menumate®

# POS:201

## Essential Managers Guide to Menumate Point of Sale

## Contents



## Copyright

# Setting up Staff

***or changing their current setup***

To start make sure you are on the main start screen of Menumate. It Should have P.O.S , Cash Drawer, Time Clock etc... going down the right hand side of the screen. Any time you see the Login screen, enter your code.

1) Press **Maintenance**.
2) Click on **Staff**.
3) To add a new staff member press **Add**.
4) Click on the Blue button under the heading **Name**. Enter the name and press Ok. See Figure 1.
5) Do the same for **Initials**.
6) Next we put in their pin number. Press **Set PIN number**, and enter a 2 – 8 digit pin, press ok and enter it in again, press ok.

> If you want to have the staff members to swipe a card to login or use a wrist tag then press Swipe Card for the card option and Proximity Card for the wrist tag.

7) Last of the mandatory things is setting what the staff member has access to. Press the button **None Assigned**. See Figure 2.
8) Down the bottom of the Screen are some pre-sets but you can pick on the individual options to make a custom setting. The pre-set ones are Administrator (everything), Supervisor (manager), Sales (able to sell and that's all) and none. We will go through all the different settings in more detail on the next page.
9) Press Ok to finish.

> You can use a payroll system with Menumate. Click on the Payroll Interface, see Figure 1. Put in the Payroll ID and press ok. The Payroll ID should come from your Payroll system.

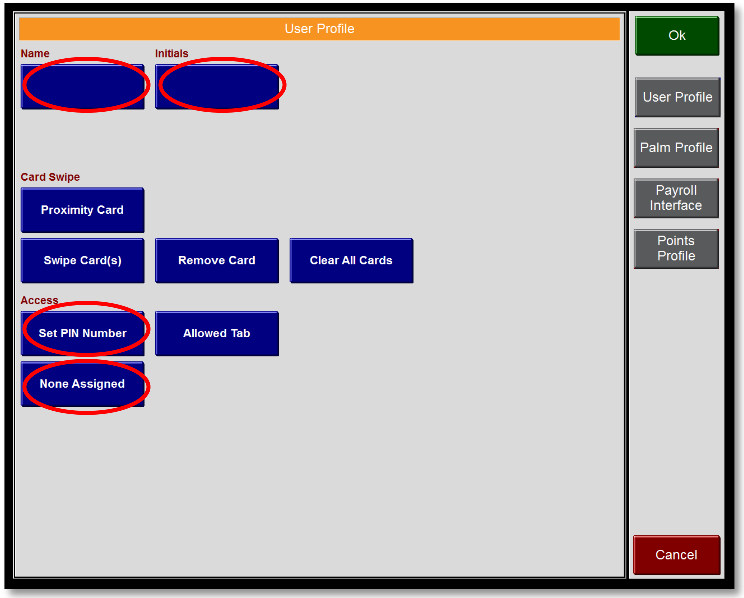


Figure 1

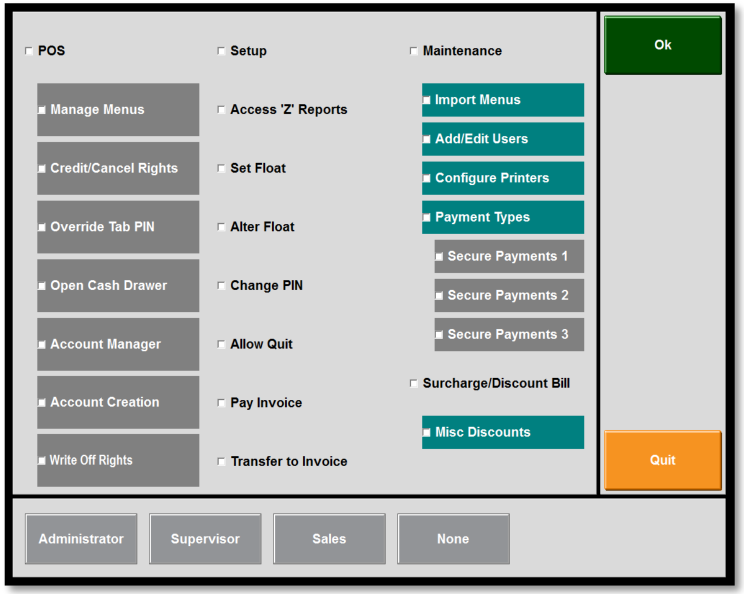


Figure 2

## Setting up Staff

***or changing their current setup***

Here is a description of what each of the security options do.

**POS** : Give access to sell things and use the basic point of sale

**Manage Menus**: Lets you turn off items in the menu that are out of stock or no longer used. This will just grey them out so they can't be used.

**Credit/Cancel Rights**: Lets you credit or cancel sales.

**Override Tab PIN**: Tabs can have a PIN number on them from security. The PIN stops things being put on the tab or being paid off. With this ticked you don't need to know the PIN number.

**Open Cash Drawer**: You can open the cash drawer without doing a sale.

**Account Manager**: Lets you edit tab details. Add a credit, put in a PIN number, lock the tab etc...

**Account Creation**: Create a tab at time of sale.

**Write Off Rights**: Gives the right to do a write off or wastage.

**Setup**: Access to the setup screen from the Menumate main start up screen.

**Access 'Z' Reports**: Able to do the end of the day cash up.

**Set Float**: Set the days float.

**Alter Float**: Withdraw/Deposit money from/to the cash draw

**Change PIN**: Give the ability to change their pin number.

**Allow Quit**: Quit out of Menumate and out to Windows.

**Pay Invoice**: Pay off an invoice at the POS that is in the Debtors system.

**Transfer to Invoice**: Transfer from a tab or table to the invoice system.

**Maintenance**: Access to the maintenance screen from the Menumate main start up screen.

**Import Menus**: Manually import a menu from a file. This is normally automatic when using menumate office.

**Add/Edit users**: What we are doing now. If someone can do this they may as well have access to everything else as they can get in here and give themselves access anyway.

