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Win-EZ Manual Version POS 8.24, Manager 2.26

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Printed: May 2007 in Sarasota, Florida

Publisher

Hospitality Data Systems, Inc.

Managing Editor

Tina Melendez

Technical Editors

Micheal Horne
Randy Cartlidge

Cover Designer

Randy Cartlidge

Team Coordinator

Tina Melendez

Production

Randy Cartlidge
Micheal Horne
Robert Lee
Tina Melendez
Dave Monteith
James Hanratty

Special thanks to:

All the Win-EZ clients and dealers who have made this product such a hugh success.

We Thank You.

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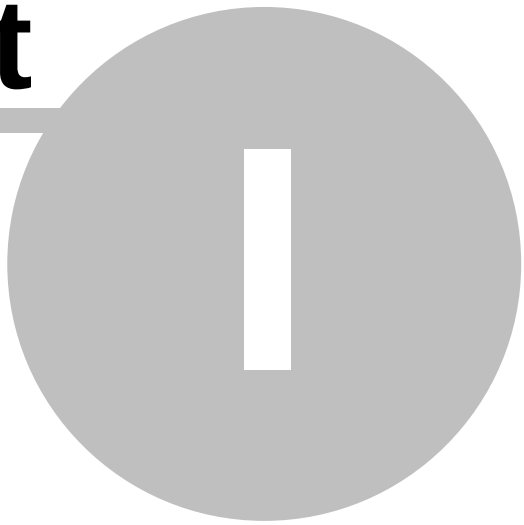
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Part



1 Win-EZ POS Functions

This section contains the basics of system navigation. Any new system requires time spent learning the in and outs of how to maneuver thru the different screens. This will make using the system much easier if a little time is spent in the beginning learning "Fast Keys", short cuts and the fastest easiest way to get transactions placed.

1.1 Getting Around Main Screen

This is the starting point for all staff. The main page is used to clock in, start a new check, start a bar tab and many other functions



1.2 Common Navigation Buttons

There will be certain buttons that are on many screens throughout Win-EZ.

Here is a brief descriptions of the more commonly used buttons.

"OKAY"

This button is to finish the question asked.

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"CANCEL"
This is to cancel the function, or screen that is being used.



"PRINT"
This button is used to print the information on the screen.





"CHECK with a Function"
These buttons address a specific check, and does the function listed.







"KEYPAD"
Some screens ask for a certain number to be enter, such as "How many guests", but there are limited set buttons. The "Keypad" allows for a higher number to set buttons.



"EXIT"
This will exit from the current screen back to the "Start" Page.



"ARROWS"
These buttons will move forward or backward with the function that is being performed.
Arrows with the 2 lines toward the point means "Jump to End" or Jump to Beginning" of the list



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"?"
Pressing the "?" button then a function will give an explanation of that function.



"R"
While in an open check, pressing the "R" button, then a menu item will show any recipes that have been entered into the database for that item.

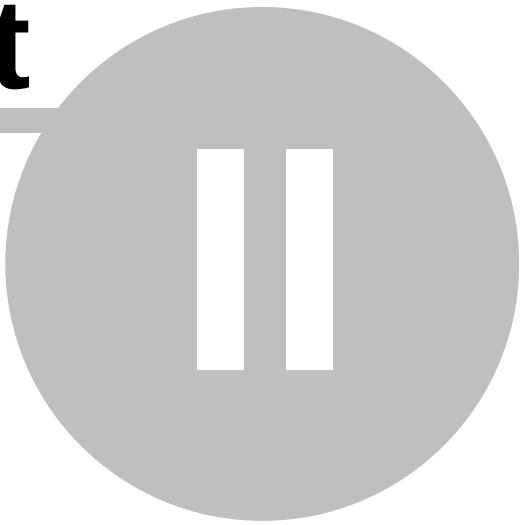


"SORT"
These buttons sort an employees check listing by Check, Table, Server, Name or Order Type.



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Part



2 Time Clock

This section contains how to clock in and out using the Win-EZ POS System. The front of the house pos will track all time punches and calculate overtime for employees. When an employee is clocked in they may begin using the system to order items and perform other POS functions.

2.1 Clocking in

Servers cannot place orders in Win-EZ until they have clocked in. When you clock in the system starts a sales journal. This is also used for payroll purposes for all staff members.

At the Start Page
Enter your number on the keypad or slide your magnetic card.



Touch the *Time* button.

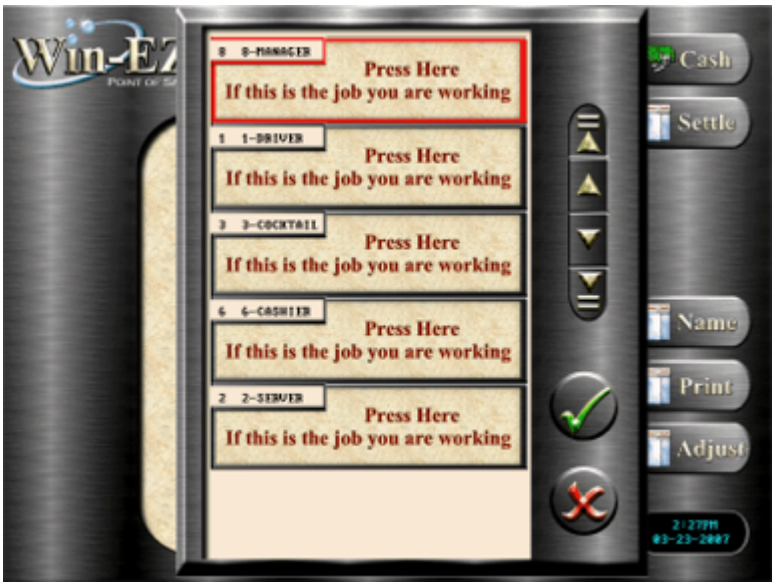


A window will appear that asks, "Do you wish to clock in".

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When box appears, choose which job that will be performed that shift (if more one job appears),
When RED box appears around the job, Press Okay.



READ the e-mail sent by the manager then touch the "X" to leave this screen or Print the e-mail.

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Note: **When a "Clock in" Receipt it produced, you are clocked in.**

2.2 Clocking Out

To Clock Out, use the same procedure as Clock in.

At the Start Page
Enter your number on the keypad or slide your magnetic card.



Touch the *Time* button

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One of two windows will appear, depending on the set up choice.

First is with options to view "This week" accumulated time, "Last Week" Accumulated time, Okay or Cancel.



"This Week" and "Last Week" will print a receipt with Accumulated time, not including the current shift.

To finish Clocking out, press Okay.

The second possible screen is without the option for Accumulated time.



For tipped employees, the "Enter Cash Tips" window will appear.

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Once the cash tips are entered, a receipt will print.

Read any e-mail sent by the manager.



2.3 E-Mail

E-Mail is a function the management creates for each job code, employee or global all job codes. This information is important to each job's duties.

There are two ways to retrieve E-mail from Managers.

At Clock in/ Clock out. The message will appear.

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Print the message or cancel AFTER the message is read.

On "Other" Page

From the Start Screen



Press "Other"



The Left side of the "Other" page is e-mail information.

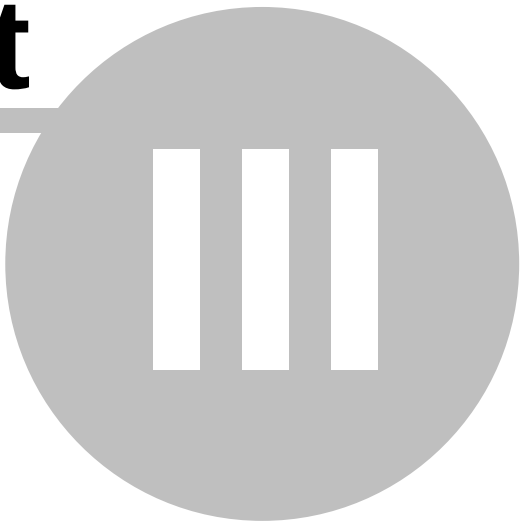
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NOTE: If forced e-mail is turned on, you will be forced to read your e-mail each time you clock in and out. If it is turned off , e-mail will only be received when a new e-mail is sent.

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Part



3 Table Service

This section contains the basics of how to place an order and send it to the kitchen and bar. This will help with the order cycle of starting a new order or table, selecting the appropriate number of covers, adding items to the check, presenting a guest check to the customer and recalling an existing order.

3.1 New Order

Enter the employee number or swipe the employee card.

Touch "New Check"



Choose which table to open.

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While most restaurants use a floor plan, Win-EZ has the ability to open a check with a numbered keypad, as shown below.



Enter number of Guests at the table

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From this point, order the items needed.

REMEMBER: If "Table Lock" is on, only one check can be opened at a time on that table number.

3.2 Ordering Items

Once a new order has been started, choose items to order. This screen contains the **Major Menus** on the left side of the screen and are divided by different shifts such as *Lunch, Dinner, Pizza and Bar.*

Menus Pages are divided by groups of like items such as Appetizers, Sandwiches, And Beverages.

To order an item: The following section is an example from the **Major Group** of Lunch and the **Menu Page** of Appetizers

Choose the **Major Group** needed (Ex. Lunch, Dinner, Bar etc).

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Choose the **Menu Page** needed (Ex. Apps).



Choose the **Menu Item** needed to place the order.

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Continue choosing **Menu Items** as described above

There may be times where a "forced modifier" must be chosen to complete the order, as in temperature for a steak. A "Forced Modifier window will appear and a modifier must be entered before the item can be finished.



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3.3 Sending the order

Once the order is completed it must be sent to the kitchen or bar.



Touch this button to go to the command page.

Choose from the following to continue.



Send &New *Send & Recall* *Send & Exit*

Send & **New**: Sends the order to be prepared and returns to the table screen to start a **New** check.
Send & **Recall**: Sends the order to be prepared and returns to a list of **Existing** open orders.
Send & **Exit**: Sends the order to be prepared and **Exits** the system for use by others.

REMEMBER: **Once an order has been "Sent", servers are unable to VOID or cancel any items. A manager must VOID or COMP the items.**

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3.4 Reordering/ Canceling Items

Reordering an item



After highlighting the item that needs to be re-ordered, press the "+" button to re-order the item exactly as it is shown

Canceling an item



Touch this button after highlighting the item from the current order.

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For Reorder of bar items a feature called "Last Round" is available. This feature allows for the reorder of ALL the items ordered on the last round from the bar.



If one or more items are not needed, cancel that specific item before "Send".

REMEMBER: This feature may not be available to all jobs.

NOTE: A Server can cancel an item that has NOT been "sent" yet, but cannot cancel or Void an item once the item has been sent. This is a management function.

3.5 Modifers, Forced or Options

There are two ways to add a Modifier to any item. The first is "**Forced Modifiers"** such as temperature on a steak.

"Optional Modifiers" is not forcing a choice to the item to be prepared by the kitchen, but is allowing ingredients to be added or removed from the item such as "no croutons" for a salad.

Optional Modifiers

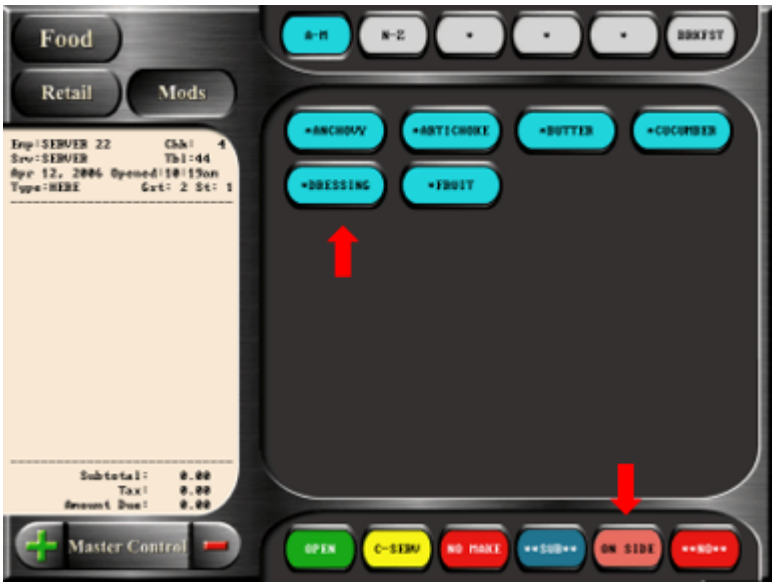
Menu ingredients are "Modifiers". To alter a menu item in some way, use "Mods".

Choose **Major Group** called **Mods**



The bottom row of buttons are "commands" such as NO, EXTRA, NO MAKE. Then choose the ingredient associated with the item, such as "croutons"

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Press Okay when finished.

REMEMBER: Modifiers follow the menu item. To change an item, modify it after the item is chosen.

Exchanging a Modifier



This feature will allow you to exchange a modifier for another at any time. If a modifier should be Medium but Medium Rare is entered, highlight the incorrect modifier and press "x-change". The system will know what set of "forced modifiers" needs to be displayed. Correct the modifier choice.

If it is an optional modifier, make the changes then press "done"

Inserting a Modifier



Allows user to insert a Modifier without having to cancel and re-ring the entire item. If an item needs to be changed prior to "sending" the item, pressing "insert" modifier after the item that needs to be altered.

Forced Modifiers

There may be times where a "forced modifier" must be chosen to complete the order, as in

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temperature for a steak. A "Forced Modifier window will appear and a modifier must be entered before the item can be finished.



3.6 Recalling an existing order

Recalling an existing order allows the server to add items onto an order or review the order

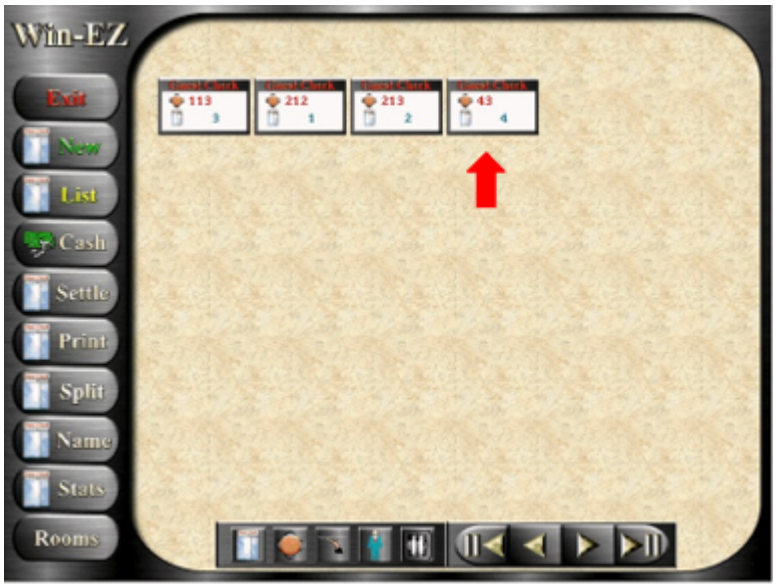
Enter employee number or swipe employee card

Touch "Recall"



Choose the check you want to make changes on.

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Enter new menu items as described in section **" Ordering Items "** then "**Sending an order"**

3.7 Kitchen Messages

Using the list of programmed "modifiers" is the fastest way to change a menu item, there will be time when the modifier is not programmed or the item is so changed that a "Message" will need to be sent to the kitchen or bar.

AFTER highlighting the item that needs more information for kitchen or bar prep.



Press the "Message Item" or "Message Keyboard" button.

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A large keyboard will allow a message to be typed for more information ON THAT ITEM ONLY.



There are two different "Message Item" Features in Win-EZ. One displays any typed messages to the kitchen at the TOP of the Kitchen/ Bar Prep Req. It will print "Special Instrustions" with the item being changed and the typed information following.

The second "Message Item" prints directly under the item being modified. Set up is located in *POS Settings/ Global/ Message Mods.*

3.8 Printing An Order

The Print Check feature can be accessed many way, the following is an example of two: While working in the check or from the Start Page.

To Print the guest check while working in an open check.

Finish any changes or additions needed to the check.

Touch Master Control.

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Touch the "Print" button.



This will print the check AND send any new items to the remote printers if necessary.

To print a guest check from the start page.

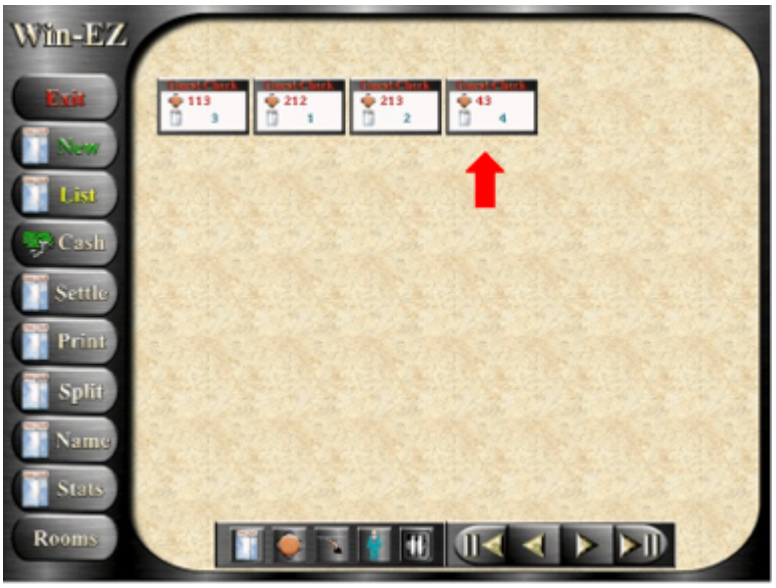
This function is also known as "Fast Print".

Enter employee number or Swipe Card

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Choose the check that needs to be printed.

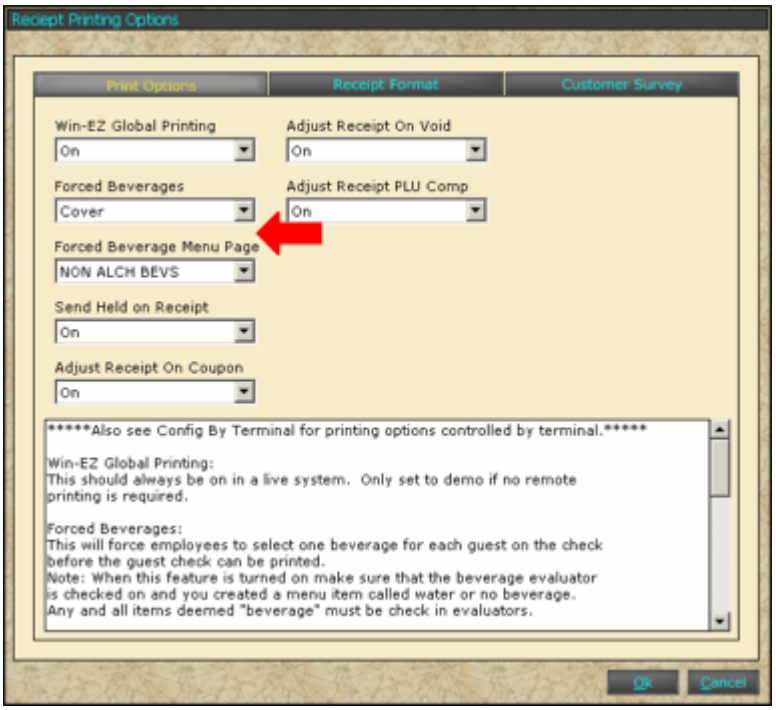


Print multiple checks or Exit from this screen.

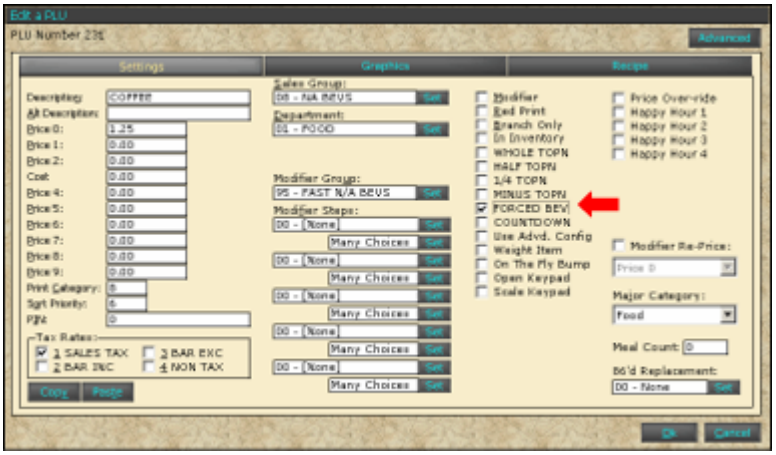
3.9 Forced Beverages and Groups

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 beverage evaluator is checked on and you created a menu item called *water or no beverage*. Any and all items deemed "beverage" must be check in evaluators.

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Note: When this feature is turned on make sure that the beverage evaluator is checked on and you created a menu item called *water or no beverage*. Any and all items deemed "beverage" must be check in evaluators.



Forced Beverage Pop-Up Window:
Enter the "Menu Page" that beverages are on in this area. It is determined when item programming is being done. A window will pop up with the Menu Page chosen for beverage choice. It is usually set to "Non Alcoholic Beverages" but any page with Beverages can be attached.

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.

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Pick up to three different "Sales Groups" to track and hold servers accountable. Example: Deserts 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. Now you can easily see who had the most "No Desserts" and correct the problem. Also if the check states"No Desserts" but there is a dessert on the table immediate action can be taken



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 groupp.

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Part



4 Cashier Service

In a cashier environment the server will enter the orders and present the guest check to the customer at the end of the meal. The guest check will contain a bar code that represents that checks number. Upon reaching the cashier station the guest will present the check to the cashier who will waive it under the bar code scanner provided. The check will be instantly recalled and ready for closing. This section will also cover phone orders and new orders placed at the cashier stand such as to go and carry out.

4.1 New Order

Enter employee number or swipe employee card

Touch "New Check".



As a "Cashier" the next screen will appear.

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Press "New" to begin a new check



Once "New" is pressed a choice of order type is given. Order type is printed on the remote checks so the kitchen knows how to package the order. If it is "here" it is usually served on plates while "To Go", "Pick Up", or "New Phone" is usually packaged in take out containers.

A window will appear for the choice.

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"Here" "To Go" or "Pick Up"

If "Here" " To Go" or "Pick Up" is chosen the next screen that is displayed is a keyboard. This is to enter in the customers name for later reference.



Type in the customers name and press "Done" when finished.

The menu pages will then appear. Order items described in the "Table Service, Ordering items section of this manual.

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When finished ordering the menu items, press "Exit" or "Master Control, Send and Exit" to leave this check.



Once exit or send is pressed, a guest check will automatically print and the screen will return to the beginning cashier screen to continue with other orders.

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4.2 Phone Order

When placing a new Phone order, more information is needed. Phone orders are generally used if a delivery system is being used. This allows for phone, addresses, Last order and Special instructions to be entered for repeat customer information.

Press "New"



Choose the "New Phone" Button.



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At the following screen, some choices must be made. If it is an existing customer, by entering their phone number, Asking for a list by name, account or phone number, the information already stored in the system will be displayed.





If the customer is new, Start by entering the new phone number and pressing "Enter".



Enter the information needed for the customer database such as name, address, any special instructions on either the keyboard on the screen or physical keyboard, if one is provided at the terminal.

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If the customer is already in the database, use the following buttons





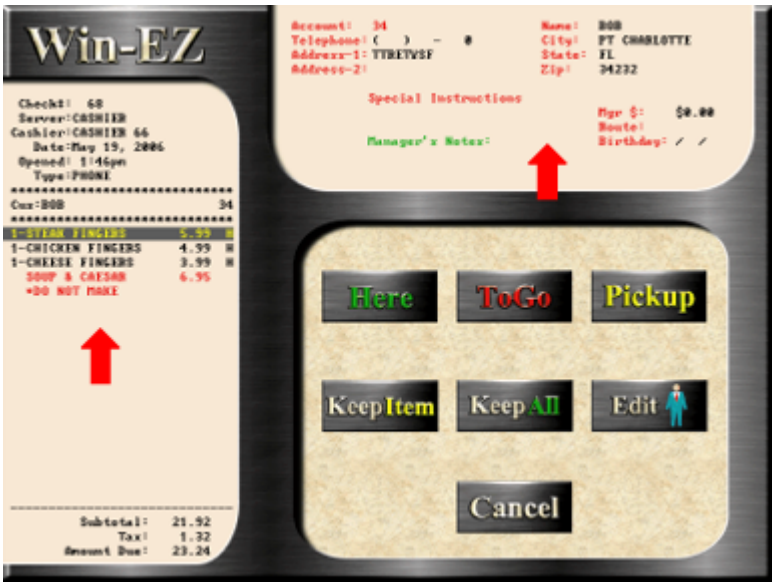
Either button will provide a list of customers already in the database



Choose the customer needed.

If it is an existing customer, the items from the last time they ordered will show, along with their customer information.

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If the customer orders the same items, by using the "Keep Item" or "Keep All" will save time when ordering items.

Choose "Here" "To Go" or "Pick Up" as an order type for packaging.



If the "Media at Start" feature is on, ask how the customer will pay. This is especially helpful in a delivery environment.

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Order items needed.



When finished, press "Exit" or "Master Control".

4.3 Recall Orders

The Cashier has the ability to access ALL guest checks open at the time. The Cashier has the ability to recall someone else's check and close it, with the sales staying with the server but the media going to the cashier.

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At the Start Screen

Press "New Order"



This will show a list of all open checks.



Choose what function that needs to be done such as Settling a check, printing a check, or Adjusting a check.

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Then choose the check from the list.

The system has the ability to sort by Server, Check, Table or Order Type for easier look up. If the system is using a "Bar Code Scanner" system, every guest check will print with a bar code for easy recall.

4.4 Print Last

To Print a receipt for the last order, the feature is usually added to the command area.



Press the

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This feature is helpful if the last customer returns requesting a receipt.

4.5 No Sale

To open the cash drawer, press "No Sale" on the Recall screen.



