

| Day 1 | | | | | |
|---------------------------------|--|---------------------|--|--|-----------------|
| SAMPLE Training Agenda | | | | | |
| Agenda | Basic IG 101 - 2 Day | | | | |
| Workshop Training Title: | Intro to Supporting IG SaaS /12ux (Basic IG 101 - 2 Day) | | | | |
| Location: | Agilysys Office, 6795 Agilysys Way, Las Vegas NV 89113 | Date: | Monday | Time: | 8:00 AM-6:00 PM |
| Facilitator: | Noel Huerta Sr Manager of Support | SME Trainer: | Noel Huerta, Sr Network Tech Manager Premier Customers Sr L3 Technicians: Ninette Lima,, Frank Marquez, Ernie Rittaca, Tony Vuong , and Jeff Oneil | | |
| Activity (Outline) | | Estimated Time | Method | Resources (Speaker, Materials, Handouts, Test Environment) | |
| 8:00 AM | Welcome | 15 Mins | Facilitator explains their role and background with program. | PowerPoint slide 1 Coffee and snacks | |
| 8:15 AM | Warm-up and introductions Ice-breaker: Stand up if you ... (e.g. use more than one Agilysys product; have technical background, are a power user) | 60 Mins | Go around the room for introductions – name, where you are from, and your best IG work tip. | N/A | |
| 9:15 AM | Learning objectives: Participants will: 1. Understand IG architecture & Basic Troubleshooting 2. Basic Terminal Training 3. Peripherals & Hardware | 60 Mins | Provide overview of architecture. Troubleshooting check flow (have participants troubleshoot a checkflow issue). Explain operating a terminal, certified peripherals, and hardware process. | PowerPoint slide 2 | |
| 10:15 AM | Break: 10:15 – 10:30 AM | 15 Mins | | | |
| 10:30 AM | Universal Desktop Training Main points: 1. What is UD 2. Installing UD 3. UD system architecture | 60 Mins | Lecture regarding UD and basics. | PowerPoint slides 3-5 Blackboard or chart for writing Warning signs checklist (handouts) | |
| 11:30 AM | Exercise: UD configuration. Objective: To have participants understand how to configure their UD. From creating an enterprise to user creation. | 90 mins | Group breakout session. Break out into teams and configure your own UD in sandbox. Enterprise, Division, Store, User, etc. | PowerPoint slides 6 Exercise Worksheet Blackboard or chart for writing | |

| | | | | |
|----------------|--|---------|--|---|
| 1:00 PM | Lunch Break: 1:00 – 2:00 PM | 60 Mins | | |
| 2:00 PM | Exercise Debrief | 45 mins | Large group discussion: Ask each small group to share ideas and note on blackboard. Regarding what they learned in first half of the day. | Blackboard or chart for writing |
| 2:45 PM | Kitchen Printer Basics Main points: 1. KP and how it works 2. KP Cinfo Blow out 3. Advanced Issues | 45 mins | Lecture regarding KP and troubleshooting steps. | PowerPoint slides 7-8 Blackboard or chart for writing |
| 3:30 PM | Break: 3:30 – 3:45 PM | 15 Mins | | |
| 3:45 PM | Network Troubleshooting (Wireshark) and IG Main points: 1. Basic network troubleshooting 2. Wireshark basics | 60 mins | Lecture regarding network troubleshooting and wireshark usage. Small exercise with finding network issue. | PowerPoint slides 9-10 Blackboard or chart for writing |
| 4:30PM | Overview/Questions & Daily Assessment of Skills | 45 mins | Certification of Skills | Assessment of Skills Certification of Skills |
| 5:00PM | Training Evaluation/Feedback /Closing | 15 Mins | Explain purpose and asks one participant to collect them. | Feedback form (anonymous) |
| | | | | |
| | | | | |

Agilysys..

InfoGenesis POS Administrators Training Agenda



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Contents

| | |
|--|----|
| Introduction | 5 |
| Instructor | 5 |
| Participants | 5 |
| Course Objectives | 5 |
| Certification | 5 |
| Facility Review | 5 |
| Navigation Tools..... | 5 |
| Purpose | 5 |
| Universal Desktop Structure Basics..... | 6 |
| Viewing Information | 6 |
| Home/Start Page | 6 |
| Window Basics..... | 6 |
| Layout..... | 6 |
| Employee and Job Code..... | 7 |
| Key Points | 7 |
| Employee Groups | 7 |
| Key Points | 7 |
| Employees with Multiple Job Codes..... | 8 |
| Key Point..... | 8 |
| Deleting and Terminating Employees | 8 |
| Key Points | 8 |
| Job Code | 9 |
| Key Points | 9 |
| Beginning Configuration | 10 |
| Key Points | 10 |
| Profit Centers Groups | 10 |
| Purpose | 10 |
| Add Profit Center Groups | 10 |
| Meal Periods..... | 10 |
| Purpose | 10 |
| Discounts and Coupons | 11 |
| Purpose | 11 |
| Coupons..... | 11 |
| Discounts | 11 |
| Check Types | 11 |
| Purposes | 11 |
| Tips, Gratuities and Service Charges | 11 |
| Definitions..... | 11 |
| Gratuities..... | 11 |
| Voids | 12 |
| Key Points | 12 |
| Purposes | 12 |