**Configure Printers**: Setup and configure kitchen and receipt printers

**Payment Types**: Allow you to setup new payment types, Cash, Visa etc...

**Secure Payment 1, 2, 3**: Payment types can be setup with security on them so that only certain people can use them. When you setup the payment type up you can pick if it's 1, 2, or 3. Ticking the same number here lets you use it. Normal payment types like Cash or EFTPos don't have this selected.

**Surcharge/Discount Bill**: Lets you manually apply a discount or surcharge.

**Misc Discounts**: With this selected you can change the price for the current sale only. It will revert back to the normal price afterwards.

## Time Clock

***Clock In/Out***

The clock in/out feature is already for you to go, no set up required. For a staff member to clock in they must first be on the main start screen.

1) Press **Time Clock**.
2) Click on **Clock In**, and enter your pin.
3) Pick the department you are working in by clicking on one of the blue buttons. See Figure 3. You are now clocked in.

To clock out.

1) Press Time Clock.
2) Click on Clock In, and enter your pin.
3) The **Clock Out** button will no longer be greyed out so you can press it to clock out.

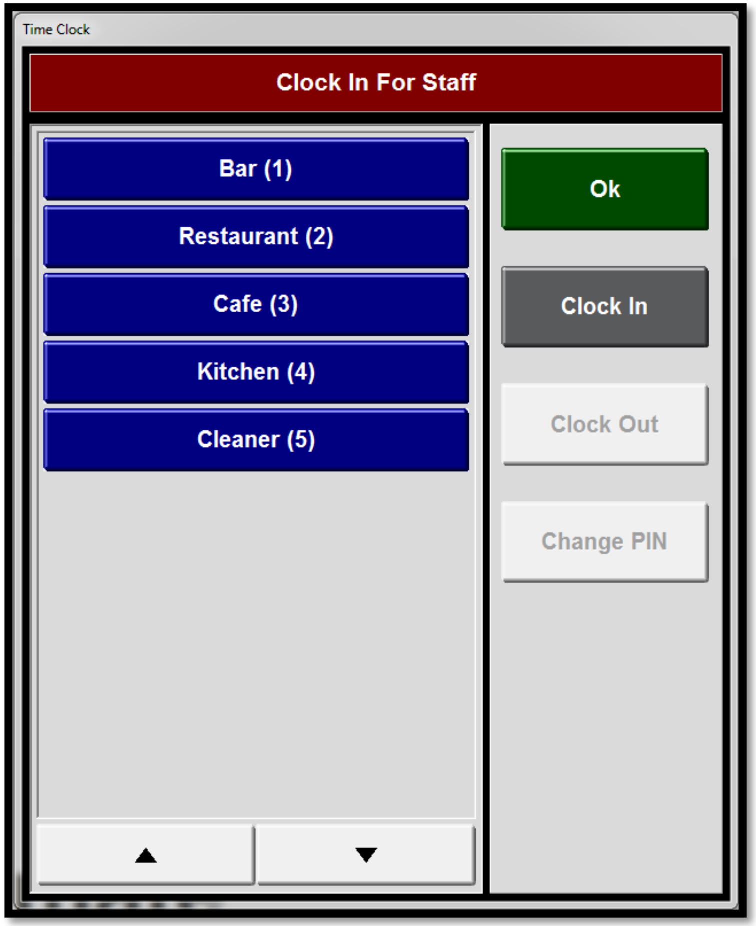


**Figure 3**

> A report can be generated from the back office system showing the hours worked by each staff member.
> You can also get it set up export to pay roll software. For more details on this contact Menumate via the helpdesk line or email at support@menumate.com

> The sections you can clock into can be changed to suit your company in the **maintenance** section of the POS.
> Go to **Misc Settings** and then Staff Options. From here you can edit, add and delete departments.

## Setting up Discounts & Surcharges

***The Basics***

To start make sure you are on the main start screen of Menumate. Any time you see the Login screen, enter your code.

1) Press **Maintenance**.
2) Click on **Discount & Surcharge**.
3) This screen shows the current discounts and surcharges that have been created so far. To create a new one press **Add**. See Figure 4.
4) Click on **Button Name**. Enter the name and press Ok. See Figure 5.
5) Then press **Amount**.
6) A new window will come up See Figure 6. Press the Mode button until it is the one you want.

> The different Modes are
> a) $ Mode (Set dollar amount will come off the bill)
> b) %Mode (Set percent off the bill)
> c) Set Price (Set the price of each item on the bill)

7) Type in the amount you want.
8) Press **Applying Discount** or **Applying Surcharge** to toggle between the two. Have the one you want showing.
9) Press **OK**.
10) Under all the buttons in Figure 5 is Discount Type. Pick the one you want.
11) Next click in the white area under the heading **Discount Description** and type in a more detailed description of the button name. This will appear on the customer receipt and the back office reports.
12) Now Press **Ok** and the discount or surcharge has been made.

