Dine-In Module

For POS Pizza © 2008 Summit Computer Networks, Inc.

User documentation for Summit's Dine-In Module version 5.5

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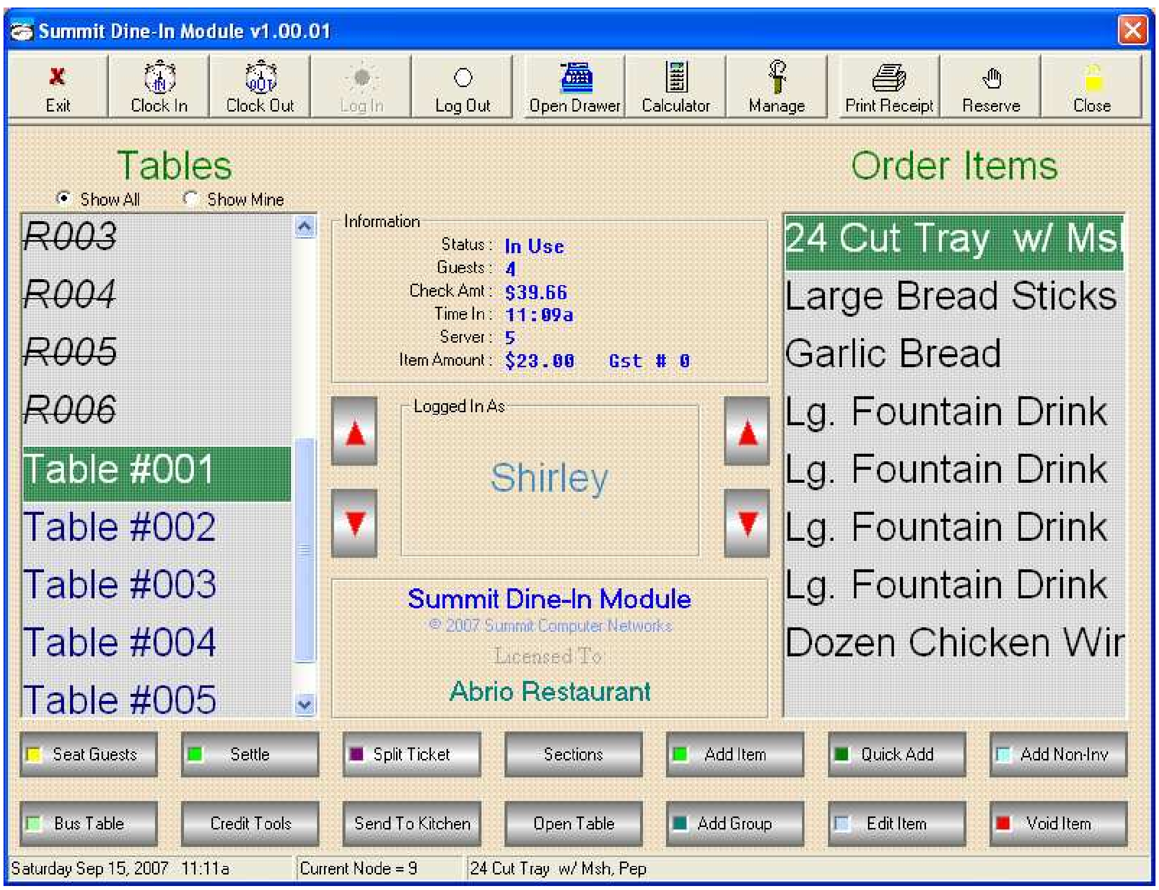
Introduction

The Dine-In Module is designed for wait staff to manage tables and sections and handles the order process for this type of environment in a more streamlined way than the Main POS Module.

