onePOS System Training Manual

Content

Welcome!

Hello and welcome to our onePOS training course. We are excited to be business partners and look forward to helping you achieve your goals.

Please note: This course is not a passive endeavor. Active participation is key to your success both in daily use and in leveraging the power of the onePOS system to grow your business. This course consists of lecture material, homework assignments, and exercises to familiarize your team with the onePOS system. While it was designed to be taken at your own pace, this course is a prerequisite to be completed before a location may be taken live.

onePOS believes in empowering you as owners and operators thus, we've developed this course to ensure your management team can get the most from the hardware and software your business needs to thrive. After completion, managers will have opportunities for one-on-one personal training, so please take notes and bring any questions or concerns with you.

Thank you again.

-onePOS University

Pre-Training Checklist

Prior to training, certain criteria must be met to ensure a successful experience. The onePOS University team will help coordinate this process:

- ✅ Kickoff Call

- ✅ Required Onboarding Paperwork Signed and Submitted

- ✅ All Floor Plans and Customer-facing Menus Must be Provided to onePOS

- ✅ Minimum onePOS Equipment On-site: Terminal, Receipt Printer, EMV Reader

- ✅ Remote Access Established

- ✅ onePOS Software and Database Installed on Terminal

- ✅ Manager credentials for login

onePOS Overview

The aim of this course is to ensure you are proficient in the use of the system to train your staff. For reference, the onePOS system is easily divided into three components:

Front of House

The terminal application is where staff conduct the business of the location.

Management Console

The Management console is where managers oversee daily operations.

Hardware

The hardware component consists of the computer terminals, printers, credit card readers, etc..

Front of House Terminal

General POS Use & Front of House Screens

The front of house (FOH) screens are where 99% of interactions with onePOS take place. This is where employees clock in, servers ring in food and beverages, bartenders start tabs, and hosts place to-go orders.

We designed the interface to feel familiar and intuitive. However, if this is your first time using onePOS, taking the time to familiarize yourself with the content of this section could prove crucial to your success.

Clocking In

Touching the terminal screen when it displays the screen saver or blank screen reveals the sign-on keypad.

- Entering a manager number and pressing done or swiping a card will bring up the manager menu.
- Using a FOH employee number/card will reveal the clock in screen or the dining room that employee is clocked into.
- Using a BOH number/card will only allow access to the clock in/out screen.

BOH Employees clock out the same way they clocked in. FOH Employees clock out from the employee menu.

New databases include a server and bartender template employee. You can practice with the system using the login numbers 1 or 2 respectively.
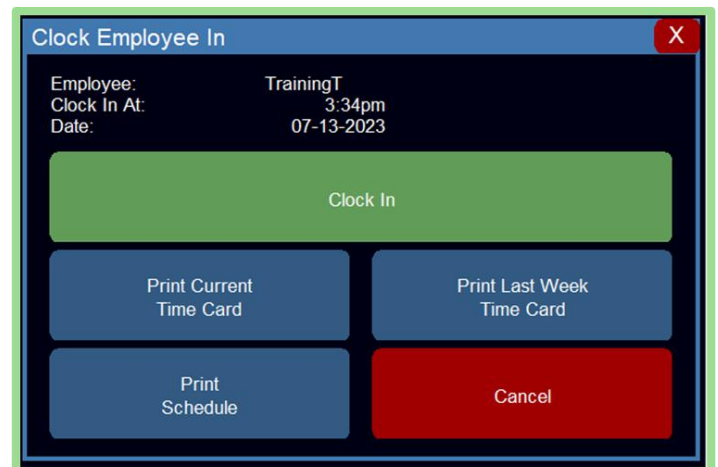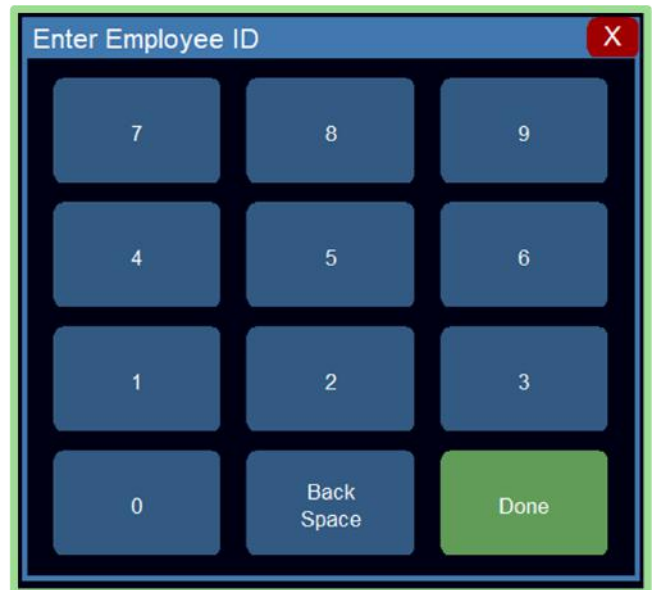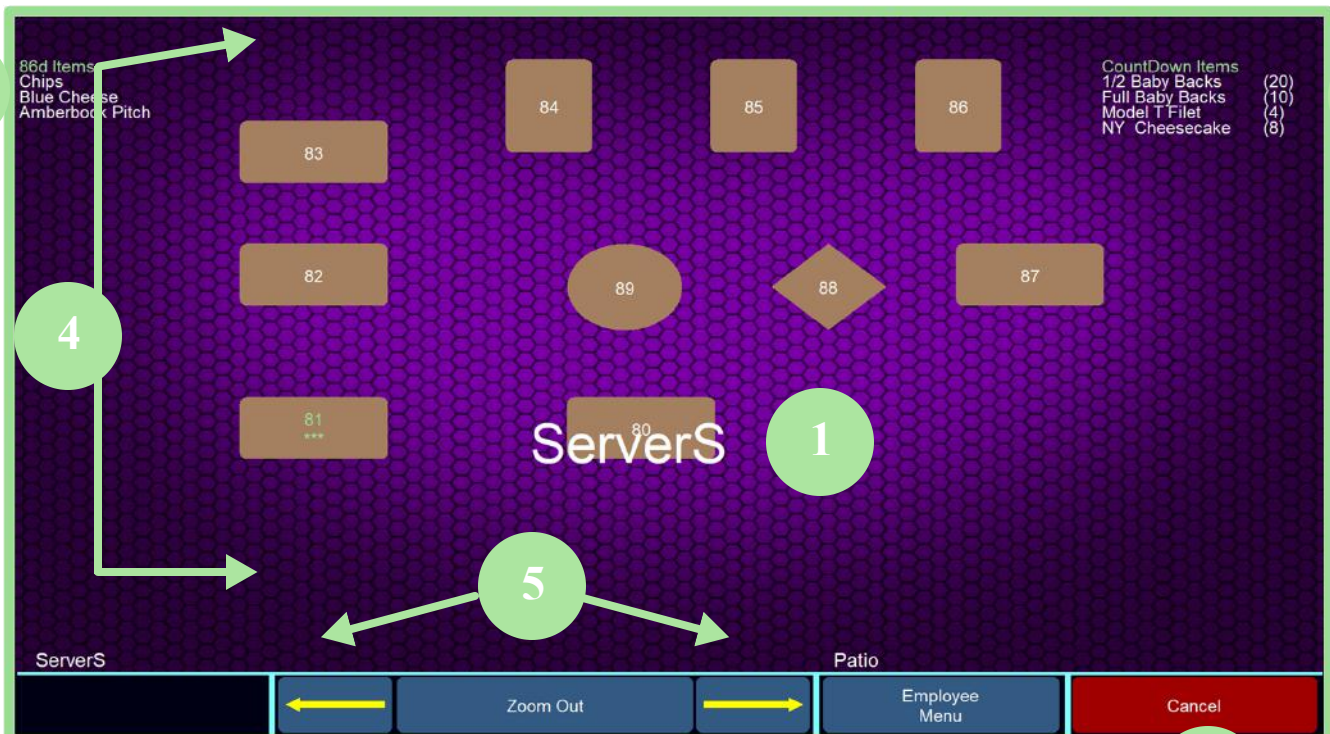
Dining Areas

When FOH staff clock in for their shift, they will be prompted to select a dining area. Dining areas represent the different physical parts of a bar or restaurant and can be configured independent of one another. The example below is an example of a dining area configured to mimic how the tables are laid out in the restaurant.

Points of Interest

1. Employee Signed into the Terminal
2. List of Unavailable Items
3. List of Items with Limited Quantities
4. Tabs or Tables
5. Changes the Dining Area Being Viewed
6. Employee Functions
7. Signs out of the Terminal

Ordering

Touching an open tab(le) on a dining area screen will start a new check and take you to the ordering screen. When you start a check, it will prompt you for a guest count or a name for the tab. Enter appropriately.
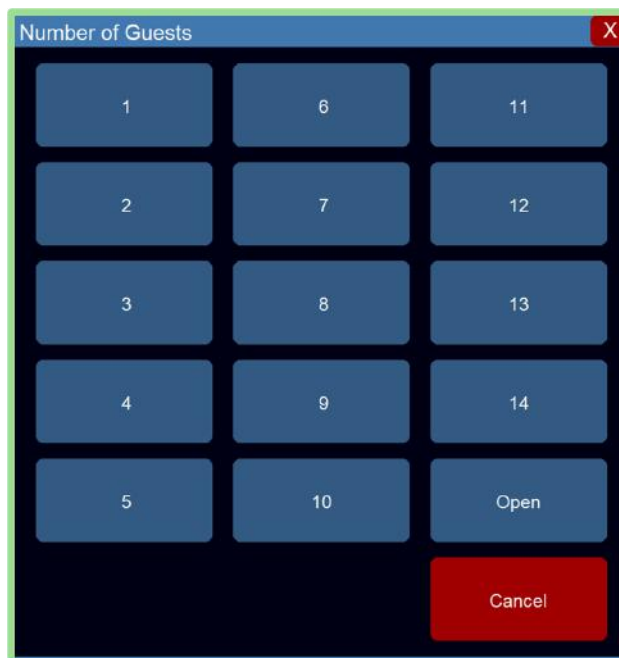
The Ordering Screen

Ring all ordered merchandise. Press 'SEND' to commit the items to the check and send the order to print out in the kitchen. The check will always be able to be accessible until closed.

Use 'Check Options' to make modifications to the entire check such as: changing guest count, splitting items, moving items to different guests, renaming the tab, etc..

When the customer is ready for the bill, go to 'Print Check.' Then select which guests to print a check for (you can select multiple if they want to share/combine a bill) then press "Print No Sub" to print out the check. You can press the same button before highlighting any guests to print the entire check for the table.

After the customer has presented their method of payment, go to 'Close Check.' Choose their payment method, enter the amount they are paying, press 'OK'.

Running Check

This part of the screen shows the items that have been rung in for all guests. Items are able to be deleted or modified until they are committed to the check by being sent or printed. Once committed, items must be voided or comped to be removed.

Pertinent information about the tab(le) is displayed along the top of this section.

Below that are all of the items that have been rung in chronologically. To the right of the item name is the quantity ordered, the price for the total quantity, and the guest it was ordered for. Touching the names of items before they're committed allows items to be deleted or modified.

Tax, subtotal, total, and quick-payment keys (if configured) are displayed along the bottom of this screen section.

Table:	31	Guests:	1	1:37p	
Item			Qty	Price	G#
Coke			1*	2.75	1
O-Ring			1*	10.99	1
Louisiana Sauce					
Jack Chicken			1*	14.99	1
French Fries.Cin Apples					
Fudge Brownie			1*	7.99	1

Tax: 2.57   Ttl: 39.29

Merchandise Items & Screen Groups

Below are the items that are in the screen group that is currently selected. This example shows all of the blue merchandise items in a screen group named "Drinks." Simply touch the item to add it to the order. Touch one of the black screen groups on the right to change screens. 'Main' shows all the screen groups assigned to that menu.

*Note: Depending on the setup, most new databases come setup to advance to the next guest after each item. Keep this in mind when training or considering how the site will operate.

Guests & Check Options

This section of the screen shows the guest list for the check, the white one is currently selected. Below that are the options for the tab.

- **Delete Item** - Deletes the last item or all items currently highlighted.
- **Quantity** - Changes the how many of the highlighted item will be ordered.
- **Check Options** - Displays all other functions that can be performed on the check.
- **Print Check** - Navigates to the print screen to select how the check should be printed.
- **Close Check** - Navigates to the close screen to pay for the check.
- **Exit** - Exits the check and/or signs an employee out of the terminal.
- **Send** - Sends the order to the kitchen.
- **Delayed Send** - Sends the order to the kitchen after the selected time delay.
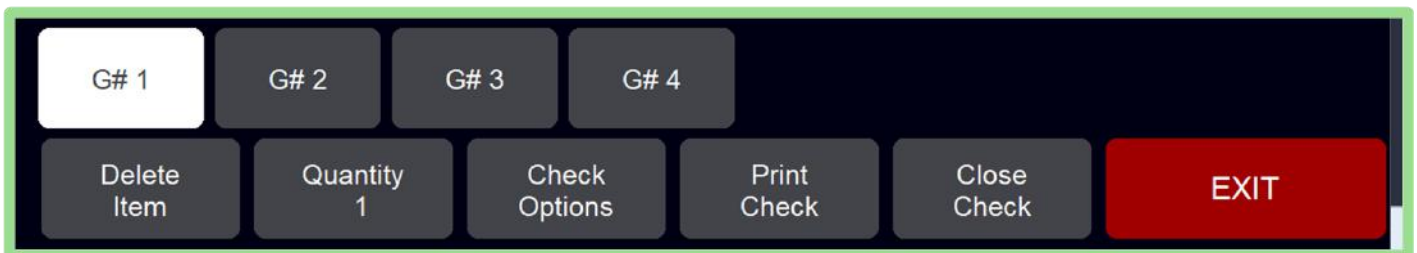
Check Options

The 'check options' screen is accessed from the bottom menu inside a check.

This is where all functions outside of ringing, printing, and closing a check take place.

Check Options Key

- **Re-order** – Time-saving button that re-rings highlighted items for repeat orders.
- **Split item** – A prompt that allows highlighted items to be split/unsplit amongst multiple guests.
- **Change guest** – Used to move highlighted items from one guest to another.
- **Change quantity** – Changes the number of an item that will be sent to the printer. Use with caution.
- **Change price** – Changes the price of an item for that check only. Requires Manager approval.
- **Recipe lookup** – If programmed, will display the recipe for the highlighted item.
- **Change guest count** – Changes the number of guests on the tab(le).
- **Transfer check** – Prompts to select guests to be transferred to another check or table.
- **Move/Merge check** – Move check to an open tab(le) or merge with an in-use table.
- **Send to cashier** – When using cashier functionality, this will reassign the ticket to the cashier.
- **Set Gratuity** – Applies a gratuity to a tab(le).
- **Set tab name** – If applicable, sets or changes the name associated with the tab(le).
- **Re-Send Order** – Sends the order to the printer(s) again

| Item	Check
Re-Order	Change Guest Count
Hold	Transfer Check
Split Item	Move / Merge Check
Change Guest	Send To Cashier
Change Quantity	
Change Price	
Recipe Lookup	Set Gratuity
Bartender Guide	Set Tab Name
	Re-Send Order

Check Options Key

- **Sell gift card** – A tab(le) must be started to sell a gift card.
- **House account credit** – Applies a credit to a house account for a customer to pay later.
- **Update status** – Changes the status of the ticket.
- **Assign referral ID** – Assigns a business or organization set up in Manager Console to the check.
- **Assign Customer ID** – Assigns a customer to the check whose information is stored locally on the system.
- **Void** – Cancels items that were never made.
- **Comp** – Removes already made items from the check.
- **Discount** - Applies a discount to highlighted items.
- **Coupon** – Applies a coupon to applicable or highlighted items.
- **Refund** – Creates a negative transaction to refund a customer's money.
- **Tax exempt** – Removes the tax from Highlighted items.