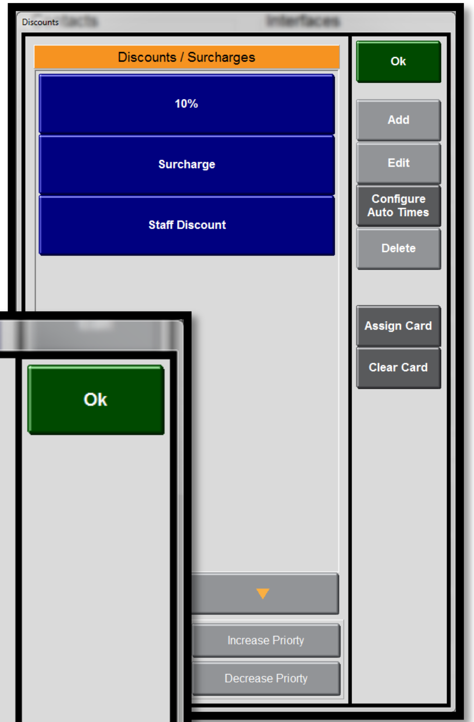


Figure 4

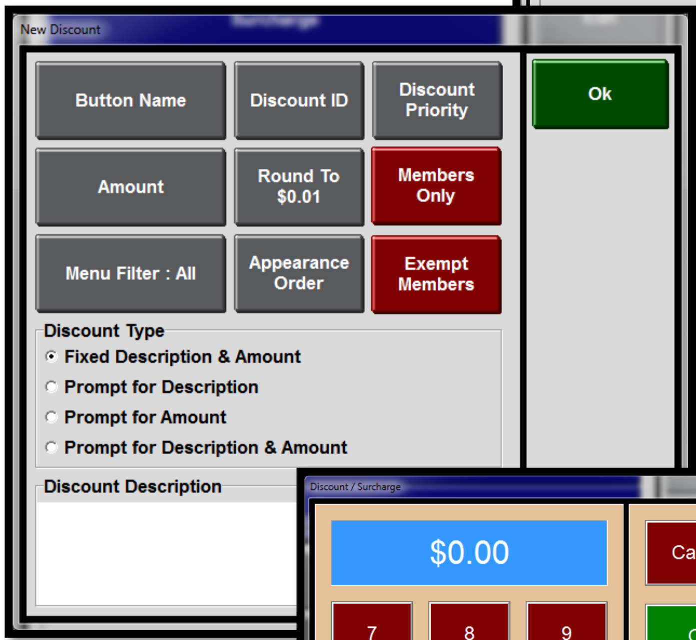


Figure 5

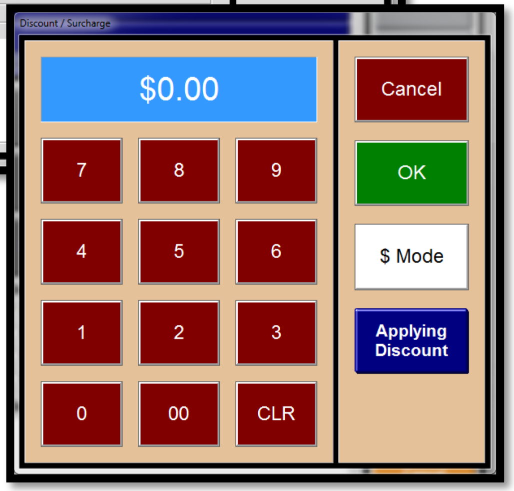


Figure 6

# Setting up Discounts & Surcharges

***More options***

The previous page showed us how to make a basic discount or surcharge but there are many different options you can add.

Let's start with Figure 7. Under the orange heading is the list of current discounts and surcharges setup so far. You can select one of these by clicking on it and then you can press

1) **Edit** to take you to Figure 8.
2) **Configure Auto Times** to make a discount or surcharge come on at a specified time. This will be explained in more detail later in this book.
3) **Delete** to remove the discount.
4) **Assign Card** lets you swipe a card, like a loyalty card, that you can use the card to apply the discount.
5) **Clear Card** will clear the card from the discount.
6) **Priority Order** is the order the discounts are applied.
7) **Appearance Order** is the order the discount display when you go to pick the discount you want to apply.
8) In Figure 8, **Discount ID** is for smart card sites that want to use discounts at different stores.
9) **Discount Priority** is the order the discounts are applied.
10) **Round To $?** Is want you want the dollar figure to round to after discount has been applied.
11) **Members Only**, is just that. Only members get this discount.
12) **Exempt Members** is used when members don't get this surcharge or discount
13) **Menu Filter** can be used to have the discount apply to items from one menu.
14) **Appearance Order** is the order the discount display when you go to pick the discount you want to apply.

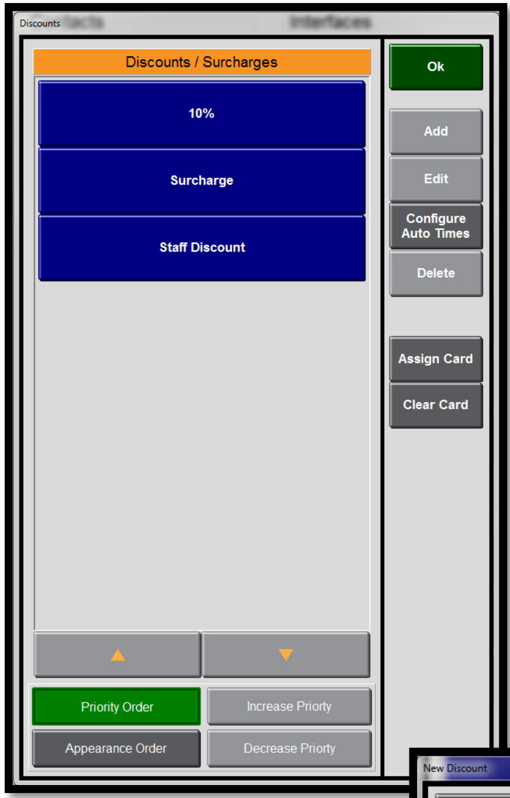


Figure 7

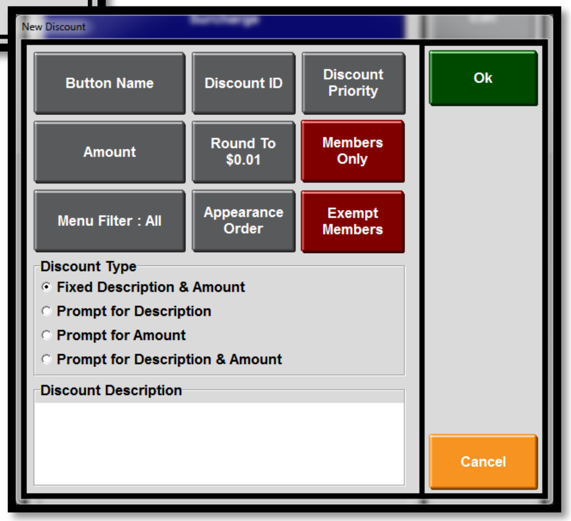


Figure 8

# Setting up Discounts & Surcharges

***Auto Times***

Menumate has the functionality to pre-program discounts and surcharges for future dates. This is specifically designed for Public Holiday's but can also be used for discounts or special events.

When the system is configured, the discount/surcharge will automatically be added to each item as it is sold.

