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SOFTWARE (INFORM)

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HARDWARE

SOFTWARE (INFORM)

to log into windows use user ID:crew and password:crew

To log into InForm type your user number, press 'enter', type your password and press 'enter'.

This training packet will cover eight major functions including cash management, human resources, labor management, inventory management, pos functions, reports, toolbox, and kitchen system.

HUMAN RESOURCES

HOW TO EDIT AN EMPLOYEE FILE

To change the status of an employee you must log into InForm and make the following selections:

1. Click the 'Human Resources' module
2. Click 'File Change'
3. Click the employee name to select file to be changed
4. Click 'Accept'

This will take you to the 'Change Existing Employee' screen. You will have the option to change, leave, wage/job, availability, security/access, termination, and general information.

NEW HIRE AND TRAINING MODE

To add a new employee you must log into InForm and make the follow selections:

1. Click the 'Human Resources' module
2. Click the 'New Hire' option
3. Type the new employees social security number
4. Click 'Accept'
5. Enter employee information

When creating new employee (cashier) 'Allow Tender' and all profit centers (Dine, Togo, Drive Thru) must be enabled. If an employee is unable to tender check setting to make sure 'Allow Tender' and all profit centers are enabled.

TRAINING USER

There will be a fake employee named 'Training' available to train and familiarize new employees with the POS system. The training employee can not tender checks and orders made using the training employee will not show up on the kitchen displays.

INVENTORY MANAGEMENT

There are two options to choose from when entering counts or invoices, ‘Accept’ or ‘Park’. Press ‘Park’ to save changes and edit at a later time. Pressing ‘Park’ will not finalize your invoice or count. Pressing ‘Accept’ will finalize your changes. After the invoice/count is accepted, you are no longer able to make changes.

ENTERING COUNTS

To enter daily/weekly counts you must log into InForm and make the following selections:

1. Click the ‘Inventory’ module
2. Click the ‘Physical Inventory’ option
3. Click on the count to be entered
4. Click the ‘Open Count’ option
5. When entering count is complete, click ‘Accept’

When entering your count you must enter a value in each field. If there is no quantity for an item you must enter a zero in that field. This increases accuracy and you cannot accept a count if there are blank fields.

ENTERING INVOICES

Invoices must be entered during current week

To enter invoices you must log into InForm and make the following selections:

1. Click the ‘Inventory’ module
2. Click the ‘Inventory Adjust’ option
3. Click the ‘Receive’ option
4. Click the ‘Receive Purchase Order’ option
5. Verify all information is correct
6. Double check all entries, if all entries are correct click ‘Accept’

There may be a message that appears stating that the cost of the invoices do not match. If this is the case you must double check and verify the invoice information.

PRINT COUNT SHEET

To print a count sheet you must log into InForm and do the following:

1. Click the ‘Inventory’ module
2. Click the ‘Physical Count’ option
3. Click a day or week count
4. Click ‘Accept’
5. Click on the box next to ‘Sort By:’ to open drop down menu
6. Click the ‘Location’ option
7. Click the ‘Print Count Sheet’ option
8. Click the small printer icon located near top/left of screen
9. Verify printer information and click ‘OK’

CASH MANAGEMENT

<u>CLOSING CASH DRAWER (DRAWER PULL)</u>

When closing a drawer, all sales information for that individual cashier will be included even if cashier has used two drawers.
To close a cash drawer you must first do the following:

Step 1. Drawer Bleed

1. Log into the cash drawer (terminal)
2. Press ‘Managers Functions’
3. Press ‘Drawer Bleed’
4. Count cash drawer down to $75.00, and enter remaining amount to bleed
5. Enter Cashier number

Step 2. Close Drawer

1. Log into cash drawer (terminal)
2. Press ‘Managers Functions’
3. Press ‘Drawer Pull Cashier’
4. Press ‘OK’

Step 3. Balance Drawer

1. Log into InForm
2. Click the ‘Cash Mgmt’ module
3. Click the ‘Cash Accounting’ option
4. Click on the appropriate drawer pull
5. Click the ‘Balance’ option
6. Enter the actual cash amount (Enter zero, drawer bleed to $75.00 was done)
7. Click ‘Accept’

ENTERING PAID OUT (CREDIT CARDS)