Employee Menu

The employee menu displays the functions available to servers, bartenders, hosts, or other FOH employees. It is accessed from the bottom of any of the dining areas as displayed previously. BOH employees will not have, nor need, access to this menu.
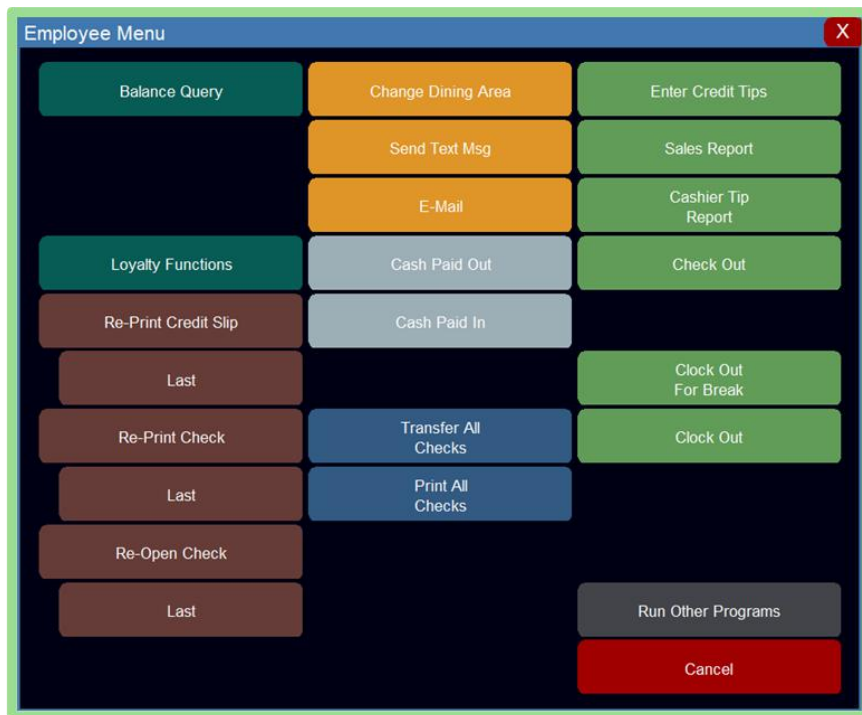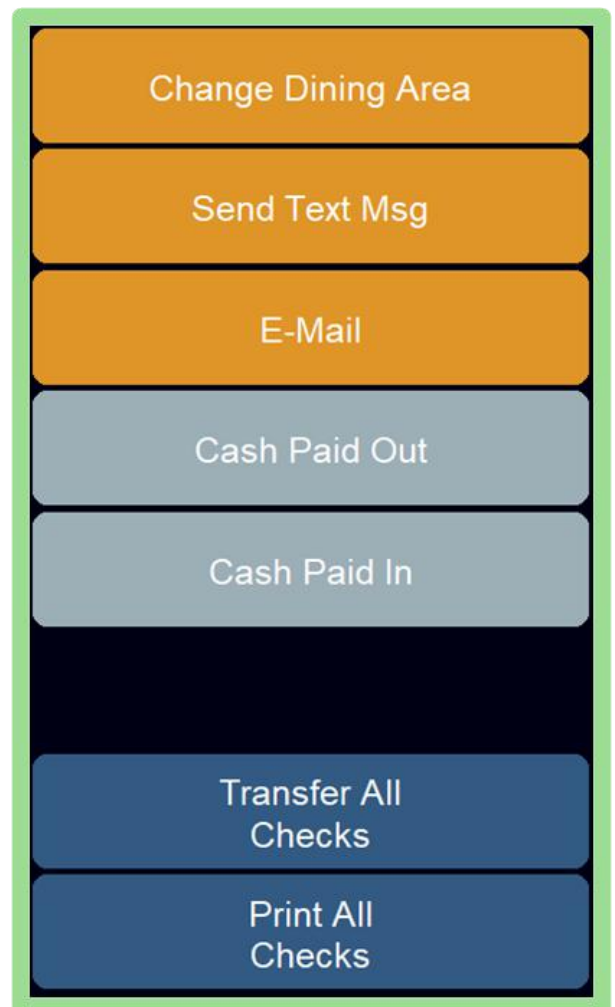
Employee Menu Key

- **Balance Query** – Checks the balance of a gift card.
- **Loyalty Functions** - Allows a customer lookup to view their loyalty account
- **Reprint credit slip** – Choose a closed check to print the "customer copy" again for a guest.
- **Reprint check** – Choose a closed check to print again for a guest.
- **Reopen check** – reopen an already closed check with manager approval.
- **Last** – performs the function of the button above for the last closed check/receipt/slip.
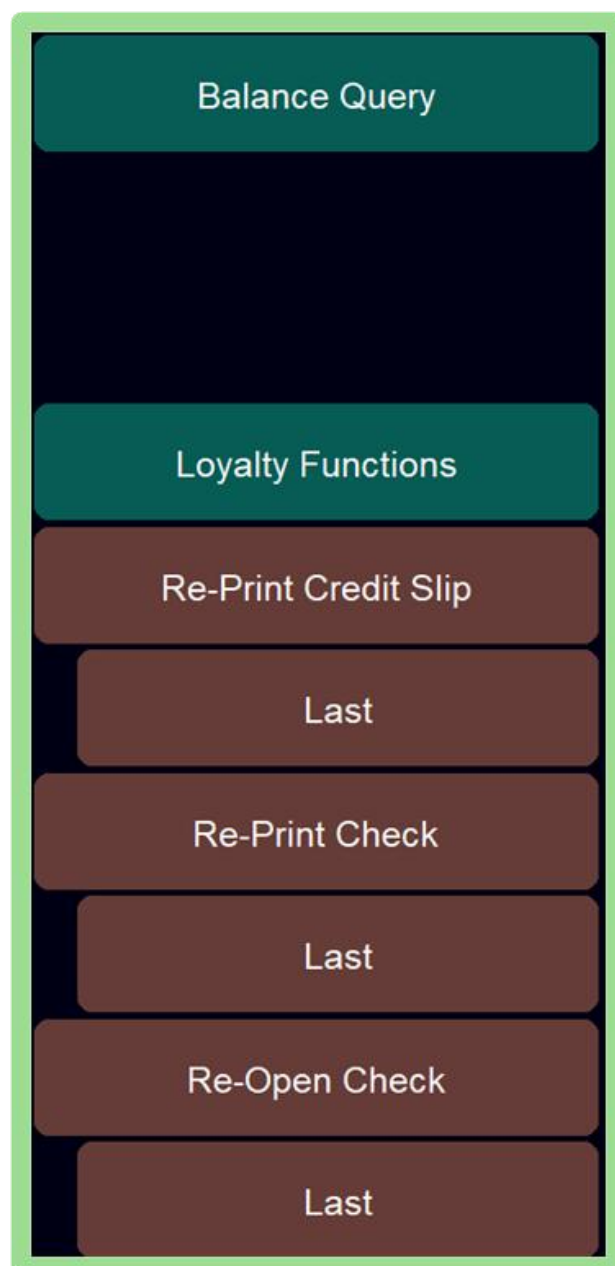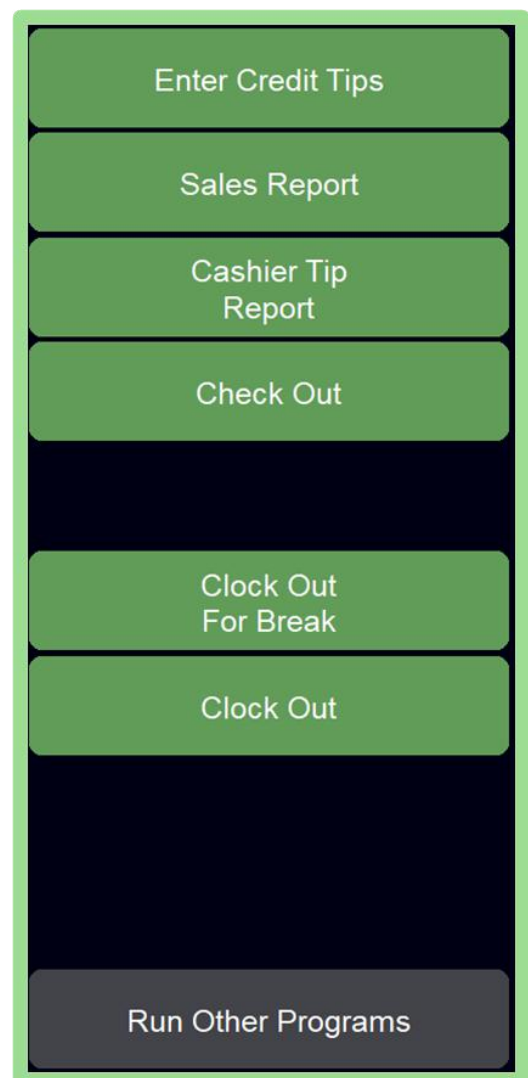
Employee Menu Key

- **Change dining area** – Changes the dining area the employee is clocked into.
- **Send text message** – Employees can type messages and send them to specific printers.
- **E-Mail** – Allows the employee to check messages sent to them via the manager console.
- **Cash Paid out** – Petty cash coming out of the drawer or the active employee's bank. Typically, in the use of paying a vendor.
- **Cash Paid in** – Petty cash coming into the drawer or the active employee's bank
- **Transfer all checks** – Allows an employee to transfer all open tab(le)s to another employee.
- **Print all checks** – Prints guest checks for all open tab(le)s.

Employee Menu Key

- **Enter credit tips** – Allows staff to enter credit card tips for the checks they've closed.
- **Sales Report** – Prints the employee's current sales figures for the day.
- **Cashier Tip Report -** Prints a report to show the cashier the tips owed to servers.
- **Check Out** – Prints a detailed summary of employee metrics and transactions starting with the first sale since the last check out.
- **Clock out/for break** – Stops the time clock until the next time the employee clocks in.
- **Run other programs** – Opens programs associated with onePOS like MC or the calculator.

Enter Credit Tips

Sales Report

Cashier Tip
Report

Check Out

Clock Out
For Break

Clock Out

Run Other Programs

Enter Credit Tips

From the employee menu:

- Select 'Enter Credit Tips'
- Press the yellow arrow next to the transaction to input the tip.
- Transactions with tips disappear from this screen. 'Show all' brings them back.
- The three search buttons allow staff to search for a particular transaction.
- The yellow arrows at the bottom navigate through pages of transactions.
- Forced is "offline," will not pay the restaurant without Transafe intervention.
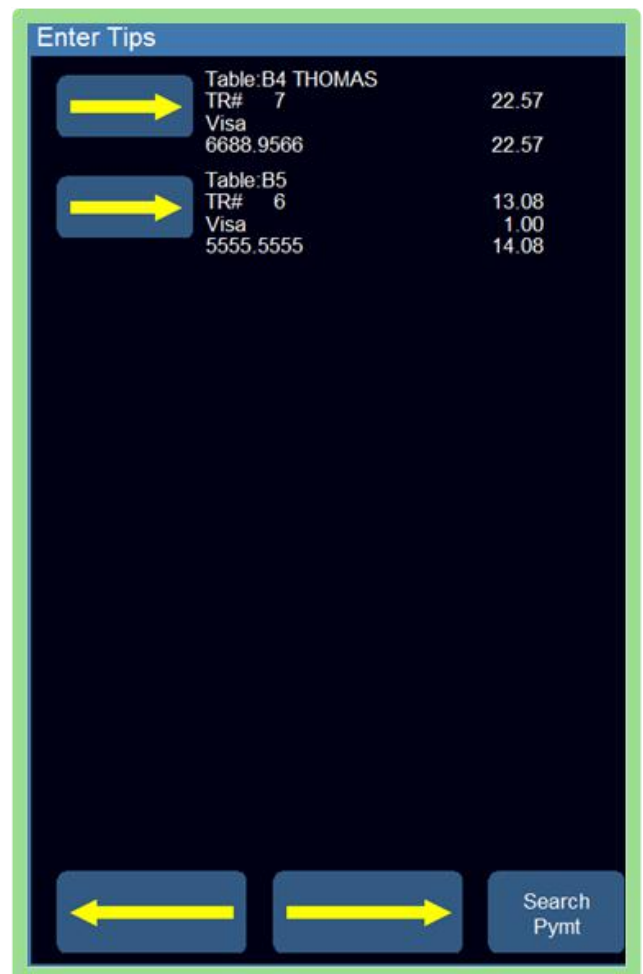
Employee Checkout

Checkouts are completed when a FOH employee is done taking orders for the shift or day. Checkouts are the summary of the transactions an employee completes from their first transaction until checkout.

Checkouts subtract credit tips from cash sales to produce the "Cash Due." A positive number indicates the employee owes the house while a negative indicates the opposite. Every location handles checkouts differently. This is another great topic to bring up with your onePOS University trainer.

To perform a check out, simply press the 'Check Out' button from the 'Employee Menu.' Checkouts completed by mistake are reopened from the 'Reopen Check' button in the employee menu.

```
Emp:  Server S
Date: 06-06   1:42pm  Check Out # 1
----------------------------------------
Net Sales          Amount    %Net
--------------     --------  -------
Food                 83.13   100.0%

Gross Sales          83.13   100.0%
-Voids                0.00     0.0%
-Refunds              0.00     0.0%
=Net Sales           83.13

-Comps                0.00     0.0%
-Discnts              0.00     0.0%
-Coupons              0.00     0.0%
=Net/Net Sale        83.13   100.0%

Other Collected
Taxes                 8.11

No Sales:        1

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

Tenders            Ideal   Count
--------------     ------- -------
Cash                46.85      3
CreditCard          51.38      3
----------------------------------
Cash                46.85      3
-Credit Tips         6.99
▧CASH DUE     39.86


Card Type       Sales Tip/Chg  Total  Mgr
--------------  ------- ------ ------- ---
xxxx-CreditCar   26.31   3.89   30.20 ___
xxxx-CreditCar   14.25   3.00   17.25 ___
xxxx-CreditCar    3.83   0.10    3.93 ___

[  ] FOH_Checked_Out
[  ] BOH_Checked_Out
[  ] Silverware

       *** End of Report ***
```

Homework #1

Homework assignments will familiarize you with the system, as well as provide an opportunity to consider the needs of your operation. These assignments are vital to your success. Notes, insights, questions, and requests that come from these assignments should be discussed with your onePOS University technician.

1. Clock in using a server or bartender number.
2. Practice ringing in orders in more than one dining area.
  a. Start multiple tables with different guest counts
  b. Touch all merchandise items to check for item correctness
  c. Use modifiers and change sides
  d. Practice printing and closing checks
  e. Be sure to utilize all the 'check options' functions, especially mgmt. functions
3. Print a sales report
4. Run a checkout
5. Clock out
6. Have any lead staff/trainers complete this assignment.

Manager Menu

The 'Manager Menu' offers higher level functions for managers and key employees to run their shifts. Management will not have to spend much time in this menu, but familiarizing yourself with the options will prove helpful.

The manager menu is accessed by sliding a manger's card or entering their number.

Manager Menu Key

- **Use this I.D.** – Logs into the FOH dining areas like a server or bartender.
- **Enter I.D. by hand** – Allows a manager to log in as an employee with manager permissions.
- **Select employee from list** – Shows a list of all employees and allows a manager to log in as an employee with manager permissions.
- **Select active employee** – Shows all clocked in employees and allows a manager to log in as an employee with manager permissions.
- **Assign scan card** – Allows managers to assign onePOS access cards to employees to replace sign-on numbers.
- **Assign cash drawer** – Select a clocked-in employee to use a drawer attached to *that* terminal.
- **Reprint historical check** – Allows guest checks from a specific date to be reprinted.
- **Reopen check** – Allows managers to reopen any closed check.
- **Reprint check** – Allows managers to reprint any guest check.
- **Query by table** – Shows all open tabs/tables.
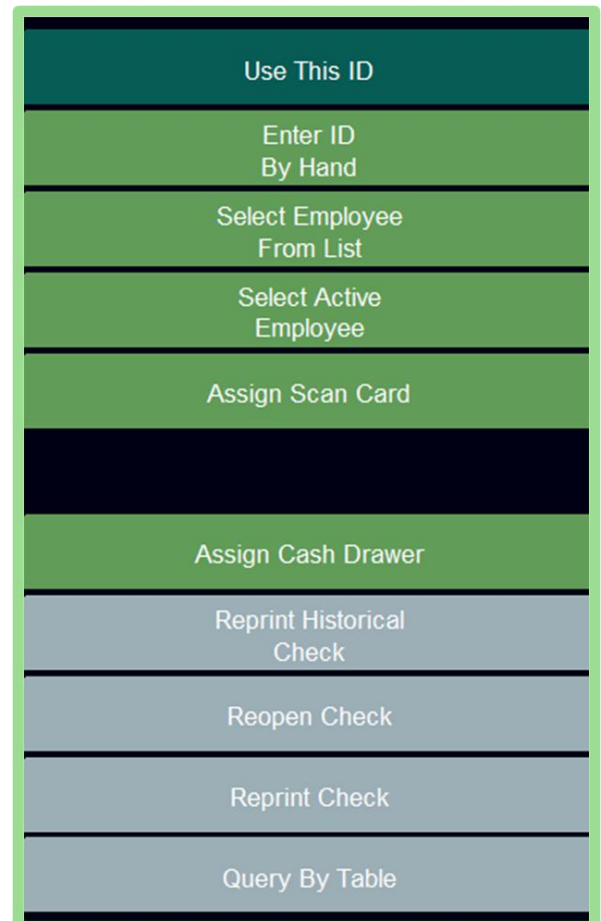
Manager Menu Key

- **Flash readings** – Current sales and metrics for the day.
- **86/un-86 items** – Removes or restores the ability to sell these items.
- **Adjust countdown** – Assigns or removes the number of units left of an item that can be sold. Once zero is reached, item is 86.
- **Change base price** – Allows managers to change the price of items.
- **Set dynamic Pricing** – Changes all items to the selected price level.
- **Arrange item screens** – Removes items from screen without 86-ing the item.
- **Loyalty functions** – Screen to manage customer loyalty info.
- **Disable online ordering** – Disables guests' ability to place online orders.
- **Set order prep time** – Sets the expected order prep time for order status operations.

