

# F&B POS Manual

2016 - Fall Edition

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# Overview

In this manual, we will discuss the various functionalities within our F&B POS System.

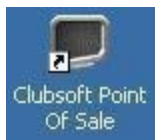
## Use Case(s)

The F&B POS system is used in Dining Rooms, Snack Shops, and other areas of the Club (Bar for instance), where food and beverages are transacted.

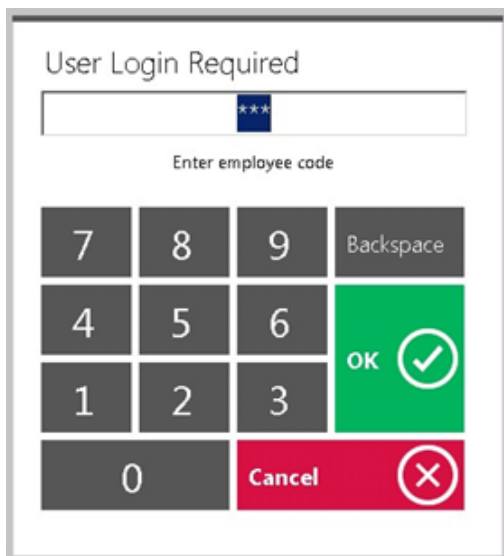
## Accessing the Tool

To access the POS,

- 1) Click on the **POS Icon**.



- 2) A logo will display moving around the screen, click anywhere on the screen to get the user login prompt. Enter your Employee **Swipe Id** (the number assigned to each user).



If you are using the Office system to **track hours**, an additional screen will display prompting the user to select a **Job Code**.



If the user only has one Job Code assigned to their employee profile, it will display “**you have successfully logged in**”.

## Opening a Ticket

In this section we will discuss the necessary procedures to follow when opening a ticket.

- 1) If you have any open tickets they will be displayed on the **Tickets Tab**: you can touch or mouse click to open the ticket.
- 2) To open a new ticket, click on the green **Select Table** button.



**Notes:**

- The **Tickets** screen should be **blank** before running the **End of Shift Report**.
- If you see tickets listed in the Tickets Tab in yellow, these are Credit Card tickets that have not been fully closed. This requires the final step of “Adding the Tip” for this ticket to be completely closed. If there is no additional tip to add, double click the yellow highlighted ticket, select **Do Not Process** and click **OK**. Depending on your Credit Card processor, please refer to either our **ETS or Openedge Credit Card Transaction** manuals for more information on Credit Cards.

ID	Full Name	Area	Table	Ticket #	Server Name
001	OH/GRL SCOUTS OF	Cafe	[Quick Ticket]	26615	Administrative User
001	GUEST, ACCOUNT	Lounge	[Quick Ticket]	27904	Administrative User
001	GUEST, ACCOUNT	Lounge	[Quick Ticket]	27905	Administrative User
157-3	Ackermann, Angus	Lounge	[Quick Ticket]	32279	Administrative User
707-2	Takas, Abby	Lounge	[Quick Ticket]	32280	Administrative User
157-3	Ackermann, Angus	Lounge	[Quick Ticket]	32597	Administrative User
157-3	Ackermann, Angus	Lounge	[Quick Ticket]	32598	Administrative User
001	GUEST, ACCOUNT	Lounge	[Quick Ticket]	32806	Administrative User
001	Michael Christensen	Cafe	Table 2 - 1	37462	Administrative User

Enter ticket gratuity (Total: \$0.01)

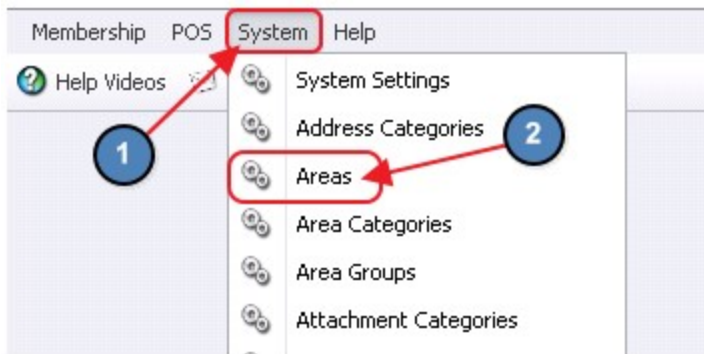
Re-Open Ticket      Gratuity: \$0.00

7	8	9	Backspace	5%
4	5	6	OK ✓	10%
1	2	3	20%	
0	Cancel ✕	Calculator		

Do not process

Print settle ticket on dose

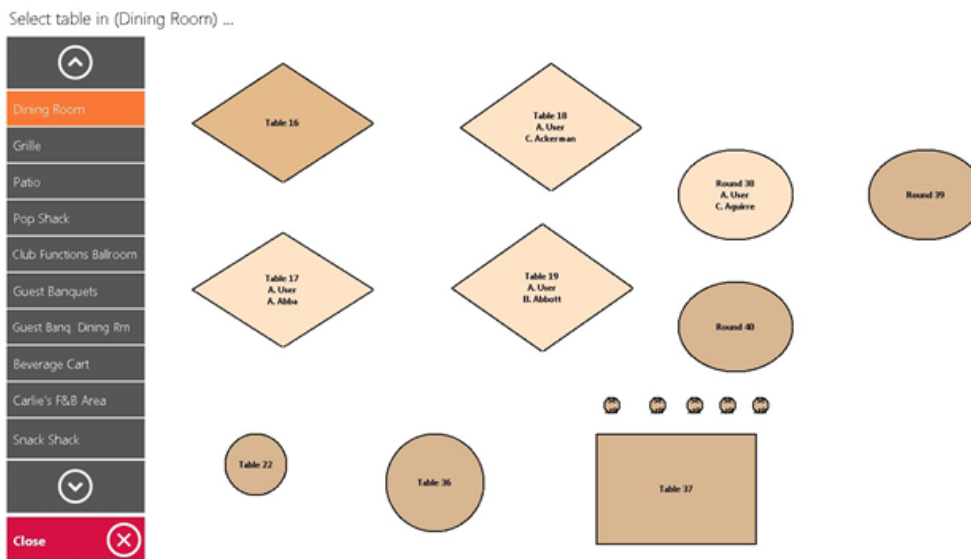
- The **Tickets** display can vary depending on what columns you want to see. Columns can be removed or added in **CMA**. To do so, please navigate to **System** across the top toolbar and choose **Areas**.



Double click on the Area in question and navigate to the **Open Tickets** tab on the left pane. Once on the **Open Tickets** tab, select/unselect the column headers that you would like to see.

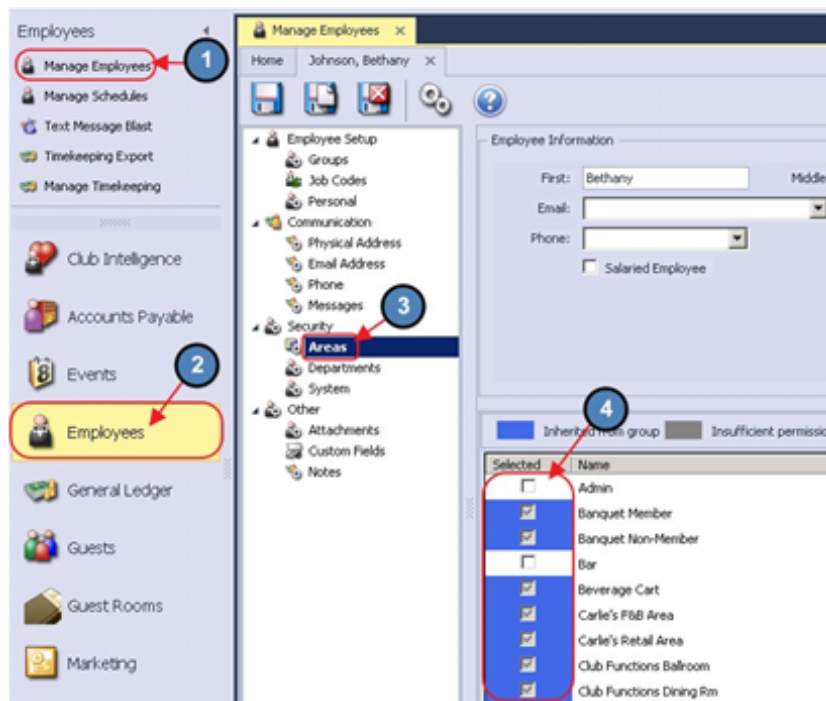


3) Select the **Area** and **Table**.



**Notes:**

- If the table has an open ticket it will display the server and member name. If there is more than 1 ticket on the table it will display the server and how many tickets are open on the table.
- The **Areas** displayed on the left pane can vary depending on individual security rights; if you only work the Beverage Cart you may only see the Beverage Cart Area and may not see any others. If you do not see an Area listed that you should, have the manager check your **Employee** setup.
  - To check an employee's setup, navigate to the employee's profile in **Manage Employees** and select the **Areas** tab. Any Area that is not selected on the tab will not show in the POS.



- Each Area must have unique **Table Numbers**; you **cannot** have the same table number in two different active **Area Layouts**. All orders and transactions made on a table will apply to all tables with the same number in addition to other serious problems.
- Each sales area can be configured independently with regards to settings for such things as cover requirements, tax & service charge rules, ticket layouts, GL coding, gratuity options, settlement options, etc. Most of which can be controlled within the Areas settings. Please refer to our **F&B Areas** manual for more information on Areas.

- 4) **Member Lookup** - Enter the Member Number or Member Name. If this is not a member, select **Guest**.

As you are typing the number or name, the screen will display the results. Highlight the member to be assigned to the ticket and hit **Enter**, or touch the member name, or mouse click on the name to select.

Find Member

Full Name	Member Number	Member Type	Age
Smith, Gale	2	Corporate Golf Junior	62
Smith, Carlie	503	Corporate Golf Junior	36
Smith, Gillian	3106	Other Clubs	
Smith, Joe	546	Social	
Smith, John	508	Senior Golf	
Smith, John	518	Corporate Golf Junior	
Smith, Martha	1000	Corporate Golf Junior	47
Smith, Rita	3239-1	Sp-Junior Corporate Golf	

**Notes:**



- If the **Contains** button is highlighted, the system will search all name columns displayed on the screen that meets the search criteria including First name, Last name, and Member Type.

**Example:** if you key in John, the system will display all the names that have John in the first or last name such as John, Johnson, Johnnie, etc, or if you key in the name of the Member Type only those members in that type will display. **This is the preferred setting.**

- If the **Starts With** button is highlighted, the system will only look at the beginning of how the Name is displayed.

**Example:** if the name is displayed as Aaron, Amy R your search criteria will need be Aaron (not Amy). This is not the preferred setting and often is a support call because a server accidentally hit the **Starts With** button.

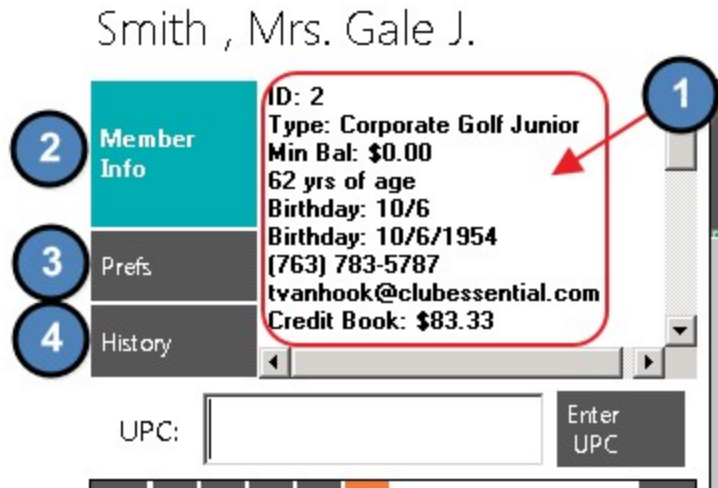
- The **Hide Dependent** button gives user the option to filter out the dependents and spouses from the member display.
- You can sort the screen by each column by touching or clicking the column heading.