Paid out for credit cards are only done when using separate credit card machines. To enter paid out you must log into InForm and do the following:

1. Click the ‘Cash Mgmt’ module
2. Click the ‘Cash Accounting’ option
3. Click on a drawer pull
4. Click on ‘Paid in/ out’

   There are five fields (In/Out, Vendor, G/L number, Invoice#, Amount) each with a drop down menu
5. Click on the box next to ‘In/Out’ and select ‘Out’
6. Click on the box next to ‘Vendor’ and select ‘Credit Cards’
7. Click on the box next to ‘G/L number’ and select Credit Cards’
8. Click in the ‘Invoice’ field and enter the your user number
9. Click in the ‘Amount’ field and enter the amount of paid out
10. Click ‘Accept’
11. Click ‘Reconcile’ to update information

LABOR MANAGEMENT

CHECK LABOR

To check labor cost log into InForm or counter terminal and do the following:

1. Click the 'Flash Reporter' Module
2. Click the 'Labor Metrics'
   (You will see a bar graph displaying the labor metrics)
3. Click the 'Details' option for detail labor cost information

Or

Log into InForm and to the following:

4. Click the 'Reports' module
5. Click the 'Cash Mgmt' option
6. Click the 'Sales Recap' report
7. Select the appropriate day or week
8. Click 'OK'

This report shows sales information as well as labor costs details

TIME CLOCK AND EDITING TIME PUNCHES

To check the time clock and edit time punches you must log into InForm and do the following:

1. Click the 'Labor Mgmt' module
2. Click the 'Time Clock' option
3. Select either a date or range of dates
4. Click 'Accept'

You can check the time punches or edit a time punch by doing the following:

5. Click the time punch you wish to edit
6. Click the 'Edit/Detail' option
7. Type the corrections in the appropriate fields
8. Select an edit reason from the 'Edit reason' drop down menu
9. Click Accept

If two employees have the same name you must include their employee number to the end of their last name, i.e. Alex12, Jose7.

SCHEDULE

Create an employee schedule by logging into InForm and completing the following:

1. Click ‘Labor Mgmt’
2. Click ‘Scheduler’
3. Click on a date to create a schedule for that date
4. Click ‘ Schedule’
5. Click on the employee you are making the schedule for
6. Double click to the right of employee name under starting time
7. A red bar appears, move the cursor onto the right end of the bar.

   Or

   Double click the red bar and a window will appear allowing you to type in the schedule manually. If entered manually skip step 8.
8. Press and hold the left mouse button down and drag the end of the bar to the ending shift time.
9. When schedule is complete, click ‘Accept’

There are tabs above the scheduler representing each day of the week. To create a schedule for these dates, click on the tab and repeat steps 5-8.
Print an employee schedule by logging into InForm and completing the following:

1. Click ‘Labor Mgmt’
2. Click ‘Schedule’
3. Click ‘Schedule Print’
4. Select either, ‘Weekly Schedule- All Employees, Weekly Schedule-One Employee, or Daily Schedule-One Employee’
5. Click ‘Print’
6. Verify printer information
7. Click ‘OK’

CLOSE PAY PERIOD

Closing the pay period **MUST** be done every Tuesday morning. Close the weekly pay period by logging into InForm and completing the following:

1. Click ‘Labor Mgmt’
2. Click ‘Time Clock’
3. Click ‘Pay Period’
4. Click ‘Accept’
5. Verify all payroll information is correct, if edit information to make corrections
6. Click ‘Close Pay Period’ when all information has been verified to be correct
7. This is what payroll will need in order to process payroll

POS FUNCTIONS

GUEST QUERIES

To find information on a previous check you must log into InForm and do the following:

1. Click the ‘POS Functions’ module
2. Click the ‘Guest Checks’ option near left of screen
3. Click the ‘Queries’ option
4. Click on ‘Detail for actual order to view

   Or

   Use scroll bar located to the very right of the screen to search for check

You can also choose different dates by doing the following:

1. Click the ‘POS Functions’ module
2. Click the ‘Guest Checks’ option near left of screen
3. Click the ‘Queries’ option
4. Click the ‘Filter’ option located near top of screen
5. Click the ‘Vertical Filter’ tab
6. Click on the downward pointing arrow near the ‘From Date’ field to make a drop down calendar appear
7. Click on the day you wish to check
8. Click ‘Finish’