Flash Readings
86 / Un-86 Items
Adjust Countdown Items
Change Base Price Items
Set Dynamic Pricing Base Price
Arrange Item Screens
Loyalty Functions
Disable Online Ordering
Set Order Prep Time 0 mins
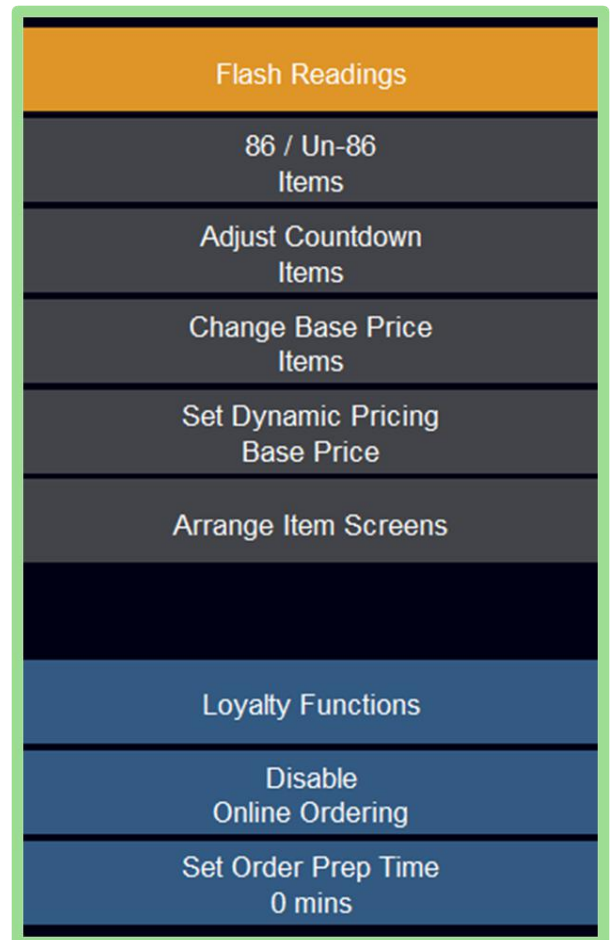
Manager Menu Key

- **Clear employee/table locks** – Removes the lock for a table that an employee has open on another terminal.
- **Control printers** – Redirects/restores print jobs from one printer to another.
- **Release print jobs** – Deletes any print tasks that haven't yet been printed.
- **Run other programs** – Runs programs configured with that system (calculator, support connection, etc.).
- **Change Date/Time** – Used to change the date and time of the terminals. This will control the time on every terminal.
- **Reload now** – Pushes through any changes made that haven't taken effect.
- **Un-Keep window on top** – Allows other windows to be displayed on top of the terminal application.
- **Terminate system** – Closes the terminal application.
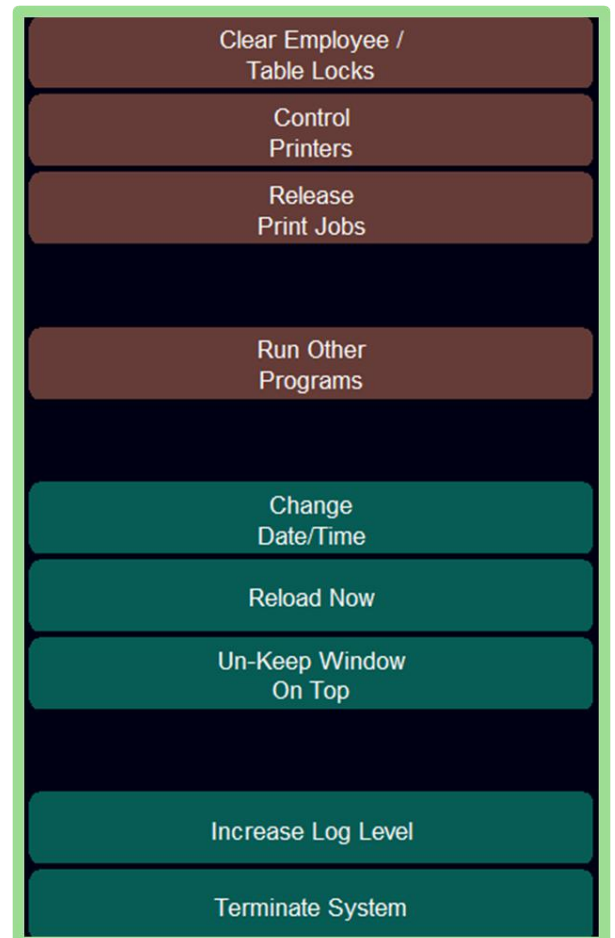
Flash Readings

The 'Flash Readings' Screen shows managers what's happened in the store for the day so far. Sales, labor, product mix can all be quickly from any FOH terminal The buttons along the bottom represent different views and filters.

After ringing and closing several practice orders, bring up the flash readings to familiarize yourself. Look through all of the screens to make sure everything is reporting correctly.

Management Console

Management Console

The management console is where managers maintain their database. Modifying menus & merchandise, adding employees, viewing reports and running End of Day. (EOD).

Your onePOS database will come to you *mostly* complete, but will require input on your part to get it ready for go-live. This section will teach you how to manage employees, merchandise, dining areas, and more.

Opening the Manager Console

Your onePOS University technician will help you install the MC on your back office computer if you have one. There will be a shortcut on the desktop, task bar, and or/start menu.

All terminals come with the MC pre-installed. To access MC from a terminal:

- Enter your manager ID or swipe your onePOS access card.
- Press the "Terminate System" button on the bottom right side of the menu.
- Launch the MC from the shortcut on the desktop, start menu, or task bar.
- If your terminal does not have a mouse and keyboard connected, you can tap the icon until it opens or hold the icon until the options menu displays itself.
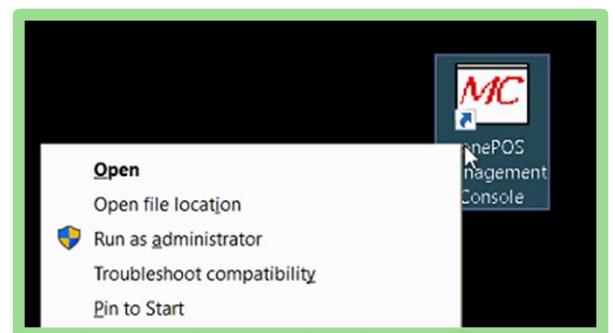
Add, Add Like, & Add Bulk

Your onePOS database will come to you completed to the level of information you've provided. In order to help our clients continue to change, build, and grow we've developed some useful functions that you'll see across the Management Console.

- **Add** – Creates a new item in the context that you're working. Totally blank, this function requires the most attention to detail as a missed check-box could become a frustrating (or even costly) experience.
- **Add Like** – Creates a copy of the item that you've chosen with a prompt to change the new items name and other pertinent data about that item. Please note, the new item will inherit **all** attributes of the original item except for the ones you've changed in the prompt.
- **Add Bulk** – Much like 'Add Like', 'Add Bulk' allows the creation of several new items that inherit the attributes of the original item.

*Keep in mind - 'Done' saves the item created or changes made whereas 'cancel' or the 'X' button will not.

We want to introduce these functions early as they will be monumental in the ease of use with onePOS.

Employees

- The top section of the drop-down deals with adding or modifying employees and their records.
- Sync Hot-Schedules synchronizes schedule data with users that subscribe to hot-schedules.
- The third section of this tab deals with adding delineations about employees. Using Pay Categories as an example, the onePOS database will likely contain categories like "Server," "Bartender," "Host" etc.. If management has the need to add another category like "Greeter" or "Overnight," this is the place to do so.
- The last section of the Employees tab deals with archiving and exporting labor data.

POS Employees Merchandise Customers

Unre

Modify Employees...
Employee Messaging...
Clock Employees In/Out...
Query Labor...

Sync Hot-Schedules...

Clock In Messages...
Pay Departments...
Pay Categories...
Commission Departments...
Commission Categories...
Shifts...
Employee Note Labels...
Employee Questions...
Hire Status...
Terminate Status...
Residency Status...
Marital Status...
Language...
Ethnicity...
Security Roles...
-Overtime Rules...

Export Labor...
Post Labor...
Un-Post Labor...

Repl
Printer Status:

Adding Employees

1. Navigate to 'Modify Employees'
2. Highlight an employee or @template that is most similar to the employee you'd like to add.
3. Click 'Add Like.' All attributes for security and pay categories will be inherited.
4. .Fill out relevant information. Required fields include: First Name, Last Name, Nick Name (This will auto-populate after you enter first and last), and Sign On ID.
5. Make sure to check for the appropriate pay rate(s) under "Pay Rates"
6. Click 'OK' to save.

Keep in mind that 'Add Like' copies an employee. You should not make a server from a cook or a manger from a bartender. Entering a pay rate in a pay category allows that employee to clock in as that role.
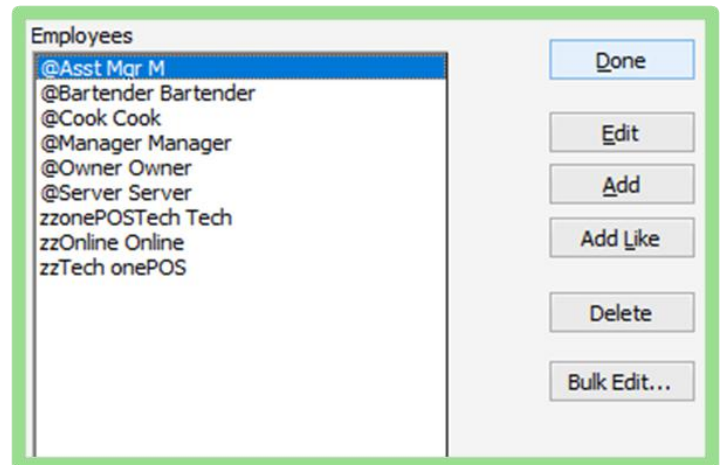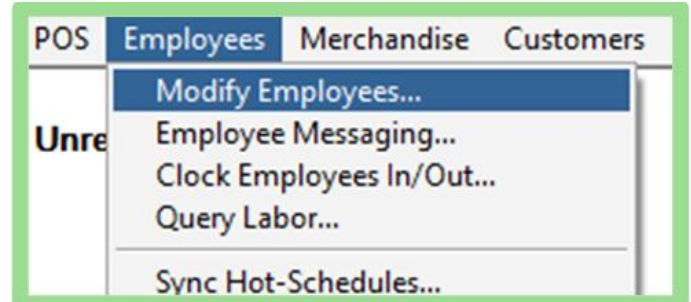
Modifying Employees

1. Navigate to 'Modify Employees'
2. Highlight the employee you'd like to modify.
3. Click 'Edit.'
4. .Change the employee information, security, and/or pay rate as needed.
5. Click 'OK' to save.

Please note, entering a date in the termination field under the 'Human Resources' tab makes the employee inactive.

Query Labor

Query labor is a function that allows managers to add, modify, or delete time clock records, sales, and claimed tips.

The time clock automatically clocks employees out after 24 hours. This is where managers would validate those records.

- To view an employee's Time Clock(s):
- Go to 'Employees' > 'Query Labor...'
- Select an employee, then click 'View'

You will see a list of time entries. You can highlight one and then click "Edit..." to modify the time entry. You can also add a time clock entry by clicking on "Time Clock..." in the 'Add Record' section.
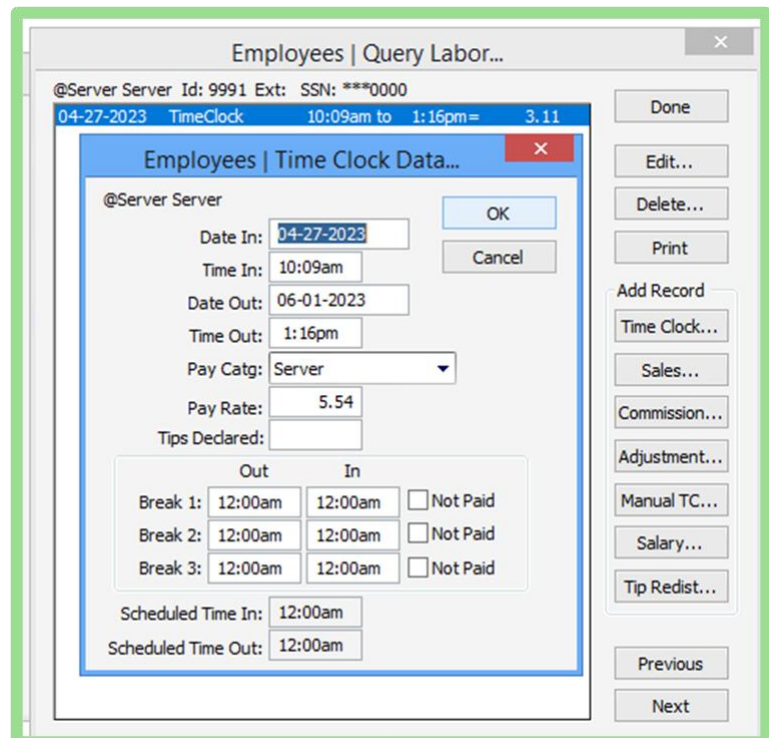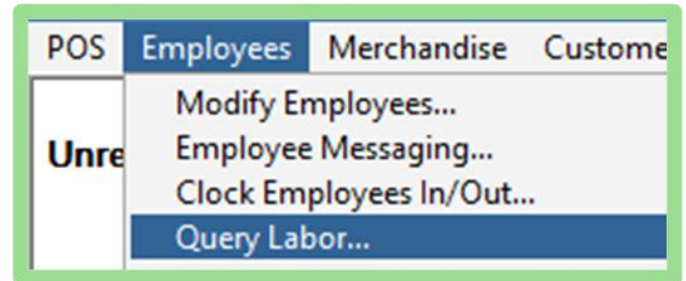
POS

- POS Transaction Query lists all transactions for a specified date.
- The second section deals with cash drawers.
- Manager activity lists all actions performed in MC.
- View Active Tables/Employees - shows open tables and clocked-in staff.
- The next group deals with EOD and closing that day's journal.
- Log out/Exit – Logs a manager out of the MC or closes the application.
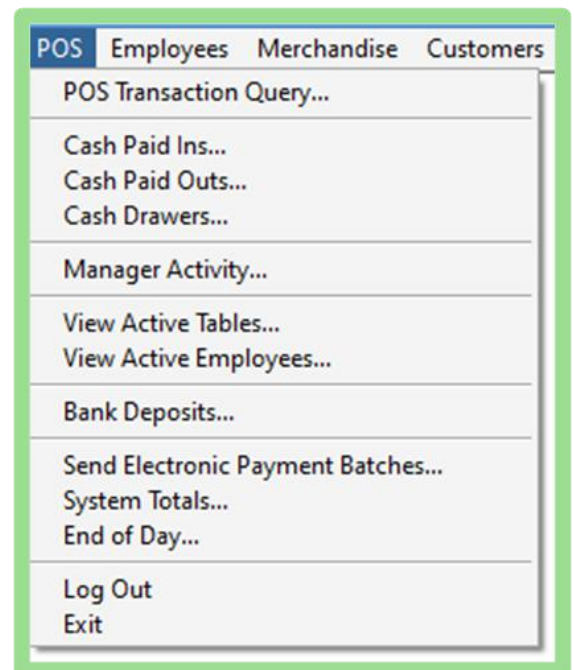
End of DAY

End of Day (EOD) is the process that:

- Ensures all tabs and tables are closed
- Ensures all FOH employees have entered their tips and completed their checkout
- Sends the credit card batch to the bank
- Balances expected vs actual revenue
- Posts the days journal and starts a new one
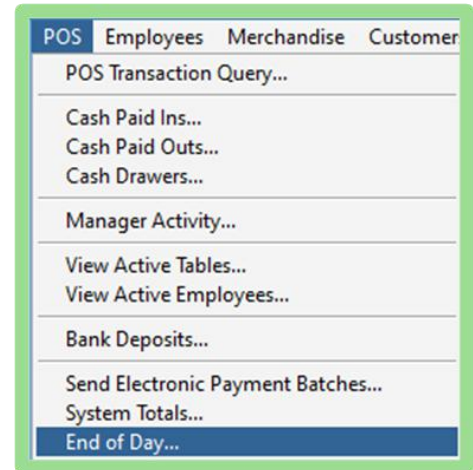
The EOD dialogue box displays all the items that need to be completed before that day's journal may be posted. It is imperative that the EOD prompt looks like the one below to have a successful EOD. The "OK" status of each step shows that that step has been completed and it is "OK" to proceed. The next page shows an example of an EOD that is not ready to post.

