INITIAL USER GUIDE

POS SYSTEM

Delivergate

Table of Contents

1. Introduction

Welcome to the *Delivergate Point of Sale (POS)* system.

This system is designed to simplify order management for restaurants. It supports takeaway, dine-in, and delivery orders with seamless integration across cashier, kitchen, and admin views. The POS empowers you to manage orders, track sales, and streamline your outlet's operations efficiently by managing users, payments, receipts, and reports in a centralized and effective way.

2. Getting Started: Login & Setup

Access to the POS system is secured by a PIN and is role-based. Before anyone can log in, the system must be correctly configured.

2.1 Initial Configuration

Before any user can log in, valid configuration settings must be entered into the POS device. This is a one-time setup per device.

- **Tenant Code**
- **Outlet Code**
- **Brand ID**

Purpose: These settings link the POS device to your specific outlet, ensuring that it fetches the correct menu, user data, and order information. Without this, the system cannot identify which users are authorized to log in.

2.2 The Login Process

Once the device is configured, users can log in using their assigned PIN. The system distinguishes between two primary roles:

- **Admin:** Logs in with a 6-digit PIN.
- **Cashier:** Logs in with a 4-digit PIN.

After a successful login, all users, regardless of their role, are first directed to the **Cashier Page**, which is the central hub for creating and managing orders.

2.3 Forgot Your PIN?

We have separate procedures for PIN recovery based on user roles to maintain security.

- **For Admins:** Retrieve only via support team.
- **For Cashiers:** Reset by contacting outlet administrator, or support if unavailable.

3. Understanding User Roles & Permissions

The features you can access depend on your role.

- **Cashier Login:** A cashier has access to all the essential day-to-day operational pages:
  - Cashier Page
  - Tables
  - Kitchen
  - History
  - Customers
  - Settings (with limited permissions)

- **Admin Login:** An admin has access to everything a cashier does, with additional privileges for management and oversight:
  - Includes all Cashier capabilities plus
  - **Reports Page:** Access to detailed sales and performance analytics.
  - **Advanced Settings:** Full control over user management within the Settings.

4. Overview of POS System Pages

4.1 Cashier Page

This is where all orders are created and managed before being sent to the kitchen.

4.1.1 Navigating the Item Menu

- **Display:** All menu items are displayed, neatly organized under their respective categories.
- **Search:** You can quickly find an item by typing its name in the search bar.
- **Filter & Sort:** Organize the menu view to your preference using filters:
  - Alphabetical (A-Z, Z-A)
  - Price (Low-High, High-Low)

4.1.2 Adding Items to the Cart

When you click on an item, a pop-up window appears, allowing you to customize it before adding it to the cart. You can set:

- Quantity (QTY)
- A quick item-level discount
- An item-specific note (e.g., "no onions")

4.1.3 Order Types

The POS supports three distinct order types:

1. **Takeaway:** For customers picking up their order. You can set a specific pickup time.

2. **Dine-In:** For customers eating at the outlet. You must select an available table from the table layout.
3. **Delivery:** For orders sent to a customer's location. You can set a delivery time, enter the delivery address, and apply delivery charges.

4.1.4 Managing the Cart

Once items are in the cart, you can easily make changes:

- **Change Quantity** of items.
- **Remove Item:** Simply swipe the item to the left to delete it from the cart.

4.1.5 Finalizing the Order

Before placing the order, you can apply order-level adjustments:

- **Order Note:** Add a general note for the entire order.
- **Coupon:** Apply a valid coupon code.
- **Discount:** Add a discount to the entire order, either as a percentage (%) or a fixed amount.
- **Customer:** Add a new customer or search for an existing one to link them to the order. *(If no customer is selected, the order will be placed as a Guest order.)*

4.1.6 The Cart Summary

The system automatically calculates the final price based on all inputs. The breakdown is clearly displayed:

Subtotal	XX.XX
Discount (if any)	-XX.XX
Coupon (if any)	-XX.XX
Service Charge	XX.XX
Delivery Charge (if any)	XX.XX
VAT	XX.XX
Total	**XX.XX**

4.1.7 Saving & Placing Orders

- **Save as Draft:** If an order isn't ready to be placed, you can save it as a draft. Draft orders are moved to the **Drafts** section on the Cashier page, organized into two tabs:
    - **Tables:** For Dine-In drafts.
    - **Tickets:** For Takeaway and Delivery drafts.

    You can select any draft order later to modify or place it.

- **Place Order:** This action finalizes the order and sends it to the kitchen. The payment process depends on the order type:

- o **Takeaway/Delivery:** The system will prompt for payment immediately. Options include Cash, Card, and Manual Card. For Delivery, Cash on Delivery (COD) is also an option.
- o **Dine-In:** Payment is not requested at this stage. The order is sent to the kitchen and linked to a table. Payment is handled later when the customer is ready to leave.