## Navigating the POS Screen



**Note:** There are important areas to point out on the POS screen.

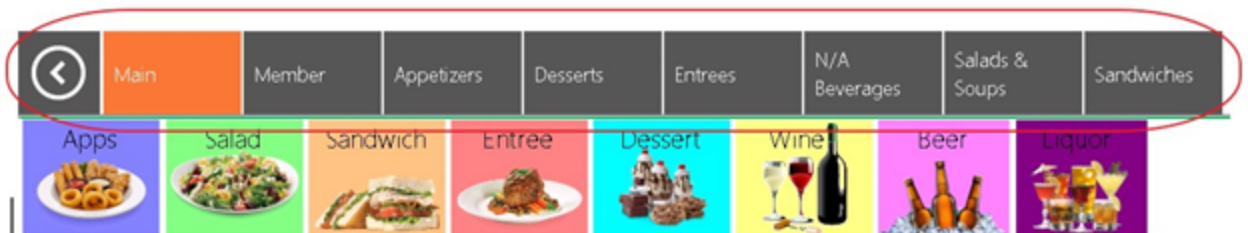
- Top Left Corner** – The information viewed here can be customized using the information in the member file. Each sales Area can display different information. There is various member information available for display (this will be discussed in more details in Area setup). If you click on **Member Info** the system will take you to additional information about the member and family. **Prefs** is an area you can add information about the member such as favorite clubs, color, etc. **History** will show closed tickets from current day and previous days.



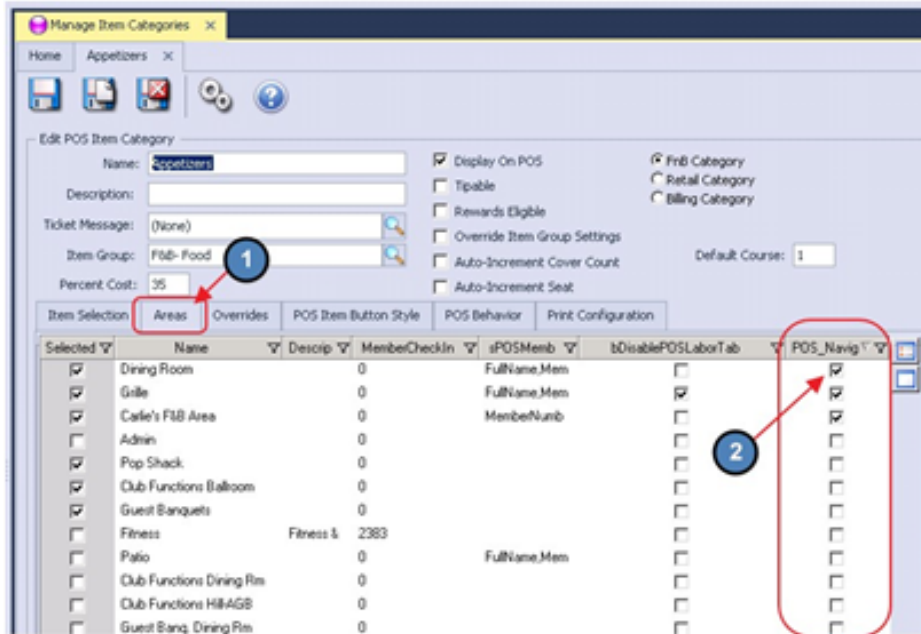
- Top 1<sup>st</sup> Line** – Displays ticket information: **Ticket Number, Date/Time Opened, Server, Area, Table, and how long ticket has been open** in minutes.



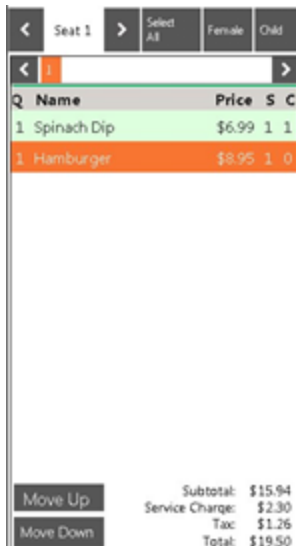
- Top 2<sup>nd</sup> Line** – User can choose what **Item Categories** to be listed on the bar for quick access.



This setting is found in **Manage Item Categories**. Select the Item Category in Question and Navigate to the **Areas** tab. Then, select the **POS\_Navigation** column (last column to the right); next to the Areas to display the category at the top of the POS screen.



- **Left Middle** – Is the Ordering Screen; it lists the items that have been rung up.



- **Middle** – The Screen Group Layout is user defined: buttons can be setup to access a single Item, Item Category, Combo, single Modifier, Modifier Group, or another Screen Group.

 Apps	 Salad	 Sandwich	 Entree	 Dessert	 Wine	 Beer	 Liquor
King Crab Cakes (x86)	Caesar Salad	BLT	Filet Mignon 8oz	Ice Cream	House Chard	Bud Light	Liquor A-J
Spinach Dip	Seafood Salad	Burger	Pork Medallion	Cookie	House Cab	Coors Light	Liquor K-Z
French Fries	Soup Salad Combo	Clubhouse	BBQ Ribs	Dessert Tray	House Merlot	Amstel Light	Liqueur & Spec
Kobe Sliders	Soup Du Jour	Tuna Melt	Simply Pasta	Sundae	House Wine- Btl	Corona	Popshack Liqour
Add On \$		General Modifiers		Daily Specials		N/A Beverages	

- **Bottom** – The buttons across the bottom of the screen are system defined and triggers different functionality; see below for a brief and then more in-depth description of each button.

 1 Delete Item	 2 Add Message	 3 Change Modifiers	 4 Change Qty	 5 Change Seat	 6 Add Ticket	 7 Delete Ticket	 8 Upcharge Item	 9 Change Table	 10 Charge Table	 11 Save Pref	 12 Quick Cash	 13 Quick Charge	 14 Close Ticket
 15 Exit	 16 Discount Item	 17 Comp Item	 18 Multi Off	 19 Change Course	 20 Get By Bin	 21 Reorder Item	 22 Cover Count	 23 Change Member	 24 Coupon Lookup		 25 Print Ticket	 26 Split Ticket	 27 Send

## POS Main Button Functionality

### Top Row

1. [Delete Item/Void Item](#) - User can delete an item from the order providing it has not been sent to the remote printer. Button will change to Void Item once item sent to remote printer.
2. [Add Message](#) - User can add additional message or prep instruction for an Item.
3. [Change Modifiers](#) - User can add, change, and delete item modifiers.

4. [Change Qty](#) - User can change the QTY on an item (including making quantity negative for a credit).
5. [Change Seat](#) - If using seat positions, this allows you to assign or change the seat.
6. [Add Ticket](#) - Gives the ability to open another ticket without exiting the POS before completing the first ticket. You can move back and forth to all open tickets from the POS screen.
7. **Delete Ticket** - Will delete current ticket.
8. [Upcharge Item](#) - Will prompt for an amount to override and increase the price of the item.
9. [Change Table](#) - Use if a member wants to move to a different Table or Area or to join tickets.
10. [Charge Tab](#) - Button is used to capture Credit Card information at beginning of a transaction instead of waiting until settlement to swipe the card.
11. [Save Pref](#) - System will save how the member likes his/her item prepared with modifiers.
12. [Quick Cash](#) - One step process to close the ticket to Cash.
13. [Quick Charge](#) - One step process to close the ticket to Cash.
14. [Close Ticket](#) - Take users to a settlement screen with more closing options.

#### **Bottom Row**

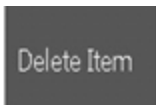
15. [Exit](#) - Will exit the POS screen back to the main screen.
16. [Discount Item](#) - Gives users the ability to discount an item. Requires security rights.
17. [Comp Item](#) - Give users the ability to comp an item. Requires security rights.
18. [Multi Off](#) - Used in conjunction with Delete Item, Void Item, Discount Item, and Comp Item; when (ON) users can select multiple Items.
19. [Change Course](#) - If using coursing, user can use this to change the default course for an item.
20. [Get By Bin](#) - Used to lookup Wine bottles by Bin Number.
21. [Reorder Item](#) - Used in conjunction with Multi Select (On) to reorder items already 'Sent'.

- 22. [Cover Count](#) - Used to change the cover count at any time.
- 23. [Change Member](#) - Used if the member to be billed needs to change for any reason.
- 24. [Coupon Lookup](#) - This button will turn Green to alert the server if the member has a promo coupon available to redeem.
- 25. [Print Ticket](#) - Prints the pay receipt ticket for signature prior to closing the ticket.
- 26. [Split Ticket](#) - Used if more than one ticket is required on a transaction and to edit separate tickets.
- 27. [Send](#) - Will send order to remote printers.

### Delete an Item

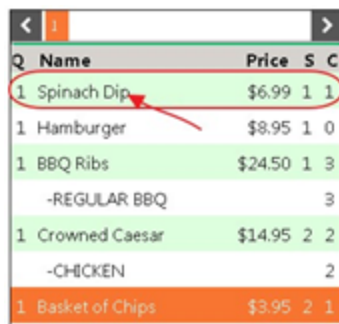
User can delete an Item from the order.

- 1) Highlight the Item to be removed from the ticket and click **Delete Item**.



#### Notes:

- If you have more than one item to delete, follow the [Multi-Select \(On\)](#) instructions.
- **Delete Item** button only displays if you have not sent the item. Un-Sent items will be listed in Black.



Q	Name	Price	S	C
1	Spinach Dip	\$6.99	1	1
1	Hamburger	\$8.95	1	0
1	BBQ Ribs	\$24.50	1	3
	-REGULAR BBQ		3	
1	Crowned Caesar	\$14.95	2	2
	-CHICKEN		2	
1	Basket of Chips	\$3.95	2	1

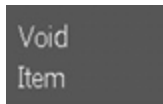
- The button name changes to **Void Item** if an item has been sent and will display in Red.

Q	Name	Price	S	C
1	Spinach Dip	\$6.99	1	1
1	Hamburger	\$8.95	1	0
1	BBQ Ribs	\$24.50	1	3
	-REGULAR BBQ			3
1	Crowned Caesar	\$14.95	2	2
	-CHICKEN			2
1	Basket of Chips	\$3.95	2	1

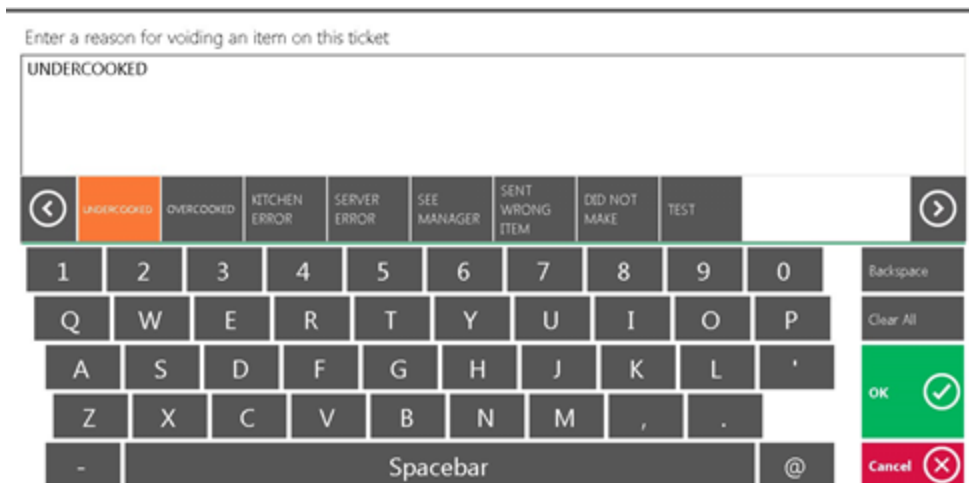
### Void an Item

As mentioned, when an Item is sent to the kitchen it will display in Red and the **Delete Item** button will change to **Void Item**.