| | |
|---|----|
| Items | 12 |
| Purpose | 12 |
| Product Class | 12 |
| Security Levels | 12 |
| Miscellaneous Detail | 12 |
| Item Options | 12 |
| Item Links | 13 |
| Modifiers, Choice Groups and Special Instructions | 13 |
| Key Points | 13 |
| Choice Groups and Modifiers | 13 |
| Adding Modifiers | 13 |
| Adding Choice Group..... | 13 |
| Multiple Choice Groups | 14 |
| Purposes | 14 |
| Process..... | 14 |
| Nesting Choice Groups | 14 |
| Purpose | 14 |
| Process..... | 14 |
| Special instructions..... | 15 |
| Key points | 15 |
| Process..... | 15 |
| Meal Period Schedule | 15 |
| Key Points | 15 |
| Assign Meal Period Schedule Times | 15 |
| Screen Schedule | 16 |
| Key Points | 16 |
| Create Screen Schedule..... | 16 |
| Terminal Groups..... | 16 |
| Key Points | 16 |
| Miscellaneous | 17 |
| Tenders | 17 |
| Order Screens | 17 |
| Key Points | 17 |
| Adding Screen | 17 |
| Tools and Tips | 18 |
| Button Placement..... | 18 |
| Button Arrangement | 18 |
| Shortcuts via Right Click..... | 18 |
| Planning and Preparation | 19 |
| Things to Consider..... | 19 |
| Terminals and Troubleshooting | 19 |
| Key Points | 19 |
| Terminal Manager Basics..... | 19 |
| Structure | 20 |
| Key points | 20 |

| | |
|--|----|
| Importance | 20 |
| Revenue Groups | 21 |
| Purpose | 21 |
| Key Points | 21 |
| Revenue Classes | 22 |
| Purpose | 22 |
| Key Points | 22 |
| Revenue Categories | 22 |
| Purpose | 22 |
| Key Point | 22 |
| Product Classes | 23 |
| Tax Groups | 23 |
| Menu Item Groups | 23 |
| Report Categories | 23 |
| Updating Configuration | 23 |
| Advanced Price Levels | 23 |
| Purpose | 23 |
| Process: Step 1 | 23 |
| Process: Step 2 | 24 |
| Adding a New Profit Center | 24 |
| Purpose | 24 |
| Process | 24 |
| Creating a Profit Center | 25 |
| Purpose | 25 |
| Notes | 25 |
| Productivity periods | 25 |
| Table Layouts: Part 1 - Preparation | 25 |
| Purpose | 25 |
| Process | 25 |
| Terminal Group and Transitions | 26 |
| Terminal Option Group | 26 |
| Purpose | 26 |
| Terminal Group Vs. Terminal Option Group | 26 |
| Reference Resources | 27 |
| Purpose | 27 |
| Online Guides | 27 |

Introduction

Instructor

- Name:
- Title:

Participants

- Name:
- Company:
- City:

Course Objectives

- Improve comfort level with system and navigation.
- Increase knowledge base and improve skill sets.
- Facilitate easier operations.
- Broaden your idea of what the system can do for you.

Certification

-
-

Facility Review

-

Navigation Tools

Purpose

- Navigate in the Universal Desktop (UD).
- Understand the Menus and Tabs.
- Help System.