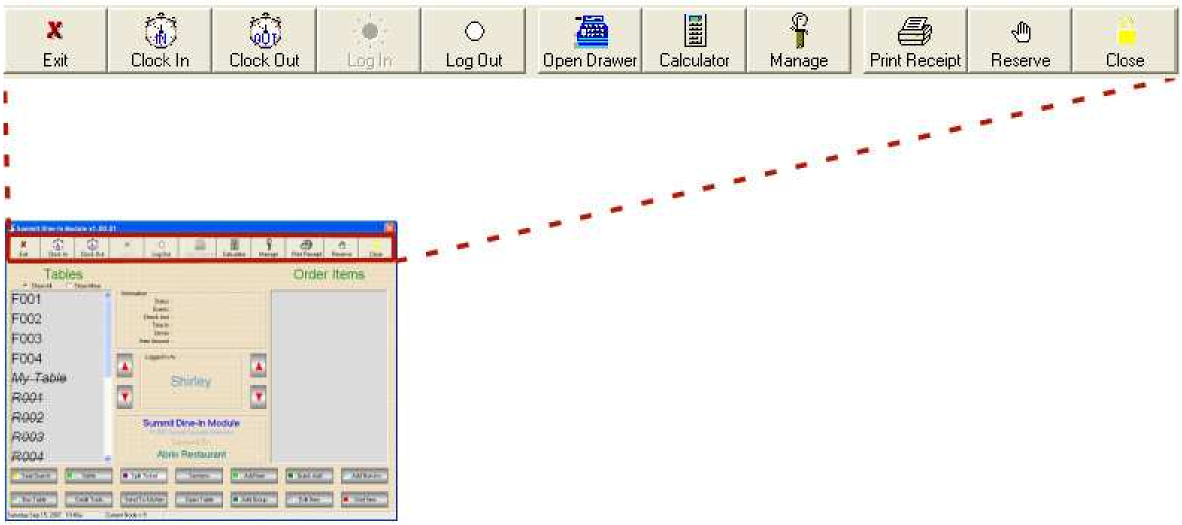
Operating the Dine-In Module

Stations running the Dine-In Module will more than likely be dedicated to this sole purpose. The Dine-In Module keeps all of the information and functions on a single screen which is pictured below.



This screen is easy to use because it is broken up into 5 primary sections. The first section being the top toolbar section, the next being the left-side table list section, followed by the center info section, the right-side order items section and the bottom functions section. The dine-in module has been highly optimized for use with a touch screen. The lists are using very large fonts, they also have page up and page down arrow buttons next to them and there is very little on-screen keyboard based screens so most everything can be added and changed with a touch of a button.

The Toolbar Section (top):



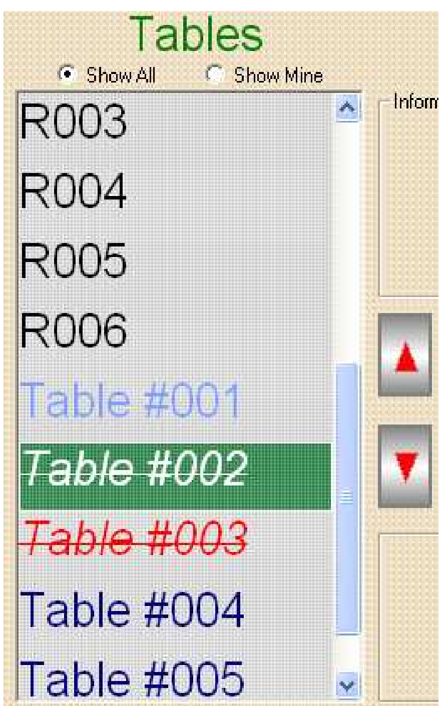
On the top toolbar you have some of your basic functions available, most of which you have already seen in the main POS side of things. We will cover each button starting at the left-hand side working toward the right and explain their specific functionality.

- **Exit –** This is for exiting the program completely and returning to the Windows desktop. The server must have the "Can Exit POS Module" right selected in the employee editor in order for this button to be active.
- **Clock In –** This will bring up the standard clock in screen so that any employee may clock in using the built-in time clock. It does not matter who is logged in or if anyone is logged in for this function. Any employee can use this button regardless of who is using the station.
- **Clock Out –** This button will clock an employee out of the built-in time clock and can be used by anyone just like the clock in button.
- **Log In –** This button is used to log a server into the Dine-In module. Before an employee can do this they must have the "Is Wait Staff (Server)" option checked in the employee editor.
- **Log Out –** This button will log the employee who is currently logged into this station out of the station.
- **Open Drawer –** Used to open an attached cash drawer that this station has access to. In many cases, the cash drawer won't need to be accessed from this module. An example would be if you are setup to have the customer pay at the front counter. In order for this button to be enabled the employee must have the "Can open cash drawer (no sale)" option checked in the employee editor as well as a cash drawer must be defined in the local config for this machine.

- **Calculator –** This will open the Windows calculator.
- **Manage –** This will open the Management Utility Program. The supervisor or manager password will be required to proceed. In order for this button to be enabled the employee must have the "Can run manager util" option checked inside of the employee editor.
- **Print Receipt –** This button will print a ticket for the currently selected table from the tables list. If you have divided up the ticket, you will need to choose which guest you are printing a ticket for (zero through nine). In order for this button to be enabled, the employee must have the "Can RePrint Receipts" option enabled in the employee editor, and the stations local config must have a receipt printer configured.
- **Reserve –** Reserve will reserve (or un-reserve) the currently selected table. You can also type in a reason from this screen. Reserved tables will not be available when seating guests. To make the table available again, you must un-reserve the table. Reserved tables will show up in the table list with a red line through them. Highlighting a reserved table will show the reason at the bottom status bar.
- **Close –** Closes the currently selected table, making it unavailable for use when selecting a table while seating guests.

