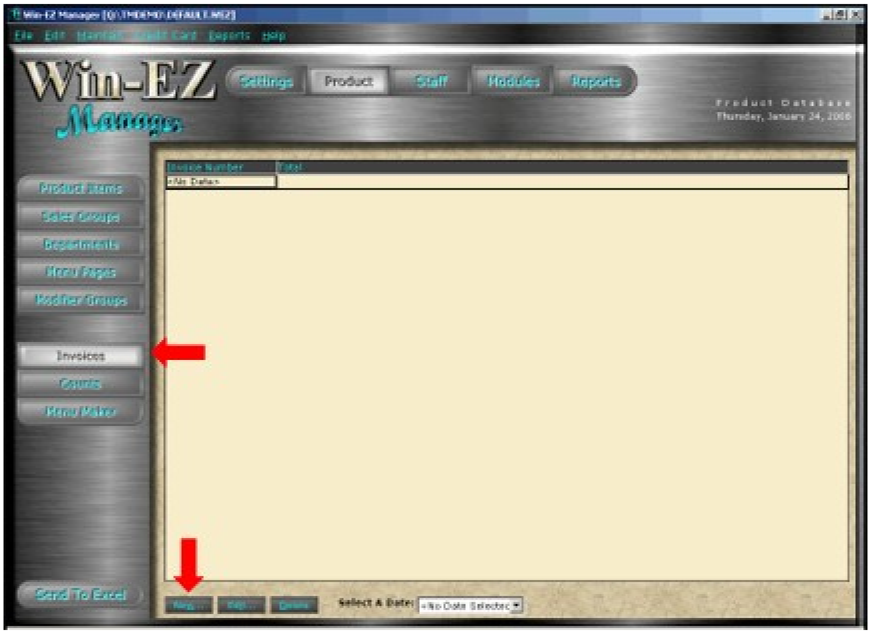
Choose the item to enter the count of the item, press "OK". Continue with the other items.

Once all the times have a count and a list will display with the item, quantity, cost and extended total for each item.

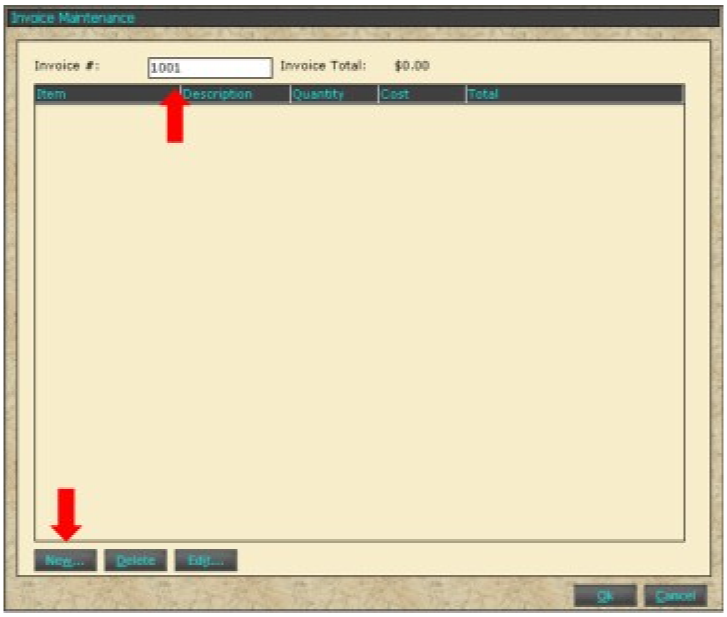


Number	Description	Cost	Count	Total
651	HAT	$3.00	12	$36.00
652	T-SHIRT S-L	$4.00	8	$32.00
653	T-SHIRT XL-XXL	$4.00	4	$16.00
654	TANK TOP	$2.50	16	$40.00
655	DRINK HOLDER	$1.10	50	$55.00
656	BBQ SAUCE	$1.50	12	$18.00

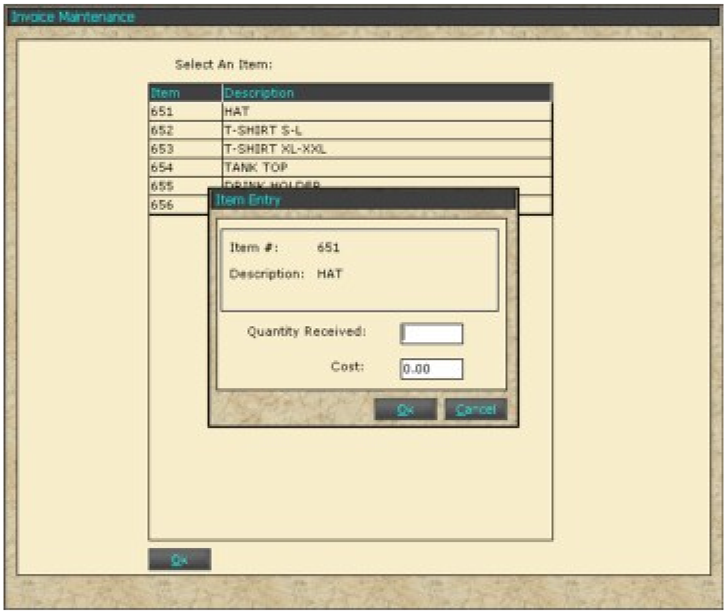
Enter Invoices:
Throughout the month Invoices are received which adds to the inventory.
To enter an invoice, select "Invoice" from Products and select "New"



Enter the Invoice number at the top for reference.

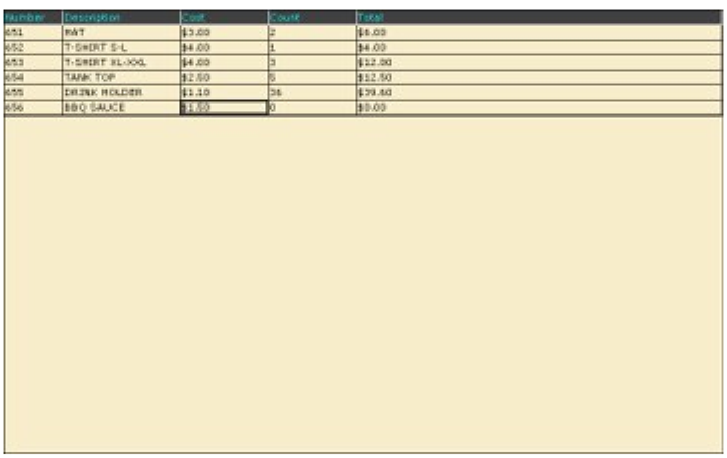


Choose the items that have been received into stock from the invoice. Change the price if the price has changed from the last invoice received.



NOTE: If invoices are not entered as they are received the counts and cost will not reflect true numbers at the end of the inventory period.

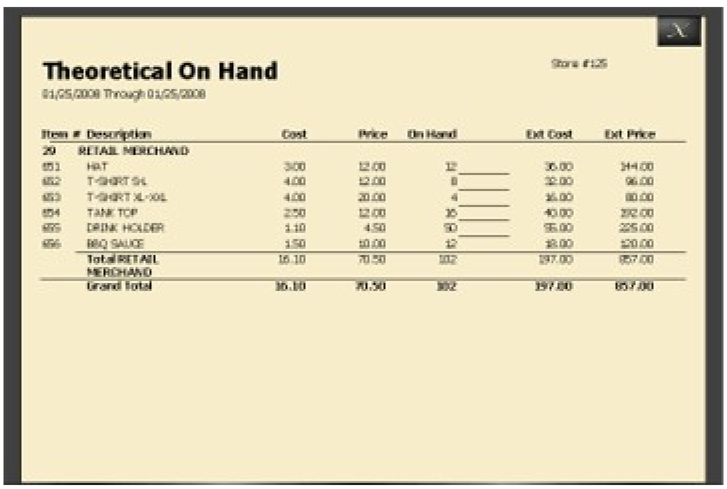
To End Inventory Period:
A end count must be entered for calculation of cost. To enter the END counts, press "Count" and choose the end count date. The Inventory list will display. Choose the item for the END count and enter the count for each.



With the **END** Count the inventory period is closed and reports are available for review.

For Reports choose Reports/ Inventory

A **Theoretical On Hand** report can also be printed to give to the employee doing the physical counts.



Theoretical On Hand

Store #125

01/25/2008 Through 01/25/2008

Item #	Description	Cost	Price	On Hand	Ext Cost	Ext Price
29	RETAIL MERCHAND					
651	HAT	3.00	12.00	12	36.00	144.00
652	T-SHIRT S-L	4.00	12.00	8	32.00	96.00
653	T-SHIRT XL-XXL	4.00	20.00	4	16.00	80.00
654	TANK TOP	2.50	12.00	16	40.00	192.00
655	DRINK HOLDER	1.10	4.50	50	55.00	225.00
656	BBQ SAUCE	1.50	10.00	12	18.00	120.00
	Total RETAIL MERCHAND	16.10	70.50	102	197.00	857.00
	Grand Total	16.10	70.50	102	197.00	857.00

The remaining reports are used for cost, variance and review of purchase.

1.2.7.3 Menu Maker

The Top Control Panel

The Prev and Next Buttons: Used for scrolling between multi-page menus.

Fit: This will resize the menu to fit the screen, width wise.

- & + magnifiers: zoom in and out on the current menu.

2 Pages: Used to view 2 pages laying next to one another. When clicked the button will change to "1 Page", click this to return to the original format.

Copy: Use this to make a copy of a special menu (like the right click and copy function) and then go to another program (exp. paint or word) and from there right click and select paste.

Print...: Used to print the current menu.

Done: Used to exit Menu Maker.

The Bottom Control Panel

The Menu Title Button(Empty): This button, when Menu Maker is started it will "empty". By creating a title for the menu, using the menu button, the menu title will appear here. It will store up to 4 menu's. Use this button to move through the created menus.

The Set PLUs Button: Used to add and delete items from the menu. Clicking this button will open a small product screen directly to the right of this button, scroll up and down to pick the items to add to the special menu. Click on the box (a check mark will appear in the box) to add the item, clicking the item will not add it. To take an item off, click the box again to remove the check mark. To close the product screen click on the Set PLUs button again. The menu will use the Description field above the picture (if there is a picture) or the large white box (if there is no picture) as the name of the item. If the Description field is blank, then the menu will show the first item description. (The Description is 200 characters long as opposed to the 17 characters of the product item description)

The Border Button: Used to choose what border to have around the menu. Each time "border" button is clicked it will cycle to the next border. To have no border, set the button to Border: 0.There are 14 public domain borders included with this release, but the system will support 99. These borders are in C:\program files\Win-EZ Manager\Borders. Borders can be in .bmp or .jpg format, and must be named "borderxx.bmp / .jpg" where xx = 1 – 99. if a .bmp is found with the filename, the system will not look for a .jpg with the same filename.

The Price button: Used to set what prices will show up. To change the setting, click on the Price button It will reflect what prices that have been entered into each individual item. So if happy hour is set up with the regular prices set under price: 0 and the happy hour prices under price: 1, design a happy hour menu by selecting price: 1.

The Description Button: Used to choose between showing the Chefs description or the Nutritional description. To change the setting, click the button. These descriptions are taken from each individual Product Items.

The Pics Button: Used to turn the pictures on or off. A picture must be imported to the Product Item for it to show up. If there is no picture assigned and pictures is turned, on it will still indent the menu items as if a picture were there. This will require that the dealer add a sub folder to the application folder (C:\Win-EZ\Client\Plupic) called "plupic". Pictures should be in a .bmp or .jpg format, and be named with the PLU Number (i.e. 1.jpg , 1234.bmp). Pictures size should be approximately 3.7 in wide x 2 in high (269x142 pixels) Win-EZ manager will resize the view area to match a smaller picture and move the recipe entry box to fill the space.

The Logo Buttons: The Left Logo Button is used to change the justification of the logo. L = Left,R = Right or C = Center. The Right Logo Button is used to cycle through four logo's or turn the logo off. Logos are in .bmp format, and should be placed into the "borders" folder with a name of "logox.bmp" where x = 1 - 4.

The Rest Button: Used to enter the name of the restaurant under edit and set the justification of the name on the menu. L = Left,R = Right or C = Center. The name of the restaurant does not have to be entered.

The Menu Button: Used to name the menu with edit and set the justification on the menu. L = Left,R = Right or C = Center. The menu name will not show up into the menu title button until the system cycles through the 4 menu titles or Menu Maker is exited and come back in. .

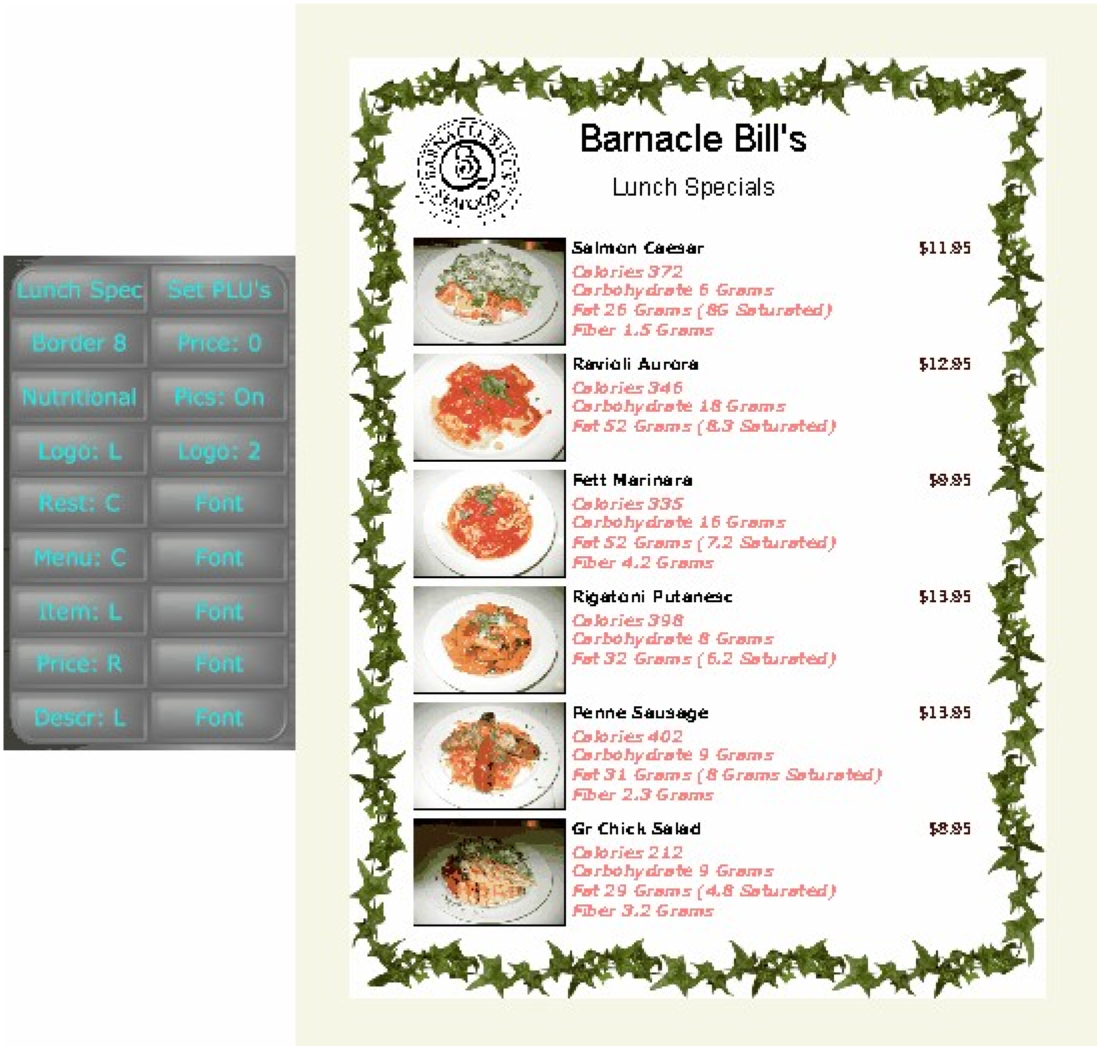
The Item Button: Used to determine the justification of the menu items on the menu. L = Left,R = Right or C = Center

The Price Button: Used to set the justification of the prices on the menu. L = Left,R = Right or C = Center

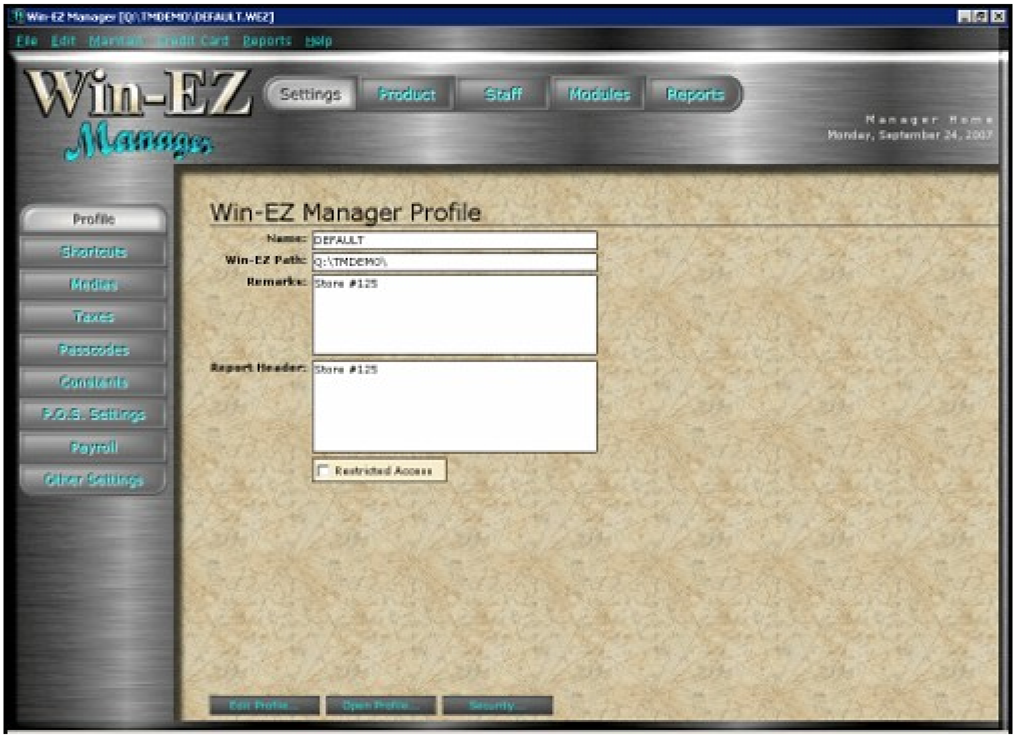
The Desc. Button: Used to set the justification of the item description. L = Left,R = Right or C = Center

Font: Used to change the corresponding buttons font, font style, & the size as well as the color.

Here is an example of a menu and it's settings.



1.3 The Settings Button



Profile: Contains general settings for the user profile, specific computer, and site application, along with user security settings.

Shortcuts: This is were program shortcuts can be created, helpful in the cases where closing the program are locked but you still want Managers to have access to certain programs (ie: Word, Excel, etc.).

Taxes: This is where the sales tax percentage is set.

Pass codes: This will display codes required for manager functions.

Constants: This will display receipt info as well as a few other control features.

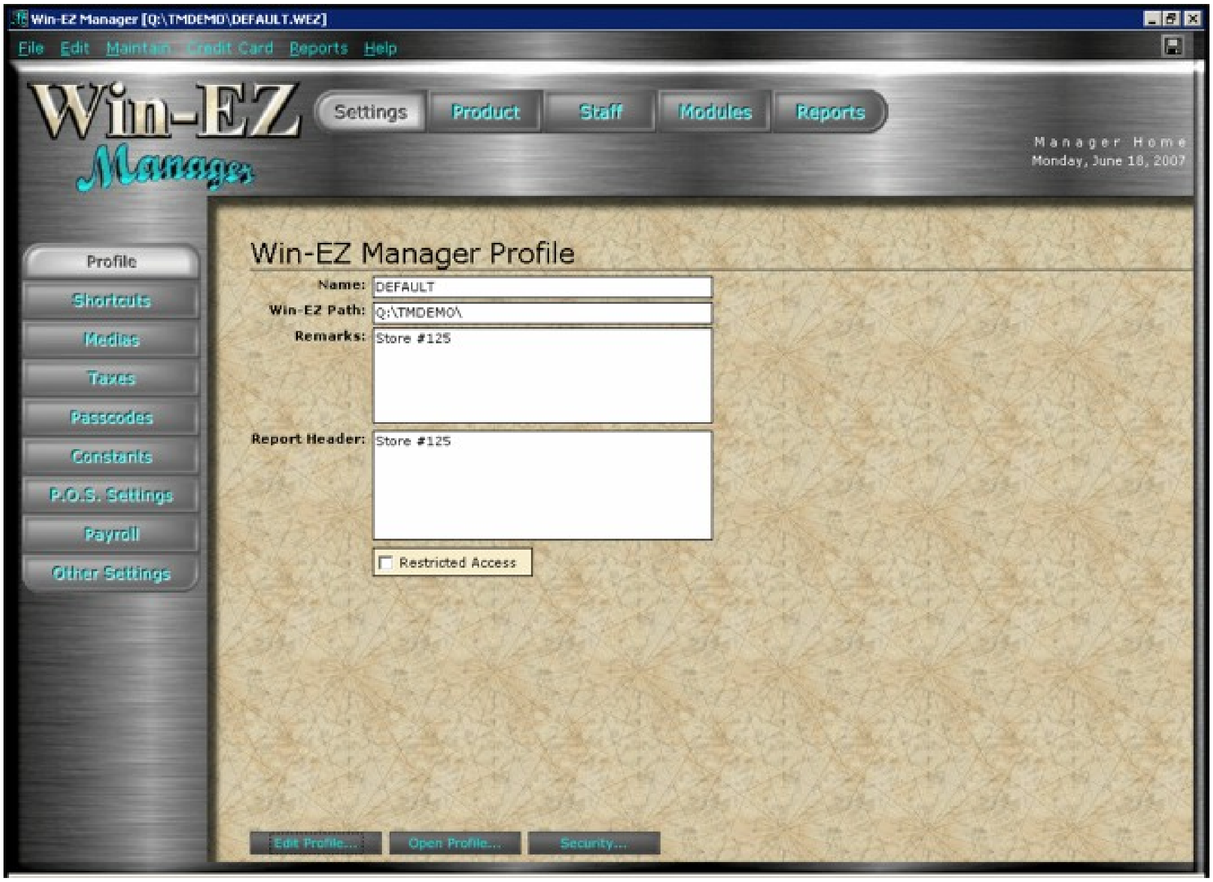
POS Settings: These settings are Global configurations for terminals, table service options, Happy hour configurations, Media configurations, Counter service, delivery, and pool table options.

Payroll: Used to set global payroll settings.

Other Settings: Contains other miscellaneous settings.

1.3.1 Profile

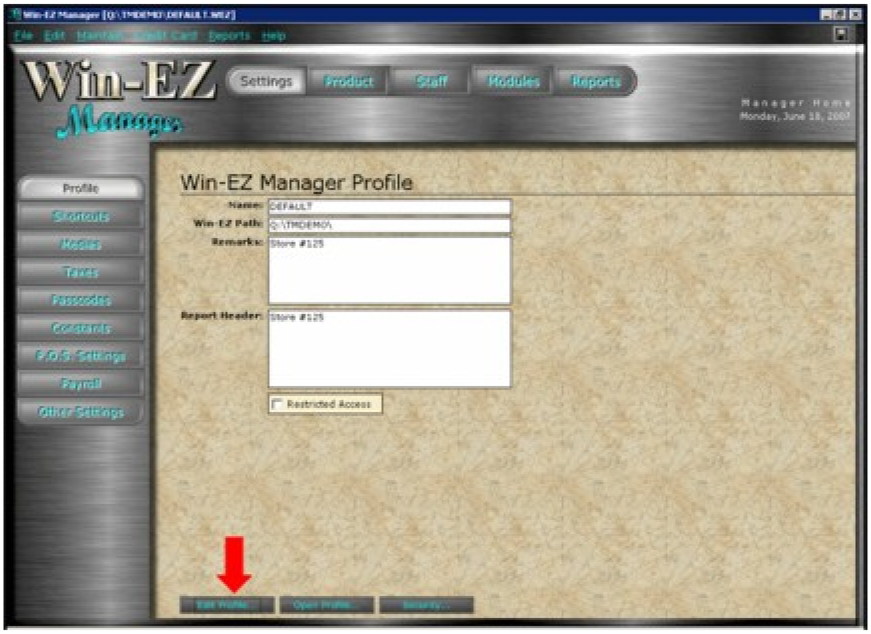
Profile shows general information regarding the location of the restaurant. Remarks and Report Headers are entered here.



1.3.1.1 Edit Profile

Each location is designated with a profile. In an corporate environment with corporate polling, each profile represents a different location. The Tabs are for settings specific to each location.

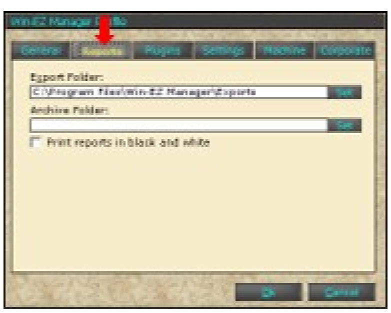
To make changes, press "Edit Profile" at the bottom of Settings Page.



1.3.1.1.1 General

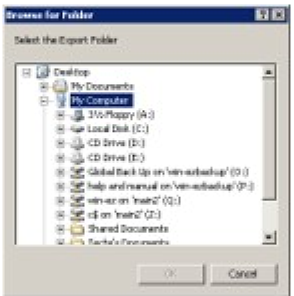
Enter any information to profile and report section to distinguish the location such as name, address, store number.

1.3.1.1.2 Reports



Export Folder
Win-EZ has the ability to export reports to a different format such as Excel and Adobe. When a report is chosen icons are displayed if that report can be exported. If export option is chosen, a box is displayed to name the report. The report will then be exported to the folder designated in "Edit Profile/ Report section. (See above).

To set where an exported report will save press "Set" to bring up a Windows "Browse for folder" window. Choose where the report should be exported.



Archive Folder
This allows for Legacy reporting to be moved to Win-EZ Manager. This feature will be phased out in later releases.

Print reports in Black & White
If using a non color printer, this option will change any reports with color (blue or red) to black print.

1.3.1.1.3 Plug Ins

This will give a list of all Report programs available to add to Win-EZ Manager, a description of what the report is and an installation button. If a new version of software is released with additional reports available, the reports will need to reinstall if there are new reports available. While this is usually done during upgrades, there are times special reports are added and the plug in need to be reinstalled. Please contact an authorized Win-EZ dealer for any questions or report problems.

1.3.1.1.4 Settings

The settings tab contains setup of the Win-EZ Manager program.

Price Level 3 Label=Cost
When programming menu items there are 9 price levels, with Price level 0 being the default price. Price level 1-9 are used with happy hour or timed events.
If Win-EZ inventory is being used, turn Price level 3= cost on. The field in Product item changes to "cost". If the cost of the item is entered into that section, reports in the Reports/ Inventory section will reflect the cost of items. The only other report that contains cost information is Reports/ Product/ Theoretical Cost.

Use Available Dates
If "Use available dates" is turned on, all dates with report information will show as a drop down list in the report section, other wise a calendar will display for report date choice. Note that with the calendar control, it is possible to select a date that contains no report data.

With "Use Available Dates" turned on

With "Use Available Dates" turned off

Start up on Destination
This setting allows each site to chose there the Win-EZ program starts when opened. The choices are: Reports, Manager Log or Shortcuts. See each section to determine the best start up page.

Import Recipe by Number
This feature allows for numbers to be shown when importing a recipe from Modules/ Recipe book to the actual product. See Module for more recipe information and Product List for more import information.

Report Group Creation Time
The report group feature allows for the creation of a group of exports at a given time each day. These exports will be created at the time specified here.

Start Manager For Exports
In order to create the Report Group Exports, Win-EZ Manager must be running. If this option is selected, then Win-EZ Manager will be started automatically 5 minutes before the scheduled report group time.

Store Number
Is used for corporate polling information. If using Corporate polling, a store number is entered so it sends the daily information to corporate correctly, and to help identify a store for Enterprise Reporting features

Store Name
Used to identify a store with a friendly name in the emails that are sent by the Report Group Export feature.

Loyalty Card:

The following settings control Royalty Rewards and Diamond Rewards settings.

Terminal ID, Merchant ID, Store ID, and Password
Enter the date provided by the loyalty provider

Platform
Select the platform that the loyalty provider uses.

Use Gross Sales
If selected Gross Sales will be transmitted to the provider, otherwise Net Sales will be used.

Real Time Stats: use gross sales
With this feature turned on, all sales numbers in Modules/ Real Time Stats are displayed as gross numbers, not net numbers.

Enable Online Ordering
Enables the Online Ordering module. The module must be licensed to work.

Accept Future Orders
If enabled Online Orders that have dates in the future will be saved and then recalled on the day that they are to be made. If disabled all orders will be placed immediately.

1.3.1.1.5 Machine

This section details how the software acts with other machines or by itself.

Default Profile
This is set to list if more than one profile is being used on the same machine (corporate option). For a stand alone location, it is usually set to the Win-EZ default. When Win-EZ is launched, it will automatically start at the local store. If it is in a corporate location, a list will show all the locations for the user to chose the profile needed.

Profile Folder
This feature will auto set when "File Server" is the "Machine Type". This is the path the Win-EZ services looks at when Win-EZ is running. This is set up by the dealer.

Internet Access
If the machine does not have Internet access, this should be unchecked. With the section checked on,

it allows for services to automatically access the internet for updates and releases.

Back Up Time
Win-EZ automatically backs up information on a daily basis for safety and security. The time is considered "End of Day". Any transactions preformed prior to back up time will be on the previous days sales.
NOTE: This does not substitute data backup for data recovery if catastrophic hardware failure occurs. It is the sole responsibility of the owner to backup and take information off premise for safe keeping. For more information on backup procedures, see section "Settings/ File/ Backup".

Machine Type
At time of installation, the machine is designated as one of the following: File Server, Back up Server, Auxiliary Manager, Corporate Sever or Dealer Server. This setting determines the file structure, backup and file storage of local profile. This is setup by the dealer at time of install.

Read Only
If Machine type is anything other than "file server" the file may not be allowed to be changed from a different machine. To determine if files can be edited from other locations, ask the dealer for recommendations.

Additional Files to Backup
This feature allows for up to 5 additional files or folders to be backed up during the back up procedure described above in "Back Up Time". To choose additional files, use the "set" button to browse to other folders on the computer.

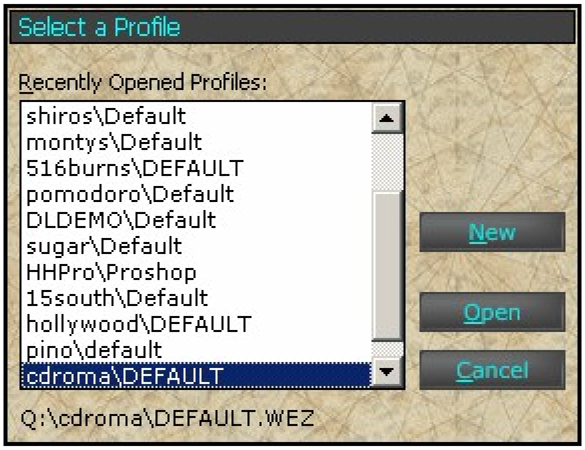
1.3.1.1.6 Corporate

If "Corporate" consolidation is being used, set up is done here.

Set up is generally done by an authorized dealer. A key is "imported" to allow for transfer time to be enabled. A "Site ID" is also required to signify which location is transmitting information to the corporate store.

1.3.1.2 Open Profile

This will give a list of all available profiles. If more then one profile is listed, take care to open the profile that is needed. This feature is generally used for corporate environments or for authorized Win-EZ Dealers.



1.3.1.3 Security

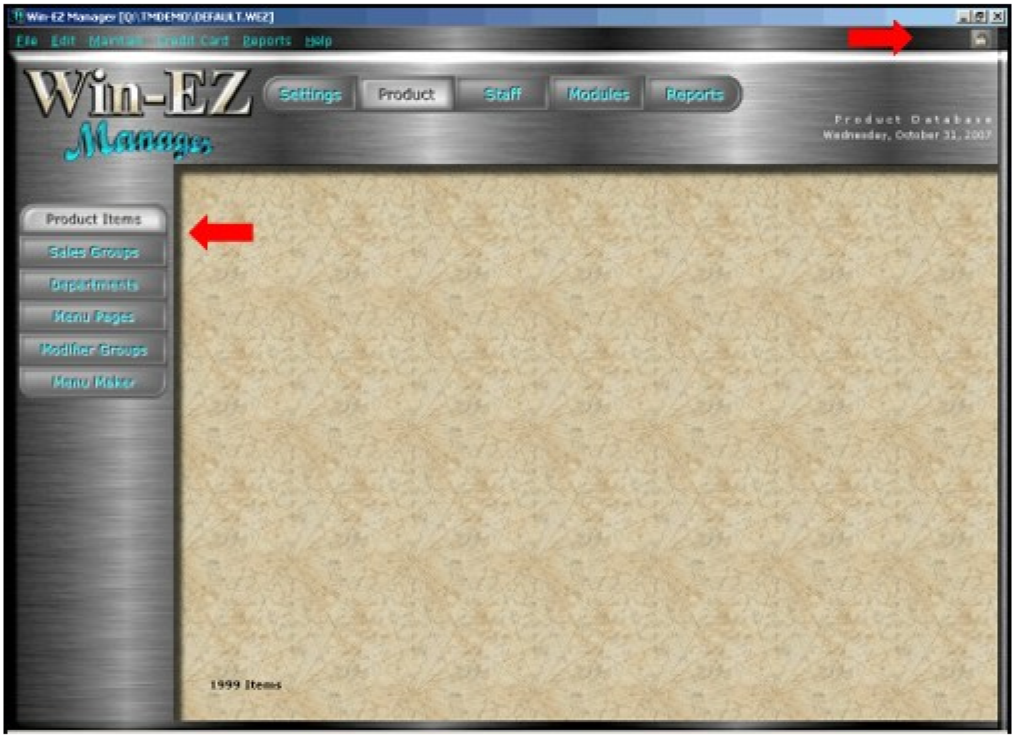
This is where owners or managers restrict the use of Win-EZ from users not authorized to see the entire program or specific parts of the program.

Checking the "Restricted at startup" button will set restrictions when the program is launched.

The "Password to un-restrict" field is where the password is added or changed for access to the program. By setting a password, the system can be "locked down" from unauthorized users.

The "Privileges when Restricted" field allows the owner or manager to designate who and what is authorized to be viewed or edited without the password.

If unauthorized users access the system by leaving the box UNCHECKED, the user will be unable to access to a certain field.



To unlock restriction, click on the  icon at the top of the page. Enter the security password.

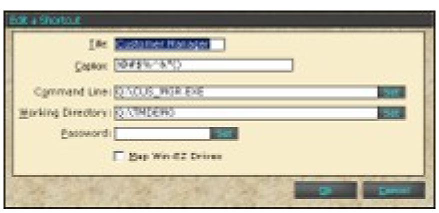
1.3.2 Shortcuts

Shortcuts is designed to make navigating to other programs easier. The most common use of "Shortcuts" is to launch external applications.

If the extra module is installed, by highlighting the program name and selecting the "Execute" button, it will launch the program. Double clicking on the name of the program will launch it also.

To create, modify or delete a short cut Press "Customize". There will be a list of the created shortcuts where they can be modified by clicking "Modify".

Create a new shortcut press "Add".



Enter a name for the shortcut which will show up on the main shortcuts screen.

There is an option to add a caption which will be a detailed description of the title and will show up below the title.

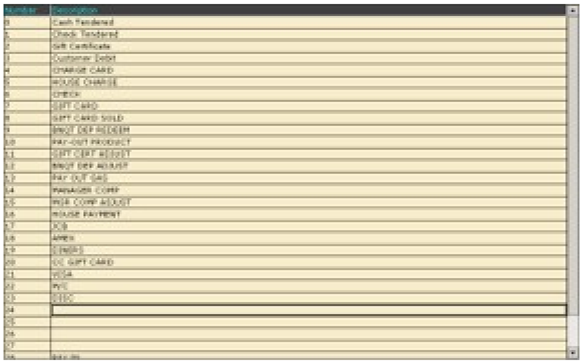
The Command line will give a box to select the program for the shortcut.

Set the "Working Directory" if setting up a DOS shortcut.

Set a password if access is limited.

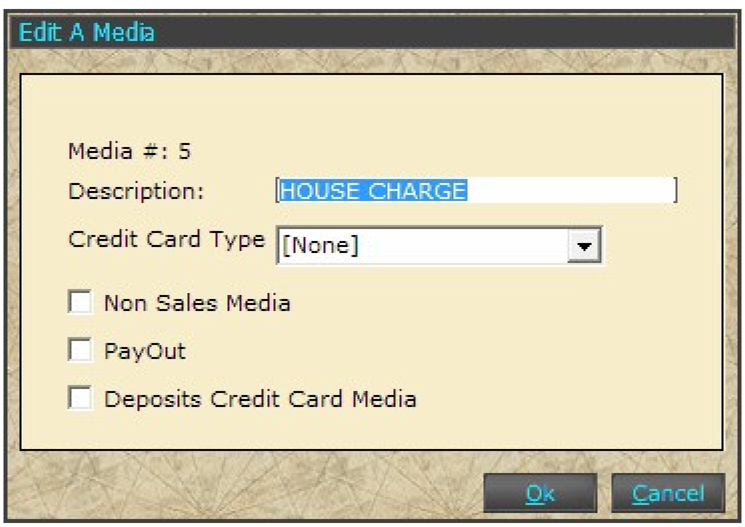
1.3.3 Media

The media section has multiple uses and is generally a Win-EZ authorized dealer set up. Some line items (1-4) can not be changed because they are hard coded in the system.



Lines 5-30 can be edited for any changes needed in reports and POS.