SETTLE CREDIT CARD BATCHES MANUALLY

Settling credit card batches manually must be done ONLY if the batch was declined for that day (check batch report for declined status)

To settle credit card batches manually, log into InForm and do the following:

1. Click the ‘POS Functions’ module
2. Click the ‘Credit Card Upload’ option
3. Click ‘Next’
4. Click on the downward pointing arrow near the ‘Charges Business Date’ field to make a drop down calendar appear
5. Click on the day you wish to settle
6. Click on the ‘Process Charges’ option

The batch/settlement process may take up to nearly five minutes depending on network traffic and the size of the batch. In most cases when the ‘Credit Card Upload’ option is pressed, the program will automatically select the last unprocessed settlement date.

REPORTS

PRINTING REPORTS

To print reports you must log into InForm and do the following:

1. Click the ‘Reports’ Module
2. Click on a report field (i.e. Cash Mgmt, Human Resources, Inventory Mgmt)
3. Click the report which you will print
4. Select the date of the report
5. Click ‘OK’
6. Click the ‘Print’ option located near bottom of screen.
7. Verify printer information
8. Click ‘OK’

PRINTING DAILY/WEEKLY GROUP REPORTS

To print daily or weekly group report you must log into InForm and do the following:

1. Click the ‘Reports’ module
2. Click the ‘Report Groups’ option
3. Click either ‘Daily Reports’ or ‘Weekly Inventory Reports’
4. Select the date for the reports
5. Click ‘OK’ (All reports for daily and/or weekly will print)

TOOL BOX

The toolbox contains all options you will need. Five of these options are, 'CKE Order Sheet, Close Day, Deposit Form, PC Anywhere, Change of Status and WordPad.
To fax the order sheet, log into InForm and do the following:

1. Move the mouse cursor to the far right of the screen to make the tool box appear
2. Click the 'Order Sheet' option
3. Complete the order sheet
4. Click on the printer icon

   Or

   Click on 'File' then 'Print' option
5. Select the 'Fax' option located in the 'Select Printer' window
6. Click 'Print'
7. Click 'Next'
8. Click on the 'Address Book' option
9. Click on 'CKE Orders' From the contacts list
10. Click on the 'To' option
11. Click 'OK'
12. Click 'Next'
13. Click 'Next', keep default settings **(Cover sheet not needed)**
14. Click 'Next', keep default settings
15. Click 'Finish'

After clicking on finish, a window will appear displaying the status of the fax. Make sure fax was sent successfully.

KITCHEN SYSTEM

<u>KITCHEN DISPLAY SYMBOLS</u>

There are four main kitchen symbols. The symbol and its meaning are shown below:

SYMBOL	MEANING
<	Lite
x	Extra
-	No
+	Add

<u>CHANGING KITCHEN DISPLAY ROUTING</u>

To change between high volume and low volume routing, log into a front terminal and do the following:

1. Press the ‘Managers Functions’ option
2. Press the ‘Change Routing’ function
3. Press the routing scheme you wish to select (High Volume, Low Volume)
4. Press ‘OK’

<u>BUMP ORDER</u>

Use bump order if an order is frozen on the monitor and cannot be bump using the bump bar. To bump an order you must log into a counter terminal and do the following:

1. Click ‘Next Page’
2. Click ‘Managers Functions’
3. Click ‘ Bump an order’
4. Type in the order number to be bumped (order numbers found on monitor above tent # to the right of register #, i.e. T0022 is order 22, T0104 is order 104)
5. Click ‘All Videos’
6. Click ‘Done’

*When using Bump Bar to recall past order, hit Recall and the order will appear in right bottom corner. If order is too large for one pane hit scroll button to view the rest of the order

<u>RESET VIDEO</u>

Use the reset video only when all orders are frozen on one or more kitchen videos. To reset video you must log into a counter terminal and do the following:

1. Click ‘Next Page’
2. Click ‘Managers Functions’
3. Click ‘Reset Video’
4. Click ‘All Videos’
5. Click ‘Done’

RESTARTING YOUR POS SYSTEM

There may be times you may have to restart you POS system, i.e. helpdesk request, system crash. If this is necessary you must follow the instructions below.