A large "No Sale" will appear.



Press the Large "No Sale" and the cash drawer will pop open

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A "No Sale" button can also be placed on the "Other" page for cashiers, if the cashier is sharing the terminal with other employees.

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Part V

5 Bartender Service

In this section bartenders will learn the basics of ordering bar items, starting new tabs and recalling existing tabs. In order functions such as selecting and adding regulars to the list as well as using the last round feature will be covered. Bartenders have many potential options and features depending on how the bar is run whether ringing automatic doubles, looking up drink recipes in the Win-EZ Recipe Book or making change for a customer and gaining drawer access with the no sale feature.

5.1 New Tab

From the Start Page

Enter employee number or swipe employee card.

Touch "New Check".



After pressing "New Check", depending on system set up, the bartender will be prompted to enter in a "Name" for the tab.

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Press "Done" when the name is entered.

If there is list of "Regular" Customers, Press "Regulars".



This will provide a list of all stored Regulars to choose from instead of typing in the regular's name each time

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After you highlight the regular, press



The next page will be the "Fast Bar" Screen

The bartender can now enter the drinks ordered for this "Tab". Because the bar makes the drinks, no remote printing is done.

Each "Fast Bar" Screen is set up for speed and ease of use for each restaurant.



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The first column is "Well Drinks", the second is "Call Liquors". The "Call" liquors bring up a window with all the liquors, regardless of the level of the liquor (Premium, Call, Super Premium). It is a list of any named liquor.



Choose the call item needed, the item is ordered and returns to the "Fast Bar" screen. When all the items are ordered, the bartender has a few options on "saving" the tab.

The buttons in the middle of the page are other stored tabs. Pressing a different tab take the bartender to a different tab.



To start a new tab while in an open tab, the bartender can use the "Tab" Button which stores the current tab and starts a new tab with the keyboard or using the

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"Master Control" feature can start a new check, store the open tab while recalling a new tab or any other functions the bar has available to them.



The bartender can also "fast cash" the tab. This means that no tab is opened, and the item is paid for at the time.



If this command is given, the check is closed to cash with the exact amount of the check.

By using the "Fast Settle" option, the next screen with be the media page, this allows the bartender to close the check out to a different media other than cash such as credit card or house account.

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The bartender adds the media needed to the check and closes the check as described in "Closing an order" section.



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5.2 Last Round

Last Round is an easy, fast way for bartenders to order the "last round" for a customer without having to press as many buttons. This feature is also available to servers if desired.



When the "Last Round" feature is used, the items are ordered exactly like the previous round.



If an item is not needed for that round, simply highlight the item and press the "Minus" button.

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REMEMBER: IF LAST ROUND IS USED THE "NEW" LAST ROUND IS STORED WITHOUT
THE ITEMS FROM THE ORIGINAL ROUND.

5.3 Recall Tabs

Recalling a tab can be done various way, depending on where in the ordering process the bartender is.

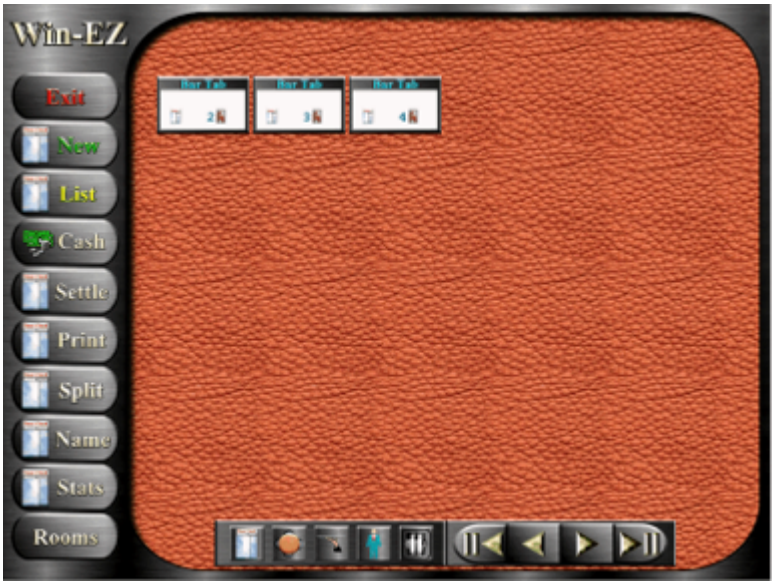
If the bartender has a tab open and wants to add something to a different tab, pressing the tab needed from the list of tabs in the middle of the "Fast Bar" Screen is the fastest way.

The buttons in the middle of the page are other stored tabs. Pressing a different tab will take the bartender to a different tab.

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If the bartender has advanced to the "Master Control" page for adjustment on the open tab, Pressing "Send & Recall" will bring the bartender to the "Recall" Screen where they can do many functions.



5.4 Pre Authorize Credit Card

Pre Authorizing a Credit card means instead of taking a customers credit card and holding it throughout the night, the bartender "Pre Authorizes" the card for a specific amount of money so the bartender can return the credit card to the customer.

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To Pre Authorize the card, start a new tab, press the "Pre Auto" button.



Enter the amount of money to be "Pre Authorized".



Swipe the credit card.



After the card is authorized with the amount, a verification receipt will print. THIS IS NOT A LEGAL SIGNED COPY. This can be used for a customers signature to verify they have been pre authorized for a certain amount.

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After a card is pre authorized on a tab the tab name is changed to the cardholders name



Order the items needed.

REMEMBER: PRE AUTHORIZATION CAN ONLY BE USED ONCE. WHEN THE PRE APROVED AMOUNT IS REACHED, THE CARD HAS TO AUTHORIZED AGAIN. THE PRE AUTHORIZATION DOES NOT RE AUTHROIZE AUTOMATICALLY.

Once all the items are placed and it is time to close the tab, the bartender can either use the Pre Authorized credit card or use a different card or media.

To use the same card Press the "Settle" Button from within the open tab.



Press the Credit Card Button.



A message will display asking if the Pre Authorized credit card should be used or use a new card, choose the option needed.

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If Pre-Auth" is chosen, the card will process as a normal card producing 2 credit card receipts. If new is chosen, a new card must be swiped.

If a different media is being used, such as cash, continue to apply the media as explained in "Closing an Order". The Pre-Authorized credit card will be deleted after the tab is closed.

5.5 Doubles

Doubles are used if it is set up in the product database. Doubles are very specifically set up, but easy to use for bartenders.

On the tab that the double is needed, order the item that is set up as a double and Press "Double".

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The double price is added as a modifier.



Continue with the order as normal.

5.6 No Sale

To open the cash drawer without a sale is a "No Sale". Depending on where the command function button is, the procedure is very basic.

While in a Tab

Press "No Sale"

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A screen with the words "No Sale" will display

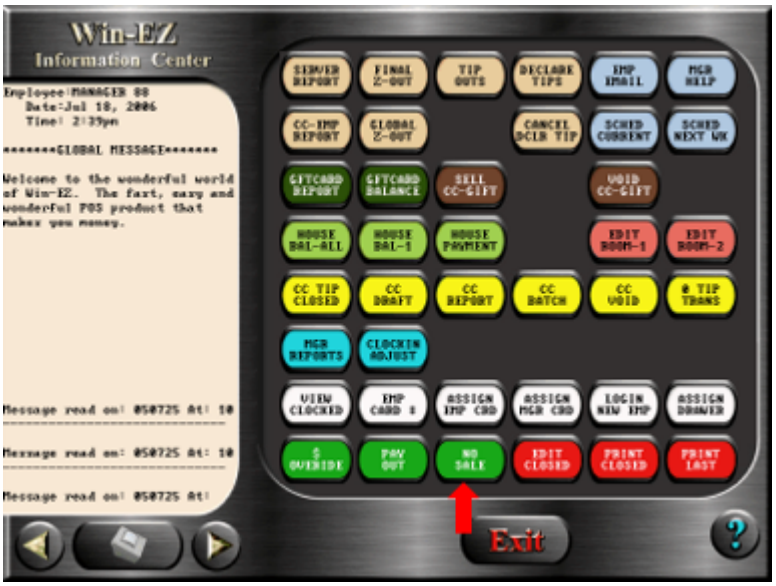


Press the large "No Sale" for the cash drawer to open.

No Sale is determined by job code. If the command is on the bartender screen with a tab open, anyone staff member can open the cash drawer.

The "No Sale" feature is also commonly placed on the managers "Other" Screen for manager access into the cash drawer. This feature can sometimes be found on the bartenders "Other" page also.

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5.7 Drink Recipe Book

The Drink Recipe book is a feature most beneficial to bartenders. It is stocked with the basic drinks that bartenders use. To access "Recipe Book" the feature must be added to the Bartender's Master Control Page.



After pressing "Recipe Book" a list will display showing the alphabet. Highlight the letter for the drink that the recipe is needed for.

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Next choose the drink from that list, Press Okay



The cocktail recipe will be displayed.

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It can either be made from the screen or printed by pressing the print button.

When finished, press the "X" to return to the "Master Control" Page.

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Part VI

6 Master Control Funtions

Win-EZ has been designed in such a way that every job code has its own master control page. The master control page houses functions that are needed inside a check. By placing only the commands needed for that job code the system will be much easier to maintain and learn for new employees. This will take a little longer to set up but will pay for itself ten fold in the future.

The MASTER CONTROL functions are options for controlling the check. This page is customizable by job code to the restaurant's specific needs. Below is an explanation of some of the most frequently used Master control commands. Win-EZ has over 200 commands. With Win-EZ, each restaurant has the ability to assign certain functions to certain jobs. For example, a server may be allowed to transfer checks, while the bartender cannot.

******* SEND AND NEW *******
Sends the order to the preparation stations and returns to the correct entry screen to start a new order.

******* SEND AND RECALL *******
Sends the order to the preparation stations and returns to a list of existing checks.

******* SEND AND EXIT *******
Sends the order to the preparation stations and exits to the new order screen.



NOTE: The "Send &..." buttons cannot be removed from the Master Control Page. All other buttons are user definable.

******* INSERT MODIFIER *******
This inserts a modifier into any place of the item ordered, preventing a need to erase the order to correct a modifier mistake.



******* SUBSTITUTE ITEM *******
This substitutes the modifier for another choice, preventing a need to erase the order to correct a mistake. Highlight the item to substitute and press this button.

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****** *QUANTITY* ******
This will order multiple items. First order the item, then highlight the item and touch the quantity button, then select how many are needed. This will order the exact item, including modifiers for the quantity needed.



****** *PRINT CHECK* ******
This will print a copy of the check.



****** *SPLIT CHECK* ******
This will split the check into multiple checks. If seat number is being used it will split the items to individual checks using the assigned seat numbers.



****** *COMBINE CHECKS* ******
This will combine two checks together. Select the check to be combined then use the combine button. Then choose the check to be combined with it. The check will keep the first check number and the second check will then be a null check (zero out and closed in the check register).

****** *MOVE ITEM* ******
This will move a single or multiple items from one check to another. Select the check that the items needs to be moved from, then use the move item button. Then select the check the items needs to be moved to. Highlight the item and select "move".

****** *CANCEL ALL* ******
This button can be used only when no items have been sent to the preparation station. This will delete all the items and cancel the check. If items have been sent it will delete only unsent items.

****** *HOLD AND FIRE* ******
By highlighting the item and touching the hold and fire button the items can be entered it into the computer but it will not be sent to the preparation station. Notice a "H" next to the item which means that it is on "hold". Items on hold can be deleted

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because they have not been sent to the preparation station. When the items are ready to be sent, highlight it and touch the hold and fire button again. A "one" will be displayed next to the item to show it is no longer on "hold". If using seat assignments, the item cannot be assigned to a seat until after it has been sent to the preparation station. The item will need to be assigned to the seat after it has been taken off hold. Use 'Highlight Item Seat keypad" to take an item off "Hold & Fire" and assign a set number at the same time.

****** *SPLIT ITEM* ******
The split item will split an individual item into multiple amounts due. This feature can recombine the split item as well.

****** *LAST ROUND* ******
This button is used for ordering an identical order of the last round. It will remember the last order placed. Items can still be added or removed prior to sending the check. The new last round will be remembered.



*********KITCHEN ITEM******
Enter up to three lines of text messaging for the kitchen and the bar. Once three lines have been entered a warning window will appear and ask if the third line should be overwritten. This feature only works on new main menu items not sent to the preparation stations.



****** *SEAT UP* ******
This will move up the list of seat numbers when assigning seats.

****** *SEAT DOWN* ******
This will move down the list of seat numbers when assigning seats.

****** *SEAT KEYPAD* ******
This will jump directly to a specific seat number when assigning seats.

****** *TRANSFER SERVER* ******
This will transfer a check from one employee to another. This may be set to be a manager function for security reasons.

*********PRINT NUTRITIONAL RECEIPT*******
Allows user to print a receipt containing point value and nutritional information for each menu item. This feature works for modifiers as well which is great for "NO" items. These can contain a minus calorie count and "Add modifiers can contain the

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additional stats for that add-on.



6.1 Printing a Check

The Print check feature can be accessed many ways.

To Print the guest check while working in an open check:

Finish any changes or additions needed to the check

Touch ***Master Control***



Touch ***Print***



This will send any unsent items to be prepared.

To Print a guest check from the start page

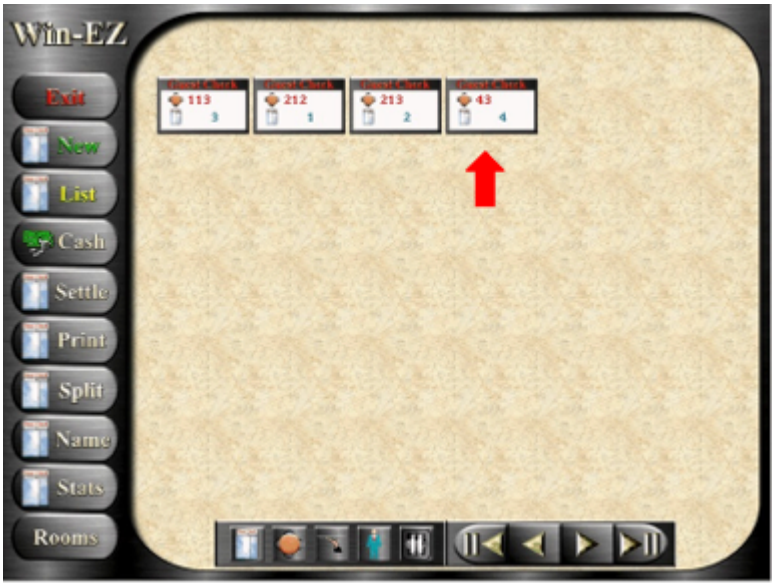
This function is also know as "Fast Print".

Enter employee number or Swipe card.

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Choose the check to be printed.



The check will print.....in 3 easy steps!

6.2 Printing with Service Charges

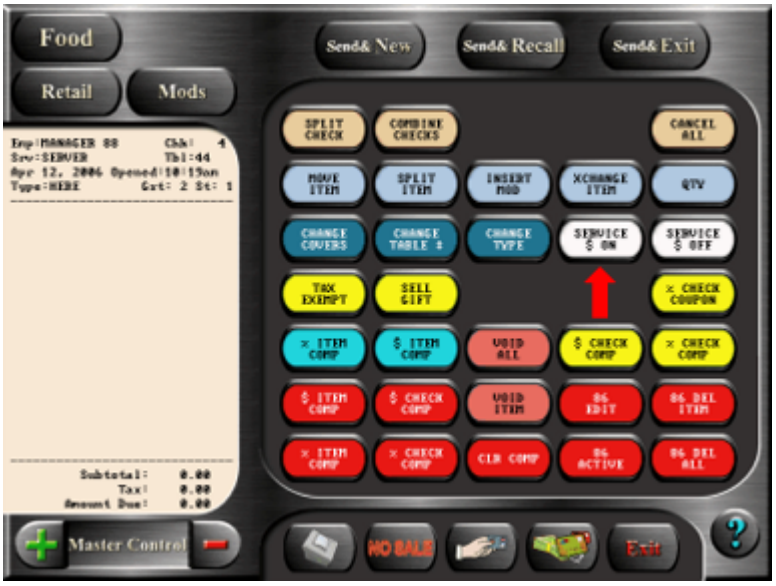
While each restaurant has different styles, it also has different rules for "Suggested Gratuity" or Service Charges.

A common rule is: Parties of 8 or more there is an automatic 18% Gratuity. Win-EZ allows for this rule.

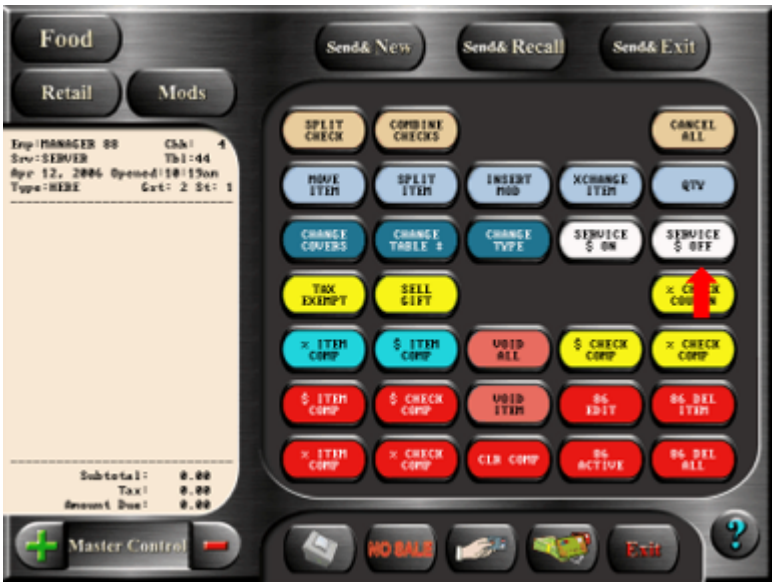
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When a server starts a guest check, a cover count is asked. If the above rule applies, any guest check with 8 or more covers will print with a "Service Charge" at the bottom of the guest check. This feature is only for reference. It does not add into any monies due to a server. If "Service Charge" is on in POS Settings/ Media/ Credit Card, the gratuity will be added to the credit card PRIOR to "Submit". This feature allows servers to change the gratuity prior to "Submit" and adds an extra line on the processed credit card slip to allow for added gratuity.

If a table is under 8 guest, a server (with this feature ability) can print the check with a set percentage or definable amount.



If the guest count is over 8, but the server does not want the "Suggested Gratuity" printed on the check, Press "Service $ off" will remove the suggested gratuity.



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After either button is pushed, a receipt will print.

6.3 Spliting a Check

While it is a feature of the system to split checks as you are ringing the item up, most restaurants use the split checks feature as is. This feature can also be accessed through the "**FAST**" buttons on the **Start** Page

To Split checks while working in a check

Finish any changes or additions needed to the check

Touch ***Master Control***



Touch ***Split check***



A screen will appear with the original check on the left and 4 smaller checks on the right



Touch item or items you wish to split to a separate check,
Touch check #2 to move the selected items.

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Continue to do this until the checks are split as needed.
When satisfied with the checks, Touch ***Done*** button.

A message will appear that says:



Press Okay to continue or "x" to keep the changes per seat but not print or separate the check by check number.

NOTE: After the checks are split , the original check will no longer be listed on the Recall list but will be replaced with checks in order of split checks with numbers in the third column for reference along with the table number in the second column.

To Split a check from the Start Page
To use this option,

Enter employee number or Swipe card

Touch **Check Adjust**

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Choose which Check to be Split and continue as described above.

By using "Fast" features, many steps are eliminated.

REMEMBER: COMPS, DISCOUNTS, VOIDS AND COUPONS MUST BE DONE AFTER SPLIT CHECK FUNCTION IS PREFORMED.

6.4 Moving Items

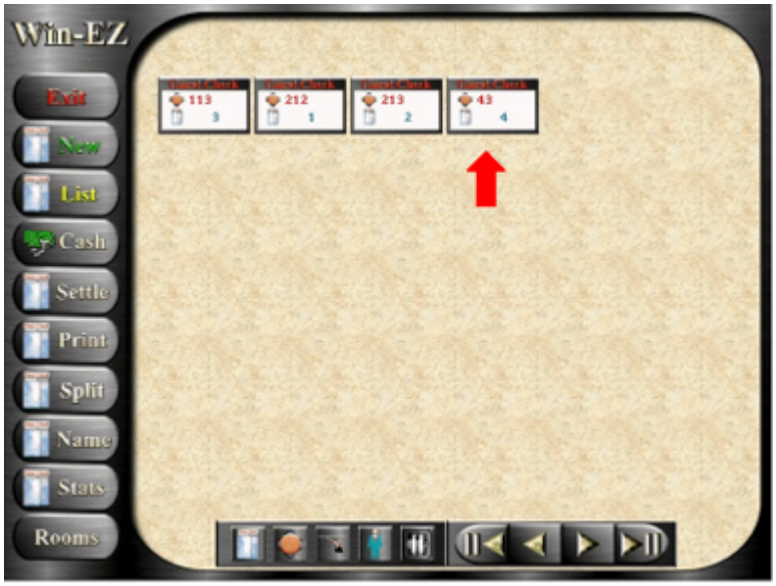
This function allows you to move one item from a check to a different check. This usually is needed after a split check is performed incorrectly.

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Enter Employee Number or Swipe card.

Touch "Recall" on the Start Page.

Choose the check that has the ***INCORRECT*** item listed to go into the check.



Touch "Master Control".

Touch "Move Item".



Choose the check the items are to be moved to.

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Highlight item that needs to be moved.



Press "Move"



The item will then be removed from original check but moved to the check selected

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REMEMBER: Only one item can be moved at a time, but continue to move items from original check to selected check to correct the check until the checks are correct.

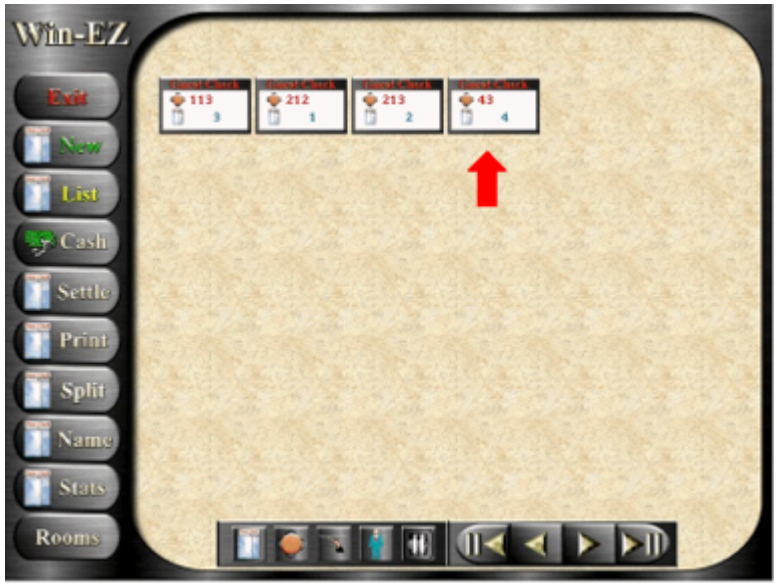
6.5 Combining Checks

This function will "Unsplit" or combine checks back together after the check has been split. Only one check can be combined at a time.

Enter the Employee Number or Swipe card

Touch "Recall" on the Start Page.

Choose the check to be combined with another.



Touch "Master Control".

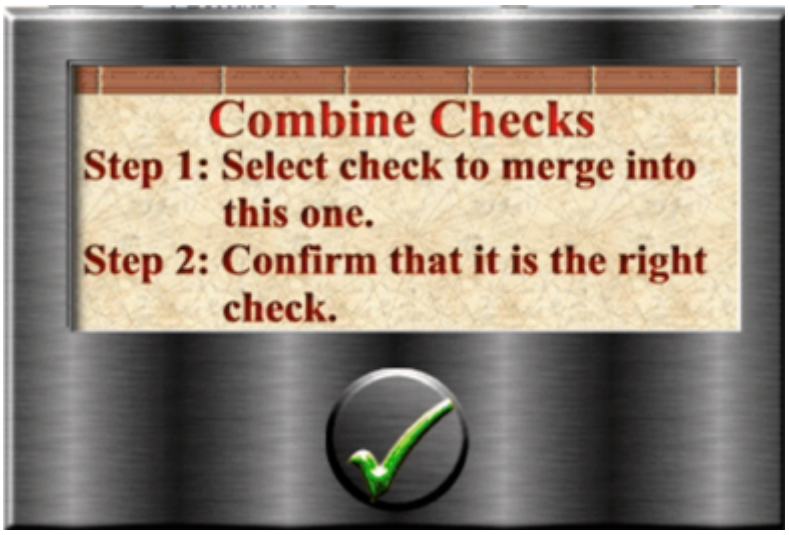


Touch "Combine".



There will be an instructional message to explain how to continue with this feature.

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Press "Okay".

Choose the table to combine with original check.



The check that is being combined into the original check will be displayed to confirm it is the correct check. At this point, if it is the incorrect check, press the "x" to cancel combining the checks.

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If it is the correct check, press "okay"

The checks are now combined on the first check number.

6.6 Message Item

Using the list of programmed "modifiers" is the fastest way to change a menu item, there will be time when the modifier is not programmed or the item is so changed that a "Message" will need to be sent to the kitchen or bar.

AFTER highlighting the item that needs more information for kitchen or bar prep



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Press the "Message Item" or "Message Keyboard" button.





A large keyboard will allow a message to be typed for more information ON THAT ITEM ONLY.



There are two different "Message Item" Features in Win-EZ. One displays any typed messages to the kitchen at the TOP of the Kitchen/ Bar Prep Req. It will print "Special Instrustions" with the item being changed and the typed information following.

The second "Message Item" prints directly under the item being modified. Set up is located in *POS Settings/ Global/ Message Mods.*

6.7 Hold/ Fire

Some restaurants operate with a "Hold/Fire" concept. This means that the server takes the customers whole order at one time, but needs to "course" it. The kitchen will only see the course needed for correct dining time. "Hold/ Fire" allows the server to enter the whole order, but only "Fire" to the kitchen when that course it needed. This eliminates food arriving to the customer before the last course was finished.