To Edit a line, double click in the line, or select the edit button.



The description line can be changed for reporting purposes.

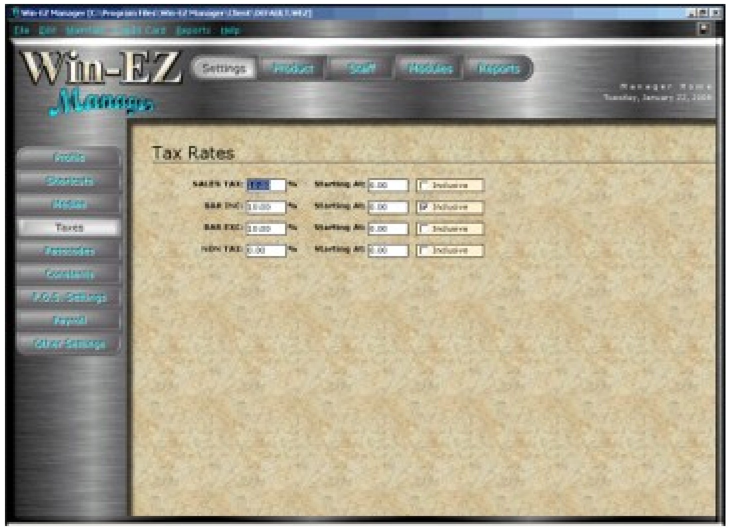
Credit Card Type is used to sync the Media in POS to pre configured Credit Card types.

Check the "Non-Sales Media" if the item is needed as a separate line item in reports.

If "Payouts" are being used the payout description can be added or changed. If a new payout is needed, check the box for "payout". This will add the new payout to the list when a payout is performed by an employee.

Selecting the "Deposits Credit Card Media" option will add the media to the Credit Card list in the Deposit feature.

1.3.4 Taxes



Sales Tax: Enter the tax rate that applies

Starting At: Displays the minimum dollar amount that a menu item or guest check will be charged that tax rate. If tax should always be applied then set the amount to 0.00.

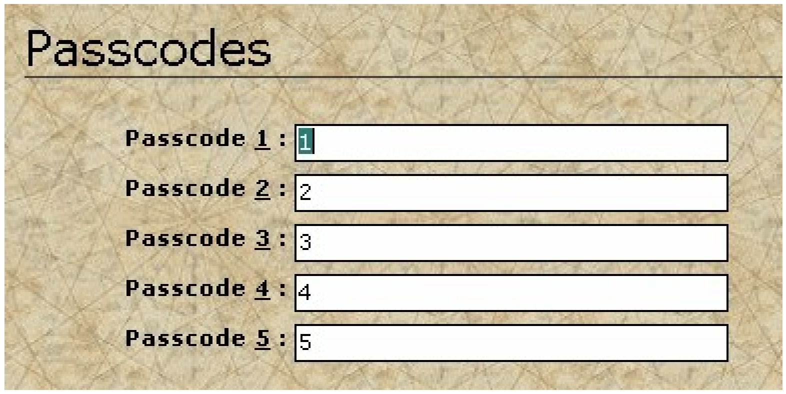
Inclusive: Set Inclusive tax to the correct tax rate. If Inclusive/ Exclusive and/ or Smarter Tax is being used the rate must match the current tax rate. Inclusive Check Box: A check should only be in the "INC" line

Exclusive tax: Set exclusive tax to the correct tax rate. If Inclusive/ Exclusive and or Smarter Tax is being used the rate must match the current tax rate.

To set Inclusive/ Exclusive or Smarter Tax, refer to "Staff/ Job Codes/ Advanced" for more explanation and set up.

Non Tax**:** leave this field at 0.00 to reflect a non taxed item such as a gift certificate or gift card.

1.3.5 Passcodes



Up to 5 pass code numbers (security codes) are stored in these fields. These are used to access sections of the program designated for manager use only. Using any one of the five will gain access to areas in Win-EZ that can affect money (voids, comps, etc) .

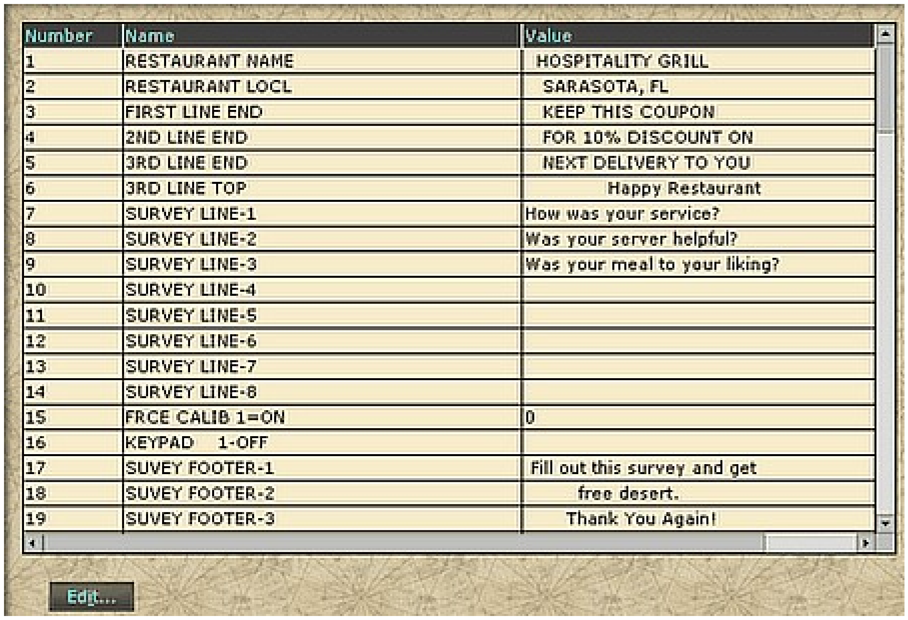
Each owner/ manager can have a separate passcode or the whole staff can use only one passcode but never leave a passcode empty. This allows for full access by unauthorized employees.

NOTE: Change passcode often. Employees do tend to see the numbers being used. For Security purposes using "Manager cards" with keypad entry may be an option. See POS Settings/ Manager Swipe.

When manager cards are assigned (see POS Settings/ Other functions/ Assigning Security Cards) a receipt will print when the card is assigned. By entering the numbers into the Passcode fields, this will allow access into security areas without having to enter a passcode.

REMEMBER: When using manager cards, choose what function is being done (recall a check) then slide the card.

1.3.6 Constants



Number	Name	Value
1	RESTAURANT NAME	HOSPITALITY GRILL
2	RESTAURANT LOCL	SARASOTA, FL
3	FIRST LINE END	KEEP THIS COUPON
4	2ND LINE END	FOR 10% DISCOUNT ON
5	3RD LINE END	NEXT DELIVERY TO YOU
6	3RD LINE TOP	Happy Restaurant
7	SURVEY LINE-1	How was your service?
8	SURVEY LINE-2	Was your server helpful?
9	SURVEY LINE-3	Was your meal to your liking?
10	SURVEY LINE-4	
11	SURVEY LINE-5	
12	SURVEY LINE-6	
13	SURVEY LINE-7	
14	SURVEY LINE-8	
15	FRCE CALIB 1=ON	0
16	KEYPAD 1-OFF	
17	SUVEY FOOTER-1	Fill out this survey and get
18	SUVEY FOOTER-2	free desert.
19	SUVEY FOOTER-3	Thank You Again!

Double clicking on any line will open a screen to change the text for that line.

1.) Restaurant Name: This will be located on the top of the guest check.
2.) Restaurant Locl: This will be right below the Restaurant Name at the top of the check.
3.) First Line End: This will be located at the bottom of the guest check.
4.) 2nd Line End: This will be located at the bottom of the guest check.
5.) 3rd End Line: This will be located at the bottom of the guest check.
6.) 3rd Line Top: This will appear below the Restaurant Location line at the top of the guest check.
7. - 14.) Survey Line: Survey has been added to POS Settings/ Receipt Printing Options/ Customer Survey
15.) FRCE CALIB 1=ON: Change this between 1 and 0. If 1 is "ON" when a terminal is rebooted it will force the person to calibrate the touch screen. If 0 is "OFF" then a reboot of the terminal will go straight to the log in screen.
16.) This will turn Keypad on or off with 1 = off and 0 = on.
17. - 19.)Survey has been added to POS Settings/ Receipt Printing Options/ Customer Survey
20. - 21.) This will display a message on the pole display when the pole display is not in use.
22. - 28.) Settings for Texas scan drivers license verification system.
29.) 4th Line on receipt footer.
30.) Enter the Product Item number of the Gift Card.
71-78.) This sets the pole displays idle message by terminal numbers.
97.- 99.) Win-EZ dealers information will be placed here.

1.3.7 POS Settings

This section will cover all the settings to turn features on and off and set their parameters. Think of this as the central command center that works in conjunction with the master control and other functions commands. The categories have been split into many different tabs to make it easier to navigate but the main principle is that there are three main categories of settings the first two of which are covered in this section; global, by terminal and by job code. This provides a great deal of configurable power to the system because no two restaurants operate the same.

To configure settings open Win-EZ Manager

Press "Settings" on the top then "P.O.S. Settings" on the left of the screen

From this screen choose the section to be configured.

1.3.7.1 Global

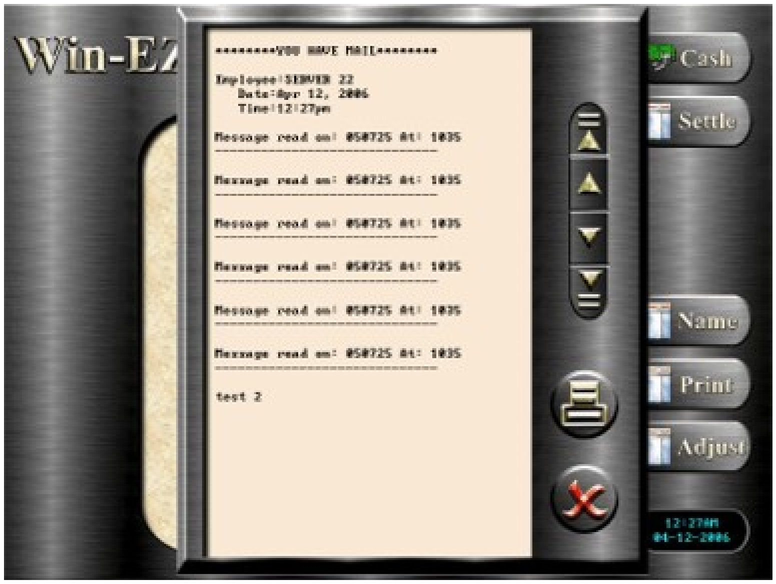
Global Settings effect the system as a whole, while "Job Code Settings" effect specific job duties. The following will explain each tab in Global Settings.

1.3.7.1.1 Global Options

Win-EZ Start Page:
This will change the system back and forth between Win-EZ and the special edition for Denny's.

Assign Member:
Will allow a member tracking number to be assigned when opening a new table.

Forced Email:
This feature will force employees to check their email on clock-in and clock-out.



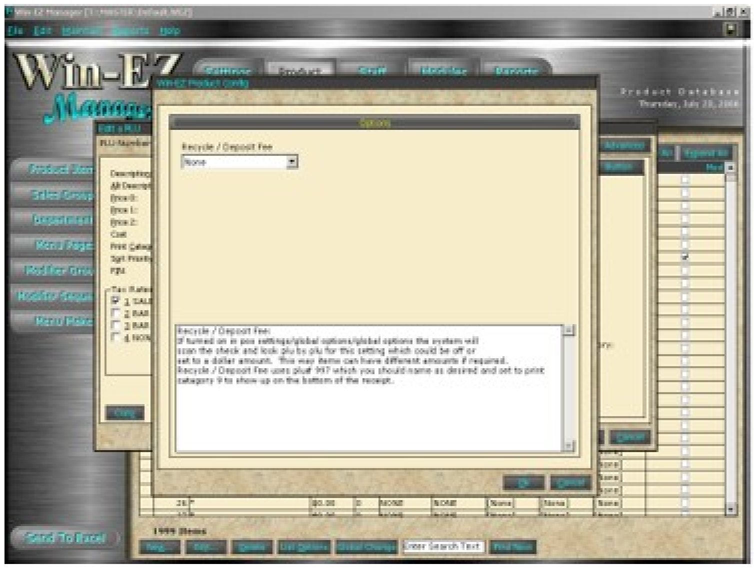
Old Open Table Report Minutes:
This report is available by entering a manager number and selecting "Reports" on the main sign-in screen. It will show a list of all open checks that are older than the number of minutes entered into this field. This is useful for finding walkouts and slow to turn tables. It is a number field, based on when a table is considered "old". Enter the time in minutes.

Press "Old Open Table". A list of all tables that have been opened longer then the assigned time will display

Recycle / Deposit Fee:

If turned on the system will scan the check and look item by item for the setting in product database/advanced for whether that item is off or set to a dollar amount. This way items can have different amounts if required. Recycle /Deposit Fee uses Product Item #997 which you should name as desired and set to print category 9 to show up on the bottom of the receipt. Deposit/ Recycle Fee is used when purchasing bottles or cans in states where there is such a fee.

After pressing "Advanced" a window will appear to attach an amount to each item.

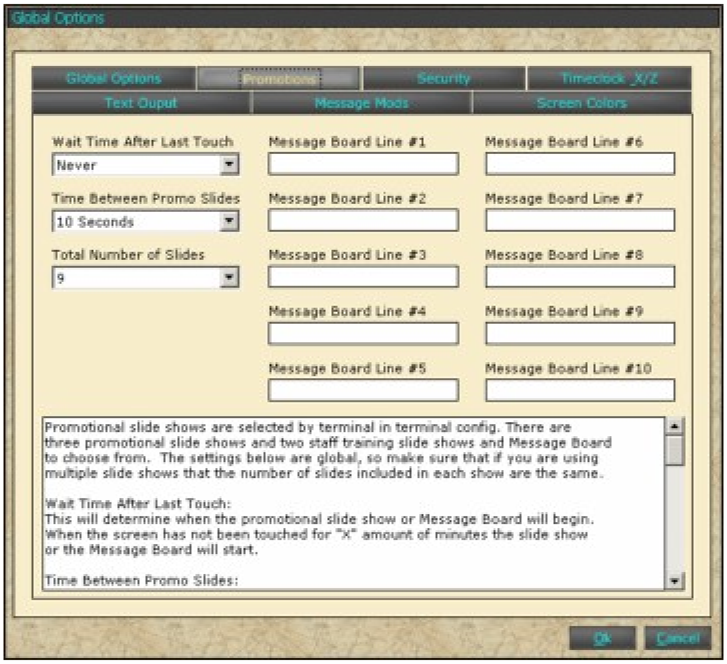


Assign Lodge Member:
This will allow the user to select a Lodge member number and lodge number on start of a new table or bar tab. This will use the customer database and can be turned on in POS Settings/Global options. The member number will be closed with the check and retained in the customer data base. The member number must be 4 digits or it will conflict with house charge which is number 1-999.
The customer name field is used for the lodge number it too is 4 digits and will be cleared when closing the check to eliminate confusion when pulling a customer list. To aid in tracking down lodge numbers for walkout members the lodge number is written to the control information upon check closing and can be obtained by producing a closed check report and looking and the bottom the check.

Itemize Comp Report:
This will write a full detail of items to the comp report when a dollar check comp or a percentage check comp is performed. (Note this will create a very long report if turned on.)

1.3.7.1.2 Promotions

Promotional slide shows are selected by terminal in Terminal Config. There are three promotional slide shows and two staff training slide shows and Message Board to choose from. The settings below are global so make sure that if multiple slide shows are being used that the number of slides included in each show are the same.



Start Slide Show In:
This will determine when the promotional slide show will begin. When the screen has not been touched for "X" amount of minutes the slide show will start.

Time Between Promo Slides:
This is the amount of time between slides.

Total Number of Slides:
How many slides are in this slide show. (If you put a higher number than there really are the screen will blink for any slides that do not exist. -very ugly. Make sure that if you are using multiple slide shows that you have the same amount of slides in each show.)

Message Board Line#1-10:
Enter a text message that you want to display under the heading "Notes & Specials on the Message Board along with any 86'd Items. The Message Board is useful for daily specials and general information the staff needs to know.

Note: This is another slide show option as defined in Terminal Options/Slide Show Type.

Bitmap Specs
The slides are standard bitmaps (BMP) that any graphic artist can produce. The following are the specifications for the BMPs:

Size=800x600 Pixels
Color=24 bit (For faster load times use 256 color (8-Bit) with color diffusion.)
Location=C\win-ez\client\saver
Naming
Promotional-1= P10001-9.bmp

Promotional-2= P20001-9.bmp
Promotional-3= P30001-9.bmp
Staff Train-1= T10001-9.bmp
Staff Train-2= T20001-9.bmp

Example: If you had two slides in staff train-2, copy P20001.bmp and P20001.bmp into the c:\win-ez\client\saver folder. Then set the terminals to show staff train-2

1.3.7.1.3 Security

This section sets up the security for the system. This is a global setting so each job code will be affected.

Electronic Journal:
This will create a detailed audit trail of when items were ordered, canceled, sent to remote printers and voided. Electronic journal will stamp the time, and employee for all detail entries. The detail is available at the touch screen by selecting the "STATS" button on the table or recall pages and then selecting SHOW ALL. This can also be printed.

Transfer Security:
This will affect the transferring of checks from one employee to another, when selecting the employee to receive the check or checks. It uses a list (usually for managers) an employee swipe card or a keypad. Note: Swipe card and keypad require the receiving employee swipe their card or enter their number thereby acknowledging and accepting the transfer.

Transfer Recalculate Tax:

When a check is transferred to another employee, if that employee is at a different bar tax as defined in job code config, should the tax be recalculated? This is used in a bar that is set to inclusive bar tax and the check gets transferred to a server who is set to exclusive bar tax.

Secret Number Login:
This Allows Win-EZ to use the employees secret number rather than employee number assigned in Staff/ Employee to login to the system

Login Number Masking:
If turned on the login Passcode on the start page will read "****" If turned off the Passcode will display the actual number.

Manager Swipe:
If this feature is turned on all of the security windows will be set to a swipe window and no keypad will appear.

Note: If this feature is turned on and a manager loses his/her only card the feature will need to be turned off until a new card is assigned.

1.3.7.1.4 Time Clock X/Z

This section is set up for clock outs. It is a global setting and each job code will behave the same.

Long Cashier Server Reports:
Is a complete list of all checks closed to print out when a server report is printed needed? With is feature on, it helps employees double check the sales for the shift.

Long Cashier on Final-Z Reports:
Is a complete list of all checks closed to print out when a final cash out is run needed? Long Cashier on Server Report or Final-Z will show the same information.

Tip Report on Final-Z Reports:
For most restaurants, correct tip declaration is a major concern for everyone. This feature does not force the staff to claim tips correctly, nor does it exempt the restaurant from correct tip claiming. This feature is information for the staff on how much they have claimed in tips.

Cash Tip window on Final Cash out:
This will allow you to turn on or off the declare cash tips window on final cash out. Only use this if tips are not collected for employees
i.e. counter service.

Cash Tip window on Final Clock Out:
This will allow you to turn on or off the declare cash tips window when an employee clocks out. Only use this if global employee cash out is being used.

Global Cash Out:
This will run a Final Z-Out on all clocked out employees. It will clear the totals and do all required house keeping for those employees. The Forced Tip Out function normally triggered by final cash out will happen at clock out if this feature is turned on. Note: You will need to attach command "Global Cash Out" to a command button on the "Other functions" page will need to be added

To use this feature, all checks must be closed and all employees must be clocked out. After pressing "Okay" the system will ask if the manager performing this function would like to clock out and declare tips.

Forced Tip Settlement on Credit Card Transactions:
If this feature is turned on it will require tipped employees to enter a tip on every credit card transaction before they are allowed to cash out. Note: that even zero tips must be entered as the system has no way of telling if a tip was required.

Final-Z Before Clock-Out:
Is a final cash out needed before allowing an employee to clock out? We strongly recommend "YES" on this option.

Clock-Out After Final-Z:
Upon running a final cash out the system can ask automatically if the employee wants to clock out.

Clock-Out With Open Checks:
This allows servers to clock-out with open checks. We recommend you do not use this feature. It was written for Denny's to accommodate their break policy.

Server Report Tip Reference:
Set this to a number percentage that will display within the server report. Note: This is a reference field only and is not to be used as a guideline for how much tip is to be declared by the employee.

Time Clock Report:
This will add or remove the time clock report buttons from the clock out window. The screen gives the option of viewing and printing "This Weeks" or "Last Weeks" accumulated hours. Some clients do not want the employees to have access to accumulated hour reports as they may change through the modify labor feature in Win-EZ Manager.

or


Open Drawer on Final-Z:
This will kick the cash drawer upon final-Z if desired in a cashier system.

Server Rep w/Open Checks:
This will not let any employees run a server report with open checks.

Require Server Report Before Final-Z:
This will require that a server report has been printed prior to doing a Final Cashouts. This will help if employees are forgetting to reconcile their cash prior to doing their Final Cashouts.

1.3.7.1.5 Order Types

This will define the order types that appear on the "Change Order Type" button. Order types are used in reporting
to separate here versus To Go orders and can be used to define revenue centers as well. Order Type button is set in Modules/ Button Editor/ Master Control Job Code....

1.3.7.1.6 Text Output

Video Text Insertion:
The Win-EZ POS system is compatible with two main methods on text insertion into a video system.

Text Injection Option:
For terminal one through four the option is available to use text injectors. These are devices that the camera plugs into that displays the text onto the video being recorded. This method is compatible with almost every video system on the market.

1.3.7.1.7 Message Mods

Insert Message Mods is another way to modify menu items. This feature forces the modifiers which are entered by the keyboard directly under the item being ordered similar to the "Forced Mods" . It will then insert a message modifier as defined in POS Settings/Global Options/Message Mods

Message Department:
Create a new department called "Modifiers" or similar to a department in Product/ Department.

Message Modifier #1-#9:
Create up to Nine Product Items to be "message modifiers". Create distinctly different names like message-1, message-2 etc. Assign each to the department chosen above and check the "Modifier" box in the Product Item section. The modifiers can print in red if the "Red Print" box is checked in Product Item section.

When "Message Item" is assigned to an employees "Master Control" page a keyboard will be displayed where a message can be inserted directly under the menu item that needs special instructions for preparation.

Up to NINE lines can be hand typed for each item.

1.3.7.1.8 Recall Screens

Recall Screen Background

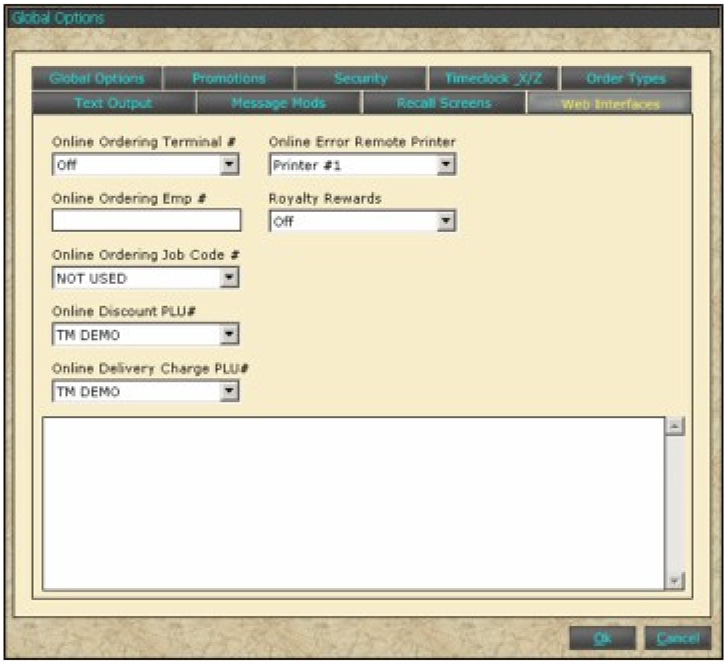
Win-EZ allows a change to the background on the servers, bartenders and cashiers recall screens to help managers determine how employees are logged in. This feature is useful to determine if an unauthorized employee (server) is logged in as an employee that has access to a cash drawer (bartender or cashier). There are 14 options.

Recall Screen Wildcard Button Action:
This will select "Adjust" or" List" for the three check retrieval screens. Note: Select "list" if using the online ordering interface. This will filter a list of only the online order to make retrieving easier.

1.3.7.1.9 Web Interface

Win-EZ is capable of interfacing to Ifoodtogo.com. The Web Interface is a separate Win-EZ Module which uses a web ordering terminal for the system and a subscription to Ifoodtogo is needed. The web ordering terminal does not need a touch screen or receipt printer but does need a battery backup and can use a monitor switch attached to the file server's monitor for diagnostics and setup of the terminal.

For more information contact an Authorized Win-EZ Dealer and go to www.Ifoodtogo.com to get started.



Online Ordering Terminal #:
This is the terminal number of the dedicated web ordering terminal. This setting will also turn on web ordering for the POS terminals.

Online Ordering Emp #:
Create a web ordering employee. This will be a fake employee that does not generate sales but the system needs a way to keep the orders separate until a real employee picks up the order. Upon retrieving a net order the check will automatically transfer to the employee retrieving it.

*****Important*****
Remember to set any employee's job code to "all checks" in Staff/ Job Codes that will be retrieving net orders or the system will not give them access to these checks. To see the list of online orders select the "List" button on the margin of the recall screen. If there is not see a "**List"** button but instead have an "**Adjust**" button on the recall screen go to POS Settings/Global /Recall Screens and set the three recall screens to "List Button" from "Adjust Button".

Online Ordering Job Code #:
Select the job code the above employee has a pay rate in. If the need should arise to change the dummy employee or a staff member accidentally clocks it out, the system will automatically clock the online ordering employee back without skipping a beat.

Online Error Remote Printer:
This a great feature that will alert the staff if an item on the web site was not entirely setup. If this error is triggered which remote printer should it print to for prompt corrections? Below is an example of the message.

TABLE:
PICKUP CHK#: 0
COVERS: 0 PTR:ERROR
Order Time: 3:00pm

Date: Jan 11, 2008

4:50 PM
===================
PICKUP ****PICKUP
===================
****
*ERROR*ERROR*ERROR*
****

THERE IS AN ITEM ON
THE WEB SITE THAT IS
NOT SET UP PROPERLY
CALL THIS CUSTOMER
ASAP TO TAKE THEIR
PHONE ORDER AND FIND
OUT WHAT ITEM WAS
REJECTED. CORRECT
THE ITEM ON YOUR WEB
SITE ASAP.

****
*ERROR*ERROR*ERROR*
****

CUSTOMER:
jane doe
PHONE NUMBER:
941-359-8423x
ADDRESS:
2700 10th
Palm, FL 34221

Royalty Rewards:
This rewards program interface require membership with Royalty Rewards go to www.royaltyrewards.com for more information. After becoming a member, turn this setting on and purchase the license for Win-EZ Manager. As checks are closed a file is built day by day and sent to Royalty Rewards automatically at the end of the day.

1.3.7.2 Table Service

The following section is to set up a "Table Service" environment.

1.3.7.2.1 Server

Table Times:
Table times are available on the table buttons. Select from total open time in hours and minutes, start time or none.

Table Lock:
This will allow employees to open multiple checks on one table. This is used when it is not required to close a check before another table can be opened. Using this feature is recommended in a integrated Credit Card system. This will not let more than one check be opened at a time, lessening the chances of servers running a credit card on the wrong check on the same table.

Server Covers Window:
If turned off, no covers (guest count) window will appear when opening a new table.

Service Charge %:
Select a percentage of the check subtotal to display as a "Service charge".

Service Charge If > Covers:
This will automatically generate a service charge when a receipt is printed that has more than the entering cover count in this feature. "Server Covers Window" must be turned on.

Service Charge On Check Total:
This allows the service charge to be calculated on the gross amount of the check (Post-Tax) or on the net amount of the check. (Pre-Tax). This feature is designed to allow the "Service Charge" to be automatically included in the credit card processing procedure. To turn this feature on, select "Yes" in P.O.S. Settings/ Media Config/ Credit Card.

1.3.7.2.2 Bar

Regulars on New Order:
If on, this will pop a list of regular guests window when ever a new bar tab is created.

If "Regulars" button is used, a list of all stored names will appear

Covers Window on New Order:
If turned off, no covers (guest count) window will appear when opening a new bar tab. If this feature is "off", guest count is defaulted to zero. The forced beverage feature (Global Options) is dependant on guest count so having this feature off will not "force" the bartenders to add a beverage.

Regulars on Store Tab:
If turned on, this will pop a list of regular guests window whenever a new bar tab is stored to create a new tab with the "Regulars" list displaying first.

Forced Drivers Lic.:
If using the Win-EZ drivers license scanning command feature, this option will force that a license with the age of 21 or above has been scanned or all bar items will be deleted.

1.3.7.2.3 Cashier

Close on T1 Only
Each Terminal is assigned a Terminal number. During hardware installation, T1 is assigned to the cashier station. This feature will restrict check closing to terminal T1. This feature is used mainly in a cashier environment where checks are presented to the customer by a server but cashed out at a central location.

Managers Close Checks:
This will allow managers to close checks along with cashiers. This feature should normally be turned off unless the it is specifically required.

Here/ To Go/ Delivery Covers
This feature will ask for a cover count with each new order.

Here/ To Go/ Delivery Name
This feature will prompt the cashier to "Name" each check that is opened for reference.

1.3.7.2.4 Timed Menus

Timed Menus:
Timed menus are designed to change between meal periods, such as Breakfast, Lunch and Dinner. It changes to the meal period by time so the servers will be at the correct meal period. Servers can still access other meal periods by simply pressing the different meal period.

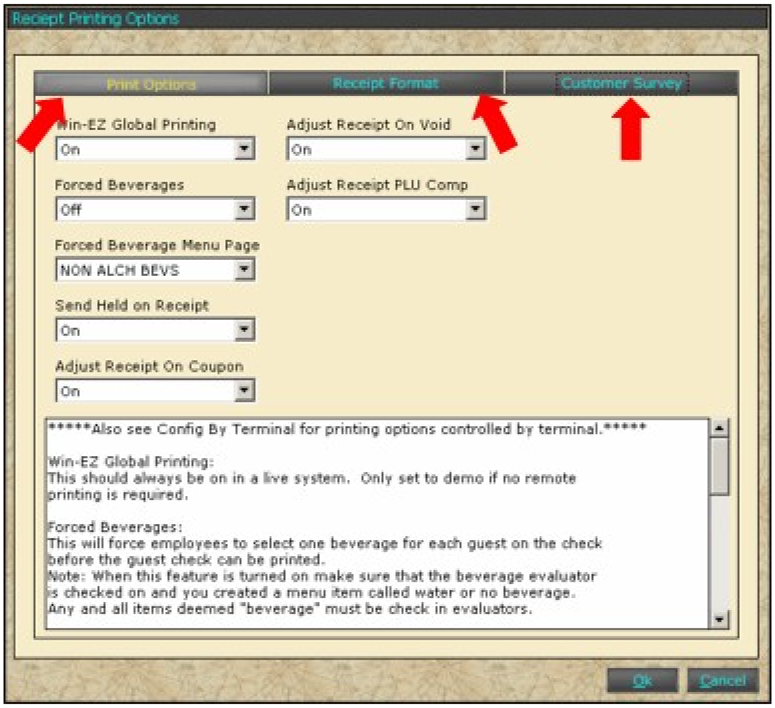
To set up this feature Job Code advanced-Default Menu is set to "Timed". Meal times are set as explained below.

Menu Start Time:
Enter a start time with a value greater than 6:01am.

Menu Stop Time:
Enter a stop time with a value less that 3:00am

1.3.7.3 Receipt Print Options

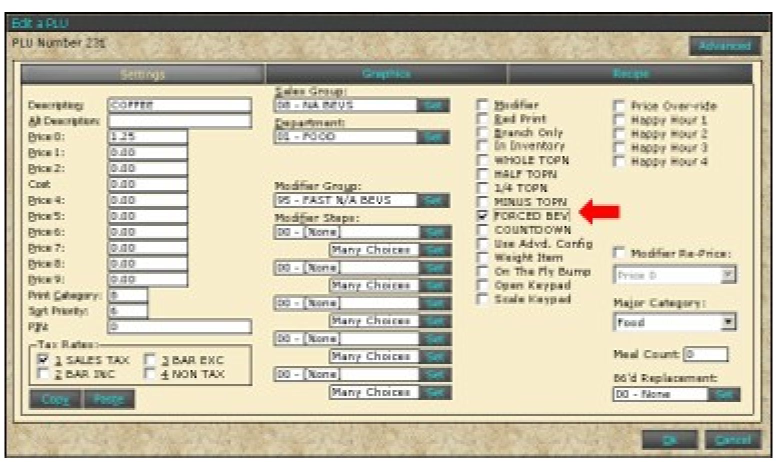
The following section is designed to let each restaurant determine how the guest checks print for the customers. There are three sections to "Receipt Print Options". Each tab is divided for easy programming.



1.3.7.3.1 Print Options

Win-EZ Global Printing:
This should always be on in a live system.

Forced Beverages:
This will force employees to select one beverage for each guest on the check before the guest check can be printed.
Note: When this feature is turned on make sure that the "forced bev" evaluator is checked on and a menu item called water or no beverage has been created for guests not purchasing a beverage. Any and all items deemed "beverage" must be checked.



Forced Beverage Pop-Up Window:
Enter the menu page number that beverages are on in this area. It is determined when item

programming is being done. If it is set to zero the window will be ignored otherwise a window will pop up with all the beverages that apply to forced beverage.

This will force employees to select one beverage for each guest on the check before the guest check can be printed.
Note: When this feature is turned on make sure that the beverage evaluator is checked on and a menu item called water or no beverage has been created and checked as "Forced Bev". Any and all items deemed "beverage" must be check in evaluators.

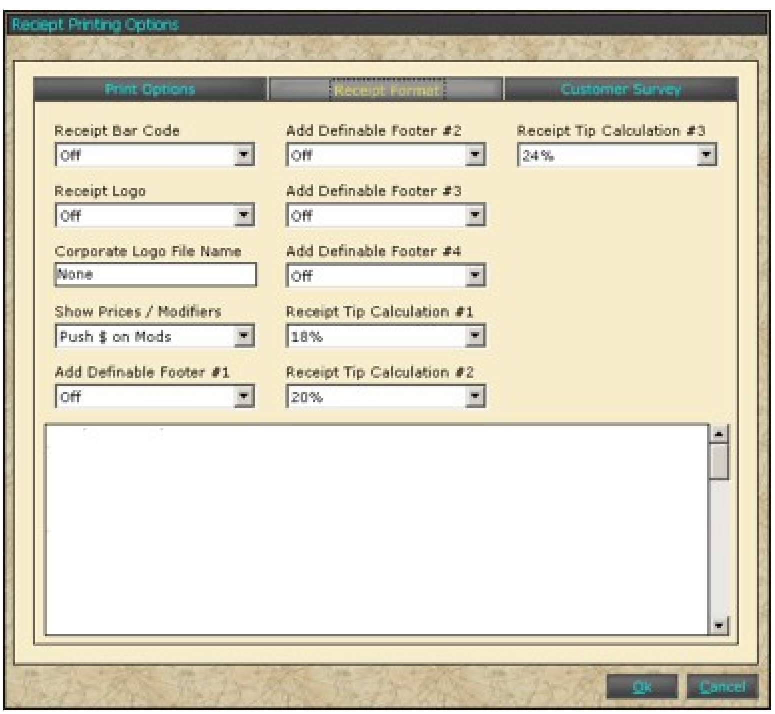
Send Held on Receipt:
In some cases if receipt on exit is turned on in Staff/ Job Code/ Advanced, there is a need to allow a receipt for checks that have held items on them, such as bartenders that have "Receipt on Exit" turned on in Staff/ Job Code/ Advanced. Turn this on and receipts will print even though held items exist.

Print Adjustment Receipt On Coupons and Discounts:
This will allow printing of an adjustment receipt on all coupons and discounts.

Print Adjustment Receipt On VOIDS:
This will allow printing of an adjustment receipt on all void functions.

Print Adjustment Receipt On PLU Comps:
This will allow printing of an adjustment receipt on all Product Item Comps.

1.3.7.3.2 Receipt Options



Receipt Bar Code:
This will allow Win-EZ to print a bar code on the receipt. It is used in a cashering system to allow fast and accurate recalling and closing of checks when utilizing a barcode scanner.

Receipt Logo:
Win-EZ has two graphical receipt header built in. Touch the Win-EZ logo on the main sign-in screen (See Win-EZ Doctor section for information) and select [LOGO G/CHK] or [LOGO C/REC]. This will download a "Guest Check" or "Customer Receipt" graphical header for your checks. With the use of the Epson graphic loader for the TM88+ a custom logo** can be burned into the eprom of the printer. If either of the graphics is loaded, this feature will allow the printing of it on the receipt. **It is the end users responsibility to provide and upkeep this feature.

Corporate Logo File Name:
Enter the six character name of the desired .T88 file for the corporate customer. This will load the desired logo from Win-EZ doctor by selecting the [Corp Logo] button.

Show Price / Modifiers
This option allows for different receipt formats in the menu item section. This is a global setting which means it acts the same for food items and bar items.

Push $ On Mods:
This will push the price of the modifier up into the parent menu item. If a Hamburger is $4.00 and Cheese is $.50 the Hamburger will read $4.50 and the cheese will not show on the receipt.

Do Not Push $ On Mods:
This will not push the price of the modifier up into the parent menu item. If a Hamburger is $4.00 and Cheese is $.50 the Hamburger will read $4.00 and a sperate line will show the cheese will read .50 on the receipt.

Show all Mods: Will show all modifiers on the receipt this will default ON for ToGo/ Pickup and Delivery orders.

USER DEFINABLE RECEIPT FOOTER 1-4:
This will allow the combining of up to four additional footers on the receipt.

JD Powers
JD Powers will append c:\Win-ez\client\survey.txt to the receipt.   The text file may be edited to fill the requirements of the J.D. Powers survey agreement.