4.1.8 Hardware Integration & Receipt Printing

- **Card Machine:** For card payments, ensure the card machine is connected to the POS.
- **Cash Drawer:** If a cash drawer is connected, it will automatically open when a cash payment is processed.
- **Receipts:** Upon placing an order, receipts are printed based on your settings. You can configure which receipts to print (e.g., Main Receipt only, or Main + Kitchen Receipt).
  - o **Main Receipt:** Contains full order details, pricing, and outlet information.
  - o **Kitchen Receipt (KOT):** A minimal receipt showing only essential information for the kitchen staff (e.g., Order ID, Table #, Item names, quantities, notes).

4.2 The Kitchen Page

This page provides a real-time view of all active orders. Orders move through four statuses, which can be updated manually by the staff:

1. **Queue:** New orders appear here first.
2. **Preparing:** The kitchen has started working on the order.
3. **Ready:** The order is cooked and ready for pickup or delivery.
4. **Served / Dispatched:** The order has been given to the dine-in customer or sent out for delivery.
- **Sync with Admin:** Status changes are reflected in real-time on the admin side.
- **Update a Dine-In Order:** For active dine-in orders, an **Update** button is available. Clicking it reloads the order onto the Cashier page, allowing you to add more items.
- **Completing an Order:**
  - o **Takeaway:** Can be completed from the 'Ready' status.
  - o **Delivery:** Can be completed from the 'Dispatched' status. If the payment method was COD, the system will now prompt for payment.
  - o **Dine-In:** Can be completed from the 'Served' status. Clicking 'Finish' reloads the order onto the Cashier page to process the final payment.

Once an order is completed, it is removed from the Kitchen Page and moved to History.

4.3 The Table View

This page offers a visual layout of your outlet's tables, showing the status of each:

- **Available:** The table is free.

- **Reserved / Served:** The table is occupied with an active order. You can click on any occupied table to view its order details, or to initiate an **Update** or **Finish** action.

4.4 History Page

View a complete record of all past orders. You can filter by date and see order status (Completed, Cancelled, Missed, Declined etc.). By clicking 'View', you can see the full order details and have the option to reprint the receipt.

4.5 Customers Page

This is your customer relationship management (CRM) hub. You can:

- View a list of all customers.
- Search for specific customers.
- Click on a customer to view their contact details and a summary of their order history.
- Edit customer information.

4.6 Reports Page (Reporting & Analytics (Admin Only))

The **Reports** page is a powerful tool for business analysis, accessible only to Admins.

- **POS Orders Dashboard:**
  - Filter by a date range to see analytics for orders placed directly through the POS.
  - Key metrics include: Total Orders, Total Revenue, Total Cash Orders, Total Card Orders, etc.
- **All Orders Dashboard:**
  - Provides a consolidated view of **all** orders, including those from the POS and integrated third-party platforms.
  - Filter by date range to get a complete picture of your outlet's performance across all sales channels.

4.7 The Settings Page: System Configuration

This page allows you to configure the POS and manage user accounts.

4.7.1 General Settings (Admin & Cashier)

- **Platform Settings:** Easily enable or disable integrations with third-party order platforms using a simple toggle button.
- **Printers:** Configure and manage multiple printers.
- **Card Machines:** Set up and test your card payment terminals.
- **Cash Drawer:** Connect and manage your cash drawer.
- **Contact Support:** Quick access to support contact information.

4.7.2 User Settings (Cashier View)

A cashier has limited access focused on their own activity:

- View their general profile information.
- View their own shift details (order count, total sales, cash/card totals) for a selected date range.
- Check their login/logout times.
- Request a PIN change from an administrator.

4.7.3 User Settings (Admin View)

An admin has full oversight and management capabilities:

- View their general profile information.
- View detailed shift reports for **any** cashier or admin.
- See the total sales amount for the entire outlet within a specific date range.
- Manage all user accounts.
- **Reset the PIN for any user.**

5. Incoming Orders (Third-Party Platforms)

Orders from third-party platforms (e.g., Uber Eats, Deliveroo) appear in the **Incoming Orders** section of the POS with an audible alert. The cashier can review details and either **Accept** or **Reject**.

- **Admin Side Actions:**
  - **Accept** → Order is sent to the POS Kitchen Queue.
  - **Reject** → Order is removed from POS Incoming Orders.
  - **Cancel** → Order is cancelled and disappears from the POS Kitchen Queue.
  - **Ready** → POS updates the order status to *Ready*.
  - **Complete** → POS updates the order as *Completed* in the history page.
  - **Missed** → If the order is not handled within the required time, it is flagged as *Missed* and both Admin and POS reflect this status.
- **POS Side Actions:**
  - **Queue** → New accepted orders arrive here automatically.
  - **Preparing** → POS staff can move the order into *Preparing*; Admin side sees this update instantly.
  - **Ready** → POS marks the order as *Ready*; Admin side also updates to *Ready*.
  - **Served/Dispatched** → POS completes the order; Admin sees the status updated to *Completed*.
- **Real-Time Synchronization:**
  - Every action taken by Admin is reflected immediately on the POS.
  - Every status update from POS is mirrored on the Admin side.

This ensures both **POS users** and **Admin users** always work with the same up-to-date information, avoiding duplicate handling or missed updates.

6. Logout

- **Lock:** Ends your session completely. This is recommended at the end of a shift.