- 1) Highlight the Item to be voided from the ticket and click **Void Item**.



- 2) Select a **Void reason** or key in a reason. **Void reasons** are optional, if you do not get this prompt then you are not setup to track reasons. For more information on setting up Void reasons, please refer to the **Buttons** section of our **F&B Areas** manual.



- 3) A message box will pop up if you do not have **security rights** to void. You will need to get a manager to continue. Select **YES** and **Enter Pass Code**.

### Delete authorization needed

At least one of the items marked for deletion has already been sent.  
You are not authorized to delete sent items. Would you like to enter  
the passcode of an employee that has this permission level?



**Note:** If you have more than one item to delete, follow the [Multi-Select \(On\)](#) instructions.

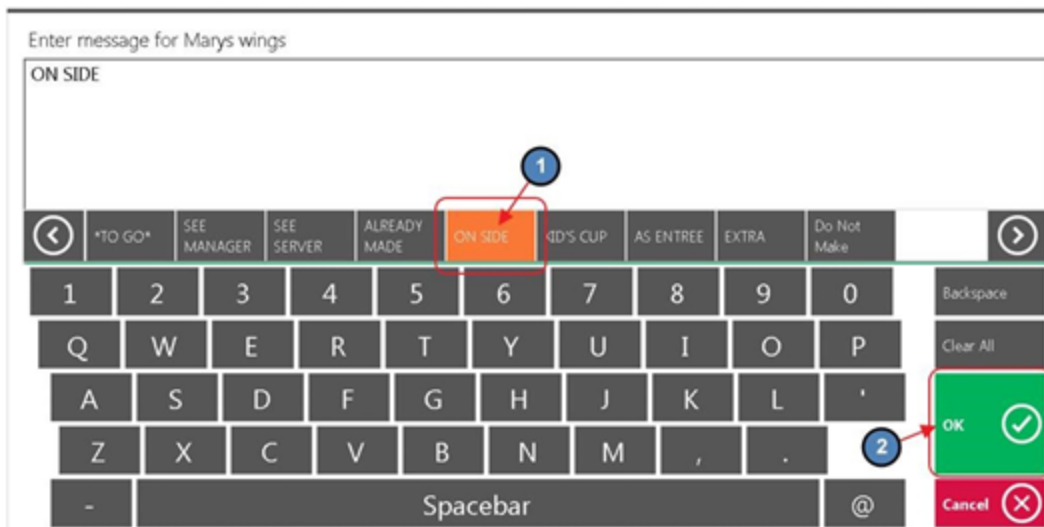
### Add Message

User can add additional message or prep instruction for an Item.

- 1) Select the Item to add a message too and click on **Add Message**.



- 2) The screen will pop up a listing of predefined messages. Select a predefined message or key in a message. Click **OK when finished**.



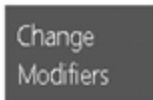


**Note:** Standard predefined messages can be created to show on an Area by Area basis. For more information on setting up predefined messages, please refer to the **Buttons** section of our **F&B Areas** manual.

## Change Modifiers

User can add, change, and delete item modifiers.

- 1) Highlight the **Item** to modify and click **Change Modifier**.



- 2) A box will display listing of all modifiers on the Item.

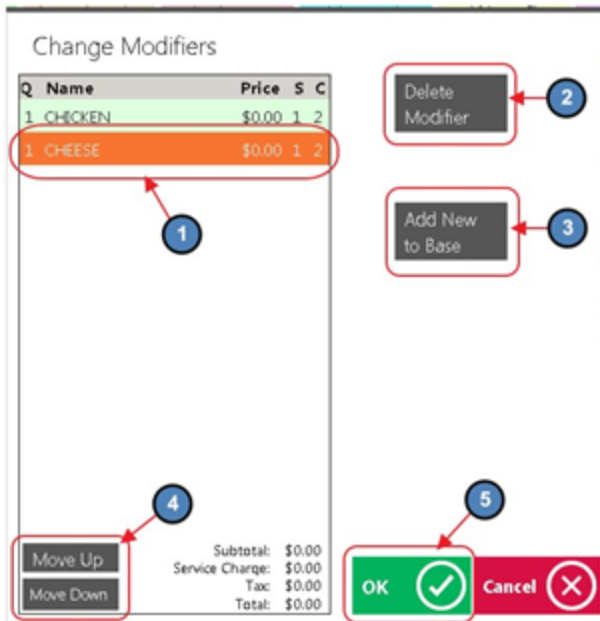
Highlight the Modifier to change.

On the right side, select one of the following options:

- a) **Delete** if the modifier highlighted should be removed.
- b) **Add New To Base** if another modifier is to be added to the list.

Use the **Move Up and Down buttons** to rearrange the modifier order.

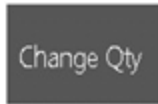
Click **OK** when finished.



## Change Quantity

User can change the QTY on an item (including making quantity negative for a credit).

- 1) Highlight the Item and click **Change QTY**.

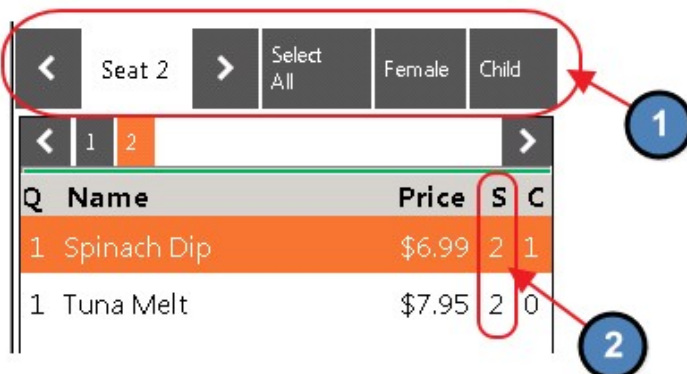


- 2) Enter QTY. When entering a negative QTY, select the **minus (-) sign** first and then select the amount of the negative QTY. Use the **More** option to enter quantities greater than 19.

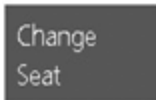


## Seat Position

Before selecting any Items, use the arrows above the Item details to set the seat position. Select **Female or Child** if applicable (optional, see notes). Begin selecting Items to order.



- 1) If you need to change the seat position, click **Change Seat**.



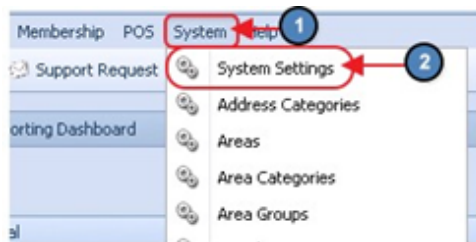
- 2) Select the correct seat number.



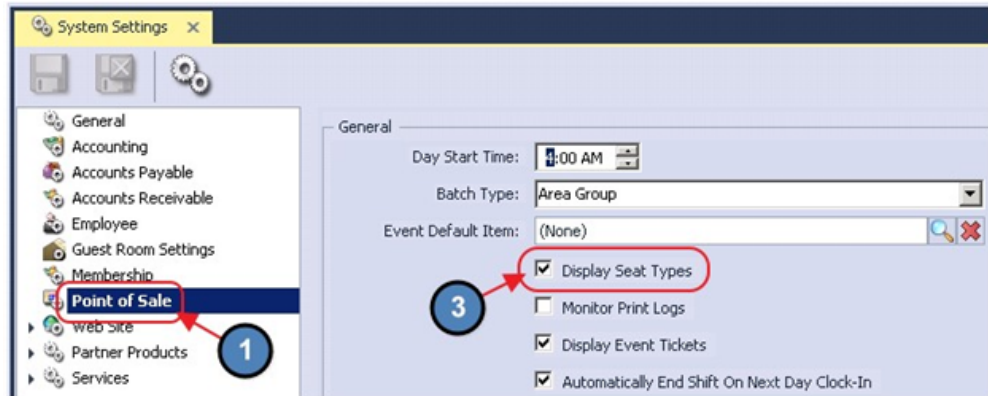
**Notes:**

- You can add or remove the Female and Child button.

- 1) In CMA, navigate to **System** across the top toolbar and select **System Settings**.



- 2) Select **Point of Sale** on the left pane and check/ uncheck **Display Seat Types**.



- The seat position selected for the Item is displayed in the ordering screen in the column labeled **S**.

Q	Name	Price	S	C
1	Spinach Dip	\$6.99	2	1
1	Tuna Melt	\$7.95	2	0

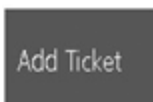
The 'S' column in the table is circled in red, with a red arrow pointing to the value '2' in the second row.

- Seat number can be modified before and after Items are sent.
- Seat numbers can be used for splitting tickets.

### Add Ticket

Gives the ability to open another ticket without exiting the POS before completing the first ticket. You can move back and forth to all open tickets from the POS screen.

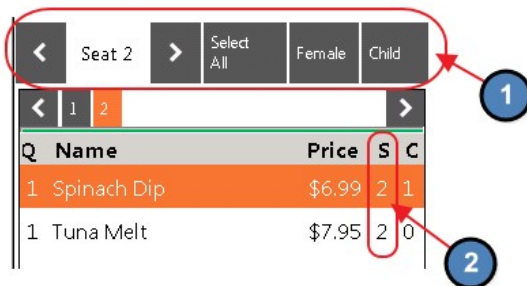
- 1) Click **Add Ticket**.



- 2) Search and select the member or select **Guest** if this is not a member.



3) If you have more than 1 ticket open you will see buttons labeled 1, 2, 3, etc. For each ticket, click on the seat you wish to work with.



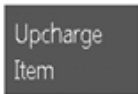
**Notes:**

- User can see what member is assigned to a ticket by the information at the top left corner; which will show member number and name. Other information displayed is also specific to the member on the ticket.
- There is no limit to how many tickets you can have open.
- You can place orders on all tickets; when you hit send the orders will be combined on 1 prep ticket for the kitchen or bar.
- Please see our **Split Ticket** manual for further information on editing separate tickets.

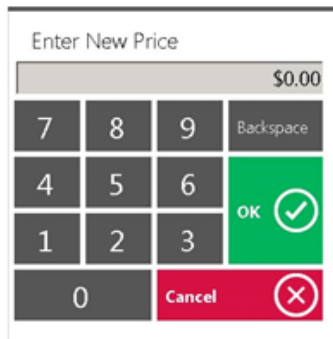
## Upcharge Item

Will prompt for an amount to override and increase the price of an item.

- 1) Highlight the Item, click **Upcharge Item**.



- 2) Enter the amount to override the price.

A dialog box titled "Enter New Price" with a text input field showing "\$0.00". Below the input field is a numeric keypad with buttons for digits 0-9, a "Backspace" button, an "OK" button with a green checkmark, and a "Cancel" button with a red 'X'.

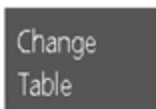
### Notes:

- The amount entered must be greater than the item price. If you want to decrease the price, use the **Discount Item** option.
- You can upcharge before or after **Send**.