Text Footer
Footer.txt will append c:\Win-ez\client\footer.txt to the receipt. The text file may be edited to fill the requirements of any restaurants needs. It uses forty columns and prints in normal size text.

Tip Calculator:
This will print a handy tip calculator for customers who may need help with tip calculation. Select up to three tip calculation amounts on this tab (15%, 18%, 20%)

Tip / Total Line:
This is good for high volume cashier systems that do a lot of credit cards. It will print a line for tip and total so the customer can fill in the information prior to going to the cashier terminal and presenting their credit card to the cashier.

Receipt Tip Calculation #1-3
If the Tip Calculator is selected above as a receipt footer this will define what percentages show up on the bottom of the receipt.

1.3.7.3.3 Customer Survey

Customer Survey:
This will determine what is printed for the customer survey Define the questions up to 32 characters and in the form that the question can be answered with "Poor, Fair, Good, Excellent". After the question is printed the rating will proceed.

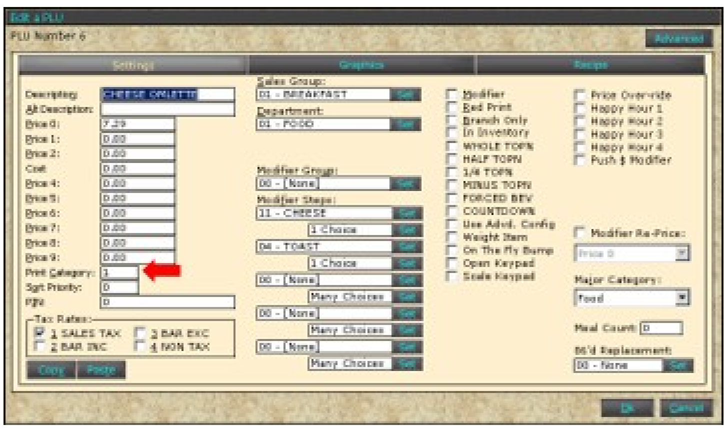
Remember: Set how often a survey to print in Job Code Advanced \ Preferences\How Often to do a Survey?

1.3.7.4 Remote Print Options

Print Job Config works in tandem with Product Items. Each items is assigned a "Print Category" during programming. This tells the item which "Remote" printers to print to such as the "Hot Line", "Salad Printer" or "Bar". In Print Job Config, the printers are assigned and the print categories are set to print to that specific printer.

Example: A Shrimp Caesar would need to go to the "Hot Line" and "Salad Printer" because different areas of the kitchen prepare different parts of this dish.

In the Product item, enter a print category. Using this example, Print Category #4 was decided.



In Print Job Config the "Hot" line is told to print any items with Print Category 4 attached to it. The "Salad" line is also told to print Category 4. This is done with an "ON/ OFF" feature per printer.

Some items will only go to one printer such as bar items. In that example, Print Category on bar items is 2 and the Print Job "Bar 1" has Print Category 2 "ON"

The more "Remote" printers at a location, the more print jobs there can be.

To name a "Print Job" click on the section "Print Job Name" and type the name of the remote printer. The more common the name, the easier to work within the print job section. For Bar Remote printers, use only the bar names are listed.

NOTE: Print Category 8 is reserved for items that print to the guest receipt only.

Print Job Name:
This is the name that will print on top of the remote print job.
Bar-1 through Bar-4 will determine which bar the remote print job will print to. Remember that in Job Code Config/Bar Printing, assign Bar-1 through Bar-4 to each job code.

Sushi will use the Sushi lowest and highest table numbers located in the "Restrictions" tab. Enter the lowest and highest sushi bar table numbers so when the sushi print job prints it will be restricted for the patrons sitting at the sushi bar.

Restrictions
Enter the lowest and highest sushi bar table numbers so when the sushi print job prints it will be restricted for the patrons sitting at the sushi bar. Remember to use the drop down box and name the print job Sushi to utilize these settings. Set both to 0 to disable this function.

Print to Printer:
Select printer p1 through p8, self requisition or none. This is assigned in Win-EZ printing at hardware installation.

Template Style:
Select the Win-EZ default style or show with seat numbers or prices. Choose "alternate description" for alternate languages or abbreviations.

Show Customer Information:
This will allow printing of customer information on the requisition if their is a customer on the check.

Course Lines & Item Arrangement:
This will arrange the items on the requisition. The following options are available:
Print All Items
This will print the items in the order they were entered in.
By Category
This will print items by category (all of 1 then 2 etc.) and will include print category 0 for every print category printed to be used for the course line.
None
This will print items by category (all of 1 then 2 etc.) and will not include print category 0 for every print category printed to be used for the course line.
Consolidated
This will roll up like items and display a quantity number.

Print Categories 1-9:
This will determine which print categories will print on the remote requisition as explained above.

Add On Category:
This will allow the addition of one extra print category on the print job but only if there are items in the standard categories to print at the time of printing. Example: With 2 printers, a pizza line and a hot line: hot items to go to the pizza line but only if there are pizzas on the order too. Set the standard item for the pizza print job to the pizza print category and set the add on category to the print category for the hot items.

Bump Split Screen:
This will allow up to two print jobs to print to the same bump monitor. Select top, bottom or full screen if split screen is not being used. The split screen selection must also be made in VPEN.exe by pressing {F10} on
the bump monitor affected. Once at the configuration screen use the space bar to toggle on split screen.

1.3.7.4.1 Scheduled Remote Printing

Win-EZ has many remote printing options to get items printed to remote printers. These are required to fulfill the needs of every client. This function happens as the very last thing before going to the printer. Therefore, setup all printing criteria as normal and only use scheduled rerouting when a bar or a kitchen closes or opens at the same time and day every week.

Scheduled Printing:
This will turn on and off the printing schedule for the printer named on the tab above.

Start Time: (Do not span the REROUTING hour new day of 5:00a.m.) Enter the time that this timed event starts. (5:01am-4:59am)

Stop Time: (Do not span the REROUTING hour new day of 5:00a.m.) Enter the time that this timed event stops. (5:01am-4:59am)

Reroute to Printer:
Select the printer to reroute to when the time and day criteria are met.

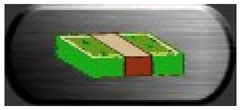
Days of the week:
Enter the days of the week that this timed event is valid.

1.3.7.5 Media Config

Each "Media" can be configured for the specific needs of the restaurant. Some restaurants want a closed cash receipt to print after a cash sale, while others only want a closed receipt to print for charge cards. This section is to configure those needs. If a media is not being used, such as house account, the button will not show on the media page.

1.3.7.5.1 Cash

This tab is to configure how the system behaves on a cash transaction. The button will be displayed on the media page as the following button.



Media Status W/CC:
This will enable or disable the media from the "Settle Page". (Use this function with integrated high speed credit card.)

Media Status W/NO CC:
This will enable or disable the media from the "Settle Page". (Use this function when NOT using non-integrated credit card.)

Open Drawer:
Should the cash drawer open when the check is paid to cash? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

Print Receipt:
Should a closed receipt print after a cash sale? It is usually not necessary for a self-banked environment, but needed in a cashier environment.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

Stamp Total Cash:
Added the non-sales media "True Cash In" and an on/off to POS Settings/Media Config/Stamp Total Cash. This will stamp in the True Cash In media all cash collected by an employee. Win-EZ has the feature of automatically deducting the charge tips from cash so the system is always in balance. However, in some cases when all the cash is turned in at the end of the night and tips are issued in payroll accounting wants to see the total cash collected. Set media #28 to "Non-Sales Media" in Settings/ POS Settings/ Media and label as desired.

1.3.7.5.2 Personal Checks

This tab is to configure how the system behaves on a personal check transaction. The button will be displayed on the media page as the following button.

Media Status W/CC:
This will enable or disable the media from the "Settle Page". (Use this function with integrated high speed credit card.)

Media Status W/NO CC:
This will enable or disable the media from the "Settle Page". (Use this function when NOT using non-integrated credit card.)

Open Drawer:
Should the cash drawer open when the check is paid to check? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

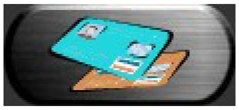
Print Receipt:
Should a closed receipt print after a check sale? It is usually not necessary for a self-banked environment, but needed in a cashier environment.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

Allow Over Tender:
This will give change back on all non cash media's such as personal checks, Gift Certificates and Gift cards. To allow over tender, enter a dollar amount into the field. This amount is a maximum dollar amount, and can be set high to allow the tip to be covered. For all non cash media's the Over tender amount is deducted from the "Cash Tendered" amount on sales reports. NOTE: Enter the amount using a decimal point such as $100.00.

1.3.7.5.3 Charge Card

This tab is to configure how the system behaves on a credit card transaction. The button will be displayed on the media page as the following button.



Win-EZ Credit Card:
This lets the system know Win-EZ high speed credit card is being used

Media Status W/CC:
This will enable or disable the media from the "Settle Page". (Use this function with integrated high speed credit card.)

Media Status W/NO CC:
This will enable or disable the media from the "Settle Page". (Use this function when NOT using non-integrated credit card.)

Open Drawer:
Should the cash drawer open when the check is paid to credit card? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

Print Receipt:
Should a closed receipt print after a credit card sale? It is usually not necessary for a self-banked environment but needed in a cashier environment. A receipt is usually needed for Credit Card to attach to the customer signed Credit Card draft as a closed tip receipt.

Apply Service Charge:
This will automatically apply a service charge to a credit card. The charge can be over-ridden with the gratuity button if the employees security level allows. The amount of service charge is calculated base on its relative percentage of the authorization amount. Example: a $10.00 check with a %20 service charge results in a $2.00 gratuity. If the charge card amount is $5.00 the gratuity applied would be $1.00. This feature works with "P.O.S. Settings/ Global/ Table Service/ Server functions. The server has the ability to NOT apply service charge or change the gratuity amount based on Forced Gratuity Security Level prior to submitting the credit card for processing. The Submit page displays the check amount, gratuity amount and total amount to be submitted.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

Non-Integrated Tip Window:
If Win-EZ credit card is not being used. This will allow the tip window on charge card to be suppressed. This will not allow tips to be entered into the system. This feature is used in a Quick Service environment where tips are usually not added to the credit card.

Hand Auto Security:
If Win-EZ credit card is on, this feature allows for extra security. The card or customer must be present for manual credit card entry. Choose either CVV code or Zip code.

Charge Tip Fee:
This will charge back to the employee a percentage of charge tips to cover the cost of processing fees. The fee will show as a line item at the top of the Server Report, and is added into "Cash Tender" on the Final-Z report.

Note 1: This is revenue to the company and is therefore subject to sales and income tax and is declared as revenue with a product item "Called Tip fee".

Note 2: Check state and local laws prior to using this feature. It is not legal in some states.

Cashier Swipe And Close:
This will allow the swiping of a credit card and suppress the submit window. If the credit card is authorized and the total media amount is enough to close the check, the check will automatically close. If a partial credit card is entered and a non credit card fulfills the tender amount it will also auto close. If turned on this will only effect the Cashier as defined in Job Code Advanced\Check Closing Security.

Scan or List Tip Closed:
This will allow the entry of a closed check number or in the case of a high speed cashier system where a barcode is being printed.

Print Receipt on Tip:
If turned on a "Tip Receipt" will print for verification that tip was entered correctly.

Hotel Interface:
If turned on this will interface to the hotel PMS for room charges. Add the command Room Inquiry to the desired "Master Control" or Other Functions" page to check a room's status and verify the guest's name.

1.3.7.5.4 Charge Security

Max Gratuity for Non-Managers:
This feature is percentage based. If tips exceed the percentage stated a manager must enter the gratuity. This blocks servers and bartenders from over tipping by on the credit card. For bar environments where tips are sometimes 50% or more of the check, the percentage should be set high enough so managers do not have to make that adjustment on a regular basis.

Credit Card Void Security Level:
Select the minimum security level that is allowed to void a credit card. Select from Server, Cashier or Manager. If Server or Cashier is selected, managers can still void credit cards.

Hand Auto Security:
Select the minimum security level that is allowed to hand authorize a credit card. Select from Server, Cashier or Manager. If Server or Cashier is selected, managers can still hand authorize credit cards.

1.3.7.5.5 Gift Certificate

This tab is to configure how the system behaves on a Gift Certificate transaction. The button will be displayed on the media page as the following button.

Media Status W/CC:
This will enable or disable the media from the "Settle Page". (Use this function with integrated high speed credit card.)

Media Status W/NO CC:
This will enable or disable the media from the "Settle Page". (Use this function when NOT using non-integrated credit card.)

Open Drawer:
Should the cash drawer open when the check is paid to Gift Certificate? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

Print Receipt:
Should a closed receipt print after a Gift Certificate? It is usually not necessary for a self-banked environment but needed in a cashier environment.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

Adjust Redeemed:
This feature allows for the line item of "Gift Certificate Adjust" to be on the media reports. The reports list "Gift Certificate" as a media then backs it out as an "Adjusted Gift Certificate" to show media numbers without the Gift Certificate.

Allow Over Tender:
This will give change back on all non cash media's such as personal checks, Gift Certificates and Gift cards. To allow over tender, enter a dollar amount into the field. This amount is a maximum dollar amount, and can be set high to allow the tip to be covered. For all non cash media's the Over tender amount is deducted from the "Cash Tendered"

Gratuity Window:
This will pop a gratuity window when this media is tendered. Note: All non-charge card gratuity is combined together in total gratuity on check. The credit card tips are broken out into Visa, Master card etc.

1.3.7.5.6 House Charge

This tab is to configure how the system behaves on a house account transaction. The button will be displayed on the media page as the following button.

Media Status W/CC:
This will enable or disable the media from the "Settle Page". (Use this function with integrated high speed credit card.)

Media Status W/NO CC:
This will enable or disable the media from the "Settle Page". (Use this function when NOT using non-integrated credit card.)

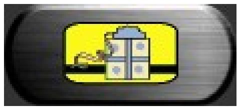
Open Drawer:
Should the cash drawer open when the check is paid to House Charge? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

Print Receipt:
Should a closed receipt print after a House Charge? It is usually not necessary for a self-banked environment but needed in a cashier environment.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

1.3.7.5.7 Gift Card

This tab is to configure how the system behaves on a gift card transaction. The button will be displayed on the media page as the following button.



Media Status W/CC:
This will enable or disable the media from the "Settle Page". (Use this function with integrated high speed credit card.)

Media Status W/NO CC:
This will enable or disable the media from the "Settle Page". (Use this function when NOT using non-integrated credit card.)

Open Drawer:
Should the cash drawer open when the check is paid to cash? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

Print Receipt:
Should a closed receipt print after a cash sale? It is usually not necessary for a self-banked environment, but needed in a cashier environment.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

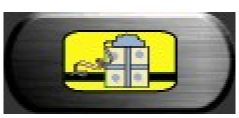
Gift Card Type:
The gift card media button can trigger internal gift card, external gift card through Sterling Payment Services, an internal VIP discount card or just a plain gift card media not attached to any database.

Allow Hand Key Entry:
This will allow the hand entry of an internal gift card number.

Gratuity Window:
This will pop a gratuity window when this media is tendered. Note: All non-charge card gratuity is combined together in total gratuity on check. The credit card tips are broken out into Visa, Master card etc.

1.3.7.5.8 Wild Card Media

This tab is to configure how the system behaves with a custom payment method. The button will be displayed on the media page uses the gift card button. Set up custom payment methods in Settings/ Medias which is explained below



Wild Card Media:
Select from a list of media's and create custom media's such as "Promo" if the ones provided do not suffice.

Open Drawer:
Should the cash drawer open when the check is paid to Gift Certificate? This feature works with Job Code settings also. The system allows for certain job code to access the cash drawer. If a terminal has a cash drawer attached and servers and bartenders use the same terminal, the cash drawer if set to "Yes" will only open if the job code allows it.

Print Receipt:
Should a closed receipt print after a Gift Certificate? It is usually not necessary for a self-banked environment but needed in a cashier environment.

Big Pole Display:
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

Gratuity Window:
This will pop a gratuity window when this media is tendered. Note: All non-charge card gratuity is combined together in total gratuity on check. The credit card tips are broken out into Visa, Master card etc.

Settings/ Media
To set up the custom media open an empty media. Name the media for use. It is NOT a Payout or a Non Sales Media (which shows on media reports). Attach the new media to the Wild Card Setting.

1.3.7.5.9 Hotel Interface

If turned on this will interface to the hotel PMS for room charges. Add the command Room Inquiry to the desired "Master Control" or Other Functions" page to check a room's status and verify the guest's name.

1.3.7.6 Config By Terminal 1-20

The following settings will only effect a selected terminal. This feature is divided up into two sections: Terminal 1-10 and 11-20. Each terminal is set with a Terminal number at hardware install. Job Code Advanced set up works in conjunction with this feature. For set up in Job Code Config, "By Terminal" is the setting that enables this feature to work.

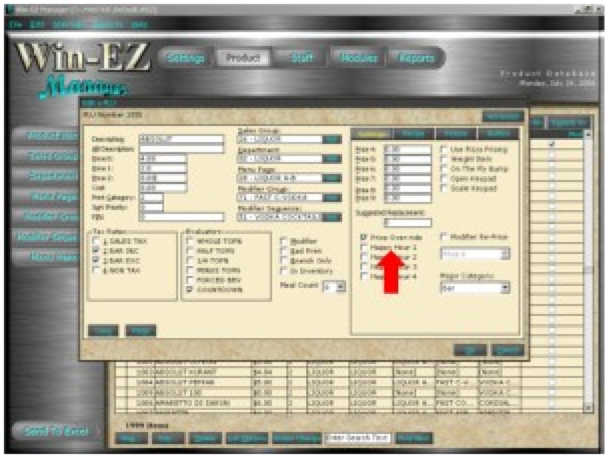
Naming Terminals: Each terminal can be named by it's common location (dining room, bar 1, patio). It will print on the remote print jobs and can define a revenue center location of where orders are placed.

Bar Remote Printing:
This will allow selected terminals to print to specific bars. If this terminal is a bartender terminal set the selection to "None". Select "By Terminal" in job code config for this setting to be recognized.

Destination Page on Enter:
Where does this job code go after the Employee number is entered on the main sign in screen? Select "By Terminal" in job code config for this setting to be recognized.

Login List By Job Code:
This is used in a low security environment where a list of employees to login is desired. If set to a valid job code, when the user touches the New Check, Recall or one of the fast login buttons a list will appear populated with the clocked in employees for the job code entered above. The Time and Other Function buttons still require a login number or an employee card as these are secure areas.

Price Level Override:
This will allow the selected terminal to ignore happy hour pricing and be in a forced price level ordering mode for all items that have price level over-ride checked. The item must have "Price Override" checked "On".



Receipt Header:
This will allow up to two different receipt headers in one system. The default will use the restaurant name and address from constants lines 1,2 and 6. The header 2 option will get the restaurant name from constants lines 31, 32 and 33. This feature is best used when one file server is being used in larger restaurants that have different names for different sections of the restaurant. This will not effect the credit card slip name which is global.

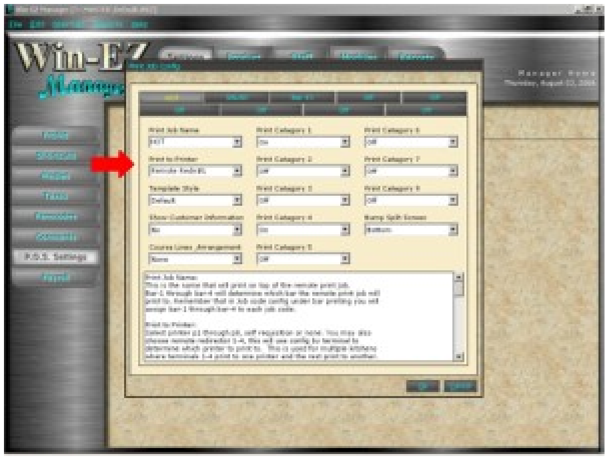
Receipt Printer Status:
This will turn off the local receipt printer if there is not one on a terminal.

Remote Re Director:
This feature is designed for a Multi Kitchen use. A normal print job goes from a terminal to the printer. With Re-Director the print job jumps the regular print job to check which terminal the print job is directed at.

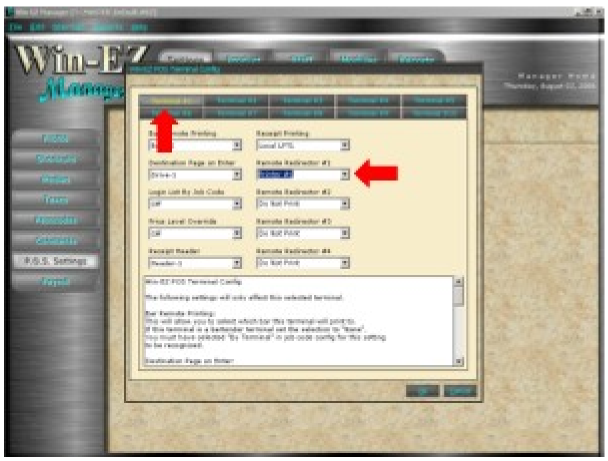
Example:
Terminal 1 is directed to the "Outside" kitchen, which is assigned P1.
Terminal 2 is directed to the "Inside" kitchen, which is assigned P3.
All Print Categories assigned to Remote redirector will print to the correct kitchen based on which terminal the item is rung up at.

This eliminates the need for multiple print jobs for the same item. This will also redirect the Bump Monitors also.

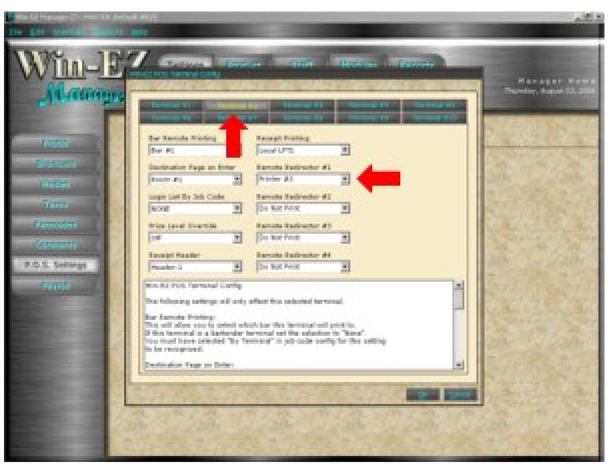
Print Job:



Terminal #1



Terminal #2



Lowest Table# To Close:
This will restrict the closing of any table number lower than this setting to close on this terminal. Useful when restricting closing tables and reporting revenue by revenue center.

Highest Table# To Close:
This will restrict the closing of any table number higher than this setting to close on this terminal. Useful when restricting closing tables and reporting revenue by revenue center.

Slide Show Type:
Promotional and Training slide shows and Message Board are selected by terminal. There are three promotional slide shows and two staff training slide shows to choose from. Please see: Global Options/Promotions for setup and
instructions.

Message Board displays any 86'd items and text message entered in Global Options/Promotions/Message Board Line# 1-10. The Message will display under the heading "Notes & Specials on the Message Board. This is useful for daily specials and general information the staff needs to know.

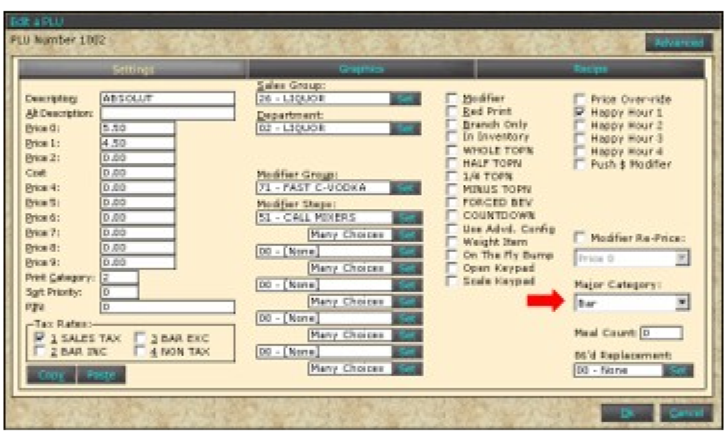
1.3.7.7 Tip Out Refence on Z

Tip out Reference is used for informational purposes only. Tip out reference will print on the Final Z report so servers can tip out the appropriate amount to "support" staff. This feature is used only as a guideline for servers. This feature will not attach the amount to any support staff on labor reporting. The support staff will still need to "Declare Cash Tips" as instructed by the restaurant and IRS.

On each menu item, field is set to be either Food or Bar. Using this feature will add up all the Food or Bar items for tip out purposes. If the bartender receives 2% of the bar sales from the servers, the system can automatically calculate that percentage.

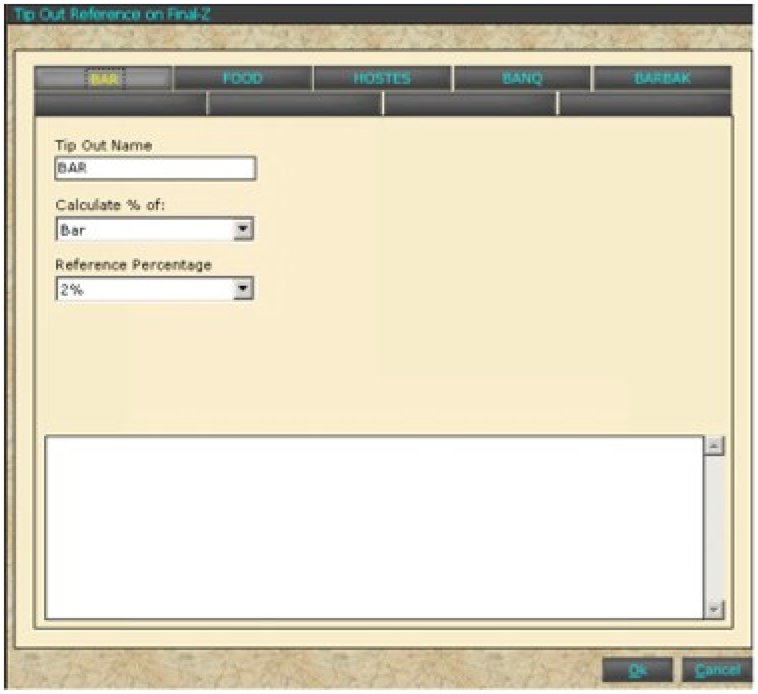
This is a 3 step process.

Step One: IN PRODUCT DATABASE
On each menu item, determine where the item is Food or Bar.



Step 2:

In this section, determine the percentage the servers tip out to each "support" staff such as bartenders, bussers, and hosts. Then decide on what Major Category they get a percentage of, such as Food, Bar or Food & Bar.



To enter the "Support:" staff name, highlight "Tip Out Name" and type it in.

Step 3: IN JOB CODE ADVANCE
Attach each Support staff reference to the job code that tips out.

1.3.7.8 Happy Hour 1-4

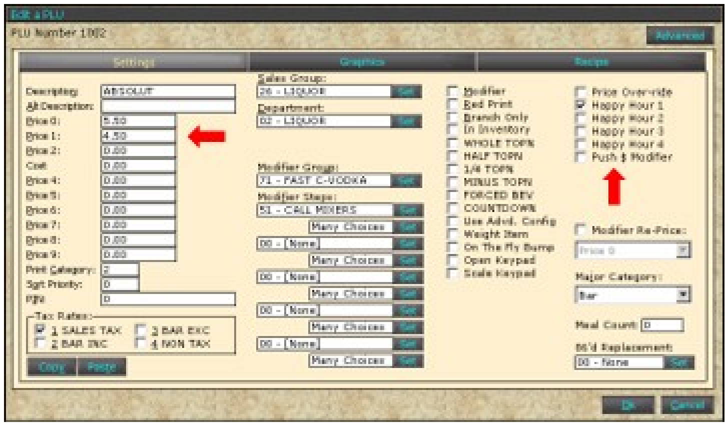
Happy Hour is the generic term used for different "Timed Events". This feature can be used for different price levels such as Early Bird dining, lunch and dinner price differences, or happy hour pricing.

Happy Hour consists of 4 groups each with 10 timed events.

There are 3 Steps to configuring Happy Hours.

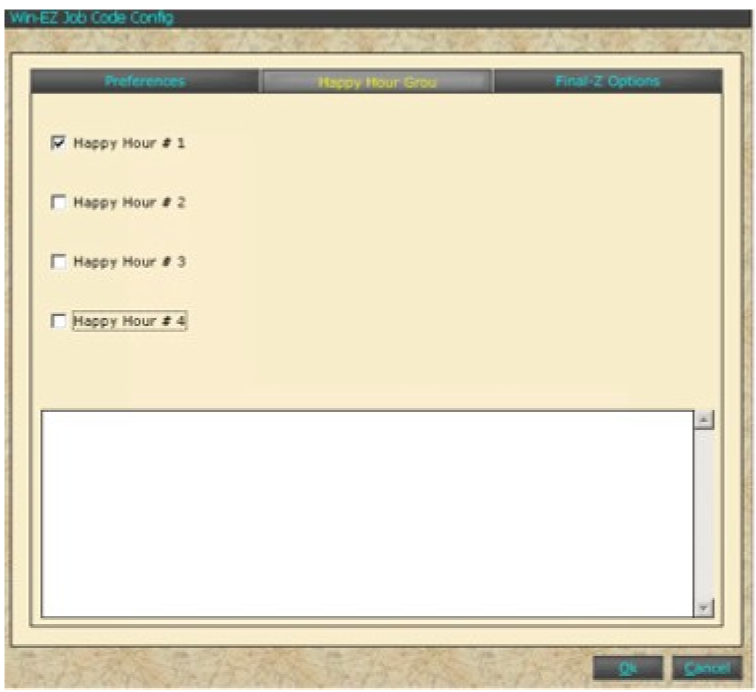
Step 1- IN PRODUCT DATABASE
Each item that has "Happy Hour" pricing would need the price per item programmed on that item. NOTE: Price 0 is the default price. The items would also need to be designated as Happy Hour 1, 2, 3, or 4, by checking the Happy Hour on the right side of the page.

The following example will be using Happy Hour 1, Price Level 1.



After each item is priced and checked as Happy Hour, job codes is the next step.

Step 2-IN JOB CODE/ ADVANCED SETTINGS
Choose which job Happy Hour is available to. For example, customers get Happy Hour pricing only if they are in the bar area being served by either a bartender or cocktail server. For each job code, in "Advance" Settings, Happy Hour would need to be checked "On"



Step 3-IN POS SETTINGS/ HAPPY HOUR 1-4
The last step is to "time" the timed event. This means setting the times and days the Happy Hour is taking place. For example, Monday- Sunday 8:00 PM to 10:00 PM. During those times, the system will price all items designated as Happy Hour 1 at Price Level 1.

To change the name of the "Timed Event"

The system allows up to 10 different timed events per Happy Hour. As an example, if there is a Wednesday 8:00 AM to 4:00 PM "Ladies Day", the settings would be set up accordingly.

Start Time:
Enter the time that this timed event starts. (8:01AM)

Stop Time:
Enter the time that this timed event stops. (3:59 PM)

Price Level:
Price level 1-8
This will ring up the item at that price level.
Locked Item
This will lock the item from ordering. Useful for early bird lock out.
2 For 1
Will ring the modifier *2-4-1 on the drink
Double
Will ring the modifier *Double on the drink

Days of the week:
Enter the days of the week that this timed event is valid.

1.3.7.9 Counter Service Options

1.3.7.9.1 Counter Service

Counter Service
Order Type Window:
An order type window can display at the beginning of an order or at the end or a different type can be entered type over-ride and the order type window will be suppressed. This feature is mainly used in a Quick Service Environment

If set to "Beginning"

The same question if set to "end" will be displayed.

Tax Exempt To Go Items:
This will allow certain items to ring up at tax rate #4 "NON TAX" for To Go orders only. For non To Go order these items will ring up at tax rate # 3. Make sure that the items that apply to this taxing rule have tax rate # 1 and #4 checked in the product database. Any items that do not apply to this tax rule should only have tax rate #1 checked.

Drive 1 Recall on Drive 2:
Turn this on if Drive 2 automatically returns to a recall list of Drive 1 open checks. This eliminates the Drive 2 employee having to select a list button after every car is tendered.

Cancel Item Action:
This is a great feature to help eliminate cashier theft set cancel item action to void item. This will result in the canceled item staying on the check as a voided item. It will not print in the kitchen or to the bump monitors and will not show on the guest receipt. In all reporting it will be marked as a voided item and therefore not effect sales or inventory counts. What it will do is keep the cashier from canceling of items and taking the money. The "canceled" item is listed as a "Void" on Server Reports and Final Cashouts. It will not report on the Comp/Void report in Win-EZ Manager.

Coupons on Media Page:
Because credit cards are not tipped in a quick service setting this feature will replace the tip credit card button with a coupon button for easy cashier access. NOTE: This feature is used in a quick service environment where tips are not taken on credit cards.

KDS Printing Style:
Select from None, On the Fly or All at End. On the fly should be used in a Quick service restaurant where the additional seconds of prep time is crucial. Use All at End for a more traditional table service restaurant that is replacing the kitchen printer with kitchen display monitors. Note Win-EZ uses the KDS NGen or IPad kitcheck display system available at www.selectelectronics.com.

KDS Interface Type:
Right now only the standard interface is supported. When KDS fully releases their new Expanded interface that interface will be made available.

1.3.7.9.2 Timed Menu Pages

Timed Menu Pages work best in a cashier/quick service environment. When set up correctly, the menu pages change based on the time of day (Breakfast, Lunch, Dinner). Set the "Breakfast" section to the Menu Page of the most used page. Do the same for Lunch and dinner but add the time lunch and dinner take affect.

NOTE: If using cashier/ server environment, the Menu Pages set up in this section will override the Button Editor assigned "Default". The Server default will change based on the times set up in the Counter Service Set up.

1.3.7.9.3 KDS Bumps

Each bump acts like a remote printer with the ability to select which items are displayed. To set each bump, enter "print categories" from the Product Items.

1.3.7.9.4 Buttons

In a cashier environment speed is usually a consideration. By adding and removing buttons from certain pages, staff will be forced to learn the fastest way to execute a function.

1.3.7.10 Delivery

Default State:
This is a global setting for a new customer so the phone order taker does not have to type in the state on every new customer.

Use Delivery Zones:
This will let the system know to bring up a list of pre-defined delivery zones upon adding a new delivery customer. (See Zones 1-15 Tabs for zone setup below)

Default City (If Zone=Off):

This is a global setting for a new customer so the phone order taker does not have to type in the city on every new customer. If delivery zones are being used, the city is definable by zone.

Default Zip (If Zone=Off):
This is a global setting for a new customer so the phone order taker does not have to type in the zip code on every new customer. If delivery zones are being used, the zip code is definable by zone.

Caller ID:
This will turn on Caller ID by selecting the number of lines you require. It uses the 4 or 8 line "light caller". This feature will require Manager version 2.27 or higher. If turned on it will pop an ID window when a new phone order is placed. It will ID the name, phone number, whether the customer is already in the data base and if it is a special priority customer.

Aux. Pizza Pricing
This turns on the pizza pricing matrix. See pizza pricing.doc for details.

Recall Last Order:
This will recall the customer's last order and allow the phone person to retain or keep individual items the customer wishes to re-order. The last order can be used in it's entirety or only certain items can be reordered. If only certain items are being kept, highlight that item and press "Keep Item". If the whole order is being repeated, press "Keep All"

Dispatch Default Sorting:
You may choose from check number which will sort oldest to newest, delivery zone which will sort from zone 1-15 or elapsed minutes which will sort shortest amount of elapsed minutes to longest.

Promise Time:
Allows phone person to stamp the promise time to print out on the delivery order. This can be done either by a list of hours from time of order needed or by specific times.

To enter a specific time, touch the clock button

Then enter the specific time

Media at Start:
Allows phone person to stamp the delivery order with a proposed payment media to alert the driver what to collect. This will turn on the media window at the start of a new delivery order. When the first order is started, the media window will not display. To start an order with "Media at Start" press the New Phone order button

Enter the phone number or choose from the Alpha list or Phone List. Continue to start the order.

If this is a new customer, enter the phone number, Press "Enter" then add the client's information such as address and directions

Continue with a new order.

Media at End:
Allows phone person to stamp the delivery order with a proposed payment media to alert the driver what to collect. This will turn on the media window at the end of a new delivery order.

Mgr IOU Credit:
Allows phone person to apply a manager credit to a new order. Any balance not used will automatically be credited back to that customers account.

Driver Auto Close:
If on, this will close all open checks when a driver returns from dispatch. It is faster than closing checks to each individual media but closes all checks to DRIVER MEDIA. This feature can not be used if using Win-EZ credit card.

Zone Tab Set Up

Zone # Surcharge Plu:
Select an item to order when a zone is selected. This will allow multiple delivery charges by zone. One Zone Surcharge may be used for all zones but this will not provide reporting by zone on the itemized Product Report.

Zone # Description:
Enter the description the order taker will see on the list of zones to select. The order taker will be prompted to select a zone when entering a new customer for delivery when a new order is started

Default City:
This is a setting by zone for a new customer so the phone order taker does not have to type in the city on every new customer.

Default Zip:
This is a setting by zone for a new customer so the phone order taker does not have to type in the zip code on every new customer.

1.3.7.11 Pool Table

The Win-EZ Pool Table configuration happens in three places. Great care has been taken to make this system flexible and as a result setup is flexible as well. Although this document concentrates on Pool Table Rental, this system is fully functional for any time based rental application.

