



POS:101

**Essential Staff Guide to
Menumate Point of Sale**

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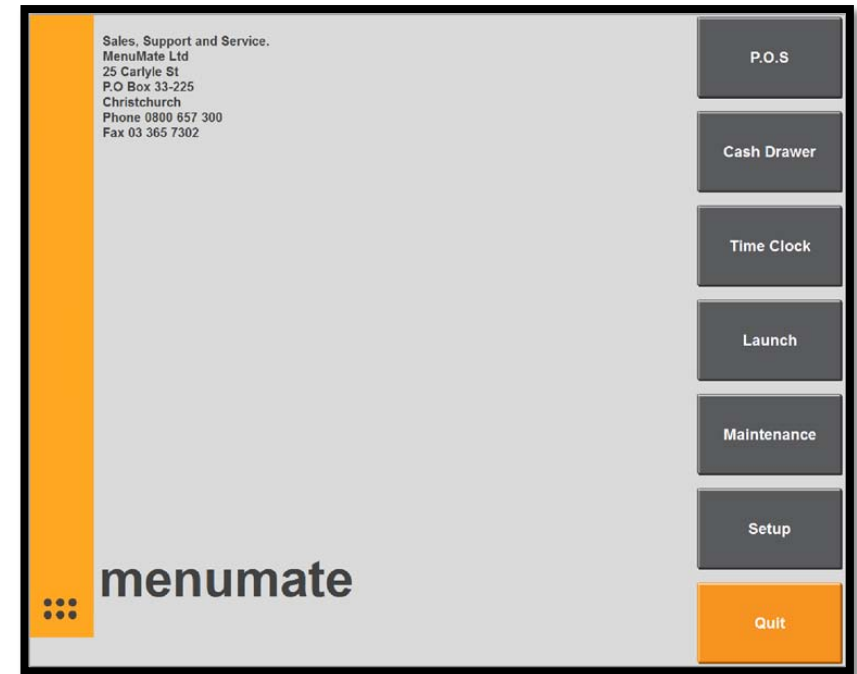
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Main Screen

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.

This entry screen for is the launching point for all Menumate operations. Front of house staff will spend most time in **POINT OF SALE**, selected by the top button.



| | |
|------------------|--|
| Operator Name | |
| Company | |
| Date | |
| Menumate Trainer | |

Changing your Operator PIN number

From time to time you may wish to change your personal operator security PIN number. This is your private number that ensures your operator name is not used by another staff member.

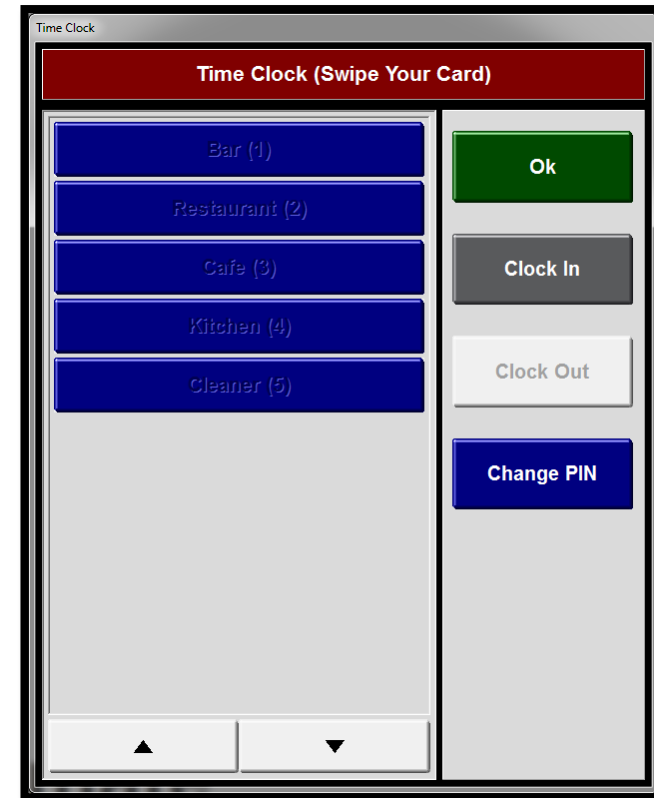
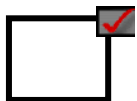
- 1) Press **Time Clock**
- 2) Press **Change PIN**
- 3) Select your operator name, enter your existing PIN number and press **OK**



If this is the first time changing your PIN number, the default PIN number is 11 and the new number has to be at least two digits long.

- 4) Enter your new then press **OK**
- 5) Enter your new PIN again and then press **OK**

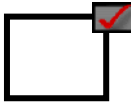
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Entering the Main 'Point of Sale' Screen

- 1) Press **POS**
- 2) Select your operator name, enter your PIN number and press **OK**

Completed

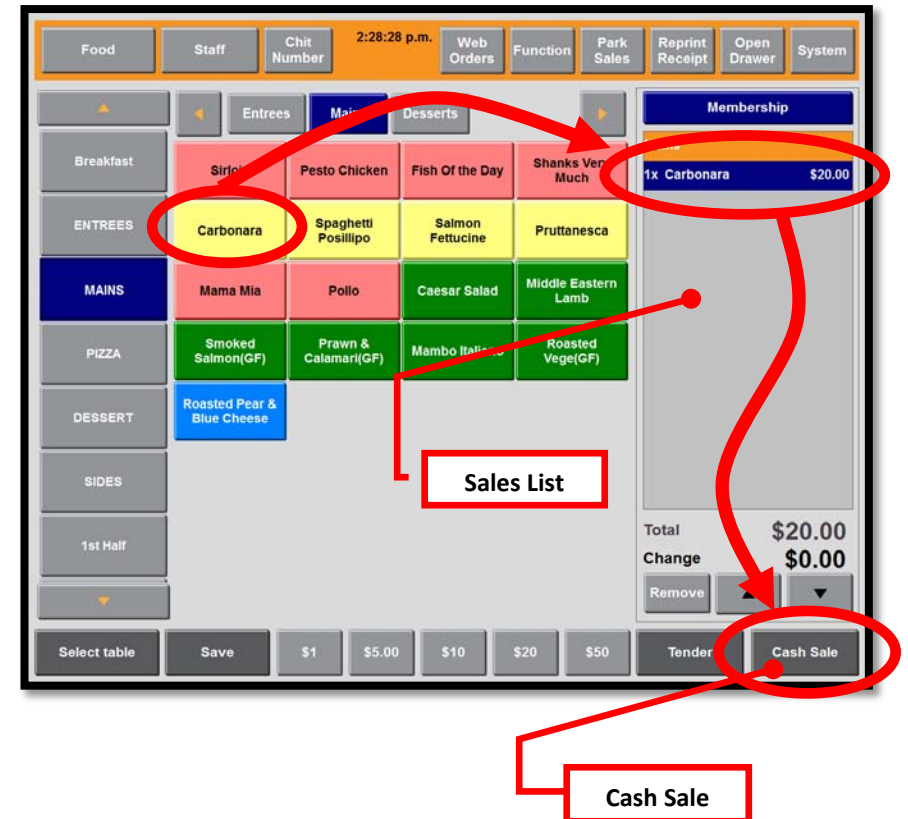


Cash Sale

A customer purchases an item from your menu and is paying cash.

- 1) Press one of the items on the menu to add to the *sales list* on the right side of screen
- 2) Press **Cash Sale**
- 3) The cash draw will open