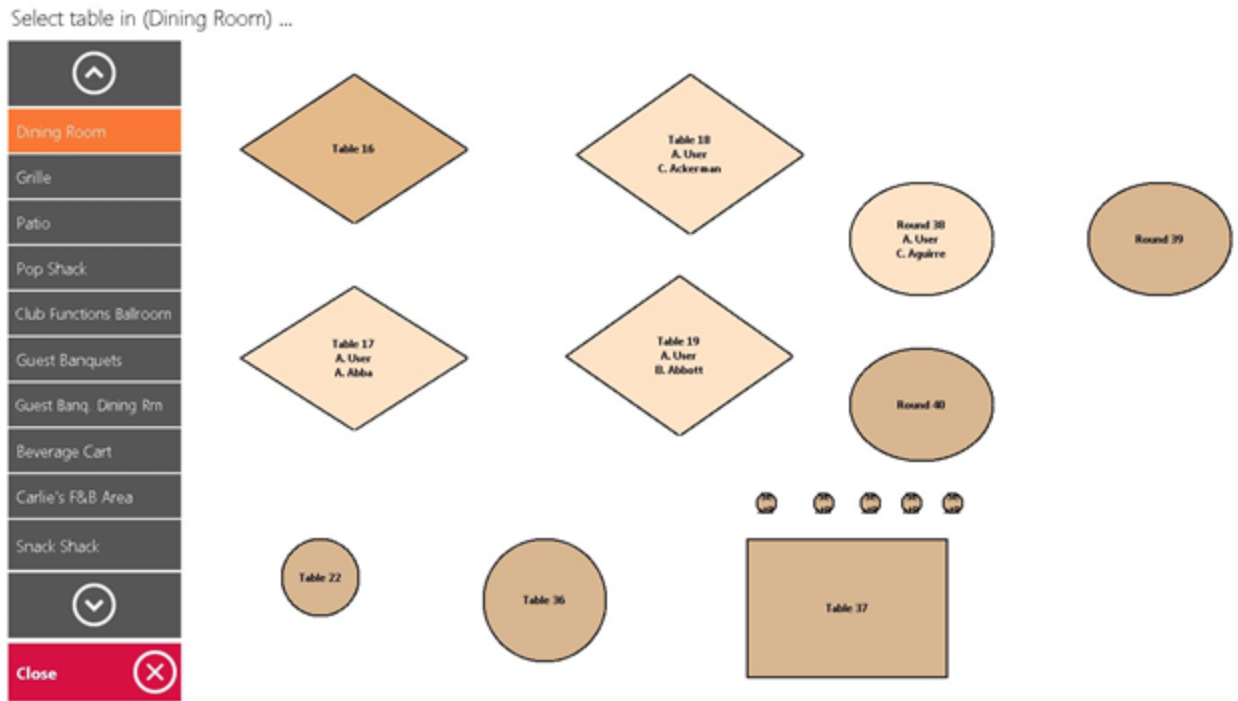
## Change Table

Use if a member wants to move to a different Table or Area, or to join tickets.

- 1) Within the ticket, select **Change Table**.

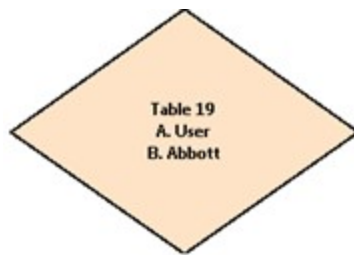


2) The user will then be prompted to select a new Table or Area.



**Notes:**

- When moving tickets to a different sales Area; the screen layout might change depending on the setup. **The orders placed previously will remain on the ticket but get credited to the Area in which the ticket is closed.**
- You can use this function **to join tables** by selecting an occupied table. It will be handled the same as the **Add Ticket** function.



**Charge Tab**

**Charge Tab** is used to store the Credit Card on the ticket at the time the ticket is opened as opposed to swiping the card at the end when closing. Mainly used by clubs who allow

nonmember visits; this allows them to capture the Credit Card information before the sale.

If the user wants to capture the Credit Card before the sale, it must be done **before any items have been entered**.

- 1) Select **Charge Tab, Swipe the Card** or select **Continue** to manually enter the card information.



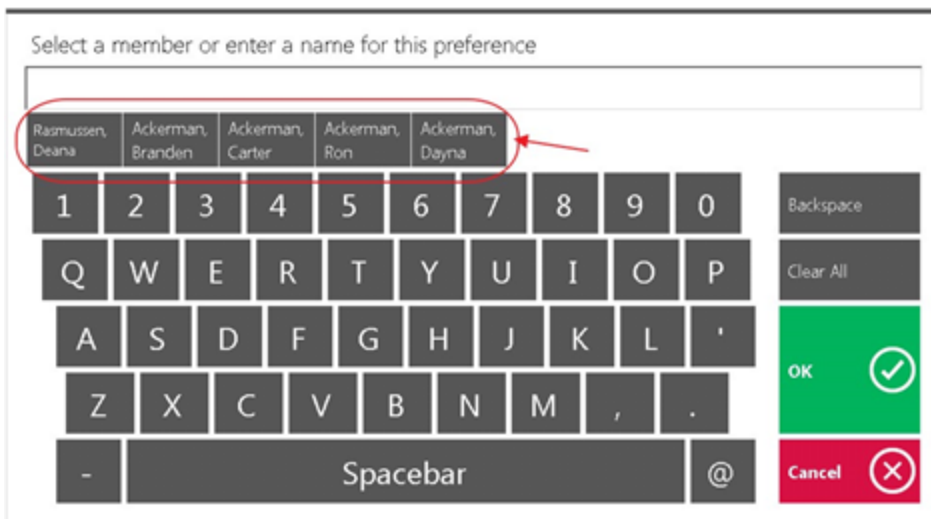
### Save Pref

System will save how the member likes his/her item prepared with modifiers.

- 1) Select the Item and complete the order with modifiers and messages. Highlight the Item and click or touch **Save Pref**.



- 2) A window will populate displaying the member's entire family. Select the **family member** for which you are saving the preference.



- 3) If a preferences has been saved for a member or family member, **one or more buttons** will display at the **bottom** of the first modifier screen when the Item is



ordered. Click or touch the **person** the order is for. The modifiers and messages saved in step one will automatically display. See **Notes** on member preferences.



**Notes:**

- If the member decides to order the dish differently than the saved preference, simply continue with the order as normal.
- You can change the saved preference by following the steps above and saving to the Item again for the member. This will overwrite the first saved preference.

**Quick Settlement Close**

There are two settlement types available for closing the ticket with one step, Cash and Member Charge. These options do not give you the ability to add additional tip, get change amount, or split tender. For more closing capabilities select **Close Ticket**.

In the POS ordering screen, select **Quick Cash** or **Quick Charge**.

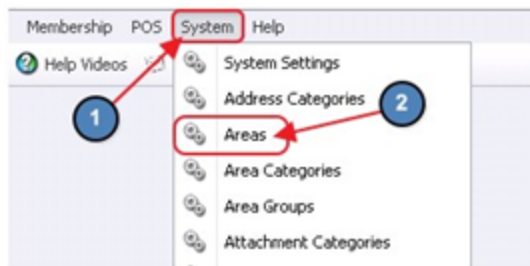


**Notes:**

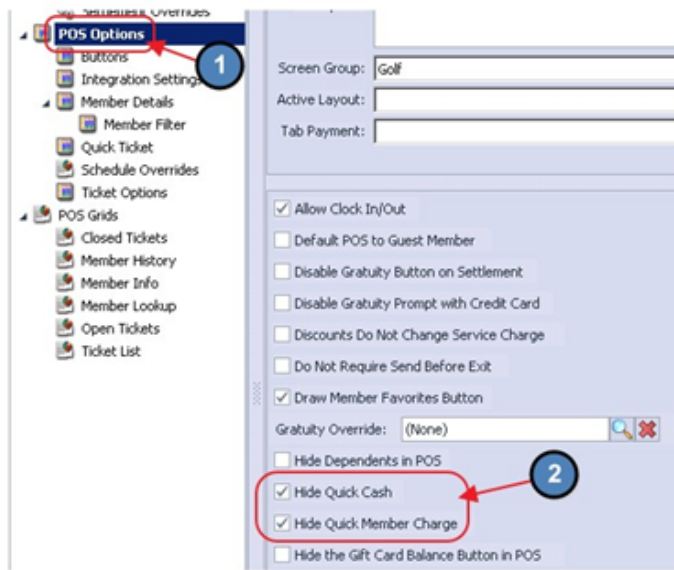
- Quick Cash will not give you the option to key in the amount of money for change back; it will close the ticket for the exact amount owing.
- Quick Settlement is a one step process and will not give you any other options in closing the ticket like adding additional gratuity or split tender. For more closing capabilities select **Close Ticket** instead.
- A Settlement Ticket is similar to the pay receipt except it includes the settlement details on the printed ticket.
- You have the option to hide the Quick Settlement Types from the POS by Area, or to suppress printing a settlement ticket by POS Terminal.

To hide the Quick Settlements Types from the POS by **Area**,

- 1) In CMA, please navigate to **System** across the top toolbar and choose **Areas**.

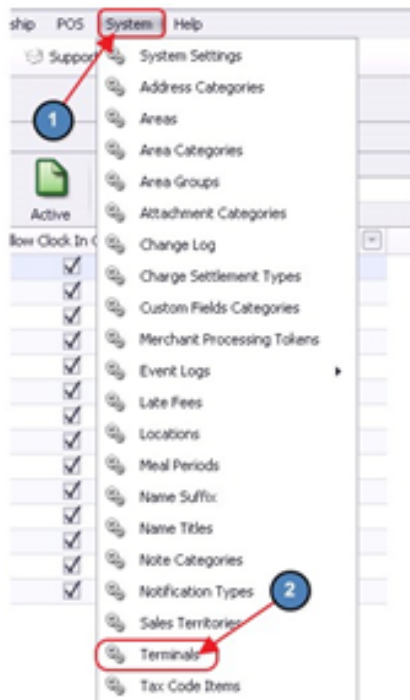


- 2) Double click on the Area in question and navigate to the **POS Options** tab on the left pane. Once on the **POS Options** tab, select the **Hide Quick Cash/ Quick Member Charge** check box. This will remove the Quick Settlements from the Area specified.

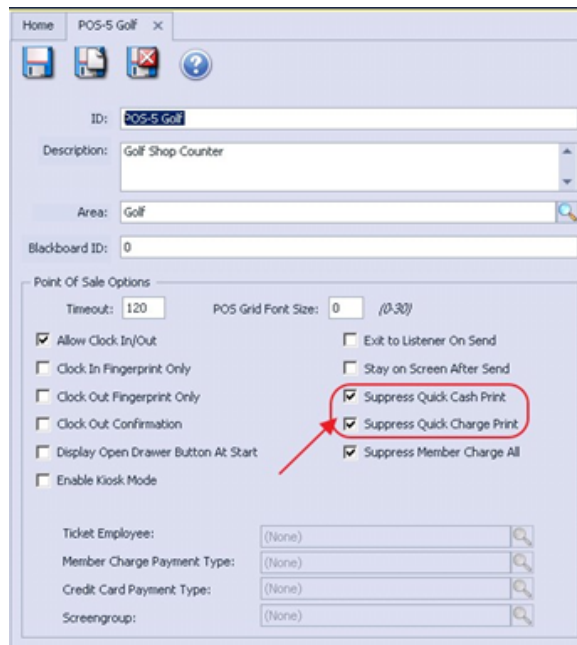


To suppress printing a settlement ticket by POS Terminal,

- 1) In CMA, please navigate to **System** across the top toolbar and select **Terminals**.

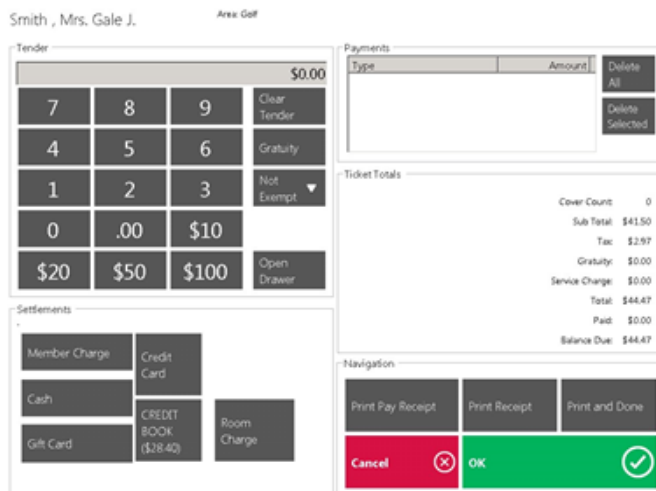


- 2) Double click on the **Terminal** in question, and put a check mark on **Suppress Quick Cash Print or Charge**. This will prevent a settle ticket from printing when the Quick Settlements are selected.