Step1:-IN PRODUCT DATABASE
Create menu items for the tables and one set of modifiers for the number of players. Up to 99 pool tables and up to 19 players can be created. (If a minimum table charge is required place the table minimum in price level 0 of the table Product item)

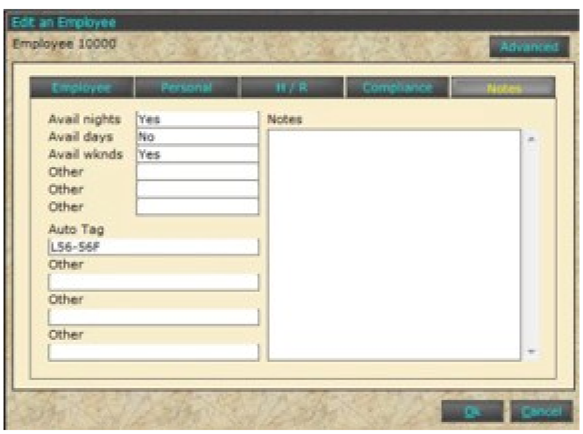
Step2: IN POS SETTINGS/ POOL TABLE
Pool table feature must be turned on. Select what security level of employee is allowed to open a new pool table. The lowest level is server, assistant manager/cashier or manager. If automatic roundup is required select the number of minutes to roundup to. (Blank is off) There is also an option to have a minimum in minutes as well, select the number of minutes to charge for a minimum global table charge. A dollar minimum can also be placed in price level 0 of the table Product Item. This is used when a different flat dollar amount is required for individual tables. Note: This will over-ride the minute minimum if the dollar amount minimum is greater than the minute minimum.

Step 3: IN OTHER FUNCTIONS/ MANAGER/ EDIT ROOM 1-4
Set up a room with pool table. To do this go to [Edit Room #] and select [Add Table]. Select the graphic of the desired pool table and position it where desired. (POOL TABLES MUST BE NAMED P1-P99) This will allow Win-EZ to distinguish it from other tables. (Note: P1-P99 is only considered a pool table when the pool table function is turned on in step 3). For room set up, see "Other Functions, Manager/Edit Room 1-4 section.

1.3.8 Payroll

There are 4 sections in Payroll, each working with other sections of Win-EZ Manager.

Section 1
User Definable Notes
When notes are entered, they display in Staff/ Employee List/ Edit Employee/ Notes. This allows for more information to be entered for each employee. (Example: available Night, Available Days, Available weekends, Auto Tag)



Section 2
User Definable Expires
When items are entered, they display in Staff/ Employee List/ Edit Employee/ Compliance. This allows for more information to be entered for each employee. (Example: 90 Period expires, State

Certification , etc.)

Section 3
Reporting
"Round Punches to the Nearest" rounds all time clock in/ out to the nearest minute based on a set time if the employee clocks in at a set minute past the nearest minute. Example: if the system is set to round to the NEAREST 15 minutes after 6 minutes past the time is set. If an employee clocks in at 6:07 PM, the system will round the time to the nearest quarter hour (6:15 PM). All reports will still show actual clock in time but reports will round to the nearest minute for payroll.

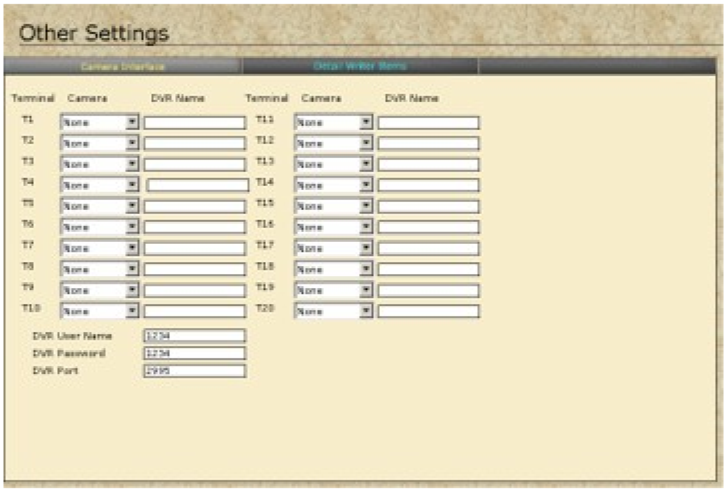
"First day of the week" is set to account for a 40 hour work week.
"Minimum Wage" is set by site to account for city, state and federal minimum wage. When wage is set, the system will account for a 40 hour work week at over time rules based on the wage entered.
"Payroll state" accounts for all state labor laws such as California's 8 hour work day/ overtime law.

Section 4
Store Number-ID
This section allows for Corporate/Enterprise users to combine all store data into one report to be used or subdivided as necessary.

1.3.9 Other Settings

This section is for current feature set up and for future features.

Camera Interface
Each terminal can have a camera interface associated with it. Camera interface is a separate module. Contact an authorized Win-EZ dealer for more information on purchase.



If information is wanted from Terminal 1 (T1) Assign the camera to the terminal. Enter the DVR name for each camera. DVR's have a 16 camera limit so multiple DVR's may be needed. The DVR name may be an IP address or the network name for each DVR Machine.

DVR User name, password, and port is standard but can be changed for security if necessary. If more than one DVR is being used (16+ camera's) each machine is should be set to the same User Name, Password and Port.

When a camera is assigned to a specific terminal, any command or keystroke assigned in Other Settings/ Detail Writer Items will display on screen.

Detail Writer Items

Detail Writer Items is where each command or keystroke is assigned for tracking purposes. There are 4 possible settings for almost all commands in Win-EZ. The settings are: Camera Only, Detail File and Camera, Detail File Only, and Not Tracked.

If Camera Only is assigned to "Cancel item" that will display function will display on the DVR interface display.

If Detail File and Camera is set, all items will display on DVR screen and to a detail file located in **Modules/ Detail Viewer.**
If Detail File Only, the items will be tracked in Detail Viewer for historical purposes.
If Not Tracked is set, the command or function will not display or be tracked in Detail Viewer.

1.4 The Staff Button

Employee List: Used to add new employees or edit current employees.

Job Codes: Used to define what the name of a job will be and their check access.

Departments: This is where different job department are defined.

Termination: This is where different termination reasons are listed

Referred By: This is where different referred by reasons are listed

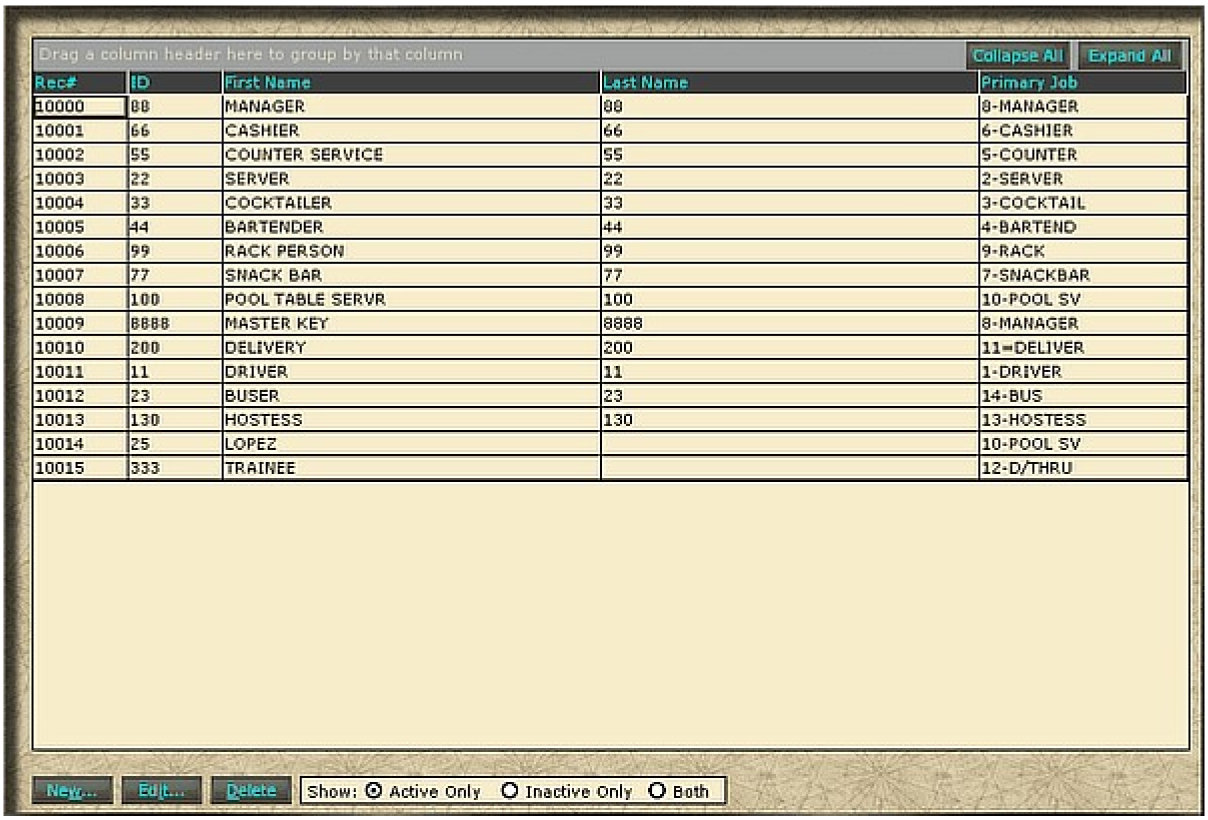
Leave of Absence: This is different leave of absence reasons are listed.

Modify Labor Data: Used to make any changes to an employees clock time or to add an employees clock time.

Modify Tips: After a final Z is run on an employee, this is the place where tip declaration can be added or deleted.

Scheduler: Used to create schedules, schedule forecasting, audit schedule, and print schedules.

1.4.1 Employee List



Rec#	ID	First Name	Last Name	Primary Job
10000	88	MANAGER	88	8-MANAGER
10001	66	CASHIER	66	6-CASHIER
10002	55	COUNTER SERVICE	55	5-COUNTER
10003	22	SERVER	22	2-SERVER
10004	33	COCKTAILER	33	3-COCKTAIL
10005	44	BARTENDER	44	4-BARTEND
10006	99	RACK PERSON	99	9-RACK
10007	77	SNACK BAR	77	7-SNACKBAR
10008	100	POOL TABLE SERVR	100	10-POOL SV
10009	8888	MASTER KEY	8888	8-MANAGER
10010	200	DELIVERY	200	11=DELIVER
10011	11	DRIVER	11	1-DRIVER
10012	23	BUSER	23	14-BUS
10013	130	HOSTESS	130	13-HOSTESS
10014	25	LOPEZ		10-POOL SV
10015	333	TRAINEE		12-D/THRU

Important information regarding editing employees and job codes:
If an employee is on the clock DO NOT make changes to their information including their name. This may cause checks and time slips to be affected. If a job code is moved to a different number, all employees assigned to the job code will need to be updated, this will also affect the historical information.

First Column (.): Shows if there is a picture saved for that employee. This will require that the dealer add a sub folder to the application folder (C:\Client\Emppic) called "emppic". Pictures should be in a bmp or jpg format, and be named with the Employee ID (i.e. 55.jpg or 1234.bmp). Pictures size should be approximately 2.4 in wide x 2.9 in high (171x206 pixels) Win-EZ manager will resize the view area to match a smaller picture, and pictures that are larger will be cropped.

ID: This is the assigned number used by the employee to access their checks or other information.

First Name: Employee's first name.

Last Name: Employee's last name:

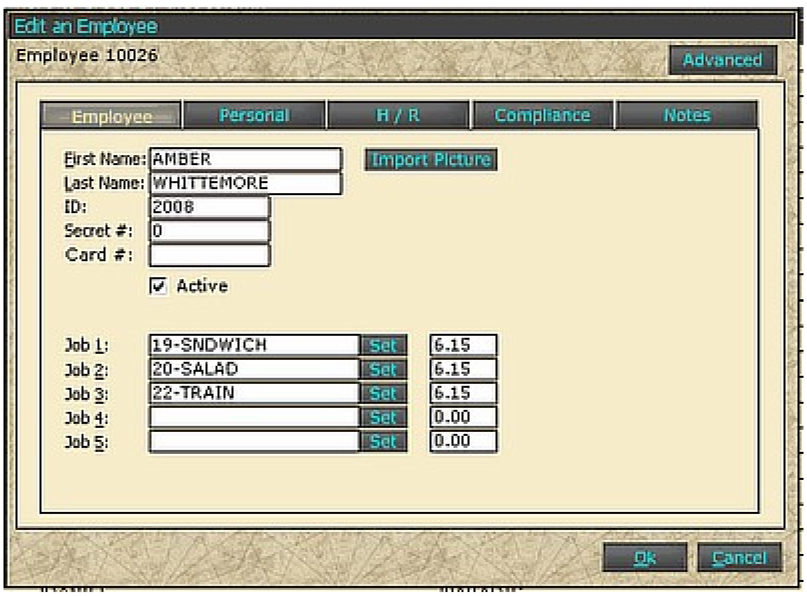
Primary Job: Any employee can have up to five job codes. This shows the first job code registered to an employee

Edit...: By highlighting an employee and clicking "edit" changes can be made to the employees information except the employee number.

Delete: Use this to delete an employee from the database. This should only be done if more room is needed. If an employee is deleted some of the historical information will be lost. If an old employee is deleted to use the number for a new employee, the historical data will save the number associated with the old employee and their time but the new employee name will be inserted into the name field.

1.4.1.1 Employee

New ...: Used to add a new employee. This will open an "edit an employee" box.



Employee: Enter the employee number here. Most often the last 4 digits of the employees Social Security are used. If the number has already been used it will display a message. This number is limited to four digits. Once an employee has established a number do not change it. The old information will not transfer over to the new number and ruin any historical tracking.

Tax ID: This is the field to enter the Social Security number or the equivalent.

Secret #: This is a custom feature. Speak to an authorized Win-EZ dealer for details.

Card#: Put in the card number for the employee.

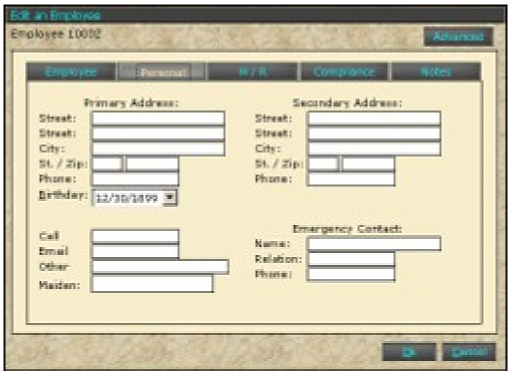
Active: Check this to mark the employee as a current active employee.

Job Code 1 - 5: Use the set button to chose from the list of job codes. Remember that Job 1 will be their primary job code. Set whatever pay rate corresponds with that job code. A Default pay rate can be set in Job Code and it will automatically enter the default amount for that job. If the employee makes more or less money for that job, the individual employee's pay rate can be changed. For salaried employee's set the pay rate to 0.01, this will calculate to 0.00 in the labor reports.

NOTE: Never leave a pay rate at $0.00. The system will not allow the employee to clock in without a pay rate.

1.4.1.2 Personal

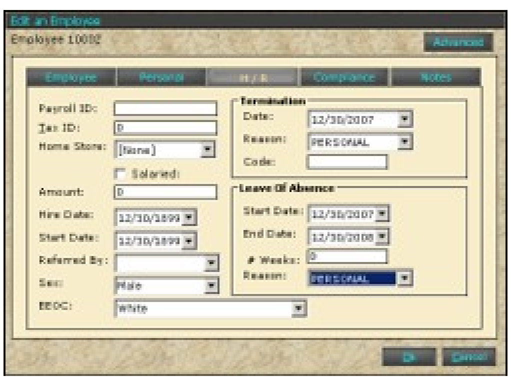
Enter a primary and secondary address for the employee as well as emergency contact Information.



1.4.1.3 H/R

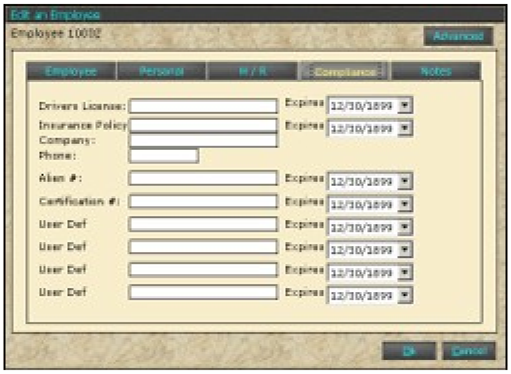
Edit personal information such as payroll ID and tax ID. The store location is entered here if there is more then one location. This section also allows for information about the employee such as hire date, start date, who the employee was referred by, and termination reason.

NOTE: The Human Resource section does NOT take the place of general H/R laws and practices. This is for quick reference only. No information added to this section can take the place of legal documents.



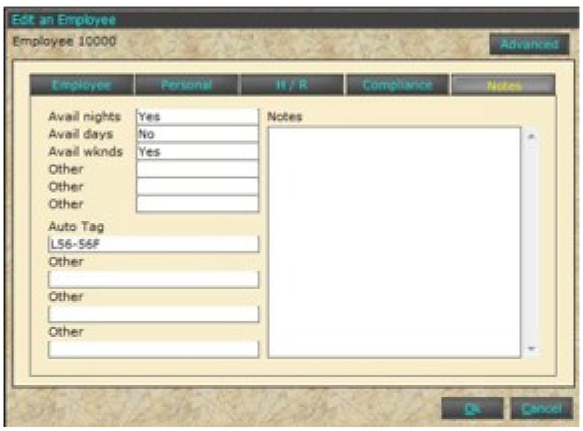
1.4.1.4 Compliance

Compliance: Input drivers license information, insurance information, alien and certification information, as well as expiration dates for all of these.



1.4.1.5 Notes

Enter miscellaneous notes about the employee. These spaces can be defined by using the Settings/ Payroll section of Win-Ez.



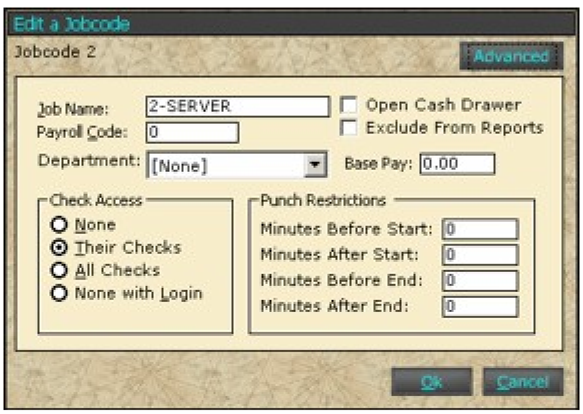
1.4.2 Job Code Specific Settings

This section will cover the all the settings to turn features on and off and set their parameters. Think of this as the central command center that works in conjunction with the master control and other functions commands. This section explains settings by job code. This provides a way to tell the system the difference from a server, bartender, manager and a cashier.

1.4.2.1 By Job Code

Each job code is set up differently, depending on what functions that job does. The first screen is a basic setup, with "Advanced" being the detail each has.

Highlight the job that needs to set up. The following screen will display. Set up as needed.



Payroll Code:
A code can be entered for export into an external payroll company file format.

Department:
Departments can be set up for reporting purposes. Examples of Departments can be Front of the House, Bar, Maintenance, Back of the House, Housekeeping.

Open Cash Drawer:
Checking "Open Cash Drawer" will allow this job code to open any cash drawer attached to a terminal if "Media" is set to "Open Cash Drawer. If a job code closes a check on a terminal with a cash drawer attached and the "Open Cash Drawer" is not checked the drawer will not open.

Exclude from Reports:
This feature is used most often for training purposes.

Base Pay:
If base pay for each job code is entered the base pay will carry over to each employee assigned that job code. Individual employees can have a different rate but the base rate is the lowest amount paid for this job.

Check Access:
The choices are None, Their checks, All checks, None with Log in.
None:
This is used for jobs that do not need access to checks, such as dishwashers, cooks, and bussers.
Their Checks
Servers and bartenders usually get this option. The will have access to only the checks they open.
All Checks:
Cashier, managers, and delivery employees usually need "All"checks.
None with Log In
Allows the job to have access to the "Other" page for tip declaration, schedules and such.

Punch Restrictions:
This feature works with "Scheduler". If times are set, employees would be unable to clock in or out prior to scheduled in or out times.

1.4.2.2 Advanced

Job Code Advanced is where each job code is programmed to the specific needs of the restaurant. Where some jobs start and end at the "Start" page, such as servers, others start and end at a "Fast Bar" Screen for quick orders.

There are 6 "tabs". Preferences, Security, Clock & Break, Happy Hour, Final Z Options and Forced

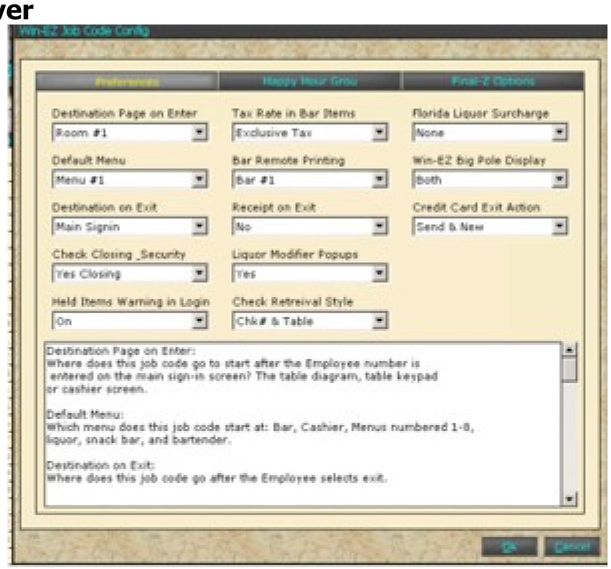
Groups. The following sections will describe each.

1.4.2.2.1 Preferences

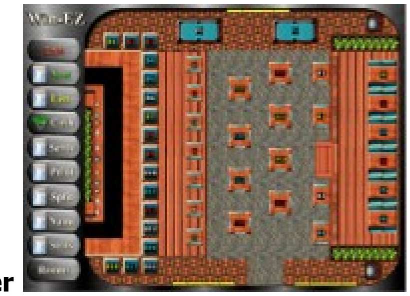
There are many options in Job Code Advanced. This manual will cover 2 examples: server and bartender. Configuring each job for the fastest, easiest way is vital for a successful installation and use. REMEMEBER: If one setting doesn't work the best for that job code, a quick simple change in Preferences is the way to correct it.

Example: Bartender

Example: Server



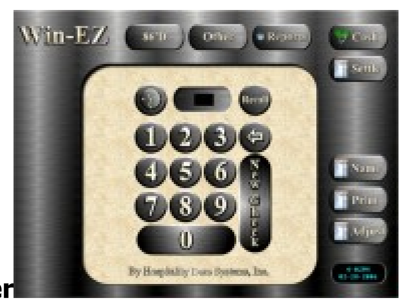
Destination Page on Enter:
Where does this job code go to start after the Employee number is entered on the main sign-in screen? The table diagram, table keypad or cashier screen.

Bar  **Server** 

Default Menu:
Which menu does this job code start at: Bar, Cashier, Menus numbered 1-8, liquor, snack bar, and bartender.

Bar  **Server** 

Destination on Exit:
Where does this job code go after the Employee selects exit.

Bar  **Server** 

Check Closing Security:
This will determine what security level and check closing rights this job code has. This means, can this job code "close" checks to a certain media. As an example in a cashier environment, servers can open checks, but only the cashier can apply "Media" and close the check.

Held Items Warning on Login:
If an employee has an item or items "On-Hold" should a warning window to pop up alerting them that they have items on hold? Every time that employee enters their number a warning will display. The Recall screen will also show which check has the items on hold.

Tax Rate on Bar Items:
This will allow bar items to ring up with "Inclusive" bar tax, "Exclusive bar tax or with the Win-EZ Smarter tax that will automatically change from inclusive to exclusive when a food item is ordered. Note: In the Product Item database tax rate 2 and 3 as well as the major category of bar must be ticked to allow this feature to work.

Bar Remote Printing:
This will allow each job code the ability to select which bar any bar orders will print to. If this job is a bartender set the selection to "None". By selecting "By Terminal" this will refer to terminal config to see where the bar print job should print. This is used to over-ride the job code and force specific terminals to print to specific bars.

Receipt on Exit:
This will print a receipt automatically on exit of a check if turned on. This feature is used primarily at bars and quick service cashier environments. Note: Do not confuse this with printing receipts on the close of a check. That is determined by the settlement media and is turned on and off in media config.

Liquor Modifier Pop-Ups:
This will determine whether this job code will get a modifier window on bar items. Generally this is set to "No" for bartenders.

Check Retrieval Style:
Select from check number and table number, check number and tab name, all check information or check number and tab name for this specific job code. This is useful when multiple bartenders are sharing a terminal and are allowed to ring up drinks on each others tabs.

Server  **Manager** 

Florida Liquor Surcharge:
This will automatically place a surcharge on the check at the selected percentage of all bar items on that check. Remember this is a surcharge not a tax, so the income to the restaurant is subject to Florida state sales tax.

Big Pole Display:

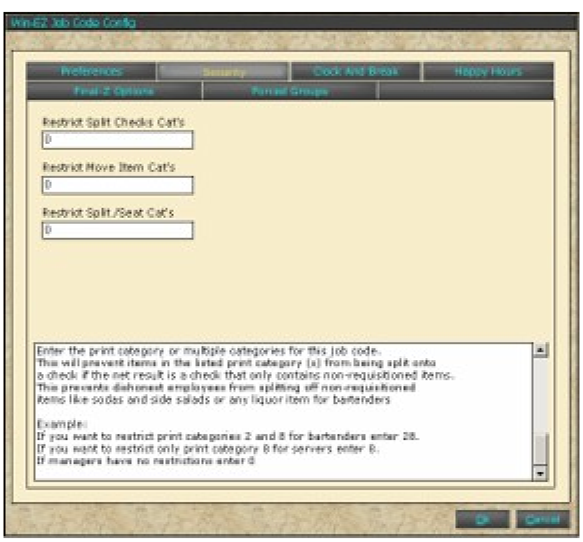
Big Pole displays a large screen for change due or amount due. This is a helpful feature in a cashier environment. It can be set to Change due, amount due, both or none in Job Code Configuration. This is a job code specific setting.

Credit Card Exit Action:
This will determine where the user goes when selecting the Exit button on the credit card media page. The choices are Send & New, Send & Recall or Send & Exit.

Customer Survey:
This will determine how often a survey is printed for this job code. If a survey is desired every 10th receipt the system will keep track by terminal how many receipts each job code prints out. This achieves a truly random pattern that increases the functionality of the survey. To define the questions and enter promotional information go to Settings/Pos Settings/Receipt Options and click on the Survey Tab.

1.4.2.2.2 Security

This section restricts certain functions by job code for added security.



Restrict Split Check Cat's:
Enter the print category or multiple categories for this job code. This will prevent items in the listed

print category(s) from being split onto a check if the net result is a check that only contains non-requisitioned items. This prevents dishonest employees from splitting off non-requisitioned items like sodas and side salads or any liquor item for bartenders

Example:
If categories 2 and 8 for bartenders should be restricted enter 28.
If print category 8 for servers enter 8 should be restricted.
If managers have no restrictions enter 0.

Restrict Move Item Cat's:
Enter the print category or multiple categories for this job code. This will prevent items in the listed print category (s) from being moved onto a check if the net result is a move of items that only contains non-requisitioned items. This prevents dishonest employees from splitting off non-requisitioned items like sodas and side salads or any liquor item for bartenders

Example:
If categories 2 and 8 for bartenders should be restricted enter 28.
If print category 8 for servers enter 8 should be restricted.
If managers have no restrictions enter 0.

Restrict Split off New Check by Seat Cat's:
Enter the print category or multiple categories for this job code. This will prevent items in the listed print category (s) from being split onto a check if the net result is a check that only contains non-requisitioned items. This prevents dishonest employees from splitting off non-requisitioned items like sodas and side salads or any liquor item for bartenders

Example:
If categories 2 and 8 for bartenders should be restricted enter 28.
If print category 8 for servers enter 8 should be restricted.
If managers have no restrictions enter 0.

1.4.2.2.3 Clock & Break

In this section breaks are defined by job code. Each employee must be given the "Job" #48 which is designated at "Break"
If breaks are paid, enter the pay amount in Job Code or by employee in the Employee list section.
Function "Break" Button must also be attached on each job's "Other Function" Page.

When an employee goes out for break the system will store all information until the employee returns from break. The following settings are for mandatory breaks.

Minimum Break Minutes:
Enter the amount of time required for each break for this job code.

Minutes Allowed Early:
Enter the number of minutes the employee is allowed to return early from break. (Will be calculated based on the Minimum Minutes Above)

Minutes Allowed Late:
Enter the number of minutes the employee is allowed to return late from break. (Will be calculated based on the Minimum Minutes Above)

Cash Tip window on Final Clock Out:
This will allow you to turn on or off the declare cash tips window when an employee clocks out. Set Options/Time clock XZ/ Cash Tip window on Final Clock Out to "By Job Code" for the system to refer to this job code setting.

1.4.2.2.4 Happy Hour

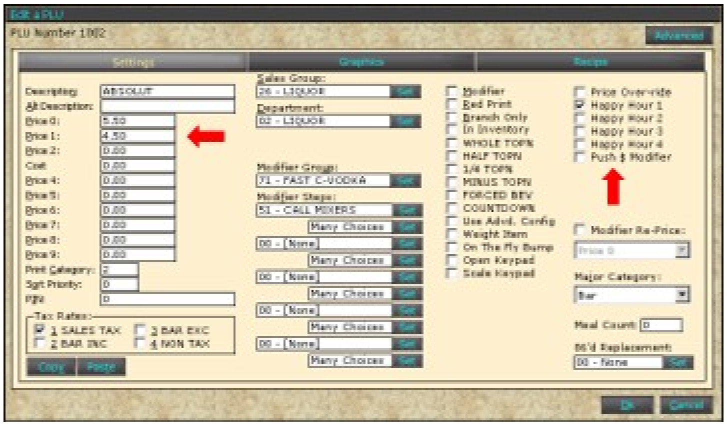
Happy Hour is the generic term used for different "Timed Events". This feature can be used for different price levels such as Early Bird dining, lunch and dinner price differences, or happy hour pricing.

Happy Hour consists of 4 groups each with 10 timed events.

There are 3 Steps to configuring Happy Hours.

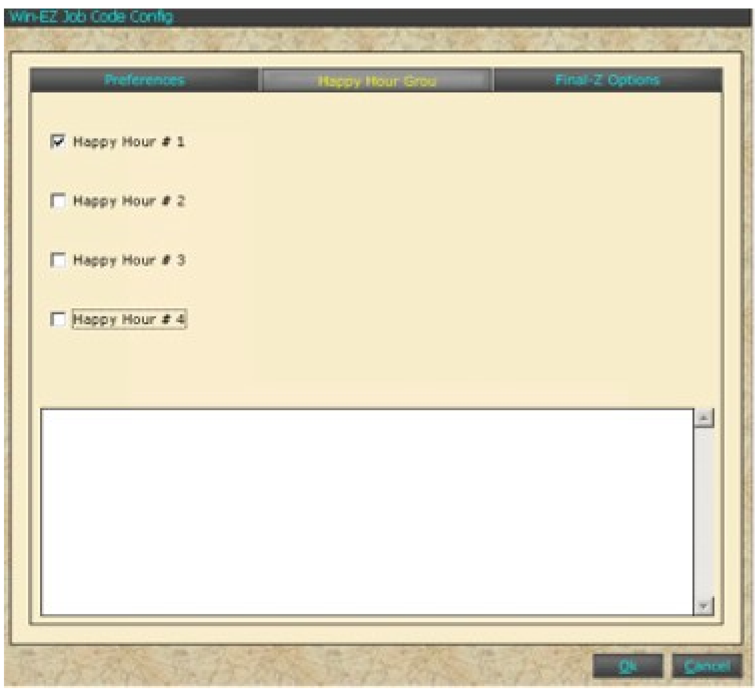
Step 1-**IN PRODUCT DATABASE**
Each item that has "Happy Hour" pricing would need the price per item programmed on that item. NOTE: Price 0 is the default price. The items would also need to be designated as Happy Hour 1, 2, 3, or 4, by checking the Happy Hour on the right side of the page.

The following example will be using Happy Hour 1, Price Level 1.



After each item is priced and checked as Happy Hour, job codes is the next step.

Step 2-IN JOB CODE ADVANCED SETTINGS
Choose which job Happy Hour is available to. For example, customers get Happy Hour pricing only if they are in the bar area being served by either a bartender or cocktail server. For each job code, in "Advance" Settings, Happy Hour would need to be checked "On"



Step 3-IN POS SETTINGS/ HAPPY HOUR 1-4
The last step is to "time" the happy hour. This means setting the times and days the Happy Hour is taking place. For example, Monday- Sunday 8:00 PM to 10:00 PM. During those times, the system will price all items designated as Happy Hour 1 at Price Level 1.

The system allows up to 10 different timed events per Happy Hour. As an example, if there is a Wednesday 8:00 AM to 4:00 PM "Ladies Day", the settings would be set up accordingly.

Start Time:
Enter the time that this timed event starts. (8:01AM)

Stop Time:
Enter the time that this timed event stops. (3:59 PM)

Price Level:
Price level 1-8
This will ring up the item at that price level.
Locked Item
This will lock the item from ordering. Useful for early bird lock out.
2 For 1
Will ring the modifier *2-4-1 on the drink
Double
Will ring the modifier *Double on the drink

Days of the week:
Enter the days of the week that this timed event is valid.

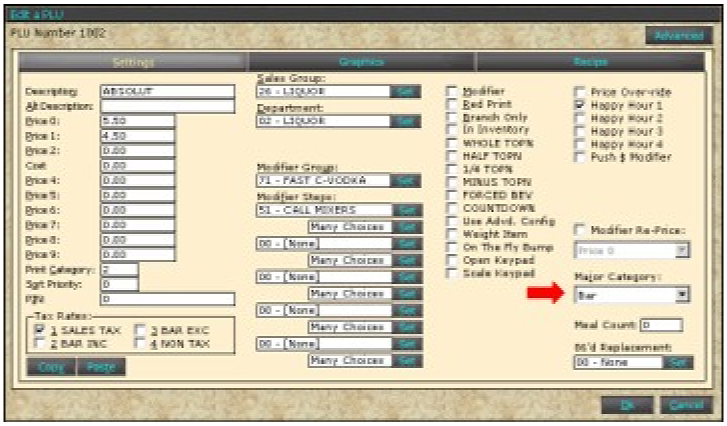
1.4.2.2.5 Final Z Options

Tip out Reference is used for informational purposes only. Tip out reference will print on the Final Z report so servers can tip out the appropriate amount to "support" staff. This feature is used only as a guideline for servers. This feature will not attach the amount to any support staff on labor reporting. The support staff will still need to "Declare Cash Tips" as instructed by the restaurant and IRS.

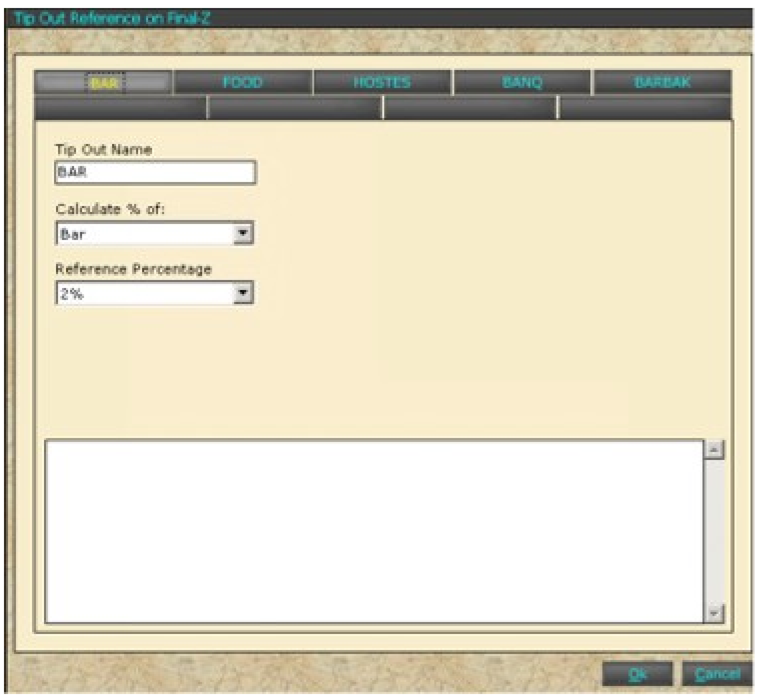
On each menu item, field is set to be either Food or Bar. Using this feature will add up all the Food or Bar items for tip out purposes. If the bartender receives 2% of the bar sales from the servers, the system can automatically calculate that percentage.

This is a 3 step process.
Step One: IN PRODUCT DATABASE

On each menu item, determine where the item is Food or Bar.

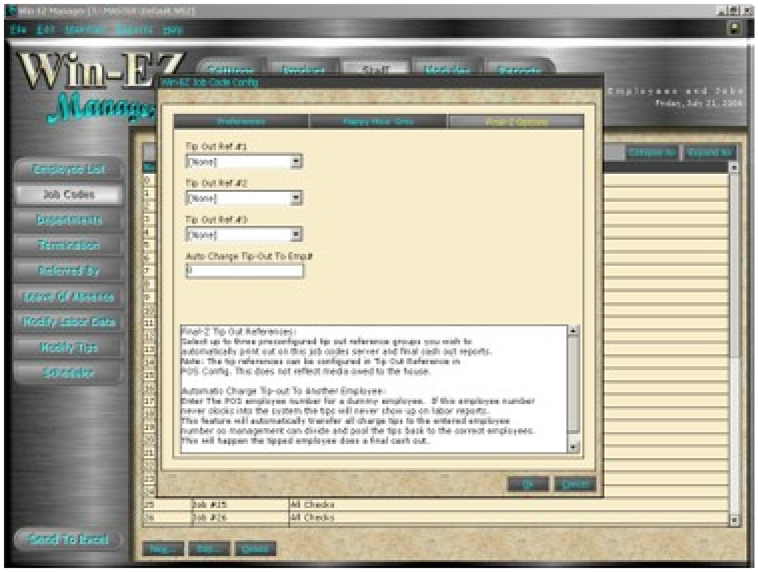


Step 2: IN POS SETTINGS/ TIP OUT REFERNCE ON Z
Determine the percentage the servers tip out to each "support" staff such as bartenders, bussers, and hosts. Then decide on what Major Category they get a percentage of, such as Food, Bar or Food & Bar.



To enter the "Support:" staff name, highlight "Tip Out Name" and type it in.