Completed



Removing Items

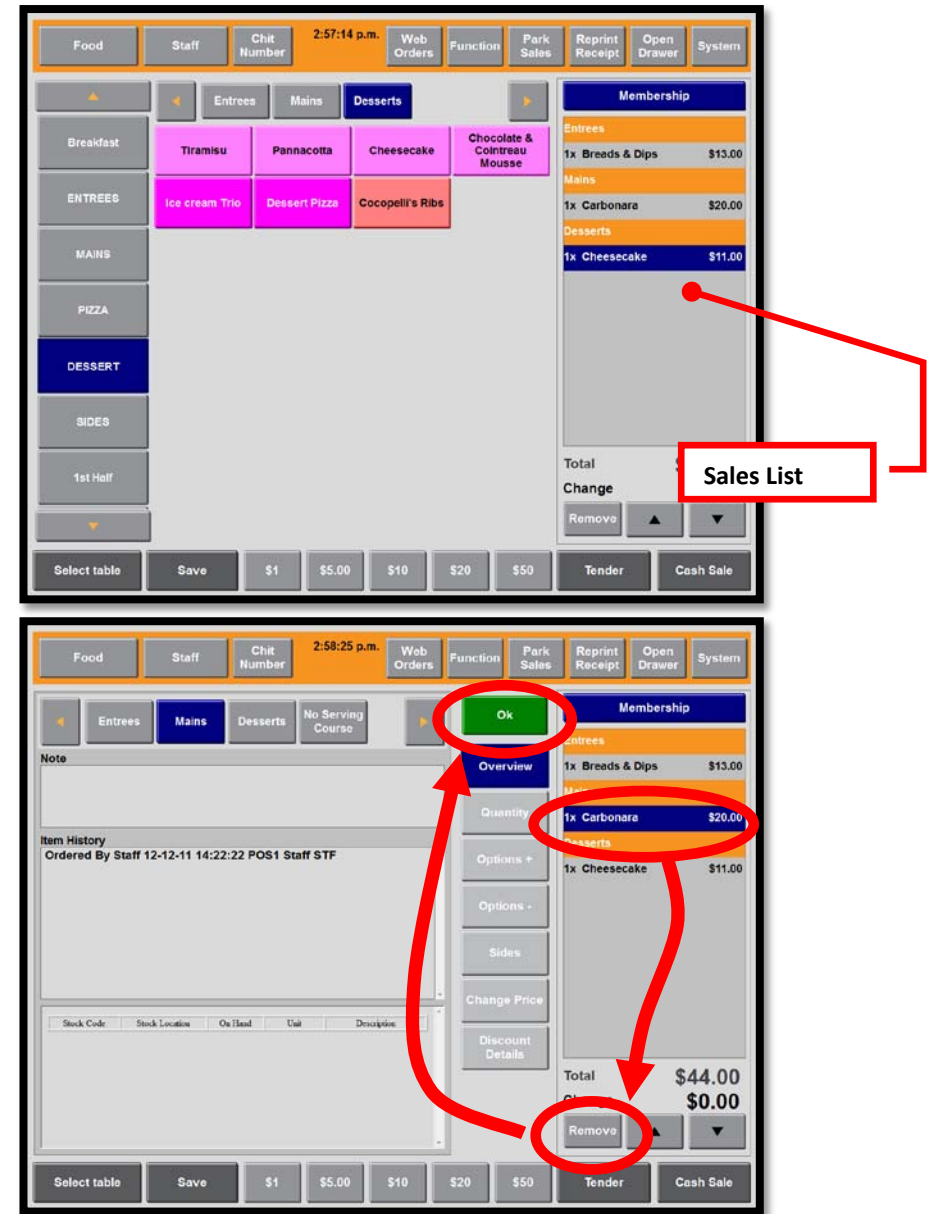
A customer purchases an item from your menu but you press the wrong thing.

- 1) Press several items to add them to the *sales list* on the right.
- 2) Press one of the items in the *sales list*. The screen changes to show details about the item.
- 3) Press **Remove** and then **Ok**.

You should see that the item has been removed from the *sales list*.

- 4) Cash off the rest of the items as normal.

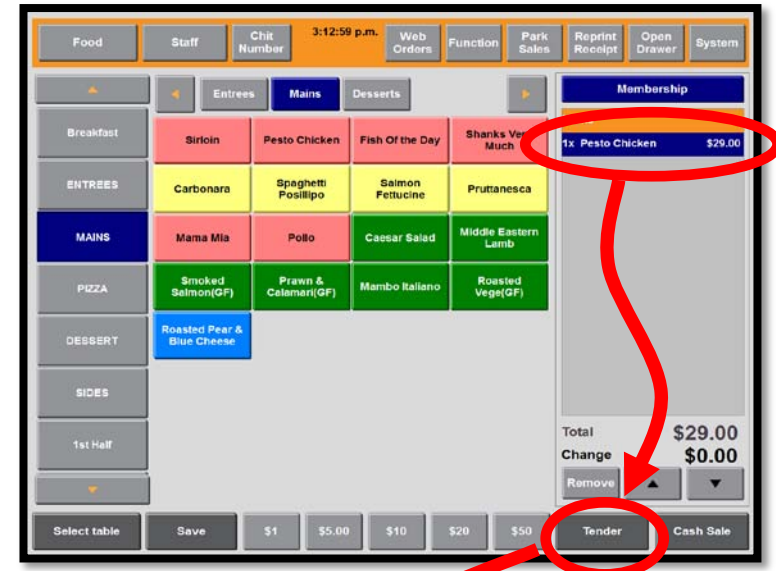
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Cash Sale and Calculating the Change

A customer purchases an item from your menu and is paying cash and you are using the system to show the change.

- 1) Press one of the items on the menu
- 2) Press **Tender**
- 3) Enter in the Amount the customer is paying e.g., 30.00
- 4) Press **Cash**
- 5) Press **Close and Print Bill**
- 6) The cash draw will open and the receipt will print.



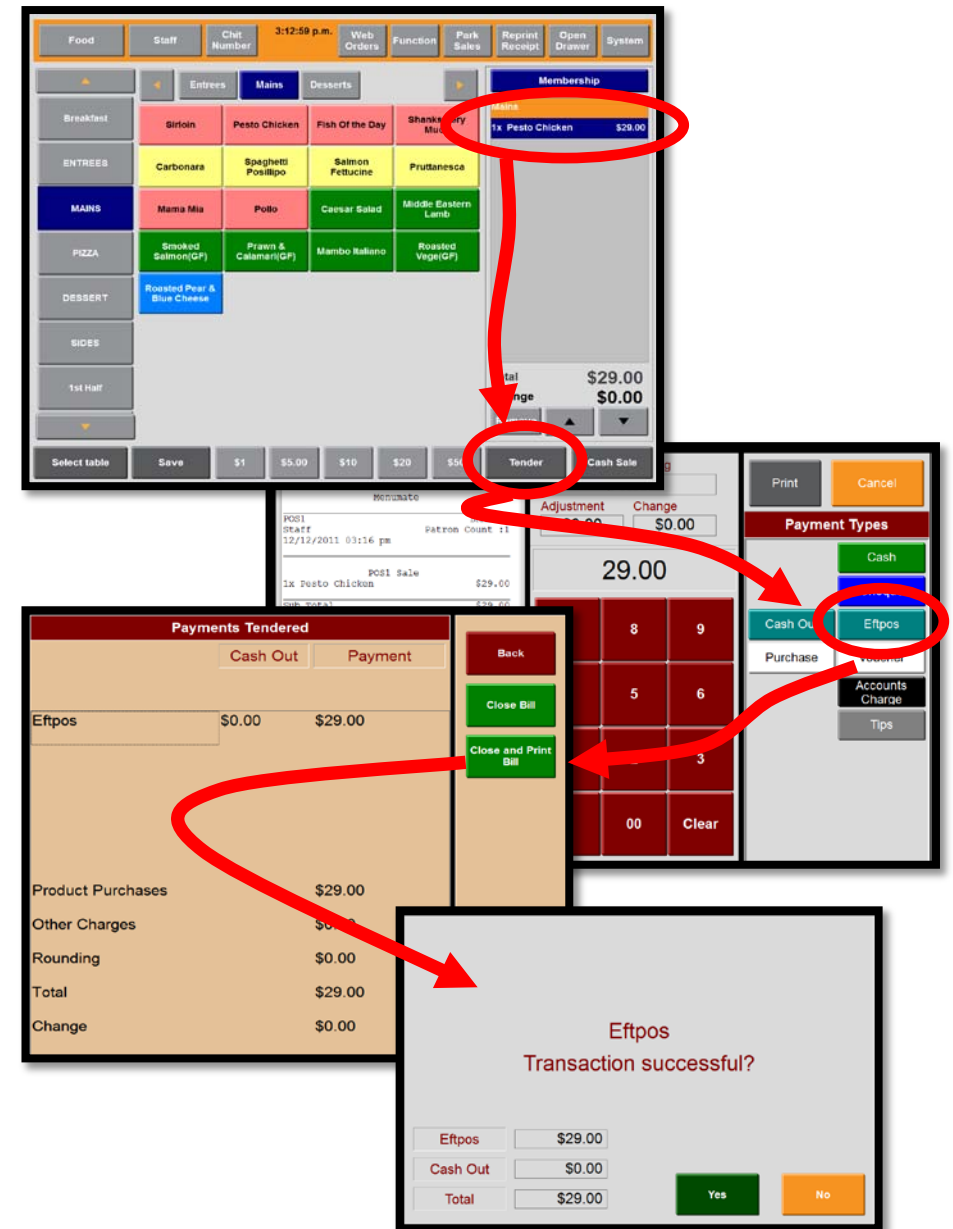
Completed



Sale and Paying by EFTPOS

A customer purchases an item from your menu and is paying with EFTPOS

- 1) Press one of the items on the menu
- 2) Press **Tender**
- 3) Press **EFTPOS**
- 4) Press **Close and Print Bill**
- 5) Screen will ask “EFTPOS transaction Successful?” check EFTPOS terminal says ‘Accepted’
- 6) Press **Yes** if accepted, for this exercise we will assume it was
- 7) The cash draw will open and the receipt will print.