Reserving vs. Closing – Reserving or closing a table has pretty much the same exact effect and any table closed or reserved by one server can be changed by any other server. You can also reserve or close a table that is already "in-use" so that it will not return to the available tables pool once the table has been bussed.

The Table List (left-side):

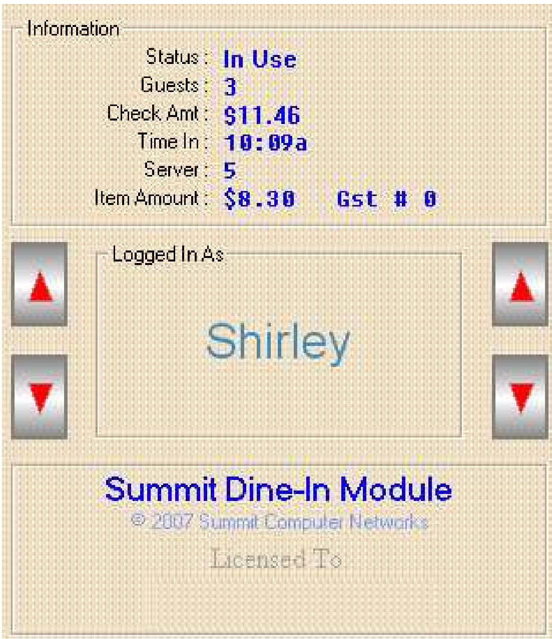


The table list by default will show only the tables that the current server is working with or has seated guests in. When "Show All" is selected for the table list, all tables in the database will be shown.

Closed tables will be black with a line through them, reserved tables will be in red with a line through them. Tables designated as non-smoking will be in black and tables designated as smoking will be in blue. By high lighting any table in this list you can see that table's status in the center section as well as any items that are on the current table if it currently belongs to the currently logged in server.

The red arrow up and arrow down buttons are to help scroll the list (page up, page down) for touch screen users. Most of the lists in the Dine-In module have these buttons next to them, and they all operate in exactly the same manner.

Center Info:



The center information section will show you various data on any table or item selected in the side lists as well as user and license information. The top portion of this area will show information about the currently selected table and any currently selected item for that table.

The **Status** will show the tables current status of Available, Closed, Reserved, In Use, Awaiting Bus, *J or some combination of these. The *J means that the currently selected table has been joined with another table. Tables are joined with neighboring tables whenever their capacity needs to be increased. Joined tables are handled as a single table.

Guests shows how many people are seated at the currently selected table.

Check Amt shows the total amount for the table (so far).

Time In shows the time that these guests were seated

Server is the current servers number for this table

Item Amount shows the price of the currently (if any) selected item as well as which guest it has been assigned to if you have setup any splits on the order.

The Middle section shows the currently logged in user ID or the station name if user logins have been disabled.

The bottom section shows the copyright and license information for the Dine-In Module.

The Items List (right-side):

The items list found on the right-hand side of the Dine-In Module main screen shows all of the items for the currently selected table. By highlighting any item in this list you can get more information about the item in both the center section (discussed above) and on the bottom status bar. Items with names longer than the list is wide will be truncated so you can see the full item name by highlighting it and looking at the status bar on the very bottom of the main program window.

Items in this list will be **Black**, Light Gray, or ~~Red Strikethrough~~. Black items are items that have been added to the order, light gray items have been paid for (only happens with partial payments or splits), and red items are voided items.

Function Buttons Section (bottom):

At the bottom most portion of the main program window you will find the function buttons and the status bar. The status bar gives you information about the currently selected item or table as well as the current node number and date and time.

Below we will discuss the purpose of each of the function buttons found in this section.

Seat Guests – This button will open the seat guests window and is used when initially seating guests in the dining area.

Settle – This button will settle a ticket for a guest number at the currently selected table.

Split Ticket – This button will open the split ticket window which will allow you to separate items on a table up to 10 different ways. Use this button to assign or re-assign items to guests.

Sections – This will allow you to open or close entire sections of your dining room. You can close sections while they are in use so that no further guests are seated in the section.

Add Item – Use this button to add item(s) to the currently selected table.

Quick Add – Use this to open the quick-add window for adding items to the currently selected table.

Add Non-Inv – Use this to add non-inventory items to the order for the currently selected table.

Bus Table – This table will change a tables status from "In Use" to "Awaiting Bus" if there are no un-settled items on it, and it will also change a tables status from "Awaiting bus" to "Available" if the table has been bussed.