To place items on "Hold" and to "Fire" them to the kitchen is the same button. It will know which procedure to do. Enter the items needed for the table, as described in "New Order" and Press "Master Control"

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Highlight the item that is going to be placed on "Hold".



The #1, which tells the system to "Fire" the order will change to the letter "H" for Hold. "Send" the order.

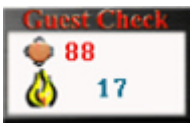
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When any items are on "Hold" the following message will appear. This message will be displayed for EVERY check that server accesses, not just the check with "Hold" items as a reminder that items are "On Hold". This is a feature that can be turned on or off in POS Settings.



Another reminder for servers with items "On Hold" is from the "Recall Screen". The check with items "On Hold" will display the following.



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To remove the "On Hold" to "Fire" the items, highlight the items to be fired and press the "Hold & Fire" Button. It will change the items print status to "1". The items will then be "Fired" when "Send" is done.

There is also a "Hold Entire Check" and "Fire Entire Check". Add those commands to the "Master Control" Page.

6.8 Log In as Manager/ Log off

This feature was designed to make manager adjustments easier. Within a server's open check, a manager can "Log In" to make adjustments such as voids and comps without having to exit the check. After the adjustment is made, a manager can "Log Back" to give control of the check back to a server. This feature is password protected for added security.

From the Servers "Master Control" Control Page.

Press "Mgr Login".



For security purposes Enter Manager Number or Swipe the manager card.

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Followed by Manager Password



After password security is entered, the Manager "Master Control" page will appear.

Make any necessary changes to the check.

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After adjustments are made, Press



To log off as a manger and give control of the check back to the server.

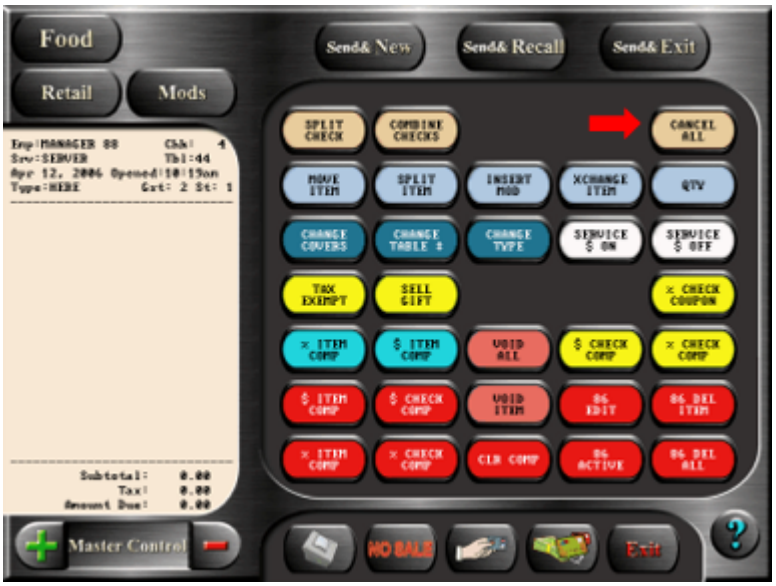
6.9 Cancel All

Servers have the ability to cancel items PRIOR to sending any items to the kitchen and bar to be made. It is usually done one item at a time, if an item is not needed by pressing the MINUS button but sometimes the whole check needs to be canceled.

NOTE: This feature will only remove items not yet sent to be made. If items are sent, it usually requires management status to remove the item.

To "Cancel All" on "Master Control" Page. Press "Cancel All"

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NOTE: If there are no items entered, and "Cancel All" is used all items will be canceled and the check will automatically close. If there are items on the check, it will cancel any new items not sent to be made.

6.10 Quantity

To enter more than one like item at a time, press the PLUS button.



If more then one item is needed, for example: 5 sodas, choose the item needed and use the "Quantity" Button.

Press "Master Control".

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Highlight the item needed.

Press "Quantity".



Choose the quantity desired, or use the keypad for amounts greater then 10.



The amount needed will be ordered.

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Complete order as needed.

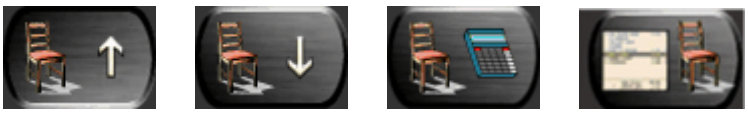
6.11 Seat Up/ Down

Splitting checks after the whole order is placed is the most common way to sperate checks, some restaurants use seat assignments for expediters, or for large parties. Win-EZ allows each item to be assigned by seat by the use of the "Seat Up/ Seat Down or Seat keypad.

From the Master Control Page.

Select one of the following as needed. Seat UP, Seat DOWN, Seat KEYPAD, Seat ITEM

Seat UP advances the seat number by one. Seat DOWN decreases the seat number by one. Seat KEYPAD changes the seat to a specific number. Seat ITEM changes the item to a specific number.



By changing seat assignment, the check is automatically split by seat when "Split Check" feature is used.

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If Seat 1 & 3 belong on the same check and 2 & 4 go together, the system will group together the seats chosen by the server. Use "Split seat to New Check" from "Master Control" Page

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Choose which seats belong together and press "Add". After all the seats are added press "Done"



This will combine just the seats together onto different checks. Print the checks as described.

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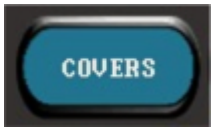
6.12 Guest Check Changes

Changes to a guest check is common. There are many reasons to do so such as changing cover count, transferring a check to a different server if the party has moved, changing table number or order type (here, to go, take out).

To Change the Guest Count on a check.
Touch "Master Control".



Touch "Covers"



Touch the correct cover count.



To Change Table Number
Touch "Master Control"



Press "Change Table #"

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Enter the new table number

To Transfer Server
NOTE: Not all servers have this ability, this may be a manager only function.

Touch Master Control



Press "Transfer Server"

At this point, the server who is accepting the table must enter his or her server number or choose from a list of names.

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The system gives the option to transfer one or all check from the original employee to the new employee.



This feature is helpful when transferring multiple checks if one employee is leaving for the day.

To change Order type

Changing order type helps the kitchen package items as needed. As the default, the system will assign "Here" as the order type if a table is opened.

Touch "Master Control"

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Select "Change Type"

Choose which order type is needed from the list



Press "OKAY" To complete the change



6.13 Drivers License Scan

Written for Texas and Florida to allow scanning of drivers license to determine age of the holder. A nice way to catch fake I.D.'s All this feature requires is a magnetic encoding on the drivers license. This feature allows a server or bartender to swipe a driver's license. The system will produce an auto print out with the server name, employee name, table number date, customer name, customer age, customer birth date, check number and load the customer name into the tab name for bar tabs.

The system will also print the approval status on the bar remote print jobs to alert the bartender that the check has been approved.

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If required the system will not allow bar items to be ordered unless the check status is approved or is over-ridden by a manager.

To Scan a Drivers License
Touch Master Control



Choose



And "swipe" the drivers license.



6.13.1 Manager Override

Written for Texas and Florida to allow for the over-riding and forced approval of a drivers license. The system will produce an auto print out with the server name, employee name, table number date, customer name, customer age, customer birth date, check number and **the manager's name as the approval status**.

6.14 Berg Interface

This feature is designed to be used with the "Berg" Liquor Dispensing system.

Select the [BERG] button and the system will bring up a window with a check listing in it. As you pour drinks the system will automatically order the correct PLU and wait for the next pour. Upon completion touch [X] or close button and the pour session is complete.

Technical Note: Be sure to have the same Product Item numbers programmed into the Berg system are the same as in your Win-EZ system. Please note that the Berg

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interface comes defaulted on Com-2, 9600 baud, 8,1. and a special pin-out on the com cable may be required. See Berg's specifications to be sure that the right cable is being used.

6.15 Hotel Inquiry

Enter topic text here.

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Part



7 Closing an order

This is a very important part of the Win-EZ System. The revenue that is tracked is the backbone of proper accounting procedures. This section covers the different media methods available and how to close checks. There are many different ways to tender a check whether it be with multiple media's divided by dollar amount or multiple credit cards split down the middle.

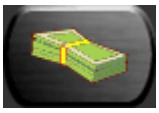
Because Win-EZ is so versatile, there are numerous ways to apply "Media" to checks. The follow buttons are a few examples. The buttons can be added to certain job codes, menu pages and Master Control pages with the "Button Editor" function in Win-EZ manager. For help with the function, refer to the "Button Editor" section of the Win-EZ Manager manual.

Fast Settle



This is the button to touch when ready to apply a payment to this check. It will take show the payment options screen.

Fast Cash



This this button is to go to the payment screen and will automatically apply exact amount of cash to the check, giving no change due. If the system is needed to make change, use the Fast Settle Button

Settle with Cash Keypad



This will give a keypad where the amount of cash received may be entered. Then select the close button to receive the change due.

Pre authorization of credit card



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This will give a keypad so that a "Pre Authorization" on a credit card can be done, which holds the credit card information in the system until it is ready to close the check.

REMEMBER: The "Fast Cash" and "Fast Settle" button is always on the start screen.



After choosing what type of media, the next screen will always be the "Settle" Screen



From this screen, choose the media and continue as described in the following pages.

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7.1 Cash

To Settle the check from the Menu Page press the "FAST CASH".



This will settle this check to the exact amount of the check.



Next the check will need to be "Closed". There are three different ways to close a check.

- **Close and Exit**-Closes the check and goes to the "Start" Page.
- **Close and Recall**-Closes the check and shows a list of open checks.
- **Close and New**-Closes the check then immediately starts a new check.

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If this is the incorrect media for this check PRIOR to pressing a "Close and..." button



The "Oops" button will remove the "Fast Cash" media from the check. After the media is removed, proceed with the correct media needed to close the check.

NOTE: ONCE THE CHECK IS CLOSED, IT REQUIRES A MANAGER TO REOPEN THE CHECK ALWAYS CONFIRM THE CHECK WITH THE CORRECT MEDIA IS APPLIED PRIOR TO "CLOSE AND ..."

7.2 Credit Card

To Settle the check from the Menu Page press the "Settle Button":



While on the "Settle" page

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Swipe the card and push the Submit button.



Seconds later the receipt will print out.

IMPORTANT: Press the 

button on the top left of the page.

<u>Not the "Close and ....</u> so you can recall the check to put the Tip in.

If the check was closed with out a tip, it can be added later in the "Other" Button Functions

Adding a Gratuity prior to Submitting Credit Card
Win-EZ has the ability to enter a Gratuity prior to submitting a credit card for authorization. This feature can have several levels of security: for servers, cashiers or managers. If the feature of "Apply Service Charge" is on in POS Settings/ Media/ Credit card, any added gratuity will be added prior to "Submit"

Press



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Enter the Gratuity Amount and press



Void a Credit Card on an open check
This feature is for voiding a credit card that was entered onto the wrong check. Once the credit card is "voided", all record of the transaction is deleted. This means the **physical card** must be swiped again. This feature may not be available to all job codes due to security levels selected.



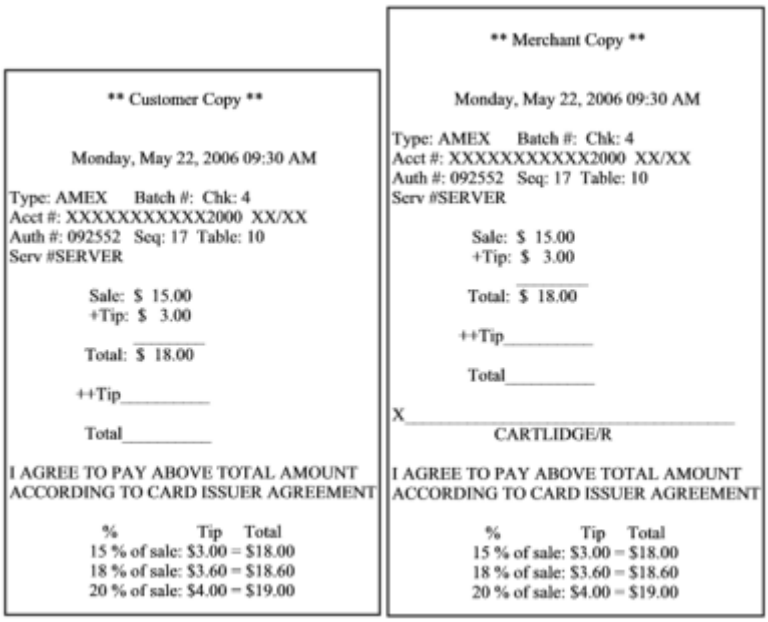
Adding a tip to an open credit card
When you are ready to put your tip in, Recall the check and Press the **CCTIP** command, enter your tip in, then close.



Note: The **OOPS!** button will take off any payment made to the check by mistake ***Except*** for credit card and gift card, you will need to void the charge to remove a credit card payment.

CC Draft
This function allows for reprinting of a credit card customer and merchant copy

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** Customer Copy **

Monday, May 22, 2006 09:30 AM

Type: AMEX Batch #: Chk: 4
Acct #: XXXXXXXXXXX2000 XX/XX
Auth #: 092552 Seq: 17 Table: 10
Serv #SERVER

Sale: $ 15.00
+Tip: $ 3.00
Total: $ 18.00

++Tip_____

Total_____

I AGREE TO PAY ABOVE TOTAL AMOUNT
ACCORDING TO CARD ISSUER AGREEMENT

%	Tip	Total
15 % of sale:	$3.00	= $18.00
18 % of sale:	$3.60	= $18.60
20 % of sale:	$4.00	= $19.00

** Merchant Copy **

Monday, May 22, 2006 09:30 AM

Type: AMEX Batch #: Chk: 4
Acct #: XXXXXXXXXXX2000 XX/XX
Auth #: 092552 Seq: 17 Table: 10
Serv #SERVER

Sale: $ 15.00
+Tip: $ 3.00
Total: $ 18.00

++Tip_____

Total_____

X_____
CARTLIDGE/R

I AGREE TO PAY ABOVE TOTAL AMOUNT
ACCORDING TO CARD ISSUER AGREEMENT

%	Tip	Total
15 % of sale:	$3.00	= $18.00
18 % of sale:	$3.60	= $18.60
20 % of sale:	$4.00	= $19.00

This feature can be either a manager function or a server function.

From the "Other" page



Press "CC Draft"



Enter the Check Number for the credit card to be reprinted

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In the "Other Function" features the Void Credit Card and Tip Closed. The following features are described in Section "Other Functions" and "End of Day Reports, Tip Closed Check"

7.3 House Accounts

To close a check to a House account go to the settle page.



Press the "House" Button.

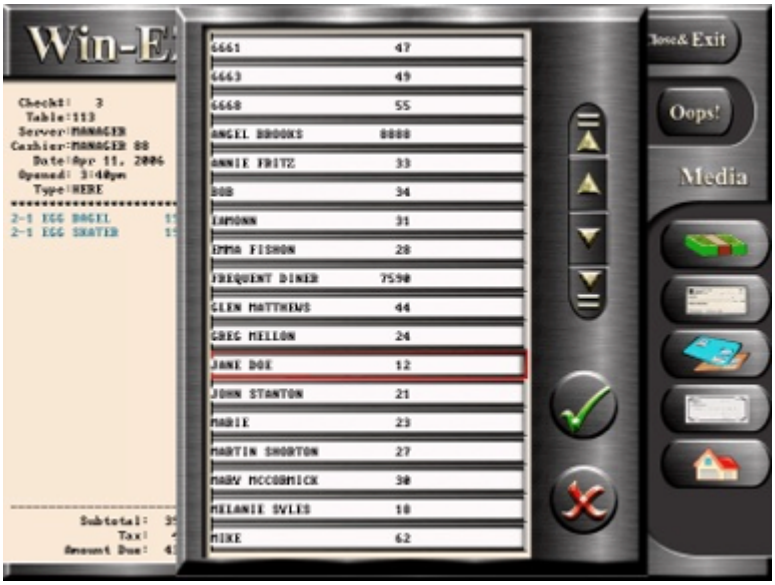
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Either enter the account number in, or push list.



Highlight the name of the account.



Press "okay"

Enter tip amount

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Press "Okay".

At this point, the check needs to be closed with the "Close and ..." Function.

7.4 Personal Check

At the "Settle" Page



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On the keypad, enter the amount of the check.

Press the Check Button



This will apply that amount to the check.

NOTE: Win-EZ allows for "over tendering" of certain media's. If the guest check was for $20 and the customer tips, this is considered an "overtender" with the balance of all NON cash media's as gratuity to be deducted from the "Cash Tender". This function is set up in POS Settings/Media at the owners discretion.

7.5 Gift Certificate

To close a check to a gift certificate, on the settle page



Type in the gift certificate amount into the keypad.

Press the Gift Certificate Button.

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This will close the check to Gift Certificate.

NOTE: Win-EZ allows for "over tendering" of certain media's. If the guest check was for $20 and the customer tips, this is considered an "over tender" with the balance of all NON cash media's as gratuity to be deducted from the "Cash Tender". This function is set up in POS Settings/Media at the owners discretion

7.6 Gift Card

Based on the credit card company used, Win-EZ processes Gift Cards differently. One is called "Internal", meaning the card database is located within the program. "External" Gift Cards are a feature of certain credit card companies or media only.

Gift Card, Internal or Media Only
On the Settle page



Press the "Gift Card" Button



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Swipe the Gift Card

For Internal Gift card or Media only an over tender may be allowed.

Note: The OOPS! button will take off any payment made to the check by mistake. Except for credit card and "External" gift card, you will need to void the charge to remove a credit card payment.

Gift Card, External
An External Gift Card works like a credit card as it is processed through the credit card company.

To use an Eternal Gift card, refer to the Credit Card section of this manual.

7.7 Multiple Tenders

Multiple Tenders is when the guest check has two or more different media's.

At the settle page



Enter the Amount of the first Media, or Preset Fractions.



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Press the first media to be applied

A Balance will show at the lower left part of the screen.



Enter the amount of the second media. If the balance due is being used with a credit card, swipe the card from this screen and press "Submit".

With two or more credit cards
The feature works the same with two credit cards as with a credit card and cash. Choose the amount with the keypad or the preset fractions, swipe the first card. Balance due will show after the first card is processed, swipe the second card. Continue until no balance is due.

Note: The fraction always applies to the original total of the check not the remaining amount due.

7.8 Printing Reciept

This will print a copy of the check, with the type and amount of media collected as a receipt.

At the "Settle" Screen

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Press the "Printer" Button.



This may not be necessary, depending on the set up. Each Media (Cash, Credit Card, House Account) may be set up to produce a receipt on "Close"

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Part VIII

8 End of Day Reports

End of day reports allow the managers to know that the servers, bartender and cashiers are all in balance before they leave. Understanding what end of shift reports to print and how to read them is paramount to the ease of end of shift transitions. This section will show how to balance, how to find out how much money to collect and how to declare tips.

From the Start Page, Press "Other"



8.1 Server Report "X"

This report is for the servers and bartenders. It is also refereed to by the name of "X" reports similar to the "old fashion" cash register terms.

This report shows Cash Tender, Credit Card Totals, Total Sales, and statistics. Servers can access this report for server bank functions.

This report shows all totals, with open checks not included. A Server Report can be run at any time during a shift, but the "Final-Z" is run at the end of a shift, and cannot be done with open checks.

To run a Server Report

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Press "Other"



Press "Server Report"

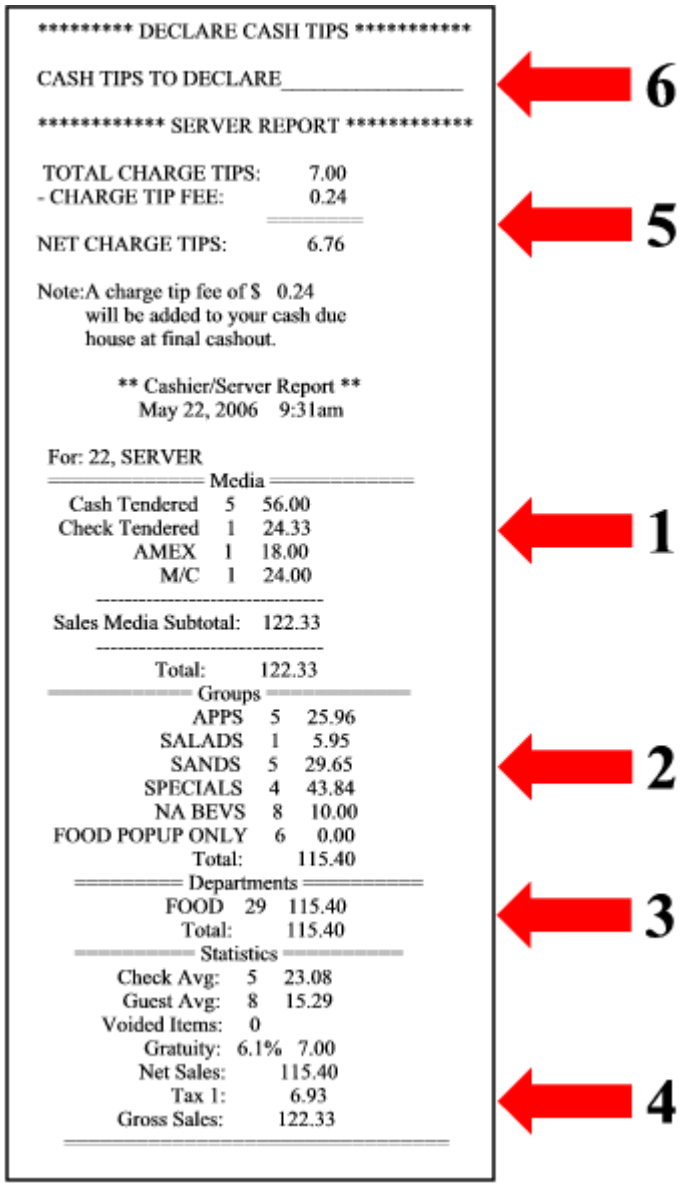


This will provide a total for all sales done to that point. Depending on system set up, it may also include a list of all the checks opened and closed for that shift. The list is a reference for each employee to keep organized.

8.1.1 How to Read and Understand Reports

Server Report

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The example above shows the "Server Report".

Section 1 is about money, or "Media", in other words how each check was closed and for how much. From the example it shows that the server "owes" the restaurant $56.00 in cash found on the "Cash Tendered" Line along with 2 credit cards, one each for American Express and MasterCard. The totals for the credit card includes any gratuity given to the server. The "Cash Tendered" is cash sales MINUS any credit card gratuities. Gratuities are automatically backed out of any cash due.

Section 2 and Section 3
This section is about menu entry quantities and amounts for each item. When programming each menu item, it is assigned a "Group" and "Department. For example, a cheesecake would be in the Department of "Food" and the Group of

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"Desserts". This is primarily used for owner tracking. It shows how many items of each category has sold, and by whom.

Section 4
This section is more information for either the owner or server. It is giving more information that an owner or server may use to verify how well that shift has performed.

Section 5
Section 5 may not be applicable to every restaurant. This section shows the Credit Card Gratuities with a percentage of the "Charge Tip Fee". This percentage is added into the "Cash Tendered" on the "Final Z". NOTE: Not all sites will have this feature used.

Section 6
This section is to claim CASH tips. By law, tipped employees must declare 100% of tips, cash and charge. The POS system knows the charge tips as they are entered by credit card. In this section, cash tips are declared for entry at a later time.

8.2 Credit Card Report

At the End of a shift a Credit Card Employee Report must be performed to check the credit card tips.

Enter employee number or swipe employee card



Press

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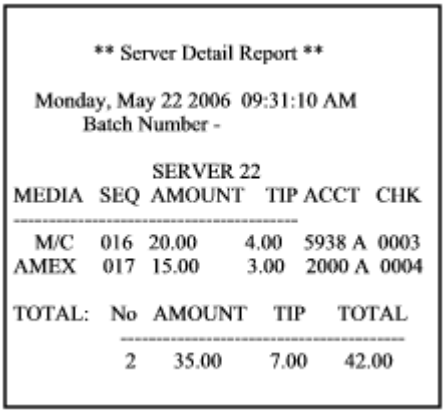


The report will print from the receipt printer.

Compare all credit cards and what has entered for tips during the day. Make sure these are correct with the merchant signature slips. Correct any tips on credit cards at this point. Refer to the "Tip Closed Check" Section

8.2.1 How to read Report and Understand Report

Credit Card Detail Report



** Server Detail Report **

Monday, May 22 2006 09:31:10 AM
Batch Number -

SERVER 22

MEDIA	SEQ	AMOUNT	TIP	ACCT	CHK
M/C	016	20.00	4.00	5938 A	0003
AMEX	017	15.00	3.00	2000 A	0004

TOTAL:	No	AMOUNT	TIP	TOTAL
	2	35.00	7.00	42.00

The information detailed on this reports is of credit cards only. It shows each card in Sequence with the check amount, tip, last 4 digits of the credit card number and check number. Compare each credit card to the actual signed "Merchant Copy" credit card slip. Voids will show as will with a "V" next to the account number instead of the "A" for authorized.

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** Merchant Copy **

Monday, May 22, 2006 09:30 AM

Type: AMEX Batch #: Chk: 4
Acct #: XXXXXXXXXXX2000 XX/XX
Auth #: 092552 Seq: 17 Table: 10
Serv #SERVER

Sale: $ 15.00
+Tip: $ 3.00
Total: $ 18.00

++Tip_____

Total_____

X_____
CARTLIDGE/R

I AGREE TO PAY ABOVE TOTAL AMOUNT
ACCORDING TO CARD ISSUER AGREEMENT

%	Tip	Total
15 % of sale:	$3.00 =	$18.00
18 % of sale:	$3.60 =	$18.60
20 % of sale:	$4.00 =	$19.00

If the tip is entered when the check is closed, the credit card report will be accurate, as will the Server Report. The tips are automatically deducted from the "Cash Tendered". This verification is very important. Always remember it is much easier to correct a tip prior to the "Final Z" then after.