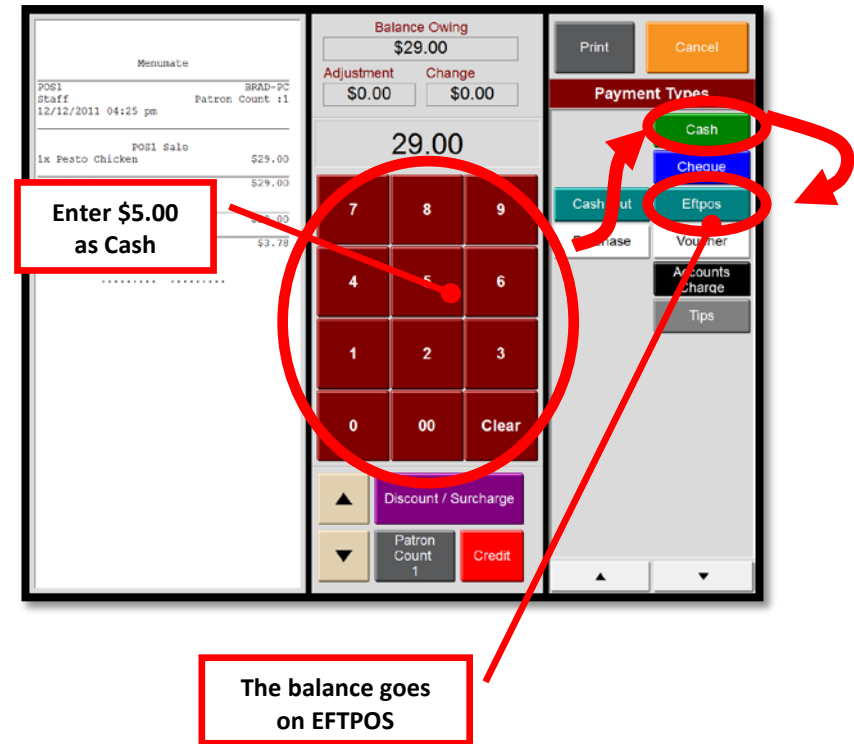
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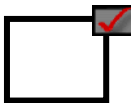
Sale and Paying by Cash and EFTPOS

A customer purchases an item from your menu and is paying \$5.00 with CASH and the balance with EFTPOS

- 1) Press one or two of the items on the menu
- 2) Press **Tender**
- 3) Enter 5.00 and press **CASH**
- 4) Press **EFTPOS**
- 5) Press **Close and Print Bill**
- 6) Check EFTPOS terminal says "Accepted"
- 7) Press **Yes**
- 8) The cash draw will open and the receipt will print.



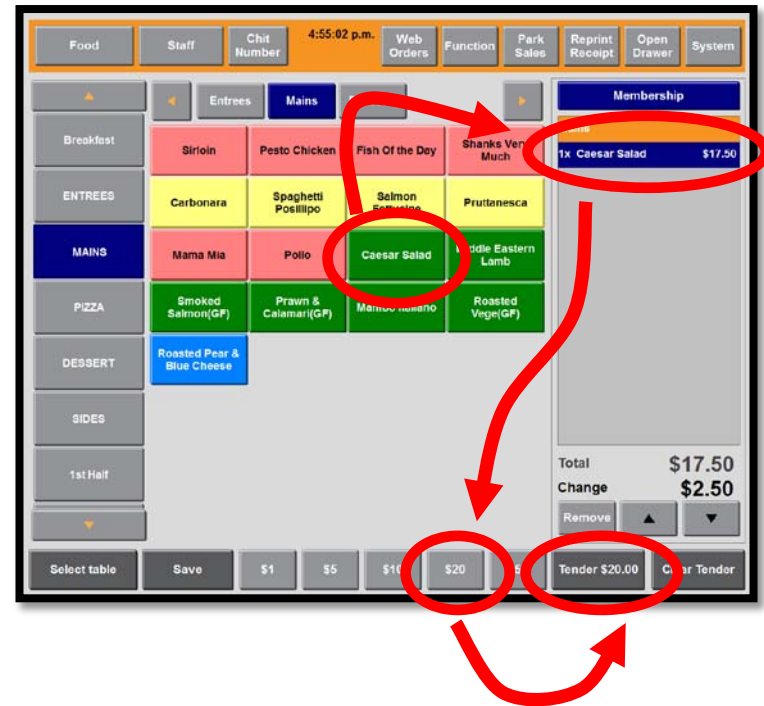
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Cash Sale using Fast Tender Keys

A customer purchases an item from your menu and is paying with a \$20.00 note. You will be using the fast tender buttons to finalise the sale.

- 1) Press one or two of the items on the menu
- 2) Press **\$20**
- 3) Press **TENDER \$20.00**
- 4) The cash draw will open.



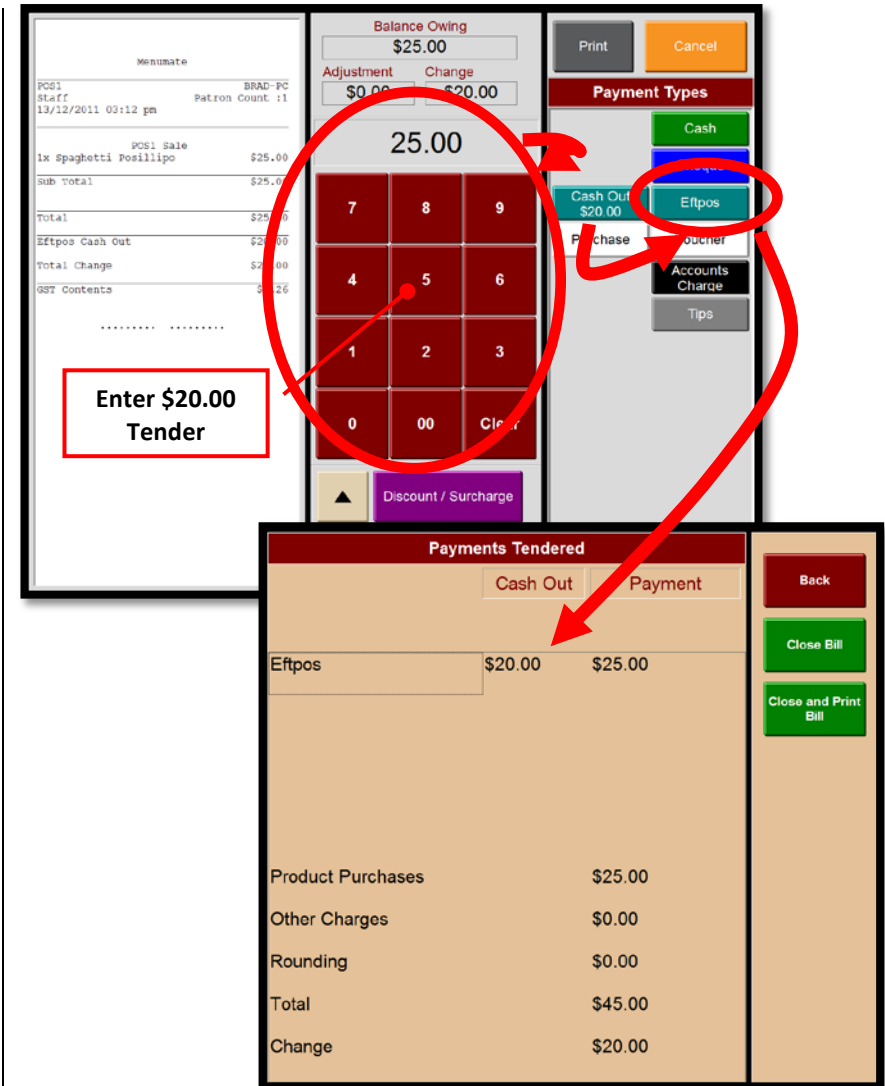
Completed



Sale and Paying by EFTPOS and With Cash Out

A customer purchases an item from your menu and is paying EFTPOS and wants \$20 cash out.

- 1) Press one or two of the items on the menu
- 2) Press **Tender**
- 3) Enter 20.00 and press **CASHOUT**. The button shows the amount entered
- 4) Press **EFTPOS**. The bill is made up the EFTPOS sale + \$20.00 cash out
- 5) Press **Close and Print Bill**
- 6) Check "Accepted" on ETPOS terminal
- 7) Press **Yes**
- 8) The cash draw will open and the receipt will print. Give cash change.