Universal Desktop Structure Basics

Viewing Information

- Home/Start Page
- Menu Bar
- Tool Bar

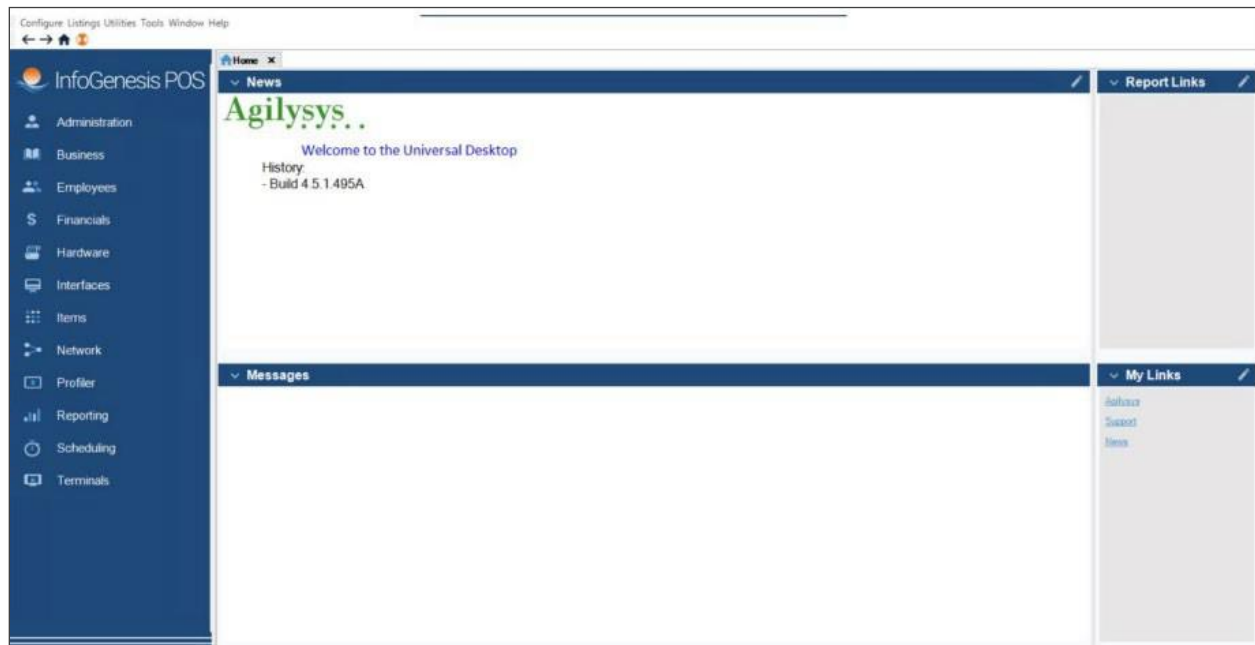
Home/Start Page

- News
- Messages
- Report Links
- My Links

Window Basics

Layout

The Universal Desktop layout screen is given below.



The menu tabs in the UD are given below:

| Field | Description |
|-----------|-----------------------------------|
| Configure | Access Configuration Elements |
| Listings | Provides Reports on Configuration |
| Utilities | Access to System Utilities |
| Tools | Access to System Tools |

| Field | Description |
|--------|---|
| Window | Access to open and close configuration tabs |
| Help | Help and UD Version Information |

Employee and Job Code

Key Points

- The ID number cannot be changed once it is saved.
- Only five fields are mandatory, and the remaining are optional.
- Enhanced security through swipe cards and/or passwords.
- Listings

Create an Employee.

- ☐ Navigate to **Employees** → **Employee**.
- ☐ Click **Add** to create an employee.
- ☐ Fill in the employee details.
- ☐ Select a Primary Job Code from the drop-down list.
- ☐ Click **Save**.

Employee Groups

Key Points

- Filter Shift and Employee Reports by Employee Groups
- These reports cannot be filtered by Profit Center so Employee Groups could be created for each restaurant in order to view reports by specific locations.

Create an Employee Group

- ☐ Navigate to **Employees** → **Employee Group**.
- ☐ Click **Add**.
- ☐ Fill in the employee details.
- ☐ Click the **Employees** tab. The Employee page appears.
- ☐ Select the required employees from the drop-down list until.
- ☐ Click **Save**.

Employees with Multiple Job Codes

Key Point

Employees who have different job descriptions or need to have different abilities at the terminal.

Create an Employee with multiple job codes

Create an employee following the instructions above.

- ☐ Navigate to **Employees** → **Employee**.
- ☐ Click the **Job Codes** tab.
- ☐ Click **Add** to add a new job code.
- ☐ Select the Job Code from the drop-down list and select additional Job Codes, as needed.
- ☐ Select **Save**.

Deleting and Terminating Employees

Key Points

- Deleting
 - ☐ Cannot delete once signed in or clocked on.
 - ☐ Could be renamed to a new employee, but this is not recommended except in special circumstances.
- Terminating
 - ☐ Takes effect automatically, without cook and reload.
 - ☐ Recommended even for extended period of absence.
 - ☐ If an employee returns to work, remove the Termination Date and the record will be reactivated.

Terminating Process.

- ☐ Go to **Employees** → **Employee**.
- ☐ Locate or select the employee that is to be removed.
- ☐ Navigate to the **Personal** tab.
- ☐ Enter or select the date in the **Termination Date** field.
- ☐ Click **Save**.

Job Code

Key Points

- Specify the abilities by Job Code.
- Ensure who is allowed to sign on to which terminal.
- Limit data viewable on employee End of Shift Reports.

Modify Job Code

- ☐ Go to **Employees** → **Job Code**.
- ☐ Click the **Functions** tab.
- ☐ Select the appropriate job code.
- ☐ Select **Edit**.
- ☐ Select or check the options that you want to be enabled.
- ☐ Select **Save**.