## Close Ticket

The **Close Ticket** function gives you additional options on how the ticket is settled. In this section we will cover the various options available.



## Tender Keypad

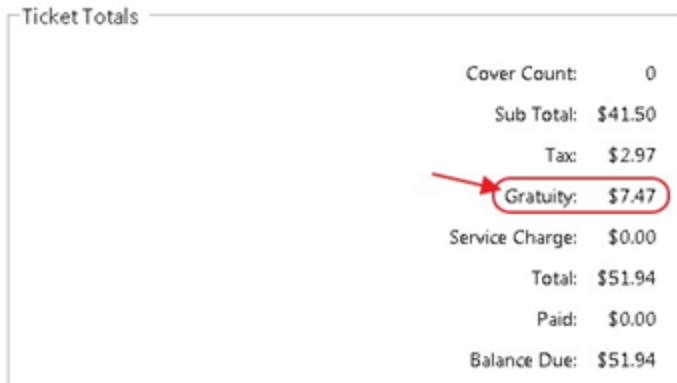
Top left corner of the screen is the **Tender keypad**.

- 1) **Gratuity** - Select the **Gratuity** button and you will get the **Gratuity Prompt**. Enter the Gratuity amount (or percentage as applicable) and click **OK**.

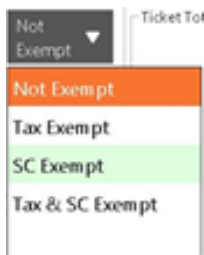
**Note:** Select **Clear** on the Gratuity Prompt to clear any wrongly entered Gratuity.



You will see the added gratuity in the **Ticket Totals** section.



- 2) **Tax/Service Charge Exempt** - Select drop down arrow next to **Not Exempt** and a list of exemptible features will display. Select the option relevant to the current charge (requires security rights).

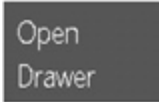


Options Include:

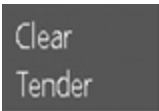
- Not Exempt
- Tax Exempt

- Service Charge (SC) Exempt
- Tax & Service Charge (SC) Exempt

3) **Open Cash Drawer** will open the cash drawer before completing the settlement.



4) **Clear Tender** will clear the amount entered to re-enter a new amount.

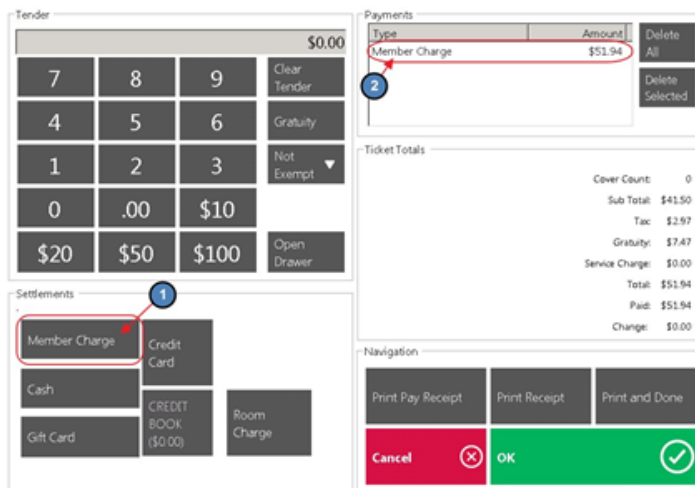


5) The pre-fixed values \$10, \$20, \$50, \$100 are applied to **Cash** settlement **ONLY**.



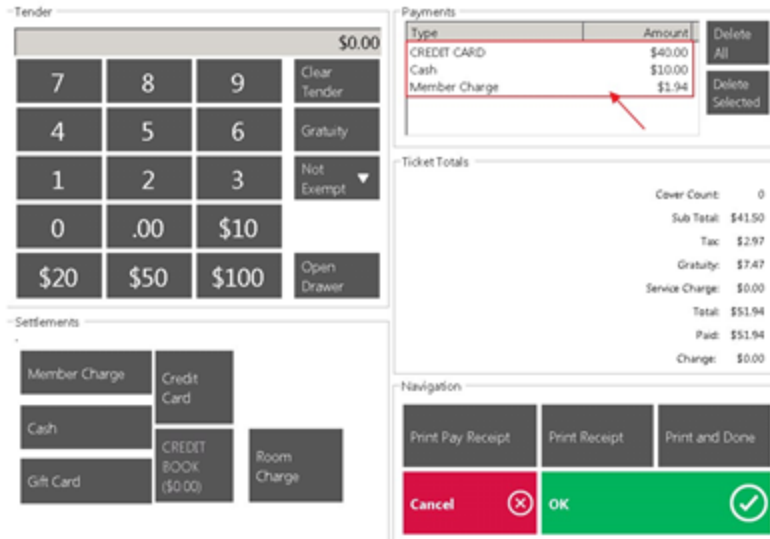
### Settlements - Settle Ticket

1) **Single Settlement Type Used** - If you want to settle the full amount to one settlement type **do not** enter the amount: simply select the Settlement Type and the full amount will be applied.



2) **Split Settlement** - Is used when the client wants to use more than one settlement type to pay the amount. For example 10 dollars to **Cash**, 40 dollars to **Credit Card**, and remaining amount to **Member Charge**. Enter the amount to be charged

on the Cash settlement type in the Tender keypad and select the Cash settlement type, do the same for the Credit Card settlement type, and then select the Member Charge settlement type and the remaining amount on the ticket will be applied to Member Charge.



**Note:** The amount to split must be entered into the Tender keypad first before selecting the settlement type.



- **Delete All** - will remove all settlements entered to start over.
- **Delete Selected** - highlight the settlement type you want removed and select **Delete Selected**.

Type	Amount
CREDIT CARD	\$26.94
Cash	\$15.00
Member Charge	\$10.00

Delete All

---

Delete Selected

## Exit

Will exit the POS screen back to the main screen.

In the POS ordering screen, select **Exit** when you want to leave the POS screen.



### Notes:

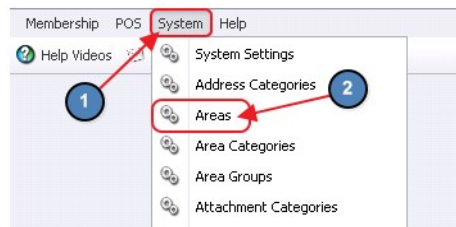
- Depending on your setup, you may not be able to exit the POS screen if you have unsent orders; if you have this type of setup you are required to hit **Send** to exit the POS screen.
- You can tell if all orders have been sent, by looking at their text color. If the order has been sent, they will be listed in **Red**. Items that have not been sent will be listed in **Black**.

So the rule is:

- If there are **any** items listed in **Black** hit **Send**.
- If **all** items are listed in **Red** hit **Exit**.

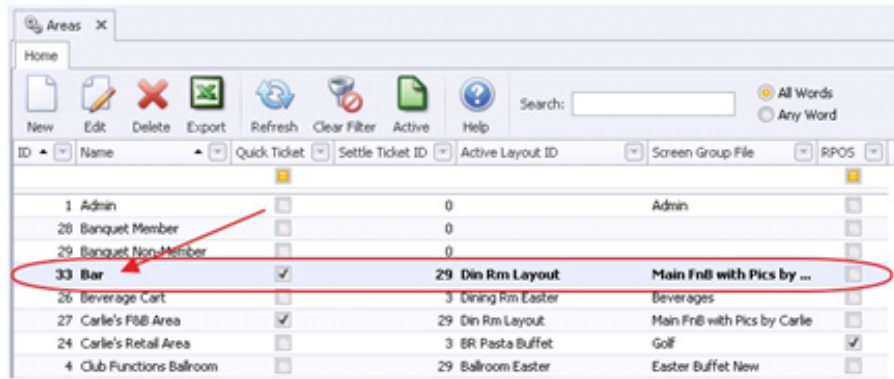
To turn off the Send before Exit feature:

- 1) Navigate to **System** across the top toolbar and select **Areas**.



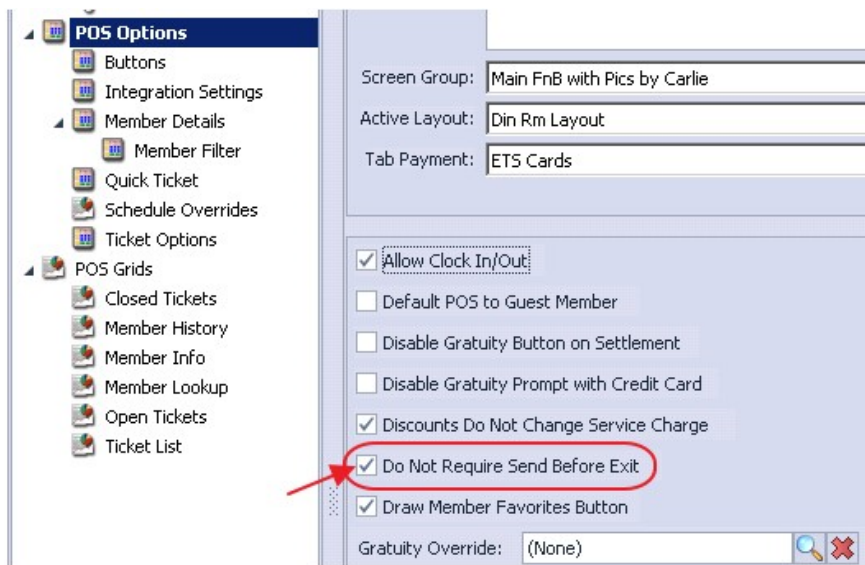
- 2) Select the applicable Area.





ID	Name	Quick Ticket	Settle Ticket ID	Active Layout ID	Screen Group File	RPOS
1	Admin	<input type="checkbox"/>	0		Admin	<input type="checkbox"/>
28	Banquet Member	<input type="checkbox"/>	0			<input type="checkbox"/>
29	Banquet Non-Member	<input type="checkbox"/>	0			<input type="checkbox"/>
33	Bar	<input checked="" type="checkbox"/>	29	Din Rm Layout	Main FnB with Pics by ...	<input type="checkbox"/>
26	Beverage Cart	<input type="checkbox"/>	3	Dining Rm Easter	Beverages	<input type="checkbox"/>
27	Carlie's F&B Area	<input checked="" type="checkbox"/>	29	Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>
24	Carlie's Retail Area	<input type="checkbox"/>	3	BR Pasta Buffet	Golf	<input checked="" type="checkbox"/>
4	Club Functions Ballroom	<input type="checkbox"/>	29	Ballroom Easter	Easter Buffet New	<input type="checkbox"/>

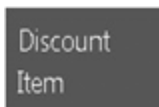
3) Navigate to the POS Options tab and select **Do Not Require Send Before Exit**.



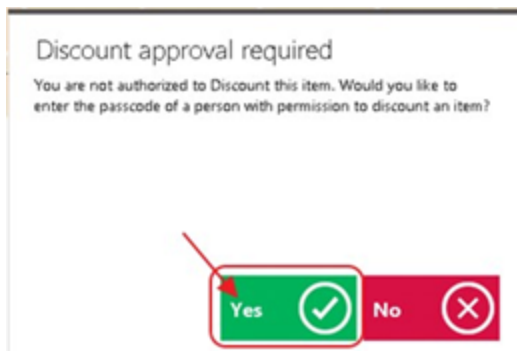
## Discount Item

Gives users the ability to discount an item. Requires security rights.

1) Highlight the item to discount and click **Discount Item**.