Completed

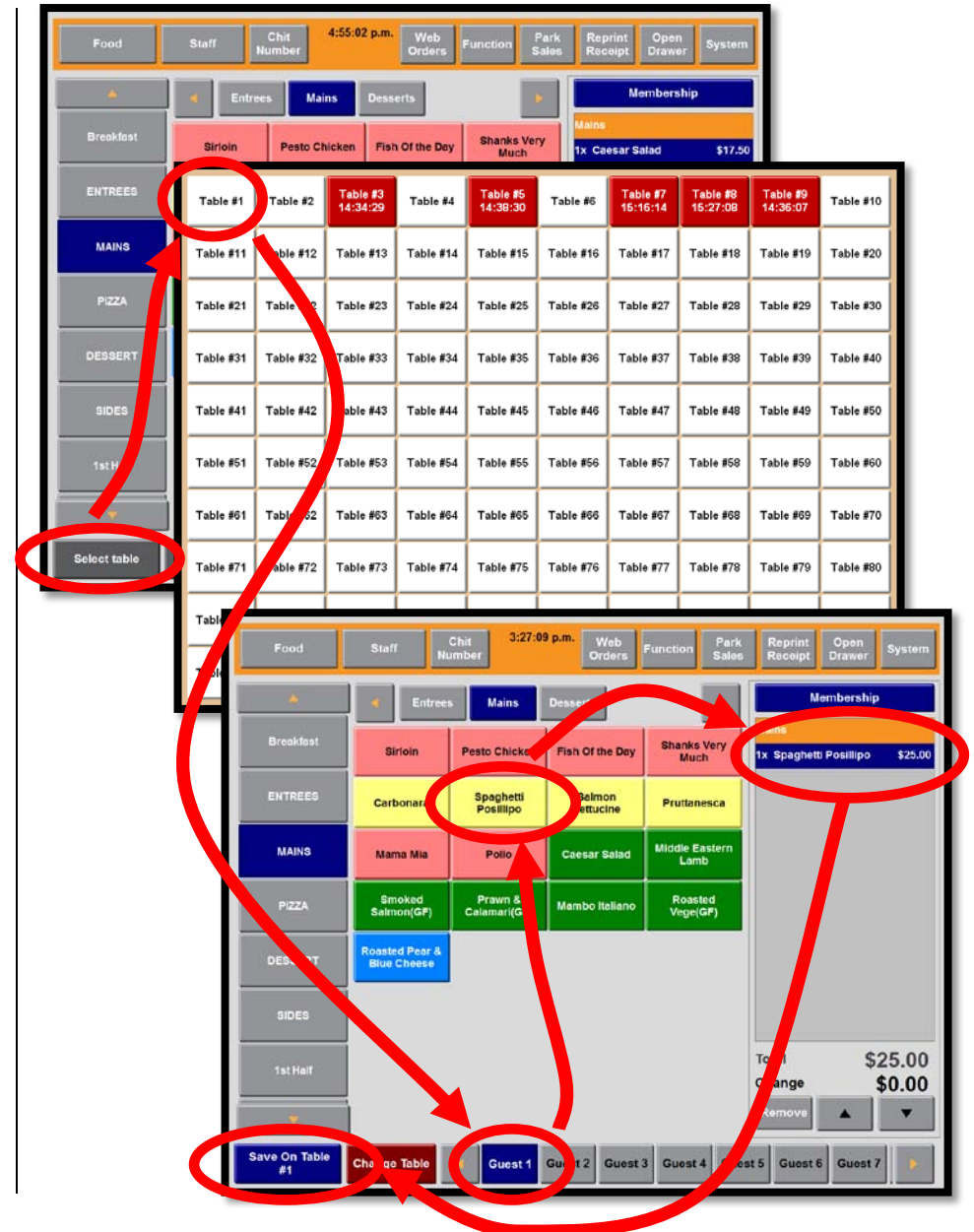
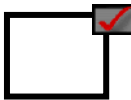


Ordering for one guest on a TABLE

A customer seated at a table orders from your menu and is paying later.

- 1) Press **Select Table** and then **Table #1**
- 2) Select **Guest 1**
- 3) Order one or two of the items on the menu
- 4) Press **Save on Table #1**
- 5) Press **Save**

Completed

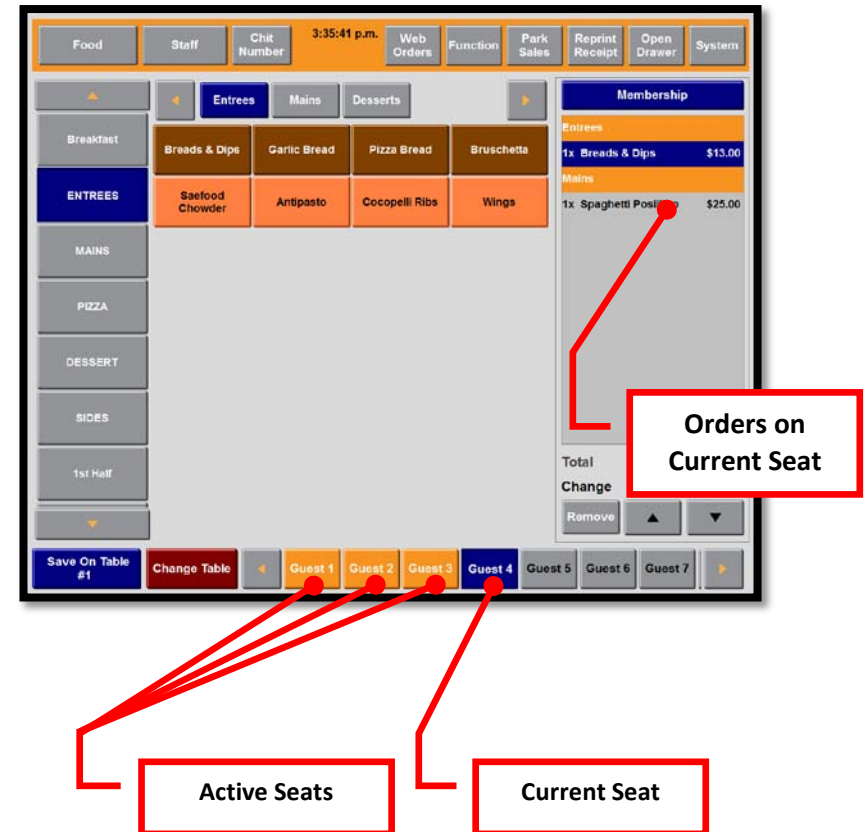


Ordering for four guests on a TABLE

Four customers seated at a table order from your menu and are paying later.

- 1) Press **Select Table** and then **Table #2**
- 2) Select **Guest 1**
- 3) Press one or two of the items on the menu
- 4) Select **Guest 2**
- 5) Press one or two of the items on the menu
- 6) Select **Guest 3**
- 7) Press one or two of the items on the menu
- 8) Select **Guest 4**
- 9) Press one or two of the items on the menu
- 10) Press **Save on Table #2**
- 11) Press **Ok**

Completed

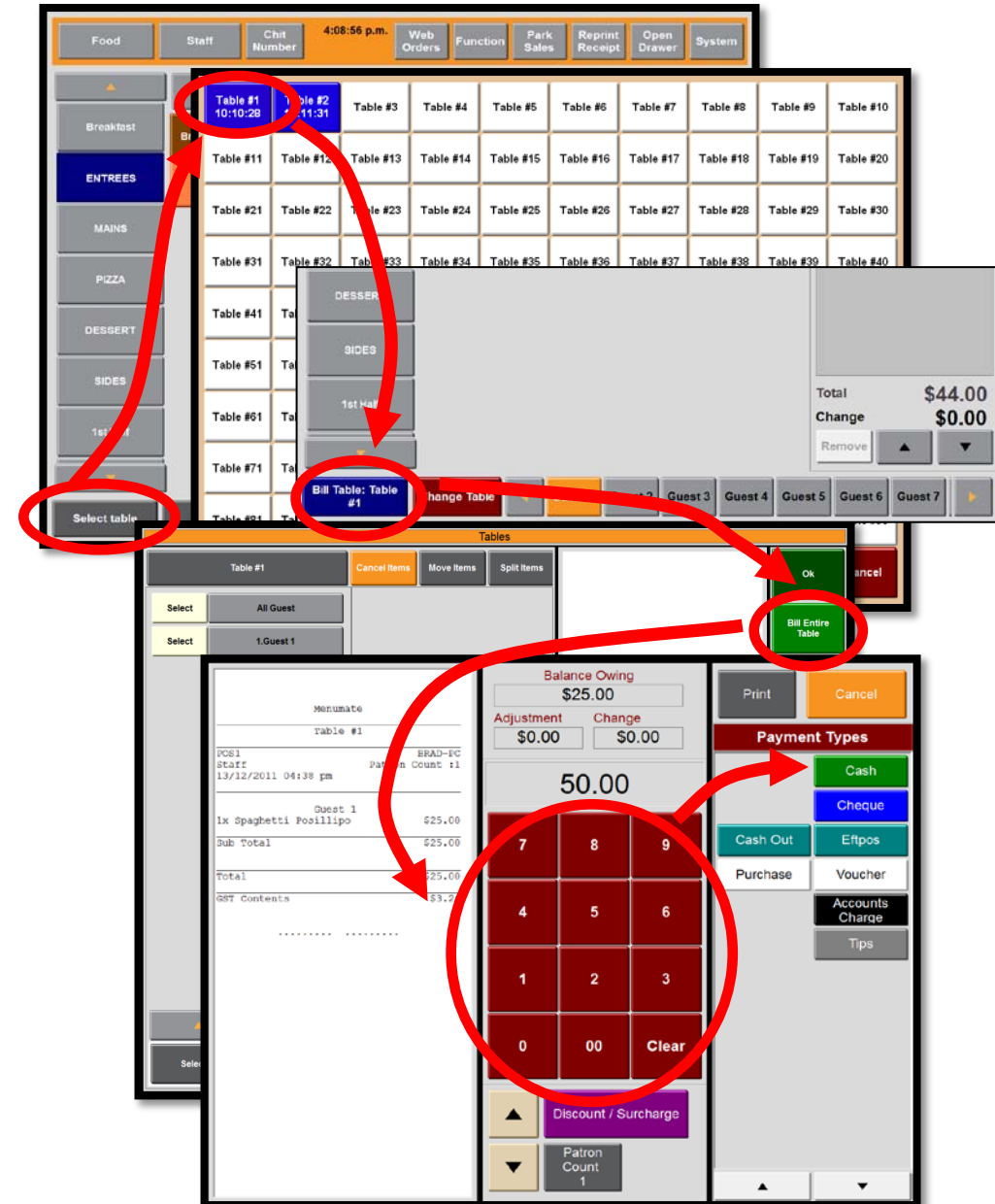
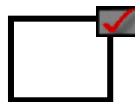


Billing a Table and Paying With Cash

A customer seated at a table and comes up to pay for the whole table with cash.

