User Guide

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Manorsoft
Carlisle, Ontario

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Welcome

Hello and welcome to Chopstix. You're about to improve your food service take-out and delivery business by switching to a simple, fast and functional order processing system.

This book is for anyone who uses Chopstix, whether you're just beginning, have some technical experience, or have lots of expertise. It contains all the information you need to use Chopstix effectively, from the basics to special circumstances and advanced usage.

- "Part 1: Orders and Receipts" walks you through the basics of the Chopstix main terminal screen.
- "Part 2: Administration" discusses the administrative functions provided by Chopstix.
- "Part 3: Appendices" describes keyboard hotkeys, terms used within this book, and technical support information.

Document Conventions

You'll find this book easy to use if you look for these simple conventions:

- **Boldface type** indicates the name of an item you need to select.
- *Italics type* indicates new terms, book titles, or variable information that must be replaced by an actual value.
- `Monospace type` indicates an example (such as a fictitious name, or address) or text that is displayed on the screen.
- `Bold Monospace type` indicates text entered on the keyboard in response to a question displayed on the screen.
- **<angle brackets, bold>** indicates a function key or key combination on the keyboard. For example **<CTRL-P>** means hold down the CTRL key while pressing 'P'.

About Chopstix

Chopstix is a software program that can be used to improve your business by handling the entire order and delivery process from telephone number to customer and kitchen receipt. Chopstix is designed to simplify your order process, improve your customer relationships, and assist in reconciling multiple payment methods tendered by your customers.

What's New?

Everything. Chopstix has been in production continuously since December 2005, but this is the first release available to the public. Some highlights include:

- Customer database searchable by telephone number that contains not only name and address but preserves special instructions between orders.
- Order entry from your own menu with real time updates of the order total.
- Order database that preserves all posted orders including customer, individual items, and special instructions.
- Menu system capable of attaching styles, extra items, and sub items for combos.
- Receipts printed in a two column format that can be split for kitchen and customer receipt at order time.
- Complaint and Credit system that allows you to handle complaints by applying a future order credit to a customer account.
- Persistent Special Instructions can be stored by customer and print on all current and future orders.

1. Before You Begin

Before using Chopstix, you should have your point of sale terminal computer set up and running with a standard *Site Installation* provided by Manorsoft. The *Site Installation* will install the operating system and configure your terminal for use with Chopstix. All examples and instructions in this book are based on this standard configuration. For additional information on site installations please consult the *Chopstix Installation Guide*.

This chapter describes the hardware and software requirements necessary to run Chopstix and a brief overview of how to launch Chopstix on your terminal.

1.1. System Requirements

Computer

The Chopstix program runs on the free, functional & secure operating system OpenBSD. Designed to operate with minimal hardware requirements, Chopstix will run on most personal and server computers. The minimum recommended hardware requirements are as follows.

- 300MHz processor
- 64MB RAM
- 6GB Hard Disk

For your consideration, one Chopstix developer uses Chopstix regularly on a 400MHz processor with 128MB of RAM.

For more information on OpenBSD compatible hardware please see the OpenBSD Hardware Compatibility List: `http://www.openbsd.org/i386.html`.

Printer

Chopstix has simple requirements when it comes to printers: any continuous feed printer capable of printing Epson FX control codes. This will include most modern impact printers. The printer should be connected to the parallel port of your terminal computer.

Modem or Network

Some administrative features of Chopstix may require a modem or network connection to operate. If a modem is being used, it must be an hardware modem (ie. not a Softmodem or Winmodem).

Packages

Some administrative features of Chopstix are accessed through a web browser. The default browser installed in a site installation is the konquerer embedded browser.

1.2. Starting Chopstix

Logging In

Once your terminal has successfully finished starting up, you will be presented with a login screen similar to the one shown in figure 1.1. From this screen you may login to the terminal system as any configured user. Here we are going to login as the **chopstix** user.

Figure 1.1.: Chopstix terminal login screen

Your cursor will be to the right of the `Login`: prompt where you may type **order** and press <**Enter**>. The cursor will now have moved down to the right of the `Password`: prompt where you may now type your **password** and again press <**Enter**>. The password will not display while you are typing.

The initial password for the order account is located in your *Licence Package*.

Launching Chopstix

Once you have logged in, you will be presented with the system desktop. Use either your mouse or keyboard and select **Chopstix** from the desktop to start the Chopstix program.

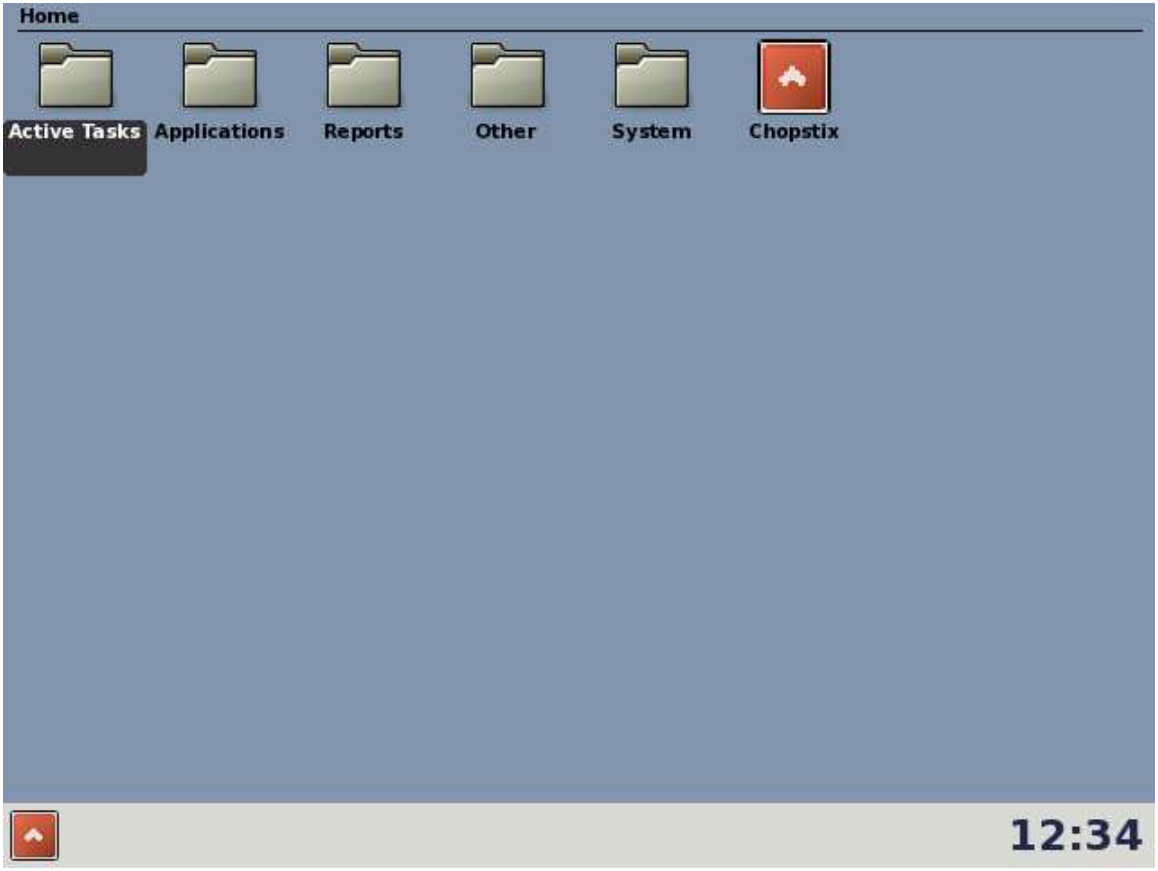


Figure 1.2.: Chopstix Desktop

Part I.

Orders and Receipts

2. The Basics

2.1. Navigation

Navigation within the Chopstix screen is accomplished using only the keyboard. Movement between fields uses the arrow, tab and enter keys.

<Up>,<Down> Move the cursor to between fields without saving any changes.

<Left>,<Right> Move the cursor within the current field.

<Tab>,<Enter> Move the cursor to the next field and store changes.

<PgUp>,<PgDn> Scroll the order entry section.

<F1> Display navigation help.

<F2> Recall customer last order.

<F3> Recall last posted order.

<F4> Change customer telephone number.

<F5> Display daily totals.

<F7> New order.

<F8> Re-Print order

<F10> Open Credit/Complaint window.

<F11> Open Discount window.

<F12> Open Delivery window.

<Ins>,<Del> Insert or Delete per-item special instructions.

<CTRL-L> Refresh screen, and clear status line.

<CTRL-P> Post order immediately

Figure 2.1.: Chopstix main screen

2.2. Main Screen

The screen shown in figure 2.1 illustrates the primary features of Chopstix. The screen is split between *Customer Details*, an *Order Entry* section, and the *Payment Details* section.

2.3. Your First Order

To illustrate the main features of Chopstix, you are going to complete the entire order process, from creating a new customer to entering menu items to posting the order and printing a receipt.

2.3.1. Customer

You:	**Thank you for calling New Cuisine, may I have your telephone number?**
Cust:	**Area code 905, 555, 1000**
You:	**This is your first order, may I have your name and address?**

The only step to creating a new customer is to enter a customer phone number. In the **Phone Number** field type:

```
Phone Number: 905 555 1000
```

Figure 2.2.: Customer details section

When you press the **<Enter>** or **<Tab>** keys, your cursor will automatically move to the next field. You may also have noticed that the **Reps** field counted and displayed the number of repeat orders by this customer. As this is a new customer, there are **0** repeats. Complete the rest of the customer details:

```
Name: John Smith
Address: 123 Fake Street
Apt: 701
Entry: 1234
Main Intersection: Main & Fake
```

Now your cursor should be in the **Deliver To** field waiting for the customer to choose a delivery method. **John Smith** does not want to drive today and chooses delivery, so press the **<D>** key. Chopstix added the full text **DELIVERY** to the field and moved your cursor to the order entry section.

2.3.2. Order

You:	May I take your order?
Cust:	I would like 2 of number 111

Figure 2.3.: Order entry section

Your cursor should now be positioned in the order entry section. Your customer seems to have a copy of your menu as he asked for a specific menu item by code. Once you have entered the **Qty** and **Code**, both the **Description** and the **Price** are retrieved from your

menu and displayed on the screen. Your cursor has been moved to the next line ready for the next item.

Press **<Tab>**, or **<Enter>** twice to move on to payment.

2.3.3. Payment

Cust:	I have a peanut allergy, please do not use peanut oil.
You:	Your total comes to $11.97, will that be cash or credit?
Cust:	Credit card number 1111 2222 3333 expiry 11/22
You:	Thank you, your order will be delivered shortly.