Beginning Configuration

Key Points

- Purpose of Profit Center Groups
- Discounts Vs. Coupons
- Purposes of Meal Periods and Check Types

Profit Centers Groups

Purpose

Limit use of Discounts and Coupons by location.

Add Profit Center Groups

- ☐ Go to **Business** → **Profit Center Group**.
- ☐ Select **Add**.
- ☐ Enter the **Profit Center Group** name.
- ☐ Click the **Profit Centers** tab.
- ☐ Select the profit center from the drop-down list.
- ☐ Repeat the previous step until all the desired profit centers are displayed in the list.
- ☐ Click **Save**.

Meal Periods

Purpose

- Additional layer of reporting based on time of the day.
- Determine which menu screens are visible based on time of the day.

Key Points

- Default Price Level and Check Type are optional, not required (discussed in detail in the Terminal Groups section)
- Meal Period Tax Reporting only for NV Entertainment Tax purposes.
- Item Receipt Prefix only for NV Entertainment Tax purposes.

Discounts and Coupons

Purpose

- Track Coupon revenue by Coupon type.
- Track use of Discounts by type.

Key Point

Restrict by Profit Center Group for higher security.

Coupons

Considered as money in financial reports.

Discounts

Can be restricted by revenue Group.

Check Types

Purposes

- Enforce Price Levels
- Automatically Assign Gratuities
- Specify Taxes
- Filter Reports

Tips, Gratuities and Service Charges

Definitions

- **Tip:** Volunteered to wait staff by guest at their discretion.
- **Gratuity:** Automatically applied to check, typically paid to the server.
- **Service Charge:** Automatically applied to check, kept by the business.

Gratuities

- Examples include large party, room service server, room service captain.
- When would you assign an **Amount Per Check?**
- Can be linked to check types.

Voids

Key Points

- Voids Vs. Comps
- Different Void Reasons
- Inventory

Purposes

- Track Inventory
- Business/Operations Analysis

Items

Purpose

- How to create Items
- Item Details
- Importance of Correct Configuration

Product Class

- Use Product Class as a template when creating new items.
- Once the Product Class is selected, the remaining fields fill up automatically.

Security Levels

- Require a specific job level in order to order an item.
- Examples:
 - Cost control for open-priced Items.
 - Ensure service standards for high-end items.

Miscellaneous Detail

- Sold by weight, e.g., candy, salads
- Tare weight: weight of container used
- SKU: Retail, Extensive Wine Lists
- Bargun Code - liquor dispensation interface codes (coordinate with your IT Department)
- Cost – for use with Margin reporting
- Covers: auto assign a cover account to each entrée
 - Recommended for Buffets
 - Other examples?

Item Options

- Prompt for Price

- Print on Check
- Not Active (86)
- Tax Included
- Discountable
- Voidable
- Allow Price Override

Item Links

Linking and Assignments Basics

- Kitchen Printers
- Price Levels
- Show Layout

Modifiers, Choice Groups and Special Instructions

Key Points

- Definitions and Uses
- Nesting and Multiple Choice Groups
- Complex Configurations

When to Use What

| Frequency | Configuration |
|--------------------------------|-----------------------------------|
| Every Time | Choice Groups and Modifiers |
| Frequently (common requests) | Special Instructions or Modifiers |
| Occasionally (unique requests) | Typed Special Instructions |

Choice Groups and Modifiers

Adding Modifiers

- ☐ Go to **Items** → **Modifier**.
- ☐ Click **Add**.
- ☐ Enter the details in all the required fields.
- ☐ Click **Add Next**. Continue adding until all modifiers are added.
- ☐ Click **Save**.

Adding Choice Group

- ☐ Go to **Items** → **Choice Group**.
- ☐ Click **Add**.

- ☐ Enter the details in all the required fields.
- ☐ Click the **Modifiers** tab.
- ☐ Select the modifiers in the drop-down list and continue until all the required modifiers are displayed in the **Modifier** list.
- ☐ Click **Save**.
- ☐ Go to **Items** → **Modifier** and select the required modifier. Click the **Show Choice Groups** tab. The **Choice Group** field appears.
- ☐ Find the created choice group in the drop-down list.
- ☐ Click **Save**.

Multiple Choice Groups

Purposes

- When an item requires that more than one question be asked.
- Example: Steak Entrée would require Meat Temp and Choice of Side.
- Some Items may require two, three or four choice groups, depending on operational need.

Process

- ☐ Create **Modifiers** and **Choice Groups** as described in the above sections.
- ☐ Locate the desired item.
- ☐ Click **Edit**.
- ☐ Click the **Choice Groups** tab.
- ☐ In the drop-down list, select the desired choice group. Continue until all required choice groups are displayed in the **Choice Groups** list.
- ☐ Click **Save**.