Credit Tools – This will open the credit tools window which will allow you to reprint credit card slips or make adjustments to credit card orders so that tips may be added to that order after the customer has filled out and signed the credit slip.

Send To Kitchen – This will send any pending (unsent) kitchen items to the make-lines that are on the currently selected tables order. This allows you to send blocks of items as a group to your kitchen by adding the items in the block and then sending them.

Open Table – This will open a table that has been closed using the close button on the top toolbar. Closed tables are not available for seating guests.

Add Group – This button will allow adding an "Item Group" to the order for the currently selected table. See groups in POS Pizza for more information on item groups.

Edit Item – Allows you to edit the currently selected item, changing its quantity or toppings or modifiers. Editing items after they are sent to the kitchen will not re-send the item to the kitchen.

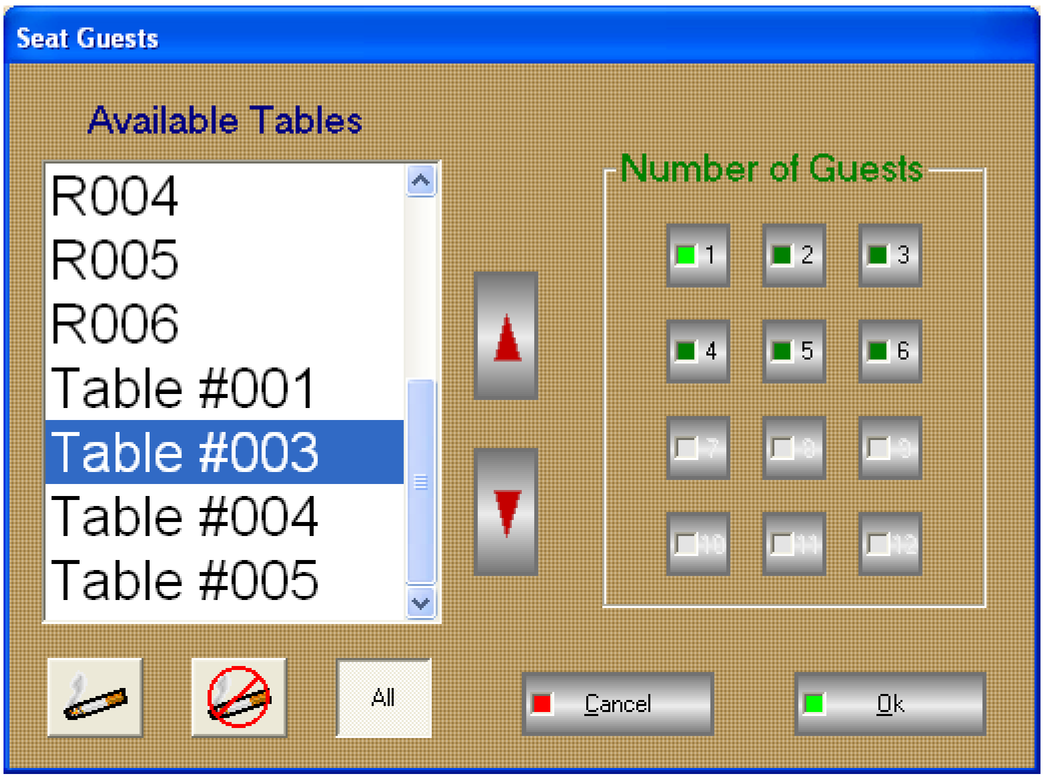
Void Item – This will remove the currently selected item from the table. ***Warning!!*** *You cannot void items once they have been sent to the kitchen. These items will not be able to be removed from the table at this point.*

Dine-In Module Walkthrough

This section will take you on a tour of the Dine-In Module by walking you through the entire process from the time that your guests arrive and are seated until they leave and the table is bussed returning it to an available table.

Seating the guests:

When your guests arrive you will seat them by using the "Seat Guests" button on the main screen.