Step 3: IN JOB CODE ADVANCE
Attach each Support staff reference such as "Bar, Bussers, Bar Back" to the job code that tips out the particular support staff.



Final-Z Tip Out References:
Select up to three pre configured tip out reference groups to automatically print out on this job codes server and final cash out reports. NOTE: This is only for reference as set up in Settings/ POS Settings/ Global

Automatic Charge Tip-out To Another Employee:
Enter The POS employee number for a dummy employee. If this employee number never clocks into the system the tips will never show up on labor reports. This feature will automatically transfer all charge tips to the entered employee number so management can divide and pool the tips back to the correct employees. This will happen when the tipped employee (Server, Bartender) does a final cash out.

1.4.2.2.6 Forced Group

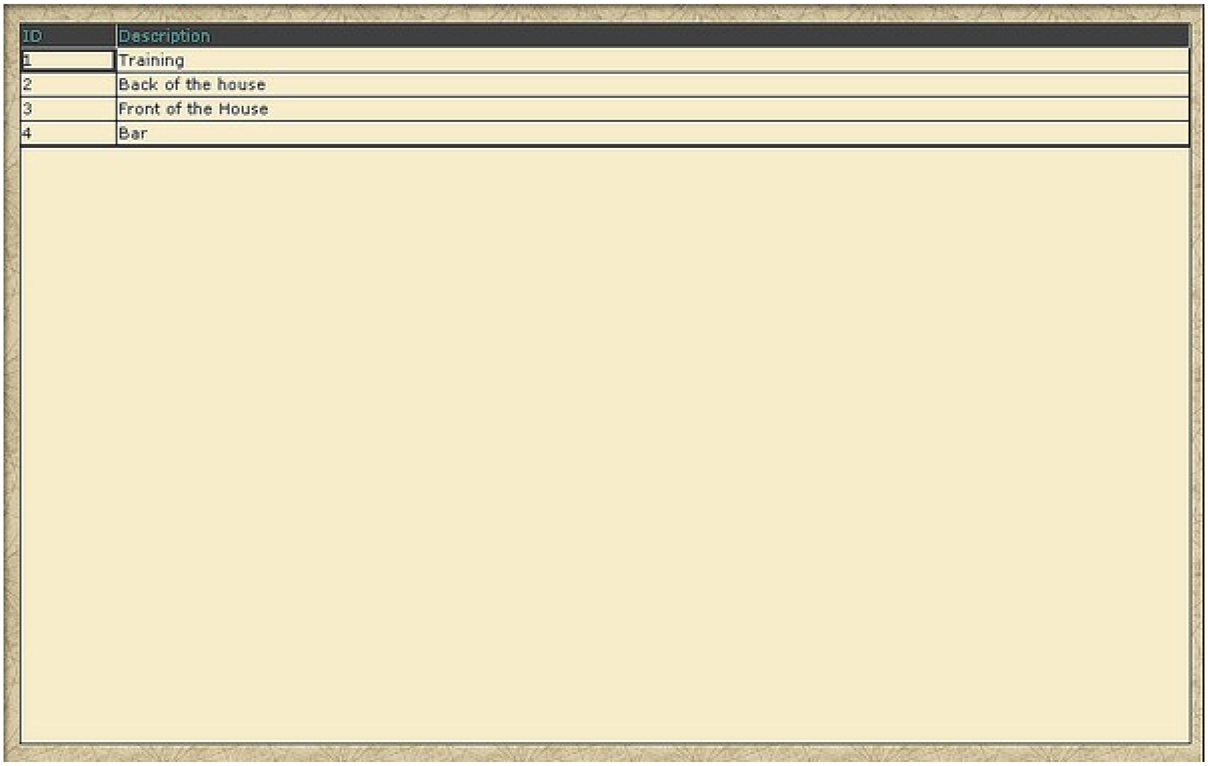
Forced Groups:
This will force an employee to enter certain items such as desserts on every check they open. This will allow better management of the sales of specific sales groups. Pick up to three different "Sales Groups" to track and hold servers accountable. Example: Desserts are a high profit item and they are already tracked as top sellers in Win-EZ reporting. Now the system can require that at least one dessert get sold for every table. For the table that does not wish a dessert create a menu item called "No Dessert" at a zero price and attach it to the dessert sales group and menu page. This will allow the server to satisfy the requirement and be reminded that no dessert was sold on that table. This will display who had the most "No Desserts" and if the check states "No Desserts" but there is a dessert on the table this will give management the tools needed to correct the problem.

Select the menu page that the forced Sales Group appears on. Win-EZ will automatically pop a window populated with those menu items at the time of guest check printing if the forced quantity is not fulfilled.

Set Up for this Feature is in Staff/ Job Code/ Advanced/ Forced Groups. This needs to be set up for each job code that will be accountable for forced sales by group.

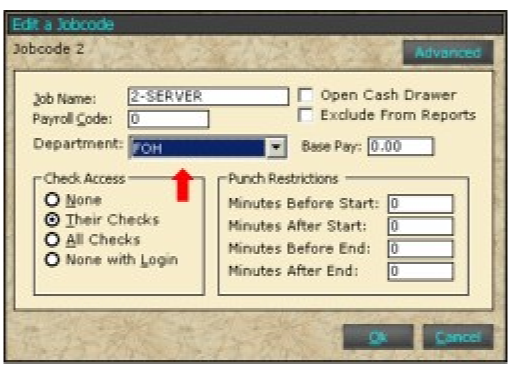
1.4.3 Departments

Departments help break down payroll reporting. By grouping different job codes together labor reporting can be broken down by departments such as Front of the house, back of the house, training, and bar.



To Set Up a Department
New: Insert a new department.
Edit: Change a department name.
Delete: Remove a department.

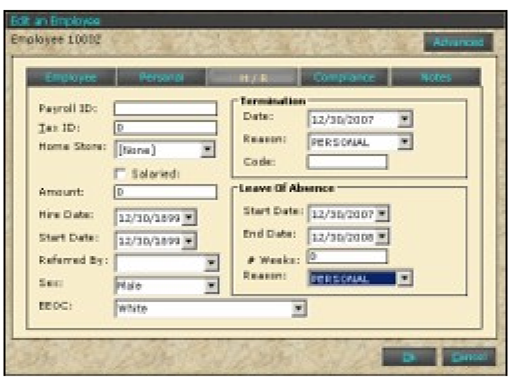
The Department is entered by job code.



1.4.4 Termination

Enter termination reasons in this section. This is a reference list to attach to employees file. This will give a quick reference to the termination reasons.

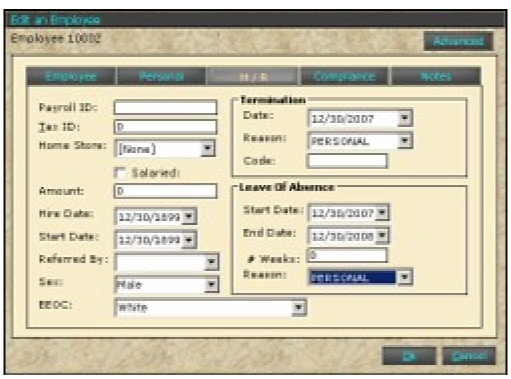
To Set up a Termination Reason
New: Insert a new termination reason.
Edit: Change a termination reason.
Delete: Remove a termination reason.



1.4.5 Referred By

Referred by is a list of people, companies, or advertising reference as to how the employee was introduced to the company.

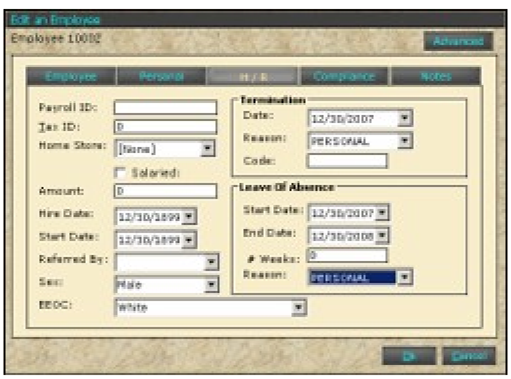
To Set Up a Reference:
New: Insert a new referred by reference.
Edit: Change a referred by reference.
Delete: Remove a referred by reference.



1.4.6 Leave of absence

Enter **Leave of Absence** reasons in this section. This is a reference list to attach to employees file. This will give a quick reference to the leave of absence reasons.

New: Insert a new leave of absence reason.
Edit: Change a leave of absence reason.
Delete: Remove a leave of absence reason.



1.4.7 Modify Labor Data

Modify Labor Data is used to adjust an employee's Clock in or Clock out.

IMPORTANT NOTE: ALWAYS LEAVE THE MODIFY LABOR DATA SCREEN AFTER MAKING CHANGES. LEAVING THE SCREEN OPEN WILL LOCK THE POINT OF SALE CLOCKING FUNCTIONS AND EMPLOYEES WILL BE UNABLE TO CLOCK IN OR OUT.

To Modify labor Data:

Select A Date: This will show everybody that has a shift worked on that day. If there are no shifts worked on a certain day, the date will not be available. No date selected is what will be on the screen when Modify Labor Data is first selected.
NOTE-Employee's time is displayed for the working day only after the employee has clocked out. To modify labor data while the employee is clocked in, use the "Other" Function on the Point Of Sale Screen.

Choose an employee and double click the employee

Employee Name: Shows the employees last name field first then the first name field.

Job: Shows what job code the employee clocked in under.

In: Shows the clock in time of the employee.

Out: Shows the clock out time of the employee.

Date: Shows the Month/Day/Year of the shift.

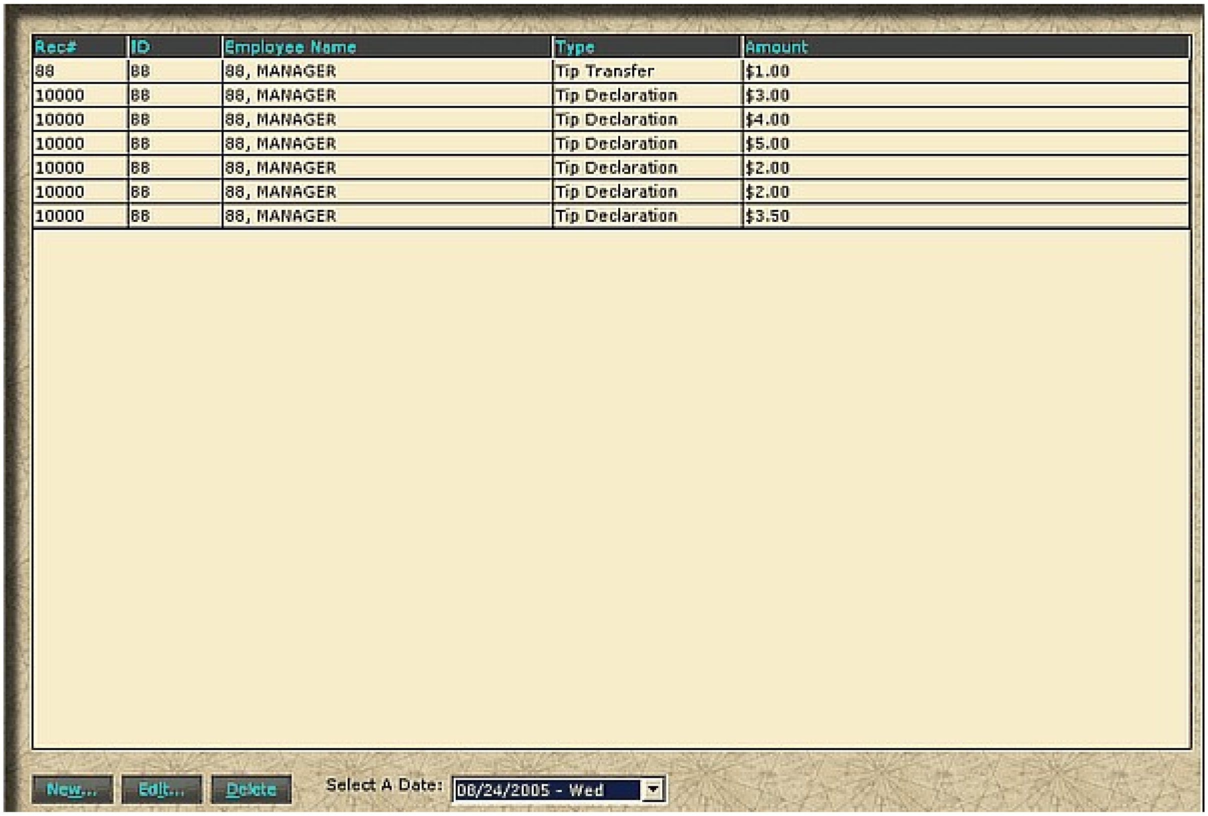
Make changes as necessary.

Records can also be added and deleted from this screen.
To Enter a shift press
"New"
Choose an employee
Choose the job the employee worked.
Set the date for the shift and the clock in and clock out times of the shift.
When the information is correct select ok.

To Delete a shift: Highlighting an employee after choosing the date and selecting the delete button will delete the shift entirely. This will erase any record of this shift.

1.4.8 Modify Tips

Modify Tips is used to insert and modify tips that are declared and transferred.



After Selecting the day tips need to be modified the following information will be displayed.

Rec#: This is the number assigned to the new employee by the database, this is different than the ID number.

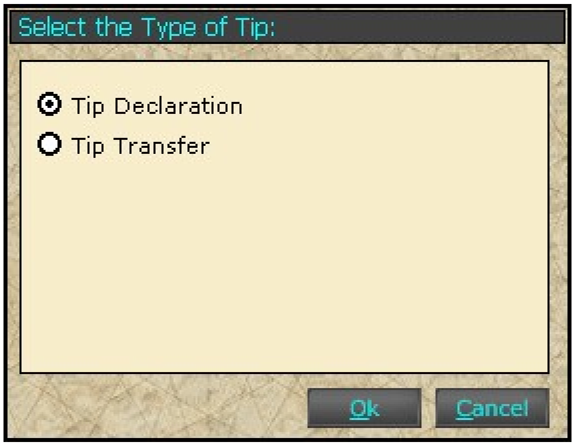
ID: Shows the employee that received the tips, ID number.

Employee name: Shows the employee's name that received the tips.

Type: Shows whether it was a declared tip or a transferred tip.

Amount: Shows the total of the tip.

To add Tip information press:
New: Inserts a new tip,
Choose whether declaring a tip or transferring.



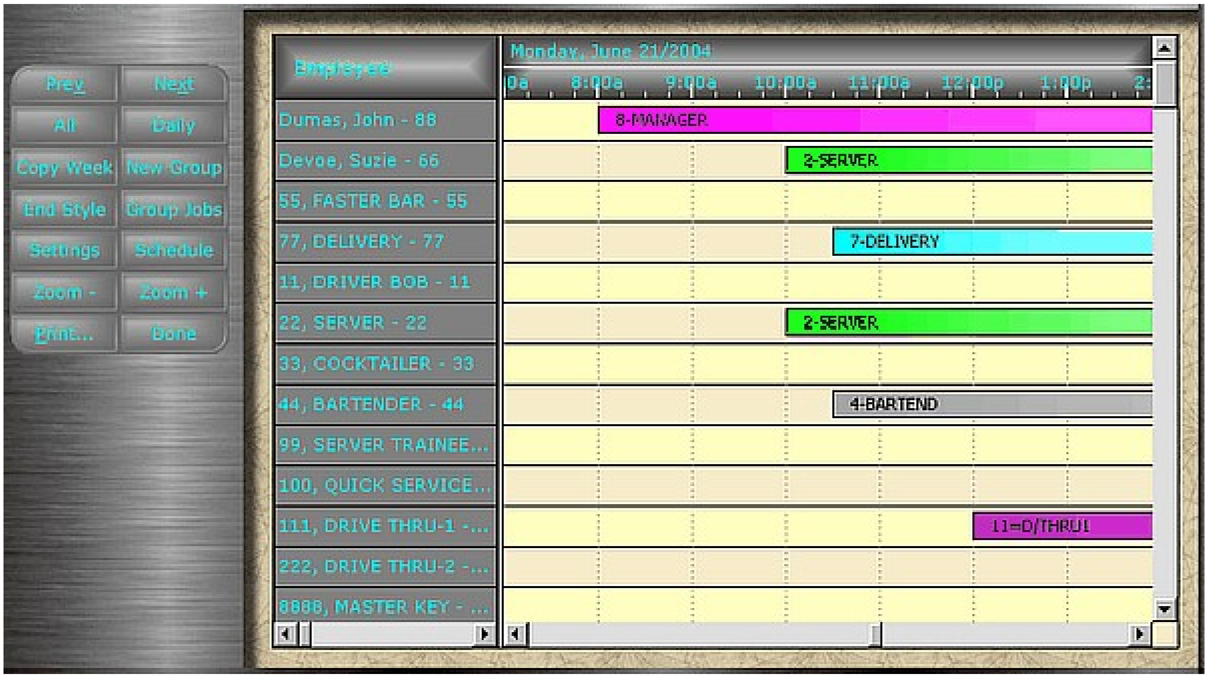
Choose the employee the tip is coming from if transferring

Select the employee that is receiving the tip.

View: View the details about a tip.
Delete: Removes a tip.

1.4.9 Scheduler

This section is used to create schedules, schedule forecasting, audit schedule, and print schedules.



To start scheduler by default, scheduler will start with a view of the present week. The first day of scheduler is set to start the same day as the Payroll Reports are set to start. (exp: payroll starts on Monday, so does scheduler). Set up for first day of the week is in Settings/ Payroll.

Using the Control Panel on the Left
There are two different screens to work with in scheduler, Weekly and Daily. Click the button to determine which format should be used.

Prev: This will jump to the previous day, even on the weekly screen it will jump one day at a time. There is no limit to how far back the scheduler will display.

Next: This will jump to the next day, even on the weekly screen it will jump one day at a time. There is no limit to how far forward the scheduler will display.

All: (masking title button) This will move between the different titles that have been created with "New Groups" (see New Groups below for more details).

Weekly (Daily): This will switch between a view of the entire week or a day. By default, when scheduler is started, it will start with a view of the present week. The first day of scheduler is set to start the same day as the Payroll Reports are set to start. (exp: payroll starts on Monday, so does scheduler). The Weekly Screen - will show an eight day week. The Daily Screen - the midnight hour of the current day in the middle of the screen is display. The screen will appear with 18 hours of previous day and 7 hours of next day available. This is for scheduling across midnight. It has a total of 49 hours available.

Copy Week: It will ask to pick the week to copy and then to pick the week to copy to.

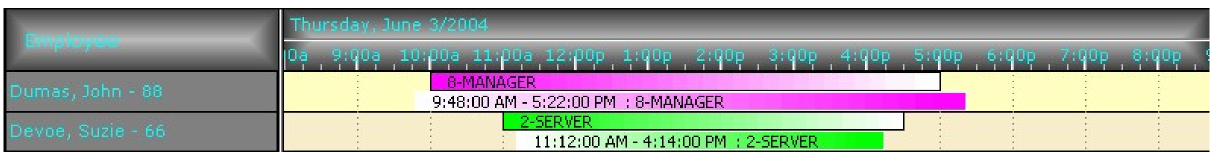
New Group: Use this to create masked schedules of just what group is needed. (exp: Manager schedule, Kitchen schedule, FOH schedule) Click edit to enter the title. Once these are created they will be available in the masking title button (All). Once a new title is entered, add the job codes to the title. Use the masking title button to select the new title, then click the "Group Jobs" button to get a pop up of all fifty job codes. Select the job codes to show up in this title by clicking the box to put a check in it. Click Group Jobs again when done.

End Style: This will scroll through the different types of beginning and ending points. There are 27 different options with none as one of the options. It will always use the points that was selected last.

Group Jobs: This opens a pop up so certain job codes may be added or removed from a masked title. Clicking Group Jobs again will close the pop up.

Settings: This gives the ability to change each job codes designated color. Double click a job code to open the color choices box.

Schedule (Audit): By default it will start on schedule. This simply shows the schedule. Clicking "Audit" will show the schedule and the actual clock in, clock out times for each employee. The scheduled time will be on top, the actual time will be below. When audit is on you will not be allowed to make any scheduling changes.



This example shows the manager was scheduled 10:00am - 5:00pm and actually worked or clocked in at 9:48 and out at 5:22. The server clocked in late at 11:12 and out early at 4:14.

Zoom - & Zoom +: These may be used to zoom in and out on either weekly or daily screens.

Print...: This will print what is on the screen only, not what is off the screen on either side.

Done: This will exit scheduler back to the main Staff screen.

Entering employee schedules

Creating a schedule can be done only on the Daily screen and not with the Audit screen on. The employees on the left are listed in alphabetical order. The shift will always input the primary job code for that employee. Enter information in at 15 minute increments.

By clicking and holding the right line of the employee box it will squeeze the employee box smaller to allow more room for the schedule.

By clicking and holding down at the start of the shift and dragging to the end of the shift, it will place a color bar in that space.

To correct a time, click and hold down at the beginning or end of the bar and move it to the correct time.

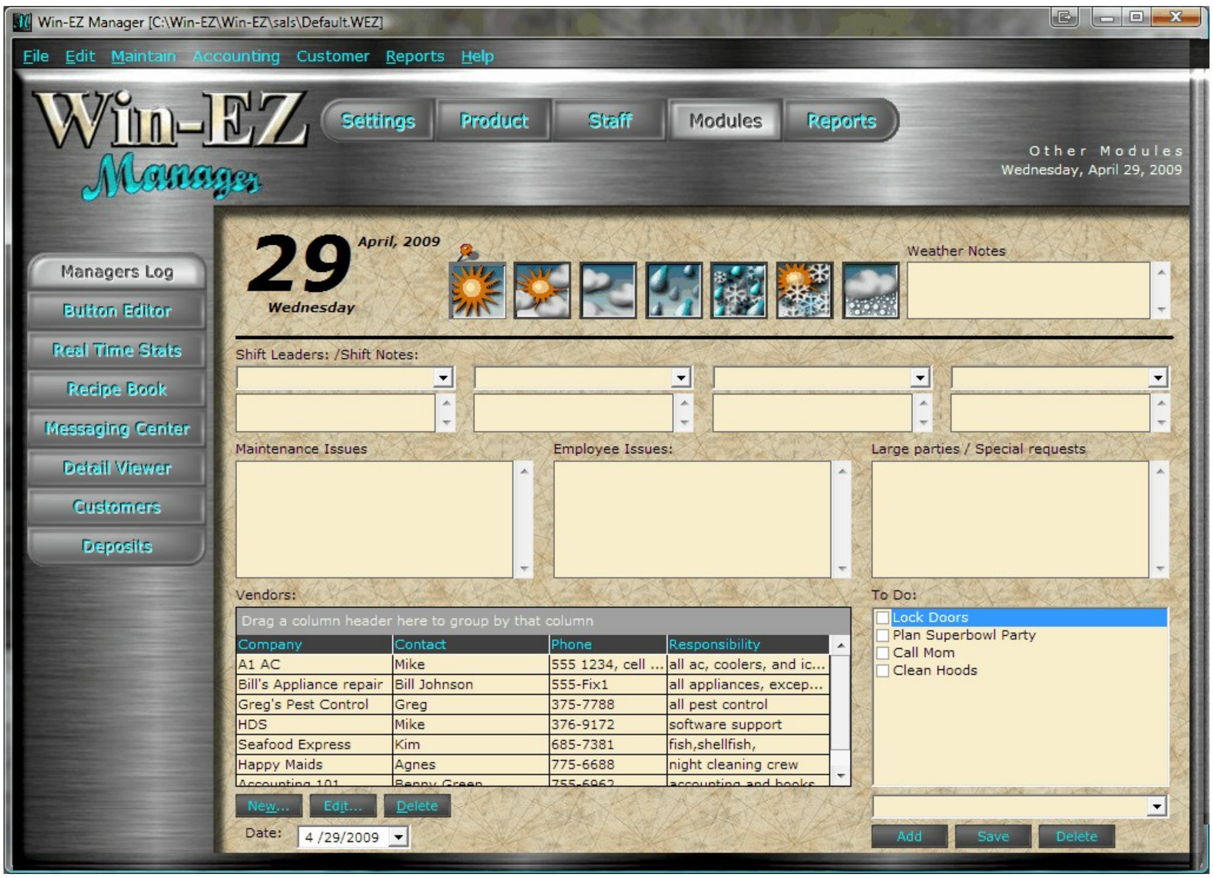
To delete an entry, click and hold down the end and pull it to the beginning. T move the entire shift, click and hold down in the middle area. Then drag it to a different time period or even a different employee.

There can not be two shifts for the same employee overlapping one another. If it is tried, the first shift will stay the same and the second shift will snap back to the next available time. If a shift from one employee is dragged and place it on top of a shift of another employee, it will put the shift back in its original spot.

By double clicking the shift a pop up window will show where the job cod can be changed. The date and the beginning and end times (here the schedule can edited down to the minute, not just in 15 min increments)

1.5 The Modules Button

Modules are added functions and features in Win-EZ.



As with each main header, there are sub categories for each. Modules include the following.

Managers Log: This will display a log of the daily activities.

Button Editor: Button Editor is where menus, mater control pages and others pages as well as some of the control buttons and their graphics are programmed for use in the Point Of Sale.

Real Time Stats: This will display up to the second stats on sales, labor and checks.

Recipe Book: This is where drink recipes can be added, deleted or modified.

Messaging Center: create and send e-mails and side work messages for all employees, certain job codes or a specific employee from this section.

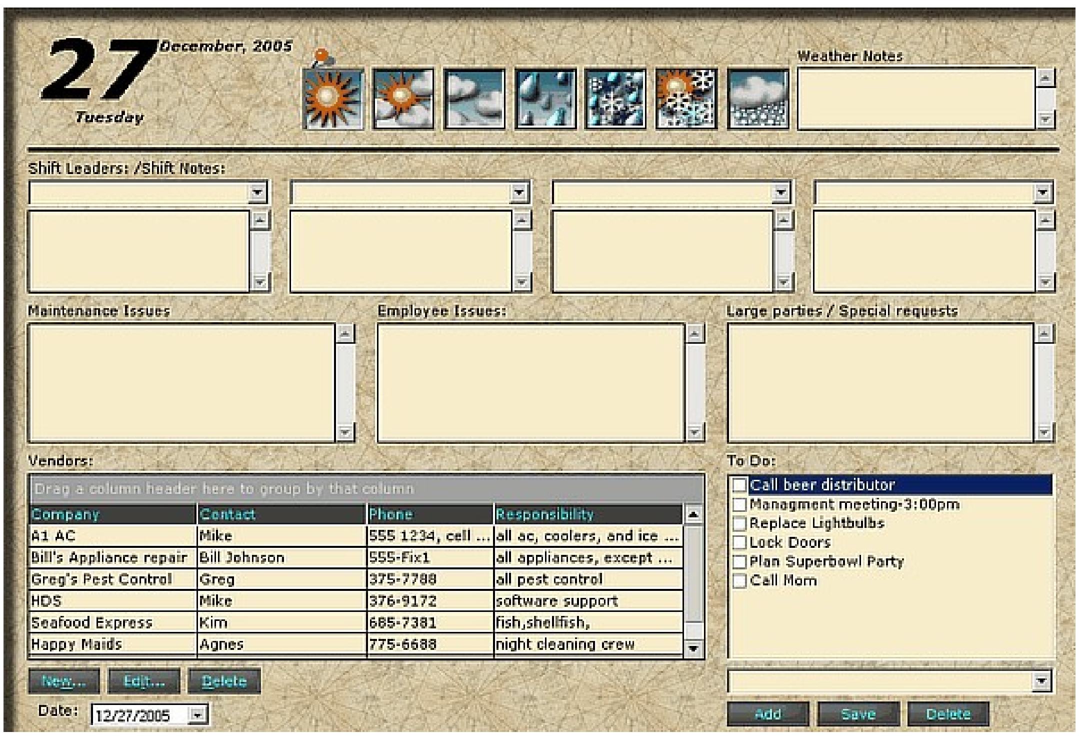
Detail Viewer: Allows viewing of detail transaction data for a day.

Customers: Allows editing of customer data.

Deposits: Allows entry of daily bank and credit card deposits with corresponding reporting in the media reports section.

1.5.1 Managers Log

This will display a log of the daily activities and of previous days.



Weather Icons: Select an icon that represents the days weather, a push pin will be placed on the weather type selected.

Weather Notes: Enter in more details for the weather.

Shift Leaders: / Shift Notes: (up to 4 people) : Use the pull down to select a name.

Shift Notes: Enter any comments from specified person.

Maintenance Issues: Enter any problems that happened with maintenance.

Employee Issues: Enter any employee issues.

Large Parties / Special Requests: Enter any information on large parties or guests special requests.

Vendors: To add a vendor select the new button and fill in the appropriate information. To change a current vendor, highlight the vendor and select edit. Or to delete a vendor highlight the vendor and select delete.

To Do: This list will carry all To Do items forward each day until they are marked completed. Completed To Do items will only show on the day that they were completed. 3 buttons are available for the To Do list: Add will add the text in the text box to the list. Save will add the text to the list and save it in a list that is available in the drop down portion of the text box so that reoccurring items are available for future use. The delete button will remove an item from the list.

Date: Use the pull down to chose a previous date and see what was entered in for that day. The present day will be circled in red, the day being viewed will be highlighted in grey. Click on any date to jump directly to that date. Use the arrows at the top to select a different month or click directly on current month to get a list of months. Click on the year to scroll through the years.

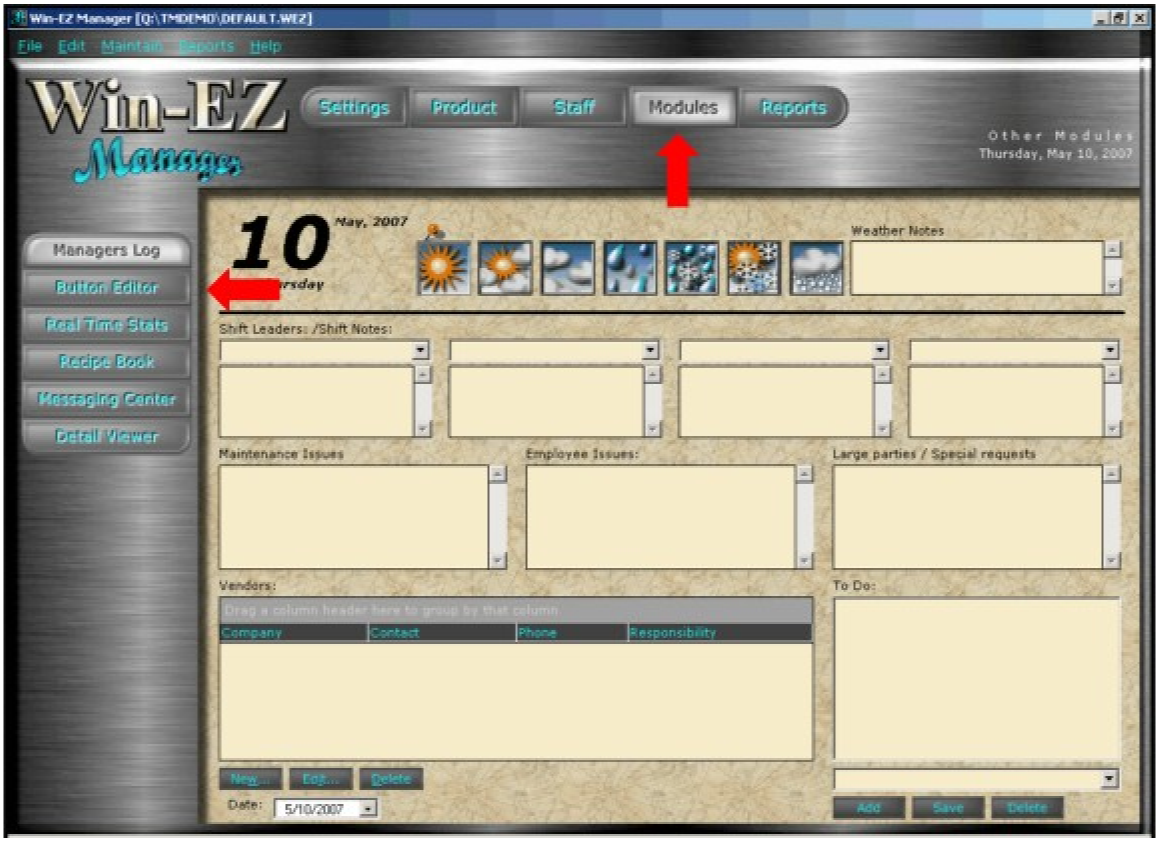
1.5.2 Button Editor/Menu

Button Editor is the set up of WHERE functions or commands are placed. There are over 200 "commands" in Win-EZ. Some have graphics that look better on certain screens while others if placed in certain screens make the flow of ordering easier. A command can be placed wherever it works best for each client.

There are 5 Steps to Button Editor setup for menus.

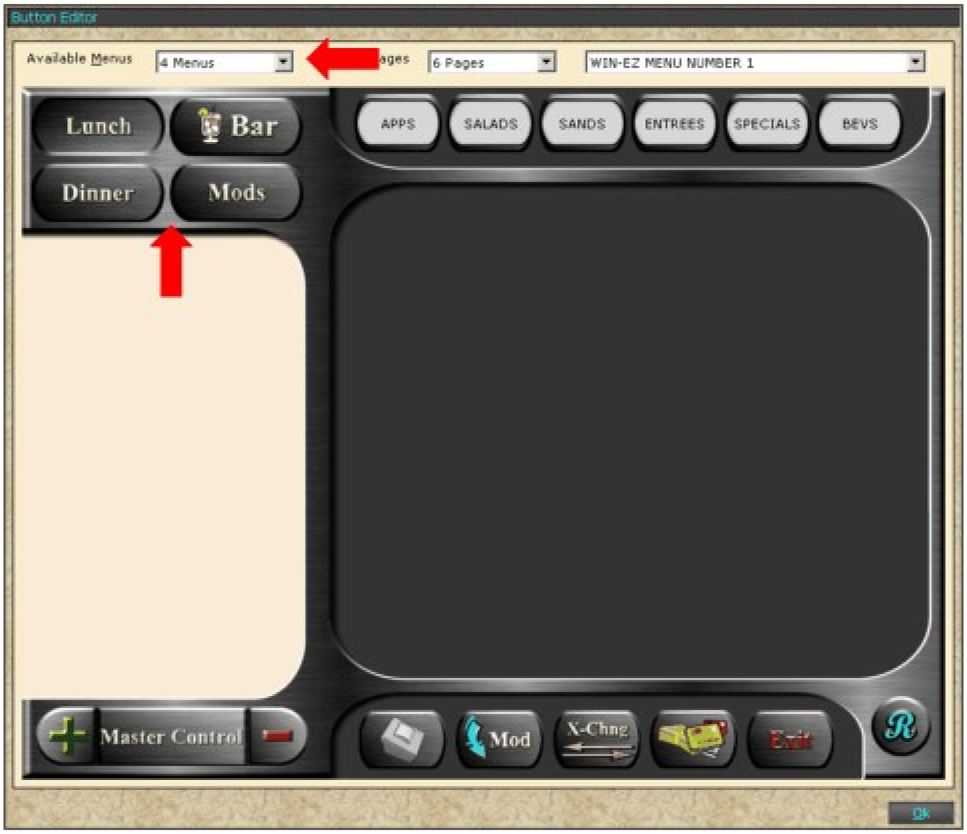
To configure your POS screens open Win-EZ Manager

Choose "Modules"



Choose "Button Editor"

Step 1
How many "Main Menus" there should be on the screen? There can be 4 or 6 "Main Menus". Use the drop down box next to "Available Menus" to open zones for 4 or 6 Main Menus

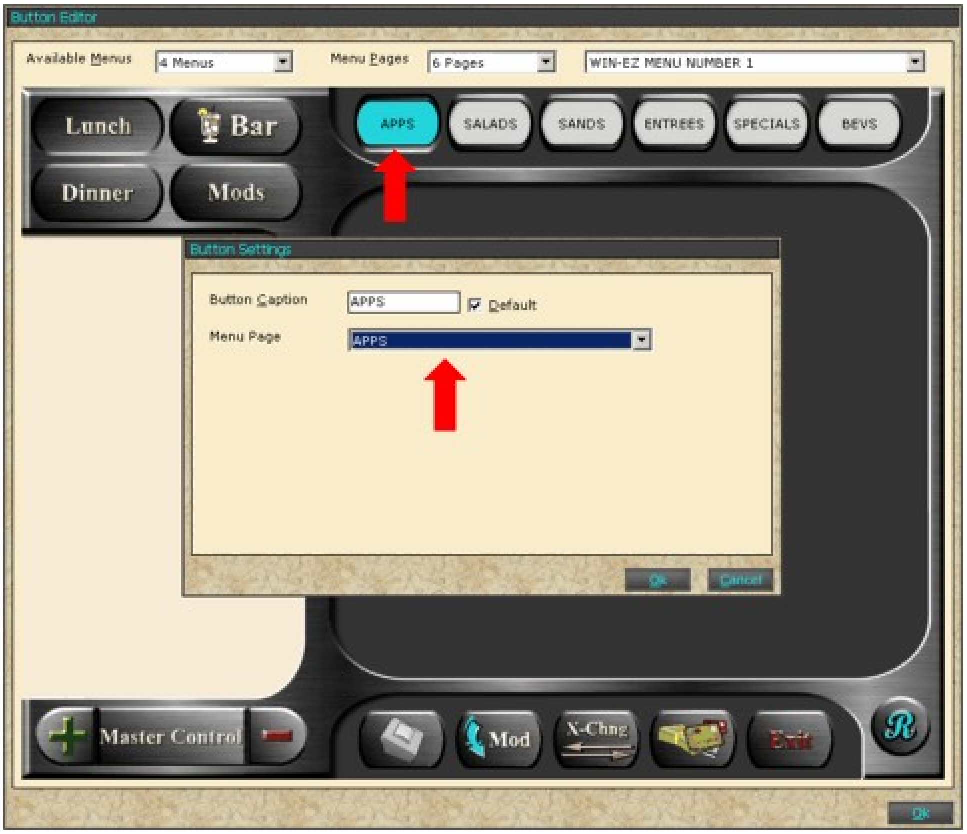


Graphics are designed for Lunch, Dinner, Food, Breakfast, Bar, Mods, Pizza, Beverage, Retail, Entree, Other, and Standard. If Standard is chosen any menu name can be entered. The Standard button background is blue while the others are the Win-EZ gun metal gray.