1. Press the [CNTL, Alt, Del] keys located on the keyboard (see picture below).

2. Click on the ‘Shutdown’ option
3. Click on the pull-down menu and select the ‘Restart’ option
4. Click ‘Ok’
5. Shut down all cash terminals by pressing and holding the power button located on the bottom of the cash terminals.
6. After the back office computer restarts, press the power button on the bottom of the cash terminals again to start terminals.

If the mouse and keyboard are not working push and hold the power button down until computer shuts down. Only do this if the mouse and keyboard are not working. The process takes approximately 5 minutes.

Hardware

What is a PC or a computer? A device that can store, retrieve, and process data. The back office PC is a large black and gray box with a silver 'Dell' logo on the front. The power button on the computer is located on the center of the front of the computer. **Never** turn power off unless instructed by helpdesk. To shutdown or restart the PC do the following

Press these keys at the same time [Cntl, Alt, Del]
Click on 'Shutdown'
Click on the downward pointing arrow
Click on 'Shutdown' or 'Restart'
Click 'OK'

What is a Power Var or a Backup/APC? A device which eliminates power spikes and unexpected power outages. This device appears to be a small box with several power outlets and could be either black or beige. If a power outage occurs, this device will allow the terminals and back office computer to be properly turned off without transaction and order data being lost or damaged.

What is a Modem? Modem (modulator/demodulator) is a small black box with red lights on one end and cable connections on the opposite end. A modem makes it possible to do credit card transaction, system updates, and helpdesk support. There should be three cables connected to the back of the modem, power cord (left arrow), phone cord (center arrow), and serial cable (right arrow).

What is a receipt printer? A terminal printer is an electronic device attached to the terminal that generates paper receipts. Terminal printers are small dark gray box-like devices located next to each counter terminal and one near the drive-thru window.

Checking receipt printer errors; On the PAR terminals there will be a small, [System Status] icon near the bottom of the screen. If this icon appears to be flashing there is a system error. Press this icon to view the status of terminals, printers, or other system devices. If a printer is not working properly, check the cable connections on the printer. Also, make sure connections leading to the terminal and power outlets are firmly plugged in. Check the cables for damage and make sure the power to the printer is turned on. Open the printer by pressing the button on the right side of the printer and make sure there is paper in the printer, and that there are no paper jams. **Turn the power off and hold down the [Feed] button as you turn the power on again.** The paper should automatically print. Press [Feed] again to print a long character sheet. If this character sheet prints and appears to print all characters with no errors then the printer is working properly.

Checking cable connections; If you are checking Ethernet cables (network cables) there are most likely green or yellow lights at or near the plug that will light up and blink when a good connection is established. You may have to inspect the pins to make sure there are no crooked, bent or broken pins. If there are screws on the plug, make sure the screws are appropriately screwed into the jack. If there are no screws, make sure the plug or cable is completely inserted and firmly seated in the jack or outlet. Also, inspect the cable for any possible damages.

Do you know what a Mouse is? A mouse is a small device with two buttons and a thin cord connecting it to a PC. The mouse controls the movement of a cursor located on the screen. If you move the mouse left, right, up or down the cursors movement will move in the same direction on the screen. To make selections using the mouse, move the cursor over the selection and click on the selection by pressing and releasing the left mouse button. There are options available that will require you to click twice (double-click) to select it. To do so just press and release two times quickly over the selection. Some selections have extra options available that can be accessed by dragging the mouse over the selection and clicking using the right mouse button.

Do you know what a keyboard is? A keyboard is used to input numbers, letters, and symbols into fields on the monitor. Take time to familiarize yourself with the layout of the keyboard. Some keys on the keyboard have two items displayed, one above the other. Press the shift key to input the item that is above the other. Pressing shift as you type letters will capitalize the letter.

Do you know what a radio and an amplifier are? A radio receives a signal from a radio station and sends it to either a speaker system or an amplifier. A amplifier increases the radio signal power to be used with the dining room music system. Both the amplifier and radio are large black boxes with located on the top shelf of the back office. The Amplifier is used to control volume in the store. (Top: Radio; Bottom: Amplifier)

What is a monitor? A monitor is large T.V. like device with a large screen. A monitor is located at each of the cook/ prep stations (dine cook, drive-thru cook, dine center post, drive-thru center post, Drive-thru pass out, fryer).