Once the discount or surcharge has been setup select the **Configure Auto Times** button. See Figure 9

If you want to run the surcharge on 11 October 2011 for the full day then select the YEAR 2011, the Month of October and the day of the 11th and Set the start time at 00:01 and click on **Set Start Time**. Then select the day of the 12th and set the end time to 00:01 and click on **Set End Time**. Once these settings have been configure click on **Add Discount**. See Figure 10

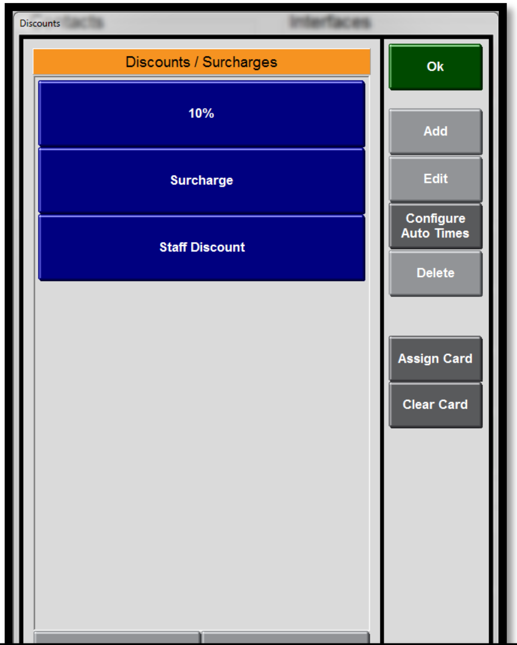


Figure 9


Figure 10

## Happy Hour

***Setting it up***

To set the happy hour you will first need to get the menus setup to support happy hour, details on this can be found in the menu editor manual.

To set the POS up go to the main start screen of Menumate.

1) Press **Maintenance**.
2) Click on **Happy Hour**.
3) Put a tick in the boxes next to the days you wish to have happy hour See Figure 11.
4) Set the start time by clicking on the hour section and using the up and down arrows to change the number. Do the same for the minutes.
5) Set the finish time by clicking on the hour section and using the up and down arrows to change the number. Do the same for the minutes.
6) Once set press **Ok** and you are done, the POS will automatically switch in to happy hour mode during these times.

When happy hour pricing is on the POS will display a Happy Hour heading just under the time. See Figure 12.

There are a couple of other options that you can pick.

a) **Force Terminal now**. This will put this POS in to happy hour mode now. This can also be done from the **Function** button inside the POS. See Figure 12.
b) **Terminal is exempt from happy hour**. If this is selected then this POS will not go in to happy hour.
c) **Happy Hour is for Members Only**. Members will only get the happy hour prices.

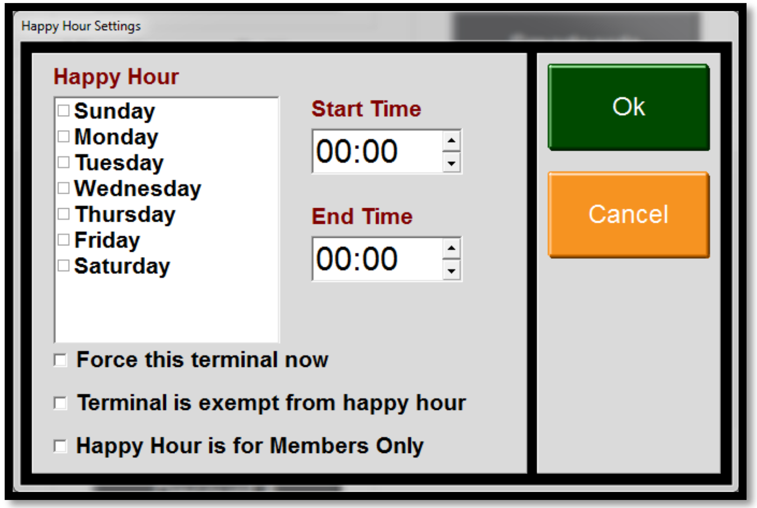


Figure 11

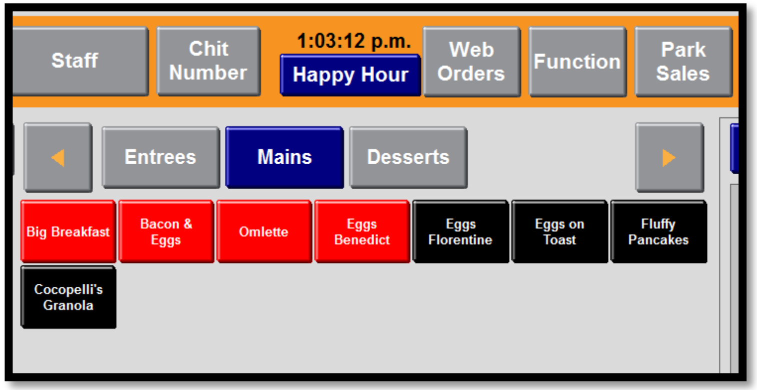


Figure 12

## Membership

***Entering members into the Menumate POS***

1) To Set up a member select Membership in the top right of the pos screen.
2) Press **Add**. See Figure 13.
3) Press **Edit**. See Figure 14.
4) Go through the list clicking on the buttons you wish to put information. Press **Done** when you are finished.

While all the fields are important and the more information you gather the better your membership database will end up, the following fields are critical and probably should be considered mandatory.

   a. Customer Name
   b. Mobile Phone Number
   c. Email Address
   d. Date of Birth

1) Enter the members **Day**, **Month** and **Year** (if provided) for their birthday and then click on **Set Birthday**.
2) Click on **Swipe Card(s)** to bring up the swipe card dialog box.
3) Swipe the card. Once you do the dialog box will disappear and the card will be allocated to the member.
4) The member is now setup. Click **Ok** to save.

Sometimes the DISPLAY NOTES field, which appears on the POS below the members name, is used to hold the members favourite Drink (Long Black) or maybe their favourite Sport (Golf) etc. It provides something to allow the POS operator to interact with the member when ordering.