Step 2
Double Click the Main Menu. This will open a new box where "Win-EZ menu #1-9", "Mods" or "Bar" are assigned along with the graphic associated with that menu.

Step 3
Each Main Menu has the option of 1, 6, 12, or 18 "Menus" for each menu. The example below shows 6 "Menus" for Win-EZ Menu #1

Step 4
Double click on any "Menu" to assign the Menu page to that position. Menu Page programming is done in the "Product/ Menu Page" section of Win-EZ Manager.



There also a "Default" check box. When that box is check, the "default" menu will be the first menu page displayed when an order is being rung up. There can only be ONE default per Win-EZ Menu.

Step 5
On each "Win-EZ Menu" there is space for 6 "Commands". Commands are also called features. Commands are things like "Print", "Insert Modifiers" "Seat up/ down". Because every site is different and has different needs the command line can be changed to best fit each site.

To change commands:
Double Click any command

A box will appear with the command showing on the drop down section called "Command". Choose which command best suits the need of the restaurant. Some commands have a pre built graphic but can be changed to a color from the list.

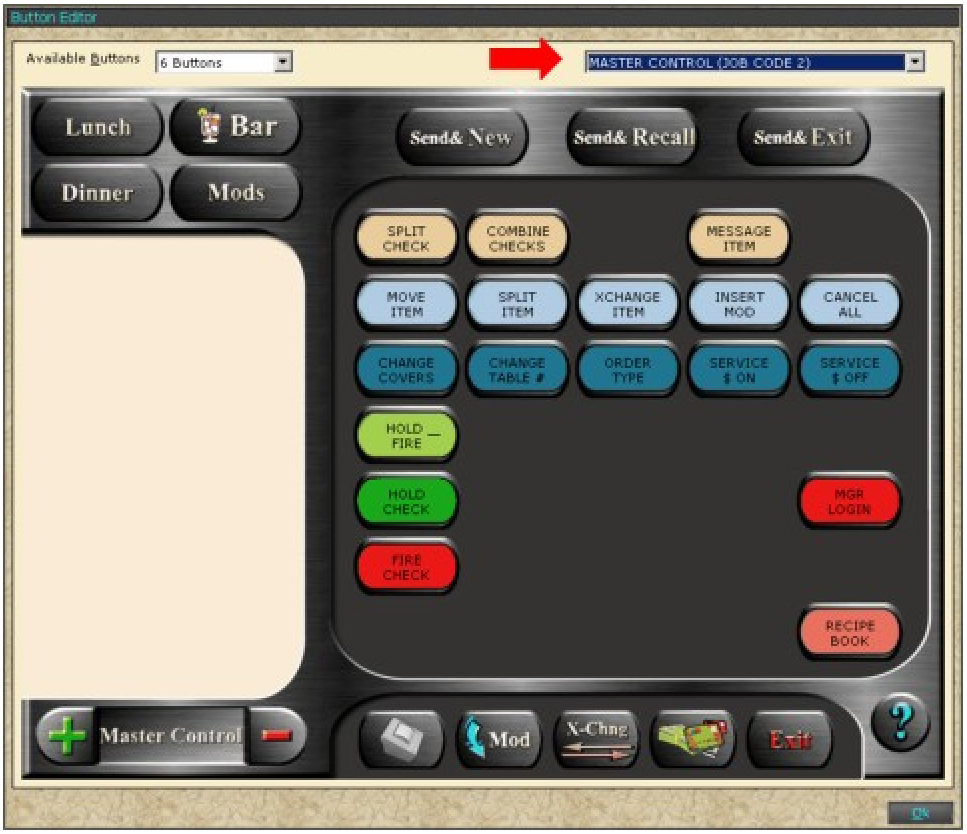
At this point, Win-EZ Menu #1 is complete. Continue each Main Menu as explained above.

1.5.2.1 Master Control

Master Control Button Editor to set commands for each JOB CODE. Job codes are defined in Win-EZ Manager/ Staff section. Each Job Code can be configured to allow access to commands best suited for each job. For example: Most restaurants do not have cash drawers attached to Server Master Control but there is a "No Sale" command for the bartenders for access to the cash drawer. Master Control commands are used on open/active checks to do things like "Split Check" "Print Check" Add Service Charge" etc.

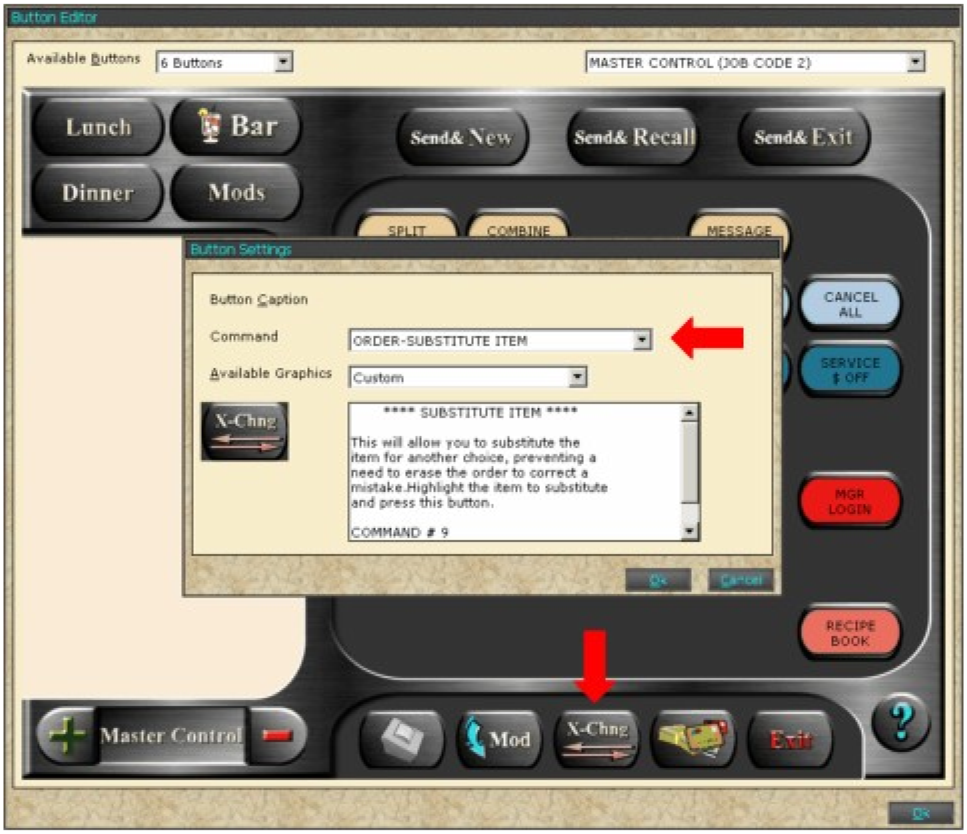
To program each job, first make a list of all the job codes from the Win-EZ Manager/ Staff section. Each job code is assigned a number. The following examples are for Job Code #2-Server

When Button Editor screen is displayed drop the list from the right side of the screen which shows "Win-EZ Menu Number 1". Scroll down to "Master Control Job Code 2".



The bottom row of 5 buttons are programmed like the command line on the Menu page.

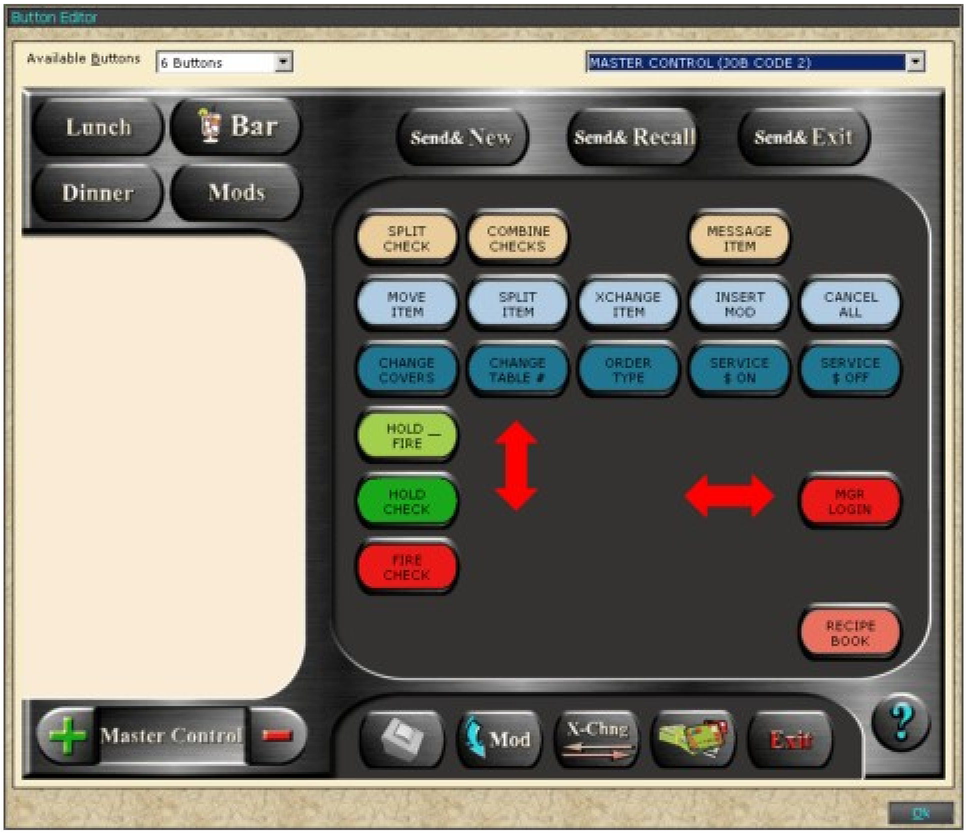
To change commands:
Double Click any command



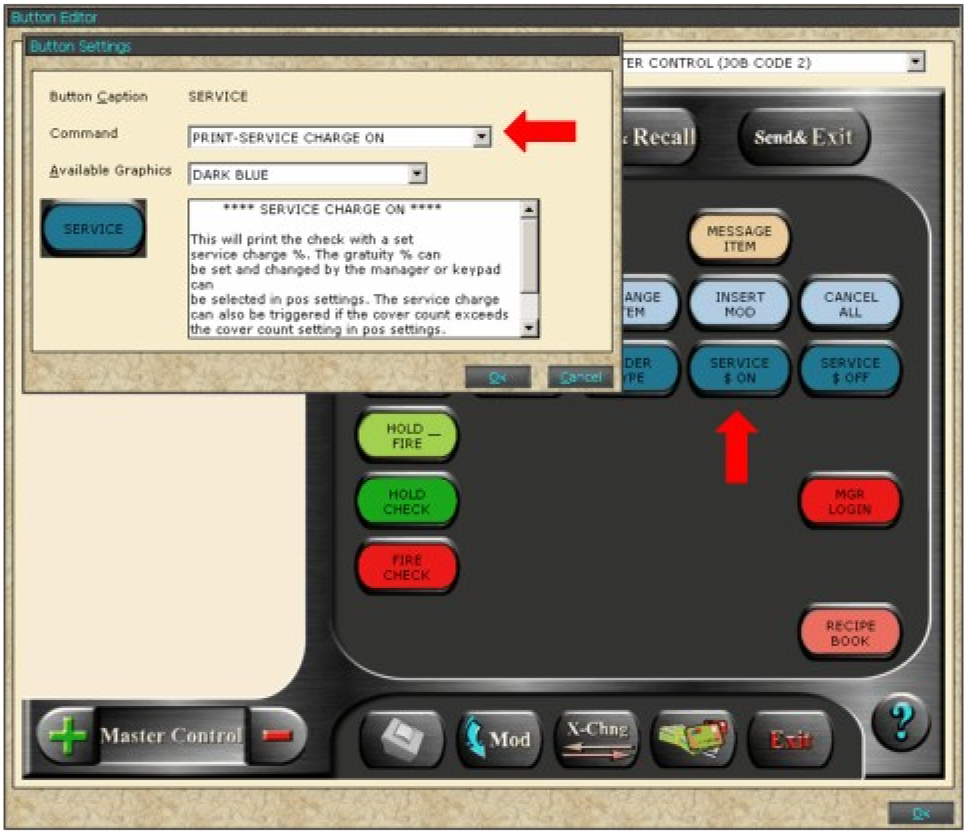
A box will appear with the command showing on the drop down section called "Command". Choose which command best suits the need of the restaurant. Some commands have a pre built graphic but can be changed to a color from the list.

To add or remove commands from the middle section of the "Master Control" page.

Double Click a command showing on the screen or in a blank section on the screen.



The command box will then display either the command or the command of "No button" if an empty spot was selected.



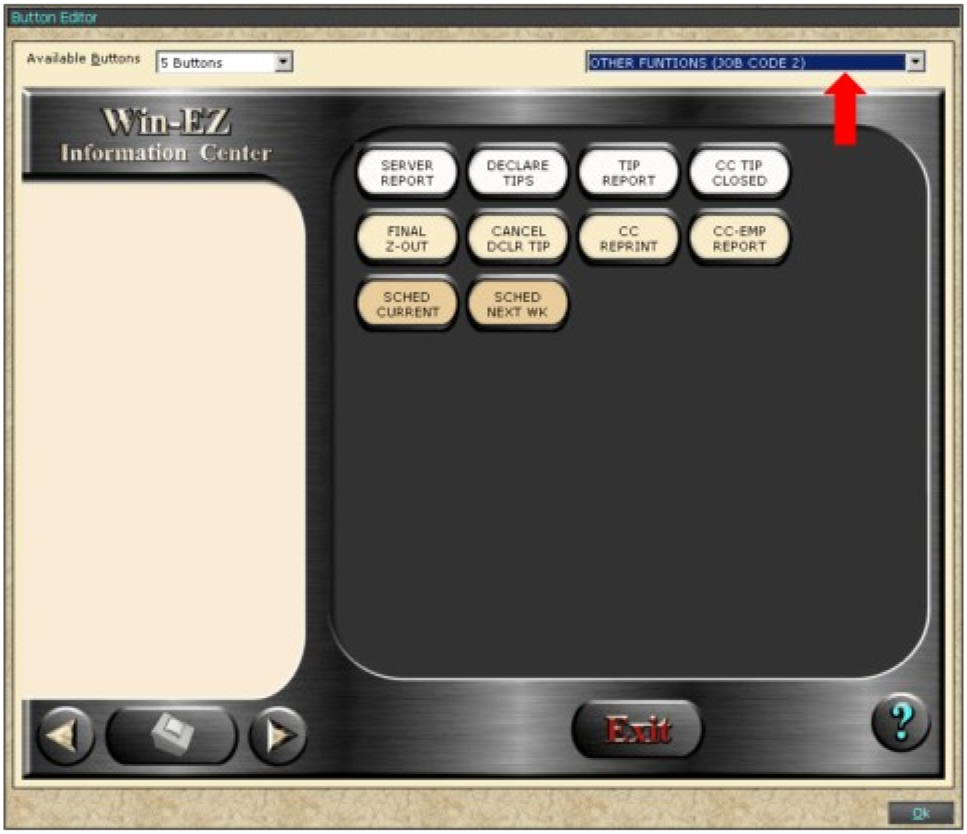
From the list of commands choose the command or if the command is not necessary scroll to the top of the list and select "No command"
Graphics and colors are then decided from this screen.

1.5.2.2 Other Page

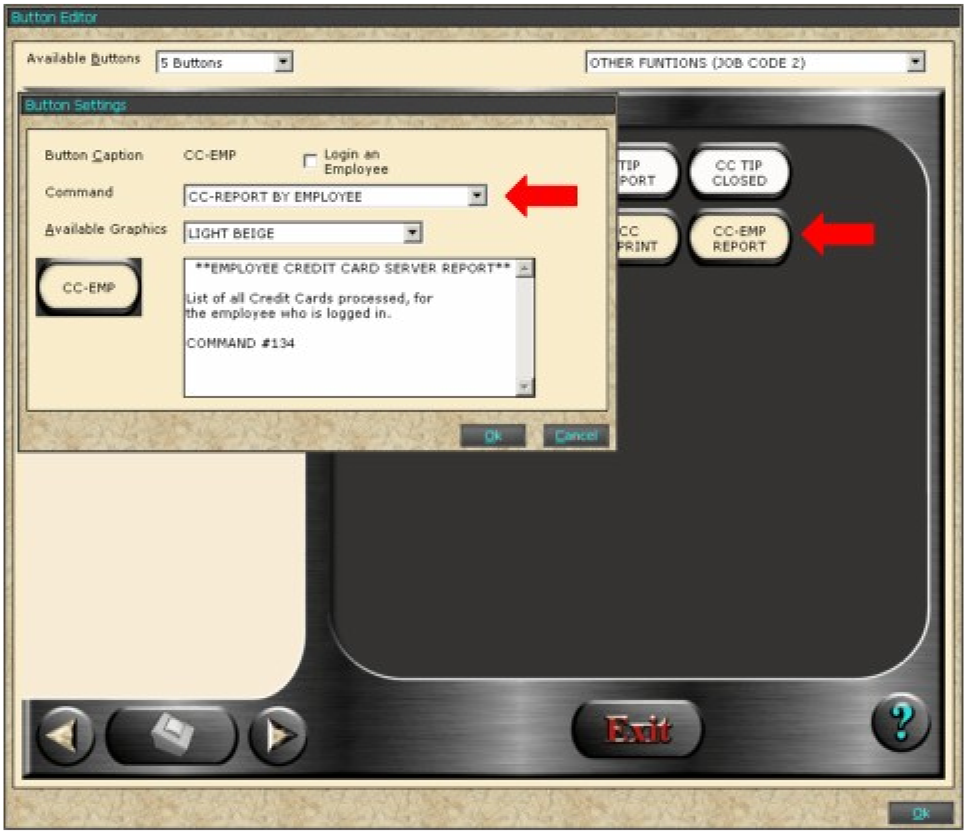
While the "Other Page" works in the same way as the "Master Control page" the commands on the "Other Page are used to work with checks already closed or reports.

The "Other Page" is accessed by staff from the "Start Screen". Each Job Code has it's own set of commands on the "Other Page" just like "Master Control". The following example is for a Server-Job Code #2.

To program the "Other Page", knowing the Job Code Number, select "Other Functions Job Code 2"



Just like "Master Control" choose the command on the screen or an empty spot to add/remove the command.



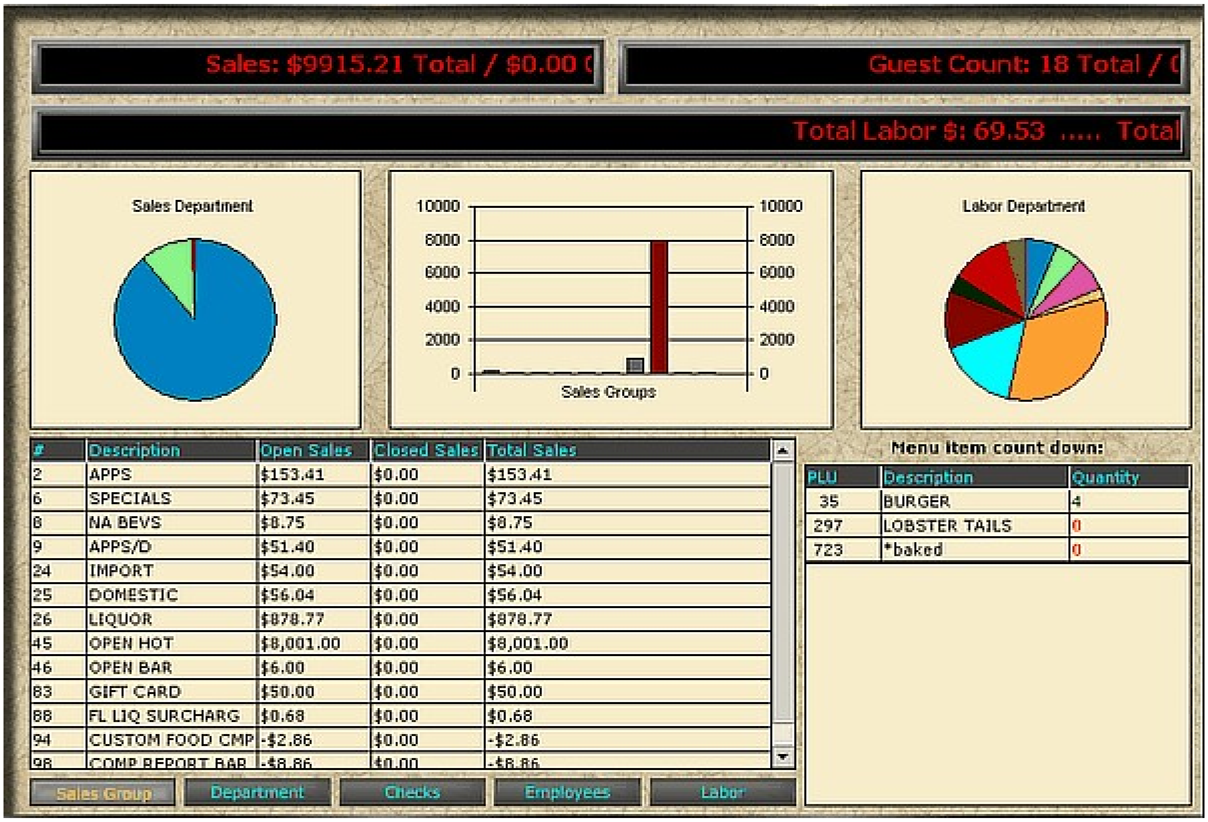
A box will display with the command options.

A check box section called "Log in Employee" if checked will show the list of all clocked in employees to access the employees' check for that command from the POS terminals. This is usually used by a manager because servers and bartenders do not have access to certain functions such as "Final Cash Out" or "Void Credit Card" and the manager must choose which employee's check or reports need to be addressed.

For a full list of "Commands" or "Features" the next section lists all commands to date along with where the command can be used (Master Control or Other) and whether there is a graphic created for the command.

1.5.3 Real Time Stats

This will display up to the second stats on sales, labor, and checks.



The **top left scrolling bar** will display total sales and then break it down into closed check sales and open check sales. It will also display the total labor percentage.

The **top right scrolling bar** will display check and guest totals, including open check and closed check totals and averages.

The **lower scrolling bar** will display all job codes clocked in for the day, their total pay, how many hours worked and the percentage of total labor that job code accounts for. It will also display the total labor payed out and the total number of hours worked for all job codes.

The **left pie chart** will display the sales groups. By double clicking the picture you can view the legend.

The **middle bar chart** will show the sales groups. The numbers to the side represent whole dollars. Double clicking the chart will reveal the legend.

The **right pie chart** will display the job codes. double clicking the chart will reveal the legend.

The **lower left box** will display information depending on which choice is chosen below. Choose from sales groups, department groups, checks, employees, and labor.

Sales groups- Shows open sales, closed sales and total sales for each sales group.
Department groups- Shows open sales, closed sales and total sales for each department.
Checks- Shows detailed information about all open checks.
Employees- Show an employees sales, Check average, guest average and number of tables.

Labor- Shows labor hours,total dollars and percent of sales by job codes.
The lower right box will display the countdown items selected during the initial Product Items setup (found in the Evaluators section. This will show the item, its Product Items number and how many are still available.

NOTE: Hovering the mouse over a check will show all the specific details for the check.

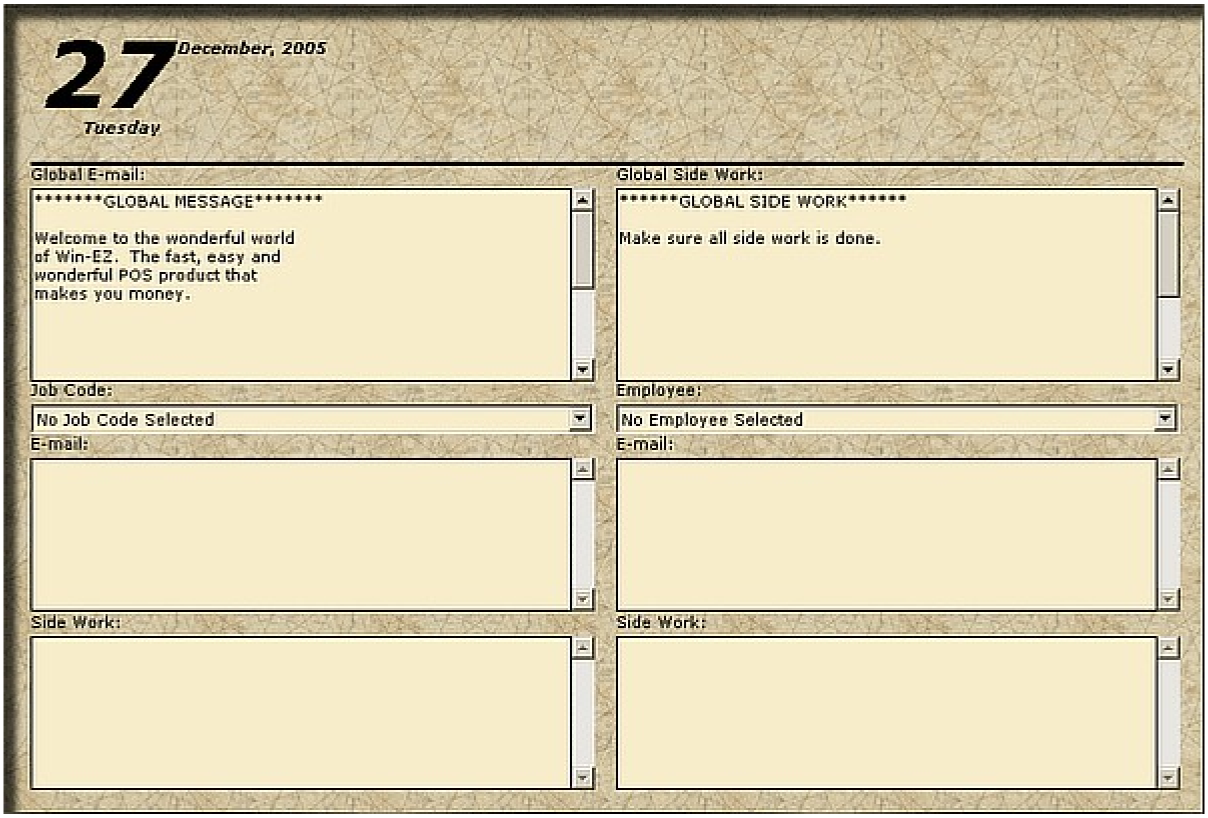
1.5.4 Recipe Book

This is a database of common cocktail recipes. These will be used at the terminals whenever an employee uses the recipe book command.

New: Insert a new recipe.
Edit: Change a current recipe.
Delete: Remove a recipe.

1.5.5 Messaging Center

From here e-mails and side work messages can be created and sent all employees, certain job codes or a specific employee**.**



Global E-mail: This will be sent to all employees and can be viewed by going to the others screen.

Global Side work: This will be sent to all employees and can be viewed by going to the others screen.

Job Code E-mail: Use this field to choose a specific job code to send e-mail. This can be viewed by going to the others screen.

Job Code Side Work: Use this field to send a side work note to a specific job code. This can be viewed by going to the others screen.

Employee E-mail: Use this field to choose a specific employee to send e-mail. This will force the employee to read the e-mail when they open their first check or clock in.

Employee Side Work: Use this field to send a side work note to a specific employee. This can be viewed by going to the others screen.

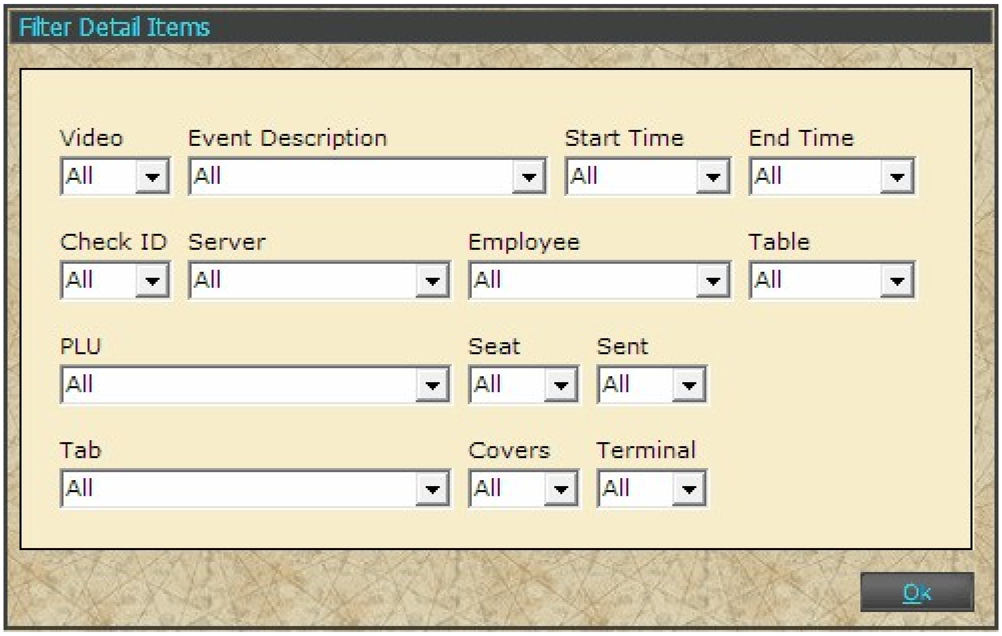
Select Messaging Center again to broadcast the messages after e-mail and side work messages are written.

1.5.6 Detail Viewer

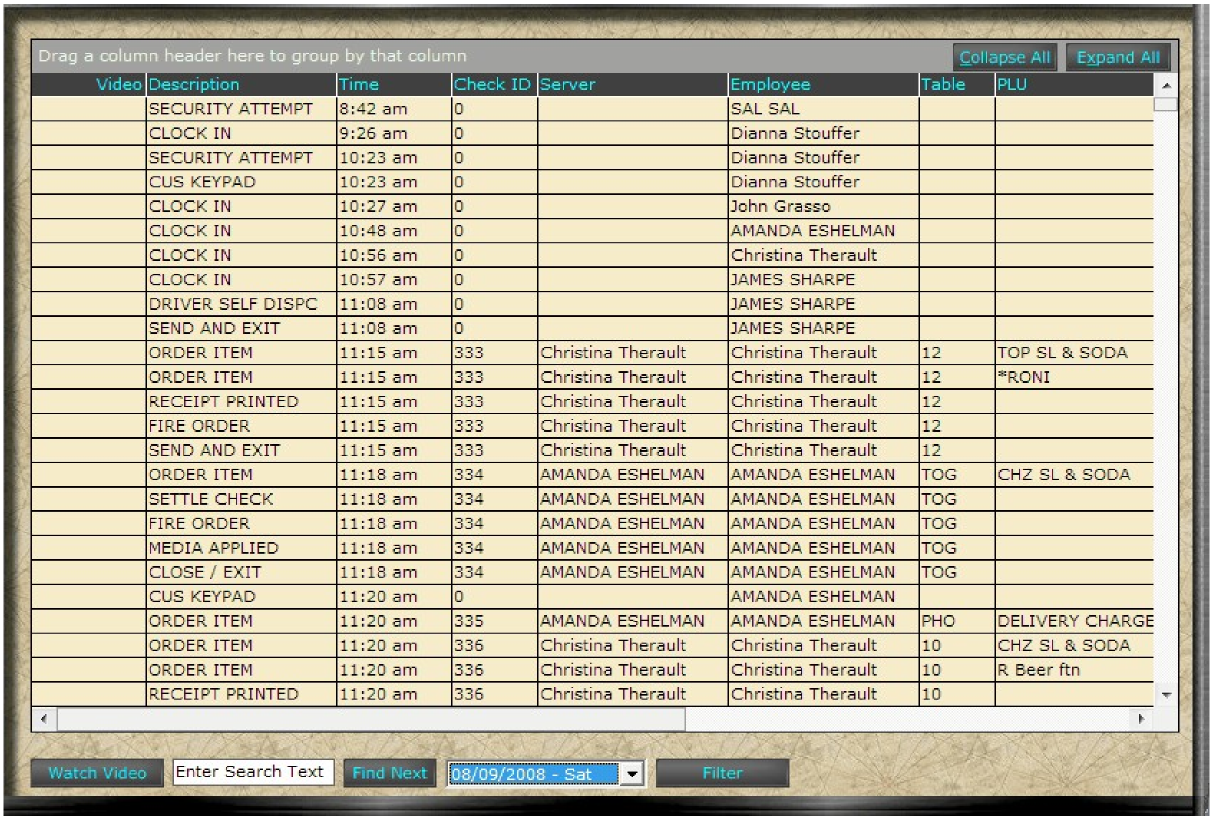
From here a wide range of detail audit items can be viewed for a particular day.

Start by selecting a date from the box at the bottom of the screen, the following screen will appear.

There can be thousands to tens of thousands of Detail transactions created each day. By selecting filter criteria from this screen, you can limit the amount of data that is displayed and speed up the time taken to display the data.



By default all data is displayed.



Video	Description	Time	Check ID	Server	Employee	Table	PLU
	SECURITY ATTEMPT	8:42 am	0		SAL SAL		
	CLOCK IN	9:26 am	0		Dianna Stouffer		
	SECURITY ATTEMPT	10:23 am	0		Dianna Stouffer		
	CUS KEYPAD	10:23 am	0		Dianna Stouffer		
	CLOCK IN	10:27 am	0		John Grasso		
	CLOCK IN	10:48 am	0		AMANDA ESHELMAN		
	CLOCK IN	10:56 am	0		Christina Therault		
	CLOCK IN	10:57 am	0		JAMES SHARPE		
	DRIVER SELF DISPC	11:08 am	0		JAMES SHARPE		
	SEND AND EXIT	11:08 am	0		JAMES SHARPE		
	ORDER ITEM	11:15 am	333	Christina Therault	Christina Therault	12	TOP SL & SODA
	ORDER ITEM	11:15 am	333	Christina Therault	Christina Therault	12	*RONI
	RECEIPT PRINTED	11:15 am	333	Christina Therault	Christina Therault	12	
	FIRE ORDER	11:15 am	333	Christina Therault	Christina Therault	12	
	SEND AND EXIT	11:15 am	333	Christina Therault	Christina Therault	12	
	ORDER ITEM	11:18 am	334	AMANDA ESHELMAN	AMANDA ESHELMAN	TOG	CHZ SL & SODA
	SETTLE CHECK	11:18 am	334	AMANDA ESHELMAN	AMANDA ESHELMAN	TOG	
	FIRE ORDER	11:18 am	334	AMANDA ESHELMAN	AMANDA ESHELMAN	TOG	
	MEDIA APPLIED	11:18 am	334	AMANDA ESHELMAN	AMANDA ESHELMAN	TOG	
	CLOSE / EXIT	11:18 am	334	AMANDA ESHELMAN	AMANDA ESHELMAN	TOG	
	CUS KEYPAD	11:20 am	0		AMANDA ESHELMAN		
	ORDER ITEM	11:20 am	335	AMANDA ESHELMAN	AMANDA ESHELMAN	PHO	DELIVERY CHARGE
	ORDER ITEM	11:20 am	336	Christina Therault	Christina Therault	10	CHZ SL & SODA
	ORDER ITEM	11:20 am	336	Christina Therault	Christina Therault	10	R Beer ftn
	RECEIPT PRINTED	11:20 am	336	Christina Therault	Christina Therault	10	

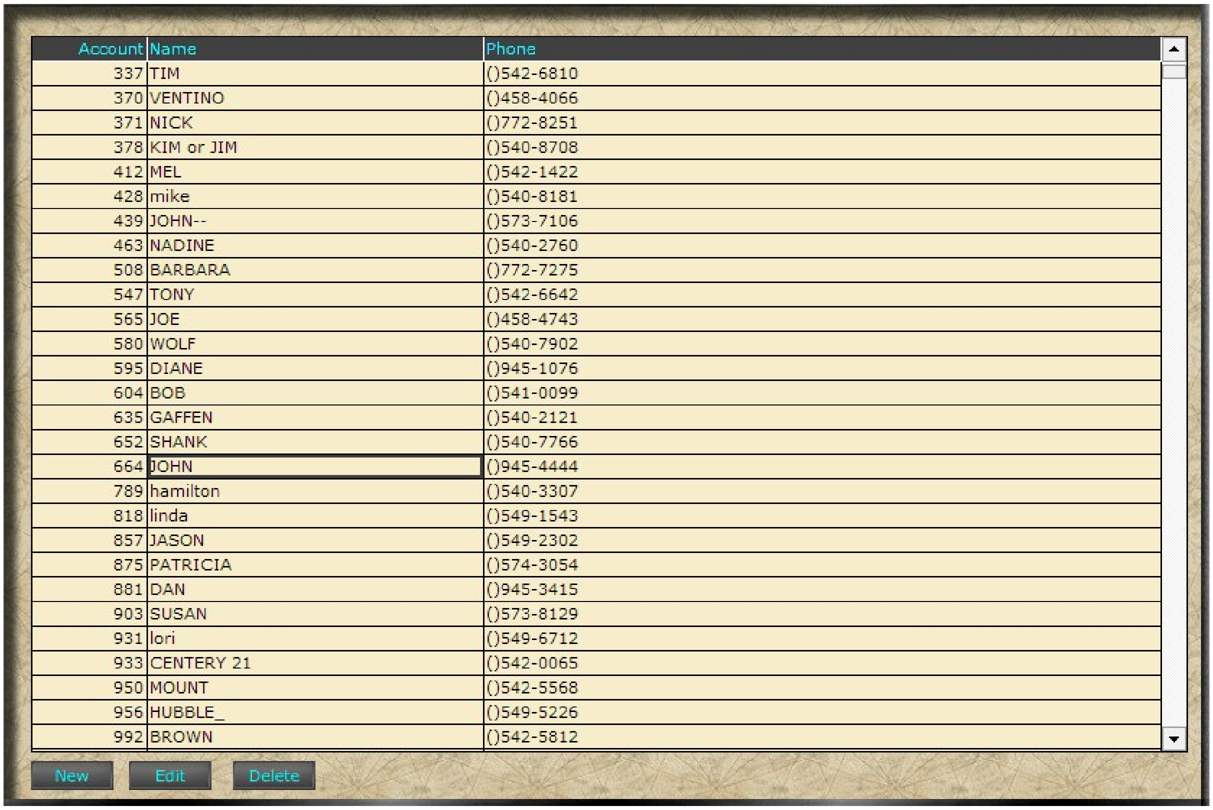
If an interface to a Remote Eyes camera system is installed, the audit event will have a corresponding video event, and selecting the "Watch Video" button will open the Remote Eyes viewer for that video.