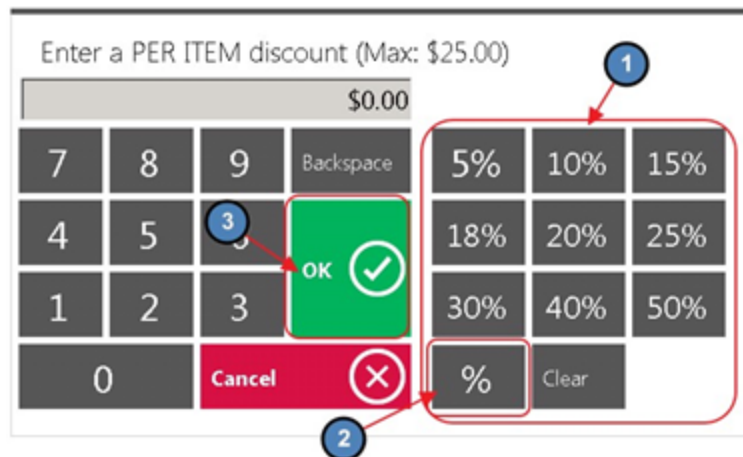
2) A message box will pop up if you do not have security rights to Discount. You will need to get a manager to continue. Select **YES** and **Enter Pass Code**.



- 3) Select a **Discount reason** or key in a reason. **Discount reasons** are optional, if you do not get this prompt then you are not setup to track reasons. For more information on setting up **Discount reasons**, please refer to the **Buttons** section of our **F&B Areas** manual.



- 4) Enter the Discount (on the right side are pre-set percentages, if none of these are what you want click on the % sign to manually enter the desired percentage). If it is a flat dollar discount amount, then use the numbers on the left of the screen. Click **OK** when finished.

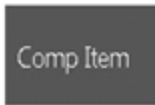


**Note:** If you have more than one item to delete follow the [Multi-Select \(On\)](#) instructions.

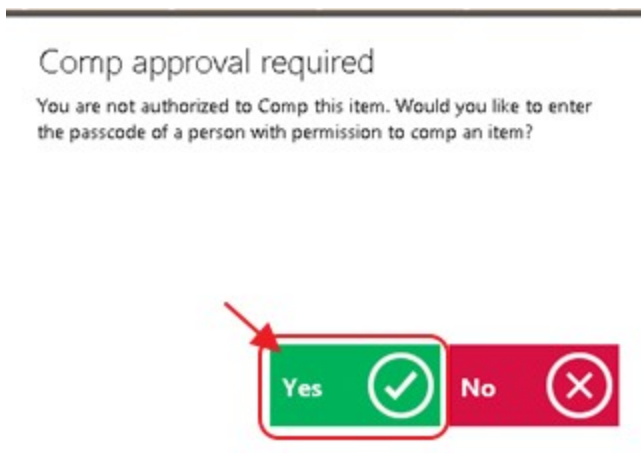
## Comp Item

Give users the ability to comp an item. Requires security rights.

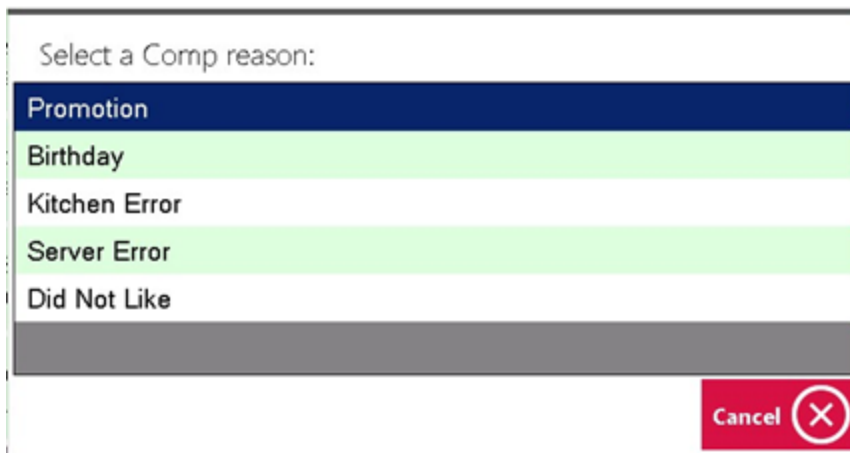
- 1) Highlight the item to comp and click **Comp Item**, the system will discount the item 100%.



- 2) A message box will pop up if you do not have security rights to comp. You will need to get a manager to continue. Select **YES** and **Enter Pass Code**.



- 3) Select a **Comp reason** or key in a reason. **Comp reasons** are optional, if you do not get this prompt then you are not setup to track reasons. For more information on setting up Comp reasons, please refer to the **Buttons** section of our **F&B Areas** manual.



**Note:** If you have more than one item to delete follow the [Multi-Select \(On\)](#) instructions.

## Multi Select (Off)/(On)

Used in conjunction with Delete Item, Void Item, Discount Item, and Comp Item; when (ON), users can select multiple Items.

- 1) Click or touch **Multi-Select (Off)** and it will change to **Multi-Select (On)**.

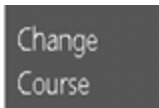


- 2) Highlight all the items by touching or clicking the Item. Select one of the functions below and follow their respective instructions (These are the only functions that can be used in combination with Multi (On)).
  - a) [Delete Item](#)
  - b) [Void Item](#)
  - c) [Discount Item](#)
  - d) [Comp Item](#)

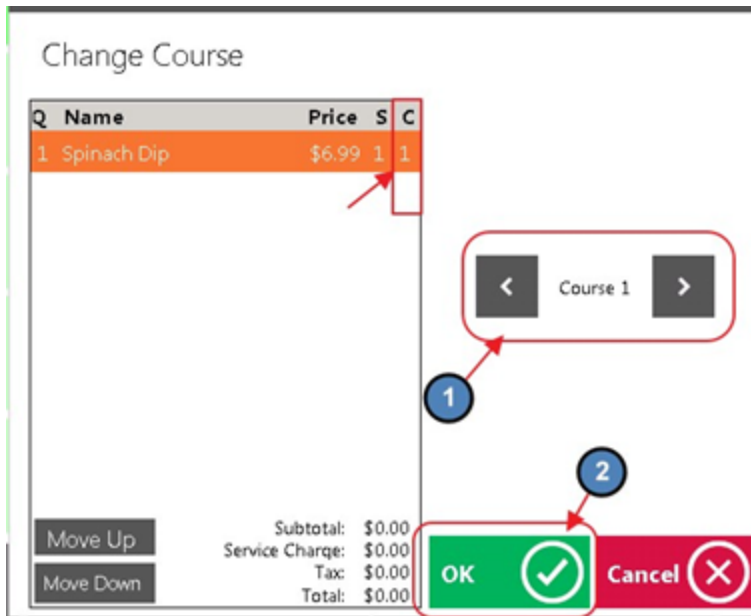
## Change Course

If using coursing, user can use this feature to change the default course for an item. For example, if an Item was set up as an appetizer but the member wants it as an entrée, you can change the course to properly group on the prep ticket using this feature.

- 1) Enter an Item and while the Item is highlighted click on **Change Course**.



- 2) Using the < > arrows, change the course. Click **OK** when done.



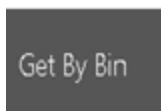
**Notes:**

- **Item Categories** and individual **Items** can be set up with a default course number and changed at any time before using this function.
- The system will automatically draw a line divider between courses on the Send Ticket.
- There are a few setting that need to be turned on for coursing to work. Please see our **Coursing** manual for more instructions.

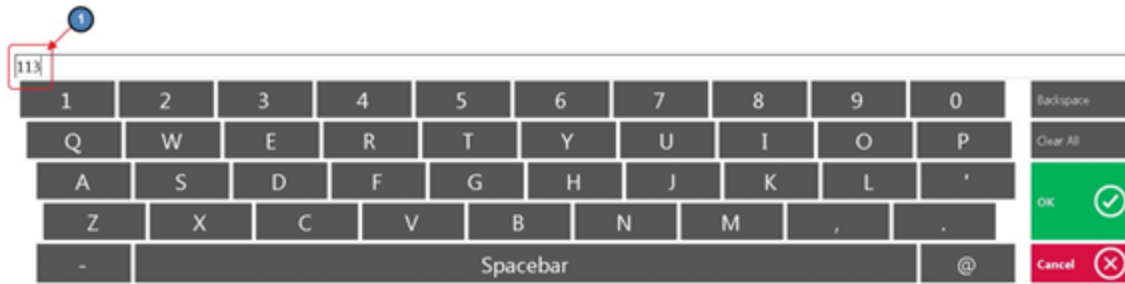
**Get By Bin**

Used to lookup Wine bottles by Bin Number.

- 1) Click **Get By Bin**.



- 2) Use the search bar to narrow down your search. Click or touch the Item to select.



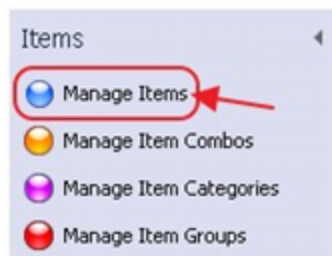
3) The Item will then populate on the ticket.

Q	Name	Price	S	C
1	Spinach Dip	\$6.99	1	1
1	8 oz Beef Tenderloin	\$35.95	1	3
	-ONIONS	\$1.00		3
	-GARLIC MASHED POTATOES			3
1	Btl Philip Shaw #19 Sauv Blanc	\$30.00	2	0
	-1 GLASS			0

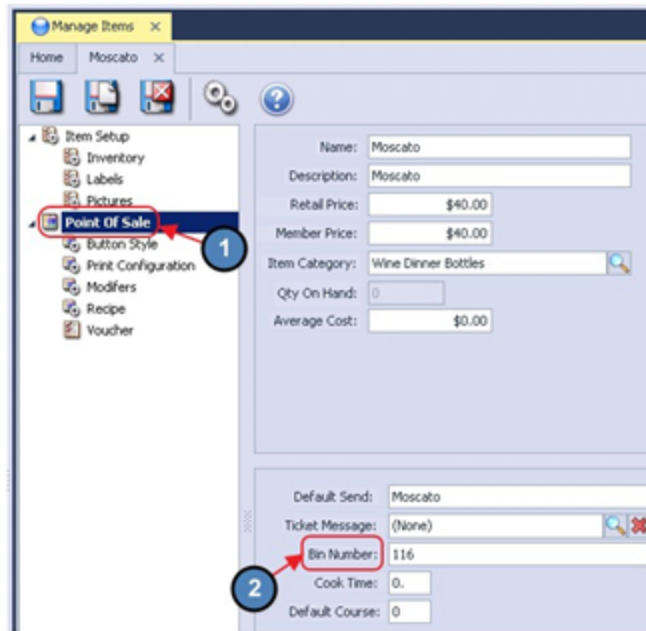
**Note:** Bin Numbers are applied at the Item level.

To enter a Bin Number:

- 1) Navigate to the **Items** module and select **Manage Items**.



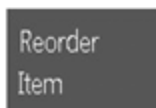
- 2) Select the Item in question and Navigate to the **Point of Sale** tab. Enter the appropriate number in the Bin Number field.



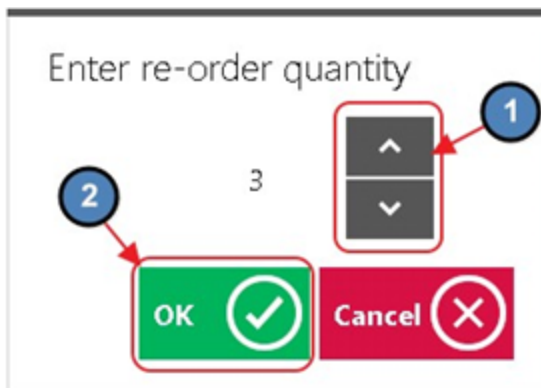
## Reorder Item

Used in conjunction with Multi Select (On) to reorder items already 'Sent'.