Figure 2.4.: Payment details section

Your customer has given you special cooking instructions, enter them now.

```
Special Instructions: Peanut allergy!
```

Once you finish entering special instructions, they are stored along with the customer details. The next time the customer orders, they will be pre-entered.

Enter the customer payment details starting with the payment type **CC** for credit card, then the number and expiry. These will be printed on the receipt.

```
CC# 1111 2222 3333
EXP 11/22
```

Your first order has been posted. The status line indicates the order number being printed, and on the line between the customer and order section the order number, date and time are displayed like this: **[15/2007-08-16 16:14:08]**. The cash helper window is provided to assist with split payments. Press **<Enter>** twice and Chopstix resets to take another order. Your first receipt has been queued for printing and should now be finished printing.

2.3.4. Receipt

Look to your printer and you should see a receipt being printed similar to the one shown in figure 2.5. Tear the receipt in two and send the first portion to your kitchen, while the second is sent to your prep area.

Figure 2.5.: Your first receipt

The first portion of the receipt prints your business name, telephone number, and address, followed by the date ordered, delivery method and order number. Use this information to package customer orders in the correct order and ensure receipts from previous days do not get mixed in.

The next portion of the receipt prints the customer name and address details including the exact time the order was posted. Use this time to ensure orders are delivered in a timely manner.

The order portion prints all the ordered items including the price. The code is also printed since one of the receipts will be used by the kitchen to cook the food.

The extras portion prints special *Item Extras* that have been attached to regular menu items. In our example, the **Chicken Fried Rice** had an *Item Extra* of number **600 Soy Sauce** attached which is printed here.

The final portion of the receipt contains the special instructions the customer requested followed by totals and applicable taxes. The Canadian tax **GST** requires printing of the business tax number on all receipts and is printed here.

That's it. Get back to work!

3. Customers

3.1. Customer Database

Chopstix includes a complete customer storage and retrieval system to simplify your order process and improve your record keeping. Using only the telephone number, Chopstix will retrieve all previously entered customer details such as name, address and order history.

Entering customer details is easy. Simply type information into the customer detail fields onscreen and press **<Tab>** or **<Enter>**. Each time you store a detail, the customer record is updated in the database. No saving or lost details.

Creating a new customer is easy, simply enter a new telephone number and a new customer detail record is created. Just fill out the details and the customer is entered into your database.

The next time the customer orders, simply enter the telephone number and all details are retrieved ready to be printed on the receipt.

3.2. Telephone Extension

For corporate clients with telephone extension numbers, Chopstix is able to store the extension alongside the main telephone number. The extension is stored as a customer detail, which means you do not need to know the extension when the customer next orders.

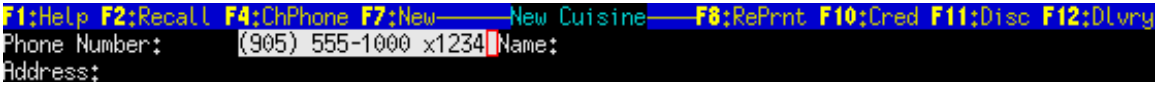


Figure 3.1.: Phone number extension

To enter an extension, move to the `Phone Number:` field and enter the customer phone number followed by optionally pressing **'x'** and entering the extension number.

3.3. Delivery

Chopstix contains many features specifically designed to assist with your delivery orders. These extra details are stored in the customer database and are retrieved with the customer record.

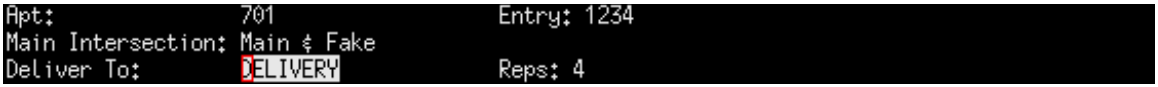


Figure 3.2.: Delivery details

3.3.1. Apartment Number

The apartment or unit number is entered separately from the address so it can be clearly printed on the receipt. Having the unit separate is easier to read and prevents the number from being lost in the address line.

3.3.2. Building Entry

The building entry detail can store additional entry instructions, automatic door entry codes, or room numbers for corporate orders. The entry code is printed separately on the receipt.

3.3.3. Main Intersection

Enter the closest intersection, major landmarks, driving directions or complex delivery instructions to assist in delivering your orders.

3.3.4. Deliver To

Chopstix offers a selection of the following order fulfillment methods:

Pickup The order was phoned in, but the customer will pick the order up.

Delivery The order will be delivered to the customer address.

Walkin The customer ordered onsite and will wait or return to pick the order up.

Void For details, see *Void Delivery* in chapter 8.2 on page 39

Without a custom business rules module, the delivery choices are used to categorize orders within the order database and for printing on the receipt. Custom business rules are able to use this choice to enable additional actions such as automatic delivery charges or discounts for walk-in customers.

3.4. Repeats

The repeats feature counts the number of orders by this customer in the order database. This allows fast and easy identification of regular and loyal customers. Use this count to reward loyal customers, or to identify new customers for first order specials. The repeat count is also printed on the receipt for you to use when cooking or packing the order.

3.5. Special Instructions

Located in the payment portion of the main screen since many special requests happen late in the order process, special instructions allow you to handle all sorts of customer requests. The text of the special instruction will be printed on both the kitchen and customer receipts. Use special instructions to remember customer preferences for cooking time, spicing, favourite flavours, allergies or diet restrictions.

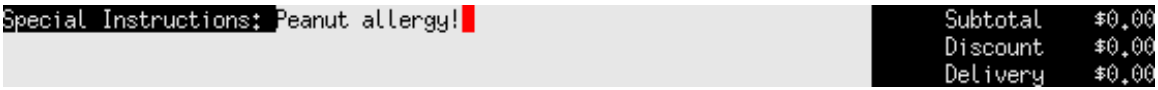


Figure 3.3.: Special Instructions

Once a special instruction is entered, it is stored in the customer database and will be retrieved with the customer record. Chopstix helps you by remembering your customer requests for you.

When you post an order with a special instruction, the text of the instruction is stored alongside the order. When you view the order at a later date, you will see special instructions as they were written at the time of order regardless of changes that have been made since.

3.6. Last Order Recall

Press the **<F2>** key to retrieve the last posted order for the current customer. The order number, date and time of order will be displayed onscreen. Each item from the original order is automatically entered into the current order allowing an immediate repeat order or changes based on the last order.

3.7. Change Telephone Number

The telephone number is the only customer detail that cannot be changed directly from the main screen. Entering a new number retrieves another customer record instead. To change a customer telephone number, press the **<F4>** key to open the `New Phone #` window and enter the new telephone number. The change is stored, and all details will now be retrieved with the new number.

3.8. Complaints and Credits

The Chopstix credit system is a powerful customer satisfaction tool that can be used to turn an upset customer into a repeat customer. When a customer has a complaint about an order, enter a credit to the customer account. Not only does the customer leave satisfied, you have avoided paying a refund, and the customer will likely return.

Figure 3.4.: New phone number window

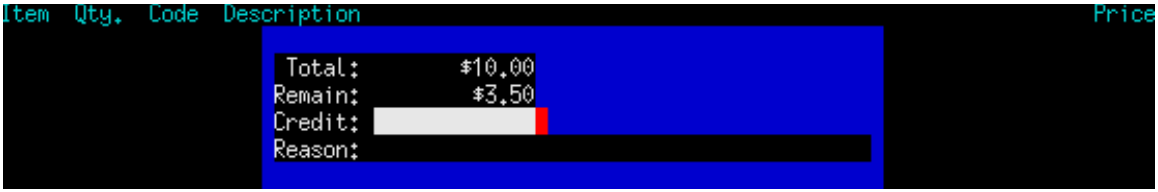


Figure 3.5.: Credit window

An account with complaints displays a complaint counter on the screen when the customer record is retrieved. This is a simple visual cue that special care may be required.

Credits are applied to all current and future orders until the credit balance is exhausted. The amount of credit remaining will be printed on the customer receipt.

3.8.1. Crediting an Account

To open the credit window, press **<F10>**. The credit window shows the total credit value applied to this account, and how much credit remains. To add a credit entry simply type the value of the credit and enter a reason for the credit.

Each credit entry is stored separately for future review, and multiple credit entries are added together. The text of the reason is stored with the credit as a helpful reminder and is available in a report.

3.8.2. Applying Credit

When a credit remains on an account, it will be automatically applied to the current order up to the current subtotal value. If the order is less than the credit value a credit balance will remain, while if the order is greater than the credit the subtotal will reflect the applied credit.

Once an order with credit applied is posted, credit will be deducted from each credit entry in order until either the remaining credit on each entry is exhausted or the total credit applied is exhausted.

3.8.3. Displaying Credit

Credits are represented on the order screen in the `Discount:` payment line, which will be replaced with either `Credit:` when a credit is being applied or `Disc+Crd:` when both a

discount and credit are applied. Credit is only applied against the value of order items, so an empty order will not display any credit.

Whenever a credit is applied, the amount of credit applied and the amount of credit remaining on the account will be printed on the receipt. See section 6.3.9 on page 33 for more detail.

3.9. Area Code Pre-Entry

To speed entry of local telephone numbers or for areas without a ten digit local dialing requirement, Chopstix can be configured to pre-enter the local area code into the telephone number entry field. The area code is entered as regular text, just as if you had typed it yourself so if you need to enter a telephone number in another area code, just use the **<Backspace>** key as you normally would.

To configure area code pre-entry see *Phone Prefix* in section 7.1 on page 37

3.10. Custom Customer Import

Entering your customer details provides an excellent way to become comfortable with Chopstix while transferring your customer list. If your customer base is extremely large, your information is already stored in an electronic format or you need assistance entering customer information, Manorsoft has many options available.

Contact us for details.

4. Orders

4.1. Order Database

Chopstix includes a powerful order database to store and retrieve every order printed or posted. A posted order stores each individual item, any styles or per-item special instructions and any price adjustment on combo subitems. Individual totals are stored for each of subtotal, discount, delivery, credit applied, taxes and the total. Any customer special instructions are posted with the order to record the instructions at the instant orderd. Orders can be retrieved in full to present accurate information in case of customer dispute or financial audit.

4.2. Order Items

An order is constructed from individual order items added to the order. Each order line contains a quantity of a single menu item. As items are chosen, the order is expanded as required. Up to four thousand items may be added to a single order. Items are chosen by code from your menu.