Figure 13

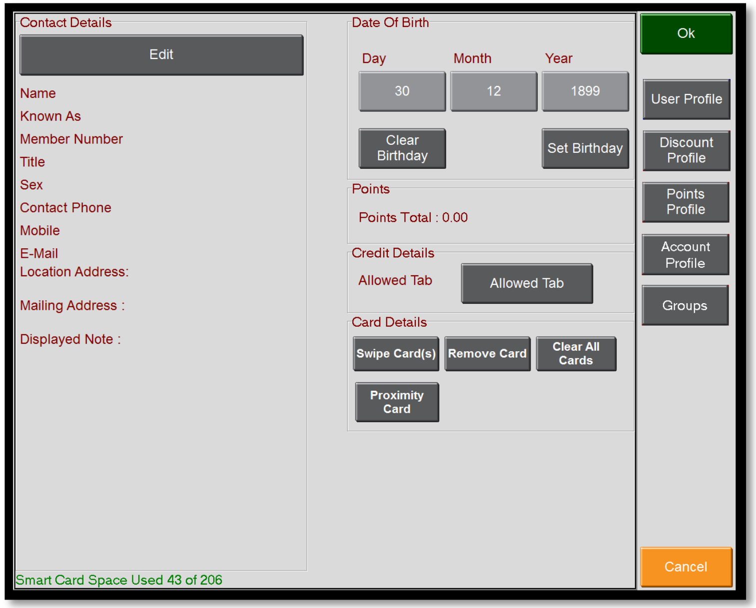


Figure 14

## Credits

***Refunding a customer***

If a customer is overcharged or you need to credit them back for some other reason the follow these steps. This is done after they have paid, if they haven't paid yet then look at the cancels section.

1) Order the item that you need to credit the customer.
2) Press **Tender**.
3) Then click on **Credit**. See Figure 15.
4) Next put in a reason for the credit and press **Ok**.
5) You will then be asked if you want to return this item to stock. If you can use the product then press **Yes**, if you can't press **No**.
6) Then choose the payment type to pay the customer back with e.g. Cash.
7) Then close the bill and give the customer their change.

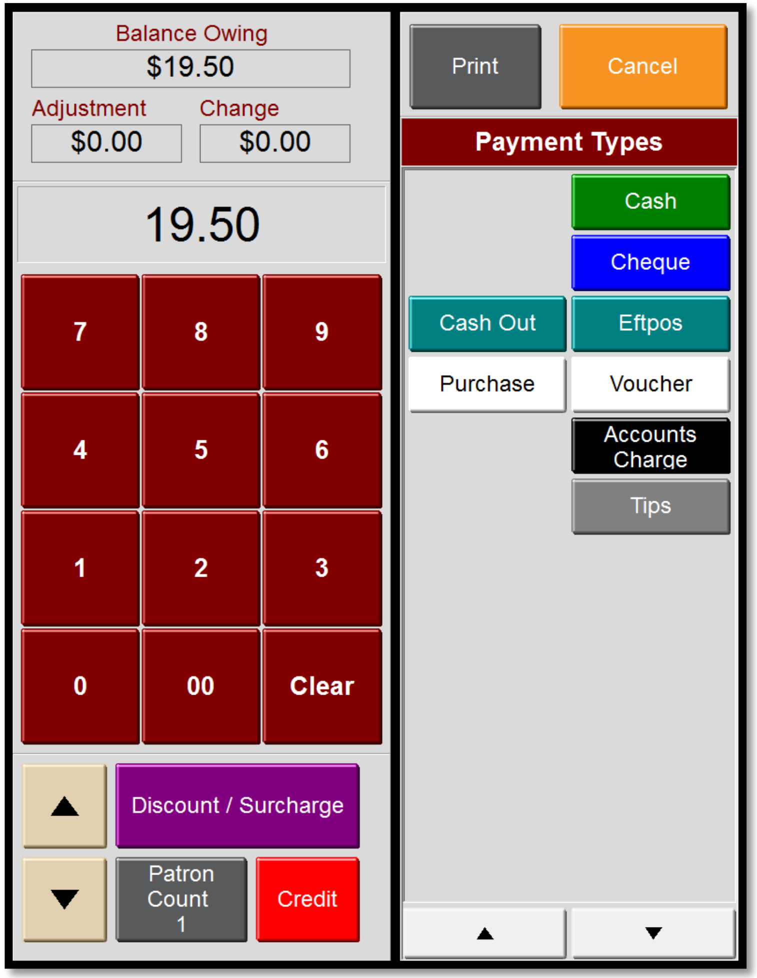


Figure 15

You can force the staff to put reasons in as well that way you will always have reasons coming through on your reports so you can track your credit movement easier.

Pre loading the system with reasons will help speed this up. The next page can show you how to do this.

## Credits

***Pre loading the reasons***

You can pre load the system with common credit reasons. This will speed up the process at the pos and also get consistent reporting. Start on the main start screen of Menumate.

1) Press **Maintenance**.
2) Click on **Credit**.
3) This screen shows the current credit reasons that have been created so far. To create a new one press **Add**. See Figure 16.
4) Enter the name you want on the button and press Ok.
5) Then enter the message you want on your zed and office reports.

You can also **Edit** and **Delete** the current selected reason by clicking on the reason first and then the appropriate button. This is all done from the screen shown in Figure 16.

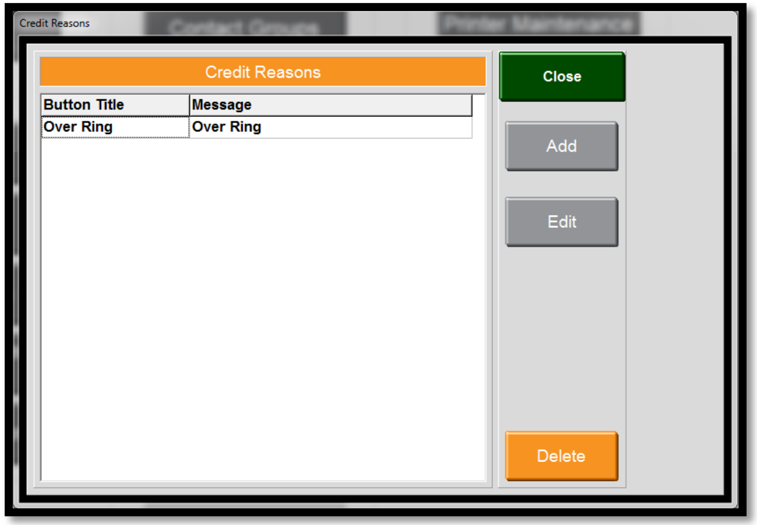


**Figure 16**

## Cancels

***Pre loading the reasons***

You can pre load the system with common cancel reasons. This will speed up the process at the pos and also get consistent reporting. Start on the main start screen of Menumate.