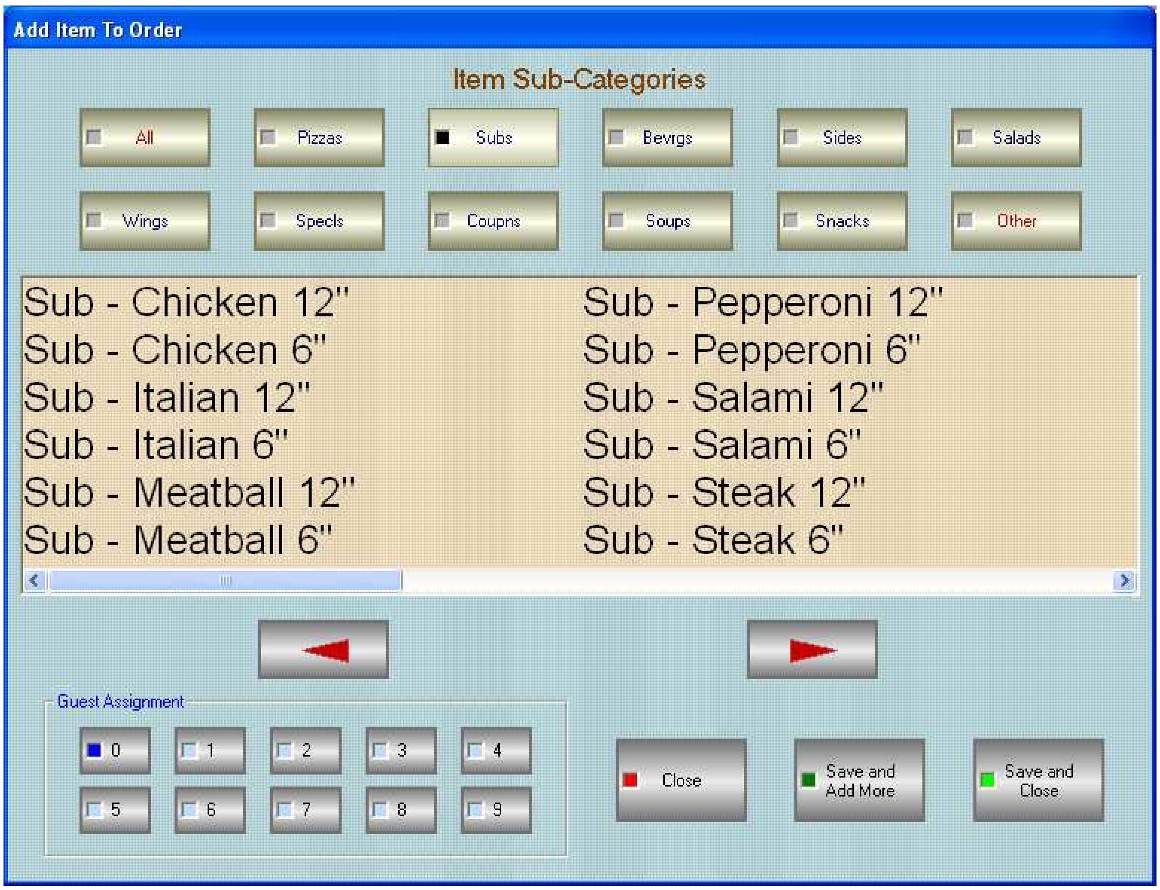
Select the table from the list on the left and then push the button on the right that shows the number of guests that you will be seating. In the example above the table can hold up to 6 guests (indicated by the dark green buttons which are available buttons) and **1** is the currently selected amount of guests. If you need to seat more than the table holds, you will probably slide two or more tables together or put them in a physical group in your dining room. To do this within the Dine-In Module, select more than 1 table and then set the total number of guests.

You can also filter tables by whether or not they are in a smoking section or non-smoking section by using the buttons at the bottom of the list. If you click on the lower right hand button, it will show you all available smoking tables. The **All** button will show all available tables both smoking and non-smoking.

Once you have selected your table(s) and the guest count, click on the **Ok** button to seat theses guests. These tables will now show up in your current list of tables and will be ready to have items added to the associated order.

Adding Items:

To begin adding items to a table we will first select that table from the table list on the left-hand side of the main program window. After selecting the table click on the **Add Item** button and you will see a window like the one pictured below.



On this window you can begin picking items and adding them to the order. You can use the top filter buttons to filter out all other items except those that belong to that buttons group. To see all items use the "All" button. You can also select which guest to add the item to if you want to split the ticket multiple ways. You can do this now, or you can easily do this later using the **Split Ticket** button. If you make a mistake assigning items to specific guests it also does not matter because they can easily be re-assigned using the **Split Ticket** button as well.

Highlight the item that you want to add and then click one of the save buttons. One will add the item and allow you to select another item without closing this window (Save and Add More), and the other will add the item and close this window (Save and Close). If you double-click an item using a mouse it will be the same as highlighting it and then clicking Save and Close. Whenever you save any item its modifiers screen will open unless it is set not to. You can verify your newly added items once this window is closed by examining your items list. This is a good time to remove or edit any mistakes.

Once you have added your initial items to the order you will want to submit them to the kitchen. Do this by clicking on the **Send To Kitchen** button at the bottom part of the main program window.

Your items are now ready to be cooked and then served to your guests. New items can easily be added to the table at any time by simply adding more items. Other types of items that can be added are groups, non-inventory, and quick-add items.