Figure 4.1.: Order items

4.3. Per-Item Special Instructions

Each order item may have special instruction attached to it that will be printed on the receipt. To insert instructions, press the **<Ins>** key and the entry field will be expanded below the item description. To delete an instruction from an item, press the **<Del>** key and the field will be removed. Per-item instructions will be stored with the order item when the order is posted.

Figure 4.2.: Order item with special instructions

4.4. Item Styles

An item style is a manditory choice attached to an item. When a menu item has one or more styles defined, a style choice entry is presented as a hotkey field. Once the quantity and code are entered, your cursor is moved to the selection field with the first style selected. To view available styles, press the **'?'** key. The style is chosen by typing enough letters from the name of the style to distinguish it from other styles in the selection.

Figure 4.3.: Order item style choice

For example, from the choices ("Honey Garlic", "Sweet & Sour") only the single key 'h' or 's' need be pressed. When style names are similar such as ("raw", "rare") additional keys must be pressed.

The style choice is printed on the receipt, and stored when the order is posted. Styles may also be used as selectors for custom business rules.

4.5. Item Extras

Item extras are additional unvalued items from your menu that are attached to regular items and automatically added to the order receipt upon posting. Each item extra will be printed in a section below the order items but above the totals.

Use item extras to include additional items such as condiment packets, cutlery, wipes, side orders, or any other item that must be packed with the main menu item. Extras are not shown on the order screen.

4.6. Combos and Sub-Items

Chopstix is capable of representing multiple item combinations through the use of subitems. A single main menu item contains the name and price of the combination, while each subitem

will be attached to the order upon selection. Each subitem retains all the features of the regular menu item including styles, extras, and per-item special instructions. Subitem prices are not individually displayed.

Figure 4.4.: Order item combination

4.7. Combo Item Override

Each subitem that is part of a combination may have its quantity, its item code, or both changed to override the original combination item. The total price of the combination will not be affected, but each substitution will be recorded in the order database once posted.

Figure 4.5.: Combo item override

4.8. Combo Price Adjustment

Each subitem that is part of a combination may adjust the price of the combination to account for substitution of subitems. Prices entered into the adjustment field represent the price change from the original combination. For example “$1.00” will increase the combination by one dollar, while “$-1.00” will reduce the price by one dollar.

Figure 4.6.: Combo item adjustment

4.9. Quick New Order

At any point during the order process the current order may be aborted by pressing the **<F7>** key. The aborted order will not print a receipt, nor will it be posted to the database.

A new order is started with an empty customer.

4.10. Recall Last Order

By pressing the **<F3>** key the last order posted to the database is recalled with its customer details and replaces the current order. Use this feature to redisplay an order immediately after the receipt has printed, or to reprint a receipt damaged during printing.

4.11. Custom Order Rules

Custom rules may be created to add, remove, or change the order based on your requirements. Create perpetual specials to add free items based on purchase amount, or trial new items by adding to each order free of charge. Contact us for more information.

5. Payments

Chopstix supports a full compliment of payment options to cope with both regular and special circumstances. Payment details are posted with the order for later reporting, but are not processed in any way.

Figure 5.1.: Payment section

5.1. Discount

A discount is price adjustment applied to the subtotal of an order. It may be entered as either a dollar value or as a percentage of the subtotal. To open the discount window press the **<F11>** key. Percentages can be entered by typing the numeric percentage followed by the **'%'** key. The value of a discount is posted with the order.

Figure 5.2.: Discount window

If a complaint credit is being applied to the order, the discount total will display the value of the credit being applied. If both a credit and a discount are applied, the sum of the discount and credit will be displayed.

5.2. Delivery

A delivery charge is applied to the subtotal of an order. It may be entered as either a dollar value or as a percentage of the subtotal. To open the delivery window press the **<F12>**

key. Percentages can be entered by typing the numeric percentage followed by the '%' key. The value of a delivery charge is posted with the order.

Figure 5.3.: Delivery window

5.3. Taxes

Chopstix supports two separate taxes for each order. Taxes are applied to the subtotal after adjustment for credits, discounts, and delivery charges. Each tax is calculated separately before being added to the total. Both taxes may be individually named and have an individual tax rate assigned. See *Tax* in section 7.1 on page 38.

If your jurisdiction requires the printing of tax registration numbers on customer receipts see *Tax Registration* in section 7.1 on page 38.

5.4. Payment Methods

Chopstix offers a selection of the following payment methods:

Cash Payment is in cash or coin.

Credit Card Payment is received via external credit card processing. The credit card number and expiration date along with a signature line are printed on the receipt.

Debit Payment is received via external debit or cheque card processing.

Void For details see *Void Payments* in 8.1 on page 39.

Without a custom business rules module, the payment methods are used to categorize orders within the order database and for printing on the receipt. Custom business rules are able to use this choice to enable additional actions such as automatic discounts or additional menu items to reward payment methods.

5.5. Credit Cards

When the **Credit Card** payment method is selected, the credit card number and expiry are posted with the order for later reporting. Chopstix will not process the card number, rather it acts as a notation to assist reconciling payments with multiple account statements from external processors.

5.6. Cash Helper

Once an order has been posted, a cash helper window is opened that may be used to calculate change given. The window is also opened on **Credit Card** and **Debit** payment methods to assist with split payment. Any values entered are discarded when the window is closed. The cash and change calculations are not posted with the order.

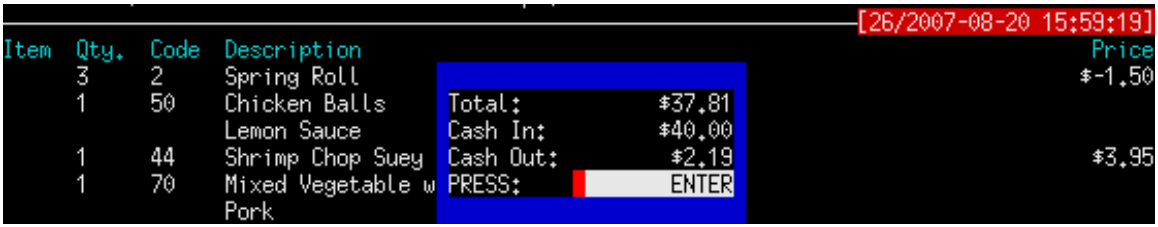


Figure 5.4.: Cash helper window

5.7. Custom Payment Rules

Custom rules may be defined to modify the credit, discount, and delivery totals based on order criteria. Use custom rules to waive delivery charges above a certain total, or to offer cash discounts for pickup. The possibilities are endless.

Contact us for details.

6. Receipts

6.1. Reprints

Order receipts may be reprinted if necessary by pressing the **<F8>** key. In conjunction with the recall features, any recent order may be reprinted in case of printer failure or damaged receipt. Each reprint is clearly marked as a reprint and does not print the original order number to prevent repeating common orders without posting to the database.

6.2. Two Column Receipts

Chopstix prints receipts in a two column format designed for use with centre perforated paper. This format creates both a customer and kitchen copy of the receipt simultaneously. Send one to the kitchen while the customer copy is sent to a packing station for assembly, or retain one copy for your daily records.

Receipts print all user entered data in UPPERCASE.

6.2.1. Customer Copy

The customer copy of the receipt contains the full order information plus a signature line if the credit card payment method is chosen.

6.2.2. Kitchen Copy

The kitchen copy of the receipt contains the full order.

6.3. Receipts in Detail

6.3.1. Business Name and Address

Your business name and telephone number are printed in a large font at the top of the receipt for maximum readability, while your street address is printed in regular font below. The city, province, and country may all be printed if required, see *Printer Show* in section 7.1 on page 38 for details.

6.3.2. Order Details

The handling portion of the receipt contains the date of the order, the delivery method and the order number. Use the order number to pack each order in succession, or pack delivery orders first to speed driver turnaround.

```
Date: 2007-08-20
Deliver To: PICKUP          Order: 26
----------------------------------
```

Figure 6.1.: Receipt: Handling

6.3.3. Customer Name and Address

The destination portion of the receipt contains the phone number, name, address, and driving directions for the customer. It also notes the order repeat count to quickly identify regular customers for special treatment. The exact order time is also located here to assist drivers with delivery guarantees if required.

```
----------------------------------
Phone # (905) 689-2001        Rep: 3
Name     MANORSOFT CORPORATION
100 HAMILTON STREET N
Apt      203      Entry: 1234
Isect    HAMILTON & JOHN
Ordered  15:59:19
----------------------------------
```

Figure 6.2.: Receipt: Destination

6.3.4. Items

The order portion of the receipt contains a list of all line items from the order including quantity, code, description and price. Order items are printed line by line from the order. Styles are printed below the item the style is defined for. Per item special instructions are printed with **'***'** to draw attention to the instruction.

6.3.5. Custom Rule Items

If custom rule items were added to the order, a blank space is added to the order section followed by the rule items in the same format as regular order items.

6.3.6. Extras

If any items extras are attached to order items, the list of extras is printed in an extras portion of the receipt. This list is merged to print each item once only. No price is printed

```
-----------------------------------
Qty   Code  Description        Price
  1      1  EGG ROLL           $1.00
  1     50  CHICKEN BALLS      $6.50
            SWEET & SOUR
  2      4  SPICY SPRING ROLL  $2.98
        ***  EXTRA SPICY
  1     51  CRISPY CHICKEN BREAST
            WITH ALMOND        $7.25
            HG
        ***  NO ALMONDS, USE
        ***  HAZELNUTS
  1    201  COMBO FOR THREE   $24.99
  3      2   SPRING ROLL      $-1.50
  1     50   CHICKEN BALLS
             LEMON SAUCE
  1     44   SHRIMP CHOP SUEY (12)
                               $3.95
  1     70   MIXED VEGETABLE WITH
             BEEF/PORK
             PORK
  1    111   CHICKEN FRIED RICE
-----------------------------------
```

Figure 6.3.: Receipt: Items

for extra items as they are included in the price of the order item.

```
-----------------------------------
  4    601  PLUM SAUCE
  2    603  MUSTARD SAUCE
  3    600  SOY SAUCE
  1    604  DRY EGG NOODLES
-----------------------------------
```

Figure 6.4.: Receipt: Extras

6.3.7. Special Instructions

When special instructions exist, an instructions portion of the receipt is printed that contains the full instructions from the order screen.

```
-----------------------------------
SPECIAL INSTRUCTIONS:
PEANUT ALLERGY!
                          --------
```

Figure 6.5.: Receipt: Special instructions

6.3.8. Totals

The totals portion of the receipt prints a subtotal followed by itemized totals for tax1, tax2, discount, delivery and credit followed by the grand total. Each line is printed only if a value exists for the total.

```
                          --------
            SUB-TOTAL       $45.17
            DISCOUNT         $5.00
            CREDIT          $10.00
            DELIVERY         $3.00
            PST              $2.65
            GST              $1.99
                          --------
            TOTAL           $37.81

     CREDIT REMAINING        $0.00
```

Figure 6.6.: Receipt: Totals and credit

6.3.9. Credit Applied

When a credit has been applied to an order, an additional line containing the balance of credit remaining is printed on the receipt.