*If End of day is not completed at the end of business, call onePOS support before open. Journals can be adjusted by onePOS technicians. Your onePOS project lead will complete your first EOD with you. Two days together render oneMetrix cloud reporting invalid.
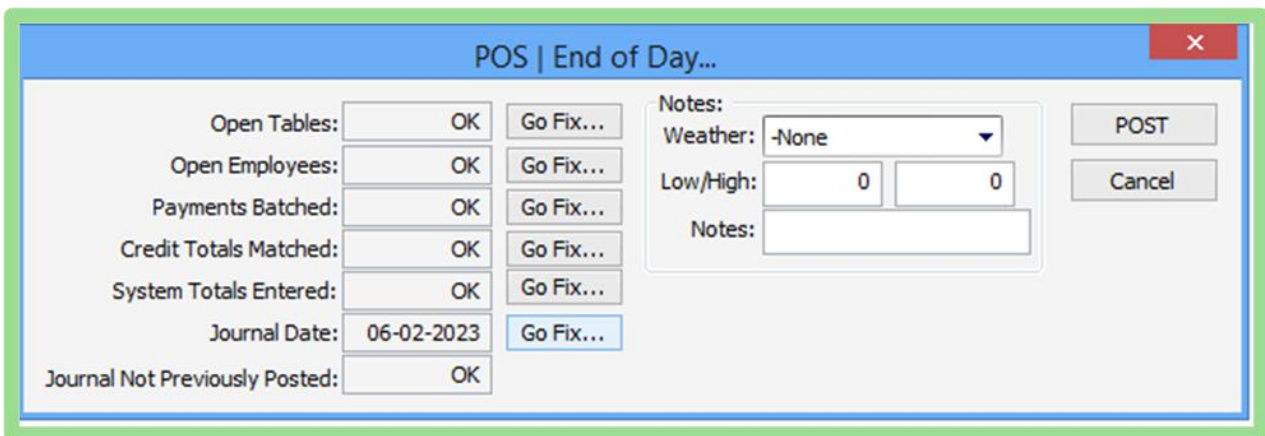
End of DAY
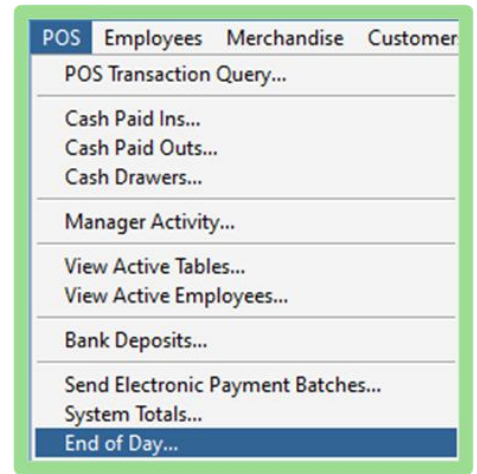
EOD is always completed from top to bottom. If at any point, a step shows anything besides "OK" (or correct date in the "Journal Date" step) then the manager should stop, select "Go Fix..." and use that dialogue box to fix the issue. The "Active Tables..." box that appears after clicking 'Go Fix' next to 'Open Tables,' shows the 10 tables that still need to pay.

The example below shows:
- There are 10 checks that are still open (have not paid)
- 1 open employee (has not run a checkout)
- Credit cards have not been batched
- Revenue numbers have not been balanced
- The journal date is in the past as designated by the "**DUP**" status which denotes that another journal has already been posted under that date.

Failure to resolve all steps to "OK" status (and correct journal date) may result in
lost or incomplete data, missing revenue, incorrect reporting, and more.

Transaction Query
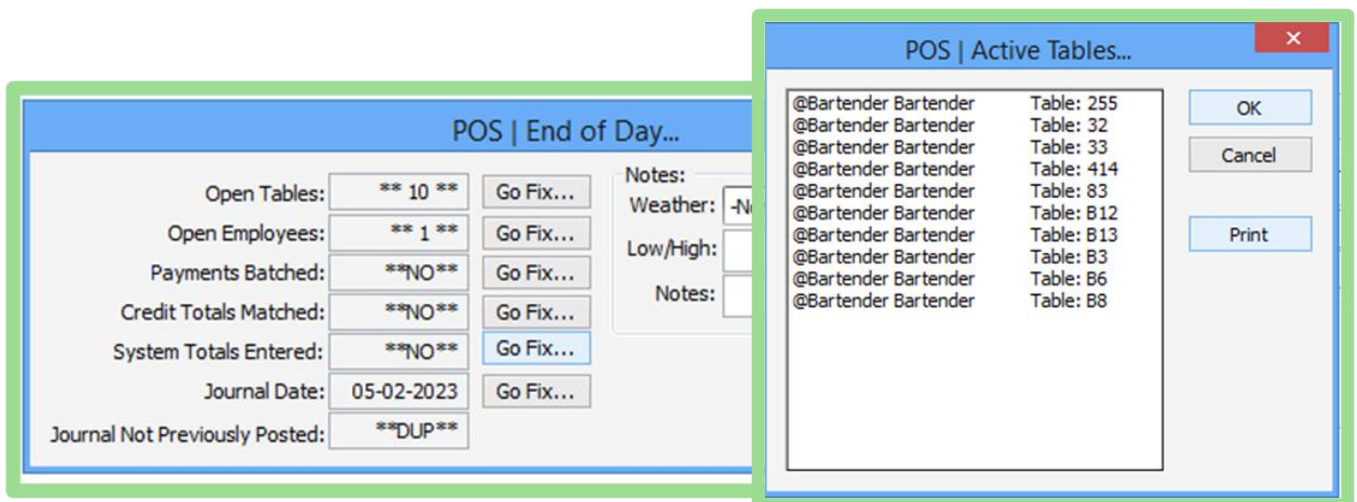
POS Employees Merchandise Customers
POS Transaction Query...

The POS Transaction Query allows management to locate transactions on specific days through a variety of filters. Highlighting a transaction and clicking 'Tix Details' will display the recorded information about that ticket.

Employee:	@Bartender Bartend ▼	Table Number:	0			Done	
Revenue Center:	-All ▼	Time From:	12:00am	To:	12:00am	Refresh	
Dining Area:	-All ▼	Amount From:	0.00	To:	0.00		
Payment Method:	-All ▼	Customer/Last4/Tix ID:				Journal Date: Current	
Reduction Type:	-All ▼						

Date/Time	Type	Employee	Ta...	Amount	Note	Tic...	
2:59pm	Ticket	@Bartende...	B13	13.08	U	3...	Print
2:59pm	Ticket	@Bartende...	B8	12.79	7	3...	Past Journal...
2:59pm	Ticket	@Bartende...	B6	13.08	Y	3...	Tix Details...
2:58pm	Ticket	@Bartende...	B3	26.16	1	3...	
2:59pm	Ticket	@Bartende...	B12	6.54	Cash	3...	
2:58pm	Ticket	@Bartende...	255	8.82	Cash	3...	
2:59pm	Ticket	@Bartende...	32	2.94	Cash	3...	
2:59pm	Ticket	@Bartende...	33	2.94	Cash	3...	
2:58pm	Ticket	@Bartende...	414	19.62	5	3...	
2:59pm	Ticket	@Bartende...	83	8.82	Cash	3...	

```
Begin     2:59pm  Tbl: B6    Gsts: 0/1 Cust: 0   Trans: 3800138      CSI: 0       OK
          Name: Y
Sale      2:59pm  Gst: 1   $  6.00  Qty: 1    Rolling Rock                        Print
Sale      2:59pm  Gst: 1   $  6.00  Qty: 1    Rolling Rock
Payment  2:44pm  Cash     $  13.08 $                                              Print To
          Crd: 0000***0000 Trx: 12  Auth:
End       Time:  2:44pm                                                           EMail
```

Reports

- The first section is operational and statistic reporting. Whether that include sales, inventory, or auditing.
- The second section includes reports for labor reporting. These will give you information on how long employees worked in a certain period.
- The third section includes reports that show a list of items set up in your database. You could get a list of all your merchandise items and their prices for example.
- Custom Reports show reports with already predefined filters.
- The last two sections allow reports to be saved or emailed.
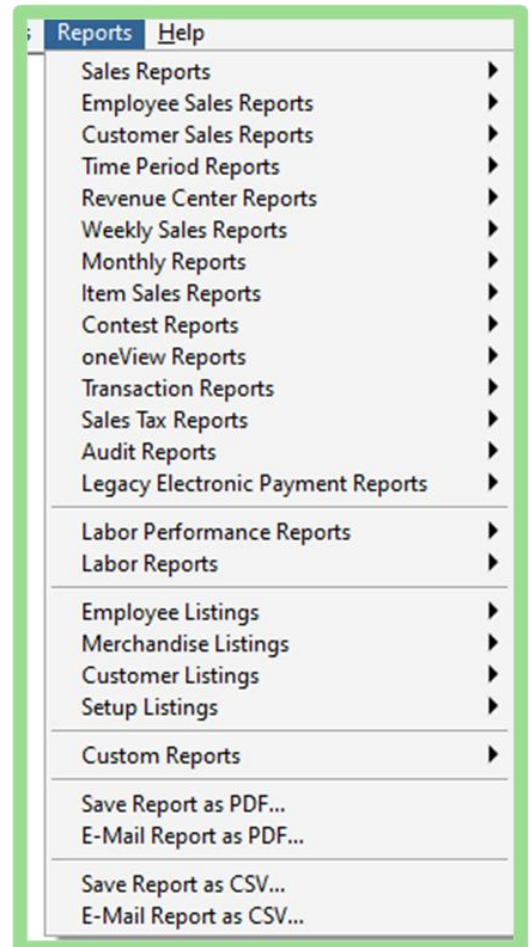
Reports	Help
Sales Reports	▶
Employee Sales Reports	▶
Customer Sales Reports	▶
Time Period Reports	▶
Revenue Center Reports	▶
Weekly Sales Reports	▶
Monthly Reports	▶
Item Sales Reports	▶
Contest Reports	▶
oneView Reports	▶
Transaction Reports	▶
Sales Tax Reports	▶
Audit Reports	▶
Legacy Electronic Payment Reports	▶
Labor Performance Reports	▶
Labor Reports	▶
Employee Listings	▶
Merchandise Listings	▶
Customer Listings	▶
Setup Listings	▶
Custom Reports	▶
Save Report as PDF...	
E-Mail Report as PDF...	
Save Report as CSV...	
E-Mail Report as CSV...	

Daily Sales Report

Date: 06-05-2023   Time Periods: All   Rev Ctrs: All

Accountability

Item	Actual
+ Total Income	105.95
+ Non Revenue Income	
+ Gratuity Income	
+ Tip Fee Income	
+ Surcharge	
+ Gift Sales	
+ House Acct Pymts	
+ Taxes Collected	8.84
+ Cash Disc Adjust	
- Cash Disc Given	
+ Petty Cash	
- Petty Cash	
= Total Accountability	114.79

Receipts

Item	Actual
+ Cash	
+ Non-Cash	
+ Gift Sales Diff	
+ House Acct Diff	
+ House Tax Comp	
+ House Grat Comp	
= Total Receipts	

Balance

Item	Actual
Total Accountability	114.79
Total Receipts	
Short	114.79

Statistics

Item	Actual
Table Sales	22.00
Tickets	10
Tables	4
Guests	4
Calc Guests	4
$ / Ticket	10.59
$ / Guest	5.50
$ / Calc Guest	5.50
$ / Table	5.50
Guests / Table	1.00
Calc Guests / Table	1.00
Min / Table	
Take Out Tickets	
Take Out Sales	
Customer Count	
CSI Count	

Income

Name	Gross(pCD)	Voids	Refnds	Net	Dscnts	Coupns	Comps	Net/Net
Food	33.95			33.95				33.95
Beer	72.00			72.00				72.00
Totals:	105.95			105.95				105.95

Non-Revenue Income

Name	Gross(pCD)	Voids	Refnds	Net	Dscnts	Coupns	Comps	Net/Net
Totals:								

Gift Card Sales

Name	Gross	Voids	Refnds	Ideal	Actual	Dscnts	Comps	Net/Net
Totals								

House Acct Payments

Name	Gross	Voids	Refnds	Ideal	Actual	Dscnts	Comps	Net/Net
Totals								

Taxes

Name	Taxable	Tx Exmpt	Tax Col
Tax	105.95		7.40
Liq Tax	72.00		1.44
Totals			8.84

Bank Deposits

Name	Base	Tip	Other	Total	Actual	Diff
Cash Total	114.79			114.79		-114.79

Non-Cash Payments

Name	Base	Tip	Total	Actual	Diff
Totals					

Warnings

Name	Count	Amount
Price Changes		
ReOpened Checks		
ReOpened Reduced		

Daily Sales Report

While there are many reports and ways to display them, the Daily Sales (DSR), Labor Details, and Product Mix are the most frequently used. The DSR is automatically set to print after completion of EOD. The DSR, as well as most reports, can be set to email and print automatically at different intervals.

When viewing reports, there are a variety of different filters and time periods that can be utilized to find the information you're looking for. Explaining all of them if beyond the scope of this course. Below is the default view for the DSR. Notice that it is set to display all data for June 5th.

The previous page shows an example DSR and the following pages will show the Product Mix and Labor Details reports. Take some time to familiarize yourself with these reports and discuss any questions with your onePOS University technician.
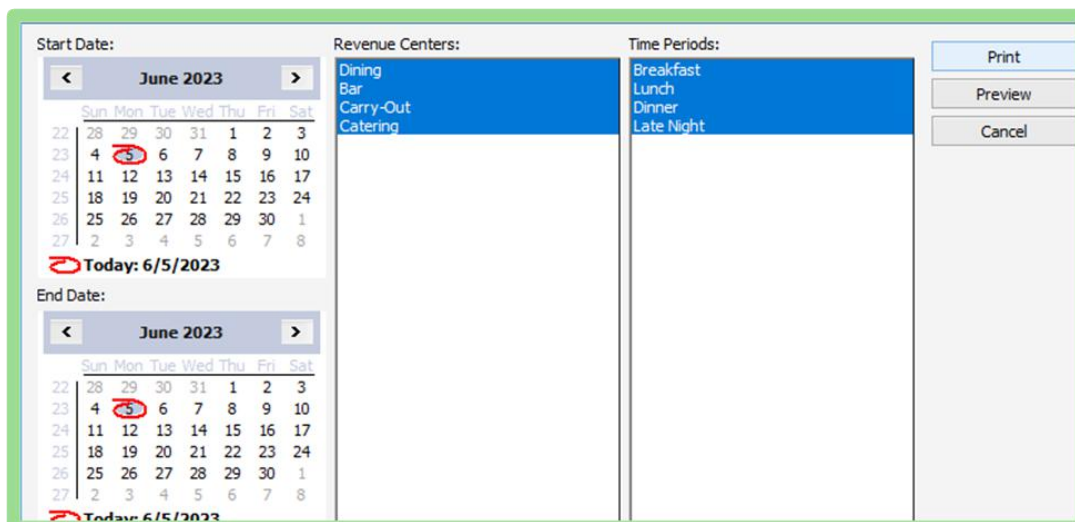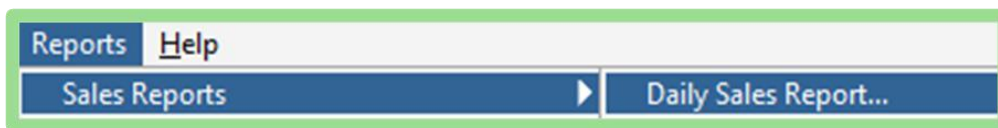
Product Mix Report

Reports	Help		
	Sales Reports	▶	Daily Sales Report...