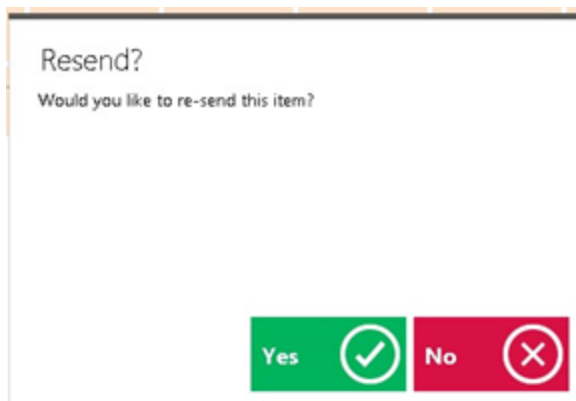
- 1) Highlight the Item to reorder and click on **Reorder Item**.



- 2) Enter the QTY to reorder and click **OK**.



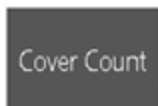
- 3) At the next prompt, enter **Yes** if you want the order to be sent to the remote printer, **No** if you want the Item added to the ticket but not sent to the remote printer.



## Cover Count

Used to change the cover count at any time.

- 1) Open the applicable ticket and click **Cover Count**. Enter the number of covers.



- 2) Enter the correct number of covers.

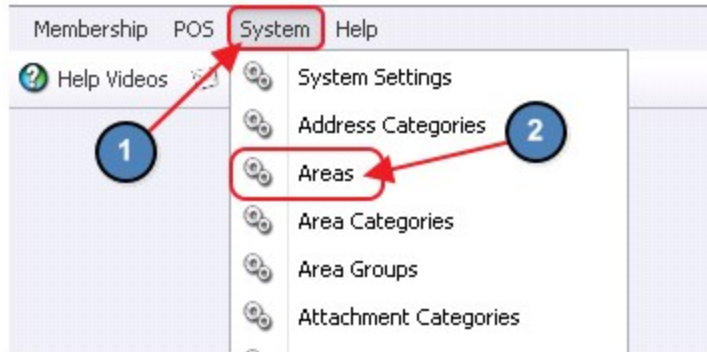




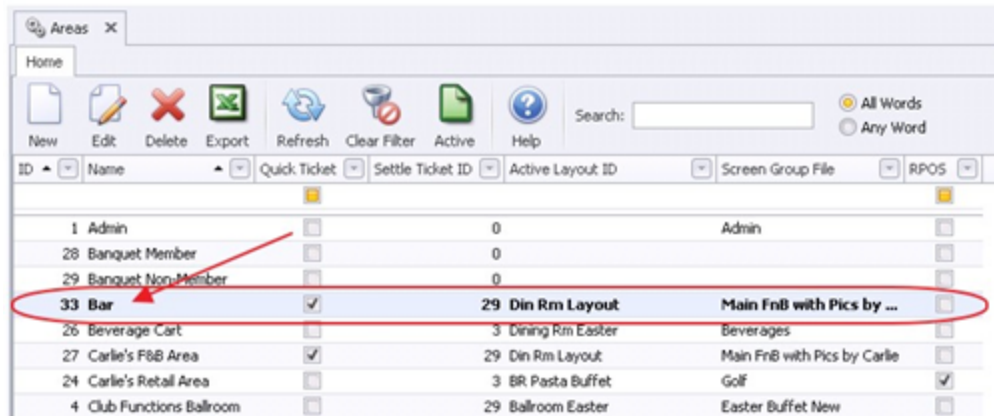
**Note:** You have 3 options when you want the system to prompt for covers; the options can be changed at any time in CMA.

To access these options:

- 1) Navigate to **System** across the top toolbar and select **Areas**.

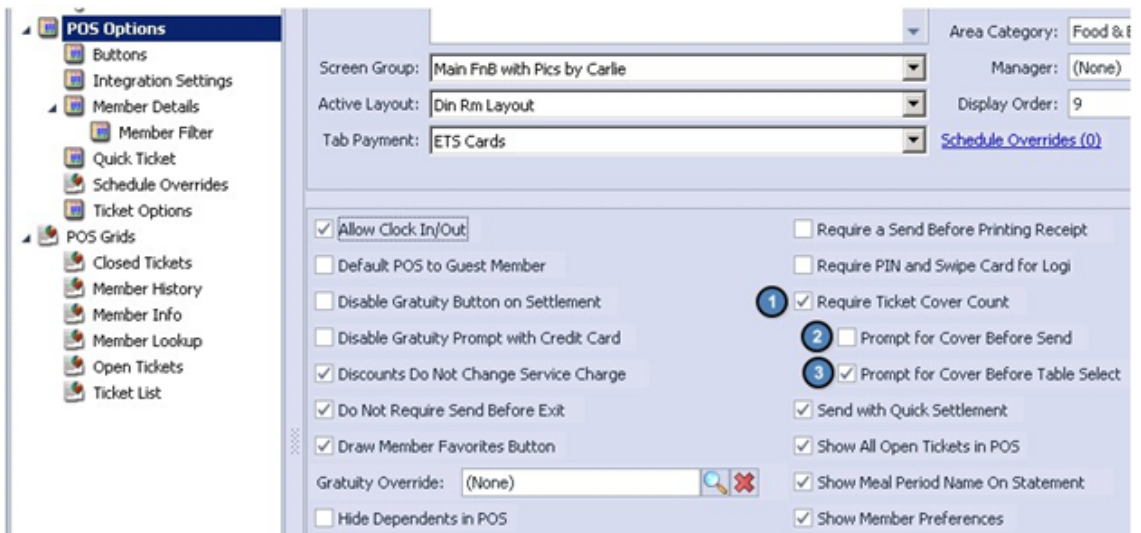


- 2) Select the applicable Area.



- 3) Navigate to the **POS Options tab** and put a check on **Require Ticket Cover Count**.

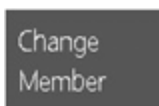
- a) To be prompted at the beginning of opening the ticket, check **Prompt for Cover Before Table Select**.
- b) To be prompted the first time you send the order, check **Prompt for Cover Before Send**.
- c) If **Require Ticket Cover Count** is checked and neither of the above options are selected, the system will prompt at the time of closing the ticket.



## Change Member

Used if the member to be billed needs to change for any reason.

- 1) Click on **Change Member**.



- 2) Search by name or member number, Highlight the member and click OK, or double click the member.

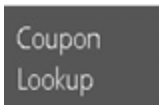


## Coupon Lookup

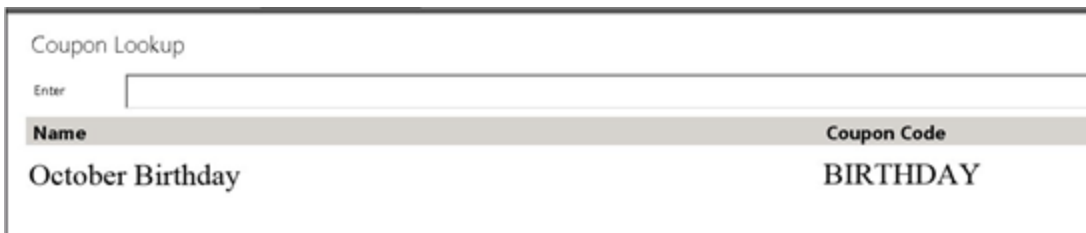
The Coupon Lookup works in conjunction with Member Marketing and Item Price Scheduling.

Please see our **Coupons** manual for more information on their setup.

- 1) Place the order, and click on **Coupon Lookup**.



- 2) The screen will display all available coupons for redemption. Touch or click the one you want.



### Note:

- If the member does not have any active coupons the button will be grayed out.
- If a coupon has been applied to an item and you wish to remove the discount, click or touch the **Remove Coupon** button.

## Print Ticket

Print Ticket is used when you want to print a receipt before closing a ticket. This will print out the **Pay Ticket** when selected. Most often used to acquire a signature prior to closing the ticket.

- 1) In POS ordering screen, select **Print Ticket** to print out the Pay Ticket.



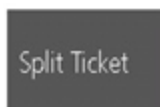
- 2) Select **Exit** when finished.

**Notes:**

- Use **Print Ticket** to give the customer information on the charges and to get a signature before closing the ticket.
- The **Pay Receipt** can be modified to display discounts, service charge, additional tip, and taxes in a few different formats.
- You also have the option to have messages, minimum balances, store credit balances, and other information included on the pay receipt.
- See [Print Preview](#) as an alternative to Printing directly.

## Split Ticket

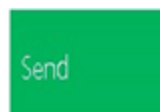
Used if more than one ticket is required on a transaction and to edit separate tickets.



Please see our **Split Ticket manual** for a demonstration of all the ways to split an item or ticket.

## Send

In the POS ordering screen when ready to send items to their designated remote printers, select **Send**.



**Notes:**

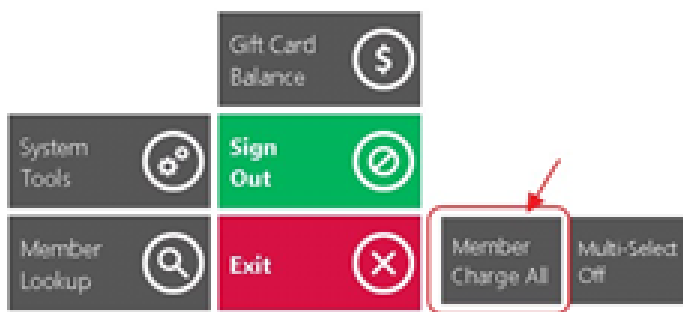
- **Item Categories** determine what printer the Item will go to, it can be overwritten on the Item level. Please see our **Items** manual for more information on Item Categories and how to set up their Print Configuration.
- If the item is not set up to print anywhere, the **Send** button will exit you out of POS ordering screen.

- You can tell if an Item has been sent, by looking at its text color. If the order has been sent, it will be listed in **Red**. Items that have not been sent will be listed in **Black**.

## Other Button Functionality

### Member Charge All

Another feature is the **Member Charge All** button. This button will take all open tickets and close them to **Member Charge** without going through the payment screen.



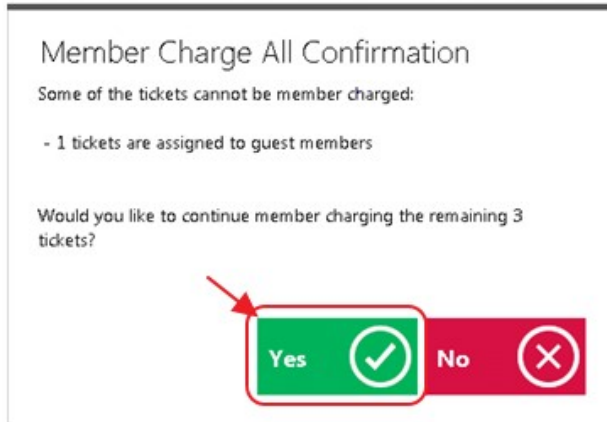
In this example, there are 4 open tickets (3 members and 1 guest).

Tickets	Labor	Specials	Contest	Messages	Events
ID	Full Name	Area	Table	Ticket #	Server Name
174C	Aguirre, Collette	Carlie's F&B Area	6 - 1	125486	Administrative User
749C	Ackerman, Ron	Carlie's F&B Area	7 - 1	125487	Administrative User
1000B	Abbott, Ben M.	Carlie's F&B Area	10 - 1	125488	Administrative User
001	Guest	Carlie's F&B Area	11 - 1	125490	Administrative User

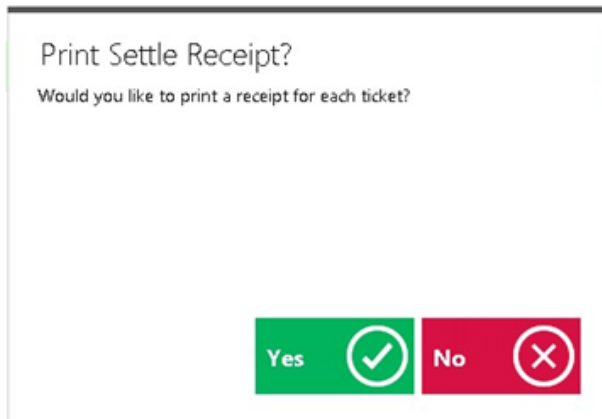
Click the **"Member Charge All,"** button.