6.3.10. Registrations

When tax registrations are set, the tax name and registration number are printed below the totals portion of the receipt.

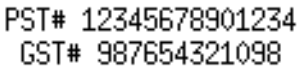


Figure 6.7.: Receipt: Tax registrations

6.3.11. Payment Method

The final portion of the receipt prints the payment method, and a signature line if required.

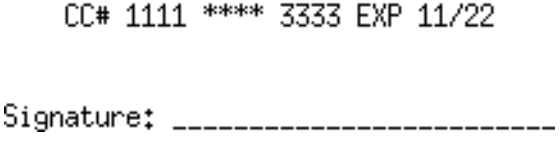


Figure 6.8.: Receipt: Payment

Part II.

Administration

7. Configuration

Chopstix configuration is located in the file `/etc/chopstix.conf` which can be changed with any text editor.

A *Site Installation* will preconfigure Chopstix.

7.1. chopstix.conf

Company Address

Set the street address to be printed on receipts. The address must match the licence certificate, with the exception of space and punctuation. When not set the street address from your licence certificate will be used.

```
company address PO Box 292
```

Company City

Set the city to be printed on receipts. When not set the city from your licence certificate will be used.

```
company city Carlisle
```

Company Name

Set the name to be printed on receipts and on the title bar of Chopstix. The name must match your licence certificate, with the exception of space and punctuation. When not set the name from your licence certificate will be used.

```
company name Chopstix
```

Company Province

Set the province to be printed on receipts. When not set the province from your licence certificate will be used.

```
company province Ontario
```

Company State

See *Company Province.*

Company Country

Set the country to be printed on receipts. When not set the country from your licence certificate will be used.

```
company country CA
```

Company Phone

Set the telephone number to be printed on receipts. This number must be contained within the telephone number of your licence certificate. For example "905-555-4444" will match the licence telephone number "+1 905 555 4444".

```
company phone 905-555-4444
```

Credit Hide

Hide the middle digits of a customer credit card number on the printed receipt. Can be set for "customer" and "kitchen"

```
credit hide customer
credit hide kitchen
no credit hide customer
no credit hide kitchen
```

Credit Signature

Set which receipt receives a printed signature line.

```
credit signature customer
credit signature kitchen
no credit signature customer
no credit signature kitchen
```

Database Module

Select the database module to use for Chopstix.

```
database module /usr/local/lib/libchopstix_sql.so.1.1
```

Database All

Select the database file the database module will use.

database all **/var/db/chopstix/chopstix.db**

Licence

Select the licence file to retrieve the licence certificate from.

licence **/etc/chopstix.licence**

Phone Prefix

Set the area code for pre-entry into the Phone Number field.

```
phone prefix 905
```

Printer

Select the command for printing.

```
printer /usr/bin/lpr
```

Printer Bold

Enable bold printing of either **title** and/or **order** portions of the receipt

```
printer bold title
printer bold order
```

Printer Columns

Change the number of columns used to print receipts.

```
printer columns 80
```

Printer Feed

Change the number of line feeds added after a receipt has printed to advance the paper to the correct location for tearing.

```
printer feed 16
```

Printer Show

Control receipt printing options for **city**, **province**, and **country**.

```
printer show city
printer show province
printer show country
```

Rule Module

Select the custom business rule module to be loaded and run by Chopstix.

```
rule module /usr/local/lib/librules_chopstix.so.1.1
```

Tax

Define tax name and rate. Chopstix supports two separate taxes.

```
tax 1 PST 8%
tax 2 GST 6%
```

Tax Registration

Define tax registration numbers to be printed on the receipt. Leave unset if no registration number must be printed.

```
tax 1 registration 1234-5678
tax 2 registration AA987654-ZZ
```

8. Accounting

8.1. Void Payments

The special payment method **void** allows the creation of orders that are not attributed to one of the defined payment methods. This allows creation of negative offset order to cancel an order without deleting the cancelled order.

The void payment method also bypasses any custom business rules that might generate extra items or discounts.

8.2. Void Delivery

The special delivery type **void** allows the creation of orders that are not attributed to one of the defined delivery methods. This in conjunction with void payments can be used to create offset orders.

The void delivery type also bypasses any customer business rules that might generate extra items or discounts.

8.3. Credit Cancellation

To cancel an account credit, you must create an offset credit with a negative balance. You should also enter a reason for cancelling the credit.

To remove all credit from an account, press **<F10>** to open the credit window, then press the minus key **'-'** followed by the amount shown to be remaining.

8.4. Daily Totals

Chopstix has the ability to quickly display a snapshot of the current daily totals for orders, taxes, and full total. To display the daily total window, press **<F5>**.

9. Menus

9.1. Menu Database

9.2. Menu Manager

The Chopstix Menu Manager allows modification of the store menu through a web interface to the local databases. If your Chopstix terminal is connected to a network, the menu manager can also be accessed remotely with your username and password.

The current menu code can be manually entered to select a previously deleted menu item.

9.2.1. List

The menu list shows a list of all current menu items. Each item line contains the item code, the name of the item, its price, any style choices defined, a list of extras and a list of subitems in the case of a combo item. Only active items are shown in the menu list. An example of the menu list is figure 9.1 on the next page.

The details of a menu item can be shown by selecting the item name, while selecting the item code allows editing of the item properties. Any extras or subitems may be shown by selecting the appropriate item from the list presented.

9.2.2. Info

Menu item information is displayed when an item has been selected from the menu list, or the item code has been manually entered into the menu manager. The full details of the item including its menu generation number and current status are displayed. An example of menu item info is figure 9.2 on page 42.

9.2.3. Edit

The menu item edit command allows modification of menu items. A menu item can be changed to correct errors, deleted to be removed from the active menu, or created which regenerates the item with a new generation number. Regeneration is used to preserve the link between existing orders in the database and the original menu item at the time of order, while changing is used to build new items or to make corrections. An example of menu editing is figure 9.3 on page 43.

The Styles, Extras, and Subitems sections of the edit display allow the change, creation and deletion of individual components of a menu item. Each component line of the display

Code	Name	Price	Styles	Extras	Subitems
1	Egg Roll	$1.00		1 x 601 Plum Sauce	
10	JUMBO PRAWN CRACKERS	$3.49		1 x 609 Fortune Cookie	
100	Singapore Rice Noodles	$8.99		1 x 602 Chili Sauce	
101	SATAY SHRIMP (12)	$11.99		1 x 602 Chili Sauce 1 x 602 Chili Sauce	
102	SATAY BEEF/CHICKEN	$8.99	BEEF CHICKEN	1 x 602 Chili Sauce 1 x 602 Chili Sauce 1 x 609 Fortune Cookie	
103	Stir Fried Beef with Green Onion/Ginger	$8.25		1 x 600 Soy Sauce	
104	The General's Chicken	$8.25		1 x 602 Chili Sauce	
105	Hunan Noodles	$9.25		1 x 602 Chili Sauce	
106	Moo Shu Vegetables (6 crepes)	$7.99		1 x 602 Chili Sauce 1 x 605 Crepes (6) 1 x 606 Hoisin Sauce	
107	Moo Shu Chicken/Beef/Pork	$8.99	Beef Chicken Pork	1 x 602 Chili Sauce 1 x 605 Crepes (6) 1 x 606 Hoisin Sauce	
108	chopsticks egg foo yong	$8.99		1 x 613 SOO GUY SAUCE	
109	egg foo yong chicken/pork/veggie	$7.99	CHICKEN PORK VEGGIE	1 x 613 SOO GUY SAUCE	
11	Pork Wonton Soup	$3.29		1 x 600 Soy Sauce	
110	Tai Dop Voy	$8.99		1 x 600 Soy Sauce	
111	Chicken Fried Rice	$5.25		1 x 600 Soy Sauce	
112	Pork Fried Rice	$5.25		1 x 600 Soy Sauce	

Figure 9.1.: Menu listing

Figure 9.2.: Menu item info

contains command buttons which affect only the individual line.

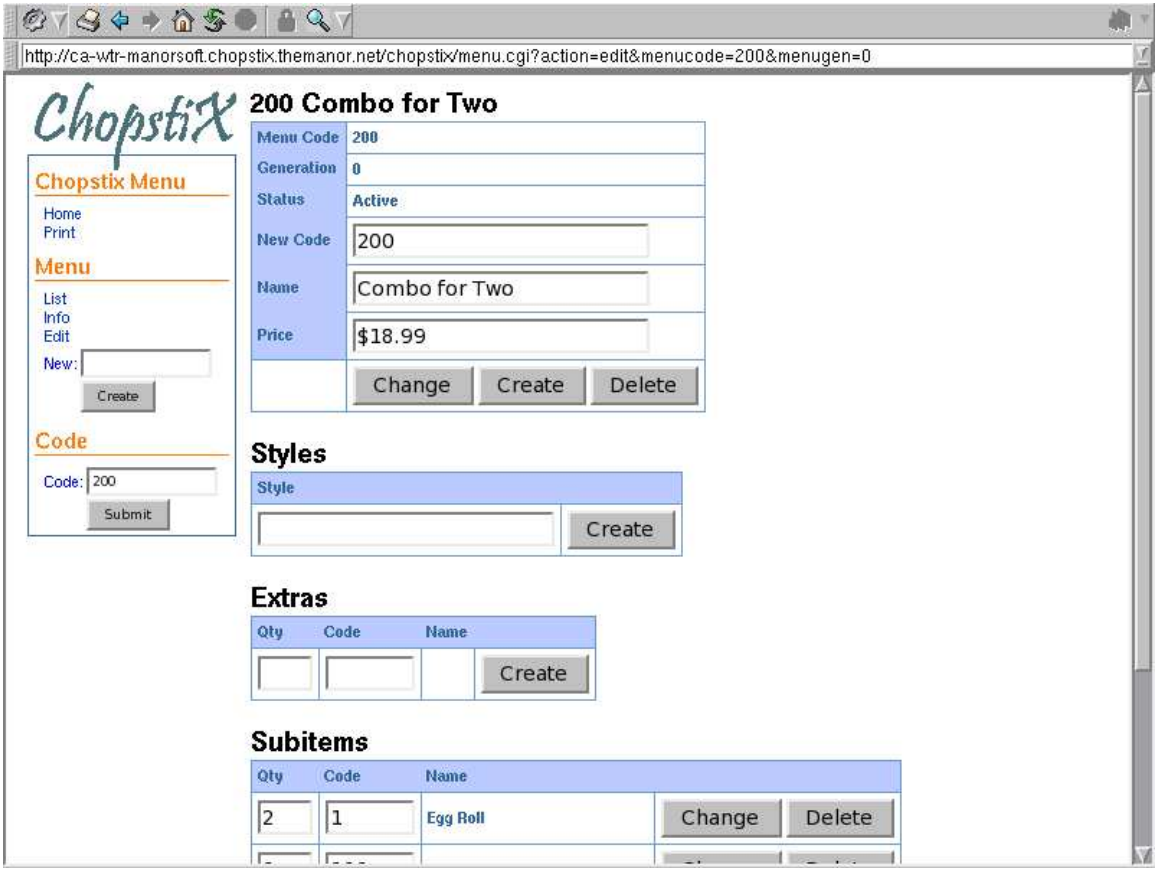


Figure 9.3.: Menu edit item

9.2.4. New

New items may be created by simply entering the desired item code and selecting Create. The menu manager will create the new item and activate the edit display. An example of a newly created item is figure 9.4 on the following page.