Nesting Choice Groups

Purpose

- When an answer to a question raises another question.
- Example: If the question (soup or salad) results in the answer *Dinner Salad*, you will need another Choice Group to determine which Dressing Choice is required.

Process

- ☐ Create **Modifiers** and **Choice Groups** as described in the above sections.
- ☐ Go to **Items** → **Modifier** and select the required modifier.

- ☐ Click **Edit**.
- ☐ Select the desired choice group from the nested **Choice Group** drop-down list.
- ☐ Click **Save**.

Special instructions

Key points

- Special Instructions inform the kitchen of customer requests that come up frequently but not on every order.
- Examples: No Dairy, Nut Allergy, Extra Sauce

Process

- ☐ Go to **Items** → **Special Instruction**.
- ☐ Click **Add**.
- ☐ Enter a name in the **Special Instruction** field.
- ☐ Click **Save**.

Meal Period Schedule

Key Points

- Rotate Screens by Time of Day
- Change/Determine Price Levels
- Change Check Types and Taxes

Assign Meal Period Schedule Times

- ☐ Go to **Business** → **Meal Period Schedules**.
- ☐ Select the required meal period.
- ☐ Click **Edit**.
- ☐ Go to the **Start Times** tab.
- ☐ Select the meal period from the drop-down list.
- ☐ Enter the appropriate start time for the required days of the week.
- ☐ Click **Save**.

Screen Schedule

Key Points

- Determines the primary screen for each day and meal period.
- Allows rotating menus.

Create Screen Schedule

- ☐ Go to **Business** → **Screen Schedule**.
- ☐ Click **Add**.
- ☐ Assign a Meal Period Schedule from the drop-down list.
- ☐ Assign the number of Rotation Weeks.
- ☐ The Start Time is displayed in the **Schedule** tab.
- ☐ Assign the Primary Screens on the **Schedule** tab.
- ☐ Click **Save**.

Terminal Groups

Key Points

- Determine Terminal Functionality
- Meal Period/Screen Schedules
- Assign Check Types, Job Codes and Tenders

Best Practice Recommendation - Create one group per type of terminal per profit center e.g., steakhouse server, steakhouse bartender, steakhouse cashier, etc.

Transitions

- Determine which screens are viewed at which times.
- Determine shortcuts for **Jump Bar** Buttons.
- Determine **Actions** for **Events**.

Factors

- Type of User (Server, Cashier, Bartender)
- Multiple Users or One-to-One Relationship
- Location Type (Single Pass, Restaurant, Fine Dining)
- Floor Plan, Check Management or Menu Screen

Miscellaneous

Tenders

Kinds of payment accepted at your property.

Updates here affect Revelation and possibly interfaced systems such as PMS or credit card. Check with your administrator before making changes.

Order Screens

Key Points

- Create order screens.
- Creating and using **Templates**.
- Naming Conventions.

Adding Screen

- ☐ Go to **Items** → **Screen**.
- ☐ Click **Add**.
- ☐ Enter the details in the **Screen Name** and **Button Text 1** and **Button Text 2** fields.

Name and Button Text

- The name should begin with an abbreviation for the restaurant.
 - ☐ Example: Corral Café Screens should be named as CC Entrees, CC Apps, etc.
 - ☐ This keeps all the screens for a restaurant together alphabetically.
- The button text should not have the name of the restaurant.
 - ☐ Example:

| Screen Name | Button Text 1 | Button text 2 |
|-------------------|---------------|---------------|
| CC Entrees | Entrees | |
| CC Soup and Salad | Soup | Salad |

Item Groups

- ☐ Click the **Item Groups** tab.
- ☐ Click **Edit**.
- ☐ Select the required item from the **Item Group** drop-down list. Repeat this step for as many groups as necessary.

Layout Options

- ☐ Click the **Layout Options** tab.
- ☐ Select the required theme from the **Theme** drop-down list (consistency – pick one and stick with it).

- Easiest/Quickest – Fargo (best font/color combo)
- Least recommended – Providence (too dark)
- If you use Santa Barbara or Flagstaff, change the font other than Comic Sans MS (most difficult to read on the terminal)

Screen Layout

- Default: Menu Items
- Other Options: Functions, Tenders, Coupons, etc.

Properties

- Change size, color, font and shape.
- Also available via right click of a button.

Tools and Tips

Button Placement

- Select a range: Select the first button, Shift, Select last.