8.3 Final Report "Z"

At the End of a shift a Final Z must be performed to end the sales journal for that shift.
This report shows totals for the shift and can only be produced after all checks are closed.

From the Start page

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Press "Other".



Press "Final Z".



A message will appear:



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Press Okay to continue.



Enter any CASH tips.



REMEMBER: This is used for IRS reporting purposes. There is no need to declare Credit Card Tips, as they are tracked automatically.

When asked if the tips entered is correct, press



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 or 

The Final Z Report will then print.

At this point, a "Clock Out" message may appear, depending on system set up.

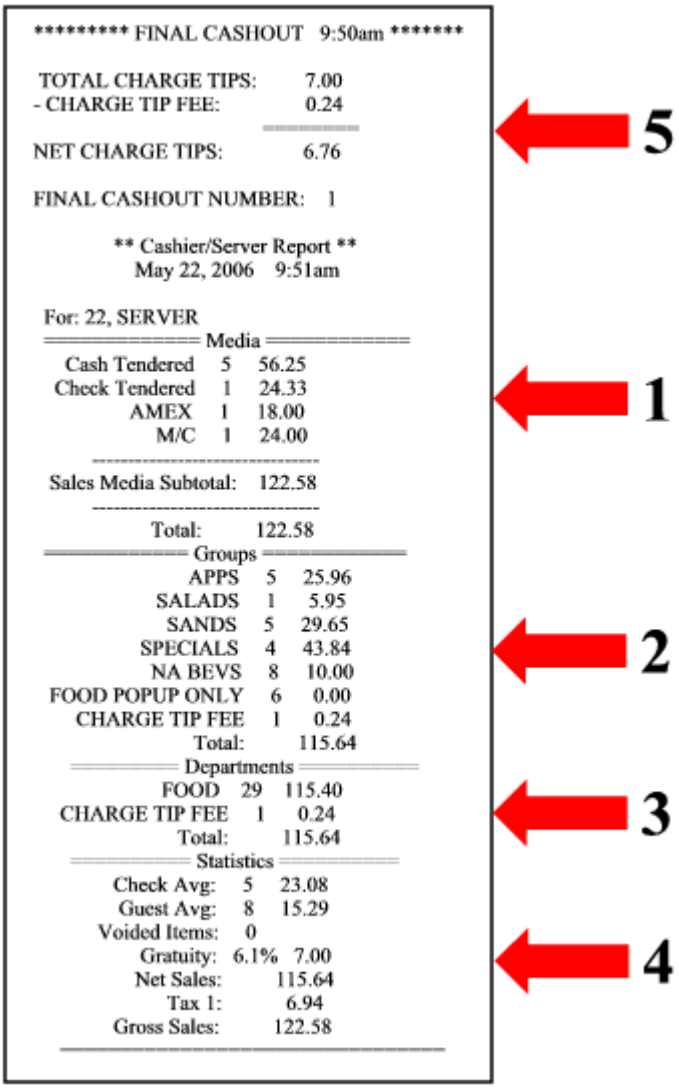


REMEMBER: Once the Final Z is run, all totals for that shift are reset and no changes to any check or credit card including tips, is allowed. Double check all totals prior to Final Z

8.3.1 How to read Report and Understand Report

This reports is very similar to the "Server Report".

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The examples above shows the "Final Cashout".

Section 1 is about money, or "Media", in other words how each check was closed and for how much. From the example it shows that the server "owes" the restaurant $56.25 in cash from the "Cash Tendered" Line. This amount includes "Charge Tip fee" if this feature is turned on (See POS Settings/ Media/ Credit Card", along with 2 credit cards, one each for American Express and MasterCard. The totals for the credit card includes any gratuity given to the server. The "Cash Tendered" is cash sales MINUS any credit card gratuities. Gratuities are automatically backed out of any cash due. On this report, any "Charge Tip Fees" are added into the "Cash Tendered" amount.

Section 2 and Section 3
This section is about menu entry quantities and amounts for each item. When programming each menu item, it is assigned a "Group" and "Department. For example, a cheesecake would be in the Department of "Food" and the Group of "Desserts". This is primarily used for owner tracking. It shows how many items of each category has sold, and by whom.

Section 4
This section is more information for either the owner or server. It is giving more information that an owner or server may use to verify how well that shift has performed.

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Section 5
Section 5 may not be applicable to every restaurant. This section shows the Credit Card Gratuities with a percentage of the "Charge Tip Fee". This percentage is added into the "Cash Tendered" on the "Final Z". NOTE: Not all site will have this feature used.

8.4 Declare Tips

Win-EZ allows for Declaring cash tips on Final Z out. An employee may also have the ability to "Declare Tips" prior to the Final Z.

From the Start Page



Press Other



Press "Declare Tips"



Enter dollar amount for CASH tips only

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REMEMBER: This is used for IRS reporting purposes.
There is no need to declare Credit Card Tips, as they are tracked automatically.

Tip Out
Tipping out a support person for IRS purposes can also be done at any time.

Press "Tip Outs"



Choose from the list of employees clocked in



Then enter the Amount

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EMPLOYEE TIP REPORT
An employee tip report provides tip and tip out information and prints to the receipt printer. This report is for informational purposes only.

REMEMBER: Only employees still clocked in will show on the list. If the employee to be tipped is not clocked in, on next shift both employees work a tip can be applied or at managers discretion, the clocked out employee can be clocked back in.

8.5 Clocking out

The manager at the end of each shift usually performs this function for servers and bartenders. Managers also perform a *Final Cash out* on each employee. If your restaurant allows you to sign out before a *Final Cash out* is performed the following must be done prior to leaving at the end of each shift

At the Start Page

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Touch the *Time* button



A window will appear that asks "Do you wish to clock out"



Touch "Okay" Button

The system will then ask for any cash tips to be declared.

If you have done this at "Final Z", declare $0.00, otherwise declare cash tips.

REMEMBER: This is used for IRS reporting purposes.

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There is no need to declare Credit Card Tips, as they are tracked automatically.

READ the e-mail sent by the manager then touch the "X" or print any e-mail

8.6 E-Mail

E-Mail is a function the management creates for each job code, certain employees or for all employee. This information is important to all jobs duties. There are two ways to retrieve E-mail from Managers.

At Clock in/ Clock out. The message will appear.



Print the message or cancel AFTER the message is read.

On "Other" Page

From the Start Screen

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Press "Other".



The Left side of the "Other" page is e-mail information.



NOTE: If forced e-mail is turned on, employees will be forced to read the e-mail each time they clock in and out. If it is turned off employees will only receive it when a new e-mail is sent.

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Part



9 Other Functions-Server

Win-EZ has been designed in such a way that every job code has its own other functions page. The other functions page houses functions that are needed outside of a check. By placing only the commands needed for that job code the system will be much easier to maintain and learn for new employees. This will take a little longer to set up but will pay for itself ten fold in the future.

Others Function are features and functions that do NOT pertain to an *OPEN* guest check. They include features such as Reporting functions, Tip Outs, Adjusting Closed Credit Card Tips, Viewing schedules and much more.

The following are items usually associated with Servers, Bartenders and Cashiers. Not every job will have the same features as they are determined by the system set up.

The main "Other Function" features have been described in different sections such as Final Z and Server Reports.

Below is an example of a common Server Other page



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9.1 Adjusting Credit Card Tip after Close

At Start Screen

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Press "Other" Button



Press "CC Tip Closed"



Locate the incorrect card by Check Number, Table Number, or Amount

Highlight the incorrect card



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Press "Okay"

If there is more than one credit card, choose the credit card that is incorrect



Enter in the correct tip amount and press "okay". A corrected tip receipt will print.

9.2 View Untipped Credit Cards

This feature can either be a manager function or an employee function, depending on set up. It lists all credit cards without tips entered, before or after close. It is a report that helps with correcting any credit cards prior to Final- Z.

At Start Screen

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Press "Other" Button



Press



A screen showing all credit cards with out tips will be displayed



Adjust any cards needed.

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9.3 Employee "Cheat Sheets"

Employee "Cheat Sheets" are this manual in a smaller, condensed version with no pictures or explanations.

It LISTS the key strokes for certain job duties such as Opening a new check, Closing Checks, Printing Checks, Voiding an item (for managers), Producing Reports and much more.

To review or print the "Cheat Sheets"

At Start Screen



Press "Other"



Press "Emp Help".

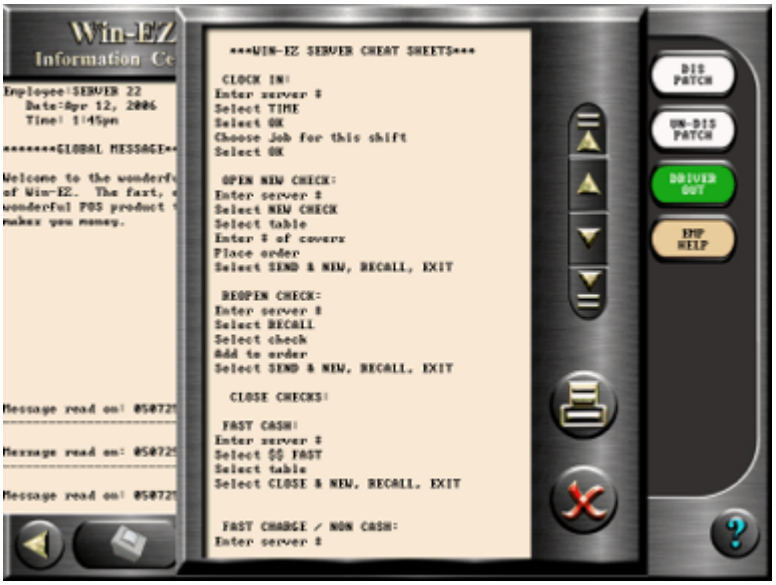


Choose the topic to be reviewed or printed.

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Read or print the topic.



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9.4 Print Schedules

Within Manager, scheduling can be input with staff having the ability to print Current Schedule or Next Week's schedule.

To Print Schedules
Enter Employee Number or swipe employee card

Press "Other"



Press "Current" or "Next Wk"



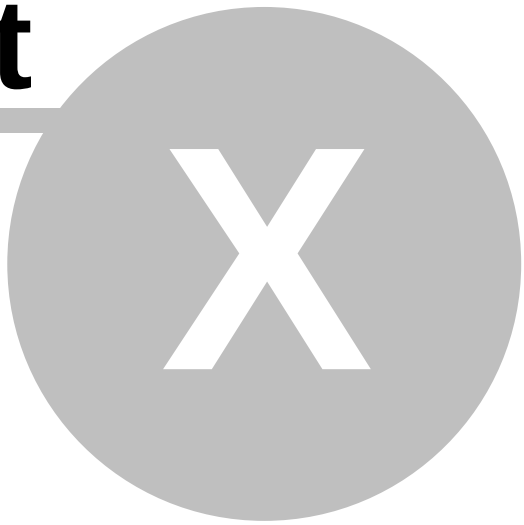
The schedule will display on the screen, and the employee can print the schedule.

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Part



10 Other Functions-Manager

Win-EZ has been designed in such a way that every job code has its own specific "Other" functions page. The Other functions page houses functions that are needed outside of a check. By placing only the commands needed for that job code the system will be much easier to maintain and learn for new employees. This will take a little longer to set up but will pay for itself ten fold in the future.

Others Function are features and functions NOT pertaining to an *OPEN* guest check. They include features such as Reporting functions, Tip Outs, Adjusting Closed Credit Card Tips, Viewing schedules and much more.

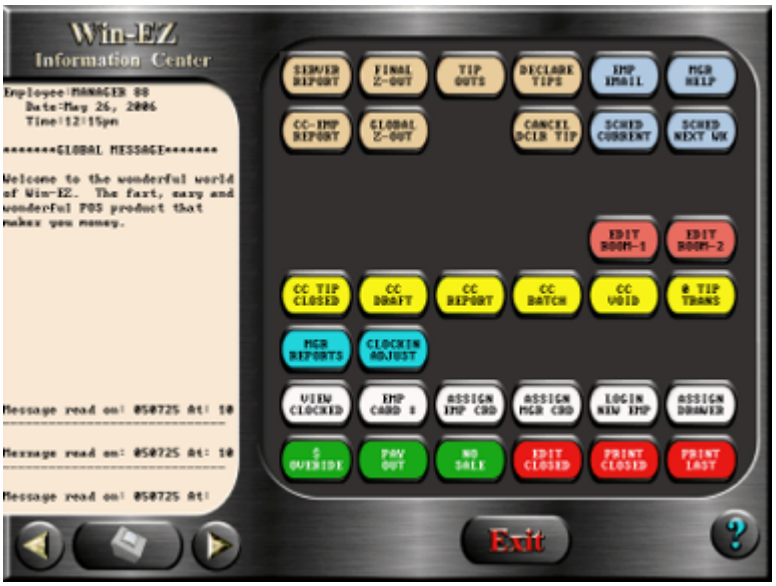
The following are items usually associated with Managers. Not every job will have the same features as they are determined by the system set up. Different levels of Managers can be added to give each a different level of security

The main "Other Function" features have been described in different sections such as Final Z and Server Reports.

Below is an example of a common Manager's Other page



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10.1 Manager Reports

To give minute by minute detail of sales and labor information from the floor, managers have the ability to use "Manager Reports". These can be accessed two ways.

The first is from the "Start" Screen.
Press "Reports"



Three options are given: All Open Table, Old Open Table, or Manager Reports

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"All Open Tables" shows a list of all tables opened, for how long, which table number, employee and dollar amount on the check.



In POS Settings, set up of what is considered "Old Tables" can be set. If a table turn of 90 minutes is normal, "Old Open Tables" will display the list of tables open longer than 90 minutes. The report is displayed like the above, but with only "Old" tables listed.

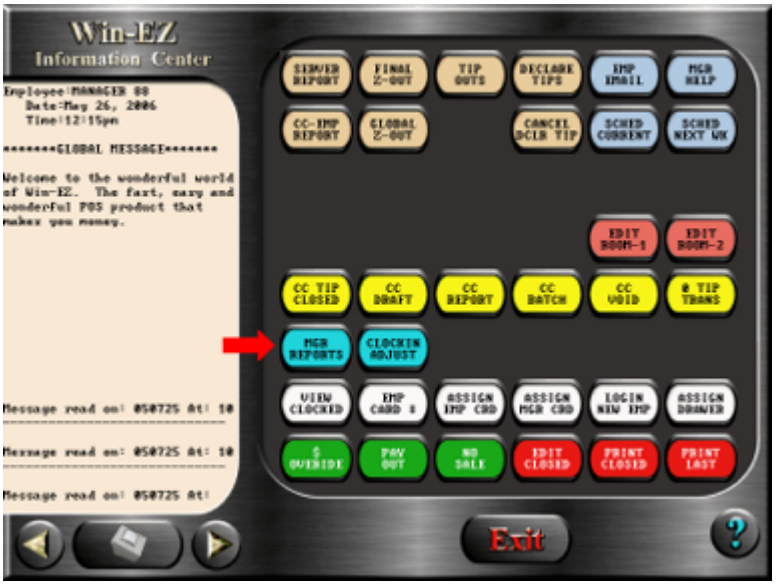
Manager Reports give a few options such as type of report, for which day and time period.

NOTE: This report shows sales details WITHOUT tax, so reports do differ between the front reports and what is seen in the Back of the House reporting engine.

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The second way to access Manager Reports is if a button is programmed on the "Other Page"



The same report screen will be displayed.

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10.2 Re Open Closed Check

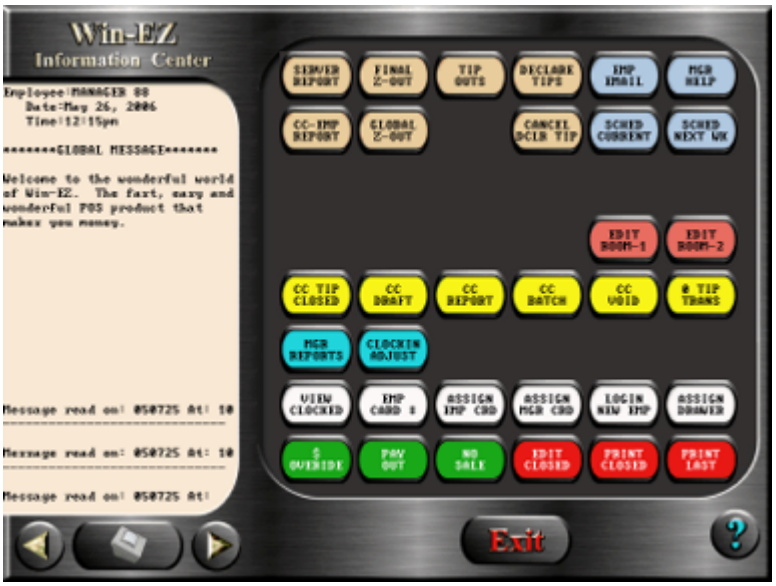
Because there are few reasons to open a closed check, this feature is used most often because the wrong check was closed. If a server closes Table 12 when 11 should have been, reopening a closed check is the way to retrieve the check.

NOTE: If the wrong check was closed with a credit card, after reopening the check the credit card would need to be voided.

REMEMBER: The credit card numbers are not visible from the Merchant copy and can only be found from Win-EZ Credit Card Report PRIOR to any batching.

On "Other Page"

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Choose



Choose the employee whose check needs to be re opened by highlighting.



A list of all closed checks for that employee will show.

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Highlight the check that needs to be reopened. The check will be displayed to verify this is the correct check.



Press



If this is the correct check to reopen.

The check is then opened.

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NOTE: This is considered an "Over ring" in Closed Check Report from Manager. On each over ring 3 checks with different check numbers will be listed. The first is the original check number, second is the exact check but with negative amounts to offset the first, then the check it is now. On Recall Check button, it will show "ADJ" as the table number.



10.3 Final Z-Out

At the End of a shift a Final Z must be performed to end the sales journal for that shift on that employee. This report shows totals for the shift and can only be produced after all checks are closed.

From the Start page



Press "Other"



Press "Final Z"

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A message will appear:



Press "Okay" to continue



Enter any CASH tips.



REMEMBER: This is used for IRS reporting purposes.

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There is no need to declare Credit Card Tips, as they are tracked automatically.

When asked if the tips entered is correct, press



 **or** 

The Final Z Report will then print.

At this point, a "Clock Out" message may appear, depending on system set up.

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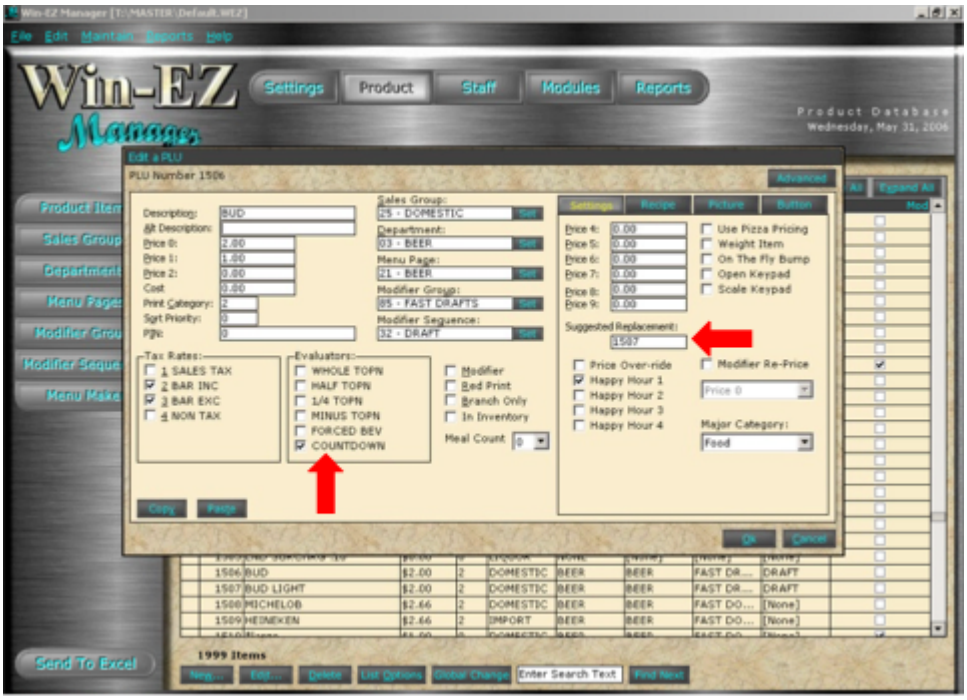
REMEMBER: Once the Final Z is run, all totals for that shift are reset and no changes to any check or credit card including tips, is allowed. Double check all totals prior to Final Z

10.4 86'd Functions

There are times in every restaurant when things run out of stock or is 86'd. This feature allows managers to do a countdown of the items or "86" them all together. When the item is on a countdown and runs out, the system does not allow that item to be ordered. This feature helps eliminate wasted management time voiding item after item from employee's checks.

The following is an example of an item from the Product Database and set up of "Countdown" and "Suggested Replacement"

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Each item that is needed on the "Countdown" list, the evaluator must be checked

A "Suggested Replacement" can be entered into the Product Database that will recommend a like item using the Product Item Number in this field.

When the item is out of stock with a "Suggested Replacement, a window will appear when the item is out of stock showing the like item.

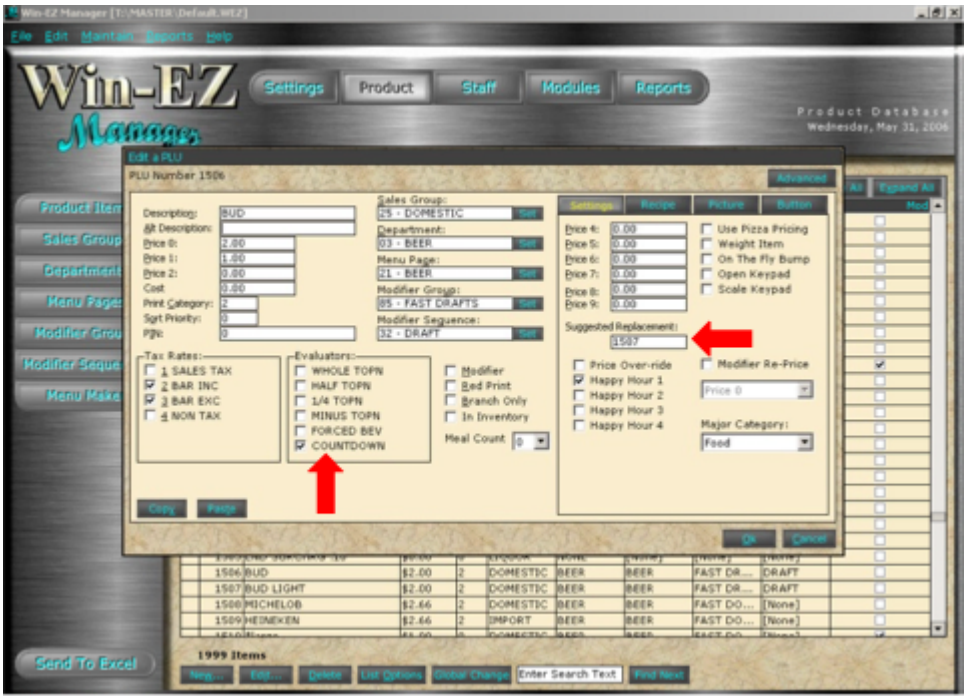


10.4.1 Activate

This feature allows a manager to set up a countdown for items that may be getting low ,so as the items are ordered it will take one away from the number assigned. When the item is out of stock the button will still be there but a server will no longer be able to order that item.

To Edit an item, first "Countdown" must be checked in the Product Database in Win-EZ Manager.

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To Activate a new item, a new check must be opened, with a managers number.
Go to "Other" from Start Screen



Press



A list of all items that were "Countdown" enabled will show.

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Highlight the item that is out of stock, or low on stock.



Press Okay

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Enter on the keypad the quantity on hand or that is out of stock.



To view a list of "Active/ On hand" Press



A "Suggested Replacement" can be entered into the Product Database that will recommend a like item.

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10.4.2 Edit

This will allow managers or chefs to view and change the amount on hand for all active menu items. Items can also be deactivated from here. By selecting an item a window will pop up to enter the new amount on hand. Entering 999 will deactivate the item. Selecting cancel will leave the original amount entered.

To Edit an item, a new check must be opened, with a managers number.

Go to "Master Control"



Choose "86 Edit"



A list of all Active items with a countdown amount will display



To "Edit" the amount on hand, Highlight the item.

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Press "Okay"



The window to enter the amount on hand will appear.



Items can also be deactivated from here. Entering 999 will deactivate the item. Selecting "Cancel" will leave the original amount entered.

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10.4.3 Delete Active Item

This will allow you to remove a single item from the countdown list that is no longer on a countdown.

To Delete an Active item, a new check must be opened, with a managers number.

Go to "Master Control"



Choose



Highlight the item that no longer is on a countdown



Press "Okay"



This removes it from the list of "Active/ On Hand" items.

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10.4.4 Delete Active All

This will delete all items on the countdown list.

To Delete All Active items, a new check must be opened, with a managers number.

Go to "Master Control"



Choose



A message will confirm this function

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Press "Okay" to clear the list or "Cancel to keep list active

If okay is chosen, the list will then be empty.



10.4.5 View 86's List

Once the "86'd" edit and activation is complete, employees can view or print the list with the number of items.

From the "Start" Page Press "86'd"

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The list of all items on a countdown will be listed



The list can be viewed or printed by pressing



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10.5 Global Z-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. This feature replaces "Final Z-out" for each employee.

NOTE: A Final Z-Out report DOES NOT print, so doing a "Server Report" prior to "Global Z-Out" will give a report for each employee if statistical tracking is needed.

From "Other" Screen



Choose "Global Z-Out"



The system will confirm this is what is to be done.