Item Sales Reports	▶	Product Mix Report (Item Sort)...
Contest Reports	▶	Product Mix Report (Quantity Ran
oneView Reports	▶	Product Mix Report (Dollar Ranke

Items | Product Mix Item
onePOS Version: 22.4.03

onePOS Direct

Page # 1 of
5:17pm 07-10-20

Date: 07-10-2023   Time Periods: All   Rev Ctrs: All   Req Areas: All

Appetizers

Name	Itm Id	Ext Id	Net	Comp	% Grp	% Rpt	Net	Comp	Disc	% Grp	% Rpt	Q/Day	$/Day
Pick-Up Pickles	1		1		6.2	0.4	1.00			8.1	0.1	1.0	1.00
Premium Pretzles	41		15		93.7	6.0	11.25			91.8	1.4	15.0	11.25
Group Total:			16			6.4	12.25				1.6	16.0	12.25

Desserts

Name	Itm Id	Ext Id	Net	Comp	% Grp	% Rpt	Net	Comp	Disc	% Grp	% Rpt	Q/Day	$/Day
Apple Nachos	93		1		4.3	0.4	3.25			4.1	0.4	1.0	3.25
Fudge Brownie	79		13		56.5	5.2	42.25			54.3	5.6	13.0	42.25
NY Cheesecake	88		9		39.1	3.6	32.25			41.4	4.2	9.0	32.25
Group Total:			23			9.2	77.75				10.3	23.0	77.75

Drinks

Name	Itm Id	Ext Id	Net	Comp	% Grp	% Rpt	Net	Comp	Disc	% Grp	% Rpt	Q/Day	$/Day
Bottled Water	516		4		33.3	1.6	4.00			14.0	0.5	4.0	4.00
Soda Water	15		1		8.3	0.4	1.00			3.5	0.1	1.0	1.00
Sweet Tea	22		1		8.3	0.4	1.00			3.5	0.1	1.0	1.00
V-Bloody Mary	127		6		50.0	2.4	22.50			78.9	2.9	6.0	22.50
Group Total:			12			4.8	28.50				3.7	12.0	28.50

Entrees

Name	Itm Id	Ext Id	Net	Comp	% Grp	% Rpt	Net	Comp	Disc	% Grp	% Rpt	Q/Day	$/Day
T2 Hny Salmon	1357		9		100.0	3.6	40.50			100.0	5.3	9.0	40.50
Group Total:			9			3.6	40.50				5.3	9.0	40.50

Kids

Name	Itm Id	Ext Id	Net	Comp	% Grp	% Rpt	Net	Comp	Disc	% Grp	% Rpt	Q/Day	$/Day
Kids Quesa	161		10		100.0	4.0	15.00			100.0	1.9	10.0	15.00
Group Total:			10			4.0	15.00				1.9	10.0	15.00

Pizza

Name	Itm Id	Ext Id	Net	Comp	% Grp	% Rpt	Net	Comp	Disc	% Grp	% Rpt	Q/Day	$/Day
*Peppr Lovers	600		1		100.0	0.4	3.50			100.0	0.4	1.0	3.50
Group Total:			1			0.4	3.50				0.4	1.0	3.50

Labor Details Report

Reports	Help			
Sales Reports		▶	Daily Sales Report...	

Labor Reports		▶	Labor Overview Report...
Employee Listings		▶	Labor Summary Report...
Merchandise Listings		▶	Labor Summary Department Report...
Customer Listings		▶	Labor Summary Category Report...
Setup Listings		▶	Labor Details Report...

Date: 07-02-2023 to 07-10-2023

FOH
Barback
Jeffner

Date	Pay Catg	In	Out	Hours	OT Hrs	Rate	Reg Pay	TTL Pay	Tips Dec
07-02-2023	Porter	9:16pm	4:02am	6.76		7.98	53.94	53.94	100.00
07-08-2023	Porter	9:20pm	3:49am	6.48		7.98	51.71	51.71	50.00
07-09-2023	Porter	9:14pm	4:03am	6.81		7.98	54.34	54.34	100.00

	Hours	OT Hrs	TTL Hrs	Reg Pay	OT Pay	TTL Pay
Totals	20.05		20.05	159.99		159.99

Sales:	Tips:	% Tp:	CR TTL:	CR Sl:	CR Tp:	CR %	Auto Grat
	250.00						

Malik S

Date	Pay Catg	In	Out	Hours	OT Hrs	Rate	Reg Pay	TTL Pay	Tips Dec
07-02-2023	Barback	5:08pm	3:44am	10.60		7.98	84.59	84.59	200.00
07-07-2023	Barback	8:58pm	4:07am	7.15		7.98	57.06	57.06	100.00
07-08-2023	Barback	3:33pm	4:31am	12.96		7.98	103.42	103.42	250.00

	Hours	OT Hrs	TTL Hrs	Reg Pay	OT Pay	TTL Pay
Totals	30.71		30.71	245.07		245.07

Sales:	Tips:	% Tp:	CR TTL:	CR Sl:	CR Tp:	CR %	Auto Grat
	550.00						

Steven

Date	Pay Catg	In	Out	Hours	OT Hrs	Rate	Reg Pay	TTL Pay	Tips Dec
07-02-2023	Barback	5:04pm	4:02am	10.96		6.98	76.50	76.50	100.00
07-03-2023	Barback	9:45pm	12:32pm	14.78		6.98	103.16	103.16	50.00
07-07-2023	Barback	9:03pm	4:12am	7.15		6.98	49.91	49.91	100.00
07-08-2023	Barback	5:20pm	11:04pm	5.73		6.98	40.00	40.00	50.00
07-08-2023	Barback	11:45pm	4:32am	4.78		6.98	33.36	33.36	250.00

	Hours	OT Hrs	TTL Hrs	Reg Pay	OT Pay	TTL Pay
Totals	43.40		43.40	302.93		302.93

Sales:	Tips:	% Tp:	CR TTL:	CR Sl:	CR Tp:	CR %	Auto Grat
	550.00						

Bartender
Aleany

Date	Pay Catg	In	Out	Hours	OT Hrs	Rate	Reg Pay	TTL Pay	Tips Dec
07-02-2023	Bartender	4:56pm	3:34am	10.63		7.98	84.83	84.83	300.00
07-07-2023	Bartender	5:25pm	4:12am	10.78		7.98	86.02	86.02	100.00
07-08-2023	Bartender	9:59pm	4:32am	6.55		7.98	52.27	52.27	250.00

	Hours	OT Hrs	TTL Hrs	Reg Pay	OT Pay	TTL Pay
Totals	27.96		27.96	223.12		223.12

Sales:	Tips:	% Tp:	CR TTL:	CR Sl:	CR Tp:	CR %	Auto Grat
4675.23	650.00	13.90	4061.73	3219.12	862.42	26.79	

Homework #2

Homework assignments will familiarize you with the system, as well as provide an opportunity to consider the needs of your operation. These assignments are vital to your success. Notes, insights, questions, and requests that come from these assignments should be discussed with your onePOS University technician.

1. Add all employees into the Management Console using the 'Add Like' function.
   a. Keep in mind that employees need to be added from another employee or @template that most resembles their role(s). For example, a manager that is also a bartender should be "add-liked" from a manager. Then the bar pay rate should be added. This way the manager retains all security settings.
2. Test all sign on ID's on the FOH terminal.
3. If staff is available to start logging in with their numbers and exploring the system, have them do so. Have staff practice clocking in, ringing and closing checks, running their checkout, clocking out, and entering tips (all of this data will be removed before go-live). If staff is not available yet, do this with an @template.
4. Use the 'Query Labor' function to modify clock records, sales, and tips claimed.
5. Run a practice EOD.

Merchandise

- The top section of the drop-down deals with adding or modifying merchandise.
- The second section of this tab deals with adding delineations about merchandise. Using "Item Types" as an example, the onePOS database will likely contain types like "Appetizer," "Entrée," "Salad" etc.. If management has the need to add another category like "Hors D'oeuvres" or "Brunch," this is the place to do so.
- The next section of the merchandise tab deals with how and where merchandise prints or displays at the respective prep station.
- Change Item Wizard cannot be used without onePOS supervision.
- Sync with Chowly pushes the updated menu that location is using for third-party delivery services.

Merchandise	Customers	Setup	U
Modify Merchandise...			
Contests...			
Set Dynamic Pricing...			
Sort Merchandise Screens...			
Un-86 Items...			
Sales Departments...			
Sales Categories...			
Price Groups...			
Item Types...			
Color Groups...			
Price Levels...			
Screen Groups...			
Menus...			
Courses...			
Printer Routings...			
Printer Types...			
Printer Routing Schemes...			
Change Item Wizard...			
Sync with Chowly...			
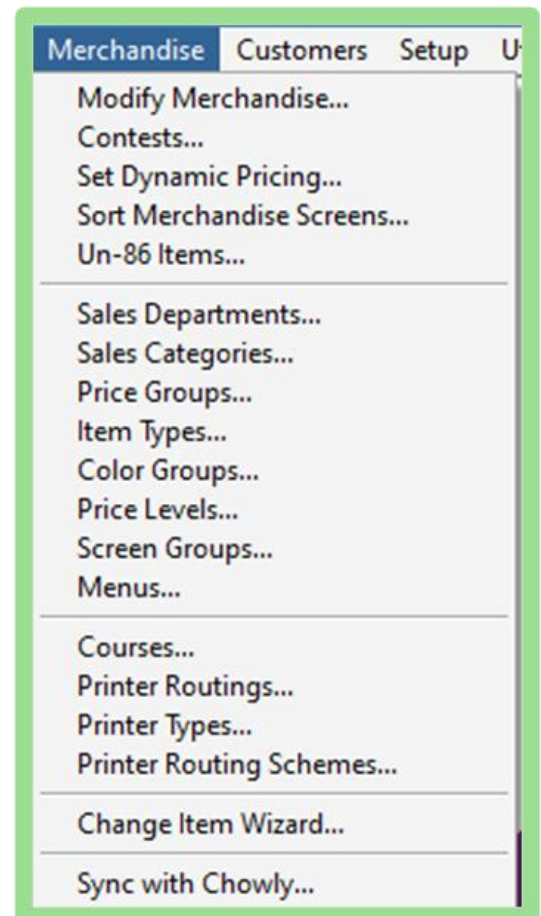
Menus

The menus built into your onePOS software are the digital layout of the offerings you provide your guests. Just like a physical menu, the menus built into your database are divided into sections that we call screen groups. Appetizers, entrees, specialty cocktails and the like are placed for easy navigation and time-saving efficiency.

Points of interest:

Name – The title of that menu, e.g. - Breakfast, Dinner, Happy Hour

Initial Default – The first screen displayed once a tab is started

Default – The screen that displays when you open that tab again

Days & Time – When that menu is active

Main Menu – Allows you to title that row of screen groups

Screen Groups – The screens that hold merchandise items
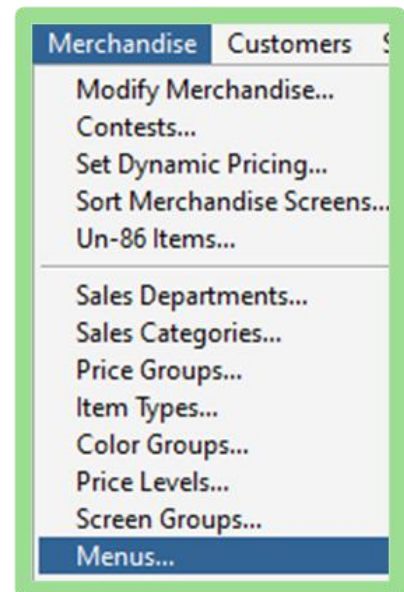
Menus

This is an example of how the setup in Management Console reflects in the FOH terminal.
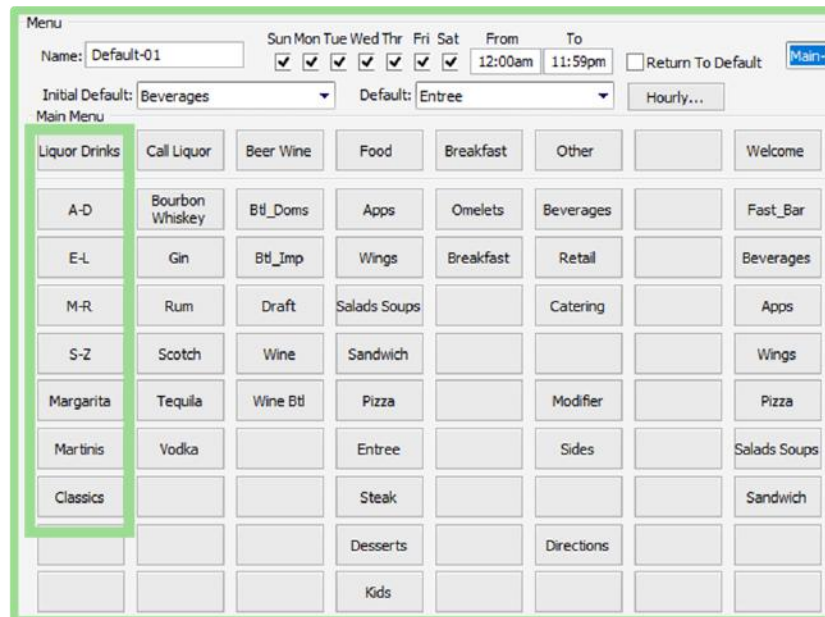
Screen Groups

Screen groups are the subdivisions of a menu that hold merchandise items. These screens help us separate appetizers from entrees, the same as a paper menu. They also function as modifier links. For example, an entrée may come with two sides, by linking a "side" screen group to an entrée, staff now have the option to pick their sides from that screen group once they've ordered the appetizer.
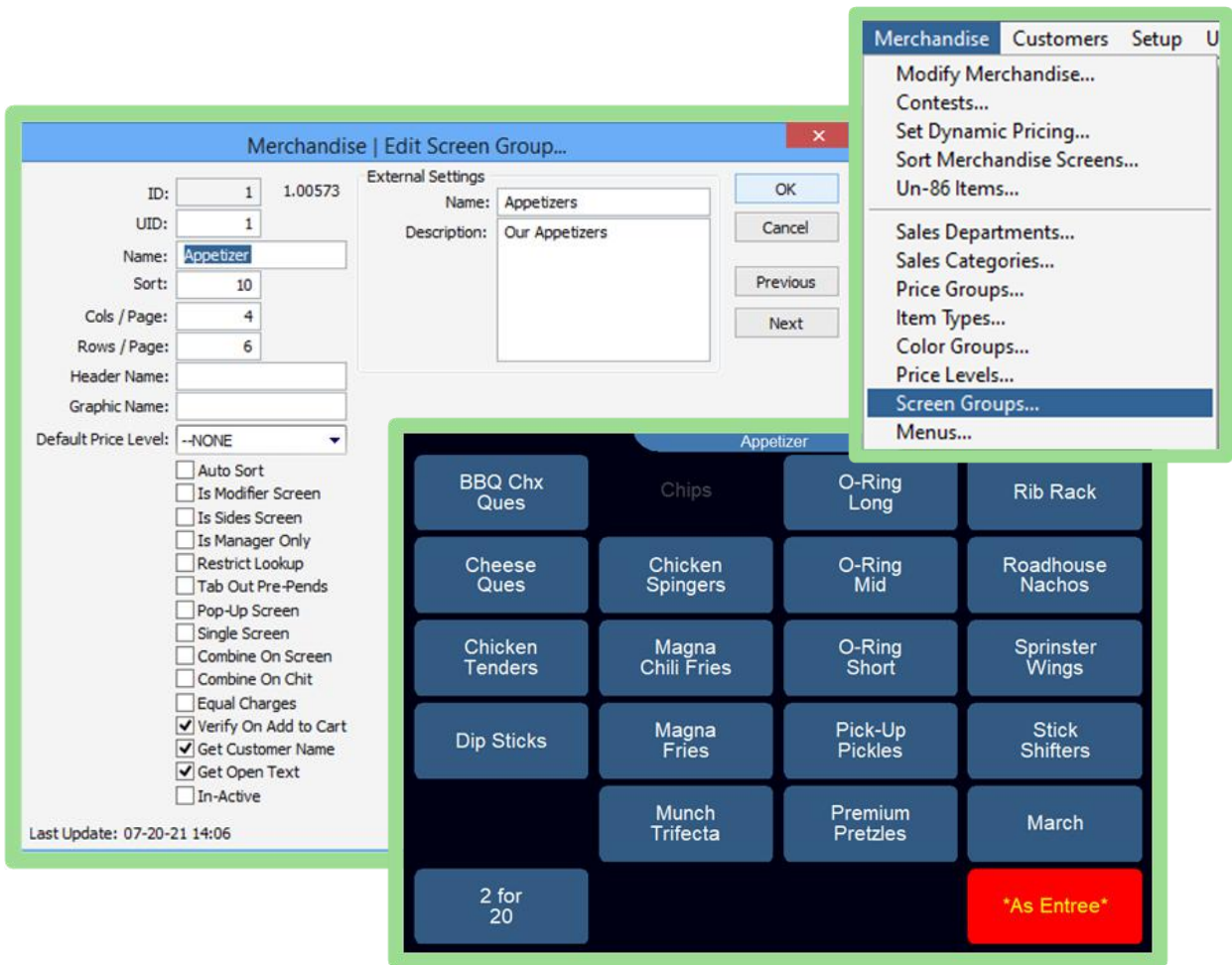
Screen Groups

- **Sort** – A way of keeping types of screen groups together in the "Modify merchandise" list. Screen groups will be ordered first by sort number, and then alphabetically.
- **Columns/Rows** per page – Determines how many spots are available per page in a screen group. This example shows 4x6, giving 24 spaces per page in this screen group.
- **Auto sort** – Allows items with the "99" screen position to be automatically organized alphabetically.
- **Is Modifier/Sides screen** – a designation to tell the system about the items in this screen (better denoted in links).
- **Tab out pre-pends** – Offsets pre-pend modifiers to the left of the page, so they don't get lost in the group.
- **Pop-up screen** – makes a screen a pop-up prompt instead of navigating to a separate screen.
- **Combine on screen/chit** – Condenses merchandise items on the screen/chit instead of displaying one item per line.
- **In-active** – Disables the screen group.