1) Press **Maintenance**.
2) Click on **Cancel**.
3) This screen shows the current cancel reasons that have been created so far. To create a new one press **Add**. See Figure 17.
4) Enter the name you want on the button and press Ok.
5) Then enter the message you want on your zed and office reports.

You can also **Edit** and **Delete** the current selected reason by clicking on the reason first and then the appropriate button. This is all done from the screen shown in Figure 17.

You can force the staff to put reasons in as well, that way you will always have reasons coming through on your reports so you can track your cancels easier.

Pre loading the system with reasons will help speed this up.

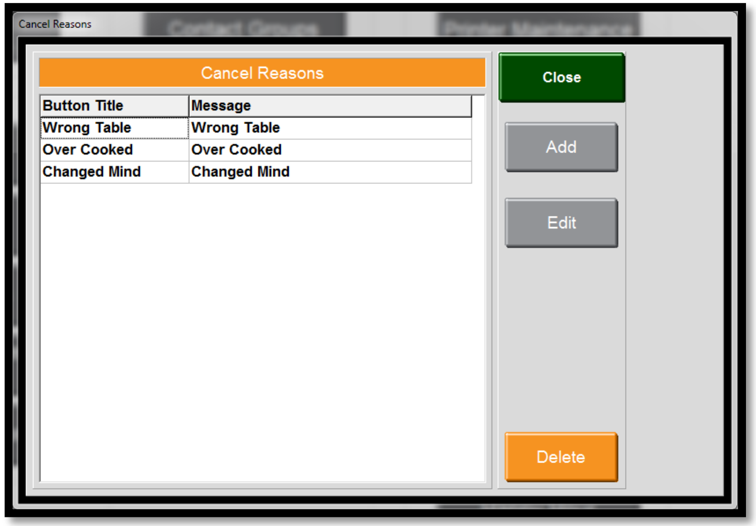


**Figure 17**

## Chit Numbers

***Cafe Style Ordering***

To Set up Chit numbers go to the main start screen of menumate.

1) Press **Maintenance**.
2) Click on **Chit Numbers**.
3) In this screen you can **Add**, **Edit** and **Delete** chit numbers, and also select what POS use the Chit number By Selecting **Terminals**. Since we are setting up a chit number press **Add**. See Figure 18
4) Click on **Name : Chit Number** and give it a name e.g. Meal, Order, or Table etc... See Figure 19
5) Next is **Mask**. This is what you want to print. Type in your label and put in a '**%**' symbol where you want the number to show e.g. Table %.
6) **Prompt type** is next. This will give you 3 options.
    a. **Off (Disable)** – With this one the system won't ask for you to pick a chit number. You will have to do it yourself when you need it.
    b. **Auto (Next Number)** – This one will just go to the next number and will not ask you for anything.
    c. **Prompt (Ask for Number)** – Here it will ask you to put in a number for every sale.
7) Next you choose if you would like the number to be in numeric format or alpha numeric by clicking on **Format**.
8) Now press **Ok** to go back to the screen in Figure 18. You should see your chit number name in the list. We now need to select what POS are going to use this Chit number so press **Terminals**.
9) This screen shows the POS names on the left, Press one of them and the chit number will be on the right. If you select the chit number it will be available on that POS. Do this for all the POS you want using the chit number. If you have multiple numbers you can press default to force the POS to use this chit number first.


**Figure 18**

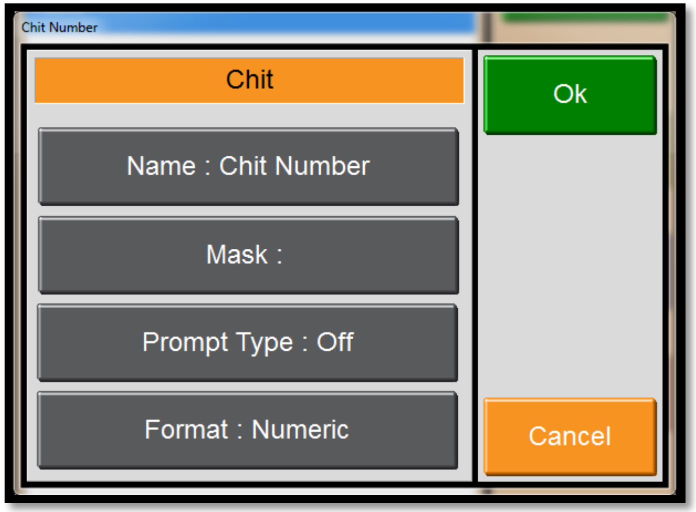


**Figure 19**

## Write Off

***Or wastage***

This section is used if you need to write off some stock or a product.

1) Order the item you wish to write off.
2) Click on **Function** at the top of the screen.
3) Then **Write Off**. See Figure 20.
4) You will then be asked, “Do you wish to write off these items as wastage?’. Select **Yes**.
5) Press Notes: and enter a reason why it’s a write off.

> You can force the staff to put reasons in as well that way you will always have reasons coming through on your reports so you can track your cancels easier.
>
> Pre loading the system with reasons will help speed this up.

You can pre load the system with common write off reasons. This will get consistent reporting. Start on the main start screen of Menumate.

1) Press **Maintenance**.
2) Click on **Writeoff Reasons**.
3) This screen shows the current write off reasons that have been created so far. To create a new one press **Add**. See Figure 21.
4) Enter the name you want on the button and press Ok.
5) Then enter the message you want on your zed and office reports.