Button Arrangement

- Move/Nudge: Ctrl and Arrow Keys
- Stretch Objects: Shift and Arrow Keys
- Lasso Multiple Objects
- Don't forget about the **Undo** button

Shortcuts via Right Click

- Quick Alignment in Rows or Columns [Align]
- Copy to Model/Paste from Model
- Make all Buttons the Same Size [Size]
- Space Buttons out Equally [Spacing]
- Change Button Name [Properties]

Planning and Preparation

Things to Consider

- What is going to make terminal operations easy and fast for your staff?
- What buttons need to be on every screen?
- Test your screens, have staff use and review and listen to their feedback
- How much will this restaurant change in the near future?

Terminals and Troubleshooting

Key Points

- Terminal End User Operations
- Terminal Manager Functions
- Understanding Hardware Basics and Care

Terminal Manager Basics

Manager Basics

Reboot Vs. Reload

- Reload Menus: Most commonly used
 - Required to update any Configuration changes
 - Can be done at almost any time
 - Probably not advisable in the middle of a 'rush' unless necessary
- Reboot: Technical, Hardware and Software Issues only

Manager Functions

- Reopen Vs. Refund Closed Checks
- Void Item Vs. Void Check

Offline Procedures

- Identify Offline Vs. Online
- Troubleshooting Offline Status
 - Is only one terminal offline? Check the network cable
 - Are all the terminals offline? Contact the IT team
- Offline Mode Functionalities
 - Create, Open and Save Checks
 - Print KP Chits locally at the terminal and run to the kitchen or bar as necessary
 - Tender to cash
 - Tender to CC (if desired)
- Return to Online Status

Hardware Basics

Cleaning and Care

- Terminal: Water only, no cleaning agents
- MSR: White cleaning cards or a regular credit card wrapped in tissue with alcohol

Receipt Printers

- Change printer paper
- Thermal Paper
- No Ribbon
- Replacing a Receipt Printer
 - Identify and resolve errors
 - Back Panel and Ports
- Customer displays
- Cash drawers

Kitchen Printers

- Replace Paper
- Replace Ribbon
- Replacing a Kitchen Printer

Structure

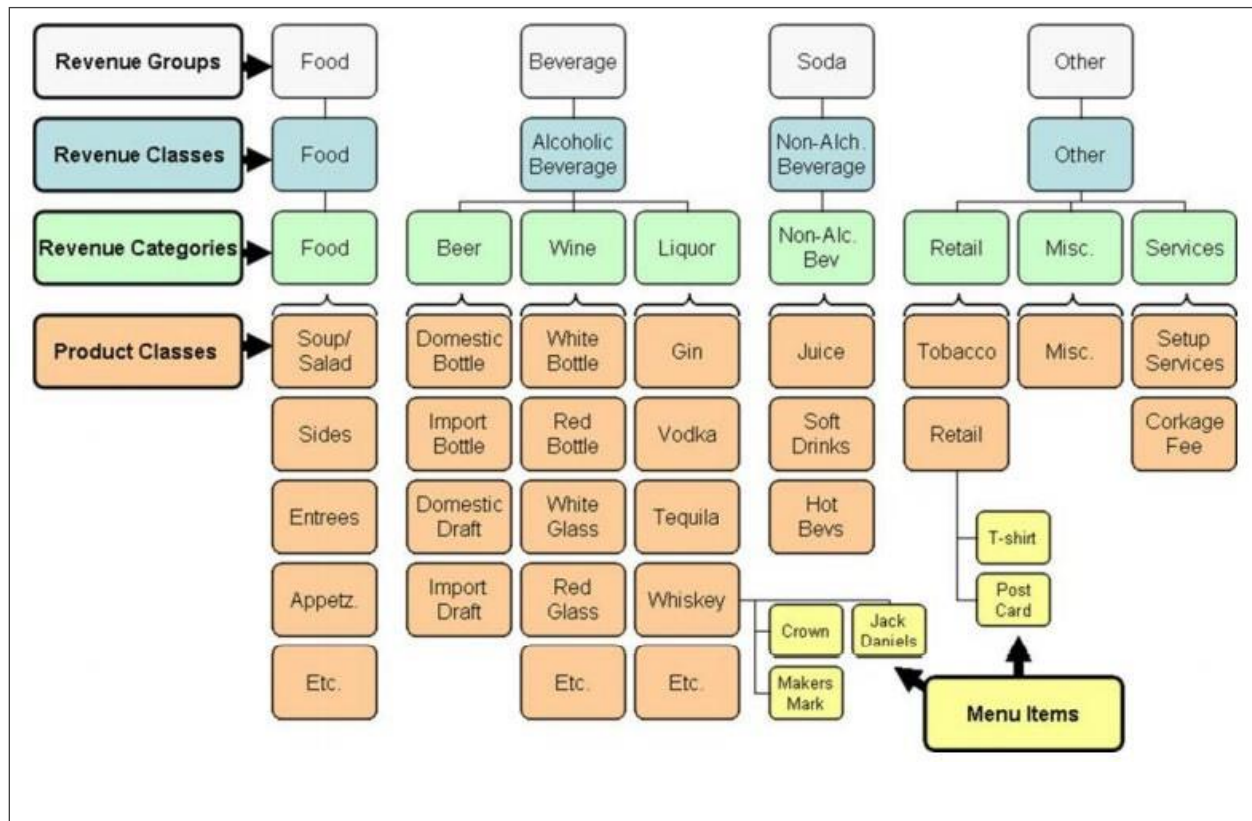
Key points

- Revenue Groups
- Revenue Classes
- Revenue Categories
- Product Classes

Importance

- Reporting Flexibility and Structure
- Understanding Advanced Configuration
- Analyzing and Organizing Configuration