- 1) Press **Select Table** and then **Table #1**
- 2) Select **Bill Table: Table #1**
- 3) Press **Bill Entire Table**
- 4) Enter the amount the customer is tendering e.g. 50.00
- 5) Press **Cash**
- 6) Press **Close and Print Bill**
- 7) The cash draw will open and the Receipt will print.
- 8) Press **Ok**

Completed

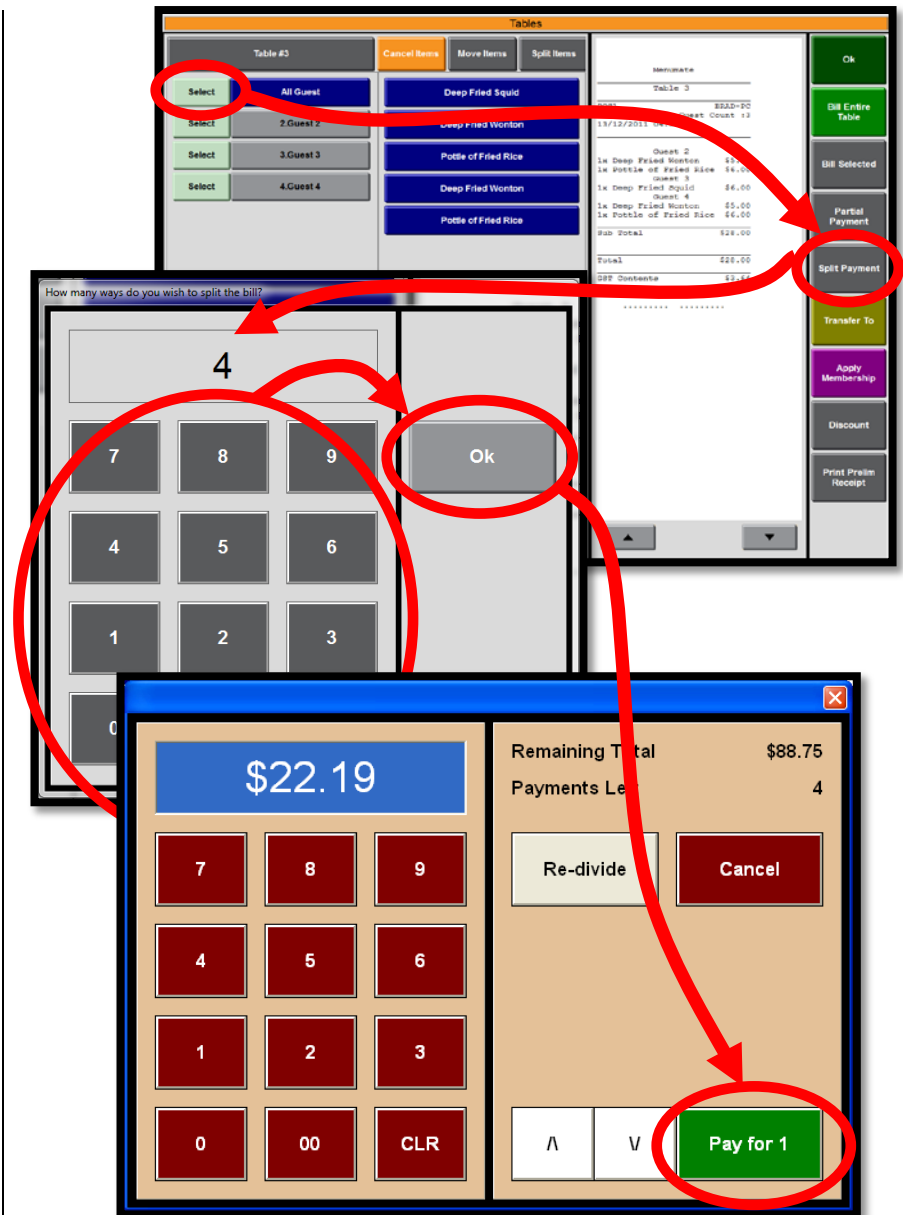


Billing a Table of Four with Each Paying Separately

Four customers seated at a table come up to pay. One pays with cash, another with EFTPOS. The third pays for the rest of the bill with EFTPOS

- 1) Press **Select Table** and then **Table #2**
- 2) Select **Bill Table: Table #2**
- 3) Press **Select** next to Guest 1
- 4) Press **Bill Selected**
- 5) Press **Cash** then **Close and Print**
- 6) Press **Select** next to Guest 2
- 7) Press **Bill Selected**
- 8) Press **EFTPOS**
- 9) Press **Close and Print Bill** then press **Yes**
- 10) Press **Select** next to Guest 3
- 11) Press **Select** next to Guest 4
- 12) Press **Bill Selected**
- 13) Press **EFTPOS** and then **Ok**
- 14) Press **Close and Print Bill** then press **Yes** and **OK**

Completed



Billing a Table by Selecting Individual Items

Two customers seated at a table come up to pay. One wants to pay for their own part of the bill, but also wants to pay for the other's drinks. The second customer pays for the remainder of the bill.

- 1) Order some items on **Table #4** with two guests who each have a food item and a beverage item, then save



For help with this see exercise on page 13 'Ordering for Four Guest on a Table' but just do two guests.

- 2) Press **Select Table** and then **Table #4**
- 3) Select **Bill Table: Table #4**
- 4) Press **Select** next to Guest 1. (This selects all Guest 1's items, turning them blue, and adds them to the bill. The **Select** button turns pastel green if any items for this Guest are selected).
- 5) Press **Guest 2**
- 6) Select the drink in the list (turning it blue)
- 7) Press **Bill Selected** and take the payment
- 8) Press **Select** next to Guest 2 to select the remaining items
- 9) Press **Bill Selected** and take the payment
- 10) Press **Ok**

Completed



The screenshots illustrate the process of billing a table by selecting individual items in the Menumate POS system:

- First Screenshot:** The 'Select' button next to Guest 1 is highlighted with a red circle. A red callout box states: "Guest 1 selected and all orders added to bill".
- Second Screenshot:** The '2.Guest 2' button is highlighted with a red circle. A red callout box states: "Guest 2 selected and items displayed".
- Third Screenshot:** The 'Glass TE WHARE RA DRY RIESLING' item is highlighted with a red circle. A red callout box states: "Guest 2's wine added to bill".

The interface shows a table with two guests, a list of items, and a bill summary on the right. The bill summary includes items for Guest 1 and Guest 2, with a total of \$44.00 and a GST of \$5.74.

Split and Move Items on a Table

Two customers seated at a table come up to pay. They want to pay half of the bottle of wine each as well as their own meals.

- 1) Order and save some items on **Table #5** with two guests who each have a food item, but Guest 1 also has a bottle of wine.

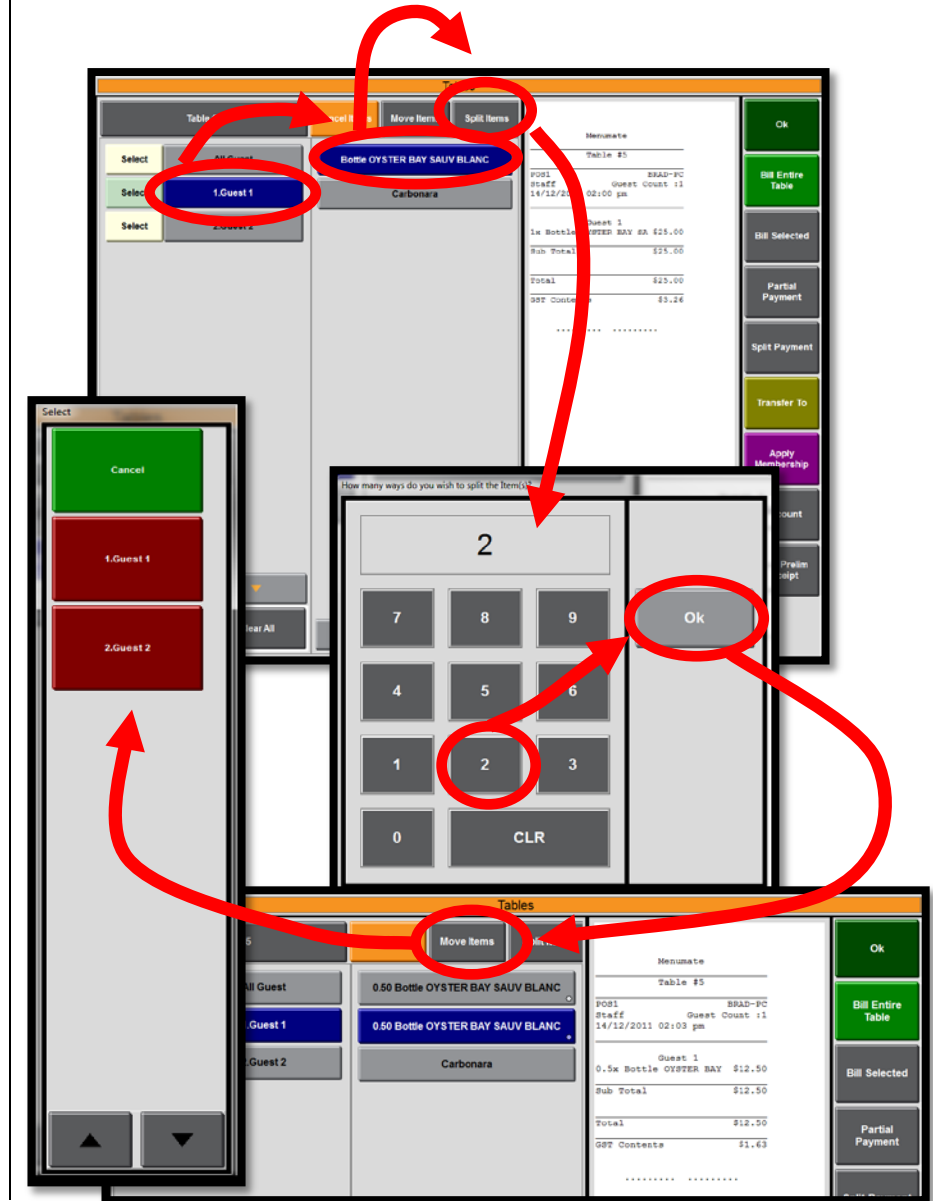
For help with this see exercise on page 13 'Ordering for Four Guest on a Table' but just do two guests.