9.2.5. Printing

The print option redisplays the current screen in a new window in a printer friendly format. An example of a menu list for printing is figure 9.5 on page 45.

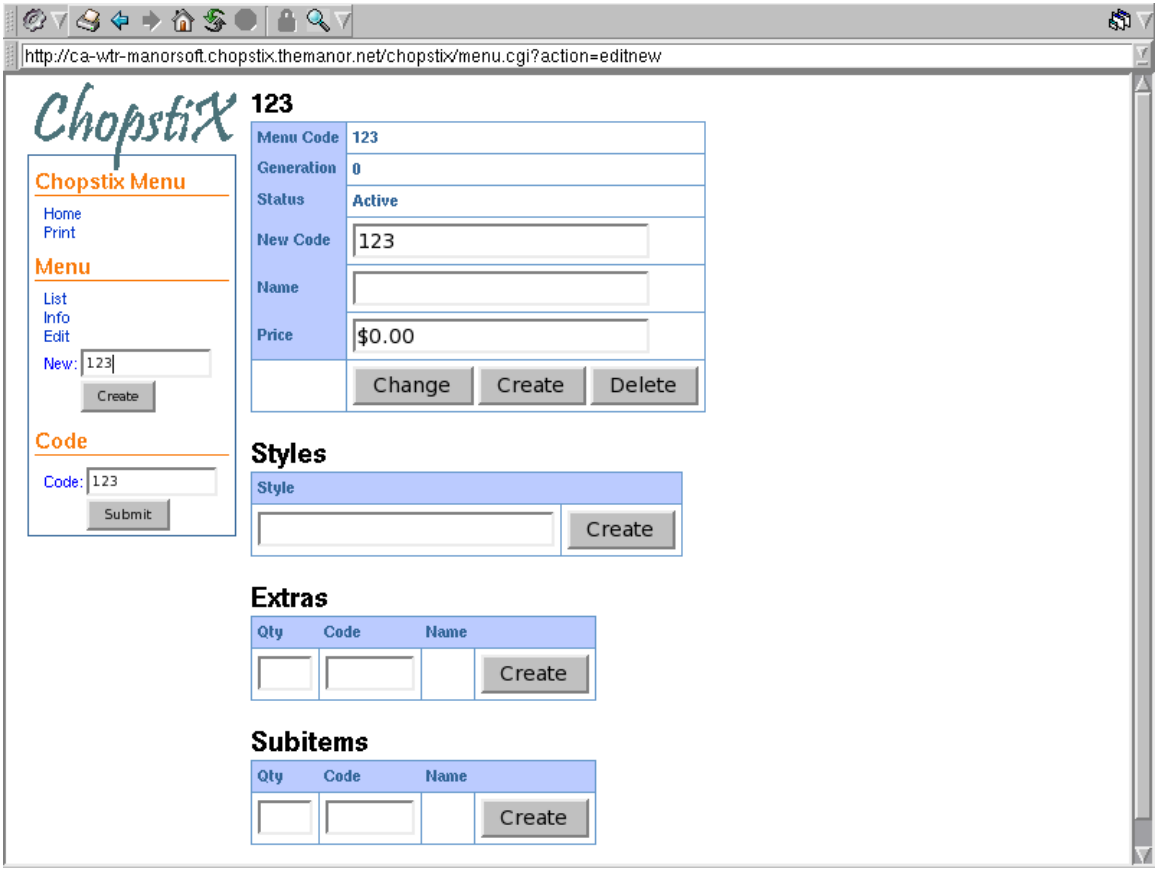
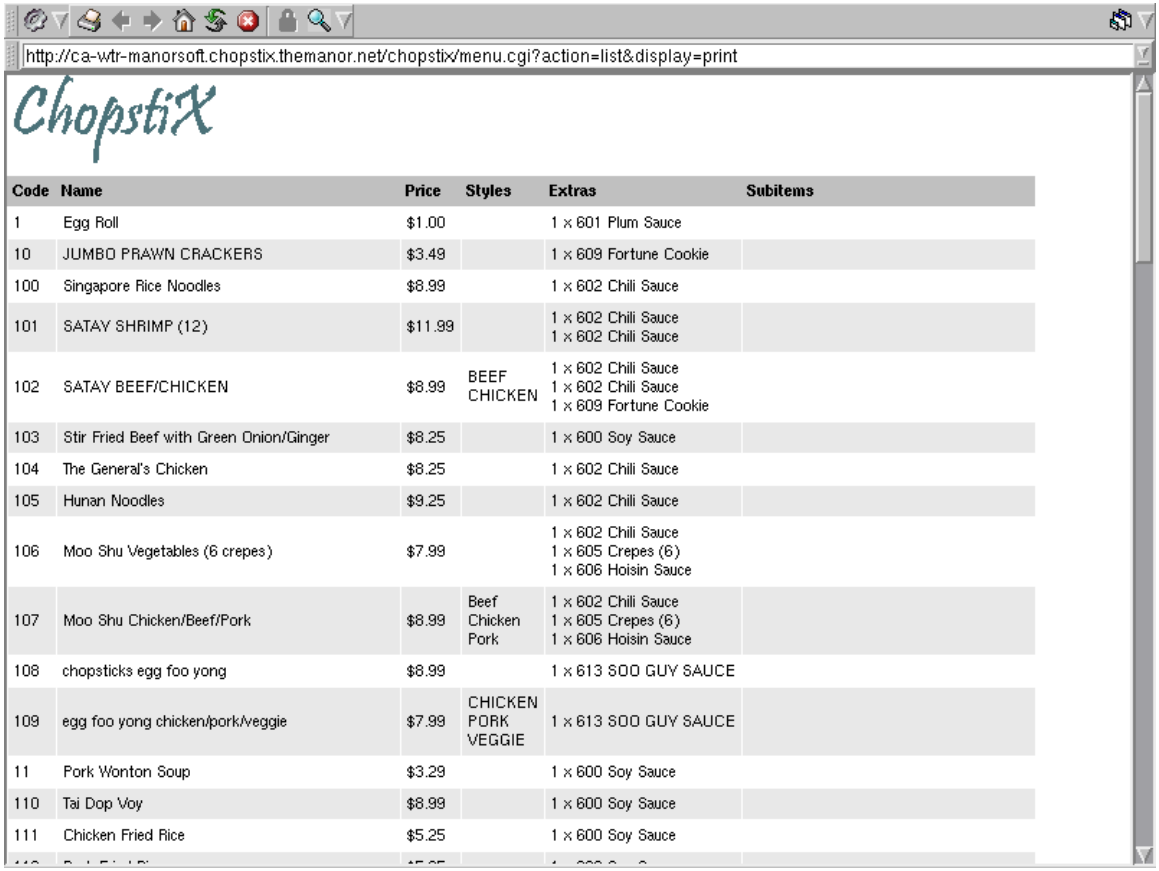


Figure 9.4.: Menu new item



Code	Name	Price	Styles	Extras	Subitems
1	Egg Roll	$1.00		1 x 601 Plum Sauce	
10	JUMBO PRAWN CRACKERS	$3.49		1 x 609 Fortune Cookie	
100	Singapore Rice Noodles	$8.99		1 x 602 Chili Sauce	
101	SATAY SHRIMP (12)	$11.99		1 x 602 Chili Sauce 1 x 602 Chili Sauce	
102	SATAY BEEF/CHICKEN	$8.99	BEEF CHICKEN	1 x 602 Chili Sauce 1 x 602 Chili Sauce 1 x 609 Fortune Cookie	
103	Stir Fried Beef with Green Onion/Ginger	$8.25		1 x 600 Soy Sauce	
104	The General's Chicken	$8.25		1 x 602 Chili Sauce	
105	Hunan Noodles	$9.25		1 x 602 Chili Sauce	
106	Moo Shu Vegetables (6 crepes)	$7.99		1 x 602 Chili Sauce 1 x 605 Crepes (6) 1 x 606 Hoisin Sauce	
107	Moo Shu Chicken/Beef/Pork	$8.99	Beef Chicken Pork	1 x 602 Chili Sauce 1 x 605 Crepes (6) 1 x 606 Hoisin Sauce	
108	chopsticks egg foo yong	$8.99		1 x 613 SOO GUY SAUCE	
109	egg foo yong chicken/pork/veggie	$7.99	CHICKEN PORK VEGGIE	1 x 613 SOO GUY SAUCE	
11	Pork Wonton Soup	$3.29		1 x 600 Soy Sauce	
110	Tai Dop Voy	$8.99		1 x 600 Soy Sauce	
111	Chicken Fried Rice	$5.25		1 x 600 Soy Sauce	

Figure 9.5.: Menu printing

9.3. Items

9.4. Extras

9.5. Styles

9.6. Combos and Subitems

9.7. Menu Generations

10. Reports

Chopstix provides reports on orders, payments, menu items, and customers through a web interface to the local databases. If your Chopstix terminal is connected to a network, reports can also be accessed remotely with your username and password.

The date range of the report can be changed by selecting a range from the menu, or manually entering a start and stop date. The default range is the current date.