Non-Inventory Items can be anything you want to add to the order that cannot be found in the current item database. Non-Inventory Items can be coupons and discounts by using a negative price on the item. By adding a non-inventory item, the item will be added to the last guest number that you added a regular item to.

Groups can be added to an order as well using the **Add Group** button. A group is a group of items that may be priced as a special together. *See number coded groups in Main POS Module.*

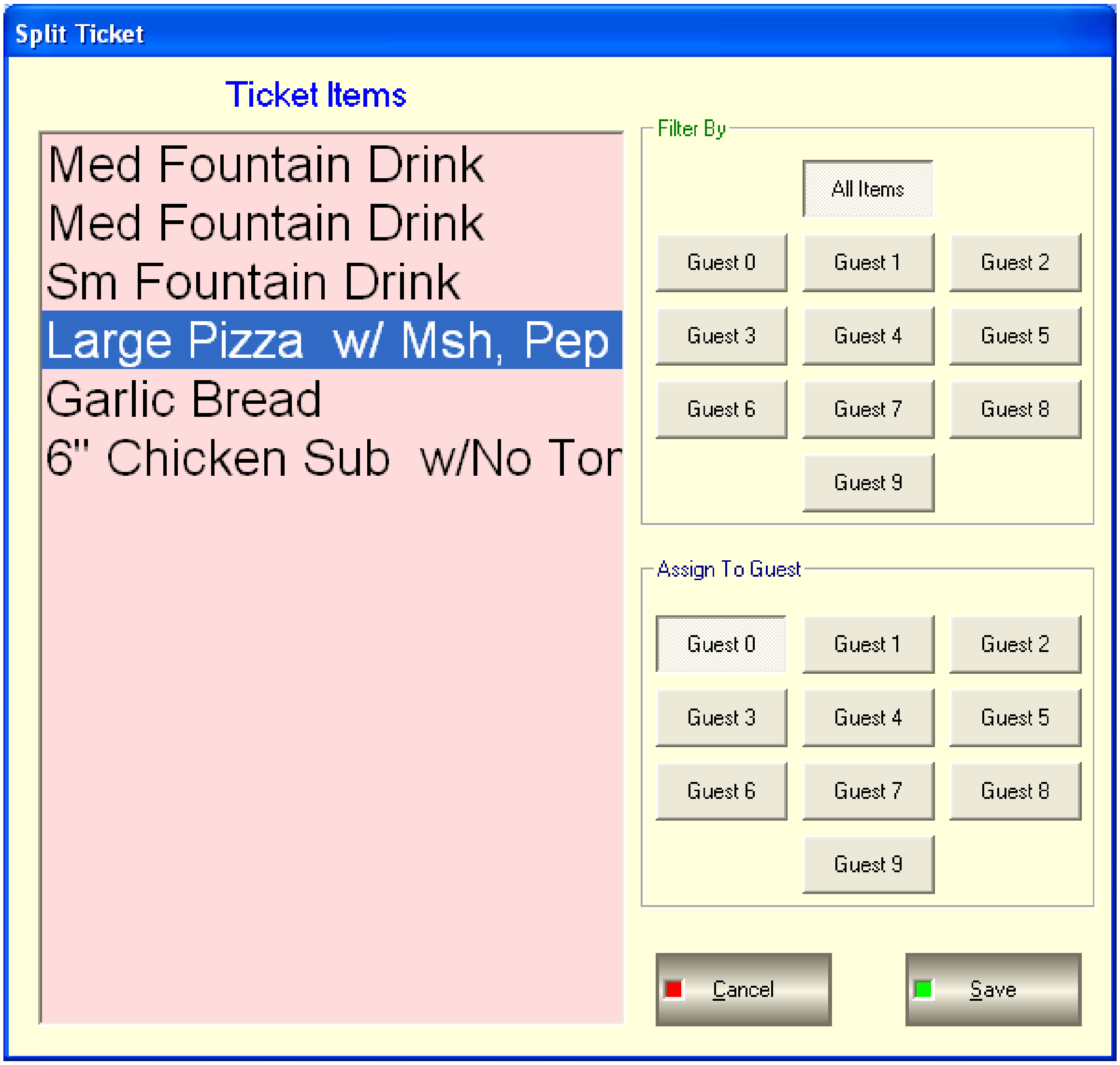
Quick Add is a way of adding items that are commonly used in your restaurant like beers or other common items. This module is shown in the image above.

Pressing any of the buttons in the quick add module will add that item to the pending items list. Pressing the button twice will add the item twice. Use the clear last button to remove the last item or group added, and the clear all button to completely empty the list. Once you have added the items that you want to your list, click on the “Add To Order” button to add it to the currently selected tables order.