Press



It will then ask if the manager performing "Global Z" wishes to be clocked out.



Enter any cash tips

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A confirmation receipt will print showing which employees were Z'ed out.

10.6 Credit Card Functions

The following section is regarding other functions with Credit Cards. These functions work in conjunction with "Other" Function page and set up. If CC Draft function button is placed on a servers "Other" page, they can reprint a draft. If CC Void is programmed in POS Settings/ Media to allow servers to void a credit card, the button should be added to the server "Other Page"

10.6.1 CC Batch/Report

This report is similar to the Server's " CC-EMP Report" but it provides information for all employees. There are two reports that provide the same information but in different formats. The "CC Batch" lists all credit card in sequential order, but the "CC Report" lists credit cards by employee then sequential order.

From "Other" Page

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Press



For the following Report.

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** Batch Detail Report **

Tuesday, May 30 2006 04:15:22 PM
Batch Number - 150001

MEDIA	SEQ	AMOUNT	TIP	ACCT	CHK
M/C	001	5.00	0.00	5938 A	0055
M/C	002	5.00	0.00	5492 A	0055
M/C	178	10.00	5.00	5938 A	0005
M/C	180	20.00	10.00	5938 A	0008
M/C	182	20.00	10.00	5938 A	0011
M/C	184	40.00	0.00	5492 A	0029
Cash Te	186	9.00	0.00	5492 A	1956
Cash Te	187	9.00	0.00	2000 A	1959
Cash Te	191	9.00	0.00	2000 A	1964
Cash Te	192	9.00	0.00	2000 A	1965

Transactions:

M/C		6100.00	25.00	125.00
Cash Tende	4	36.00	0.00	36.00

-Voids:

+Credits:

Sub Totals:

M/C	6	100.00	25.00	125.00
Cash Tende	4	36.00	0.00	36.00

TOTAL:	No	AMOUNT	TIP	TOTAL
	10	136.00	25.00	161.00

OR



For the following report

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** Server Detail Report **

Tuesday, May 30 2006 04:15:20 PM
Batch Number - 150001

<22>

MEDIA	SEQ	AMOUNT	TIP	ACCT	CHK
M/C	001	5.00	0.00	5938 A	0055
M/C	002	5.00	0.00	5492 A	0055
Cash Te	186	9.00	0.00	5492 A	1956
Cash Te	187	9.00	0.00	2000 A	1959
Cash Te	191	9.00	0.00	2000 A	1964
Cash Te	192	9.00	0.00	2000 A	1965

TOTAL:	No	AMOUNT	TIP	TOTAL
	6	46.00	0.00	46.00

<311>

MEDIA	SEQ	AMOUNT	TIP	ACCT	CHK
M/C	178	10.00	5.00	5938 A	0005

TOTAL:	No	AMOUNT	TIP	TOTAL
	1	10.00	5.00	15.00

<700>

MEDIA	SEQ	AMOUNT	TIP	ACCT	CHK
M/C	180	20.00	10.00	5938 A	0008
M/C	182	20.00	10.00	5938 A	0011

TOTAL:	No	AMOUNT	TIP	TOTAL
	2	40.00	20.00	60.00

<88>

MEDIA	SEQ	AMOUNT	TIP	ACCT	CHK
M/C	184	40.00	0.00	5492 A	0029

TOTAL:	No	AMOUNT	TIP	TOTAL
	1	40.00	0.00	40.00

REMEMBER: This is for reporting purposed only. CC Batch will not batch credit cards. Batching credit cards is only done in Win-EZ Credit Card software.

10.6.2 CC Void

This feature is for voiding a credit card that was entered onto the wrong check. Once the credit card is "voided", the credit card information can be found in Win-EZ Credit Card at the Managers station. This feature can be set so servers or bartenders can perform this function. The button below is on the Media page.



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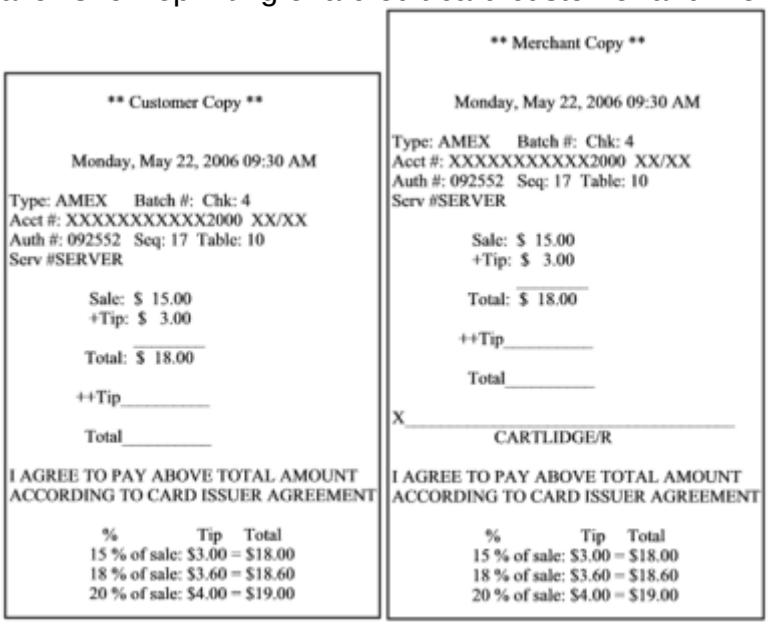
If servers and bartenders are not allowed this function the above button, while still being displayed, will not do anything if pressed.

If this is a Manager only function, adding the button to the Manager's "Other" page will allow voiding of a credit card.

REMEMBER: If the credit card is "Voided", the credit card information can be retrieved only in Win-EZ Credit Card PRIOR to batching.

10.6.3 CC Draft

This function allows for reprinting of a credit card customer and merchant copy



** Customer Copy **

Monday, May 22, 2006 09:30 AM

Type: AMEX Batch #: Chk: 4
Acct #: XXXXXXXXXXX2000 XX/XX
Auth #: 092552 Seq: 17 Table: 10
Serv #SERVER

Sale: $ 15.00
+Tip: $ 3.00
Total: $ 18.00

++Tip_____

Total_____

I AGREE TO PAY ABOVE TOTAL AMOUNT
ACCORDING TO CARD ISSUER AGREEMENT

%	Tip	Total
15 % of sale:	$3.00 =	$18.00
18 % of sale:	$3.60 =	$18.60
20 % of sale:	$4.00 =	$19.00

** Merchant Copy **

Monday, May 22, 2006 09:30 AM

Type: AMEX Batch #: Chk: 4
Acct #: XXXXXXXXXXX2000 XX/XX
Auth #: 092552 Seq: 17 Table: 10
Serv #SERVER

Sale: $ 15.00
+Tip: $ 3.00
Total: $ 18.00

++Tip_____

Total_____

X_____
CARTLIDGE/R

I AGREE TO PAY ABOVE TOTAL AMOUNT
ACCORDING TO CARD ISSUER AGREEMENT

%	Tip	Total
15 % of sale:	$3.00 =	$18.00
18 % of sale:	$3.60 =	$18.60
20 % of sale:	$4.00 =	$19.00

This feature can be either a manager function or a server function.

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From the "Other" page



Press "CC Draft"



Enter the Check Number for the credit card to be reprinted



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10.6.4 View Untipped Credit Cards

This feature can either be a manager function or an employee function, depending on set up. It lists all credit cards without tips entered, before or after close. It is a report that helps with correcting any credit cards prior to Final- Z.

At Start Screen



Press "Other" Button



Press



A screen showing all credit cards with out tips will be displayed.

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Adjust any cards needed.

10.7 Assigning Security Cards

For added security, cards can be used in place or in addition to a number for employees and managers.

10.7.1 Manager

Managers have 2 levels of security for most "Manager" function, the employee number and "Passcode". Both numbers are entered in Win-EZ Manager (Staff-Employee List and Settings-Passcode). The system can also be configured to only allow manager cards to be used, eliminating the number entry altogether. (Settings-Global-Security).

To assign a managers card they first need to be clocked in.
On "Other" Page

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Choose "Assign MGR CRD"



A list of all employees will be displayed, highlight the employee the card is to be assigned to.

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A prompt to "Swipe Your Security Card" will show, swipe the card.



A receipt will print with employee and card number to verify.

The card can now be used in place of employee number

NOTE: Through out the system, the procedure has been "Enter employee number, select function (New check, Other, Manager Reports, Adjust check) but if cards are used the procedure is reversed. From the "Win-EZ" Page: Choose the function that is going to be done THEN swipe the card.

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10.7.2 Employee

The procedure to assign an Employee Card is the same as the manager. Employees can use either the employee number assigned or the card. Unlike the manager card, the system does not allow number blocking for employees.

To assign an employee card they first need to be clocked in.
On "Other" Page



Choose "Assign EMP CRD"



A list of all employees will be displayed, highlight the employee the card is to be assigned to.

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At the prompt to "Swipe Your Security Card", swipe the card.



A receipt will print with employee and card number to verify.

The card can now be used in place of employee number

10.7.3 Query Server Card

This feature allows a user to swipe a server or manager card to obtain the number.

On "Other" Page

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Choose "Emp Card #"



Swipe the card to find the number

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The system will allow multiple cards to be swiped and a receipt will print with the cards swiped.

10.8 Assigning Cash Drawer

To using multiple cash drawers with a single terminal, assigning an employee to a certain drawer will add security. Only the assigned drawer will open when the media or No Sale is used.

To assign a Cash Drawer, from "Other" Page



Press

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A list of all employees will show, Highlight the employee to be assigned a drawer



Select which cash drawer to be assigned to that employee



Press

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A receipt will print to show which drawer the employee has been assigned to

NOTE: To reassign the drawer to a different employee, simply repeat the process. The system will automatically change to the new employee.

10.9 Print Closed

This feature allows multiple query, sorting and printing options for **closed** checks.

From "Other" Page



Choose "Print Closed



Sort by Person, Phone Order, Dollar Amount, Time, Check, Date and much more.

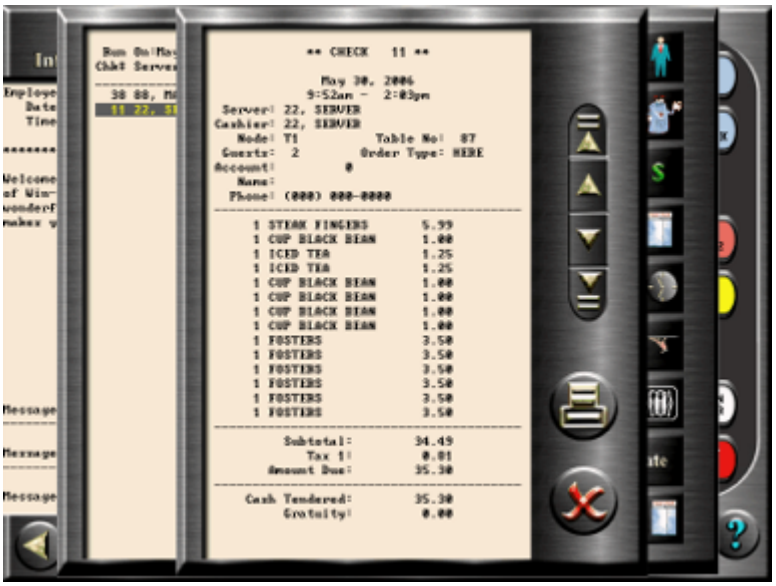
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Press " Retrieve Check"



The highlighted, "retrieved" check will be displayed



If this is the correct check, either view or print by pressing print.

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Press "Cancel" when finished



10.10 Start New Employee Check

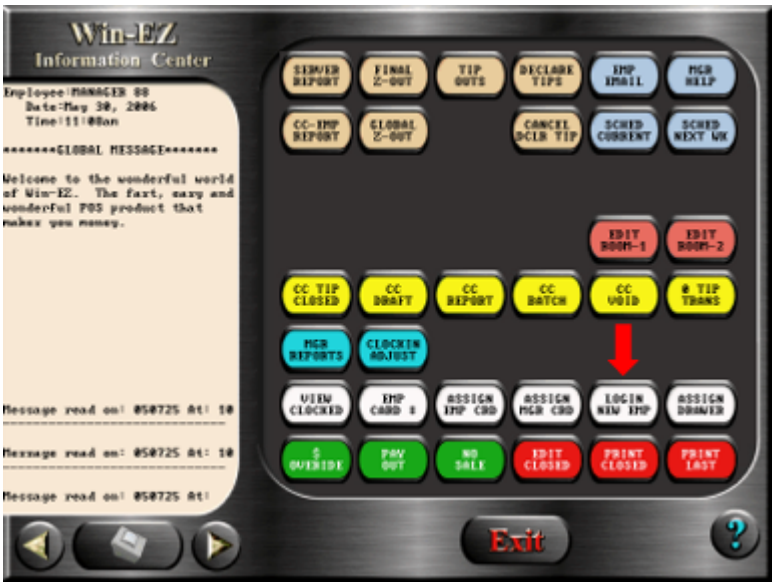
This allows a manager to start a new check for an employee with employee number if the employee is unavailable to do so themselves.

From "Other" Screen



Choose " Login New Emp"

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A list of clocked in employees will be displayed



Highlight which employee the manager is starting a table for and continue with the new order process, starting with choosing a table.

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10.11 View Clocked Employees

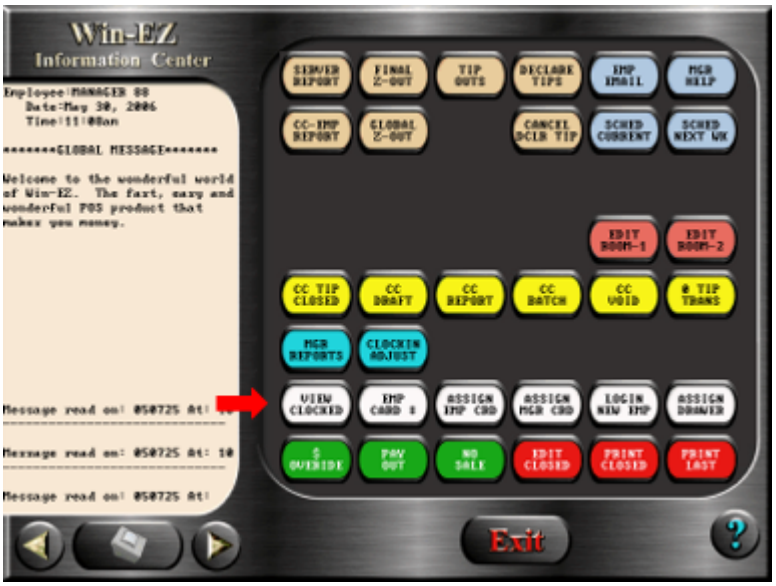
This feature will list all employees, with their numbers that are clocked in at the time. This information can be viewed or printed.

From "Other" Screen



Choose "View Clocked"

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A list of all employees will be displayed



To Print this list, press the  button.

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10.12 Clock In Adjust

This function adjusts the clock in time of an employee. If the clock in is adjusted the current and new clock in time will print automatically.

This function is in "Other".



Choose "Clock In Adjust"



A list of all clocked in employees will show

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Highlight which employee is to be adjusted.

Correct the clock in time.



10.13 Pay Outs

Payouts are a way for cash to be deducted from the Total Cash at the end of the day. This is similar to a petty cash control system. If payouts are routine, adding the button to a bartender or cashier screen is the best way to control cash flow. Payouts are listed as another media, such as cash or check.

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On the "Other Page"



Choose



Enter the amount needed to be "paid out".



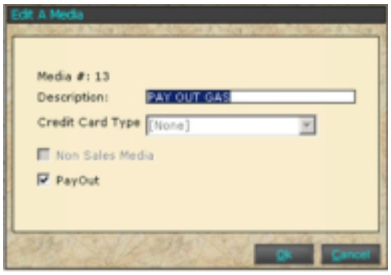
Next choose WHY the payout is happening.

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A receipt will print for added security.

Set up for Payout Reasons is in Win-EZ manager, Settings, Media. Choose an empty media, name the payout reason, check "Payout" and it is added to the list of Pay out reasons.



10.14 Price Override

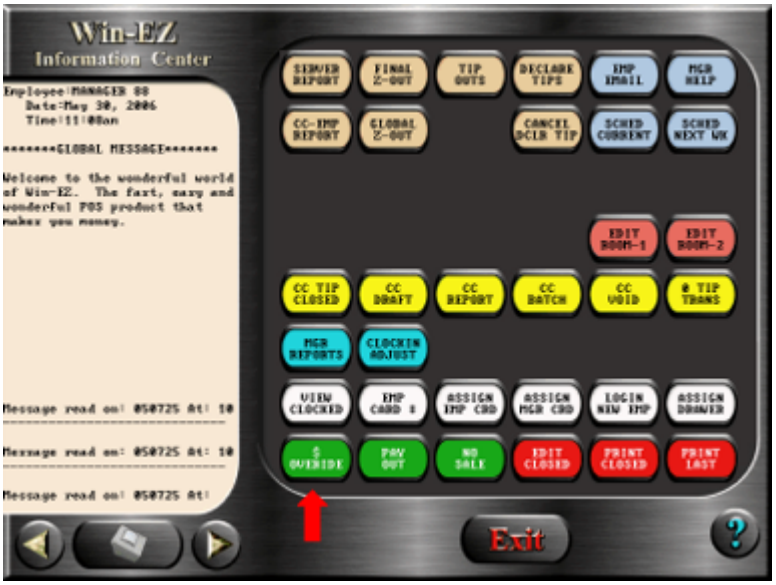
Price override is used if there is a special function, or if happy hour is going to be extended for any reason. This feature works by terminal. Set up also needs to be done in Win-EZ Manager, similar to Happy Hour set up. Check "Price Override" in the Product Database.

On Other Page

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Press "$ Override"



Choose what price level is needed on this terminal.

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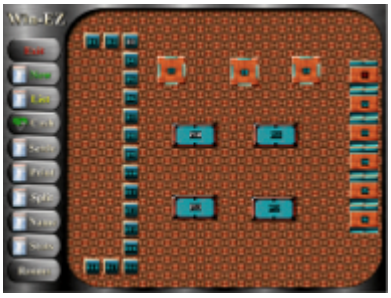


REMEMBER: The "$ Override" will continue to be the Price level by terminal until it is turned "Off", then the terminal will go to normal pricing, happy hour price levels.

10.15 Edit Room 1-4

To change the look and layout of tables for servers, use Edit Room 1, 2, 3 or 4 depending on how many "rooms" there are in the restaurant. Rooms would consist of cocktail lounge, main dining room, upstairs, downstairs etc. Each job code or terminal can be set to "start" at a different room, cocktailers see the cocktail lounge while servers see main dining room. On the "Choose a table" option, a server can also change a room.





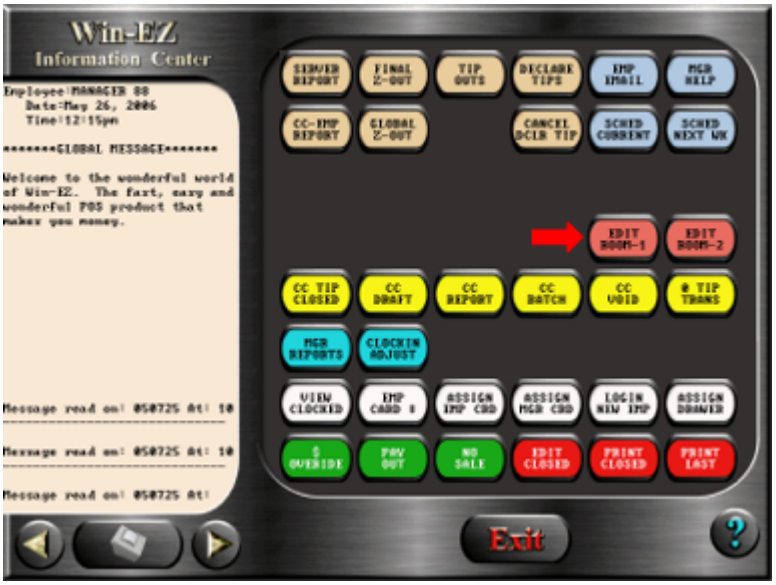
To Edit a room
Enter Manager Number or swipe card

Press Other and Enter Password

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Choose which room to edit.



The table layout will be displayed, along with the options of changes that can be made.

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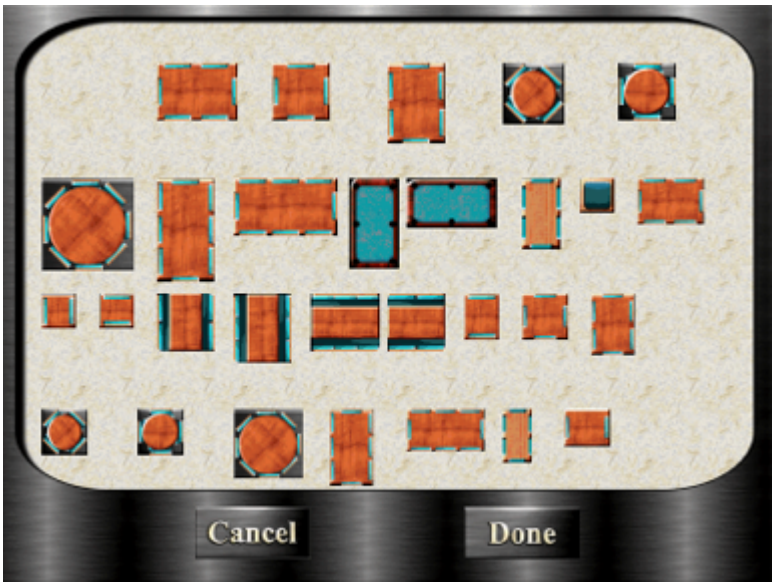
To change the background Press "Background" and the choices will be displayed.



Choose the background that best suits the restaurant.

To Add a table Press "+Table" and choose which table shape best suits the table being added.

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By Pressing "Done" the table chosen will be added to the middle of the room.

HINT: Change the name of the table next. This will help with placement of table. When using "Table Edit", the table that is being added, moved or renamed should be YELLOW while all the other tables should be BLUE. Changing the added table's name will help when relocating the table.

Press "Name" and a keyboard will show.



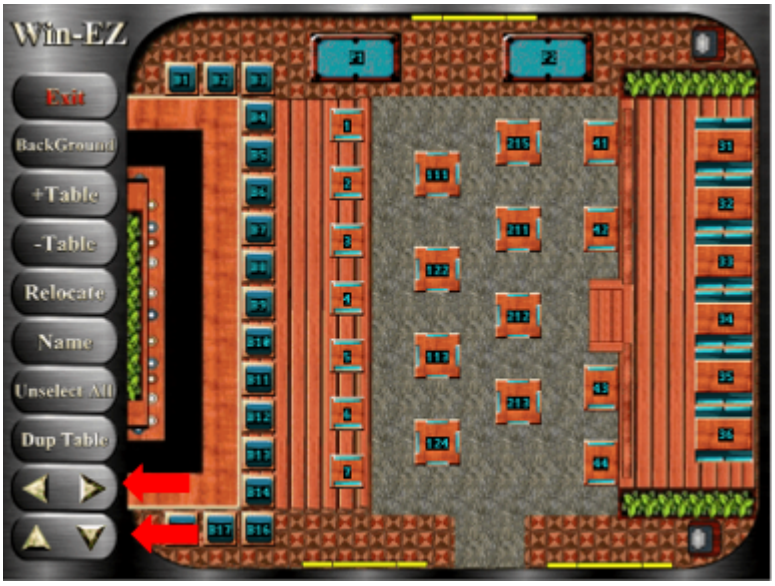
REMEMBER: Tables can only be 3 characters long, Alpha or numeric

To "Relocate" a table to it's proper position on the screen, Press to make it "YELLOW" and make sure all other tables are "BLUE". Press "Relocate"

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And touch the screen where the table belongs. Spacing may be off by a position or two, but using the Up/Down-Right/Left arrows, the table can be repositioned.



Repeat this process for all "Rooms".

HINT: Select all the tables, making them YELLOW and "-Table". This will remove all the tables, then "+Table" to add the correct table for a new room.

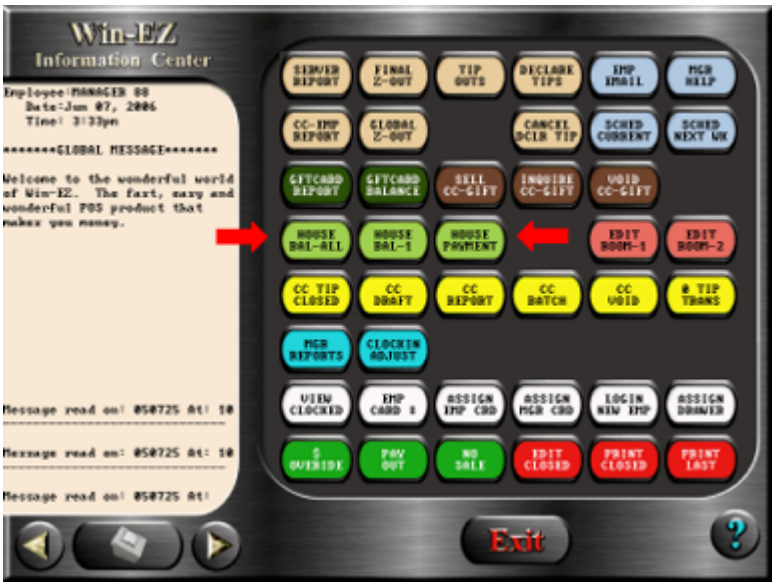
10.16 House Accounts

While "House Account" is a Media, the house account list must be maintained. House Accounts are generally used for regular customers or for customers that need to be billed later.

House Account set up is done in the office computer, but checking balances or applying payments can be done from a terminal.

The House account features are on the "Other Page"

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There are three functions for House Account maintenance: All Balances, Single Account Balance or House Account Payment.

All Balances
This function prints list of all House Accounts with either a positive or negative balance (+/-). No zero balance house accounts will print.