> You can also **Edit** and **Delete** the current selected reason by clicking on the reason first and then the appropriate button. This is all done from the screen shown in Figure 21.


Figure 20

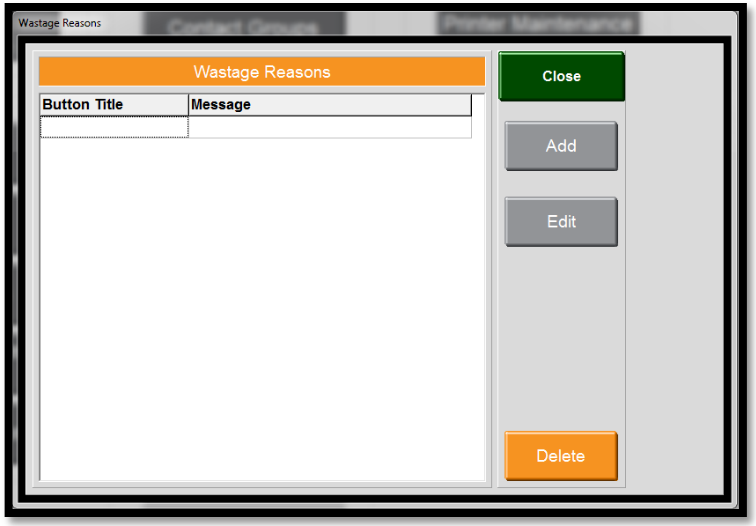


Figure 21

# Floats

***Setting float, Withdraw/Deposit***

To set the floats at the start of the day go into the normal.

1) Press **Function** at the top of the screen.
2) Click on **Float Management**. See Figure 22
3) Then **Set Float**.
4) Enter the float amount and press **Ok**. The float is now set for the day.

> The float doesn't save from day to day so you will have to set it each day. This can be at any point of the day but you can't do a deposit or withdraw until it is set.

**Figure 22**

This next section shows you how to do a Float adjustment in the form of a withdraw or deposit.

1) Press **Function** at the top of the screen.
2) Click on **Float Management**. See Figure 22
3) Then **Adjust Float**.
4) Enter the amount and press either **Deposit** or **Withdraw** depending on what you wish to do. See Figure 23
5) Next put in a reason for the deposit or withdraw and press **Ok**.

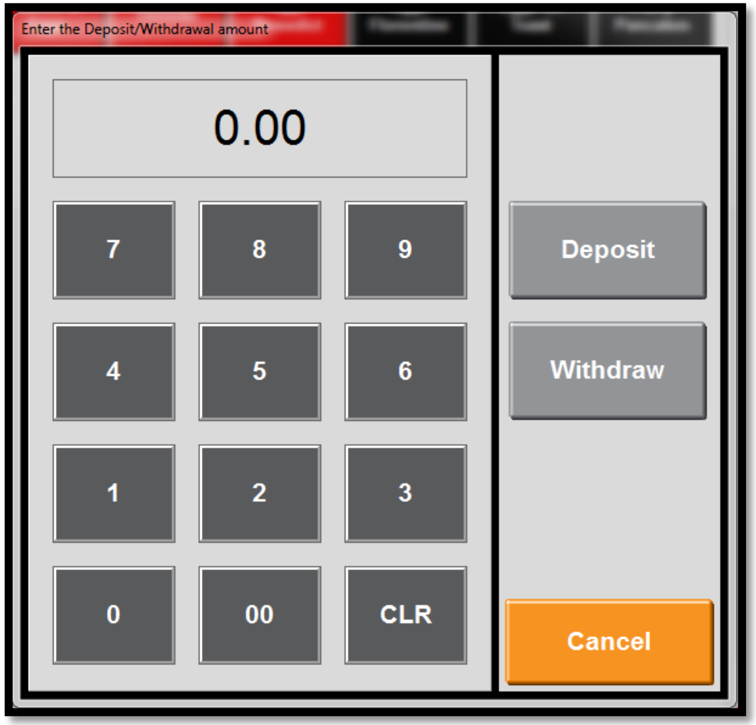

**Figure 23**

> You can force the staff to put reasons in as well that way you will always have reasons coming through on your reports so you can track your float movement easier.
>
> Pre loading the system with reasons will help speed this up. The next page can show you how to do this.

# Float Adjustments

***Pre loading the reasons***

You can pre load the system with common float adjustment reasons. This will speed up the process at the pos and also get consistent reporting. Start on the main start screen of Menumate.

1) Press **Maintenance**.
2) Click on **Float Adjustment Reasons**.
3) This screen shows the current cancel reasons that have been created so far. To create a new one press **Add**. See Figure 24.
4) Enter the name you want on the button and press **Ok**.
5) Then enter the message you want on your zed and office reports and press **Ok**.

You can also **Edit** and **Delete** the current selected reason by clicking on the reason first and then the appropriate button. This is all done from the screen shown in Figure 24.

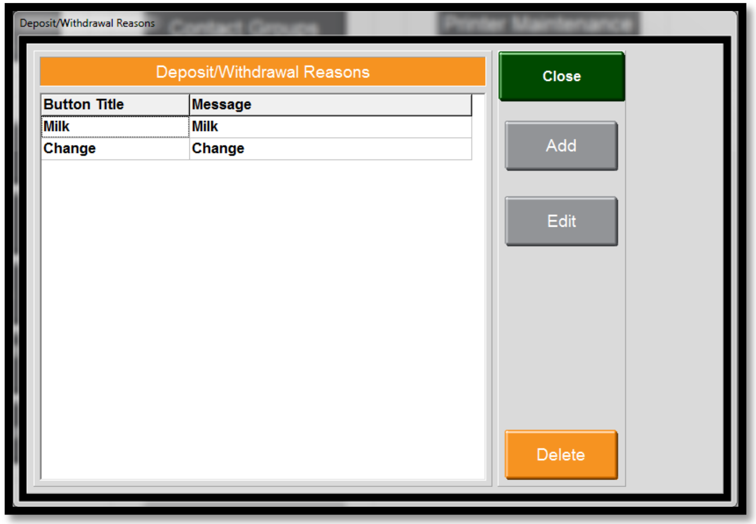


Figure 24

# Reading the Zed

Ok so you have the Zed report in your hands but what does it all mean?
Lets step through each of the sections

### Transactions Summary Group

See Figure 25
This is the part that you use to balance up the cash draw to. It shows your total expected cash in draw, your eftpos total and the number in brackets is the number of eftpos transactions along with any cash out. Any other payment types will also show here giving you a total to balance to.
The *Other Totals* section you can see is a credit added to a Tab but may also contain voucher information.