Merchandise | Edit S

ID:	1 1.00573
UID:	1
Name:	Appetizer
Sort:	10
Cols / Page:	4
Rows / Page:	6
Header Name:	
Graphic Name:	
Default Price Level:	--NONE

External S

Desc

- [ ] Auto Sort
- [ ] Is Modifier Screen
- [ ] Is Sides Screen
- [ ] Is Manager Only
- [ ] Restrict Lookup
- [ ] Tab Out Pre-Pends
- [ ] Pop-Up Screen
- [ ] Single Screen
- [ ] Combine On Screen
- [ ] Combine On Chit
- [ ] Equal Charges
- [x] Verify On Add to Cart
- [x] Get Customer Name
- [x] Get Open Text
- [ ] In-Active

Last Update: 07-20-21 14:06

Modify Merchandise
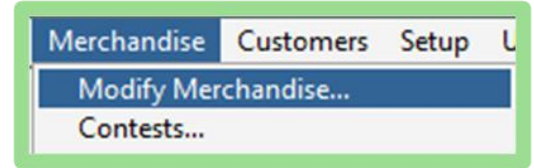
Merchandise is the product that you sell. Sandwiches, cocktails, t-shirts, gift cards, pool games, you name it. In onePOS terms, merchandise not only consists of whole products, but also any other item that can be added on, linked to, taken from, or otherwise modifies that product. Consider this order as an example:

The burger, each topping, fries, temperature, and even the pre-pend "extra" that denotes the customer wants more onions are all merchandise items.

All merchandise items are created and organized inside of a screen group. Merchandise items can appear on multiple screen groups. They can also behave differently on each screen.
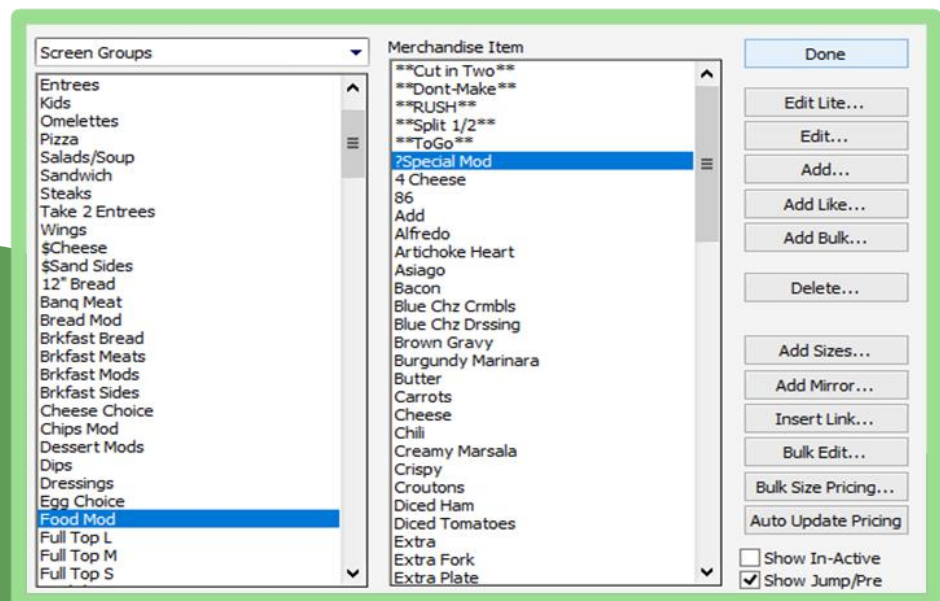
Modify Merchandise

The following pages explain the attributes and variables associated with every merchandise item.

Edit – Allows for the modification of all attributes of the highlighted item.

Edit Lite – Allows for the modification of the most frequently changed attributes of the highlighted item.

Bulk Edit – Starts at the highlighted item and allows for the modification of up to two attributes for the entire screen group.

General

When modifying merchandise, there are eight tabs you can use to change attributes for an item. Because merchandise items created using the "add like" function inherit all characteristics of the original item, managers will typically spend little time in these tabs. The general tab contains the basic characteristics of an item. Please note these points of interest:

General:
- **Name** – The name of the item
- **Order Name** – What prints on the chit, useful if name is too long
- **In-Active**– Disables the item and stops it displaying in the FOH terminal
- **Print On Receipt** – Prints an item on the guest check; applies to most items
- **86** – Denotes the item as being temporarily unavailable. Can also be accomplished from the manager menu.
- **Sales Catg** – The sales category the item reports to.
- **Print Route** – Where the item prints.

Pricing

The pricing tab is where all possible prices for an item will be defined. Different prices can be utilized depending on the day of the week, time of day, or the screen group that item is ordered from. For example, draft beer might cost less during happy hour or food ordered online might need to cost more.

The base price is the normal price customers will be charged, less taxes. For items that will have similar pricing schemes: it is wise to define the pricing, days, and time then "add like" or "add bulk" from the initial item.

*The PL check boxes are not toggles to enable the inputs made for that line. They apply premade price levels like the "Happy Hour" price level defined below.

Taxing

Taxes should be discussed before you receive your database and should be confirmed with your training technician. Highlighted taxes apply to the merchandise item.

*It is the owner and management team's responsibility to be familiar with applicable taxes and laws for their location. Taxes should be confirmed and tested before go-live. onePOS and i3Verticals do not accept responsibility or liability for uncollected, mis-collected, misreported, or any taxes otherwise incorrectly accounted for.
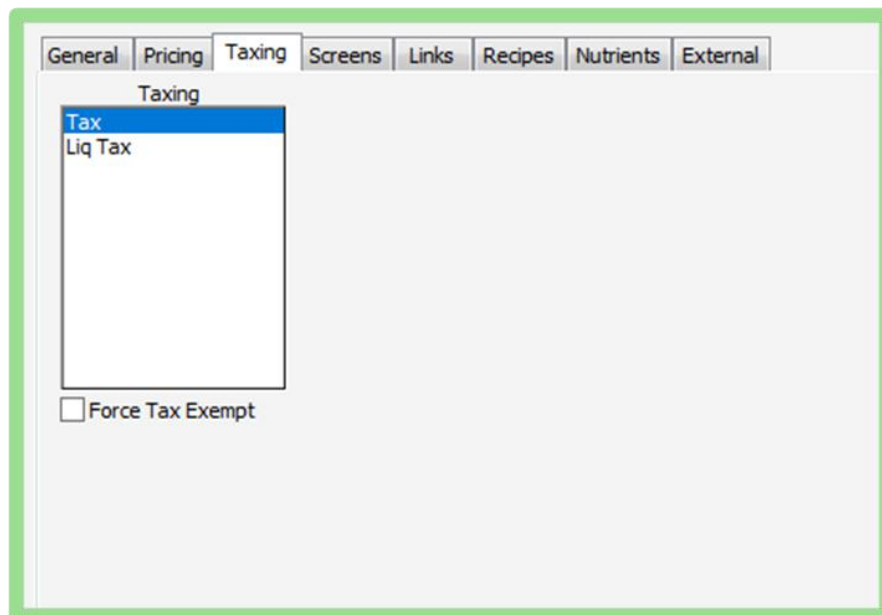
Links

The links tab is where we define the steps staff need to go through to completely order an item. The steps that apply to this item will need to be defined here for all the screens it appears on.

This example shows a steak and shrimp entrée. The first link shows that once the entrée is selected, the next step is to tell the kitchen the desired temperature. The step after asks if the customer had any special request for the steak. The check boxes are characteristics for the link and the auto select option applies a selection or action to that link automatically.

The "Food Mod" link in this example has the "Modif" and "Mult" boxes checked denoting that it's a modifier for the entrée and multiple selections for that link can be made. For efficiency, it's been auto-selected to be skipped so the only time staff will need to touch it is when special requests have been made.'

Also note this example has repeated links with the "EXT" prefix. This entrée displays on two screens and uses different links for each screen. Links and prices are defined in their respective tabs, then applied to each screen via the advanced button on the screens tab.

Links Key

- **Chain Links** – The screens that sides or modifiers being attached to the main item reside. *Order is important.
- **Modif** – Denotes the link as a modifier.
- **Side** – Denotes the link as a side.
- **Force** – Does not let staff progress until a selection for that link is made.
- **Keep** – Keeps the link available to use after the item has been sent. Useful for items like all-you-can-eat that will require a refill after the first order has been sent.
- **Mult** – Allows for multiple selections from the same screen group.
- **Sngl** – Causes this link to be rung in one at a time even if the parent item has a quantity greater than one. Think ordering ten $.50 wings, typically one wouldn't also need ten dipping sauces.
- **A86** – Displays "86" next to an auto-selected modifier on a chit when it is changed.
- **n/c** – No charge for the link
- **b/c** – Charges the difference between the auto-selected modifier and the one it is changed to.

Steak Shrimp

Tabs: General | Pricing | Taxing | Screens | **Links** | Recipes | Nutrients | External

Chain Links	Modif	Side	Force	Keep	Mult	Sngl	A86	n/c	b/c	p/c	Ignr	PAuto	PHdr	MCol	Dups	tbd	tbd	Auto Select	Min	Max	Step				
Link 1: Temps	✔		✔																0	1	1	X	I		D
Link 2: Steak Mod	✔																		0	1	1	X	I	C	D
Link 3: Food Mod	✔				✔													Skip	0	1	1	X	I	C	D
Link 4: Sides		✔					✔		✔									Cin Apples	0	1	1	X	I	C	D
Link 5: Sides		✔			✔													Skip	0	1	1	X	I	C	D
Link 6: EXT_Temps			✔																1	1	1	X	I	C	D
Link 7: EXT_Steak Mod																			1	1	1	X	I	C	D
Link 8: EXT_Sides								✔										Cin Apples	1	1	1	X	I	C	D
Link 9: -NONE																			0	1	1	X	I	C	D
Link 10: -NONE																			0	1	1	X	I	C	D

Links Key

- **Ignr** – Ignores links attached to that modifier link.
- **PAuto** – Prints the auto-selected modifier or side
- **Auto Select** – Selects the most common choice from the linked screen group. In this example, cinnamon apples comes with the steak, so it is auto-selected, but can be changed.
- **Min, Max, Step** – The minimum and maximum number of choices that must be made for the link, and how many constitute a choice. Let's say 20 wings come with up to 4 sauces. The min would be 1 (all 20 get the same sauce), we established the max is 4, and the step would be 5. Meaning if someone chooses all four sauces, customers will get one sauce per five wings.
- **C** – Copies the link and inserts it below
- **D** – The days of the week the link is applicable

Steak Shrimp

| General | Pricing | Taxing | Screens | Links | Recipes | Nutrients | External |

Chain Links	Side Modif	Keep Force	Sngl Mult	A86	n/c b/c	p/c Ignr	PAuto PHdr	MCol tbd	Dups tbd	Auto Select	Min	Max	Step				
Link 1: Temps	✔	☐ ✔	☐	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐		0	1	1	X	I		D
Link 2: Steak Mod	✔	☐ ☐	☐	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐		0	1	1	X	I	C	D
Link 3: Food Mod	✔	☐ ☐	☐ ✔	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	Skip	0	1	1	X	I	C	D
Link 4: Sides	☐	✔ ☐	☐	☐	✔ ☐	✔ ☐	☐ ☐	☐ ☐	☐ ☐	Cin Apples	0	1	1	X	I	C	D
Link 5: Sides	☐	✔ ☐	☐ ✔	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	Skip	0	1	1	X	I	C	D
Link 6: EXT_Temps	☐	☐ ✔	☐	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐		1	1	1	X	I	C	D
Link 7: EXT_Steak Mod	☐	☐ ☐	☐	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐		1	1	1	X	I	C	D
Link 8: EXT_Sides	☐	☐ ☐	☐	☐	☐ ☐	☐ ✔	☐ ☐	☐ ☐	☐ ☐	Cin Apples	1	1	1	X	I	C	D
Link 9: -NONE	☐	☐ ☐	☐	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐		0	1	1	X	I	C	D
Link 10: -NONE	☐	☐ ☐	☐	☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐		0	1	1	X	I	C	D

Screens

The screens tab shows all the current screen groups that an item appears in. This is where you control how an item behaves based on which screen it is ordered from.

Points of interest:
- **Screen On** – The screen groups the item appears in.
- **Loc** – Shows in what position the item sits on that screen. Screens are organized in columns and rows as shown previously on the screen group page. This example shows the item sitting in the first column, third row placement on both.
- **Disp** – Shows a visual grid that allows placement instead of the Loc box. Also shows where other items sit on the screen.
- **BtnSz** – The size of the button that will be pressed to ring the item.
- **TxtSz** – The text size inside the button that displays the name of the item.
- **Color** – The color of the button. Useful to delineate items like red vs. white wine.
- **Advanced** – Popup window that shows all available prices and links for the item on that page. A checked box means that a price or link is allowed on that page. In this example the advanced button will show that on the appetizer screen, only the first set of links are checked. On the "EXT" screen, only the "EXT" links are checked.
- **X, I** – X removes the line and shifts the others up, I inserts a line and pushes the others down.

Adding Merchandise

When making new merchandise items, onePOS recommends using the "Add Like" and "Add Bulk" features in Management Console since new items will inherit the attributes of the originals item.

The main thing to remember is to add from the most similar items.
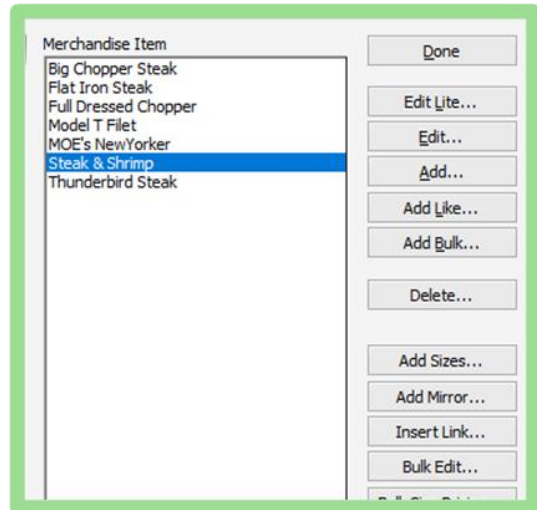
Add Like – Creates a copy of an item with a prompt that allows changes to the most usually changed attributes.