The Structure represented below:



Revenue Groups

Purpose

- Limit use of Discounts
- Reporting Breakdown:
 - Server Shift Terminal Reports
 - Closed Check with Revenue Groups
 - Transaction Tag Summary Reports

Key Points

- Industry Standard - Not Changeable
- F.S.B.O.
 - Food – Food (unpackaged)
 - Soda – All non-alcoholic beverages (unsealed containers)
 - Beverage – All alcoholic beverages
 - Other – Everything else

Diagram:



Revenue Classes

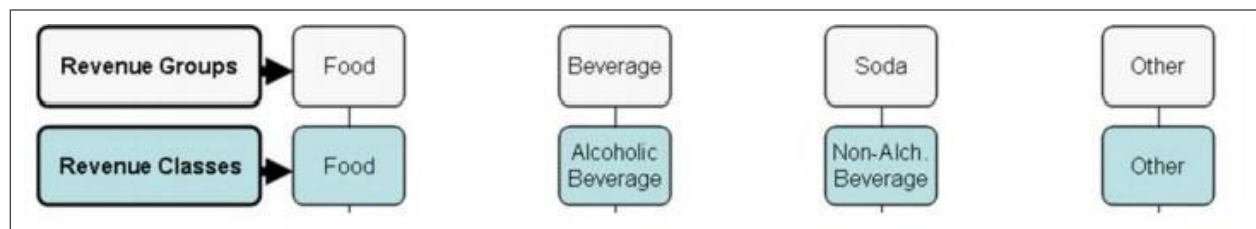
Purpose

- Group like Revenue Categories
- Accounting Reports
 - Gross Receipt Reports
 - Revenue Totals
- End of Shift Reports

Key Points

- Should mimic Revenue Groups (one-to-one relationship)
- Links Revenue Categories and Revenue Groups

Diagram:



Revenue Categories

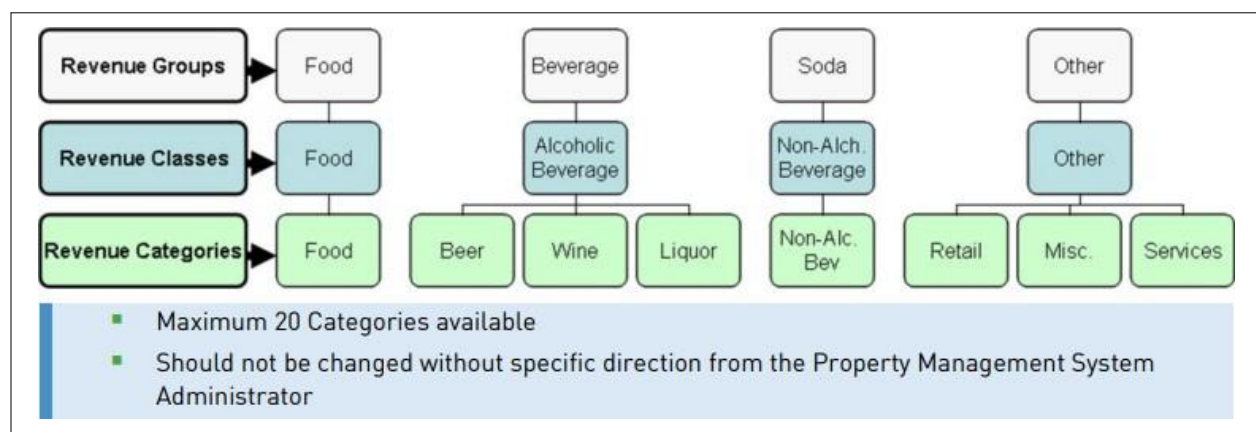
Purpose

- Accounting Reports by Revenue Category
- Interfaces with Property Management Systems

Key Point

Most frequently used by the Accounting Department

Diagram:



Product Classes

Tax Groups

Determine Primary/Default Taxation

Menu Item Groups

- Only Two Purposes:
 - Handhelds
 - Limit Items Available for Screen Configuration
- Unnecessary for any other purpose

Report Categories

- Optional Configuration
- Feature special item tracking
 - Examples: Top Twenty Sellers, Server Sales Contest
 - Viewable on Productivity Reports
- Default should be [none]

Updating Configuration

- Click **Assign** to copy current setting to all items within the Product Class.
- Useful for updating Revenue Categories and Taxes.
- Probably not recommended for other three settings.