Press



A receipt will print showing all House Accounts with the amount owed.

Single Account Balance
This feature will allow a manager to print house account balance on one account only.

Press

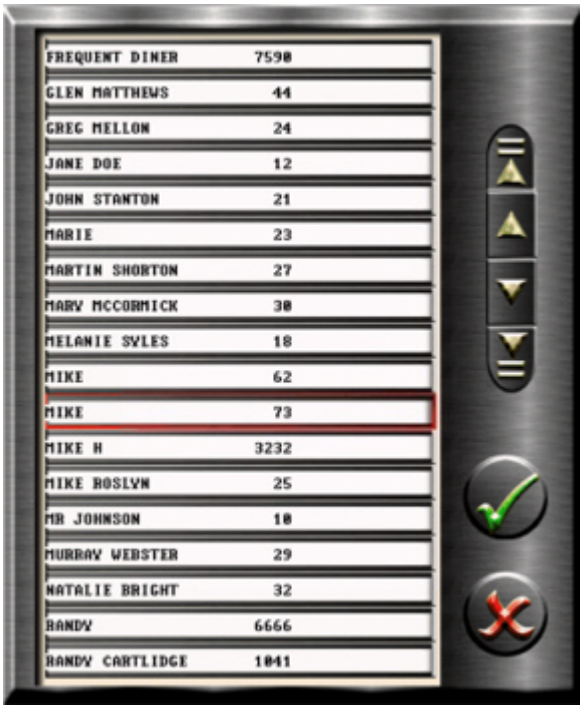


Find the account for balance inquiry either by the "List A-Z", "List #" or enter the account number.

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If lookup is done by "List A-Z" or "List #", a list will display to find the account.



Highlight the account and press



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After the account is found, a receipt will print with just one balance.

Apply Payment
This function allows managers to apply payment to a house account.
Press



Find the account that needs payment applied

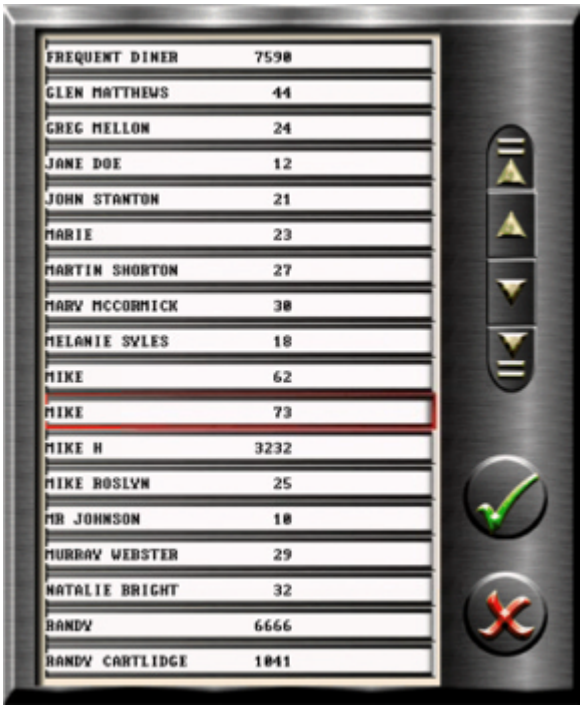


Find the account for balance inquiry either by the "List A-Z", "List #" or enter the account number

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If lookup is done by "List A-Z" or "List #", a list will display to find the account.



Highlight the account and press



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Enter the amount of the payment.

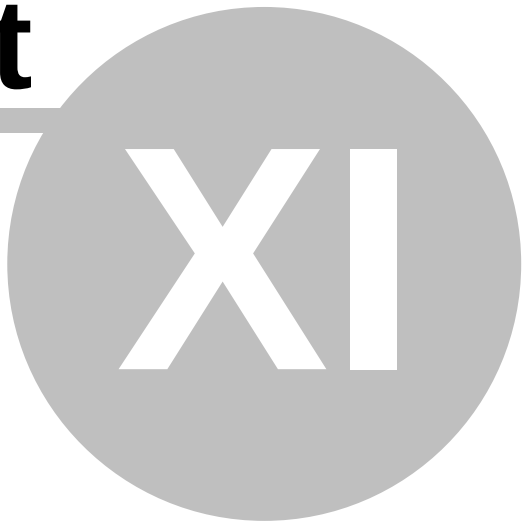


A receipt will print with applied money and balance on the account

Remember: Once payment is applied, a "Server Report" and "Final Z-Out" will have to
be run as the money applied is on the manager's sales journal.

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Part



11 Manager Functions

Every restaurant has exceptions and for exceptions that effect revenue there are Manager's functions". The Win-EZ System provides many ways to achieve happy customers. Take time and look thru this section to see what functions are included. Please note that just because the have historically been restricted to managers the Win-EZ System will allow that they be assigned to non-management personnel if the owner wishes.

The following screen shows an example of a typical "Manager Master Control" Page.



11.1 Removing items from a Guest Check

While every restaurant functions differently, every restaurant has different "house" rules for removing items from a check. In the section titled " Voids, Comps, Discounts Settings" explains HOW to set up each type, this section explains the procedure of use. The basic procedure on how to remove items is the same, regardless of the type.

The following screen shows all the TYPES of Voids, Comps, Discounts and Coupons.

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REMEMBER: COMPS, DISCOUNTS, VOIDS AND COUPONS MUST BE DONE AFTER SPLIT CHECK FUNCTION IS PERFORMED.

11.1.1 Comps

After an employee "Sends" items to the kitchen or the bar to be made, it is usually a manager's job to remove the item. The following procedure is for "Comps". The procedure is the same for Voids, Discounts and Coupons. The function keys are on the Manager's Master Control Page.

There are many ways to access the Manager's "Master Control" Page.

If the employee has the check open, and "Log In/Log Back feature is set up, a manager can go from a server's "Master Control" page to the "Manager's Master Control Page" and back, as explained in the next subsection.

If the server does not have the check open, a Manager can use their manager number using the "Recall" button to access the check. The Manager then needs to go through the "Master Control" function to go to the Comp functions.

If the server does not have the check open, a Manager can use their number or swipe the manager card to "Adjust" button on the "Start" Screen. This is the fastest way to access any check for "Adjustments"

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Choose the check that needs to be adjusted



Enter Passcode

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The Manager's "Master Control" page will be the next screen. It shows the items ordered and all the Manager functions.



To "Comp" an item for a percentage comp or dollar value off, Highlight the item.

Press



for Dollar Comp Item

Or

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for Percentage Comp Item

Enter the Dollar Amount or Percentage that needs to be removed.





Next give the reason for the "Comp" from the list of reasons



A "Comp" receipt will print with the adjustment reasons. The receipt acts like a credit card receipt. There is a space for more information, and signatures for security purposes. On the "Media" section of Server Reports and Final Z Reports will show a line item of "Manager Adjust", totaled for all Manager Adjustments made that shift. The check will show the following.

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11.1.1.1 Clear Comps

To clear a Comp, the procedure is the same as when the adjustment was made.

While in the check, press



The next window will ask for the reason to Clear the Comp. Usually the same reason to add a comp is the reason to clear the comp, so they offset each other

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Choose the reason from the list and the comp is removed.



11.1.2 Voids

Voids work in the same manner as "Comps" with a different list of reasons for a void. Voids are removed from the check, do not show as a "Media" on reports and are considered a non sale. Voids are usually used when the item is out of stock or too many items were rung on the check by accident.

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If the server does not have the check open, a Manager can use their number and the "Adjust" button on the "Start" Screen. This is the fastest way to access any check for "Adjustments"



Choose the check that needs to be adjusted



On the Manager Master Control, highlight the item that needs to be voided off and Press



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Choose the Void Reason.



The screen will still show the item listed but with *Void* in place of the monetary value.



Usually, only one item is Voided at a time, but there are instances that the whole check would need to be Voided.

Press



To Void all the items off the check. The check is still open, and would need to be

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"Closed".

11.2 Re-Fire Orders

Although Win-EZ Printing has redundant backup so no orders are lost to the kitchen or bar, there will be times an order needs to be "Re Fired" to be made. This is usually a manager function for security purposes.

While in the order is open, continue to "Manager Master Control" page



NOTE: The order will re-send to the kitchen and bar. It will be plainly marked as a
*******REPRINT***** in red print and contain the name of the employee who did the refire.**

11.3 Log In Adjust/ Log Back

This feature was designed to make manager adjustments easier. Within a server's open check, a manager can "Log In" to make adjustments such as voids and comps without having to exit the check. After the adjustment is made, a manager can "Log Back" to give control of the check back to a server. This feature is password protected for added security.

From the Servers "Master Control" Control Page

Press "Mgr Login"

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For security purposes Enter Manager Number or swipe Manager Card



Followed by Manager Password

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After password security is entered, the Manager "Master Control" page will appear.

Make any necessary changes to the check.



After adjustments are made, Press



to log off as a manger and give control of the check back to the server.

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11.4 Tax Exempt

This feature removes the tax from the check. Tax Exempt function is usually reserved for Managers, as a Tax Exempt form is required.

From the Managers "Master Control Page" Press "Tax Exempt"



A confirmation window will appear stating that once the tax exempt button is confirmed, the only way to add tax back onto the check is to VOID all the items on the first check, and re enter the items on a NEW check. There is no "Remove Tax Exempt".



Press "Okay" or "Cancel" to finish

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11.5 Sell Gift Certificate

To Sell a Gift Certificate, the featured Button must be programmed onto the "Master Control" Page. This feature is usually a manager function but the function can also be given to servers, bartenders, and/ or cashiers. The Gift Certificate is rung up like any menu items. The Gift Certificates are listed on all reports for sale verification.

Start a check as described in "Table Service" Section

Press "Master Control"



Choose "Sell Gift Certificate".



Enter the Amount for the Gift Certificate.

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This will add the Gift Certificate as a menu item. The check needs to be closed as described in "Closing an order".

11.6 Gift Card Functions, Internal

Gift Cards function in place of standard paper "Gift Certificates". Cards need to be programmed to have money applied to the card for use.

There are two different type of "Gift Cards". One is "Internal", meaning the information is stored on the File Server, similar to house accounts. The card needs to be "loaded" with the amount for each card.

The other type is External, meaning the information is stored through certain credit card merchants. This feature is dependent on the credit card merchant for each site, and the information can be accessed through the internet.

There are two different sections for Gift Cards, depending on the function. Selling and canceling is done in a guest check, while maintenance is done in the "Other" functions page.

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11.6.1 Selling a Gift Card

To Sell a Gift Card, the featured Button must be programmed onto the "Master Control" Page. This feature is usually a manager function.

Start a check as described in "Table Service" Section

Press "Master Control"



Choose "Sell Gift Card"



Swipe the card through the card reader

An information box will appear to enter who the gift card is for.



Enter the amount for the Gift Card

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A receipt will print showing "Current Balance" and the open check has the amount added to be "closed" as a regular check.

Remember: This is now a sale that is applied to the manager's sales reports and a "Server Report" and "Final Z-Out" will have to be run.

11.6.2 Cancel A Sold Gift Card

If a mistake is made or the Gift Card needs to be canceled, pressing the "Cancel Gift Card" button will remove the sale if the check is still open. If the check is closed but has to be corrected or canceled, "reopen check" on that shift is the only way to correct or cancel the card. Once the shift or day is done, the gift card is in the system and cannot be removed because it is declared revenue.

To Cancel a Gift Card while in the check

From the "Master Control" Page

Press



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When the "Account" list appears, Swipe card.



The sale is removed and the balance is removed. A receipt will print to verify the transaction.

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11.6.3 Outstanding Gift Card Report

To verify or check the outstanding Gift Cards pending in the system for one or all gift cards is done from the "Other" Page.

From the Start page



Press "Other"



Press "Gift Card Report" or "Gift Card Balance"

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The "Gift Card Report" will print a list of all gift cards pending in the system.

"Gift Card Balance" is to check just one card for balance total.

When "Gift Card Balance" is pressed, the "account" look up window will display



Swipe the card for just that balance. A receipt will print with the current balance on that card.

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If more money is to be added to the card, follow the procedure for "Selling a Gift Card".

11.7 Gift Card Functions, External

Gift Cards function in place of standard paper "Gift Certificates". Cards need to be programmed to have money applied to the card for use.

There are two different type of "Gift Cards". One is "Internal", meaning the information is stored on the File Server, similar to house accounts. The card needs to be "loaded" with the amount for each card.

The other type is External, meaning the information is stored through certain credit card merchants. This feature is dependent on the credit card merchant for each site, and the information can be accessed through the internet.

The External Gift Card functions are on the "Other" Page



11.7.1 Sell CC-Gift Card

To Sell a CC Gift Card, use "Other" Button

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On the "Other" Page.



Press



Enter amount to be "loaded" on the Gift Card.

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Swipe the gift card.



A "Submit" window like a credit card submit window will appear.



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Press



A receipt will print showing "Current Balance" and the open check has the amount added to be "closed" as a regular check.

The next screen is the "Media" page to close the check.



Remember: This is now a sale that is applied to the manager's sales reports and a "Server Report" and "Final Z-Out" will have to be run.

11.7.2 Balance

To find the balance of the card, go to "Master Control" page.

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Press "Inquire CC-Gift"



Swipe the card



A receipt will print with the balance on that card.

11.7.3 Void

Voiding an External Gift Card requires the check be open in the "Recall" area. This function is done from the "Other" Page

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On the "Other" Page



Press "Void CC-Gift"



The "Recall" List will show a "Gift Card" icon



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Choose the check

Answer Okay when asked "Do you want to cancel this Gift Card"



A void receipt will print, the check is then voided and closed.

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12 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.

12.1 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.



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12.1.1 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.

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

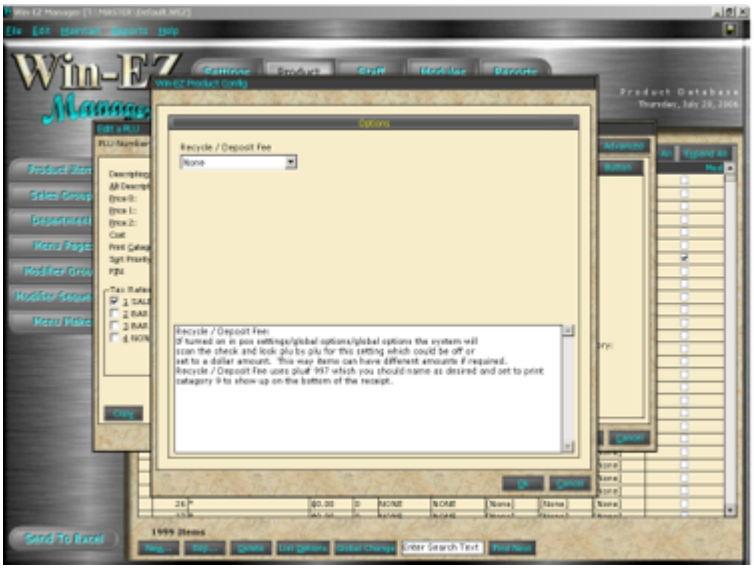


Recycle / Deposit Fee:
If turned on the system will scan the check and look item by item for the setting in *product database/advanced* for whether that item is off or set to a dollar amount. This way items can have different amounts if required. Recycle /Deposit Fee uses Product Item #997 which you 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.

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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.)

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12.1.2 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.

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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

12.1.3 Security

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.



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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:

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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.

12.1.4 Time Clock X/Z

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

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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 their employees to have access to accumulated hour reports as they may change through the modify labor feature in Win-EZ Manager.

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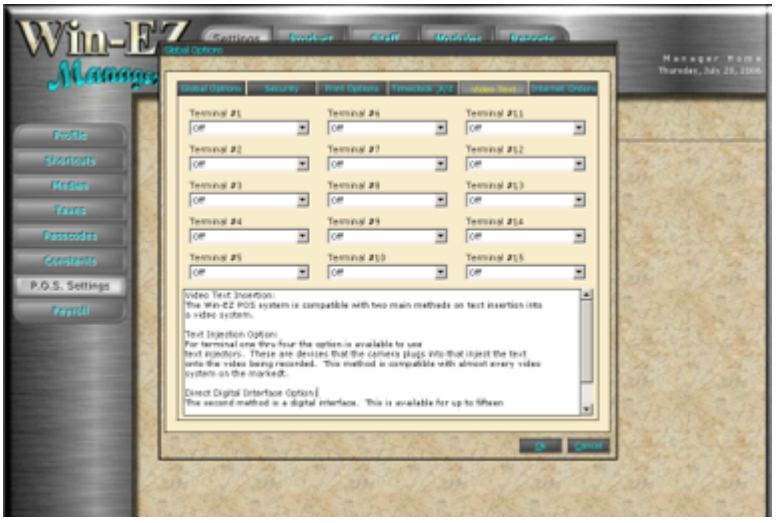
or


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 Cashout. This will help if employees are forgetting to reconcile their cash prior to doing their Final Cashout.

12.1.5 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 inject the text onto the video being recorded.

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This method is compatible with almost every video system on the market.

12.1.6 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 N*ine 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

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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.

12.2 Table Service

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

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12.2.1 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.

12.2.2 Bar

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

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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.

12.2.3 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

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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.

12.2.4 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.

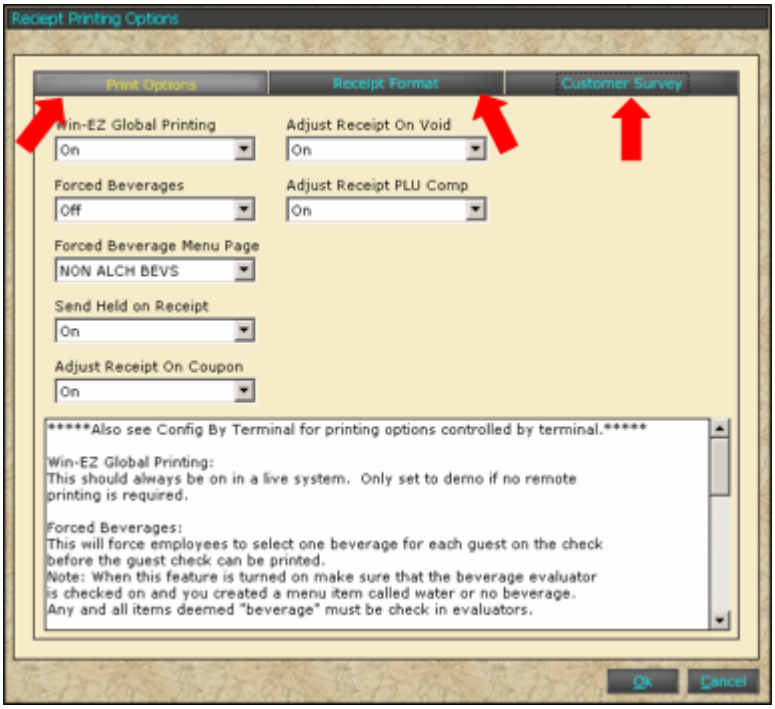
Menu Stop Time:
Enter a stop time with a value less that 3:00am

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12.3 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.

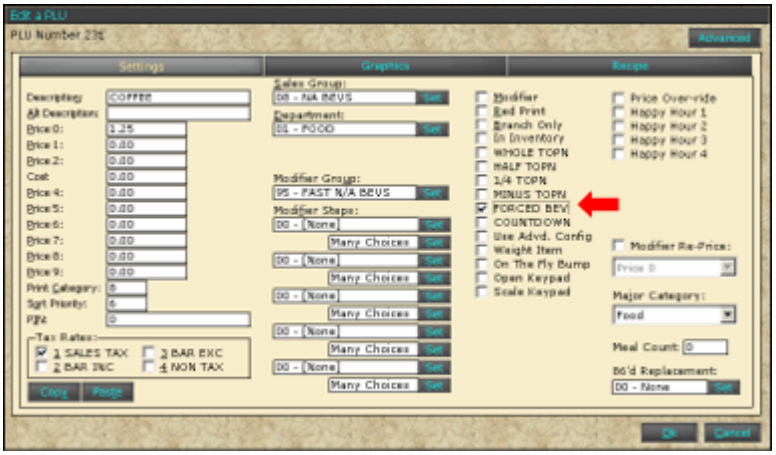


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12.3.1 Print Options

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 of your 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 you created a menu item called *water or no beverage*. 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 "job code config", 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.

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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 PLU Comps.

12.3.2 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.

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.

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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 math impaired customers you may select up to three tip calculation amounts on this tab.

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.

12.3.3 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.

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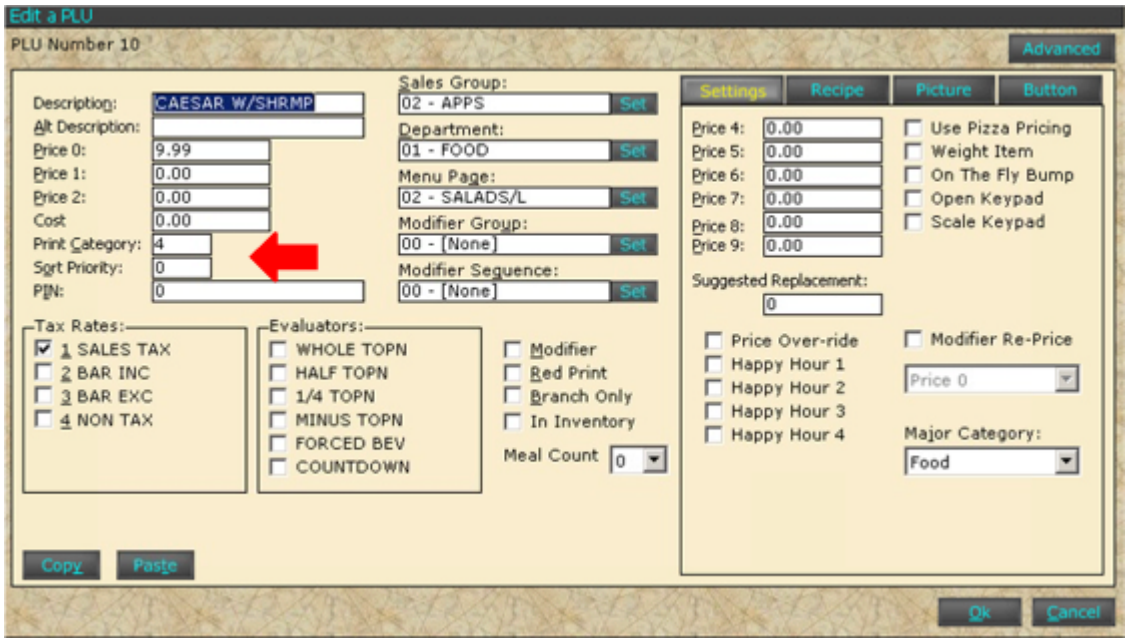
Remember: You must set how often you want a survey to print in Job Code Advanced \ Preferences\How Often to do a Survey?

12.4 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"

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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 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 to the right. 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.

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

Template Style:
You may select the Win-EZ default style or show with seat numbers or prices. You may also choose to use the items 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:* You have a pizza line and a hot line. You want hot items to go to the pizza line but only if there are pizzas on

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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 the 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 you wish to affect. Once at the configuration screen use the space bar to toggle on split screen.

12.5 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 close or open 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.

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

12.6 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.





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12.6.1 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.

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Stamp Total Cash:
Added the non-sales media "True Cash In" and an on/off to P*os Settings/Media Config/Stamp Total Cash*. This will stamp in the True Cash In media all cash collect 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" and
label as desired.

12.6.2 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.





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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.





Allow Over Tender:
This will allow you to 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.

12.6.3 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.

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Win-EZ Credit Card:
This lets the system know you are using Win-EZ high speed credit card.

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. 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

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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.

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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.

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12.6.4 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.

Credit Card Forced Gratuity Security Level:
Select the minimum security level that is allowed to apply a forced gratuity on a credit card. Select from Server, Cashier or Manager. If Server or Cashier is selected, managers can still attach the gratuity. If "Apply Service Charge" is set to on, the security level should be set to "Server".

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.

12.6.5 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.



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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.

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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"

12.6.6 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.



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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.

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Hotel Interface:
This feature is under development. If Hotel Interface is used, an interface will use the house account logic to export sales closed to "Hotel" rooms charges to be used with Hotel Software.

12.6.7 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:

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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.

12.7 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.

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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".

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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 allow you to turn off the local receipt printer if you do not have one on a terminal.

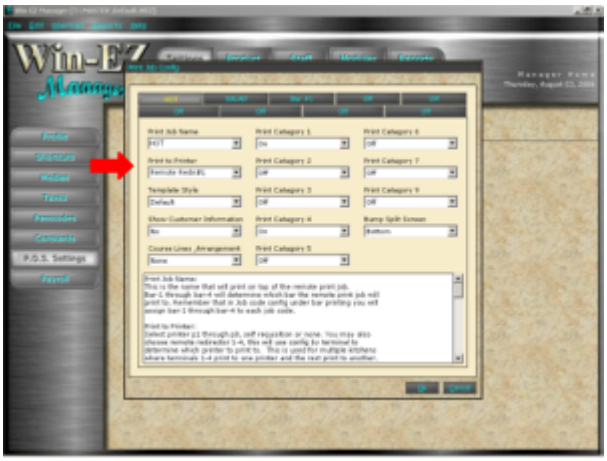
Remote Re Director:
This feature is designed for a Multi Kitchen use. A normal print job goes from a terminal to the printer. With Re-Director the print job jumps the regular print job to check which terminal the print job is directed at.

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.

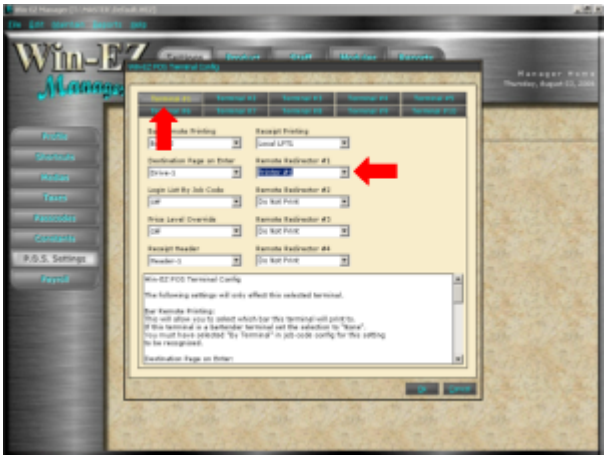
This eliminates the need for multiple print jobs for the same item. This will also redirect the Bump Monitors also.