Add Bulk – Creates multiple copies at the same time. Great for adding new offerings, or variances of an item.
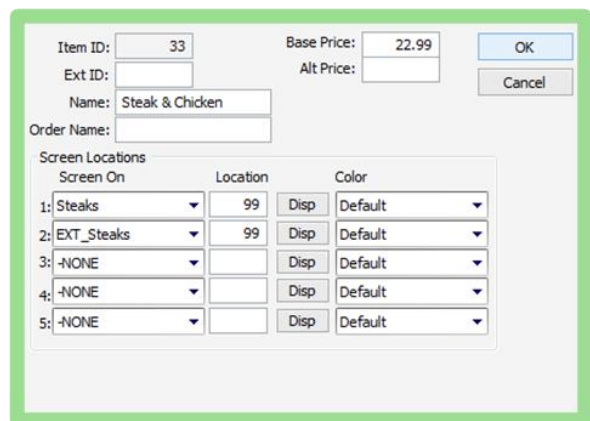
Add mirror – Adds all the items from one screen group into another, with or without creating new items. This is usually used for creating online or third-party menus like the "EXT" screens we've discussed earlier.
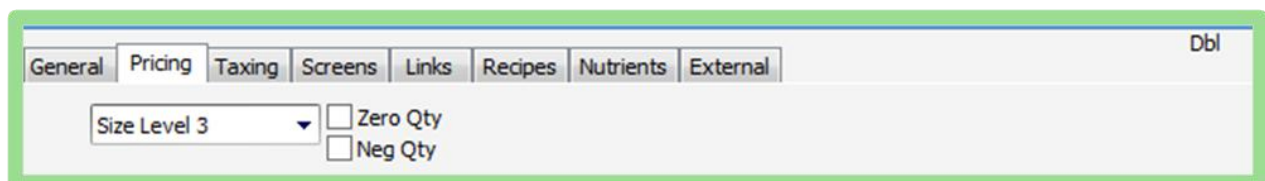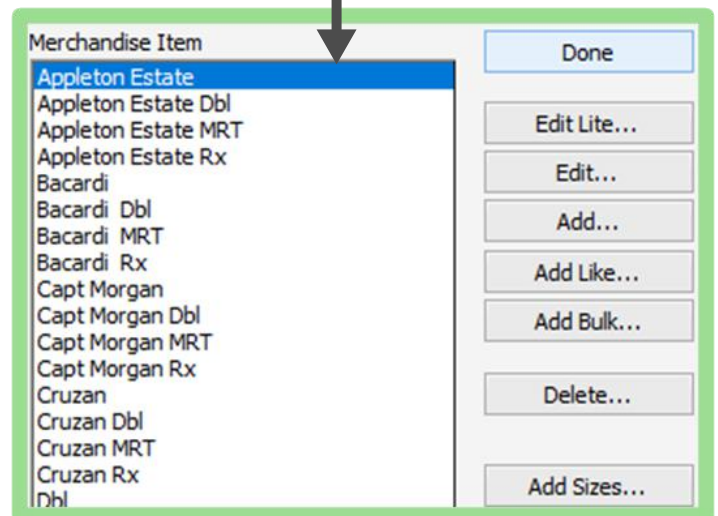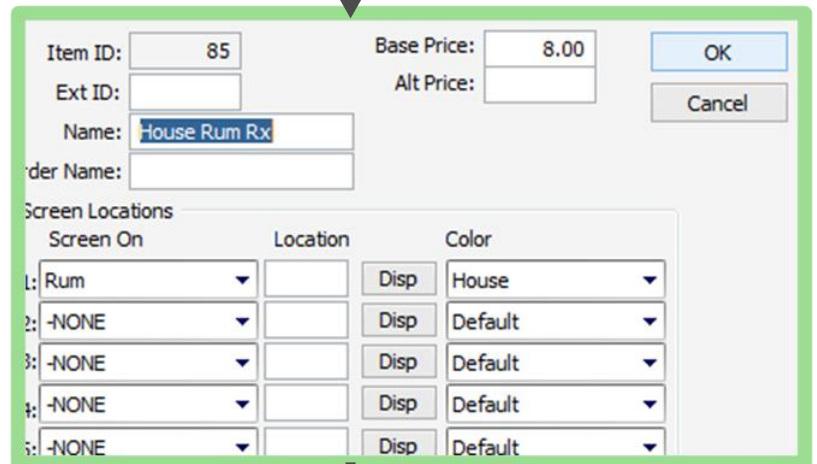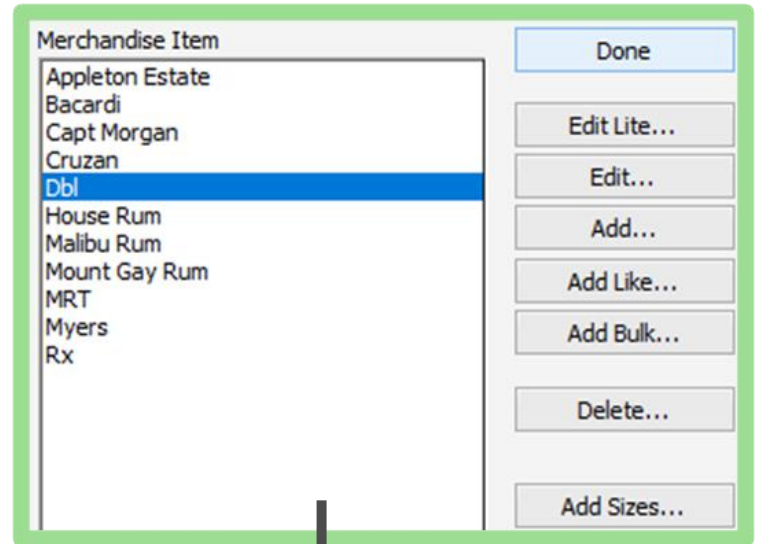
Size Levels

This example shows a Rum screen group with all the merchandise items being "singles" as well as the pre-pends "Rx," "Mrt," and "Dbl." If you're building an alcohol menu after go-live, these prepends may need to be added and defined as size levels under the pricing tab. This example shows the "Dbl" prepend being the largest of three sizes, so it has been defined as size level 3. Rx and Mrt are defined as size levels 1 & 2 respectively.

Once the size levels are defined, the 'Add Sizes...' button will step the manager through adding the different sizes, their names, and their prices. Sizes that are created like this offer the cleanest-looking screen group in the FOH terminal. The Rx, Mrt, and Dbl sized items do not have screen positions, only the singles. By pressing the prepend button first, then the rum, the desired product is rung in. This is the preferred method as any drink this rum is linked to will allow staff to change the rum or amount as an upcharge.

Size Levels

This is a demonstration of the previous page. By touching the yellow prepends on the left first, then the blue rum merchandise button, the desired drink is rung in. This works as a standalone screen or as a link.
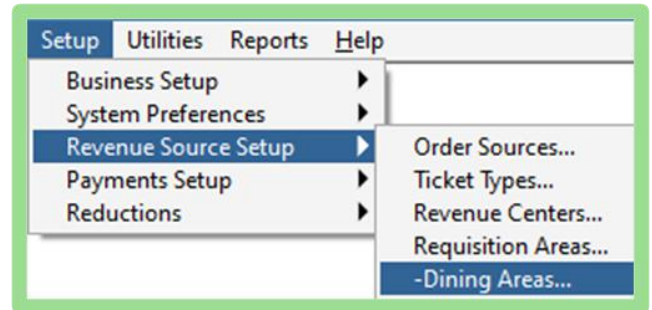
Setup

Most of this tab will be reserved for onePOS tech use or managers with experience in these areas.

- Business Setup deals with items like taxes, gratuities, and rules.
- System preferences deals with how the terminal hardware and software behave.
- The last three items will be discussed in detail in the following pages.
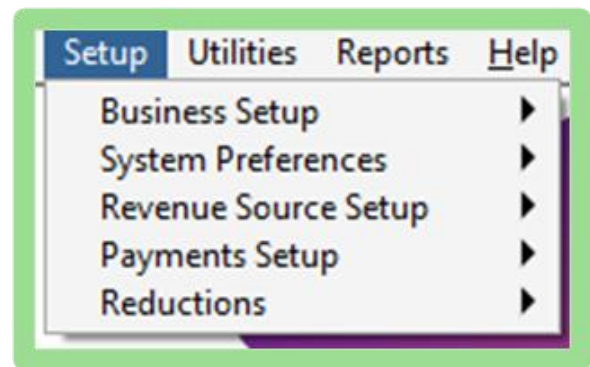
Dining Areas

Dining areas represent a location's physical dining rooms.; Porches, patios, lounges and the like. Dining areas can also act as spaces to serve off-site customers like to-go, delivery, or catering. The Dining Areas menu does not deal with specific tables, more so what happens once a table has been started.

Much like the Modify Merchandise menu, dining areas can be added, modified, and inactivated from "Setup> Revenue Source Setup> Dining Areas". Again, like Modify Merchandise, each tab represents a set of functions that can be applied to modify a dining area's behavior.

There are a plethora of options and attributes from the name of the area and colors of the tables, all the way down to which discounts and payments can be utilized. onePOS recommends that Add Like be used, when possible, to ensure continuity across dining areas.

Dining areas should be discussed during the kickoff call so they can be built into your database before training. Adjustments can be made at any time to better suit the site.
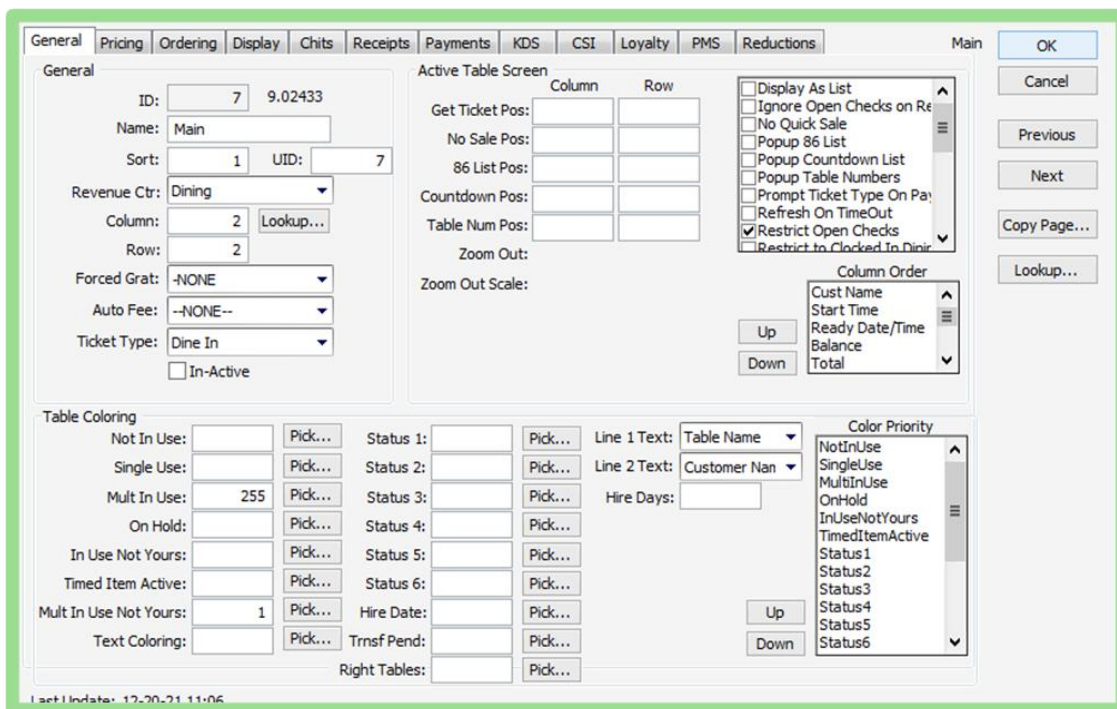
Dining Areas Tabs

General
Name, type, table color, and basic functions of the area. The lookup button on the right is very useful when searching for specific features or functions.

Pricing
The pricing tab displays all price levels, taxes, and gratuities currently defined in the system. Items that are checked or highlighted are allowed in that dining area. Price levels are defined in MC under merchandise. Taxes and gratuities are defined under Setup.

Ordering
Ordering has to do with the way that customer orders are inputted and sent from the FOH terminal. The options in this tab can get quite complicated, it is not recommended to change settings without a certain level of familiarity with the system.

Display
Deals with the what is displayed during order entry. The most changed features in this tab are the order entry timeout and the menus that are highlighted to display.

Chits
Changes how orders flow from that dining area and how they print once they're received.

Receipts
Attributes associated with what is printed on the guest check.

Payments
Just like with menus, discounts, and price levels, payments that are added after go-live must be allowed in the appropriate dining areas. Online orders are a great example of a dining area that is only allowed to use a specific payment.

KDS, CSI, & Loyalty
These tabs should be left alone without the supervision of a onePOS technician.

Reductions
Again, any coupons, discounts, comps, or refunds that have been defined in the system must be allowed or disallowed in the applicable dining areas.

Revenue Centers & Ticket Types

Revenue centers are used for reporting where revenue is being generated. The default centers are listed to the right. Revenue centers are purely for reporting and do not have any bearing on the function of the software. To make a dining area report to a revenue center, it must be assigned in Dining Areas.

Ticket types refer to the type of order that was placed and how the product should be provided to the customer. Ticket types can have attributes assigned to them so that chits automatically print a certain way. For example, any order placed in the "To-Go" dining area will automatically print the "**To-Go**" modifier after each item. Again, ticket types are applied in Dining Areas.
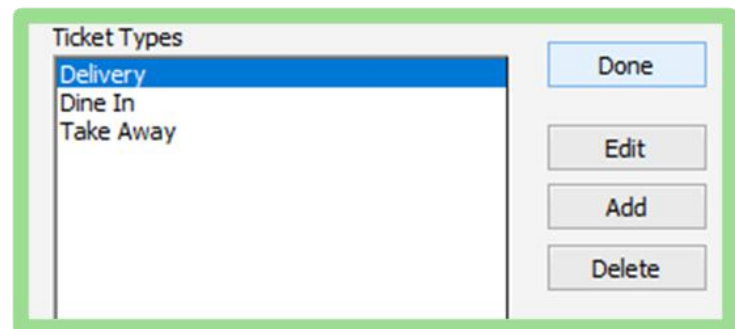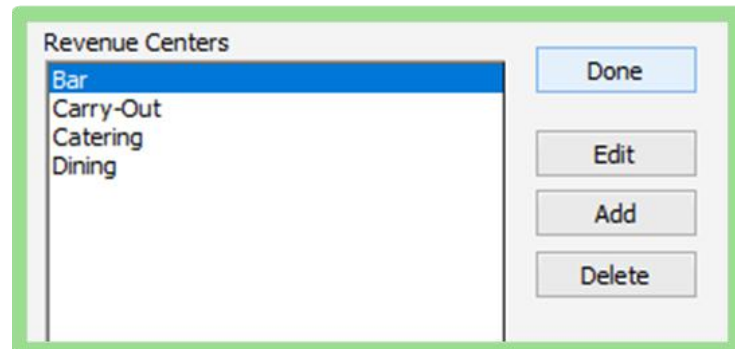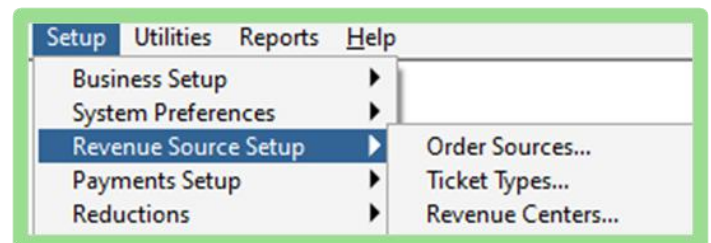
Dining Objects
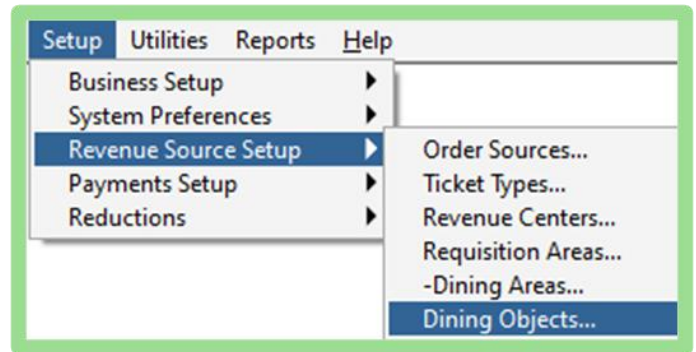
Dining objects are the tables, bar stools, and/or tabs inside a physical dining area. We feel that giving staff and managers a visual representation of their location adds to the intuitiveness of onePOS. Dining objects are managed and manipulated in the 'Dining objects' section of the setup tab.
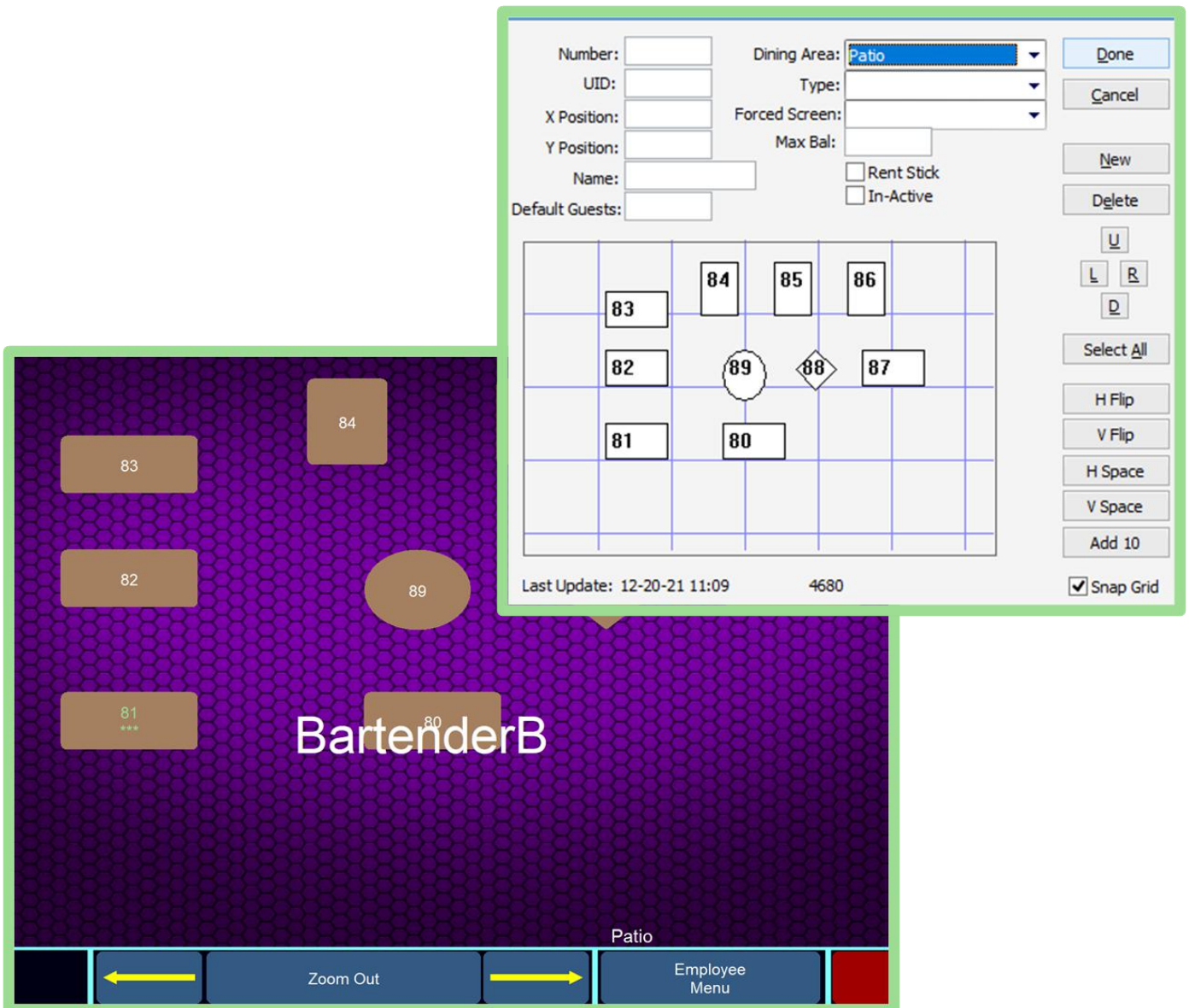
New Menu Exercise

Exercises will familiarize you with the system, as well as provide an opportunity to consider the needs of your operation. These exercises will only contribute to your success. Notes, insights, questions, and requests that come from these exercises should be discussed with your onePOS University technician.