The Find Text button will search the audit data for the text in the search box

The Filter button can be used to change the filters that are applied to the data.

1.5.7 Customers

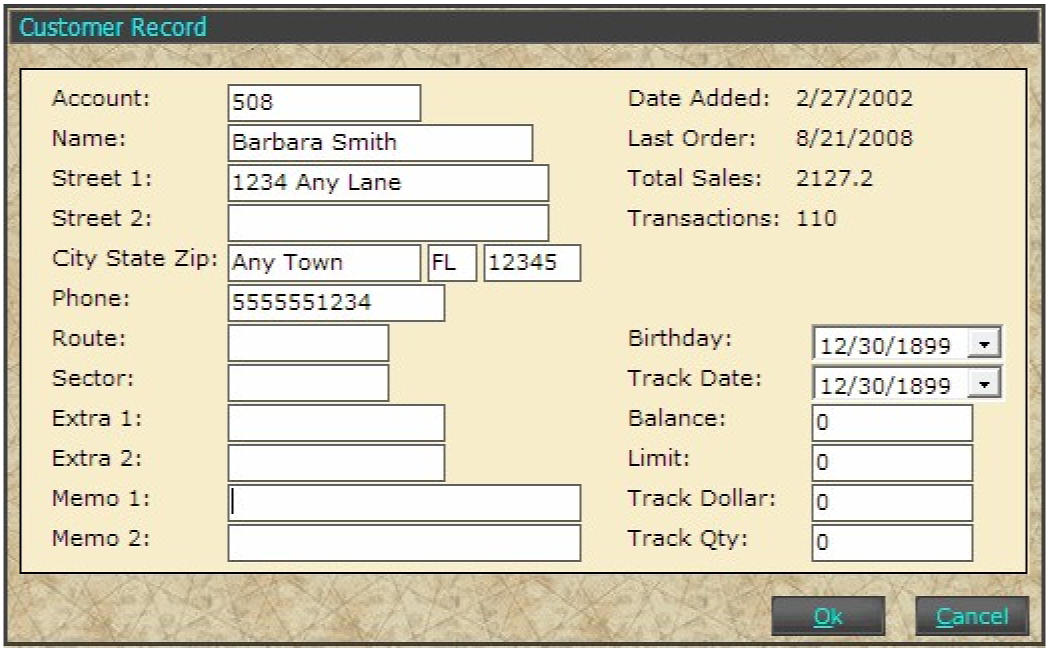
Win-EZ has the ability to store a Customer Database for House Accounts, Private Gift Card programs, or for Delivery Customers. From this section you can edit the customer data, and view historical data.



Account	Name	Phone
337	TIM	()542-6810
370	VENTINO	()458-4066
371	NICK	()772-8251
378	KIM or JIM	()540-8708
412	MEL	()542-1422
428	mike	()540-8181
439	JOHN--	()573-7106
463	NADINE	()540-2760
508	BARBARA	()772-7275
547	TONY	()542-6642
565	JOE	()458-4743
580	WOLF	()540-7902
595	DIANE	()945-1076
604	BOB	()541-0099
635	GAFFEN	()540-2121
652	SHANK	()540-7766
664	JOHN	()945-4444
789	hamilton	()540-3307
818	linda	()549-1543
857	JASON	()549-2302
875	PATRICIA	()574-3054
881	DAN	()945-3415
903	SUSAN	()573-8129
931	lori	()549-6712
933	CENTERY 21	()542-0065
950	MOUNT	()542-5568
956	HUBBLE_	()549-5226
992	BROWN	()542-5812

Creating a new customer, or editing an existing one will present the editing screen:

1.5.7.1 Edit a Customer



Account, Name and Phone are used as "look up" fields from the POS. Don't change them more than necessary.

For delivery customers the Memo Fields show up on the Delivery Screen and the printed receipt, and can contain special directions for the delivery driver.

For House Accounts the balance and limit fields are used to set and monitor limits for the account.

Other fields are customized by client, and may have different labels and descriptions based on a particular use. Check with your support staff to verify the usage of individual fields.

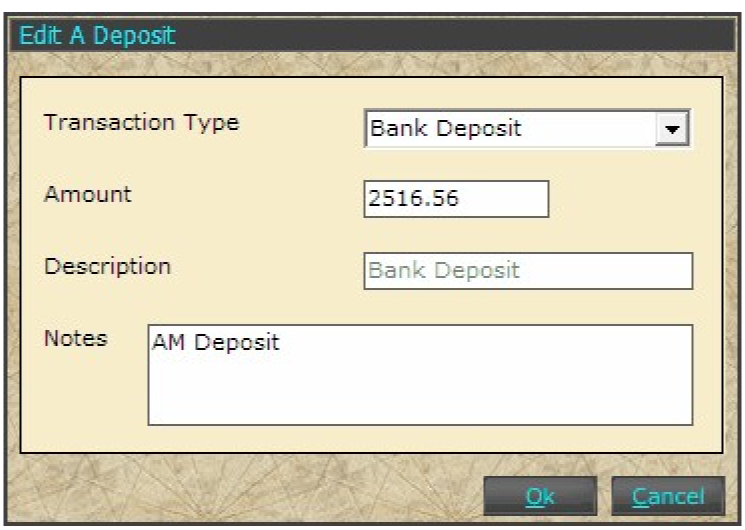
1.5.8 Deposits

The Deposits Module allows you to enter your daily bank and credit card deposits, so that you can generate a "Reconciliation Report" from the Media Reports. This feature is also required in order to use the Accounting Interface.

By default the current day will be loaded when the Deposits Module is loaded. You can load another day by selecting a new date from the calendar.

Selecting New or Edit will present the editing window.

1.5.8.1 Edit a Deposit



Select the type of transaction from the drop down:
Some transaction types allow you to change the description for that deposit.
Credit Card Deposits display a list of media that have been set as "Deposit Credit Card Media". If there is no media in the drop down list they need to be set up in the Settings > Media section.

Enter an amount and description for the Deposit.

1.6 The Reports Button

Win-EZ Manager breaks reports down to different sections depending on the information needed. There are 7 sections (including Inventory) with numerous reports in each sections. Within each report, the system will allow for "advanced-custom" reporting.

If Win-EZ Manager is started prior to someone clocking in or before a sale is closed for the first time the current date will not be displayed in the list of available reports. To reset close and restart Win-EZ Manager.

Product Reports: View reports on Sales, departments, taxes, itemized reports and comps.

Check Reports: View reports on closed checks.

Media Reports: View reports on Media.

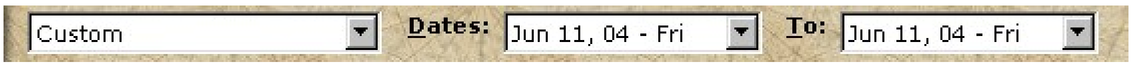
Labor Reports: View reporting on employee labor, tips and payroll.

Inventory Reports: View reports on inventory, counts, cost and invoices.

Database Lists: View database lists of products, Modifier database and employee database.

Memorized Reports: View reports that are custom made from the reports above.

The Different Ways To Set Up Reports



The left pull down is to set up what dates the report will show. The custom choice makes available the dates in the center and the right. Set the start date and end date to which ever days the report is needed.

Use the left pull down it will give more options: Report default date-????????, Today, Yesterday, Current Month, Current Year, Previous Month, Previous Year, Last 7 Days, Last 30 Days, Last 3 Months, Last 6 Months, Last 12 Months, Week Ending <date>, Month Ending <date>, Year Ending <date>.

Once the report is selected press "**View"** Report - which will create the report and change to the view report screen.
Create a **New**... which will create a report based on what setting that is designated. Delete Report - only available in the Memorized Report section. Customizing a report will create a new, user defined report with a multitude of specific choices.

The Reports Control Panel

Prev & Next: If a multiple page report, use these to move between pages.

First: This will go to the first page of the report.

Last: This will go to the last page of the report.

Enter Text Box & Find: Type a word in the white box and click find to be taken to the first one in the report. Click it again and it will advance to the next word. And so on.

Fit: This will resize the report to fit the screen, width wise.

- & + magnifiers: zoom in and out on the current menu.

2 Pages: Used to view 2 pages laying next to one another. When clicked the button will change to "1 Page", click this to return to the original format.

Copy: Use this to make a copy of the menu (like the right click and copy function) and then go to another program (exp. paint or word) and from there right click and select paste. This will move the menu to another program for more customized work.

Full Screen: This will resize the report to fit in the entire screen getting rid of the control panel on the left and moving it to the top of the screen.

Customize:

Save:

Print...: This will send the report on the screen to your report printer. This will also print your pie and chart reports.

Done: This will bring you back to the main report page

rpt: Shows the report being viewed.

Pie: Shows the report in a pie chart. Clicking the pie button again will change the colors of the pie chart. The bottom two buttons offer different views of the pie chart. The left button scrolls form smooth, 2D, 3D, and Taurus. While viewing the pie chart, click and hold on the screen to move the pie chart around. Turning it and making it bigger or smaller. The chart on the right shows a list of the items in the report, then corresponding color, and the sales amount.

Bar: Shows the report in a bar chart. Clicking the bar button again will change the colors of the bars. The bottom left button will change the bar graphics from smooth, gem, 3D, cylinder, cone, inverted cone, pyramid, and inverted pyramid. While viewing the bar chart, click and hold on the screen to move the bar chart around. Turning it and making it bigger or smaller. The chart on the right shows a list of the items in the report, then corresponding color, and the sales amount.

Line: Shows the report in a line chart. The bottom two buttons offer different views of the line chart. The left button scrolls form tube, tape, and line. The right button will show the line chart either in a jagged style or a step style . While viewing the line chart , click and hold on the screen to move the line chart around. Turning it and making it bigger or smaller. The chart on the right shows a list of the items in the report, then corresponding color, and the sales amount.

The four icons on the bottom will export the report to that type of program. The programs must be installed on the computer in order for them to be exported. The order of the icons is as follows: Excel, Adobe Acrobat, Note Pad, and Word Pad.

1.6.1 Product Reports

Product Report: This will show all of the Product Items that were used for that time period. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Sales Group Report: This will break down sales into the sales groups. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Department Report: This will break down all sales into the department groups. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Group by Server Report: This will break down sales into the sales groups for each sales person. It will include the number sold, the number voided, the net amount, total media sales for each item and the percentage of total sales for each item. Also shows sales tax and total sales.

Department by Job Code: This will break down into the department groups for each job code. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Department by Server Report: This will break down into the department groups for each sales person. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Weekly Group Report: This will break down sales into the sales groups for each day. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Order Type Group Report: This will break down sales into the sales groups for each order group (exp. here, to go, bar). It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Itemized Group Report: This will organize the Product Items under the sales group headers. It will include the number sold, the number voided, the net amount, total media sales for each item, and the percentage of total sales for each item. Also shows sales tax and total sales.

Theoretical Cost: If the "Cost" line in the Product items is entered the cost option this report will show a list of Product Items sold for the time specified. It will also show number sold, number voided, the net amount (based on the amount entered in the cost field) and the percentage of total sales for each item.

Tax by Sales Group: This will break out the different sales groups, show the amount of sales for each sales group and show the amount of tax that was collected for each sales group.

Tax by Department: This will break out the different departments, show the amount of sales for each department and show the amount of tax that was collected for each department.

Comp Report: This will break down the reasons for the comps and voids. Under each group there will be a list of those comps and voids showing quantity of comps and voids, total amount of the comps and voids, check number, server number & employee that did the customized comp or void.

1.6.2 Check Reports

Check Listing: This will give a list of all closed checks. This includes closed checks with no media and split check with no items. It also shows check number, server name, cashier name, table number, open check time, close check time, void transactions, guest count, total of the check. It will also include a (!) next to a check to indicate an over ring, and a (*) to indicate a check missing from the sequence(a check not closed out).

Check by Server: This will give a list of all closed checks per sales person. This includes closed checks with no media and split check with no items. It also shows check number, server name, cashier name, table number, open check time, close check time, void transactions, guest count, total of the check. It will also include a (!) next to a check to indicate an over ring, and a (*) to indicate a check missing from the sequence (a check not closed out).

Hourly Check Report: This will give a list of all closed checks listed under the hour they were opened. This includes closed checks with no media and split check with no items. It also shows check number, server name, cashier name, table number, open check time, close check time, void transactions, guest count, total of the check. It will also include a (!) next to a check to indicate an over ring, and a (*) to indicate a check missing from the sequence(a check not closed out).

Hourly Report: This shows the day broken into hours. It includes the total number of checks, check average, guest count, guest average, number of voids, hourly sales and percentage of grand total sales for each hour.

Server Report: This shows each sales person, their number of checks, check average, guest count, guest average, number of voids, total sales and tips claimed.

Closed Checks: This gives in depth details about all closed checks. It shows check number, sales persons name, cashier, open check time, closed check time, table number, guest count, total of the check, payment type, second payment type, number of voids, positive media Product Items, negative media Product Items, what terminal check was started on, order type, customer account, and gratuity. **Hover** above any check to get a pop up of that check which is itemized and double click a check to open a report for that single check which is itemized. The hover feature can be disabled and the check can be viewed by double clicking the check to open This report can also be regrouped as explained at the beginning of the manual. Click the guest count button to change the guest count of a specific check. The "!" will indicate an over-ring, (ie an negative check) Double click any check to view the entire check.

1.6.3 Media Reports

Media Reports: This will show the sales by media type. Also shows number of checks for each media type.

Media by Terminal: This will show the sales by media type for each terminal. Also shows number of checks for each media type and sub totals for each terminal.

Media by Cashier: This will show sales by media type for each sales person. Also shows number of checks for each media type and sub totals for each sales person.

Deposits Report: This will show information related to deposits made through the Deposits Module.

Reconciliation Report: This report is used to show the difference between sales report data, and deposits made through the Deposits Module (Over / Short reports).

1.6.4 Labor Reports

All Employee Timeslips: This will show all employees for the dates selected, it will show there shifts with their job code, time in, time out, total hours, pay rate and total pay.

One Employee Timeslip: This will first ask to select which employee then it will display all the shifts worked by that employee for the dates selected. Including their job code, time in, time out, total hours, pay rate and total pay.

Labor Summary: This will list all the employees by their job code worked. It will show the number of shifts worked, total hours for those shifts, pay rate, and total pay. If an employee has worked two different job codes there will be two entries for that employee.

Labor Summary by Job Code: First select which job code. This will show all employees that worked that job code for the selected dates. It will show number of shifts, total hours worked on those shifts, pay rate and total pay.

Tip Declarations: This shows the tips declared by each employee for the selected dates. These tips are declared by either selecting other (at the POS) and selecting "2 - declare tips" and then "declare tips". And/or selecting other and "3 - to do a final". It will show the declarations individually and give a total at the end of each employee.

Tip Transfer: This shows each tip transfer for the selected dates. It will show the employee that is making the transfer and then the employee that is receiving the transfer. These tips are transferred by selecting other (at the POS) and selecting "2 - declare tips" and then "do tip outs".

Tip Report: This will show all employees who receive tips for the dates selected. It will list the employee name, number of tip declarations made, total for all tip declarations, tip discounts, gratuity on checks (credit card or gift cert. tips), tips in (collected), tips out (dispersed), and the total of all tips collected minus tips dispersed. At the bottom of the report will be a grand total of all tips.

Payroll Report: This shows all employees and their job codes that worked the selected dates. It will show the number of shifts worked, number of regular pay hours worked, regular hours pay rate, money paid for regular hours worked, overtime hours worked, overtime pay rate, money paid for overtime hours worked, total hours worked (regular and overtime), total money paid (regular and overtime), their total sales, and their total tips.

Current Status: This will show a list of all employees on the clock, the job code they are clocked in as, and how many open checks they have. Any employee with an asterisk (*) next to their name needs to have a final z-report run

Time Clock Adjustments: This shows all adjustments made in Modify Labor Data. If a shift is added, changed, or deleted it will be logged here. It will show the time and date of the adjustment, if it was added, deleted, or changed, and it will show the original time and the adjusted time.

1.6.5 Inventory Reports

All of these reports work along with the counts and invoices sections under the Product button.

Theoretical On Hand: It will prompt for a date to start. The report will be broken down by Sales Groups. It will list the item number and description, cost (entered in the invoice or edit Product Items section), price (the price entered into price level 0), on hand (this will take the last count numbers, add invoices and subtract each sale), ext cost (on hand multiplied by cost), and ext price (on hand multiplied by price).

Quantity Variance: It will prompt for a start and end date first. These dates are the dates that have counts entered. The report will be broken down into Sales Groups. It will list item number, description, starting (counts from first date chosen), purchase (all invoices between the two chosen dates), sold (number sold during the two chosen dates), ending (counts from the second date chosen), theoretical (this is the starting Product Items purchases minus sold), variance (this is theoretical minus ending).

Dollar Variance: It will prompt for a start and end date first. These dates are the dates that have counts entered. The report will be broken down into Sales Groups. It will list item number, description, starting ($ value of counts from first date chosen), purchase ($ value of all invoices between the two chosen dates), sales cost ($ value of cost sold during the two chosen dates), ending ($ value of counts from the second date chosen), theoretical (this is the starting $ value Product Items purchases $ value minus costs sold $ value), variance (this is theoretical minus ending).

Ending Counts: This will for a date. These dates are the dates that have counts entered. This report will show the item number, description, cost (cost of the item), on hand (how many were added to the counts for the specific day chosen), total (cost value of on hand amounts).

Cost Of Goods Sold: This will prompt for a start and end date. These dates are the dates that have counts entered. This report will be broken into Sales Groups. It will show the item number, description, start (this includes the first dates counts and their cost values), purchase (this includes all purchases between the chosen dates and their cost value), end (this includes the second dates counts and their cost values), usage (this is starts Product Items purchases minus ending for both counts and cost values), and percent of cost.

1.6.6 Credit Card Reports

The reports in this section are specific to the Win-EZ Payment Server product, and do not work with Win-EZ Credit Card.

Credit card reports can be viewed by the date(s) selected in the date range box, or by batch number. To view them by batch number select the "By Batch Number" check box next to the date selection box.

Transaction By (*) Reports: These reports list all successful charge transactions sorted by the description of the report. **

Gift Card Sales: Lists all non charge (load / reload) transactions for Gift Cards.

All Transactions: Lists all transactions that occurred during the day or batch, including error and decline transactions.

** A new sequence number is assigned for each transaction. If a transaction errors or is declined the sequence is still used and the next transaction will be assigned a new sequence number.

1.6.7 Report Groups

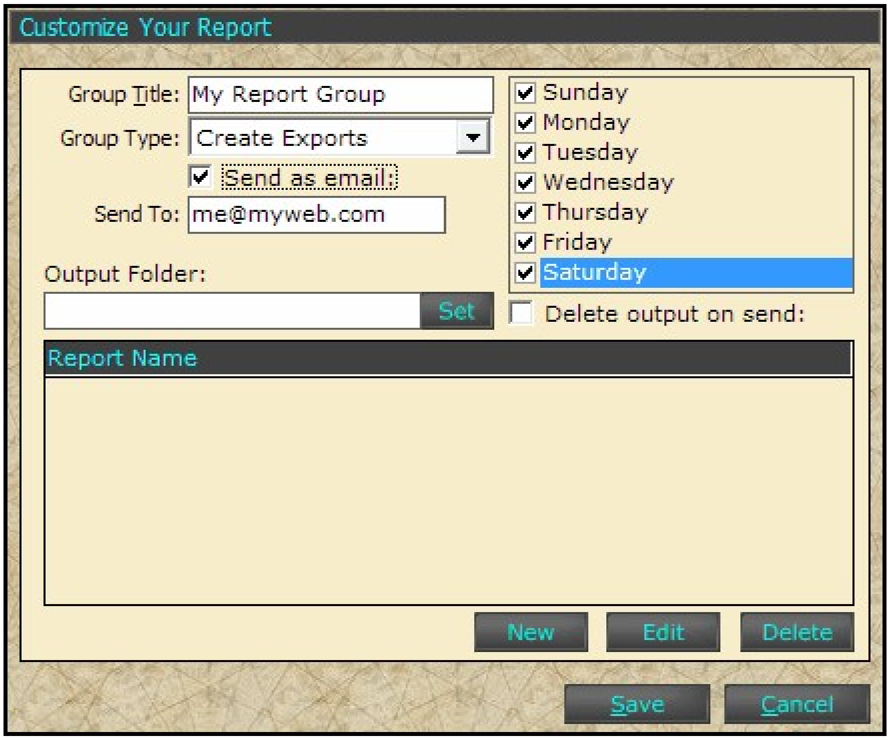
Report Groups are a unique type of report that allows you to group other reports together for viewing or export.

To create a new Report Group select the "Create New" button.

Set the title of the Group, and select which type of Group you want to use.

If you set the Group Type to "Display Reports" all of the "Export Options" are disabled so you can skip to "Adding reports" below.

For the export group there are several options that can be combined to create different outputs:



Exports can be sent to a folder on the local computer, directly to the printer, to an email address, or any combination of these three by selecting multiple options.

Send as email: This option allows you to send the exports to email recipients.

Send To: If the "Send as email" option is selected, you must list a recipient here. Multiple recipients can be specified by placing a comma between them: (recipient1@myweb.com, recipient2@myweb.com)

Output Folder: This option sets the folder for the exports to be written to. If no folder is selected the default export folder is used (this option is set from profile settings). Pressing the "Set" button will display a screen to allow you to set the folder.
This is only needed if "Delete output on send" is not checked.

Days of the week: Select the days that you want this export to run.

Delete output on send: This option will delete the exports to keep from filling the export folder. If exports are being emailed, or printed and you do not want to keep a copy on the computer (of the export, the report data will always be available) select this option.

Adding reports:
Once you have the export or report options set, you can add reports to the group. Select the "New"

button to add a report.

The "Report" drop down will contain all of the built in reports, and all of the memorized reports that have been built in the system. Select the report that you want to include in the Group.

The "Date Range" drop down contains a list of preformatted report ranges. These only pertain to the automatic export, and the time that it runs. In other words, if your "New Day Begins" time is set to 5am, and you run the export at 6am, then you will want to set the range to "yesterday" to get the correct reports. When exports or reports are run from the "Reports" screen, they use the selected date on that screen.

The "Export Type" drop down contains the currently available exports. This only pertains to Export Group Types, as Display Group Types can be exported from the report viewer.

By selecting the "Print copy during export" check box, the report will be sent to the printer during the export.

There are several settings in the Setting > Profile > Settings screen that control what time the Automatic Exports should be run, and if Win-EZ Manager should be started to run them.

1.6.8 Database Lists

Product Database Listing: This will be a listing of all 1999 Product Items. It will include the number, description, alt description, price 0,1,2,3, pin, sales group, department, menu group, mod group, mod sequence, print category, modifiers, tax rate.

Sales Group and Department List: This report will list all the created Sales Groups and Departments.

Menu Screen and Mod Group List: This report will list all the created Menu Screens and Mod Groups.

Mod Sequence Listing: This report will list all the created Mod Sequences.

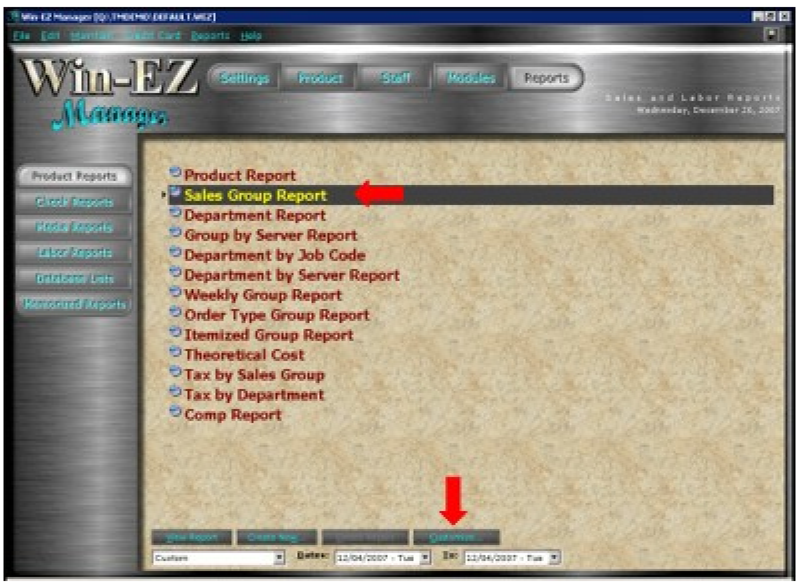
Employee List: This will give a list of all employees, including their id number, birthday, expiration date, Social Security Number, the jobs codes available to them and their pay rate for each job code.

1.6.9 Advanced Settings

Reports can be viewed as is or configured to just the information required. Each report has filters appropriate to the report. There are hundreds of combinations to reports. This section will explain HOW to customize the reports.

To create a custom reports:

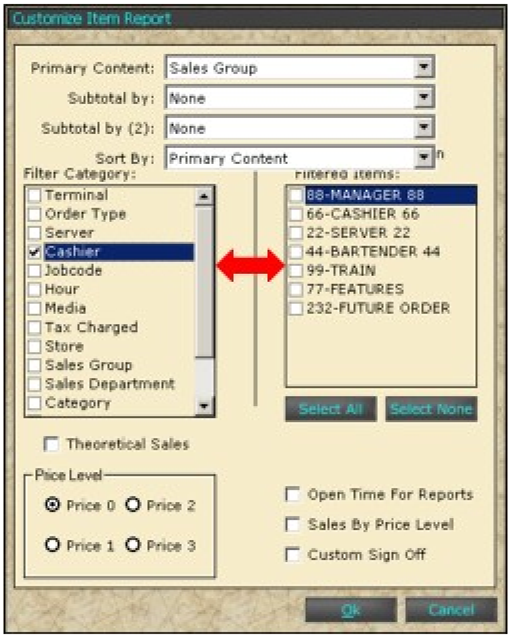
In "Reports" choose the report nearest to the information required and click the choice only once to have the black bar highlight the report. Press "Customize" at the bottom of the page.



A screen will then show the following. Press "Advanced" to set the report as needed.

A Report Filtering Screen will then ask WHAT is needed to be seen on this report. By checking items on the Left Box more options appear on the Right.

Choose the options for a custom report.



When the information is chosen, Press "Ok". The screen where "Advanced" was chosen will show again. Either view the report or "Memorize" the report to view the custom report again.

To **Memorize** the custom report, change the name of the report in the "Report Title" section of that screen. NOTE: The report names must be changed. No two reports can have the same name.

Press "Memorize" when finished

To View the Memorized reports use the "Memorized Reports" and choose the report.

1.7 Win-EZ Payment Server

1.7.1 Introduction

Welcome to Win-EZ Payment Server / Win-EZ Credit Card Interface.

Win-EZ Payment Server is an application that allows Win-EZ POS applications, legacy Touch Menus POS applications, and third party integrators to access high speed Internet Payment Gateways. It also has a management interface (Win-EZ Credit Card Interface) to allow for viewing of batch records, manual transactions, batch settlement, and other related functions.

Contact us:
As with all Win-EZ POS applications, Win-EZ Payment Server issold through authorized dealers only. Your Dealer should be your first line of support for our products. In the rare event that there is no local dealer in your area, we will be glad to refer you to the dealer nearest you. If a suitable dealer cannot be found, we offer direct support for an hourly fee.

Win-EZ Payment Server by
Hospitality Data Systems Inc.
7666 15th St E
Sarasota, FL 34243

1(800) 741-1442

www.win-ez.com

Some icons provided by http://www.visualpharm.com

1.7.2 Settings

1.7.2.1 Credit Card

This tab of the Options screen lets you set options related to the Credit Card platform and Processing Network.

Platform
Win-EZ Payment Server can use it's own internal platform "Direct Interface" to communicate with several Networks, along with the external NETePay platform. Select the appropriate option. Note that some options will require an additional license.

Network
Select the processing network that you are using to process credit cards. Note that for NETePay platforms other than Serling and Mercury, the platform is determined by the version of NETePay that is installed.

Once you select the Platform and Network, the network programming options will show up in the space below. Most of the settings required to run these networks are provided by the merchant account provider.

NETePay:
For Mercury and Sterling a Merchant ID is required, and will be provided with your merchant account.
The Servers list on the right hand side will be populated with the most popular servers, but you can change or add more servers if your provider suggests them.
For the Other NETePay option, the server address should be 127.0.0.1, unless NETePay is installed on another machine on the network. In which case that address should be used. Only one address should be used with this option.
If you have NETePay setup to use a password, you will need to provide it here.

Direct Interface First Data:
This interface is to the FDMS Cardnet platform. Your merchant provider will supply the Merchant ID and Terminal ID. Please have the software set to /nsoftware Ibiz, as this is the component used to connect to the Datawire network. Once a MID and TID have been entered, you must register the Datawire ID. Once the ID is registered it is important that you write this ID down so that you can restore it if you ever loose the settings.

Also note that the batch will be split into pieces based on the "Max transactions per batch part" setting. The default of 100 should be sufficient for most clients. If you have a very slow, or unstable internet connection you may need to lower it. You will receive errors during batch if this is an issue.

Direct Interface TSys / Vital:
All of the settings here will be provide with your merchant account.

1.7.2.2 Gift Card

This tab of the Options screen lets you set options related to the Gift Card platform and Processing Network.

Platform
Win-EZ Payment Server uses the external GIFTePay platform to process Gift Cards. If you do not accept Gift Cards through Win-EZ Payment Server select none.

Network
Select the processing network that you are using to process credit cards. Note that for GIFTePay platforms other than Serling and Mercury, the platform is determined by the version of GIFTePay that is installed.

Once you select the Platform and Network, the network programming options will show up in the space below. Most of the settings required to run these networks are provided by the merchant account provider.

GIFTePay:
For Mercury and Sterling a Merchant ID is required, and will be provided with your merchant account.
The Servers list on the right hand side will be populated with the most popular servers, but you can change or add more servers if your provider suggests them.
For the Other GIFTePay option, the server address should be 127.0.0.1, unless GIFTePay is installed on another machine on the network. In which case that address should be used. Only one address should be used with this option.
If you have GIFTePay setup to use a password, you will need to provide it here.

1.7.2.3 Printing

This tab of the Options Window lets you set information for the Sales Drafts that are produced for each transaction.

Receipt Header Lines
Here you have 4 lines of 40 characters to create a header for the Sales Draft. This text will appear at the top of each printout, and may be used for information about the business.

Receipt Footer Lines
Here you have 2 lines of 40 characters to create a footer that will appear at the bottom of every Sales Draft printed.

Auto calculate tip percentages
Selecting this setting will add three additional lines to the bottom of the Sales Draft, These lines will show a recommended gratuity based on the setting in the 3 "Percentages" fields.

Include Tip line Check box
If the establishment takes gratuities, setting this check box will cause each sales draft to print a line where the customer may write a Tip amount.

Print Two Copies Check box
If carbon paper is not being used, then setting this check box will cause 2 copies of the Sales Draft to be printed. One for the customer to sign and return. The other is for the customer to retain for their records.

Extra Tip line Check box
If the establishment takes gratuities, and uses an included or preset gratuity, then setting this check box will cause each sales draft that already has an included gratuity to print a line where the customer may write an additional Tip amount.

Signature line on both copies.
If you would like to have a signature line on both the establishment and customer copies of the receipt, select this option.

Percentages
Set the percentage for each of the three additional lines that will be added to the bottom of the Sales Draft, These lines will show a recommended gratuity based on these percentages.

Require Signatures
By selecting any setting other that $0.00 (Normal Slips), the signature lines will be removed for transactions below this amount. This feature is generally used for fast food establishments.

Printer Command Codes

Below is an explanation of the 3 code fields. If the fields are left blank, Win-EZ Credit Card will fill the values in with Epson TM-T88 III codes.

Large Codes

The codes that your printers use to print in large should be entered here. The format should be decimal numbers separated by a comma.

Normal Codes

The codes used to return your printers from Large to Normal should be entered here. The format should be decimal numbers separated by a comma.

Cut Codes

The codes used to cut the paper after printing a slip (if any), should be entered here. The format should be decimal numbers separated by a comma.

1.7.2.4 Room Charge

Win-EZ Payment Server supports the InnQuest platform for room charges. All settings here are provided by the InnQuest support staff.

1.7.2.5 Other Settings

This tab contains other settings that are used to configure how Win-EZ Payment Server behaves.

Use Win-EZ Credit Card for processing.

This setting tells Win-EZ Payment Server not to process cards, or listen for card transactions, and is in place to allow for Win-EZ Credit Card (our legacy credit card processing application). This is a temporary setting to ensure that both applications are not running on the same machine at once.

Trainee Mode

This setting will place Win-EZ Payment Server into a "Training Mode". all transactions will only process locally, and no transactions will be sent to the bank. This feature can only be turned on when the batch is empty, and a batch must be completed before the option can be turned off. All Credit Card transactions processed while in training mode are deleted from the system when the batch is closed.

Suppress Tip Reporting.

This is a legacy setting will not write any tip information to Win-EZ Manager Reporting (only for Win-EZ POS)

Auto Clear Batch

This feature is not intended for tipped (restaurant) environments.
THIS FEATURE DOES NOT CLOSE THE BATCH, IT ONLY CLEARS THE BATCH RECORDS FROM Win-EZ Payment Server, AND SHOULD ONLY BE TURNED ON IF THE MERCHANT SERVICE PROVIDER IS SET TO CLOSE THE BATCH. ENABLING THIS FEATURE WHEN IT SHOULD NOT BE ON WILL RESULT IN THE UNRECOVERABLE LOSS OF FUNDS.

Path to mirror folder:

This setting allows Win-EZ Payment Server to write a duplicate batch file to a second location (usually on a second hard drive), so that the file can be recovered in the event of a loss of the primary hard drive.

Accepted Cards

This collection of check boxes allows you to select which card types that Win-EZ Credit Card will accept.

1.7.3 Transactions

1.7.3.1 Manual Transaction

What do we do here?
Win-EZ Credit Card is designed to take transactions from Win-EZ POS and process them. But it can also perform Sale and Credit transactions by hand. This screen is used for entering the customer's card information and submitting it for Authorization.

Regular Sale Option
Select this option for processing a regular sale.

Authorization Only Option
By selecting this option, the transaction will be submitted for authorization, but will not be added to the batch. At settlement time, funds will not be captured. This is for obtaining authorization on an amount, and then using the Authorization number on a subsequent **Capture Sale**

Credit Transaction Option
If this transaction is a Credit to the customer's account (removing money from the merchant account and returning it to the Card holder's account), then check this box.

Capture Sale Option
By selecting this option, a transaction that was already approved by using the **Authorization Only** may be added to the batch. This will also make it possible (and mandatory) to enter a Sequence Number in the field below.

Void Option
Select this option to void the transaction. This will permanently remove the transaction from the batch.
If a transaction is accidental removed, it can be found in the Type Report.

Change Tip Option
Selecting this option will change the tip amount for the transaction to the amount entered in the **Tip Amount box**.

Voice Auth: Option
By selecting this option, the transaction will be submitted for authorization, but instead of requesting an authorization from the bank, it will use the authorization supplied when the transaction was called into the bank for a Voice Authorization.

Activate Gift Card Option
Selecting this option will allow a new Gift Card to be activated (Issued).

Reload Gift Card Option
Selecting this option will add the amount in the **Sale Amount** field to the gift card.

Gift Card Balance Option
Selecting this option will retrieve the available balance for the Gift Card .

Room Charge Option
Selecting this option will process the transaction as a room charge.

A combination of the following fields may be required for a transaction:

Account
This field should contain the Credit Card Account number.

Expiration Date

Place the expiration date of the Credit Card in this field. For example, if the card expires on **6/09** you would enter **609**. If it expires on 12 of the year 2006, you would enter **1206**.

Sale Amount
This is where you will place the amount of the sale. If this transaction is to be a **Credit** then the credit amount goes here.

Gratuity Amount
If a gratuity was paid, enter that amount here. This amount will be added to the Sale amount, and submitted as the amount to authorize.

Server ID
Enter a Server ID number. Entering it here will assure that your Server reports track the Media information correctly.

Check ID
Enter a Check ID number. Entering it here will assure that your Sales reports track the Media information correctly.

Seq. Number
This is where you should place the Sequence that was obtained from authorizing the transaction beforehand.

Auth. Number
This is where you should place the Authorization number that was obtained from the call center, or a prior transaction.

Exclude Transaction from sales.
Selecting this option will exclude the transaction from the Win-EZ Manager Sales reports (WIN-EZ POS only). This is generally used for refunds, or for deposits.

Override Duplicate Sale.
Some platforms will decline a duplicate card / amount combination in the current batch. Use this option to override the dupe flag for this transaction.

Submit Button
When all of the above information is entered correctly, clicking this button will process the transaction and add it to the batch if there are no problems. Any error messages will be displayed. And a Sales Draft will appear in the Report viewer at this time.

1.7.3.2 Get Transaction Information

This function allows you to retrieve the information for a single card in the current batch.

1.7.4 Batch

What is a Batch?
A Batch refers to a group of transactions that are collected throughout a business day. As transactions are processed, they are assigned a sequence number for referencing later, and stored in the currently open Batch. All transactions in the batch (including declines and voids) are stored and assigned a sequence number. Some of these transactions may not appear on all reports, so sequence numbers may seem to skip.

Where is it Stored?
Primarily, the batch is stored on the Hard disk of the computer that is running Win-EZ Credit Card. If the batch file becomes corrupt, the transactions may need to be repaired or reentered by hand.