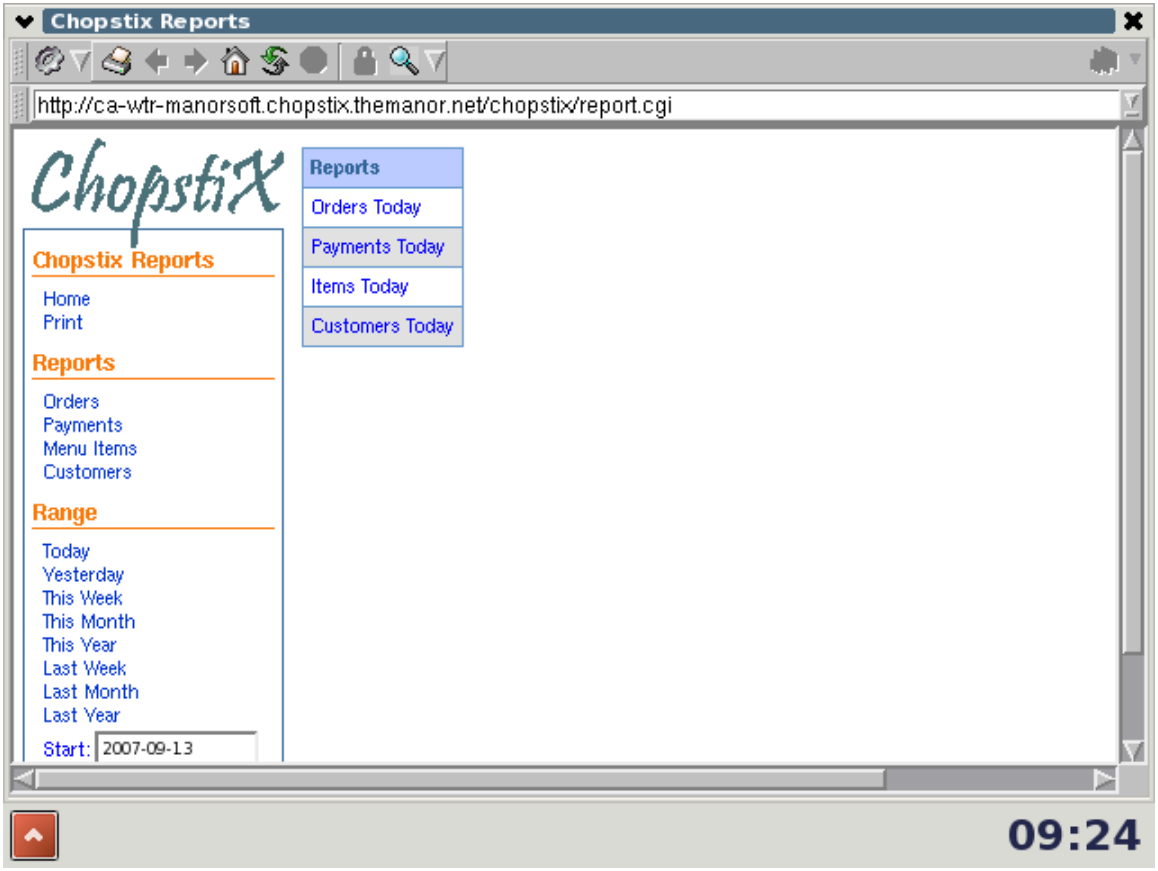
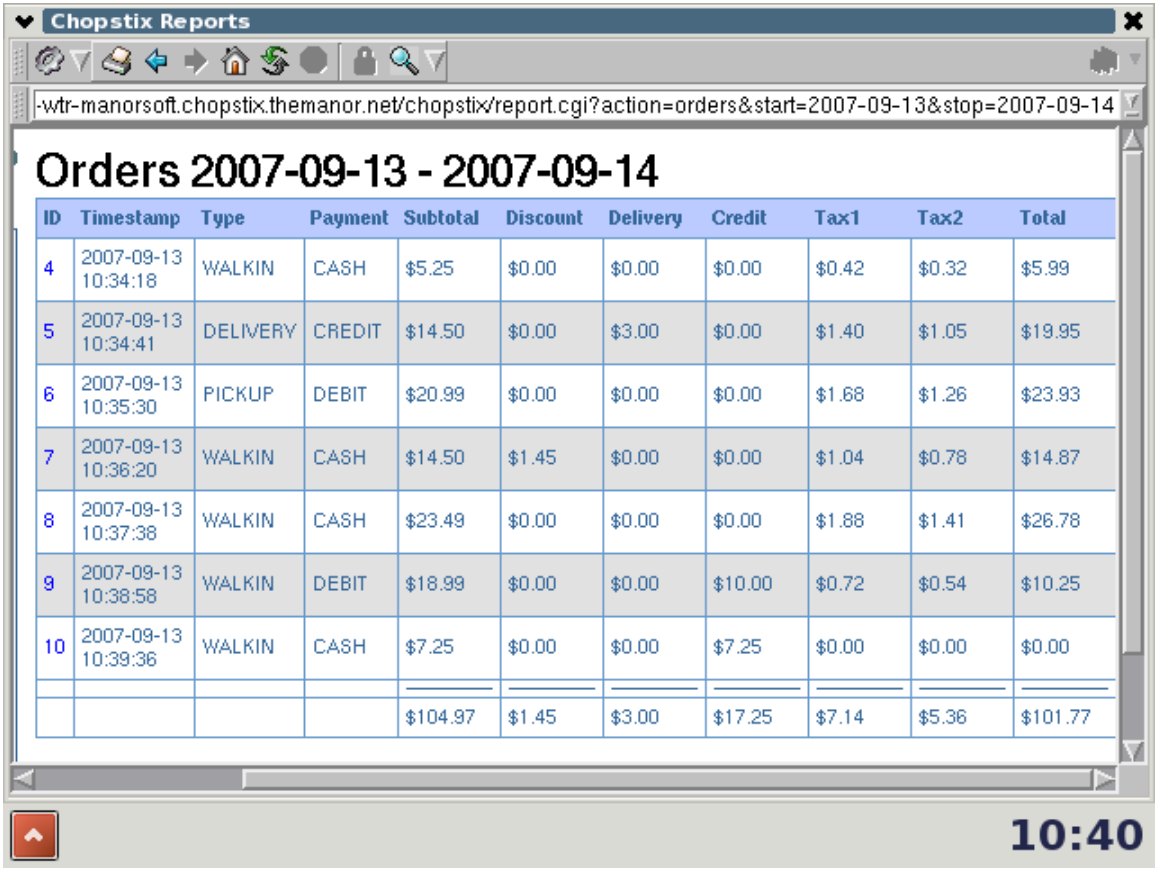


Figure 10.1.: Chopstix reports

10.1. Orders

The orders report shows a list of all posted orders within the range selected. Each order line contains the order number, the time the order was posted, delivery method, payment type and all monetary values. The final line contains the total for each of the subtotal, discount, delivery, credit, taxes, and total. An example of the orders report is figure 10.2.



ID	Timestamp	Type	Payment	Subtotal	Discount	Delivery	Credit	Tax1	Tax2	Total
4	2007-09-13 10:34:18	WALKIN	CASH	$5.25	$0.00	$0.00	$0.00	$0.42	$0.32	$5.99
5	2007-09-13 10:34:41	DELIVERY	CREDIT	$14.50	$0.00	$3.00	$0.00	$1.40	$1.05	$19.95
6	2007-09-13 10:35:30	PICKUP	DEBIT	$20.99	$0.00	$0.00	$0.00	$1.68	$1.26	$23.93
7	2007-09-13 10:36:20	WALKIN	CASH	$14.50	$1.45	$0.00	$0.00	$1.04	$0.78	$14.87
8	2007-09-13 10:37:38	WALKIN	CASH	$23.49	$0.00	$0.00	$0.00	$1.88	$1.41	$26.78
9	2007-09-13 10:38:58	WALKIN	DEBIT	$18.99	$0.00	$0.00	$10.00	$0.72	$0.54	$10.25
10	2007-09-13 10:39:36	WALKIN	CASH	$7.25	$0.00	$0.00	$7.25	$0.00	$0.00	$0.00
				$104.97	$1.45	$3.00	$17.25	$7.14	$5.36	$101.77

Figure 10.2.: Order list report

The details of an order can be shown by selecting the order number. In addition to redisplaying the order summary, this report shows customer details including any special instructions at the time of the order. Order items are individually shown, as are any items added as a result of custom business rules. An example of the order details report is figure 10.3 on the next page.

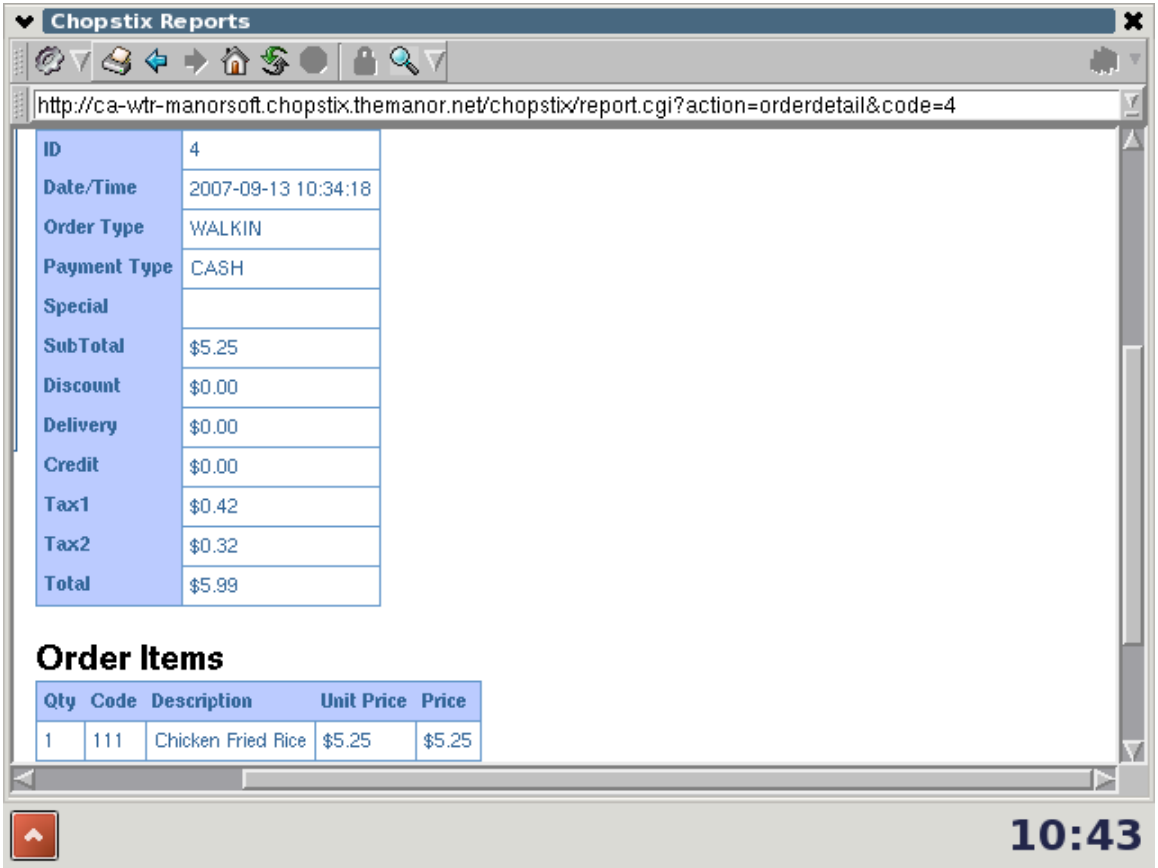


Figure 10.3.: Order detail report

10.2. Payments

The payments report summarizes all totals within the date range selected, and lists each payment method individually to assist with reconciling external payment processer statements. An example of the payments report is figure 10.4.