- 2) Press **Select Table** and then **Table #5**
- 3) Select **Bill Table: Table #5**
- 4) Press **Guest 1**
- 5) Select the bottle of wine (turning it blue)
- 6) Press **Split**
- 7) Select the number of ways to split the bottle, **2**, and press **Ok**
- 8) Press **Move** and select **Guest 2**
- 9) Bill each guest separately

See page 15. 'Billing a Table of Four with each Paying Separately' for help with this.

- 10) Press **Ok**

Completed

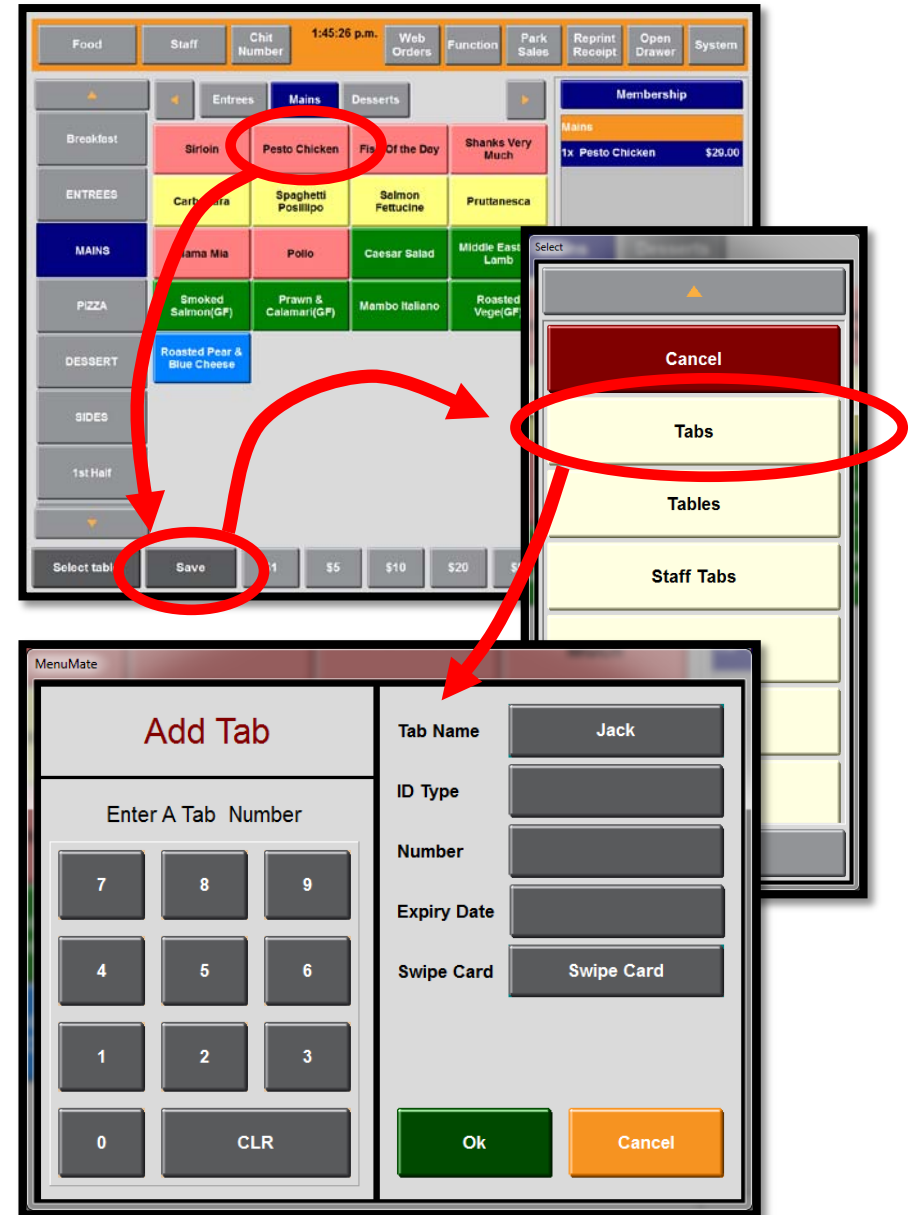


Order on a New Tab

Jack comes up to the bar and puts an item on a new bar tab

- 1) Press one of the items on the menu
- 2) Press **Save**
- 3) Select **Tabs**
- 4) Press **New Tab**
- 5) Press the button next to **Tab Name**
- 6) Type in **Jack** and press **Ok**
- 7) Press **Ok** again to save the tab details
- 8) Press **Ok** to save the order on the tab

Completed

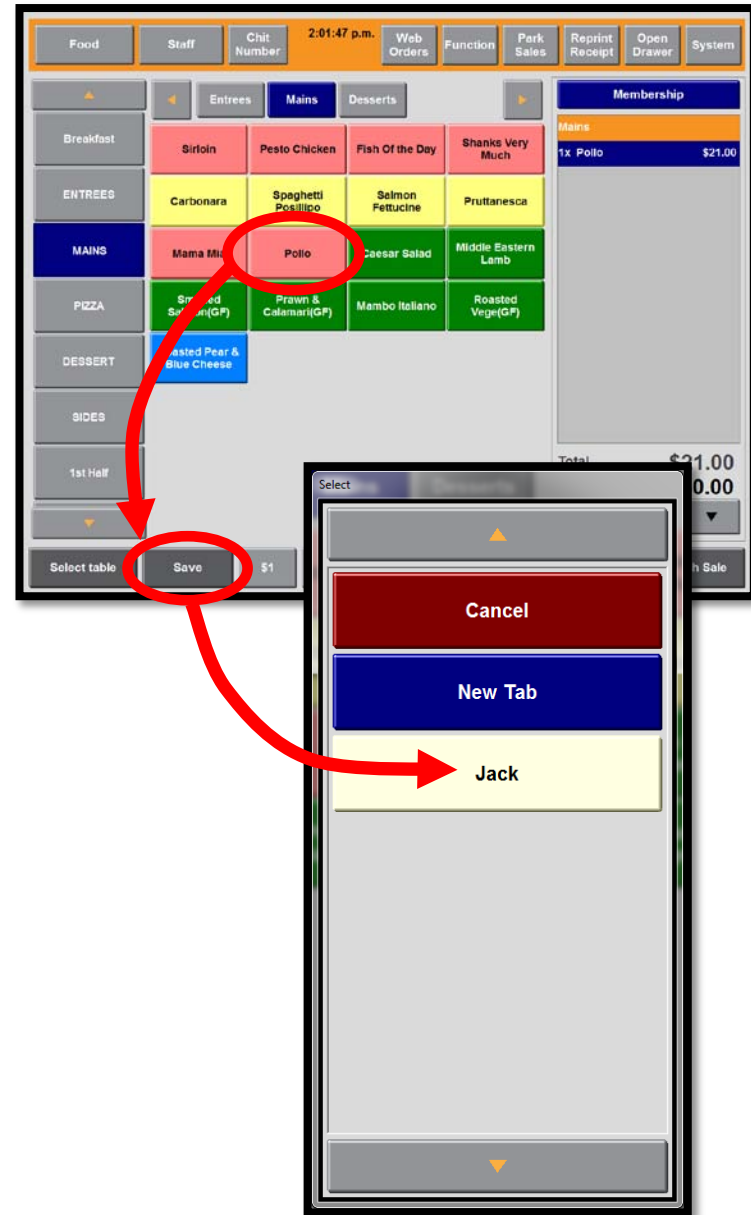
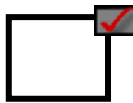