1.7.4.1 View Batch Detail

This option allows you to see the raw information related to the batch. This is generally used by support staff, and contains no sensitive batch information

1.7.4.2 Close Batch

What goes on here?
This selection starts the process of sending the transactions to the bank. depending on the network several option boxes may appear.
Once the batch is submitted a message box will display with the status.

1.7.4.3 Clear Batch

The Clear batch feature is not normally used, and will display several warning messages before running.

This feature is only used if an error in the batch requires that the Batch be closed from the ePay Administrator. After the batch has been closed in ePay Administrator, this feature can be used to clear the batch within Win-EZ Credit Card.

If the batch is cleared without first being submitted from within NETePay, then the batch will be lost, and no transactions will be submitted to the bank.

1.7.4.4 Offline Mode

Offline mode is a test feature at this point and should not be used

1.7.4.5 Increment Batch Number

Some networks (TSys / Vital in particular) require a unique batch number per batch. In some circumstances the batch will successfully close, but the batch number will not increment properly. Batch numbering can be lost if the computer is replaced as well. In these circumstances this feature can be used to increment the batch number.

Note that this does not apply to NETePay platforms. There is a similar feature in ePay Admin to increment the NETePay batch.

1.7.5 Users

PCI Compliance is a large part of credit card processing, and users are a key issue in this compliance.

The PCI Standard requires that access to all systems in the payment processing environment be protected through the use of unique users and complex passwords. Unique user accounts indicate that every account used is associated with an individual user with no use of generic group accounts used by more than one user. This means that every person that has access to Win-EZ Credit Card Interface must have their own user account.

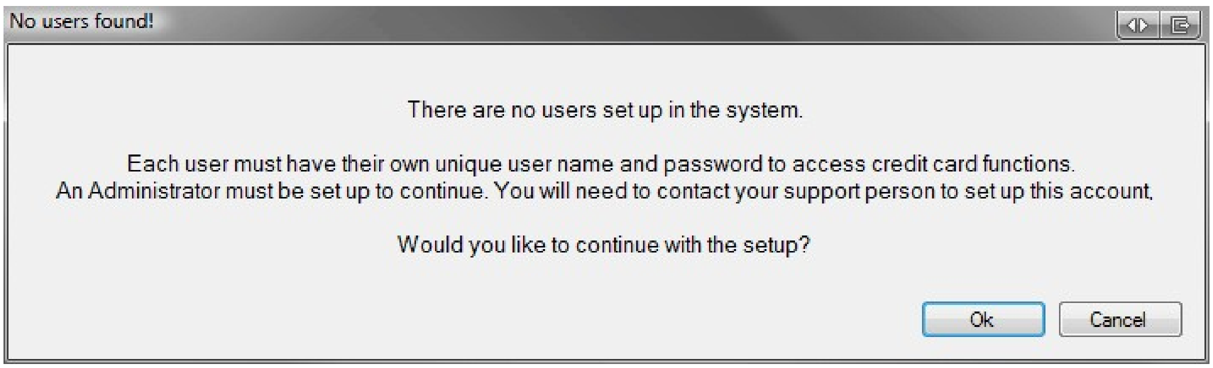
The PCI Standard also requires the use of "strong" passwords, and a strategy for password complexity for compliance. This means that passwords must consist of at least 8 characters, must have at least one lower case letter, one upper case letter, one number, and one non alpha numeric character. Passwords must also be changed every 90 days, and must and the password cannot be the same as the last 4 passwords used.

PCI user account requirements beyond uniqueness and password complexity also include:
- Automatic lockout of accounts that provide the wrong password 6 times.
- Automatic lockout of accounts that are inactive for more than 90 days
- Automatic time out of the application is idle for 15 minutes or more
- Logging of all access to the payment application including date and time, the user account accessing the application, and detailed information about the actions taken by that user.

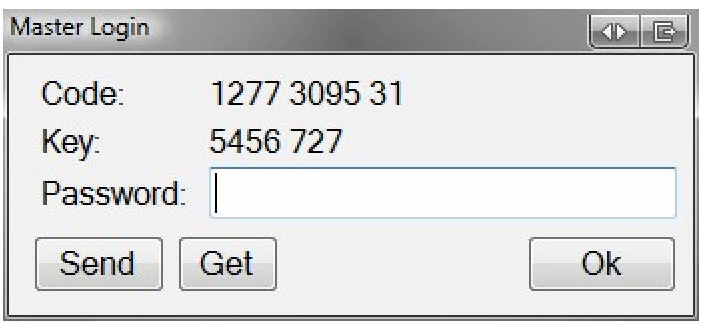
1.7.5.1 First Time Startup

Due to the unique nature of the PCI user requirements, an Administrator account must be setup before the system can be accessed. To protect the system from unauthorized access, or tampering with the access system, the creation of the first Administrator account must be done by a Master Account. The Master Account is a special account that only has access to User Accounts, and has to be authorized by a Win-EZ Support staff member. You must contact your support staff to log this account in so that an Administrator account can be created.

When Win-EZ Credit Card interface is launched the fist time the following screen will appear:



Select ok, and the Master Login screen will appear. At this point you should contact your Win-EZ Support staff member.



This screen produces unique Code and Key numbers that can be exchanged for a password. These numbers are only good for this particular time that the screen is displayed, so make sure that you don't close this window unless you want to start the entire process over.

The key exchange can be achieved by using the Send button, and telling your support staff the key number that appears on the confirmation screen, or by telling the support staff the Code and Key numbers listed on the screen.

Once the support staff member gets the Code and Key, they will instruct you to use the Get button to retrieve the exchange file, or will tell you the password to type into the Password field. Once the password is entered, and the Ok button selected, the Master Account will be logged in, and used to automatically create the first Administrator Account.

The first step is to create a password for the account. The PCI Standard requires that all users be created with an automatically assigned password, and that they must change this password the first time that they log in.
The following screen is used to generate a random password for the new Administrator Account. You can select the Generate Password button if you do not want to use the password that has been generated for you. Once you have written the password down, or copied it to the Windows Clipboard (CTL +C, or right click > Copy) then you can select the "I have copied this password ....." check box, and select the use password button.

The User Editor screen will appear so that you can fill in the user information for the Administrator Account.

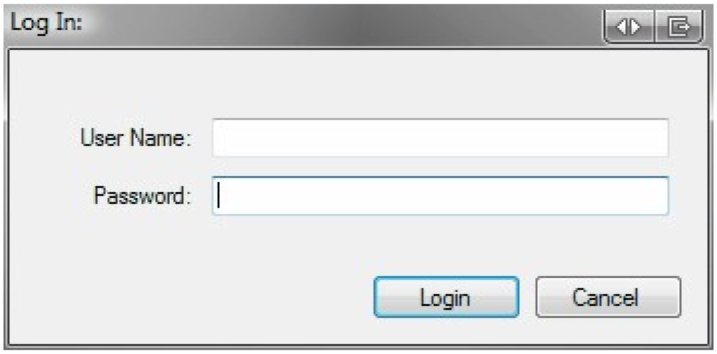
You must enter the full name for the Administrator: Remember that you cannot have generic accounts, so this should be an account for a person. Generally it is recommended that this first account be for the support staff, or installer that is responsible for supporting the Win-EZ Payment Server application.

The User Group should be left at Administator

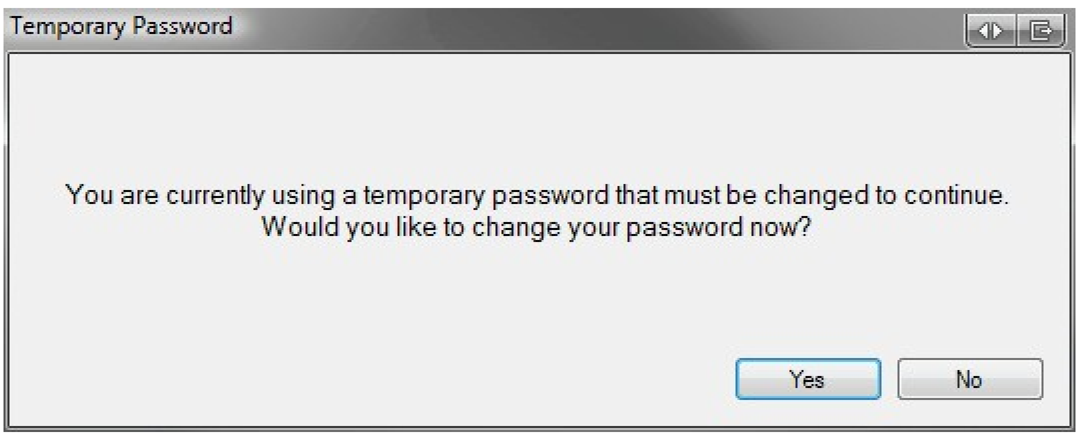
A user name must be assigned; This is the user name that will be used to log into the Win-EZ Credit Card Interface each time that the program is started.

The Password fields are already filled in with the automatically created password.

Once the required User Name and Full Name fields have been filled in, select the save button, and the Master Account will be logged out of the system, and the new Administrator Account that was just created will be presented with the log in screen.



Enter the User Name and Password created in the last step, and select Login. You will be presented with the following message explaining that you are using a temporary password, and that you must change it. Selecting No at this point will exit the program, and you will be prompted with the same screen the next time that you log in.



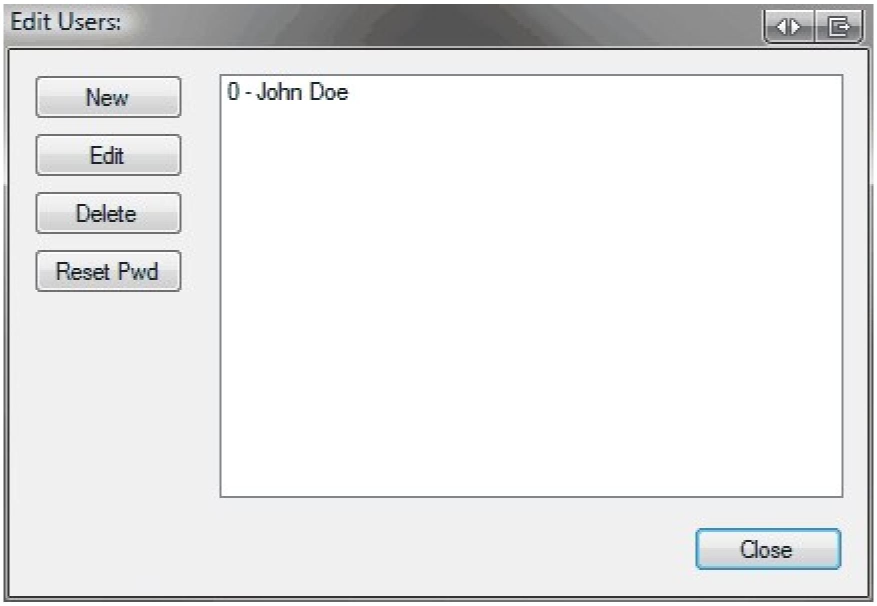
Select Yes, and you will be taken to the following screen so that you can select a new password.

The colored bar next to the Password entry field will change from red to green based on the strength of your password.
There are 5 red x icons with explanations of the password requirements. You must meet 4 of these 5 requirements in order to save the new password.

Select save, and the new Administrator Account will be logged into the system.

1.7.5.2 Edit Users

Selecting this option from the menu will take you to the User Management screen (If allowed by your User Group).



From this screen you can add new users, edit existing users, delete existing users, and reset a users password. Of course all of these features are controlled by the level of access that you have been assigned based on the user group you belong to. Note that only admin users are allowed to edit their own accounts, or those of other admin users.

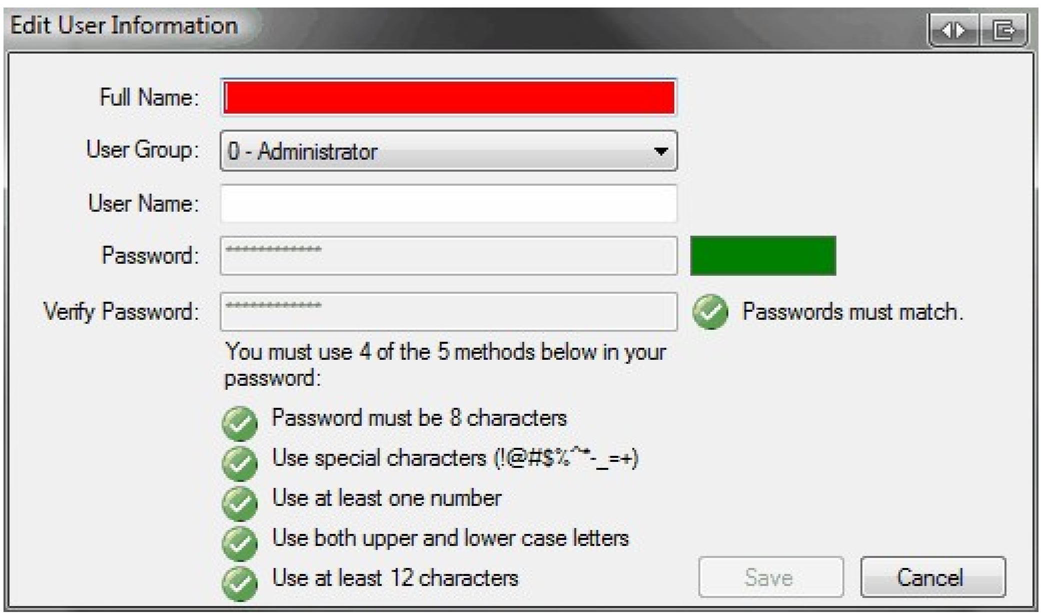
You can't change your own password from this screen, but should use the Change Password menu item to do this.

1.7.5.2.1 New User

Selecting the "New" button will display the new user screen.

The PCI Standard requires that all users be created with an automatically assigned password, and that they must change this password the first time that they log in.
The following screen is used to generate a random password for the new User Account. You can select the Generate Password button if you do not want to use the password that has been generated for you. Once you have written the password down then you can select the "I have copied this password ....." check box, and select the use password button.

The User Editor screen will appear so that you can fill in the user information for the User Account.



You must enter the full name for the User: Remember that you cannot have generic accounts, so this should be an account for a person.

The User Group should be set to the appropriate group based on the level of access that you want this user to have

A user name must be assigned; This is the user name that will be used to log into the Win-EZ Credit Card Interface each time that the program is started.

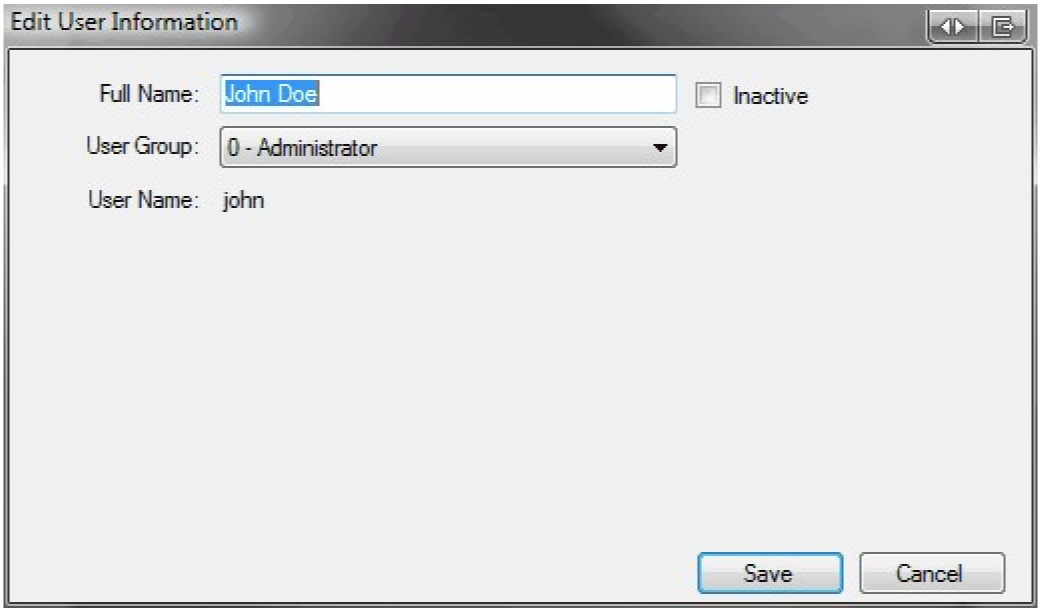
The Password fields are already filled in with the automatically created password.

The next time that the user logs in they will be required to change their password.

1.7.5.2.2 Edit User

Selecting the "Edit" button will display the edit user screen.

From this screen you can:



Set a user as active or inactive.
Change the users name.
Change the Group that the user belongs to.

Note that you cannot change a password for a user here.
If a user wants to change a password, and they know their password, they should log into the system, and use the "change password" menu option.
If a user has forgotten their password, an Administrator can use the Reset Password feature to reset the user's password.

1.7.5.2.3 Delete User

Selecting the "Delete" button will prompt you to acknowledge that you want to delete the user.
Selecting Ok will permanently delete the user from the system.

1.7.5.2.4 Reset Password

Selecting the "Reset Pwd" button will present an acknowledgment window, and then the random password generator screen.

You can select the Generate Password button if you do not want to use the password that has been generated for you.
Once you have written the password down then you can select the "I have copied this password ....." check box, and select the use password button.

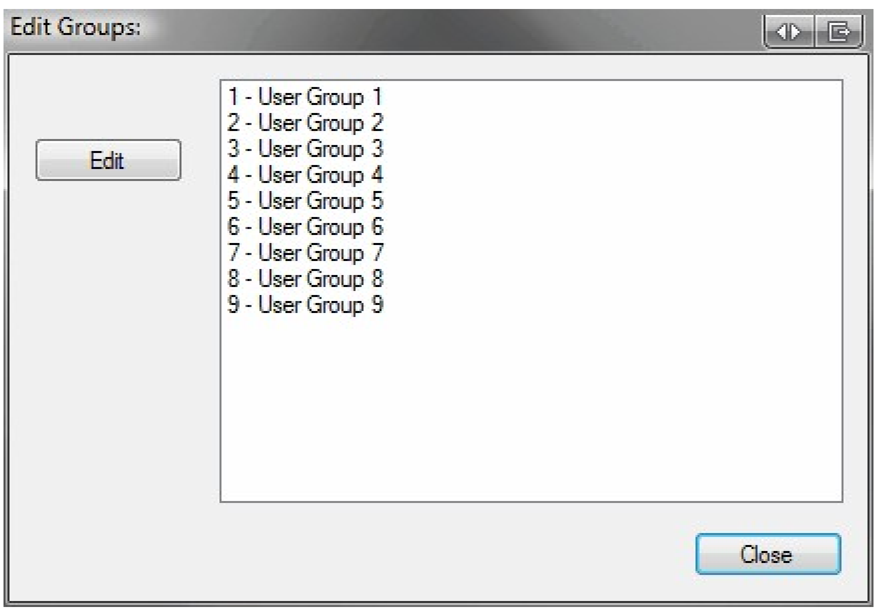
The next time that the user logs in they will be prompted to change their password.

1.7.5.3 Edit Groups

User Groups are the security groups that each user is attached to in order to restrict access to sensitive cardholder data, or settings.

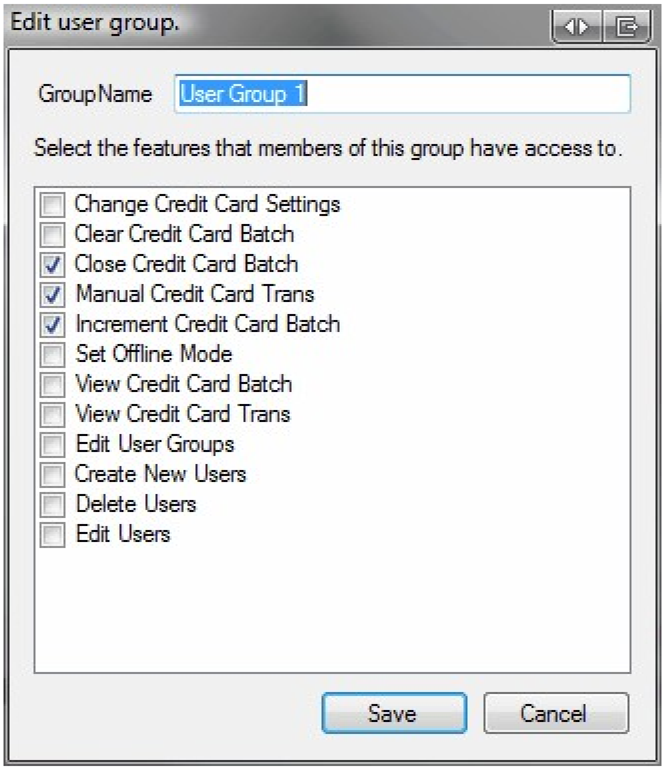
Each non admin user should be given only enough power to do the jobs that they need to do.

Selecting the Edit Groups menu option will present the Group Editing screen:



Select a group from the right list, and double click, or select the Edit button.

Note that you cannot edit the Admin Group.



From this screen you can set a name for the user group, and select the options that you want this group to have access to.

It's important to note that each group further down the list will only have access to the features that the group above it has. So Group 3 will not have any features that Group 2 is not allowed to have. This means that you should build groups from the top down with Group 1 having the most features available, and Group 9 having the least.

1.7.5.4 Change Password

Selecting the Change Password menu option will present you with the following window:

The colored bar next to the Password entry field will change from red to green based on the strength of your password.
There are 5 red x icons with explanations of the password requirements. You must meet 4 of these 5 requirements in order to save the new password.

Select save, and the new Administrator Account will be logged into the system.

1.7.5.5 Log Out

Selecting the Log Out menu item will log the current user out of the system, and display the log in screen.

The current user will also be logged out after 15 minutes of idle time.

1.7.5.6 View Audit Logs

Audit Logs contain every event that occurs while a user is logged into Win-EZ Credit Card interface. These logs are required by the PCI Standard.

Selecting the View Audit Logs menu item will allow you to select the dates that you want to see, and present the logs in a grid for viewing.

1.7.6 Tools

The tools menu contains additional helper menu items.

Stop Payment Server: This menu item allows Win-EZ Payment server to be stopped.

Start Payment Server: This menu item allows Win-EZ Payment server to be started.

Restart Payment Server: This menu item allows Win-EZ Payment server to be restarted.

The current running status of Win-EZ Payment Server will be displayed in the Title **B**ar at the top of Win-EZ Credit Card Interface.

1.7.7 Help

The help menu allows you to view help and information about Win-EZ Credit Card Interface, and Win-EZ Payment Server.

About Menu: Shows the splash screen that displays information about the program name and versions.

Table of Contents: Displays this file

PA-DSS Guide: Displays a PDF of the current version of the PA-DSS Implementation Guide. This guide is a critical tool for securing your Credit Card Processing Environment, and helping you to achieve PCI Compliance.

1.7.8 Reports

All reporting for Win-EZ Payment Server is done in either Win-EZ Manager, or your POS backend.

1.8 Reward Blaster

Reward Blaster is an Automated Email Marketing and Loyalty Reward program that can be used in conjunction with the Win-EZ POS System.

For more information on licensing Reward Blaster contact your Win-EZ POS Distributor.

1.8.1 Surveys

From this tab you can view all of the surveys that member have taken.

Month Selection- The drop down box in the lower left of the screen contains a list of months that contain surveys. Select a month to view all of the completed surveys for that month.
Surveys can be created in the settings tab. Each survey contains 5 questions in 4 main categories: Food, Service, Value and Experience. The top bar shows the grand total of scores for all returned surveys this month. Below the average bar is a list of each survey and its corresponding account information. The box on the left lists all vital information of that the account member, while the box on the right shows individual section scores, check amount, server name, and pros and cons of the

last visit. On the right side of the box are 2 very important buttons, reply and detail. Their functions are as follows:

Reply: Selecting this button will display a new window that will allow you to create an email in response to the survey.

Detail: Selecting this button will expand the line to display the full detail of the survey.

1.8.2 Promos

This is a list of your Rewards

The column on the left contains all of the active promos in the database. Because of the large amount of pre-built promos, it is recommended that you review the database and make any promos you are not going to use “Inactive”. This will shorten the list, and make it more manageable.

The panel on the right side of the screen contains settings that pertain to the promo selected in the left list.

Promo Name: What you would like to call the promo.
Promo Type: This drop down box allows you to choose what kind of promo you want. Depending upon the type of promo selected, required entry fields may change.

The following is a list of promo types that exist in the system;
- **Recurring Points Promo** - This is the promo that will be sent out when a member reaches the point value that is entered in the “Points to Earn” field (There can only be one recurring point promo).
- **Referred Friend Promo** - This is the promo that will be sent out to a friend that has been referred by one of your members and has signed up for the program.
- **Referring Friend Promo** - This is the promo that will be sent out to the member that referred the newly signed up friend.
- **In Store Sign Up Promo** - This is the promo that will be sent out for a new member that signs up in the store.
- **Web Sign Up Promo** - This is the promo that will be sent out for a new member that signs up on the Reward Blaster signup portal.
- **Birthday Promo** - This is the promo that will be sent out on the any birthday months on the 28th of the previous month. This promo is used for members that are checked to use an adult birthday promo.
- **Child’s Birthday Promo** - This is the promo that will be sent out on the any birthday months on the 28th of the previous month. This promo is used for members that are checked to use a Child’s birthday promo.
- **Anniversary Promo** - This is the promo that will be sent out on the any Anniversary months on the 28th of the previous month. This promo is used for members that have a valid anniversary month in their account.
- **Lost Customer Promo (30 Days-180 Days)** - This promo that will be sent out to any members that have not placed an order in the appropriate number of days. There are a total of six lost customer promos, you may use one or all. They should start out with a modest offer and get more aggressive as time goes by.
- **Life Time Points Promo (1-10)** - Reward Blaster has a rewards program within a rewards program. There is the normal recurring points rewards but there is also a life time rewards program to reward your most loyal and profitable customers. Set these at a progressively higher point range and give valuable rewards to a select few of your best members.
- **Calendar Promo** - This is the promo that will be sent out on the 28th of the prior month that is

select in the promo calendar drop down menu. Example: Set a Valentines promo to February and it will be sent on the 28th of January.

- **Message Blast** -This is not a promo but a way to blast your customers on the fly with either an email or text message (Coupon Club). Note that the "Send Blast" button only appears when the promo type is set to Message Blast or Promo Blast below.
- **Promo Blast** - This is a promo that you can blast to your customers on the fly with either an email or text message (Coupon Club). Note that the "Send Blast" button only appears when the promo type is set to Promo Blast or Message Blast above.
- **First Visit After Referral** - This is the promo that will be sent out to new referred friends after their first visit. Use this promo in conjunction with the Referred Friend Promo above. You may either one or both depending on how you want to reward newly referred friends.
- **Survey Award Promo** - When a customer fills in the online survey and select submit this promo will be sent out to them during the next daily promo cycle.

Report Group: This dropdown allows you to select your reporting group for the promo for reporting purposes (these groups can be changed on the settings tab) .
Email Subject: This is what will appear in the subject line of your promo email. It is very important to not use ALL CAPS or other keyboard characters like (!@#$%^&*). If you use these you will get marked as "Junk" or worse get marked as "Spam"
Days Until Expires: This will default to 30 days for all new promos. You may set it to however many days you wish. Do not forget to enter the expiration date in the disclaimer field in the main body of the email below.
Point Function: This will default to Normal for all new promos. You may set it to issue points upon use so a member can redeem a promo, get a discount and get a certain number of free points as well. the options are "Double Points", "Triple Points", "Quadruple Points" or you add a set number point to that members file when the promo is redeemed.
PLU To Order: Allows you to choose the PLU (From the product database) for your promo. When a promo is given it will ring up this PLU to apply the correct discount to the check. The PLU must then be built in the product database. Once the item exists edit the item and select the "Advanced" button on the top right hand side. Within advanced settings there is an "RB-Promos" tab this is where you set up the PLU promo for the Win-EZ POS System (See help under PLU advanced for more information).
Points to Earn: This field will only show up on "recurring points" promos and "lifetime points" promos. Enter in the number of points required to receive this promo. One point is awarded for every dollar spent. If you want your members to spend $200.00 before receiving a promo, enter 200 in the points to earn field.
Calendar Month Drop Down Menu: This is only appear when the promo type is set to Calendar. Select the month that each individual calendar promo is good for I.E. Valentines=February, Halloween=October.

Send Blast: This button will call up a list of send options for firing out your email or text message blast. (See help on the Blasts window for more information.)
Send Test: This button allows you test and make sure your promos are exactly how you want them. It will allow you to send anything regardless of the promo type to any account that is checked as a test account (within the account editing screen).

Note that both the Send Blast, and Send Test button send the type of message that is selected from the section below (Graphic Email, Text Email, or Text Message).

Below the settings area are 3 editing tabs. Each tab is outlined below

Image Email: This allows editing of any email that is sent as an image.
Set Banner: Pulls up a list of preloaded banner art for a custom promo. You may use your own

custom artwork if you wish. The file format is a .PNG file and is 384 pixels wide. Depending on how high you make it you can hide all other settings on you custom promo and just use your own artwork as the display. Put the file in the following folder:
(C:\win-ez\win-ez\WorkingSettings\Applications\Reward\Graphics\Custom Graphics)
Set Header: Allows you to edit your promo headline
Set Body: Allows you to customize the body text of the promo.
Set Footer: Allows customization of closing statement.
Set Disclaimer: This field allow you to set the promo's parameters.

Editing Promo Text: Please note that on all of the text entry boxes you may select the font, size and color. You may also use the "ENTER" key to put in a carriage return that will allow multiple lines of text. The image email will automatically lengthen and resize to the appropriate length depending on how much text is entered.

You can select the color for the background of the text portion of the promo, and the border on the banner. There are two ways to set the color.
The Pick Button: Selecting this button will display a color picker so that you can select from a standard palette of colors.
The Color Picker:  This control is used by clicking the left mouse button while the mouse is over the image. While holding the mouse button down you can drag the color picker over an image or section of the screen that you would like to use for the background color. The currently selected color (along with a zoomed image of the area under the mouse) will display in the pop up window. Once you have positioned the mouse where you want it, just let go of the left mouse button, and the color you have selected will be used it the image.

Copy Text Down: Allows for your promo to be condensed into text only. THIS IS VERY IMPORTANT FOR "CAN/SPAM" RULES. YOU MUST HAVE A TEXT ONLY OPTION NOT TO GET FLAGGED AS SPAM BY YOUR MEMBER EMAIL PROVIDERS.

Text Promo:
The Text Promo tab allows you to format a text only (no picture) version of a promo, or blast message.

Text Message:
The Text Message tab is used to configure the body of the text message to be sent. The footer and header messages can be configured from the Settings tab.

1.8.2.1 Blasts

This window produces a list of Reward Blaster members. You may uncheck any member you do not wish to send a blast to or use the blast filtering located to the right of the member list. The filters can be used in conjunction with each other for very advanced filtering. Read the definitions below and see an example of an advanced filter at the bottom of this page.

Blast Filtering:

Include Seasonal Members: If you are using seasonal members this will allow you to include them in your email or text message coupon club blast. This will auto default to unchecked which will exclude seasonal members from the list.

Last Order Filtering Criteria: If you check the Last Order filter you can select the number of days that members HAVE or HAVE NOT placed their last order.

Points Filtering Criteria: This will let you further filter the list by available points, used points or lifetime points. You may then select "greater than", "less than", "equal to" etc. Then select the number of points that you wish filter against.

Interest Groups: Interest group names are entered in the settings tab and accounts can be designated to belong to one or more interest groups. By selecting an interest group here you will filter you member list down to only those members that belong to that interest group.

Challenge A: Restaurant A wants to send a coupon club blast to the "Football Fans" interest group.
Solution: Go to interest groups and check "Football Fans" .

Challenge B: Restaurant B wants to send a coupon club blast to the "Football Fans" interest group that "HAVE" ordered something in the last 30 days. (Those are going to be more engaged and loyal customers.)
Solution: Go to interest groups and check "Football Fans" then check Points and select "HAVE" from the drop down box and enter 30 in the Days field.

Challenge C: Restaurant C wants to send a coupon club blast to the "Football Fans" interest group that "HAVE" ordered something in the last 30 days. (Those are going to be more engaged and loyal customers.)
They also want to target just members that meet the above criteria but also are very close to reaching their point reward of one hundred points. They decide they only want member with more than seventy five points.
Solution: Go to interest groups and check "Football Fans" then check Last Order field and select "HAVE" from the drop down box and enter 30 in the Days field. Now they are ready to check the Points field and select "Available Points" from the drop down box then select "Greater Than" (>) and enter 75 in the points numeric field.

1.8.3 Accounts

The column on the left contains all of the Enabled Accounts in the database. Whenever you create a new account it will be stored in this field.

Across the top of the list are two filter rows, that contain drop downs for filtering the account list.
Filter Enabled Accounts: The accounts field can be filter to include or exclude Enabled, User Disabled, Disabled: User Unsubscribed, Disabled: Email Bounce or All accounts.
Filter Active Accounts: The accounts field can also be filtered by active status, the choices are All, Active This Month or Inactive This Month. This setting us generally used for Seasonal accounts.

You can also sort the account list by clicking on the title row in any column.

There is an "Add" Button at the bottom left of the page. This is used to add a new account to the system.

The panel on the right side of the screen contains settings that pertain to the account selected in the left list.

Master Account Info: This box contains all of the main information about an account, and can be edited at any time. POS Entry-Accounts that are created from Win-EZ POS front of the house will all have the default name of "Valued Customer" and the family member will have the default name of

“Family Member”. This is to save time when entering new accounts.

Active Months: These can be set from the front of the house on new member signup or on this tab. Active months are used for seasonal members that you do not want to bother with email or coupon club text messages while they are away.

Account Stats: This provides all of the pertinent data accrued for this member.
Phone Numbers: Every account can up to four phone numbers and each one can chosen to receive coupon club texting. When a new account is created from the floor the main phone number is the one that will be checked if coupon club text messaging is selected.

No Surveys: If selected the member will be excluded from surveys. This feature is designed for the VERY frequent customer that might end up getting a survey per week because he or she eats or drinks there every day.
Send Promos As Text Messages: Some customers will not want any email promo but will instead want all promos sent via text messaging, in addition to belonging to the text message coupon club. Note that there will be a cost per text message to use this feature.
Home Store: For multiple store accounts this field will contain which store the account was created in.
Forward To: This is used in the case of two people wanting to consolidate the accounts into one. Simply forward one account to another.
Family Members: Each account can have up to five family members. Each family member can receive either an adult or a child’s birthday promo.
Interest Groups: Select one or more interest group that this member wants to belong to. I.E. A member may want email or coupon club messages sent to them for early bird specials but not late night bar drinking contests. The Interest Groups can be defined on the Settings Tab

1.8.4 Point Journal

The Point Journal provide a location to view each Point related entry into the database for each month.

Select the month from the bottom right of the left column.

The panel on the right will display the detailed information about the item selected in the left grid.

Check back as this feature will get much more functionality in future releases.

1.8.5 Promo Journal

The Promo Journal provide a location to view each Promo related entry into the database for each month.

Select the month from the bottom right of the left column.

The panel on the right will display the detailed information about the item selected in the left grid.

Check back as this feature will get much more functionality in future releases.

1.8.6 SettingsTab

Hide account names: This allows servers to only search for accounts by phone number on the Point of Sale terminal. Since 99% of your accounts are going to default to "Valued Customer" leave this setting in its default checked state.

Double Points Days: By ticking the box next to the corresponding day, you are able to enable double points for the selected day. You can choose all day or select specific times for this feature to take effect.
Example: If you would only like double points between 4 and 6PM on Tuesday, tick the box next to Tuesday and set your start time to 4PM and your end time to 6PM. Your members will receive double points when spending money during that time.

Promo Reporting Groups: Reporting groups are used to group each type of promo for reporting. Every promo should have a reporting group attached to it so that you can see what types of promos are being used more than others. To add a new report group, scroll to the bottom of the box and click on the blank line. A pen will appear signifying that you can now edit the field (type right in the box) with your own group title.

Survey Settings: Will allow you to set up your surveys.

Send Survey After Initial Visit: If this box is ticked, It will send out a survey to every new member upon sign up.

Send Survey Every #__ Checks: Fill in the drop box. How many visits would you like for each member in between surveys?

Survey Questions: This section allows for up to 5 questions under each of your 4 main categories: F & B, Service, Value and Experience. To add a question, simply click in the corresponding box (under the correct category) and type.

Store Website: Your company website. This will appear on all email correspondence that is sent to accounts.

Reply to Email: The email address that you would like any responses to go to. This should be set to a generic store email address, or to an owner or general managers email.

Email From Name: A friendly, recognizable name for your emails

Text message footer: Closing line of your text messages

Store name: Your store name, used in emails to identify your location.

Store phone #: Your phone #

Email Footer: Closing line of your email

Email Company Info: Restaurant name and location, used in the footer section of emails.

Promo Company Settings:
Set Logo: Allows for upload of your corporate logo to be used in emails.
Set Name: Enter your company's name here. This will be embedded in promo graphics
Set info: Address and phone# to be emededded in promo graphics.

Survey Mail Subject: What will show up in the survey subject line
Survey Custom Message: Do you want a small note to accompany the survey? Enter it here.
Expiration Email Subject: What will show up in the subject line of your expiration date emails
Expiration Custom Message: Custom message telling members that their promos have expired and are no longer valid
Referred Friend Email Subject: What will show up in the subject line if someone is referred by another member
Referred Friend Email Message: Let someone know they were referred and this is not spam!
Interest Groups: This is where you set up interests for you accounts. Once you set them up here they will be visible on each account (as tick boxes) and after you press the blast button (as filters). This section works just like
Reporting groups in that you click on any line in the box to edit your text.
Sync with Web: Allows for manual updating if auto update fails. Syncs new customers from other stores, downloads graphics, and uploads blaster stats. This is automatically done every time a blast is sent and at new day begin.

1.9 Credits

Some icons provided by http://www.visualpharm.com, and http://p.yusukekamiyamane.com/

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Endnotes 2... (after index)

Contact your local dealer at

____

For support