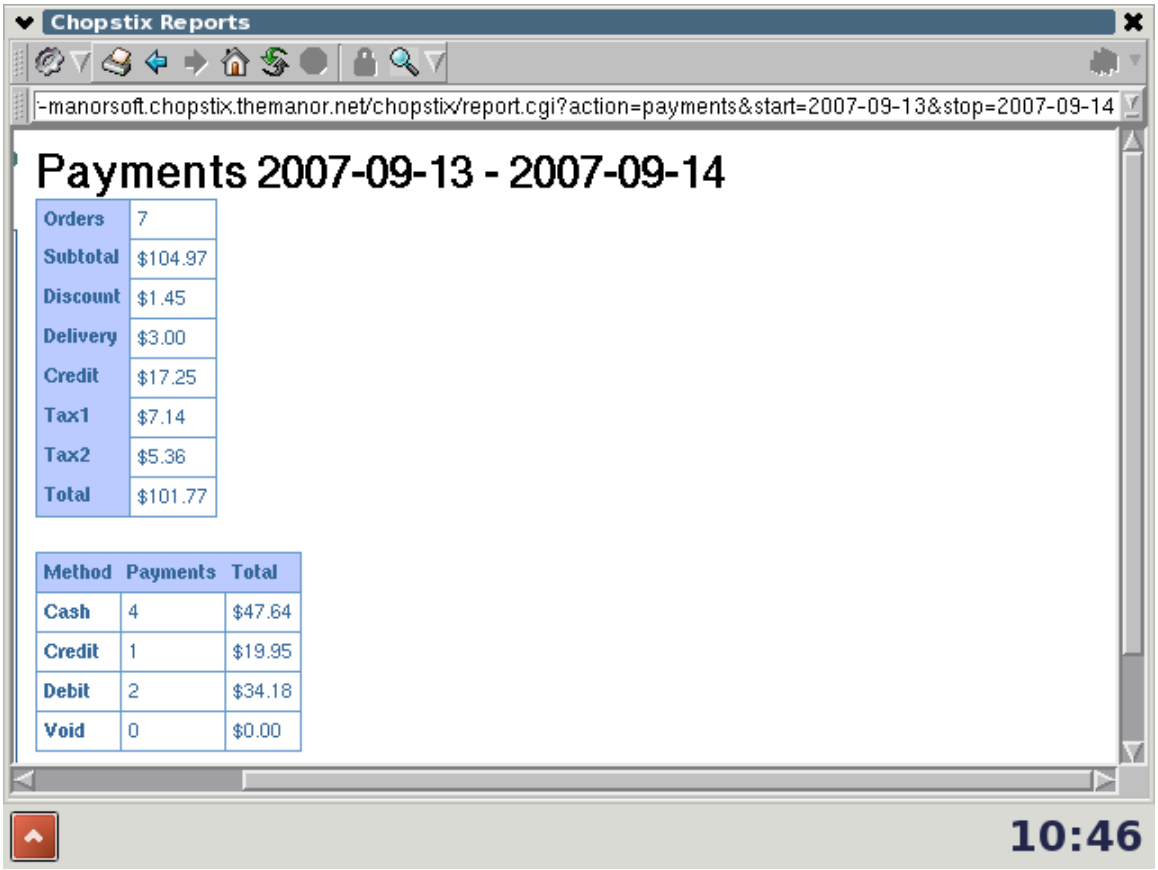
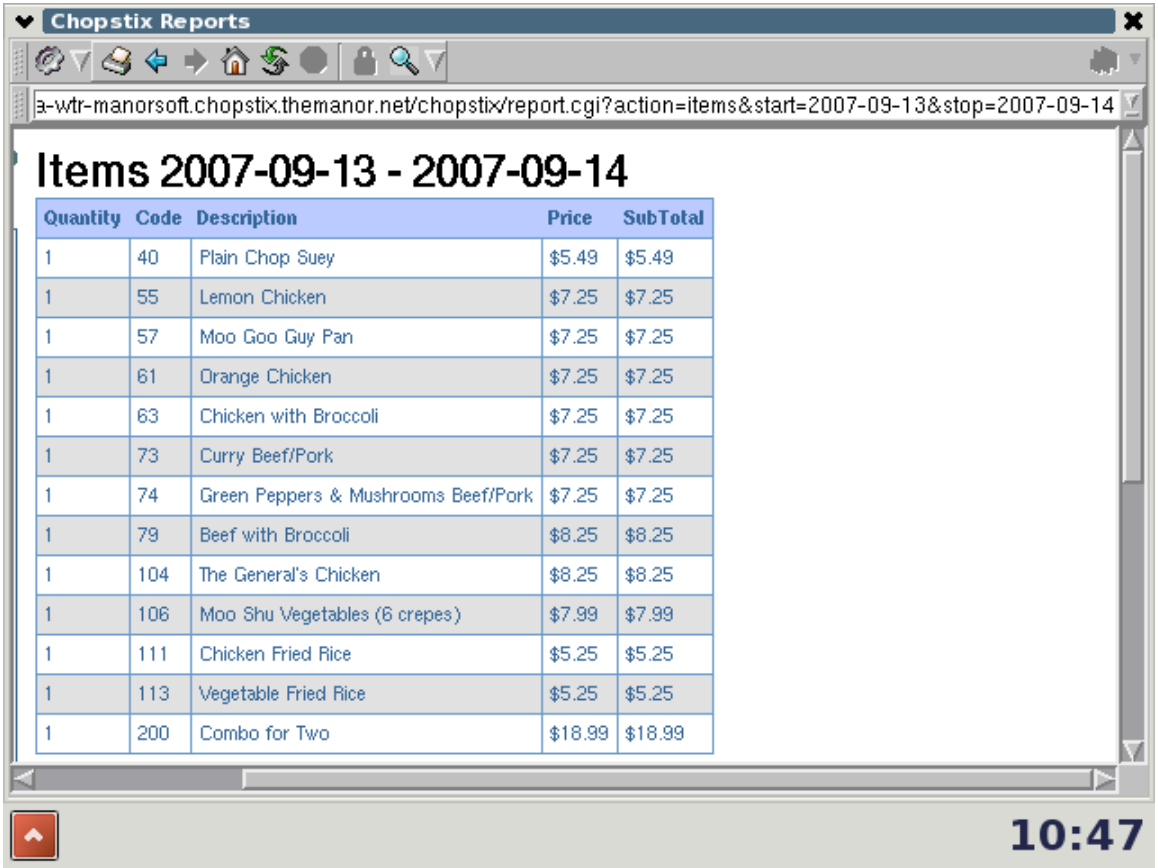


Figure 10.4.: Payments report

10.3. Menu Items

The menu items report lists all menu items ordered during the date range selected. It also lists separately all rule items added by custom business rules and all subitems contained within combo items. The subitems list totals any per-item price change for substituted items. An example of the menu items report is in figure 10.5 on the next page.



Items 2007-09-13 - 2007-09-14

Quantity	Code	Description	Price	SubTotal
1	40	Plain Chop Suey	$5.49	$5.49
1	55	Lemon Chicken	$7.25	$7.25
1	57	Moo Goo Guy Pan	$7.25	$7.25
1	61	Orange Chicken	$7.25	$7.25
1	63	Chicken with Broccoli	$7.25	$7.25
1	73	Curry Beef/Pork	$7.25	$7.25
1	74	Green Peppers & Mushrooms Beef/Pork	$7.25	$7.25
1	79	Beef with Broccoli	$8.25	$8.25
1	104	The General's Chicken	$8.25	$8.25
1	106	Moo Shu Vegetables (6 crepes)	$7.99	$7.99
1	111	Chicken Fried Rice	$5.25	$5.25
1	113	Vegetable Fried Rice	$5.25	$5.25
1	200	Combo for Two	$18.99	$18.99

Figure 10.5.: Items report

10.4. Customers

The customers report lists all active customers within the date range selected. It lists phone number, name, address, number of orders and total order value. An example of a customers report is figure 10.6.