Order on an Existing Tab

Jack comes up to the bar and puts another item on his bar tab

- 1) Press one of the items on the menu
- 2) Press **Save**
- 3) Select **Tabs**
- 4) Select Jack's tab from list
- 5) Press **Ok**

Completed

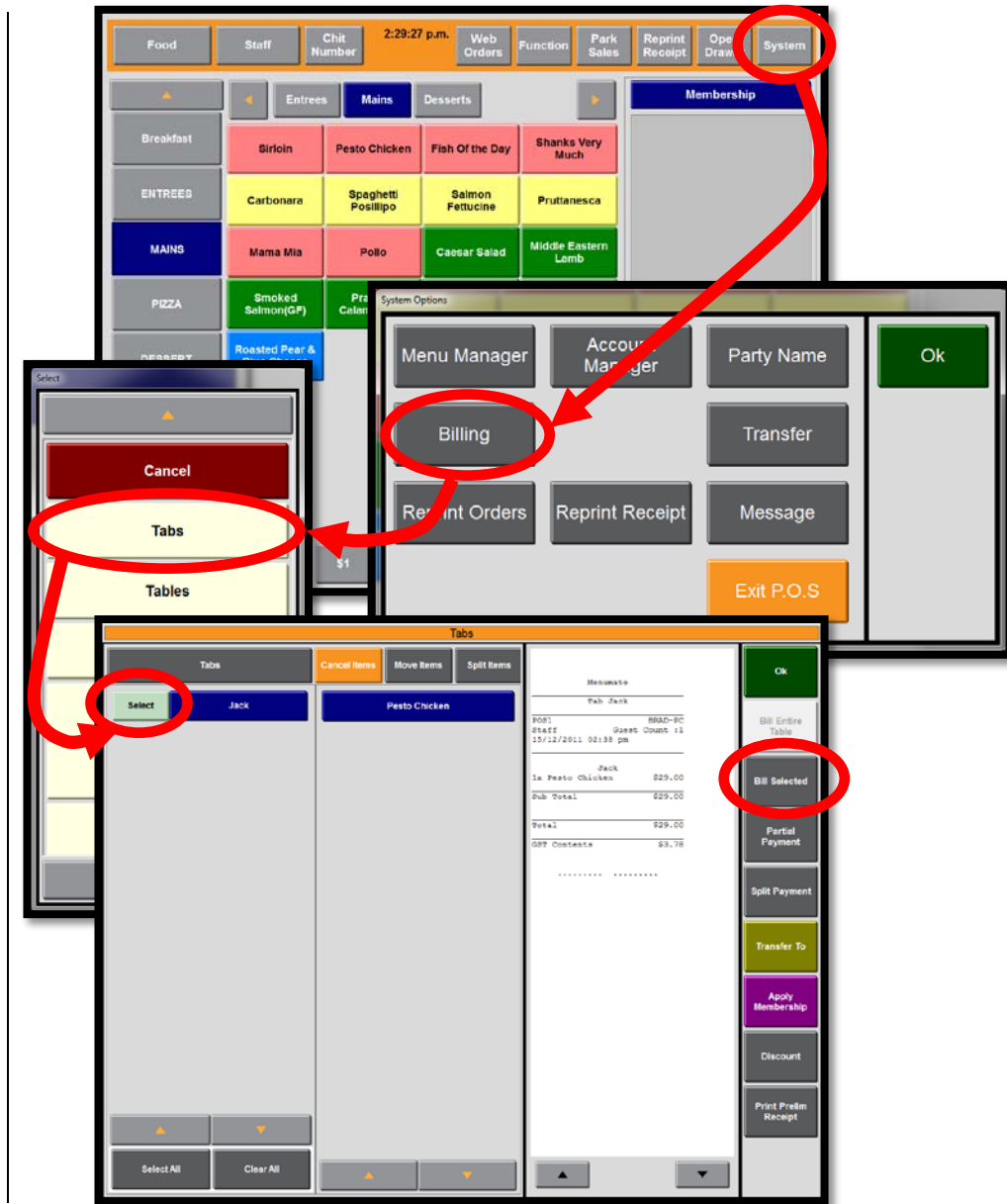
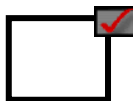


Bill a Tab

Jack comes up to the bar and wants to pay for the items on his bar tab

- 1) Press **System**
- 2) Press **Billing**
- 3) Select **Tabs**
- 4) Press the **Select** button next Jack's name
- 5) Press **Bill Selected**
- 6) Take the payment
- 7) Press **Ok**
- 8) Press **Ok** again

Completed



Add Credit to a Tab

Jill comes in and wants to put \$200 credit on a bar tab for a birthday shout.

- 1) Press **System**
- 2) Press **Account Manager**
- 3) Press **Create**
- 4) Press the **Tab Name** button
- 5) Type in **Jill** and press **Ok**
- 6) Press **OK** again
- 7) Select Jill's name on the left and press **Tab Credit**
- 8) Press **Add Credit to Tab**
- 9) Enter **200.00** and press **Add Credit**
- 10) Take the payment then press **Exit**
- 11) Press **Ok**

Completed

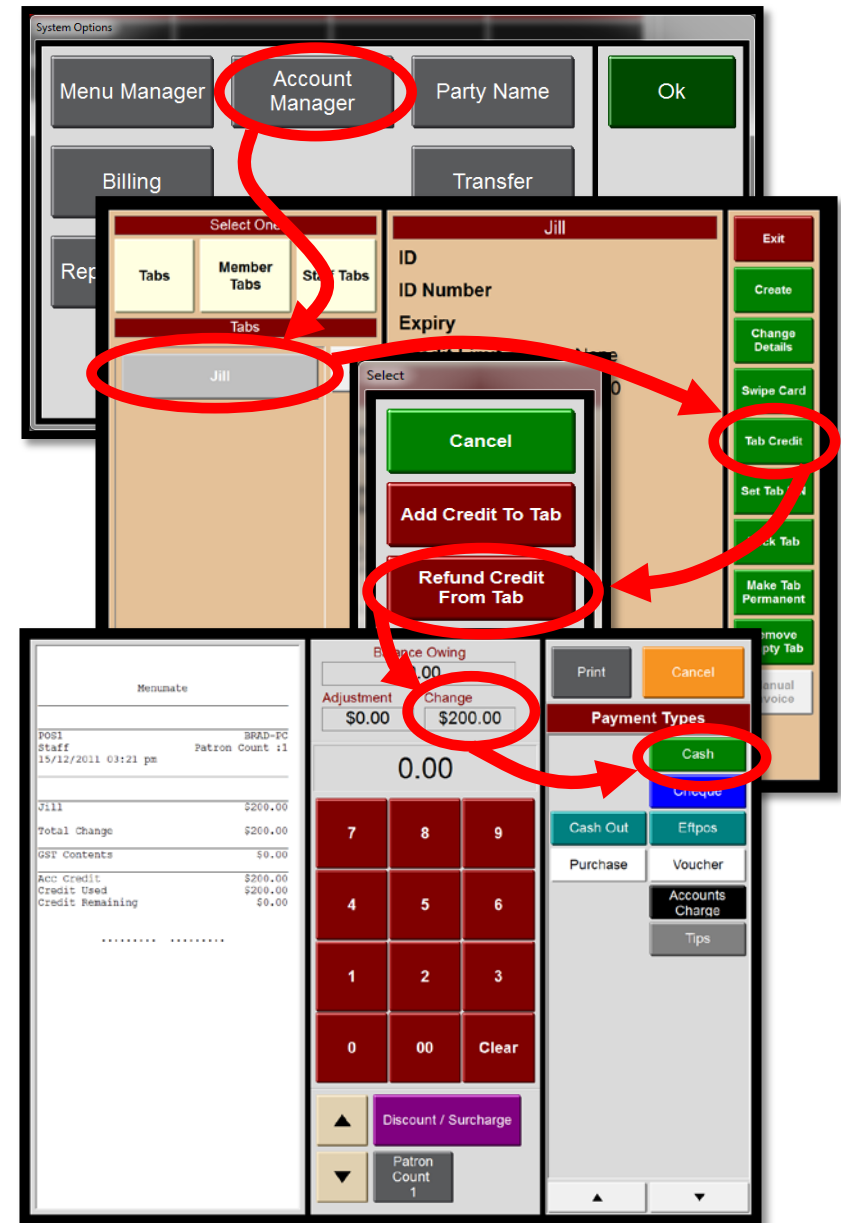


Refund a Tab with a Credit

A customer comes in and wants the remaining credit on their bar tab paid back to them.

- 1) Press **System**
- 2) Press **Account Manager**
- 3) Select Jill's Tab
- 4) Press **Tab Credit**
- 5) Press **Refund Credit from Tab**
- 6) Press **Cash**, to refund all credit on Jill's tab, or enter the amount for a partial refund
- 7) Press **Close and Print Bill**
- 8) Press **Exit**
- 9) Press **Ok**

Completed



Transfer a Tab to a Table

Jim comes in and orders a drink at the bar while they wait for a table and they put the drink on a bar tab. When the table is ready, transfer the tab to Table #7, Seat #3.