Print Job:

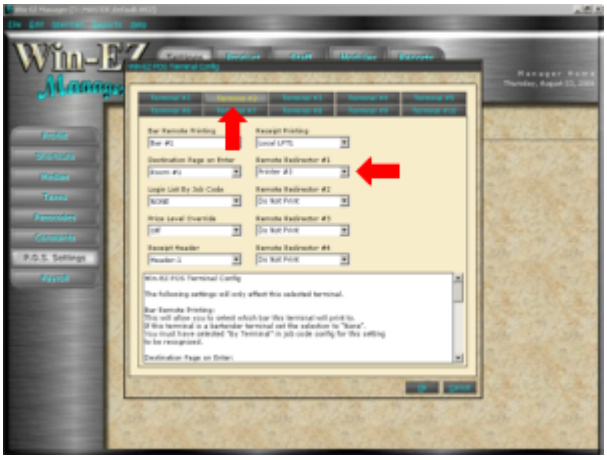
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Terminal #1



Terminal #2



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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.

12.8 Tip Out Refence on Z

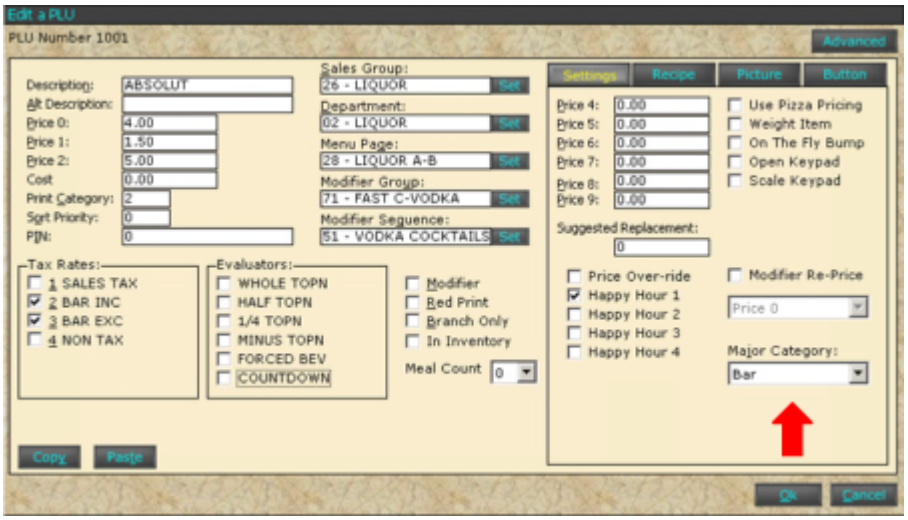
Tip out Reference is used for informational purposes only. Tip out reference will print on the Final Z report so servers can tip out the appropriate amount to "support" staff. This feature is used only as a guideline for servers. This feature will not attach the amount to any support staff on labor reporting. 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.

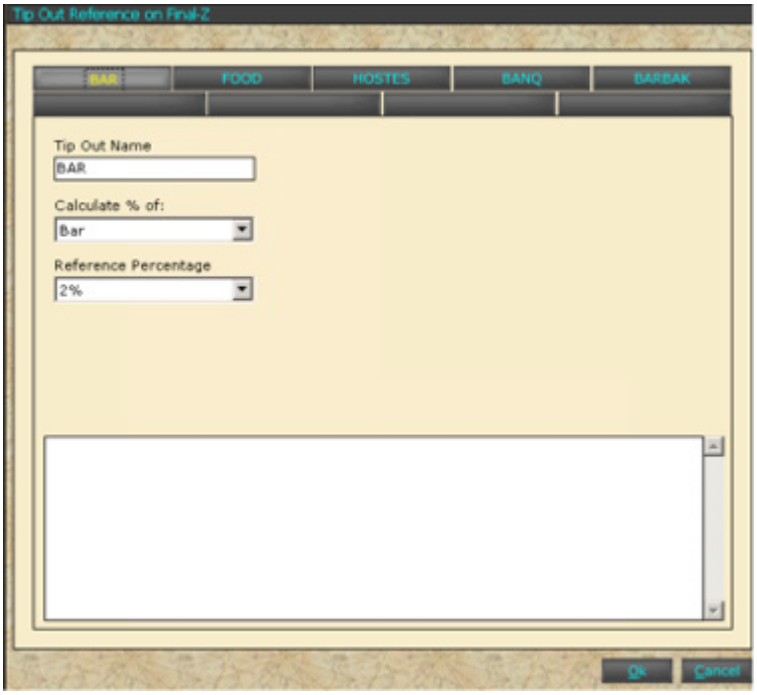
This is a 3 step process.

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

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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.

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12.9 Happy Hour 1-4

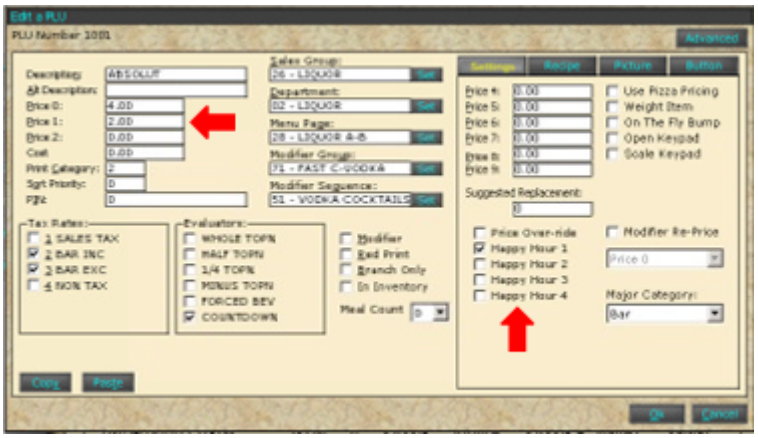
Happy Hour is the generic term used for different "Timed Events". This feature can be used for different price levels such as Early Bird dining, lunch and dinner price differences, or happy hour pricing.

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"

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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.



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)

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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.

12.10 Counter Service Options

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

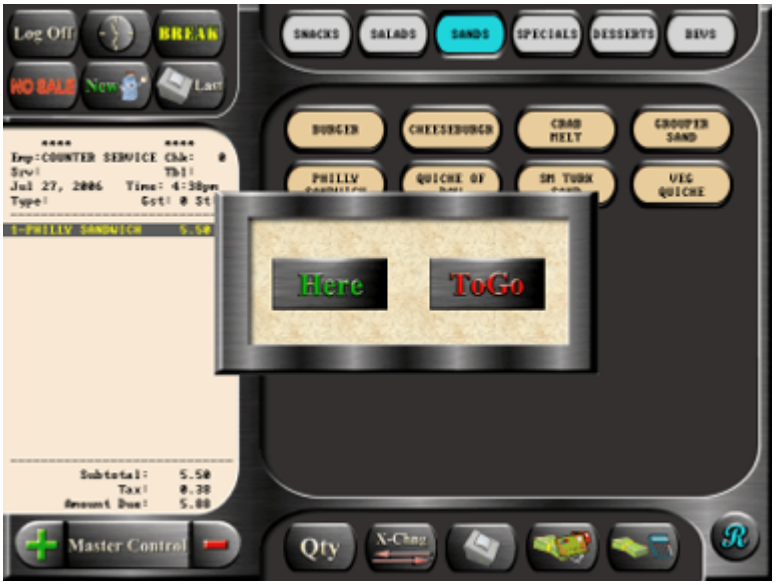


If set to "Beginning"

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



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12.11 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. Please 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

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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

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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, directions,

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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

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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 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.

12.12 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. You can create up to 99 pool tables and up to 19 players. (If a minimum table charge is required place the table minimum in price level 0 of the table Product item)

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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 to 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)

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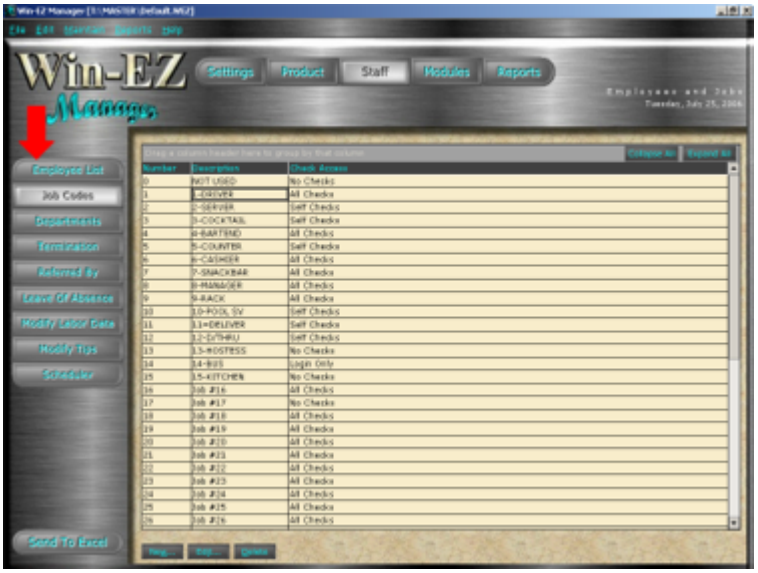


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Part XIII

13 Job Code Specific Settings

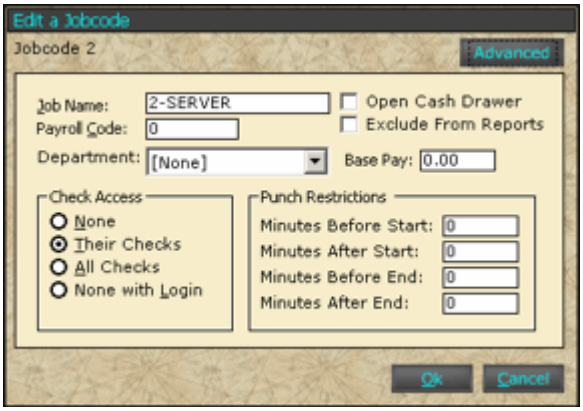
This section will cover the all the settings to turn features on and off and set their parameters. Think of this as the central command center that works in conjunction with the master control and other functions commands. This section explains settings by job code. This provides a way to tell the system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



13.1 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.

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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.

13.2 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.

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There are 6 "tabs". Preferences, Security, Clock & Break, Happy Hour, Final Z Options and Forced Groups. The following sections will describe each.

13.2.1 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

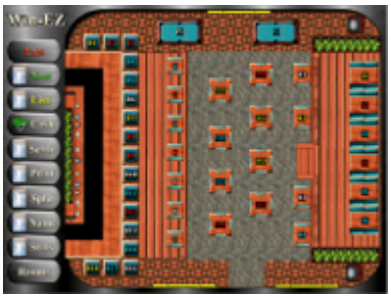


Example: Server

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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.

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Bar 

Server 

Check Closing Security:
This will determine what security level and check closing rights this job code has. This mean 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

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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

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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.

13.2.2 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 you want to restrict print categories 2 and 8 for bartenders enter 28.
If you want to restrict only print category 8 for servers enter 8.
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 you want to restrict print categories 2 and 8 for bartenders enter 28.
If you want to restrict only print category 8 for servers enter 8.
If managers have no restrictions enter 0

Restrict Split off New Check by Seat Cat's:

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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 you want to restrict print categories 2 and 8 for bartenders enter 28.
If you want to restrict only print category 8 for servers enter 8.
If managers have no restrictions enter 0

13.2.3 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)

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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.

13.2.4 Happy Hour

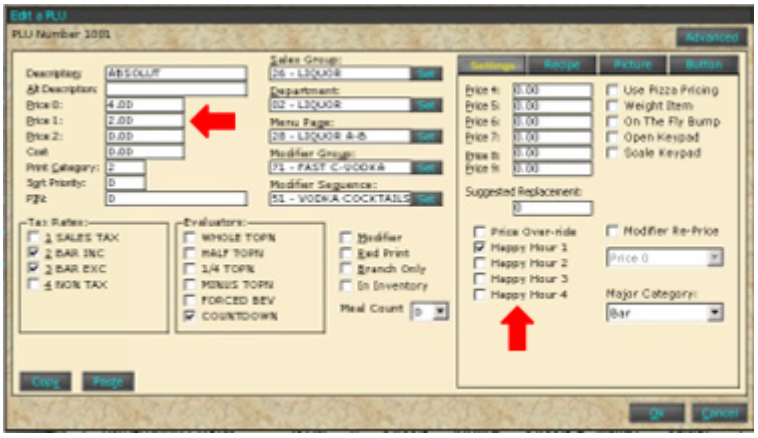
Happy Hour is the generic term used for different "Timed Events". This feature can be used for different price levels such as Early Bird dining, lunch and dinner price differences, or happy hour pricing.

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"

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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)

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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

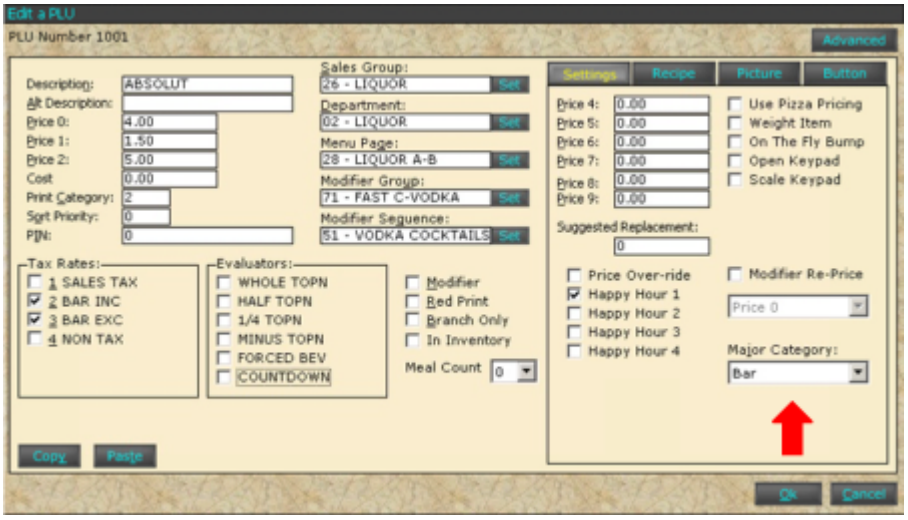
Days of the week:
Enter the days of the week that this timed event is valid.

13.2.5 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.

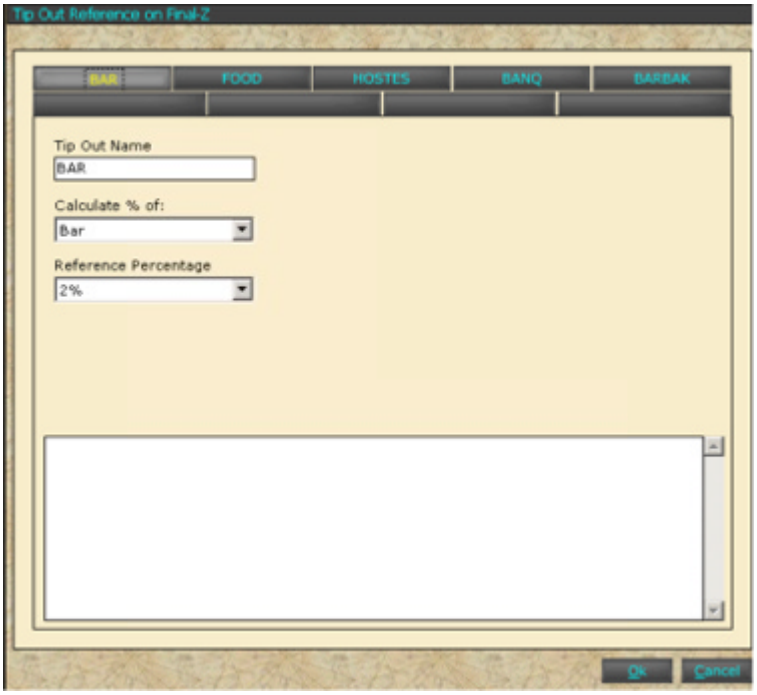
On each menu item, field is set to be either Food or Bar. Using this feature will add up all the Food or Bar items for tip out purposes. If the bartender receives 2% of the bar sales from the servers, the system can automatically calculate that percentage.

This is a 3 step process.
Step One: IN PRODUCT DATABASE
On each menu item, determine where the item is Food or Bar.



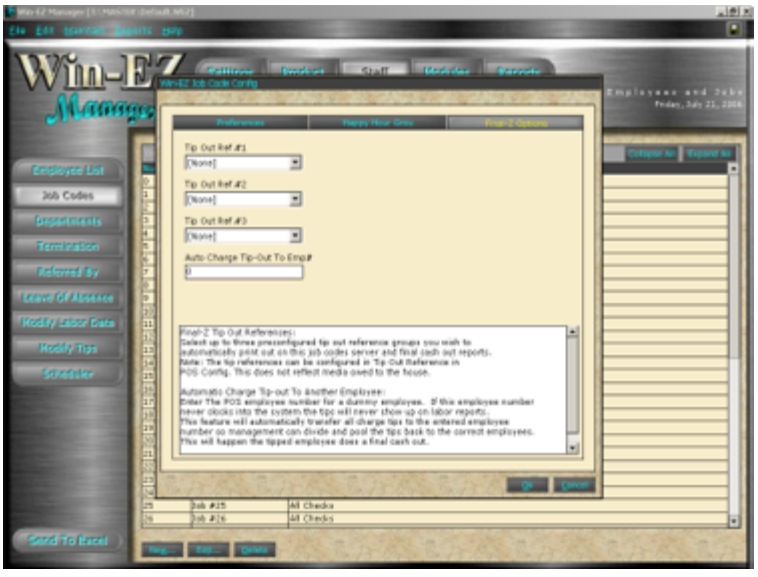
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Step 2: IN POS SETTINGS/ TIP OUT REFERNCE ON Z
Determine the percentage the servers tip out to each "support" staff such as bartenders, bussers, and hosts. Then decide on what Major Category they get a percentage of, such as Food, Bar or Food & Bar.



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, Busser, Bar Back" to the job code that tips out the particular support staff.



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Final-Z Tip Out References:
Select up to three pre configured tip out reference groups you wish to automatically print out on this job codes server and final cash out reports.

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.

13.2.6 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: Deserts 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. Now you can easily see who had the most "No Desserts" and correct the problem. Also if the check states "No Desserts" but there is a dessert on the table immediate action can be taken



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.

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Part



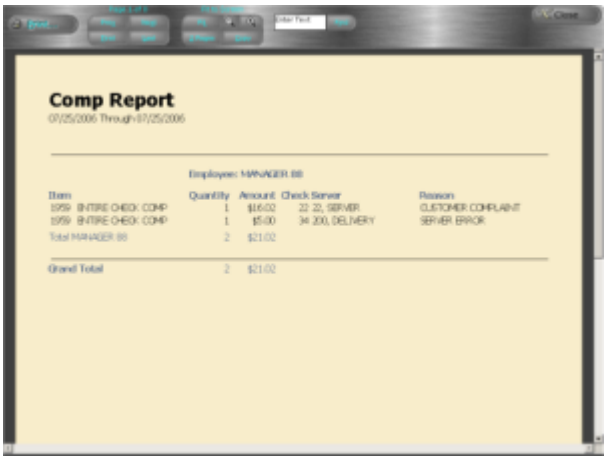
14 Voids Comps Discounts Settings

This section will explain how to set up Coupons, Discounts and Comped items. There are many ways to discount a check and report the revenue. This manual can make suggestions but it is always up the client and a properly licensed accounting professional how to report it.



14.1 Comp Report

The Comp report can be set up listing the comps done by the employee or reason. It can list each item or combine the "Entire Check" together. For further instructions on set-up, see "Win-EZ" Manager manual and POS Settings/ Global.



or

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14.2 Discounts

There are two types of discounts, Dollar off or Percentage off.



DISCOUNT $ DISCOUNT
This will give a pop up of all dollar off discounts that have been created in the database.

% OFF ITEM DISCOUNT
This will give a pop up of all % off item discounts that have been created in the database.

% OFF CHECK DISCOUNTS
This will give a pop up of all % off the entire check discounts that have been created in the database

Each of these requires a Plu with the description of what it is doing.
These will be rung in as a negative item and placed into whichever sales group and department that PLU is assigned. To have the item remove the sales tax as well. Select the appropriate sales tax box. If you do not want sales tax removed then leave all tax rate boxes blank.

The alt. Description field is where each item (P-Product, D-Department, S-Sales Group) is affected.
By placing P=#### it will apply to only one Plu.
By placing D=# it will apply to this department only.

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By placing S=# it will apply to this Sales Group only.

The menu page of the Plu, a. tells it which function button to show up under b. Tells the Plu how to act when selected.
Price level 0 will determine the amount of the coupon, either by $ or %. If the discount is to be 50% off then place .50 in price level 0 field.

Menu Pages:

94. $ OFF MGR DIS- This will place the button under function button "discount $ discount". This will take a set dollar amount off the check.
95. % OFF ITM MGR- This will place the button under function button "discount % off item discount". This will take a set % off the highlighted item.
96. %OFF CHK MGR- This will place the button under function button "discount % off check discount". This will take a set % off the entire check.

If you want the coupons to display these on the guest check give it the print category of 8.

VIP DISCOUNT

To apply a VIP discount select the [VIP] command on the master control page and enter an amount. The system will ask "Please Swipe Card." Swipe the VIP card and a discount will be applied. Upon completion of swiping the card the VIP customer's account will be credited the discount amount for tracking purposes. The Customer Track Dollar field is being used for VIP tracking.

NOTE:

VIP discount uses Product Item #977 and the percentage of discount is determined by the cents placed on price level 0 i.e. .20 will result in a 20% discount. For now the discount only applies to non-bar items this will be user definable in future releases. The numbering scheme for the VIP cards need to start at 1000 and go up from there.

If there is a number greater than zero in the customer track qty field that will be converted into a percentage and used to over-ride the percentage placed in price level zero of the of the VIP discount plu.
Example if price level zero is .15 then all VIP discounts are 15% if on account 1245 LOCAL MAYOR, the track qty field is 30 the standard discount of 15% will be over-ridden with 30% for that VIP account.

14.3 Coupons

There are two types of coupons, open and set. Each type has the ability to have either dollar off or percentage off the item or check.



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Open Coupon with Dollar Keypad
Allows an open coupon to be rung with a user selectable dollar amount. Enter Product Database number in the PLU field in Button Editor and enter a button title.

Open Coupon with a percentage of item
Allows an open coupon to be rung with a user selectable percentage discount of a selected item. Enter Product Database number in the PLU field in Button Editor and enter a button title.

Open Coupon with a percentage of the check
Allows an open coupon to be rung with a user selectable percentage discount of a check. Enter Product Database number in the PLU field in Button Editor Maker and enter a button title





Coupon dollar Coupon ($$$ Coupon)
This will give a pop up of all dollar amount coupons that have been created in the database.

Percentage Item Coupon (% Item Coupon)
This will give a pop up of all % off item coupons that have been created in the database.

Dollar Off Item Coupon ($ Item Coupon)
This will give a pop up of all $ off item coupons that have been created in the database.

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Percentage Check Coupon (%Check Coupon)
This will give a pop up of all % off entire check coupons that have been created in the database.



Each of these requires a Plu with the description of what it is doing.
These will be rung in at as a negative item and placed into whichever sales group and department that PLU is assigned. To have the item remove the sales tax as well. Select the appropriate sales tax box. If you do not want sales tax removed then leave all tax rate boxes blank.

The alt. Description field is where (P-Product, D-Department, S-Sales Group) is affected.
By placing P=#### it will apply to only one Plu.
By placing D=# it will apply to this department only.
By placing S=# it will apply to this Sales Group only.

The menu page of the Plu, a. tells it which function button to show up under b. Tells the Plu how to act when selected.
Price level 0 will determine the amount of the coupon, either by $ or %. If the coupon is to be 50% off then place .50 in price level 0 field.

Menu Pages:
92. $ OFF ITM COUP- This will place the button under function button "coupon $ item coupon". This will take a set dollar amount off the highlighted item. Not to exceed the highlighted items total price.
97. $ OFF CHK COUP- This will place the button under function button "coupon $ coupon". This will take a set dollar amount of the entire check.
98. % OFF ITM COUPS- This will place the button under function button "coupon % off item coupon". This will take a set % off the highlighted item.
99. % OFF CHK COUPS- This will place the button under function button "coupon % off check coupon". This will take a set % off the entire check.

If you want the coupons to display these on the guest check give it the print category of 8.