Again, anytime that you add items to your order you should submit them to the kitchen whenever you are finished. Otherwise they will have no way of knowing what you added to your order.

Splitting the ticket:

If you have a group of guests who wish to pay for separate items on separate tickets, you will need to separate these items for those guests. The Dine-In Module can slit an order up to 10 different ways. To do this you can assign items as they are added (as mentioned above), or you can use the **Split Ticket** feature at any point during or after the items have been added.



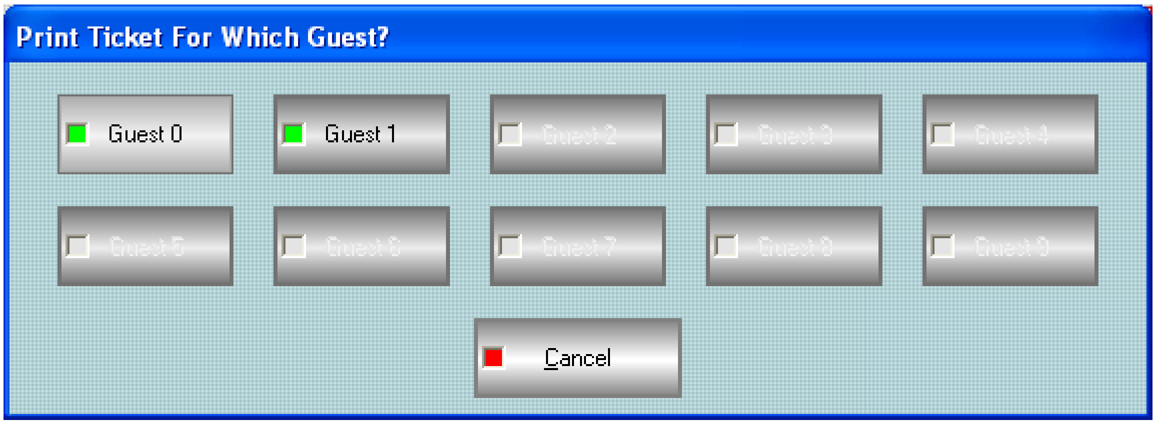
Whenever you open the "Split Ticket" window (shown above) you will see several groups of buttons on the right-hand side of the window. The top group is the "Filter By" buttons. Selecting a guest will show only that guests currently assigned items. Selecting "All Items" will show all of the items on the order.

To assign an item, highlight the item in the list on the left and then click on a guest assignment button in the "Assign To Guest" button array in the mid right section. You can highlight each item and see which guest it has been assigned to, or use the filter buttons at the top to view a specific guest.

Once you have made all of the changes that you want you will need to click the "Save" button to apply these changes to the order and close this window. The cancel button will simply close the window and ignore any changes that were just made.

Closing Tickets and Checking Out:

After you have split up your ticket, you will then want to print slips for each of your guests. If there were no splits you will simply print a ticket for the default guest (zero). Use the **Print Receipt** button located on the top toolbar to print the guest tickets.



When you click the button, you will see a window showing you which guest numbers currently have been assigned items and you can print a ticket for that guest by clicking the respective button. Once you are finished printing click the “Cancel” button to close this window.

Whenever a guest is ready to settle their ticket, you can use the **Settle** button at the bottom part of the main program window. When selecting this button you will see a window much like the print ticket window asking for which guest to settle. Choose the guest to settle and then you can process the payment.

Depending on your setup, the ticket may be immediately sent to the front counter station for payment or you can process the ticket at the current station. If it is setup for processing at this station, you will see a window like the one below.

Select the payment type or "Pay at front counter" and then click on the green check button to finalize the order payment.

If you use in-house tabs, you can assign the order to a tab by first selecting a customer from the customer database using the "Select Customer" button, and then selecting the "Account / Tab" payment type if it is allowed for the currently selected customer. After selecting a customer you can also apply any credits that this customer may have to this order. In most cases you won't ever select a customer for the Dine-In module.

The gift card payment is not available at this time. This is a future plan for the overall POS system that has been put here so that it can be easily added to this module when it is ready.

If you are using internal credit card processing (see update pack docs for more information), then you when you select Credit Card as a payment type you will be prompted to swipe the card. If you are using external processing like a credit card machine, you will process the card on the machine and then just select this type here.

When internal credit processing is being used, the Dine-In Module will print a credit card ticket to be signed by the customer and will have a **Tip** field that the customer will be able to write in a tip amount. If you fill in a payment amount in the above window, this write-in field will be omitted from the ticket and the tip will be automatically calculated based on the amount entered. Normally you would leave the amount field at zero.

If you select the pay at front counter option, all payments will be made from the Main POS Module located at the front counter. The dine-in order will be sent to that module so that it can be cashed out by the front cashier. If this is the default setting the above screen will not even show up.