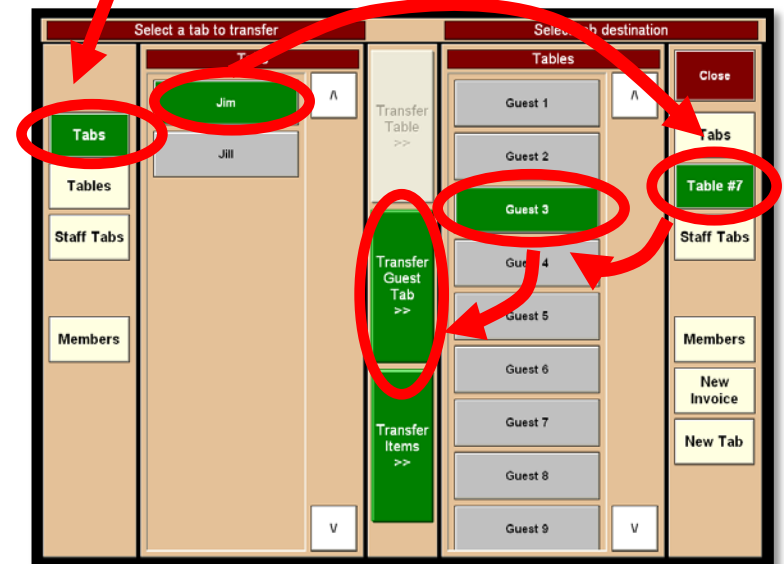
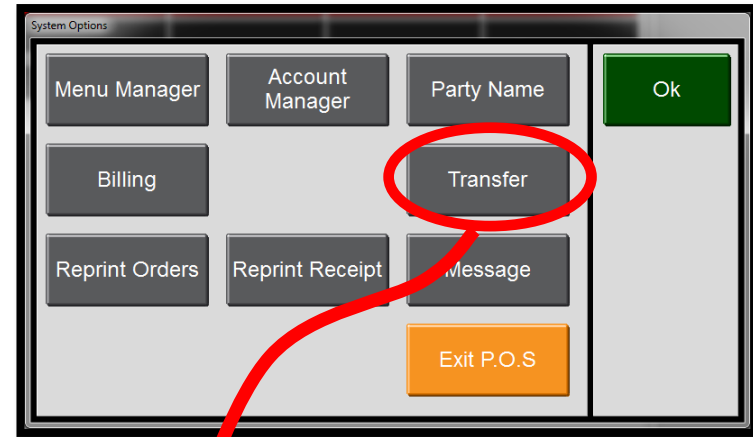
- 1) Order a drink on a new tab for Jim.



See page 18. 'Order on a New Tab' for help with this.

- 2) Press **System**
- 3) Press **Transfer**
- 4) Press **Tabs** on the left side of screen
- 5) Select Jim's tab
- 6) Press **Table #1** on the right side of screen to open the table picker
- 7) Select the table you want to transfer to, **Table #7**
- 8) Press **Guest #3** on the right side of screen
- 9) Press **Transfer Guest Tab**
- 10) Press **Close**
- 11) Press **Ok**

Completed



Transfer Table to Table

A group of customers decide they want to move to a new table.

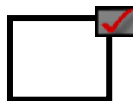
- 1) Put an order for two customers on **Table 8** and save.



For help with this see exercise on page 13 'Ordering for Four Guest on a Table' but just do two guests.

- 2) Press **System**
- 3) Press **Transfer**
- 4) Press **Table #1** on left side of screen
- 5) Select **Table #8**
- 6) Press **Table #1** on right side
- 7) Select the table you want to transfer to **Table #9**
- 8) Select **Transfer Table**
- 9) Press **Close**
- 10) Press **Ok**

Completed



Cancel Item on Bill

You have processed an order for a table and they then change their minds and would like to order something different. You will have to cancel the items that they don't want and then put on the new ones.

- 1) Save an order on **Table #10**.
- 2) Press **Select Table** and choose **Table #10**
- 3) Bill **Table #10**
- 4) Press the **All Guests** button.



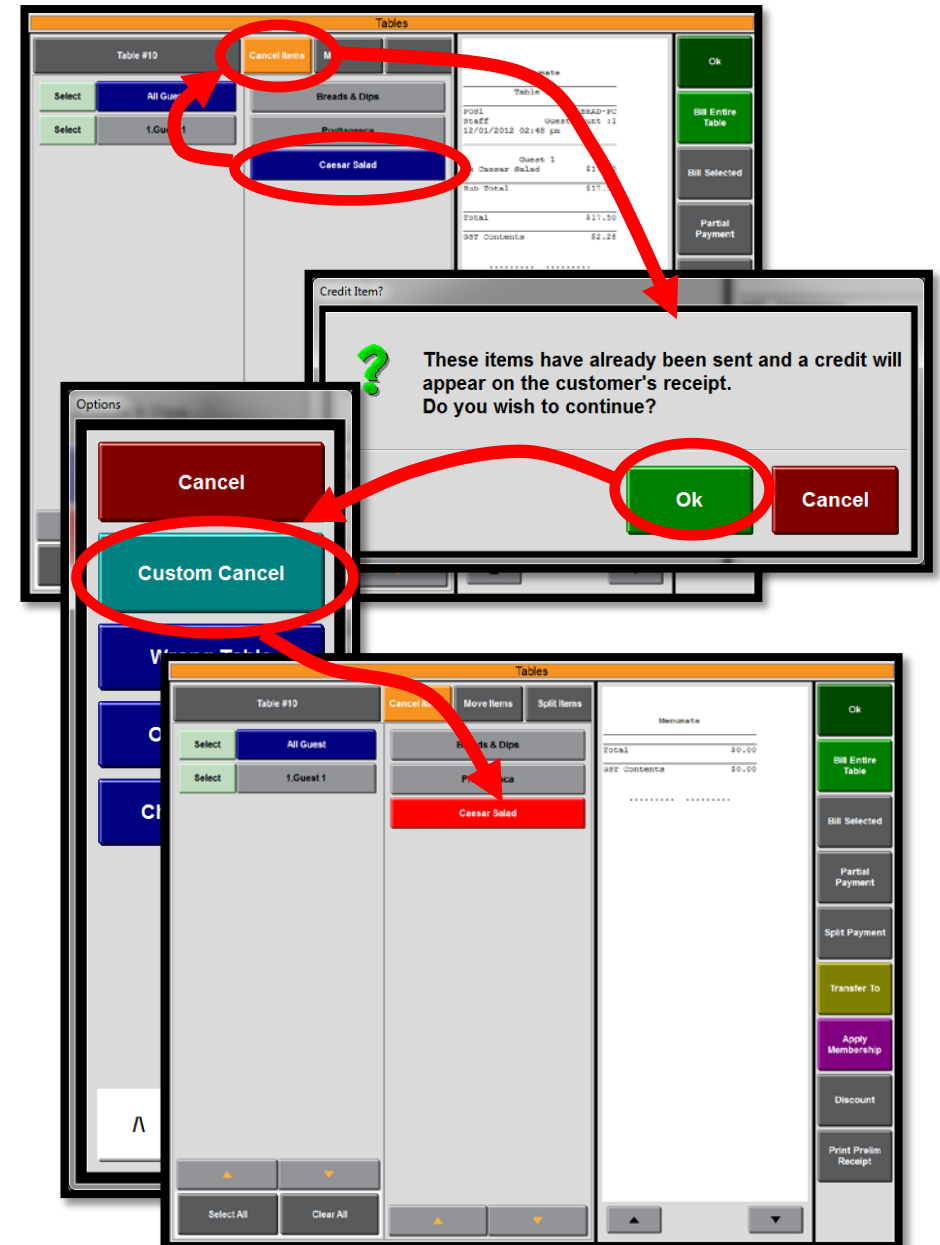
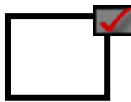
If you know the guest number then you could press their button instead.

- 5) Press on the item or items you wish to delete or 'cancel', making them blue.
- 6) Press **Cancel**
- 7) It will then say "A credit will appear on receipt. Do you wish to continue?" Press **OK** for this exercise.
- 8) Press **Custom Cancel** and type in a reason and press **OK**, or select a standard reason.
- 9) Follow the on-screen prompts.
- 10) The item will now be Red. This means it has been cancelled.
- 11) Press **OK** and continue service.



When billing this table off make sure you select the cancelled items as well so that they are removed from the system.)

Completed

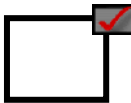


Final tidy up

Tidy up from the previous exercises before running the end of day

- 1) Bill **Table #7**
- 2) Bill **Table #9**
- 3) Bill **Table #10**

Completed



End of Day Zed Report

Doors closed and you want the end of day report.

- 1) Press **Cash Drawer**
- 2) Press **Close Till (Z)**
- 3) Select your operator name, enter your PIN number and press **OK**
- 4) Press **Close Till and Print Zed**
- 5) Press **Yes** and to reset the Chit Numbers
- 6) Press **Exit**

Completed