> In this section you may also see different group numbers. The example we have just has one group, Group 0, as displayed in the heading. This is just a selected of similar payment types but you may have another heading with Group 1 or 2 in it. These get created when the payment type is made and are normally non bankable things like Free Coffee cards, and it keeps the totals separate from each other.

| Transactions Summary Group 0 | |
|---|---|
| Initial Float | $52.18 |
| Float Adjustments | $0.00 |
| Cash | $1091.50 |
| Cash In Drawer Total | $1143.68 |
| Eftpos (3) | $48.50 |
| Eftpos Cash Out (1) | $20.00 |
| Subtotal | $1212.18 |
| Less Float & Skims | -$52.18 |
| Total | $1160.00 |
| Rounding (+ = Loss) | $0.00 |
| **Other Totals** | |
| Tabs Credit Sold | $200.00 |
| Credit Movement (+ = Gain) | $200.00 |

Figure 25

### Billed Sales Totals

See Figure 26
This is a breakdown of the different products you have received payment for today. These categories are created in the menu editor in the Menumate back office programme.

> This section may include things that were ordered a few days before on a tab that have now been paid for so we recommend not trying to balance it up to back office reports like the Consumption report as the product may not have been consumed today.

| Billed Sales Totals | | |
|---|---|---|
| Beverage | 31.72 | $48.50 |
| Beer | 19.00 | $35.00 |
| Drink options | 1.00 | $6.00 |
| Spirits | 1.00 | $7.50 |
| White Wine | 10.72 | $0.00 |
| Food | 2.61 | $46.00 |
| All day | 0.12 | $0.55 |
| Lunch | 2.00 | $41.00 |
| Snacks | 0.49 | $4.45 |
| Food. | 45.00 | $865.50 |
| Breakfast. | 27.00 | $528.00 |
| Entrees | 6.00 | $87.50 |
| Mains | 3.00 | $89.00 |
| Pasta | 2.00 | $44.00 |
| Pizza | 1.00 | $0.00 |
| Pizza Options | 2.00 | $33.50 |
| Salads | 4.00 | $83.50 |
| SubTotal | | $960.00 |
| Tax Contents Inc | | $124.34 |

Figure 26

# Reading the Zed

## Charged Sales Totals

See Figure 27
This section shows what has been saved to Tabs, Tables, and Accounts etc... that you have yet to receive payment for. These will appear in the Billed Sales section on the day payment is received.

```
___________ Charged Sales Totals ___________
Beverage                5.00          $30.00
  Beer                  4.00           $5.00
  White Wine            1.00          $25.00

Food.                   7.00         $136.50
  Breakfast.            3.00          $61.00
  Entrees               1.00          $13.00
  Pasta                 2.00          $45.00
  Salads                1.00          $17.50
                               _____________
SubTotal                             $166.50
Tax Contents Inc                      $21.72
```

Figure 27

## Totals

This is showing the total of the two sections above, Billed Sales Totals and Charged sales totals.

## Credit, Discount and Cancel Report

See Figure 28
Here you will see a brief report on what credits, discounts and cancels done since the last zed. More information can be pulled from Menumate Office.

```
============================================
               Credit Report

26/01/12 15:48                       -$24.00
Over charged
                             ===============
Total Credits                        -$24.00

============================================


============================================
              Discount Report
Name                                   Total

13:27 Test 10% Fixed                  -$0.03

13:27 Test 10% Fixed                  -$0.03
                             ===============
Total Discounts                       -$0.06
============================================


============================================
        Cancel Report for Zed Period

15/12/11 15:53                       -$17.50

12/01/12 14:34                        -$5.00

12/01/12 14:56                       -$17.50

12/01/12 15:13                       -$22.00
                             ===============
Total Cancels                        -$62.00

============================================
```

Figure 28

# Reading the Zed

## Float Audit

See Figure 29
This shows what the float was set at plus any adjustment and who did them, at what time and the reason for it.

```
==============================================
                 Float Audit
==============================================

Operator    Time        Reason          Total
Staff       13:34:57    Set Float      $52.18
            Final Float:               $52.18


----------------------------------------------
```

Figure 29

## Averages

See Figure 30
Shows the average sale amount separated by Saved (saved to tables), Cash (paid straight away, not necessarily with cash), Tab (anything saved to a tab)

> If nothing is showing in here then Patron types will need to be set up. Go to Maintenance the Patron Types and add one.

```
----------------------------------------------
                  Averages
Sale Type      Patron Count     Average Spent
----------------------------------------------
Saved Sales         17                 $23.29
Cash Sales           5                $103.30
Tab Sales            2                 $23.75
==============================================

----------------------------------------------
```

Figure 30

## Account Purchases for Zed Period

See Figure 31
Anything saved and not billed since the last zed will show here telling you what Tab or Table it was saved to.

```
----------------------------------------------
      Account Purchases for Zed Period
Tabs
                           Jim          $0.00

Seated
               Table 1 Guest 1         $25.00
              Table 10 Guest 1         $13.00
               Table 5 Guest 1         $32.50
               Table 5 Guest 2         $30.00
              Table 99 Guest 1         $41.50
              Table 99 Guest 2         $24.50
                               ---------------
                  Total Seated        $166.50

                               ===============
 Total Saved Sales for Period         $166.50


----------------------------------------------
```

Figure 31

## Account Balances

This is the last section on the zed and shows all open tabs and tables. It doesn't matter when they were opened just that are open at the time of the zed.