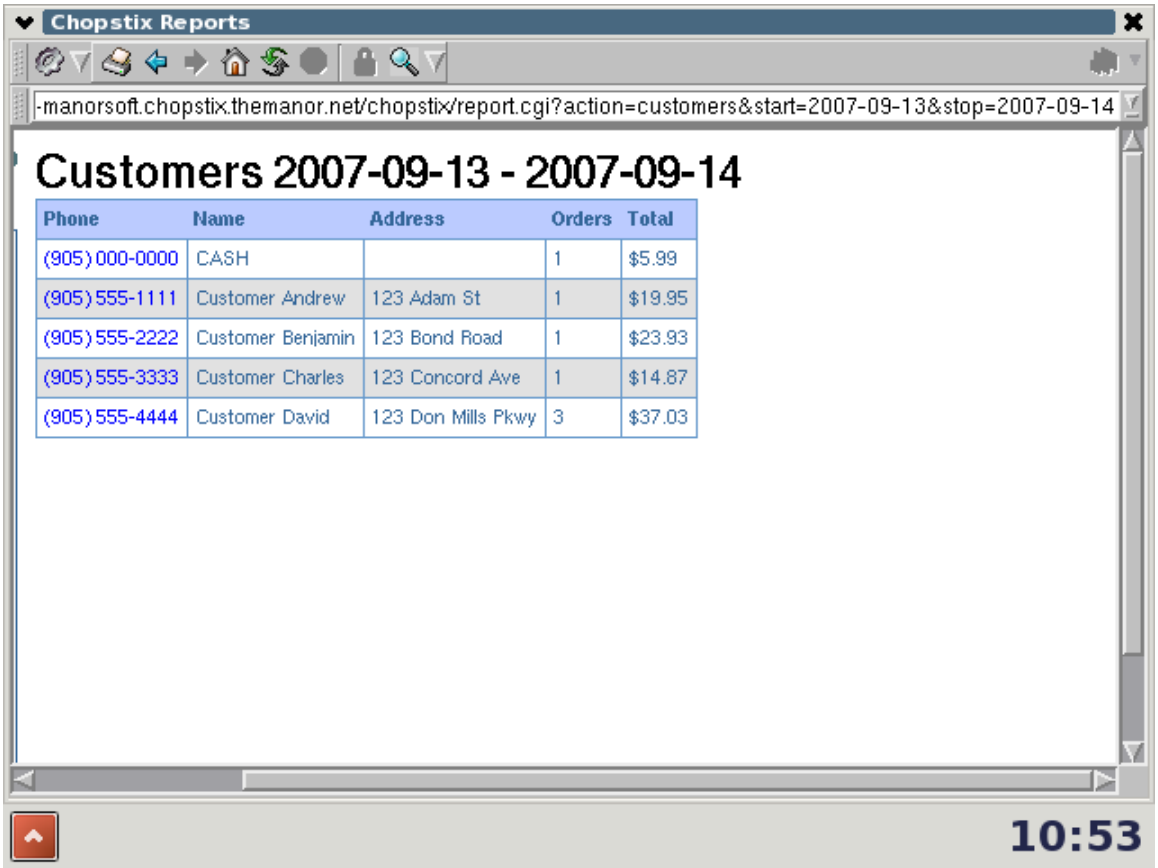


Figure 10.6.: Customer list report

Selecting a customer phone number shows the customer details including a list of all credits applied to the account and the amount of credit remaining on the account. An example of customer details is figure 10.7 on the next page.

10.5. Printing

The print option redisplays the current report in a new window in a printer friendly format. An example of an order list report for printing is figure 10.8 on page 54.

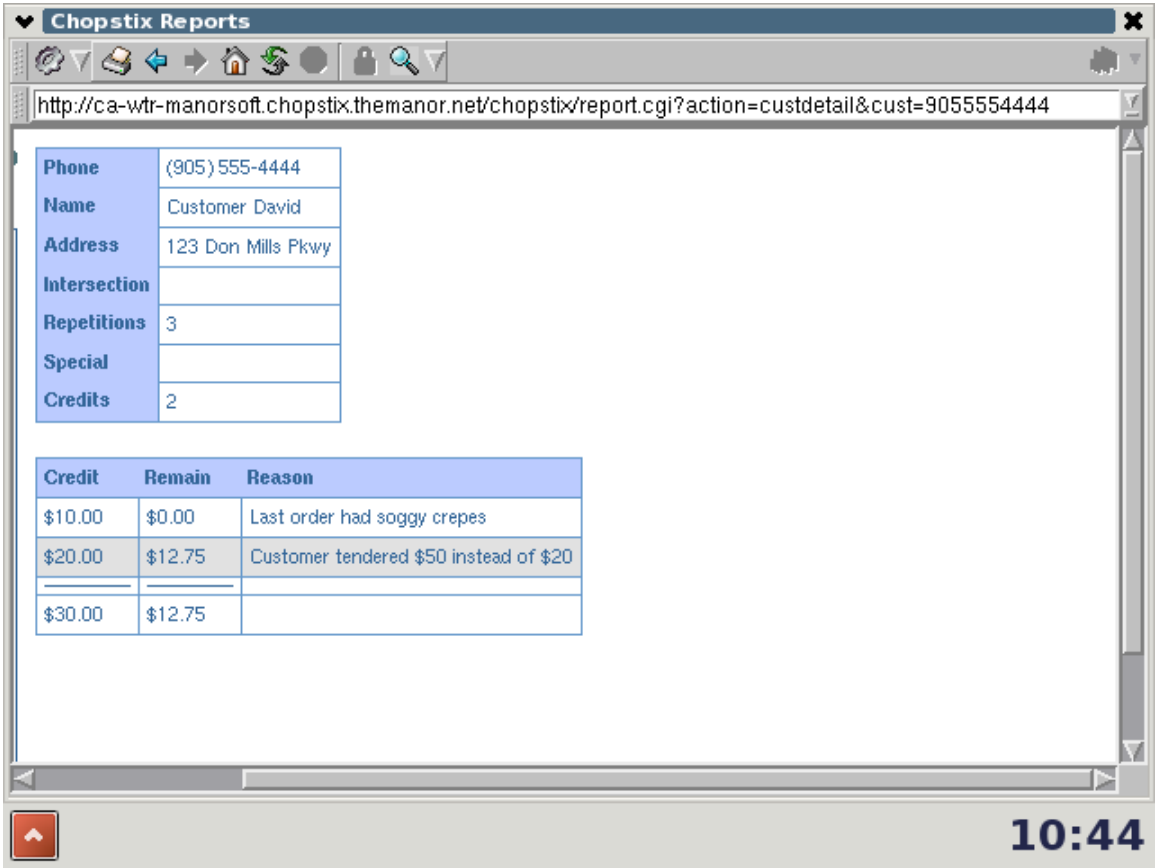


Figure 10.7.: Customer detail report

ID	Timestamp	Type	Payment	Subtotal	Discount	Delivery	Credit	Tax1	Tax2	Total
4	2007-09-13 10:34:18	WALKIN	CASH	$5.25	$0.00	$0.00	$0.00	$0.42	$0.32	$5.99
5	2007-09-13 10:34:41	DELIVERY	CREDIT	$14.50	$0.00	$3.00	$0.00	$1.40	$1.05	$19.95
6	2007-09-13 10:35:30	PICKUP	DEBIT	$20.99	$0.00	$0.00	$0.00	$1.68	$1.26	$23.93
7	2007-09-13 10:36:20	WALKIN	CASH	$14.50	$1.45	$0.00	$0.00	$1.04	$0.78	$14.87
8	2007-09-13 10:37:38	WALKIN	CASH	$23.49	$0.00	$0.00	$0.00	$1.88	$1.41	$26.78
9	2007-09-13 10:38:58	WALKIN	DEBIT	$18.99	$0.00	$0.00	$10.00	$0.72	$0.54	$10.25
10	2007-09-13 10:39:36	WALKIN	CASH	$7.25	$0.00	$0.00	$7.25	$0.00	$0.00	$0.00
				$104.97	$1.45	$3.00	$17.25	$7.14	$5.36	$101.77

Figure 10.8.: Printable order list report

Part III.

Appendix

A. Keyboard Shortcuts

<Up>,<Down> Move the cursor to between fields without saving any changes.

<Left>,<Right> Move the cursor within the current field.

<Tab>,<Enter> Move the cursor to the next field and store changes.

<PgUp>,<PgDn> Scroll the order entry section.

<F1> Display navigation help.

<F2> Recall customer last order.

<F3> Recall last posted order.

<F4> Change customer telephone number.

<F5> Display daily totals.

<F7> New order.

<F8> Re-Print order.

<F10> Open Credit/Complaint window.

<F11> Open Discount window.

<F12> Open Delivery window.

<Ins>,<Del> Insert or Delete per-item special instructions.

<CTRL-L> Refresh screen, and clear status line.

<CTRL-P> Post order immediately.

<ALT-C> Launch Chopstix.

<ALT-D> Choose the desktop.

<ALT-M> Choose the menu.

<ALT-N> Choose next application.

<ALT-P> Choose previous application.

<ALT-R> Launch command shell (rxvt).

<ALT-X> Launch command shell (xterm).

<ALT-TAB> Choose next application.

<ALT-SHIFT-TAB> Choose previous application.

<ALT-F4> Close application.

<CTRL-F11> Fullscreen.

<CTRL-ALT-F1> Switch to the console login display.

<CTRL-ALT-F5> Switch to the graphics display.

<CTRL-ALT-Backspace> Forcefully terminate the video display server, and all running applications including Chopstix.

<CTRL-ALT-Numpad+> Increase display resolution.

<CTRL-ALT-Numpad-> Decrease display resolution.

B. Glossary of Terms

Custom Business Rules Module The basic functionality of Chopstix can be extended through the use of a custom business rules module that is loaded by the program.

Customer Database The tables within the main Chopstix database that store all customer details and special instructions.

Database A collection of information records that is stored in a computer.

Extra See *Menu Item Extra.*

Item See *Menu Item*

Licence Certificate The Chopstix program requires a licence to operate which is provided as a text file containing the certificate.

Licence Package When you purchase Chopstix, you will receive a package containing a *Licence Certificate*, *Manorsoft Account*, and an initial password for your *Site Installation* accounts.

Manorsoft Account Your Manorsoft username and password provide access to the customer section of the Manorsoft website at http://www.manorsoft.ca.

Menu Database The tables within the main Chopstix database that store all menu items, styles extras, and subitems used in combos.

Menu Item A representation of a real item offered for sale including a name, item code and price.

Menu Item Extra An unvalued item attached to another menu item or menu subitem that is automatically attached to an order receipt without being displayed onscreen.

Menu Item Style A choice of one or more options for the preparation of a menu item.

Menu Subitem An unvalued item that is attached to another menu item for the purpose of building a combination item.

Order Database The tables within the main Chopstix database that store each and every order that is posted. All individual order items are posted at order time with style, price, and special instructions to be retrieved later if required.

Site Installation The standard installation of operating system, configuration files and software packages necessary for Chopstix to operate.

Style See *Menu Item Style.*

Subitem See *Menu Subitem.*

Table A matrix or grid of data arranged in rows and columns.

C. Technical Support

Manorsoft offers many support options to meet your individual business needs and help you get the most out of your software investment. Basic support is included with the purchase of a Chopstix Site Licence and then you can choose additional options.

Basic Support

Basic Support covers the Chopstix program and its administration only. All licenced users of Chopstix automatically receive basic support with the purchase of a Chopstix Licence Certificate.

- Chopstix program upgrades for a period of one (1) year from the date of purchase.
- Online support available at **http://www.manorsoft.ca/support/**
- E-Mail support through **support@manorsoft.ca**.
- Telephone support for installation issues only for a period of ninety (90) days from the date of purchase. In the US and Canada call **(905) 865-8754**.

Extended Support

Extended Support is available at an additional charge for Chopstix, the host operating system OpenBSD, general networking, and custom software solutions. Please contact Manorsoft for details and pricing.

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