Advanced Price Levels

Purpose

- Change Item Pricing based on:
 - Time of Day
 - Location
 - Tender Type
 - GA Type/House and Special Accounts
 - Special Events/Functions
 - Check Type
- Eliminate Duplicate Menu Items

Process: Step 1

Link only needed Price Levels to Menu Items

If a Price Level is set in another area of configuration and is not assigned to the Menu Item being ordered, the Regular Price Level will be used.

Process: Step 2

Link Price Level to other areas of configuring based on read

Check Type

- ☐ Set **Default** under **Check Type**.
- ☐ Customize by changing in **Terminal Group** → **Check Types**.

Time of Day

- ☐ Set Default under **Meal Period**.
- ☐ Customize by changing in **Terminal Group** → **Meal Period**.

Location

- ☐ Change Price Level under **Financials** → **Check Type**.

GA's, House and special Accounts

Change Price Level under G.A. Classes

Tender Type

- ☐ Change Price Level under **Financials** → **Tender**.
- ☐ Enable Terminal Option #60

Adding a New Profit Center

Purpose

- Understand each component to creating a new location.
- Know the steps to creating a new Profit Center, front to back, in Configuration.

Process

- ☐ Create a Profit Center.
- ☐ Create a Terminal Group(s)
 - More than one group may be necessary, depending upon operations.
- ☐ Optional: Create a Terminal Option Group
 - May be able to use, or copy, an existing group.
- ☐ Optional: Create a Kitchen Printer Group.
 - If Kitchen Printing is required by this location
- ☐ Create a Terminal.

- ☐ Assign all the above as necessary.
- ☐ Copy the Terminal for as many Terminals as needed in the Profit Center.

Remember: Screen Configuration is the most time-consuming aspect.
Plan your screens out in advance and assign to Terminal Groups: Meal Periods as necessary

Creating a Profit Center

Purpose

- Determine where Revenues will be Recorded.
- Create Customized Receipt Headers and Footers.

Notes

- The Profit Center ID number is critical in communication with Property Management Systems.
- Report by Revenue Category: Print Data on Shift Reports.
 - ☐ Report Shift Sales by Revenue Category instead of Revenue Groups.

Best Practice Recommendation - Keep this setting the same for all profit centers for consistency

Productivity periods

- Track Sales by Customized Time Periods
- Can be apart from Meal Periods or combining Meal Periods
- Appears on Productivity Flash Reports
 - ☐ Available on Terminal and Back Office Reports

Table Layouts: Part 1 - Preparation

Purpose

- Create quick and easy visuals of restaurant floor layout for new and existing end-users.
- Minimize training time for new end-users.

Process

- ☐ Create Tables in the Profit Center.
- ☐ Create a Table Layout under Screens (see next section).
- ☐ Select a Primary Table Layout in Profit Centers.
- ☐ Change Transitions as needed in Terminal Groups.

Time Saver: Copy tables instead of adding individually

Related Terminal Options

#300 – Allow users to create their default layout screen when they sign on to the system at beginning of shift.

Terminal Group and Transitions

- ☐ Sign On = [Primary Table Layout for Profit Center]
- ☐ Start Check = [Primary Screen for Meal Period]
- ☐ Change others to [Primary Table Layout for Profit Center] as needed.

Terminal Option Group

Purpose

- Determine Terminal Behavior
- Customize Behavior for Individual Locations
- May be Standardized across property or Customized by Individual Locations

Terminal Group Vs. Terminal Option Group

- Terminal Group control:
 - ☐ Screens Displayed
 - ☐ Tenders Accepted
 - ☐ Job Codes Available
 - ☐ Check Types Used
 - ☐ Meal Periods Used
- Terminal Option Group control:
 - ☐ Specific Terminal Functionality and Features

Reference Resources

Purpose

- Learn how to quickly find answers yourself.
- Minimize time waiting for call resolution.

Online Guides

Process

- From Configuration or Reports Module.
- Select **Help** → Online **Guides** → Select the Guide Needed.

Reference Resources

- Configuration Setup Guide
- Desk Reference Guide (Job Codes/Terminal Options)
- Reports Setup Guide (Report Group, User Periods)

Auditing Resources

- Reports Audit Guide
 - Details and Copies of each Report Available.
 - Auditing “helps” in red for ease of use, auditing tips.

Training Materials

- POS Terminal User Guide
- POS Terminal Quick Guide
 - Make your location-specific, end-user documentation.
 - Create custom documentation by **cutting** and **pasting**.
 - Great for terminals distribution or new-user training.