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14.4 Voids



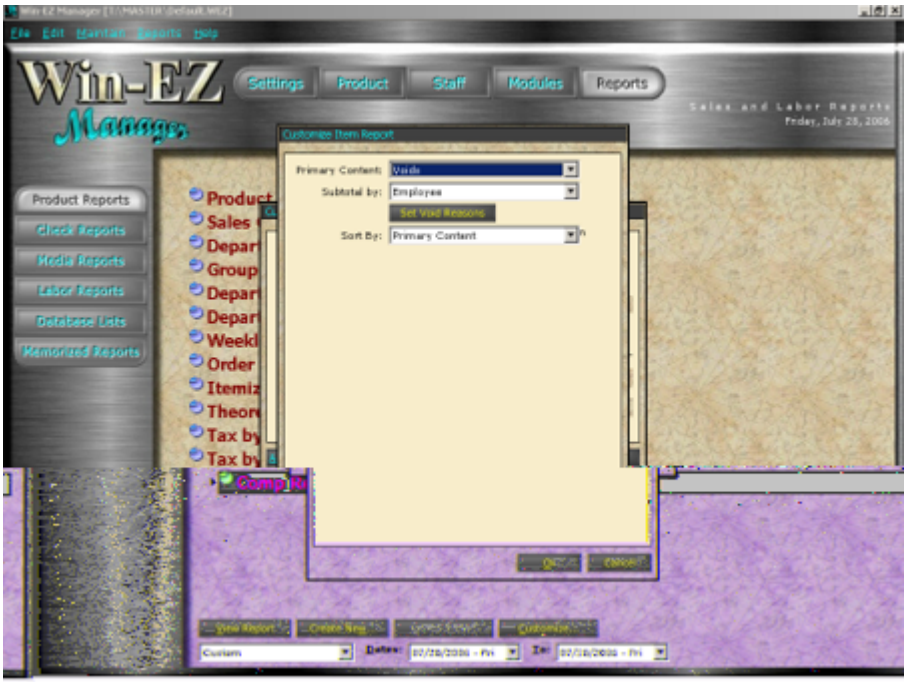
VOID REASON 99
This will allow an item to be voided off a check. This is to be used if the item is not desired to be calculated into the daily sales and then backed out as a comp. Highlight the item to be voided and press the void button. A void cannot be done on an item that has no monetary value. Highlight the line with the amount in order to void the item. This will be reported directly to the void reason 99.

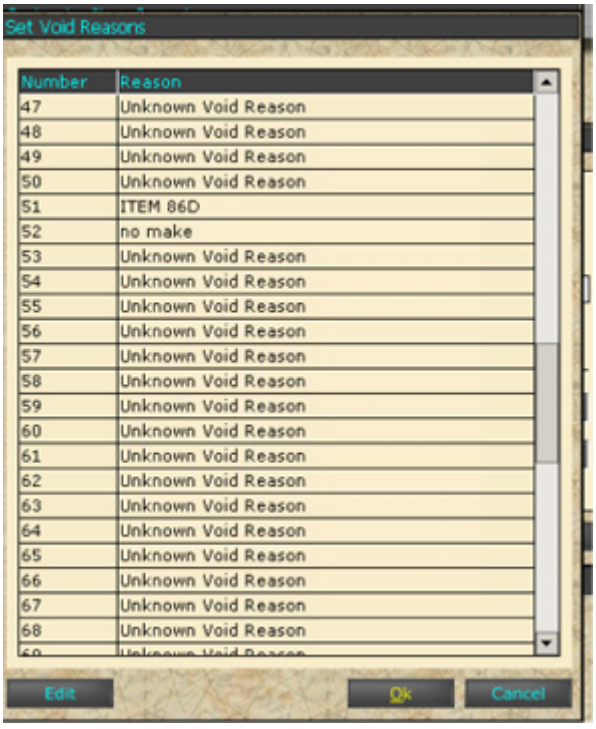
VOID ITEM
This will allow an item to be voided off a check. This is to be used if the item is not desired to be calculated into the daily sales and then backed out as a comp. Highlight the item to be voided and press the void button. A void cannot be done on an item that has no monetary value (modifier). Highlight the line with the amount in order to void the item. This will give a list of reasons for the void and will be reported to the chosen void reason in the comp report.

VOID ALL ITEMS
This will allow all the items to be voided off a check. This is to be used if the items are not to be calculated into the daily sales and then backed out as a comp. This will give a list of reasons for the void and will be reported to the chosen void reason in the comp report. This feature voids the complete check. If "Void All items" is used instead of "Void Item" the whole check must be re rung. There is no way to clear a Void once it is done.

To Set Void reasons use Void Reason 51 and higher.
In Win-EZ Manager/ Reports/ Comp Report/ Customize/ Advanced

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14.5 Comps

Comps are divided up into 4 main sections. Each will give a list as to the reason for the comp. A comp is used when the menu item is prepared but for some reason the guest is not paying for the item or check.

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DOLLAR COMP ITEM
This will remove a dollar amount of an item off a check. This is to be used if the item is desired to be calculated into the daily sales and then backed out as a comp. Highlight the item to be comped and press the dollar comp item button. An item that has no monetary value cannot be comped. Highlight the line with the amount in order to comp the item. This will give a list of reasons for the comp which will be reported to the chosen comp reason in the comp report.

DOLLAR COMP CHECK
This will remove a dollar amount off a check. This is to be used if the amount is desired to be calculated into the daily sales and then backed out as a comp. This will give a list of reasons for the comp which will be reported to the chosen comp reason in the comp report.

PERCENT COMP ITEM
This will remove a percentage of an item off a check. This is to be used if the item is desired to be calculated into the daily sales and then backed out as a comp. Highlight the item to be comped and press the percentage comp item button. An item hat has no monetary value cannot be comped. Highlight the line with the amount in order to comp the item. This will give a list of reasons for the comp which will be reported to the chosen comp reason in the comp report.

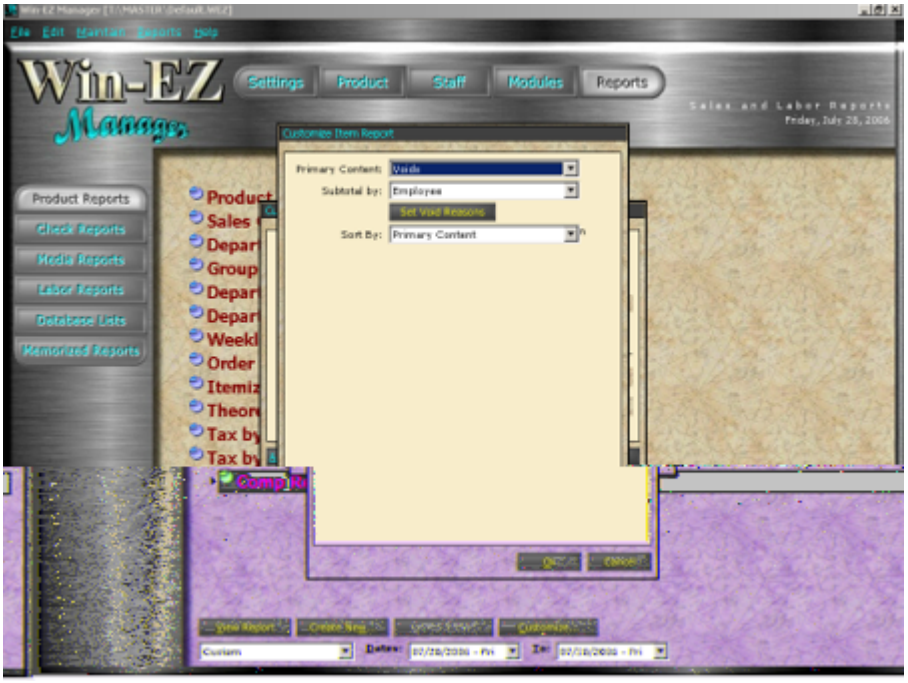
PERCENT COMP CHECK
This will remove a percentage amount off a check. This is to be used if the amount is desired to be calculated into the daily sales and then backed out as a comp. This will give a list of reasons for the comp which will be reported to the chosen comp reason in the comp report.

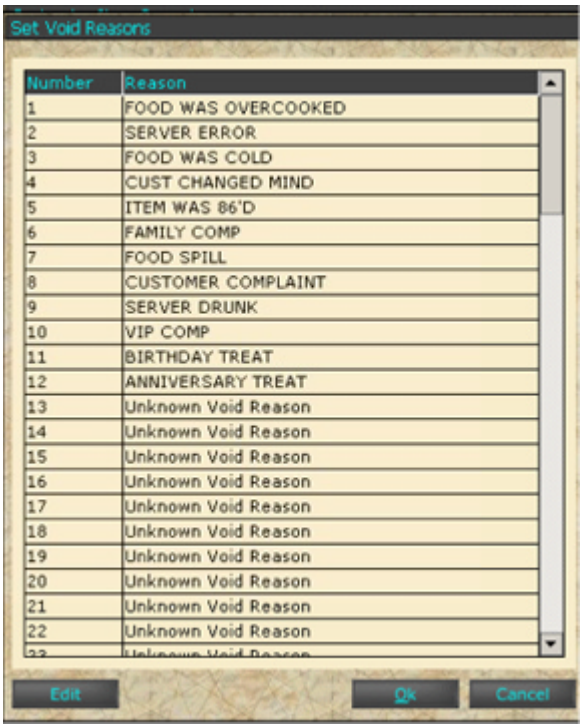
CLEAR COMP
This will clear all comps from a check. When a comp is cleared, the comp list will appear to give a reason as to why. This is helpful when mistakes are made when comping a check. Clear comp does not work if using the PLU based comps.



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To set Comp reasons use Void Reason 1-50
In Win-EZ Manager/ Reports/ Comp Report/ Customize/ Advanced





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DOLLAR CHECK COMP (W/ PLU)
This will apply a dollar comp with a negative plu discount to all items on the check.

Set Up:
After placing the command on a master control page, make sure that food is on department 1, bar is on 2-7 and retail on department 8. This command uses plu 1948-1950 for food comp, bar comp and misc. comp. When selected the system will divide up the check into the three major departments and order a comp item for each one. *This will reduce the sales in that department.*

PERCENT CHECK COMP (W/ PLU)
This will allow you to apply a percentage comp with a negative plu discount to all items on the check.

Set Up:
After placing the command on a master control page, make sure that food is on department 1, bar is on 2-7 and retail on department 8. This command uses plu 1948-1950 for food comp, bar comp and misc. comp. When selected the system will divide up the check into the three major departments and order a comp item for each one. this will reduce the sales in that department.

DOLLAR ITEM COMP (W/ PLU)
This will allow you to apply a dollar comp with a negative plu discount to an item on the check.

Set Up:
After placing the command on a master control page, make sure that food is on department 1, bar is on 2-7 and retail on department 8. This command uses plu 1948-1950 for food comp, bar comp and misc. comp. When selected the system will divide up the check into the three major departments and order a comp item for each one. This will reduce the sales in that department.

PERCENT ITEM COMP (W/ PLU)
This will allow you to apply a percentage comp with a negative plu discount to an item on the check.

Set Up:
After placing the command on a master control page, make sure that food is on department 1, bar is on 2-7 and retail on department 8. This command uses plu 1948-1950 for food comp, bar comp and misc. comp. When selected the system will divide up the check into the three major departments and order a comp item for each

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one. This will reduce the sales in that department.

100% $ Close
This feature comps 100 percent of the check and closes the check to cash (0.00 balance). This button is used in a high volume bar/ casino environment and can be difficult to use. If this feature is used by mistake the check would have to be reopened by a manager and adjusted accordingly. The items are deducted from the original Department and Sales Groups.

14.6 Employee Meal



EMPLOYEE MEAL
This will apply an employee discount to all items on the check.

Set Up:
After placing the command on a master control page, enter the employee discount plu number in the Product Item entry box in manager. On the plu enter the amount that the employee pays for items in price level 0.

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15 Win-EZ Doctor

Win-EZ Doctor is used for system maintenance. A special code is needed to access this section. The following items are the most commonly used features.

To access Win-EZ Doctor from the Start Screen, press "Win-EZ"



Enter the Password provided by a Win-EZ representative.



The following screen will display.

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COMMONLY USED FUNCTIONS:

Calibrate: This function re aligns the touch positions. After pressing "Calibrate" the screen will go white with instructions to press the targets from a position of normal use.

Check Fix: This function will release any checks that may lock open in the system. It rarely happens and is not used very often.

Drawer 1 and 2: This button will open the cash drawer.

Test P1-P8: Tests any remote printers online.

Receipt: This test prints any local receipt printers attached to that terminal.

Load Chngs: Forces a complete system refresh from the file server.

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16 Delivery Service

The Win-EZ system comes with a simple delivery system built in. This is designed for the table service restaurant that also does a small amount of delivery. This section will cover how start and order, start a phone order, to dispatch checks to drivers and the settings that relate to the delivery needs of the users. With most delivery service restaurants there is a combination of jobs. Counter order taker, phone/delivery service order taker and a driver who takes the order. This section will cover all three.

16.1 New Delivery Order

The Phone Delivery person starts at a "New Check".



A normal order screen will show

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Choose the "New Phone" Button



If Caller ID module is purchased and installed the following screen will appear



Pressing the line to be answered then "done" will either take you to the existing customers information or the system will prompt you to enter information for this customer.

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If Caller ID is not being used the following screens will prompt for a phone number then the customers information such as address and any special instructions.





If the customer is new, Start by entering the new phone number and pressing "Enter"



Enter the information needed for your records (for Caller ID or regular phone service) such as name, address, any special instructions on either the keyboard on the screen or physical keyboard, if one is provided at the terminal.

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If using Caller ID, Press the 

to assign the customer to a specific zone for delivery dispatching and fees if applicable.

A list of Zones will be displayed. Set up of Zones are done in POS Settings/ Delivery/ Zones



If the customer is already in the database, use the following buttons





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Either button will provide a list of customers already in the database



Choose the customer needed.

If it is an existing customer, the items from the last time they ordered will show, along with their customer information.



If the customer orders the same items, by using the "Keep Item" or "Keep All" will save time when ordering items.

Choose "Delivery".

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If "Promise Time" is on, a list of pre programmed times, in half hour increments will be shown



If the order is needed at a specific time, use the clock to put in a actual time.

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If the "Media at Start" feature is on, ask how the customer will pay. This is especially helpful in a delivery environment.



Order items needed.

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When finished, press "Exit" or "Print". This will send the check to the kitchen to be made and start a new check for the next phone order.

16.1.1 Dispatch/ Driver Out

Once the order is placed, it is waiting to be "Dispatched" to a driver. The following buttons should be programmed on the phone/ delivery service order taker.

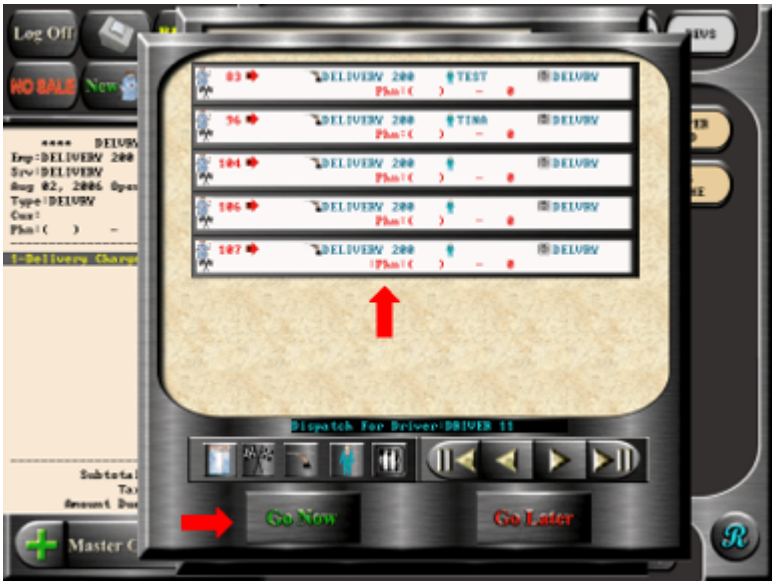


When an order is ready to be "Dispatched" to a driver for delivery, Press "Dispatch". The system will ask to which driver this order is being dispatched to.

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Choose the check that is being "dispatched" to that driver. More than one check can be dispatched at the same time



After choosing which checks, if "Go Now" is selected will log that driver out on a run. The driver will not be on the list of available driver on the next dispatch until they have returned.

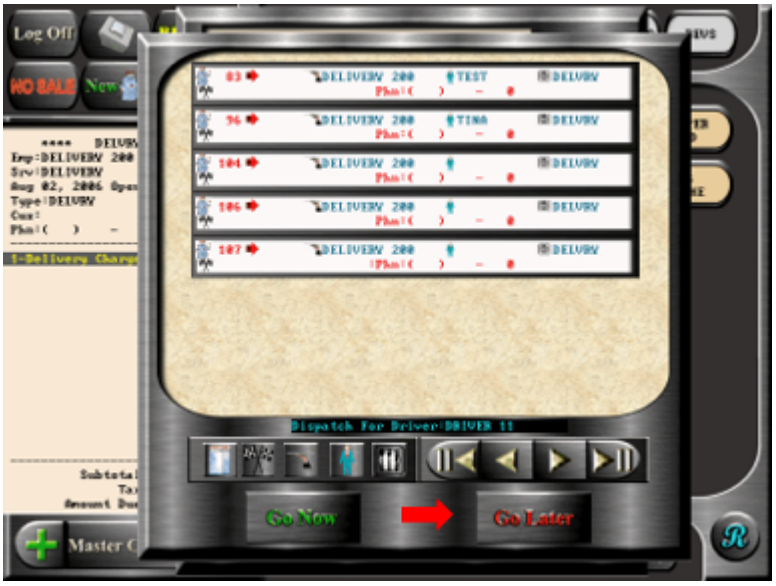
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A message will display confirming the driver has been dispatched.



If "Go Later" is chosen the check is in limbo waiting for the driver to be assigned more orders to "Go Now".



If "Self-Dispatch" feature is being used, the order taker and delivery person is the same. When the order is ready to be dispatched, using "Self-Dispatch" will by pass the steps to assign a driver.

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16.1.2 Un Dispatch

If an order was assigned to a certain driver but that driver cannot deliver the order, it has to be "Undispatched" and redispatched to a different driver.

REMEMBER: UNDISPATCH CAN ONLY BE DONE IF THE DRIVER WAS NOT SENT WITH "GO NOW".

To "Undispatch" an order, Press "Undispatch".



This will show the list of all orders pending to be delivered.



The order is removed from the "Dispatched" orders, waiting to be dispatched to another driver.

16.1.3 Driver In

When a driver returns from a delivery, they must let the system know they are back from a delivery.

From the "Start" Screen

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Enter the driver's employee Number and press "Recall".

A message will appear confirming the driver is back from delivery.



16.1.4 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.*

At the "Start" Page, press "Recall"

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The system will confirm that the orders should be closed to this media.



If "Okay" is press, a receipt will print for every check closed.

16.2 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.

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To enter a specific time, touch the clock button



Then enter the specific time



16.3 Proposed Media

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 beginning of an order or the end. Set up is in POS Setting/ Simple Delivery.

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16.4 Delivery Charges

Delivery Charges are determined by entering a dollar amount into Product item number 988. If a zero amount is entered (0.00) no delivery charge will be added to the check



16.5 Manager IOU

Manager IOU, if turned on in POS Settings/ Simple Delivery, will allow a phone person to apply a manager credit to a new order.

The command "Edit Cus-Mgr" must be added to the "Master Control" page.

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After selecting the customer, Press "Master Control" "Edit Cus-Mgr". This will then display the customer information. Tab to the field of "MGR $" and enter the IOU credit.

The next time the customer order, a negative dollar amount with "Manager IOU" will be credited to the account. Any balance not used will automatically be credited back to that customers account.

16.6 Edit Customer Information

To edit an existing customers information, the command button must be added to a job code's "Master Control" page



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With the account open, as if to start a new order, press "Master Control" "Cus Edit"

The screen that displays when creating a new customer will show with the information for that customer already entered



Make any necessary changes to the customer by using the "tab" button on the keyboard or the arrow keys on the virtual keyboard.



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17 Quick Service/ Counter Service

The Win-EZ counter service system is design for a walk up counter and drive thru environment. This section will cover how to start and order, start a phone order and the settings that relate to the counter service needs of the users.

17.1 Start an Order

At the "Start" page, enter employee number and press "New Check"



The system will ask if the order is for here or to go



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Order the items needed.

With Quick Service/ Counter Service "Fast Cash" buttons are usually programmed.

Settle with Cash Keypad



This will give a keypad where the amount of cash received may be entered. Then select the close button to receive the change due.



After the amount is entered, the check is closed to cash and a new order is started. The question of "Here/ To Go" is asked at this time.



This takes the Counter person directly into a new order.

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17.2 New Phone Order

When placing a new Phone order, more information is needed. Phone orders are generally used if a delivery system is being used. This allows for phone, addresses, Last order and Special instructions to be entered for repeat customer information.

Choose the "New Phone" Button.





At the following screen, some choices must be made. If it is an existing customer, by entering their phone number, Asking for a list by name, account or phone number, the information already stored in the system will be displayed.





If the customer is new, Start by entering the new phone number and pressing "Enter".

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Enter the information needed for the customer database such as name, address, any special instructions on either the keyboard on the screen or physical keyboard, if one is provided at the terminal.



If the customer is already in the database, use the following buttons





Either button will provide a list of customers already in the database

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Choose the customer needed.

If it is an existing customer, the items from the last time they ordered will show, along with their customer information.



If the customer orders the same items, by using the "Keep Item" or "Keep All" will save time when ordering items.

Choose "Here" "To Go" or "Pick Up" as an order type for packaging.

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If the "Media at Start" feature is on, ask how the customer will pay. This is especially helpful in a delivery environment.



Order items needed.

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When finished, press "Exit" or "Master Control".

17.3 Print Last

This feature remembers the last order closed and allows the user to print that order with one touch while inside the next order. This is used mostly in quick service but can be used elsewhere.

17.4 Break Funcitons with Open Checks

If an employee is programmed with the job code of "Break" the system allows for that employee to clock in or out for a break without leaving the open order.



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Press "Break".

Enter the employee number who is taking a break.



A message will display confirming the break. When the employee is off break, the same button is used with a confirmation message that the employee is now off break, back on the clock.

17.5 Log off

To exit the fast cycle of opening checks in a Quick Service Environment, a "Log Off" key is provided.



This takes any logged in employees back to the "Start" page.

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17.6 Clock Out

To clock out employees while in an open check, Press the clock button



This will clock the employee out as described in the *Time Clock* section.

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18 Pool Service

The Win-EZ Pool table system will allow the user to time pool tables and set up pricing rules. This section covers how to start, stop and suspend play. The user can also do generic rental such as jet skis or canoes using the same setup but different commands. The pool table module also has the ability to turn on and off pool table lights with the module Light Manager. For instructions on Light Manager please refer to the Light Manager documentation.

The following page is a server's "Master Control" page. To allow functions for servers or managers the "Command" buttons must be attached to the "Master Control" page of that job code.



18.1 Pool Table Functions

Open a New table
Touch the table within the selected room and instead of a being asked to select number of covers the system will ask to select the number of players. At that point the pool table is in play. "Edit Table Room" will explain how to set up a Pool table which must start with the letter "P".

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By adding the command buttons on a job code's "Master Control" page, the following functions can be done. NOTE: Depending on the security level set up in "POS Settings", some functions will not be needed on certain job codes.



Start Play:
Press "Start PL" to select the number of players



Suspend Play:
Press the "Suspend Play" button and the system will close out the table and automatically

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restart it with the "Suspend" mode.

Resume Play:
Press the "Resume Play" button and the system will automatically restart it with the correct number of players.

Start Table:
Select the "Start Pl" button and the system will do a query to assure that the table is in play. Then, the system will ask to select the number of players. At that point the pool table is in play.

Start Table-Manager:
Select the "MGR Start" button and the system will do a query to assure that the table is in play. Then, the system will ask to select the number of players. At that point the pool table is in play. In addition the manager version allows the start time to be user defined with a time keypad.





Stop Table:
Select the "Close Pool" button and the table play will be ended, roundup will be calculated, minimum table charge will be considered and the menu items configured in pool table config will be ordered. Note: Any time the system ends play it will divide the total table charge by the number of players and order a separate item for each player. This makes splitting checks much easier and allows people who are leaving to pay their portion when they leave.



Stop Table-Manager:

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Select the "Close Pool" button and the table play will be ended, roundup will be calculated, minimum table charge will be considered and the menu items configured in pool table config will be ordered. Note: Any time the system ends play it will divide the total table charge by the number of players and order a separate item for each player. This makes splitting checks much easier and allows people who are leaving to pay their portion when they leave. In addition the manager version allows the stop time to be user defined with a time keypad.

Add Joiners:
Allows user to add players who are joining. Touch the "+JOINERS" button and the system will automatically close out the table. The system will calculate the exact minutes played at that price level, order the appropriate menu items, change the cover count and restart the table at the new price rate.



Split Off Leaver's:
Allows user to split off players who are leaving and wish to cash out. Touch the "-LEAVERS" button and the system will automatically close out the table. For the players staying the system will calculate the exact minutes played at that price level, order the appropriate item and restart the table at the new price rate. For the players leaving the system will calculate the minutes played while respecting the house roundup and table minimum rules. Next the system will create a new check with an "S" in place of the "P" in the table name and pop a window filled with the remaining items on the original check that can be move to the party leaving. Upon completion the user can tender the "S" check to the desired media and close.



Move Pool Players:
Allows the user to move players to a different pool table taking their play session and items ordered with them. Select the "MOVE POOL" button and the system will pop a window with available pool tables. It will automatically close out the table. The system will calculate the

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exact minutes played at that price level, order the appropriate menu items and restart the new table at the new price rate.

View Pool Tables:
Allows the user to view a list of all, in play and available tables with accrued minutes and total charges. (Note Minutes and charges both respect rounding and minimum rules stated on page one.) The highlighted table will also display the time started and the price rule. Select the "Print" button to print the table report or cancel to close the window.

18.2 Rental

This feature will show you all rentals in/ rentals out and available rentals. To manually start a rental, highlight the desired rental and press the "Start Rental" button. If the selected rental only has one price rule attached the rental will be started. If multiple rules exist the user will be asked to select from a list of approved price rules. Cancel can be pressed at any time to get out of this function. To end a play session highlight the desired rental and select the "Close Rental" button. The rental session will be ended, roundup will be calculated, minimum rental charge will be considered and the menu items configured in pool table config will be ordered. Note: Any time the system ends a rental session it will divide the total rental charge by the number of covers and order a separate plu for each player. This makes splitting checks much easier and allows people who are leaving to pay their portion when they leave. (If manually ending a rental session on the user must make sure that they are in the right check as the menu items with prices will be ordered in that check.)

Rental MGR is the same as Rental Master with the addition of Time Keypads for starting and ending a rental session. This allows managers full flexibility in changing rental times and accommodating customers needs.



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