After payment:

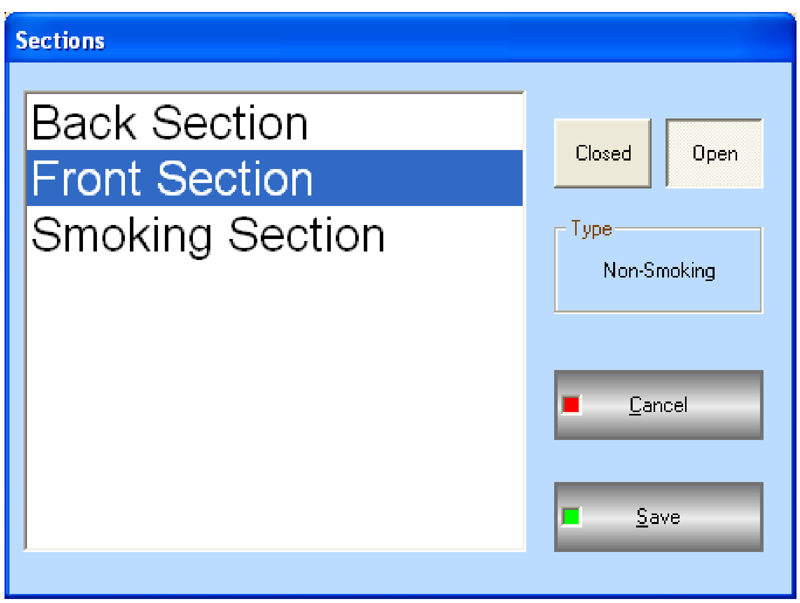
Once you have settled all of the guests that are associated with a specific table you can then ready the table for bus. This may be done automatically whenever the last remaining ticket is settled depending on the main configuration of the program. You can always add new items to any remaining unpaid tickets or even to entirely new guests while a table is in use. You cannot add any new items for a guest that has already been settled however.

Other Tasks:

The only other things that you may need to do with the Dine-In module would be reserving, and closing tables.

Closing Tables:

Tables can be closed individually or by the section. Closing of sections is handy whenever you are at slower times and want to close off an actual section of your restaurant. Sections can be opened or closed by clicking on the **Sections** button located in the bottom center part of the main window. Whenever you click this button you will be shown a list of your sections like the example below.



By highlighting a particular section you can quickly see its status by looking at the ***Open*** or ***Closed*** buttons. You can change the status by simply clicking on the status that you would like to assign to the section and then using the save button to commit the change.

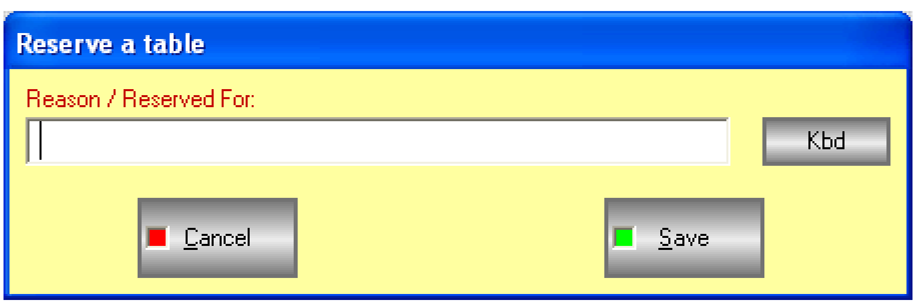
You can also close tables on an individual basis (one by one). To do this use the “Close” button located on the top toolbar on the top part of the main window. You must first highlight the table from the left-side table list that you wish to close and then click the close button.

To re-open a previously closed table, you will highlight the table from the left-side table list and then use the **Open Table** button located in the bottom center part of the main window. If the section has been closed, refer to the paragraph above to open the section.

Reserving Tables:

Reserving tables does exactly the same thing as closing a table internally. It makes the table un-available for seating guests. The primary difference is that the table will be flagged as reserved and will show a reason or a “reserved for:” note along with it.

To reserve a table highlight the table that is to be reserved in the left-side tables list and then click the “Reserve” button located on the top toolbar on the top part of the main window. You will be presented a window where you can type in a reason that the table is being reserved. If you are using a touch-screen use the little **Kbd** button on the right side of this box to open the on-screen keyboard. Enter in the reason that you are reserving the table and then click on the **Save** button to reserve the table.



Once a table is reserved it can be ***un-reserved*** by once again highlighting the table from the left-side tables list, and then clicking on the “Reserve” button on the top toolbar. This button will serve a dual function both reserving and un-reserving a table.