1. Create a new screen group
   a. This can be a temporary screen for this exercise or one you need for your site. Use the information from other screen groups as a guide.
2. Create a new menu
   a. This can be a temporary menu or one you would like to develop for your site. Use the other menus as a guide.
   b. Be sure to place your new screen group in this menu as well as adding others.
3. Create new items inside your new screen group
   a. Make at least one using the "add" function, 1 from the "add-like" function, and 5 from the "add-bulk" function.
4. Navigate to "Setup > Revenue Source Setup > Dining Areas" and allow this menu in a dining area under the "Display" tab.
5. Check your work in the FOH Terminal You should be able to user your new menu in the appropriate dining area, select all of your screens, and order your new merchandise.

Common Hardware

The onePOS system is compatible with a multitude of hardware configurations, much of which are beyond the scope of this course. However, there are certain basics that apply to most, if not all, sites.

While reviewing this section, keep in mind that it's not uncommon for hardware needs to change throughout the life of a site. Considering the constant changes in technology, payment systems, laws and regulations, onePOS strives to offer the hardware solutions to best fit your needs. Don't hesitate to talk to your sales person or technicians about your options for optimizing your business.

Terminals

While it may be a bit confusing, we refer to the touch-screen computer that runs the onePOS application as a terminal. A full explanation of this machine is outside of the scope of this course. However, there are still some points of interest that will help managers in troubleshooting situations.

1. **Power socket** – For the power supply to the machine.

2. **USB Ports** – For peripherals like credit card readers.

3. **Serial COM Ports** – These are where local receipt printers are plugged.

4. **Ethernet Port** – Necessary for a wired connection into the site's network.

5. **Magnetic Stripe Reader** – Only reads onePOS access and gift cards.

Terminal 1

All onePOS hardware is named or numbered inside the software to delineate hardware in the system setup. The first terminal is typically the server or what we consider the "brain" of the operation. All data, images, and settings are stored on terminal 1.

Any other terminal in the system can go down without causing major issues, but terminal 1 must be connected to the network to continue business operations. All other terminals must be able to communicate with terminal 1 in order to function.

Internet service can go down without interrupting business operations, but a break in the network or incorrect network settings can cause a loss of communication between terminals. Such an interruption will cause this message to display:
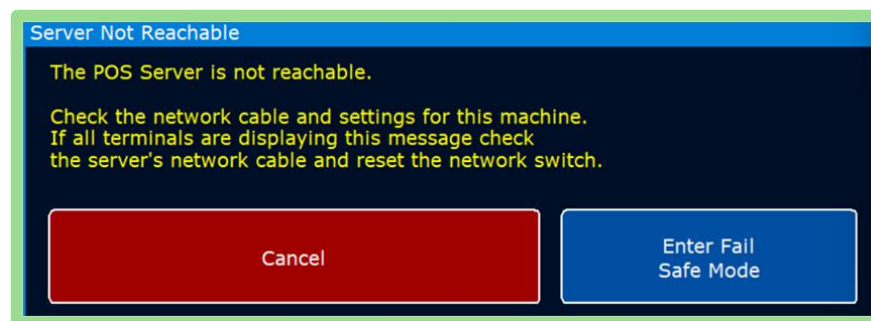
Terminal numbers are located along the bottom of the screen after the serial number.
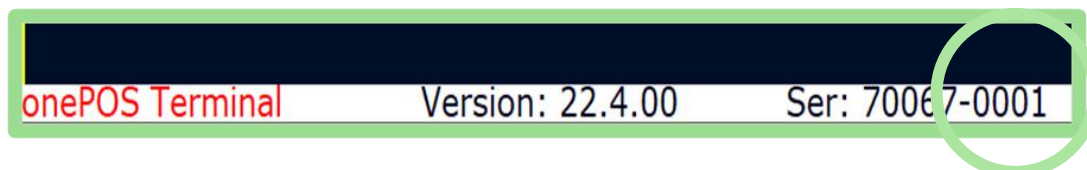
Printers

Thermal Receipt Printers

Thermal printers use heat to activate the chemical in the thermal paper. Thermal printers are typically used as receipt printers but can be acceptable in any environment that does not experience heat, water, or oil as the paper is sensitive and the order could become difficult to read. onePOS standard operating procedure is a direct serial connection into the terminals at com port 1.

*All onePOS cash drawers plug into these printers. If the printer is down, the cash drawer will also be down.

Impact Kitchen Printers

Impact printers use a red and black ink ribbon to print orders onto chits. These printers are the best option for kitchens and bars because:

- The two-color ribbon can highlight important modifiers
- The ink absorbs into the paper and is not as sensitive to heat, oil, or water.

While these can be connected directly to the terminals, a network connection tends to be much more versatile.

Peripherals

Credit Card Readers

Credit card readers are typically connected to the terminals via USB. However, they can be ethernet as well, depending on the device and needs of the customer.

Cash Drawers

We offer multiple sizes of cash drawers for different needs. All cash drawers connect to the local printer at the terminal.
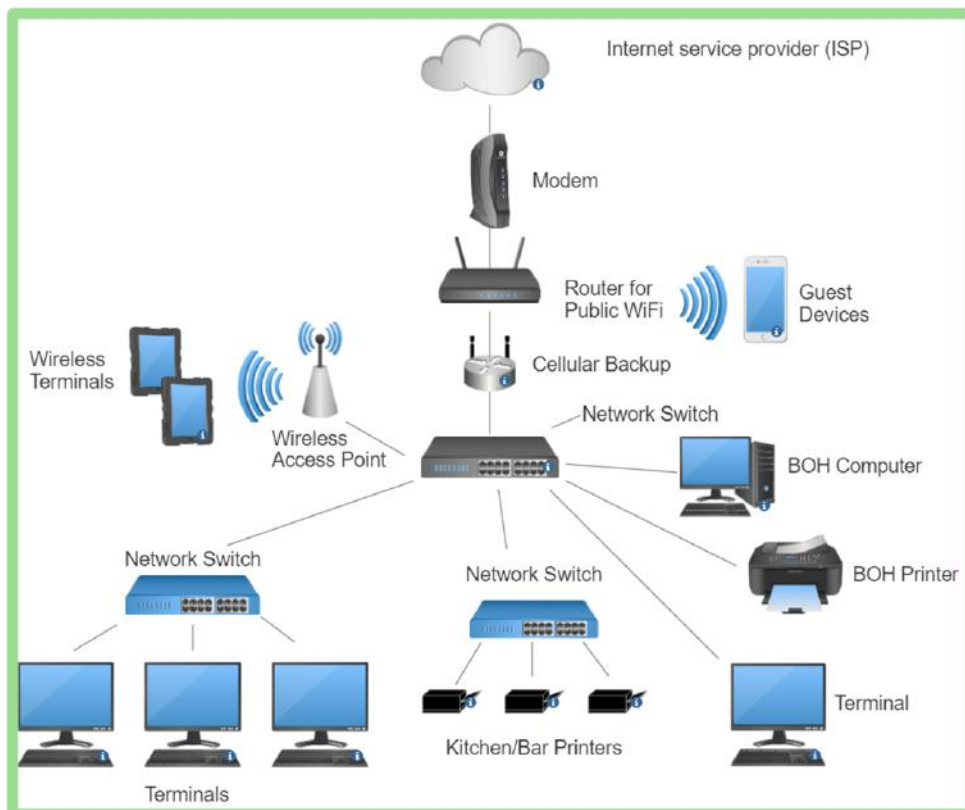
Network

Network setups vary widely among locations and networking is beyond the scope of this course. However, a basic understanding of your network will help managers in troubleshooting connectivity issues, as well as provide faster resolutions in support situations. Below is an example of a typical network setup.

*It is highly recommended that the entire management team familiarize themselves with their network equipment. In troubleshooting situations, it will bring you to resolution much more quickly.

Newton's Law of Service Industry: "If it can fail, it will fail when we're slammed."
Dinner rush is not the time to figure out which box in the office is your modem.

Transafe & oneMetrix

Transsafe

Transsafe (portal.transsafe.com) is the gateway that handles all credit card transactions and sends them to your merchant processor.

You can view and validate all credit card transactions and batches from this portal. It is a great way to match your books with your bank account. Additionally, you can process refunds and modify tip amounts from this portal in the case of a mishap with an order or a batch.

Please note: Transsafe is not a onePOS product. While we can support you in the use, managers will be responsible for actions like issuing refunds or entering in missed tips. Changes made in Transsafe will NOT reflect on the POS system.
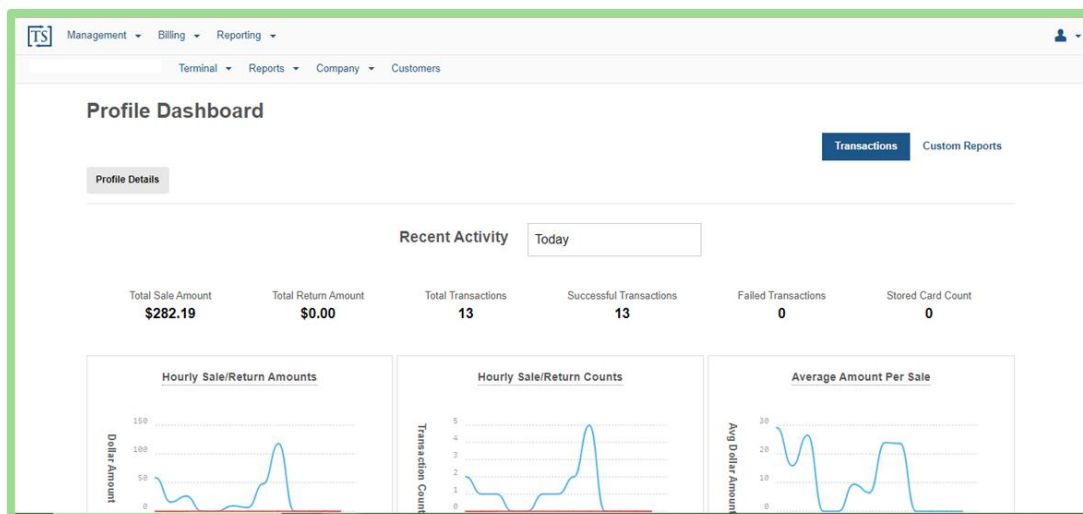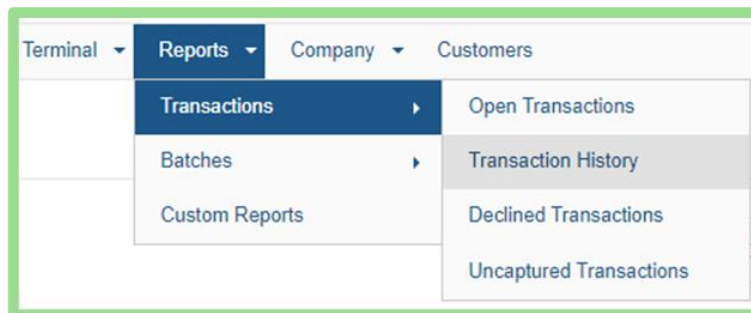
Transactions

You can view your past transactions by going to 'Transaction History.'

Specific transactions can be more easily found by using the Filter box at the top. You can search by transaction amount, last 4 digits of the card number, customer name, or any other field found in the list.

You can refund, modify, or start a new transaction by clicking on the 3-line menu next to a transaction.
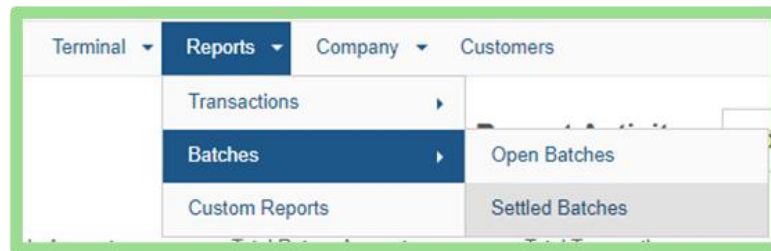
Batch History

Transafe can show you the history of your settled batches. The date listed only shows the date that the batch was ran and NOT necessarily the date that the money was deposited into your bank account.

You can click on the 3-line menu to view all transactions in a specific batch.

	Batch #	Date/Time	Route ID	Total Trans #	Total Trans $	Total Return #	Total Return $
≡	725	7/11/2023 12:01	0	87	1539.00	0	0.00
≡	724	7/10/2023 12:45	0	55	986.18	1	2.43
≡	723	7/9/2023 11:21	0	72	1703.45	0	0.00
≡	722	7/8/2023 12:30	0	104	2157.90	0	0.00
≡	721	7/7/2023 11:54	0	105	2026.45	0	0.00
≡	720	7/6/2023 11:57	0	90	1770.60	0	0.00

oneMetrix

oneMetrix is our online portal for managing your business. It's been streamlined, but operates almost identically to Manager Console. oneMetrix is designed to give owners and managers the functions and reporting they need remotely from any modern web browser.

oneMetrix is the platform on which our online ordering, scheduling, cloud features, and mobile apps are based.

Install & Go-Live

Install

Install will be handled by either a onePOS technician or a third-party installation company. While it is not always strictly necessary, onePOS recommends the site be closed for the install process.

Installations vary from site to site, but there are certain requirements that apply to all sites. If the following criteria are not met, the install will be postponed:

- The site's network must be verified by onePOS personnel or an authorized representative. It must also be labeled and isolated from other traffic, most-importantly guest traffic.
- Appropriate placement/shelving, power, and network access must already be in place and properly functioning.
- Point-of-contact for the project must be available during the install, if not on-site.
- For new sites: Construction that may be harmful to equipment must be complete.
- All paperwork, training, and other project requirements must be satisfied.

Go-Live

Your go-live date should be set in the kickoff call at the start of the project. We understand that for many sites this date can be tentative. It is, however, important to set the goal to keep the project on track. Before go-live, onePOS recommends that a site's lead or training staff have exposure to the topics covered in this course from the manager. Time to use the FOH terminal will help managers bring the rest of their staff up to speed for a smooth go-live.

Depending on the expectations for the project, a onePOS technician will either be on-site to assist through the first day(s) or provide remote support for clients already familiar with this process.

Please note, management and point-of-contact participation in the entire process up to this point will determine the success of the go-live. Go-live is the time to deal with unforeseen or minor issues. It is not appropriate to implement an entirely new menu or pricing structure that management did not provide beforehand.

Go-Live Field Guide

It's important to remember, for all intents and purposes, go-live is just business as usual. There will inevitably be things that come up that were not considered before, don't panic. We've put together a list of small reminders that may help guide you through your first days. In no time at all managers won't even have to think about this.

- Don't forget to stock up on printer paper and ribbons.
- Nothing needs to be done to "start" the system. Employees simply clock-in and start working.
- All employees must clock into their respective pay categories and dining areas.
- If bartenders already have an auto-bank configured, it will factor into checkout.
- Always keep your manager's card handy.
- Ensure all FOH staff have completed their checkout, clock out, and claim tips before they leave.
- Remember to complete EOD from top to bottom, making sure all boxes say "OK" and the date is correct for the date of business.

Thank You!

Thank you very much for your participation in this course. Please take any notes or questions to your one-on-one meetings with your onePOS University technician. We also encourage you to continue to reference this guide for new managers and continued training.

We also have several other resources for help, knowledge, and training:

onePOS A.I. Help - https://www.onepos.com/support-portal/
Knowledge Base - https://onepos.zohodesk.com/portal/en/kb/onepos/end-use
Support phone number - (407) 641-0121
Support email - support@onepos.com