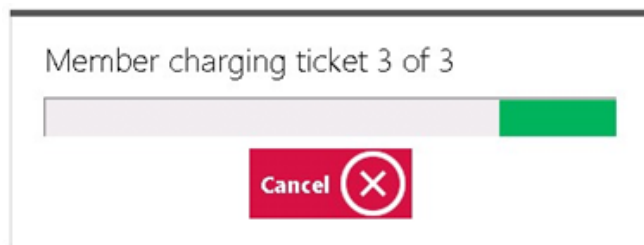
Upon clicking the button, a prompt will display telling the user that one ticket is assigned to guest members and cannot be member charged. The 3 remaining open tickets assigned to **members** however, will be settled to **Member Charge**. Select **Yes**.



Option will exist to Print a receipt.

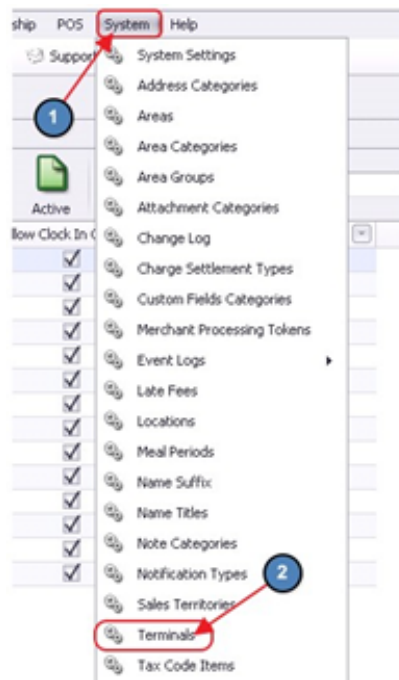


Member charge will commence.

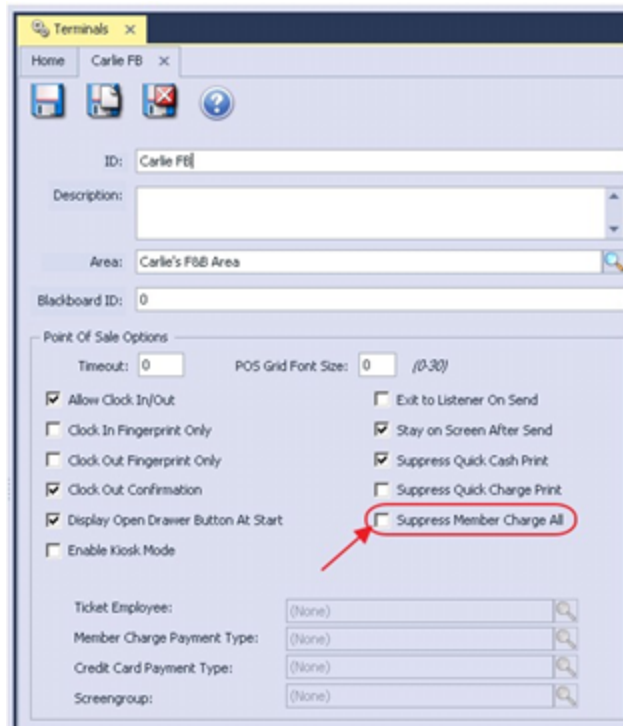


**Note:** Member Charge All can be turned off at the Terminal level if desired. To do so:

- 1) In CMA navigate to **System** across the top toolbar and select **Terminals**.



2) Double click the applicable Terminal and select **Suppress Member Charge All**.

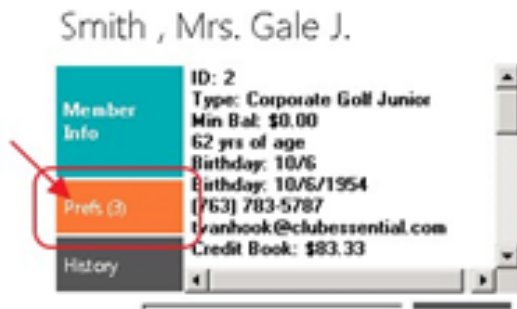


## Member Preferences

**Member Preferences** and other information about the member can be manually entered in POS. Food and Beverage In/Out uses this feature most often to input information such as preferred tables, foods, drinks, allergies, etc. If member preferences have been added,

the button will turn **green** to alert the user there is information about the member. This information can also be printed to the receipt printer.

To view preferences, in the top left corner of the POS Screen, select **Prefs.**

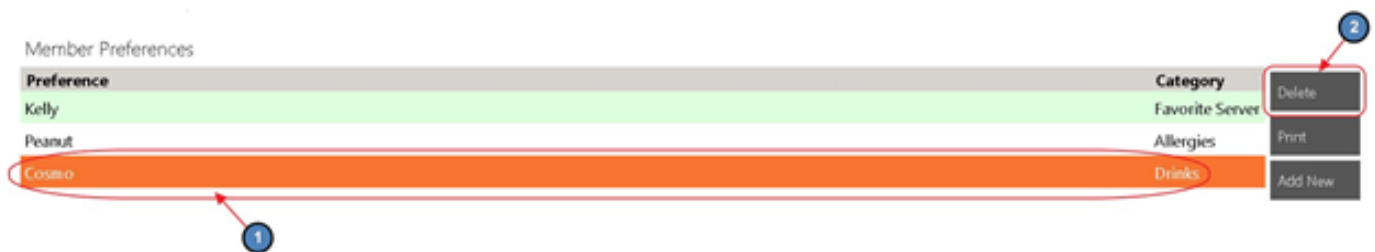


Member Preferences

Preference	Category	
Kelly	Favorite Server	Delete
Peanut	Allergies	Print
Cosmo	Drinks	Add New

### Delete a Preference

To delete a preference, highlight the Preference line, select **Delete**.



### Add New Preference

To add a new preference, select **Add New**, highlight the Category of preference, in the **Enter Preference** box enter the description of the new preference, select **OK**.



Member Preferences

Preference	Category	
Kelly	Favorite Server	Delete
Peanut	Allergies	Print
Cosmo	Drinks	Add New



Add Preference

Category

Delete	Name	
	Allergies	↑
	Favorite Server	↑
	Wine bythe bottle	↓
	drink	↓

Enter Preference

Onions

1	2	3	4	5	6	7	8	9	0	Backspace
Q	W	E	R	T	Y	U	I	O	P	Clear All
A	S	D	F	G	H	J	K	L	'	OK
Z	X	C	V	B	N	M	,	.		Cancel
Spacebar										@

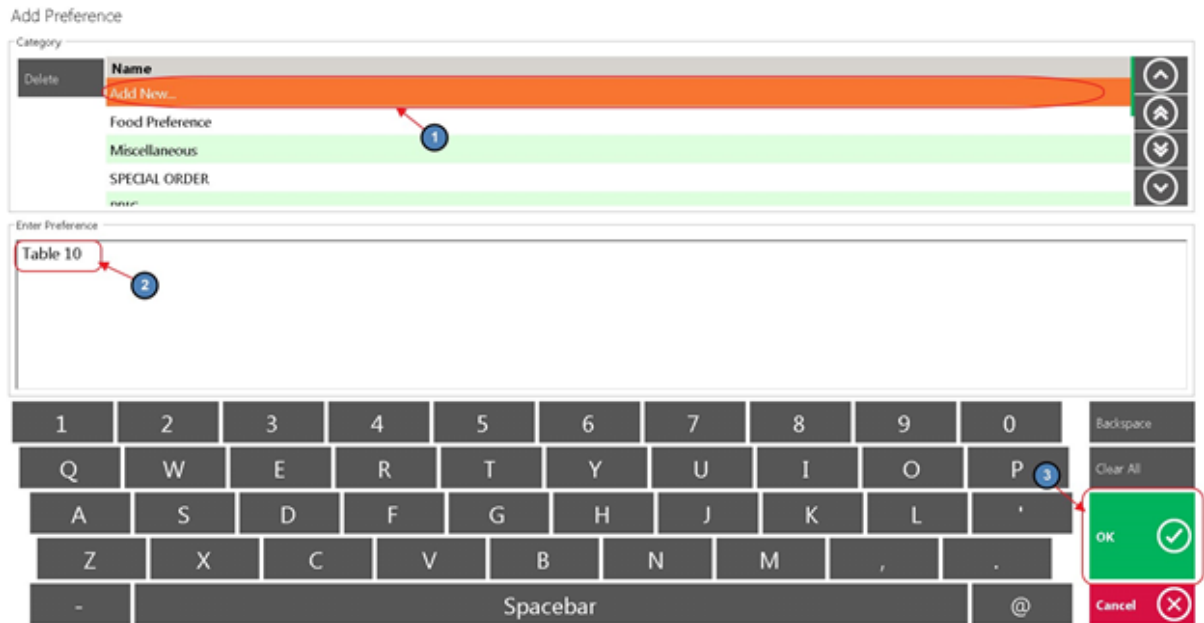
**Change Preference**

To change a preference, the user must delete the preference that needs changed and add the new preference from scratch.

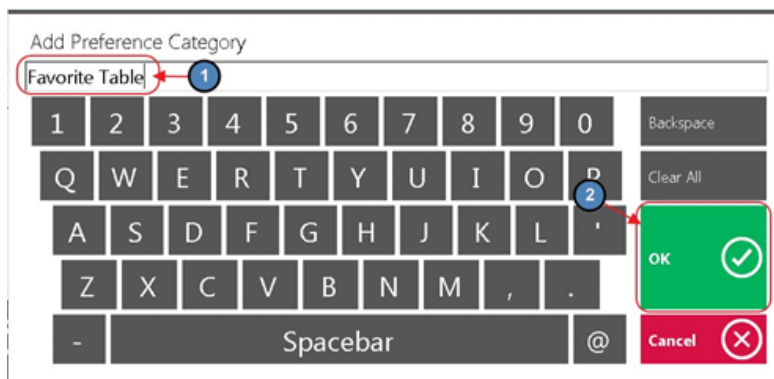
**Preference Categories**

## Add New Preference Category

- 1) To add a new Preference Category, in the **Select Category** box highlight the **Add New** line. Then, in the **Enter Preference** box, enter the description of the new preference (**not the new category name**), Select **OK**.



- 2) The **Add Preference Category** box will appear, enter the new **Category** name, and select **OK** when finished.



## Member History

**Member History** will list the member's previously purchased Items.

To access Member History, select **History** in the top left corner of the POS Screen.

Smith, Mrs. Gale J.

**Member Info**  
 ID: 2  
 Type: Corporate Golf Junior  
 Min Bal: \$0.00  
 62 yrs of age  
 Birthday: 10/6  
**Prefs (5)**  
 (763) 783-5787  
 tyanhook@clubessential.com  
**History**  
 Credit Book: \$83.33



Member History

Ticket	Date Sold	Sales Item	SKU	Sales Price	Sold By	View Ticket
125120	7/18/2016	Associate Round	100012493	\$1.07	Administrative User	View Ticket
124671	1/28/2016	Golf Events	301	\$21.45	Administrative User	View Ticket
124671	1/28/2016	Men's Die Hard Credit Offset	100012613	(\$21.45)	Administrative User	View Ticket
124670	1/28/2016	Men's Die Hard Voucher Package	100012612	\$150.15	Administrative User	View Ticket
124538	11/17/2015	Gift Cert Issued	391	\$50.00	Jim Gamble	View Ticket
124538	11/17/2015	ProV1xy Sleeve	100012562	\$19.28	Jim Gamble	View Ticket
124538	11/17/2015	Titleist Pro V 1 Sleeve	100011060	\$12.05	Jim Gamble	View Ticket
124354	11/7/2014	18 Hole Cart	100011030	\$22.52	Administrative User	View Ticket
124354	11/7/2014	18 Hole Cart	100011030	\$22.52	Administrative User	View Ticket
124354	11/7/2014	Family 18	100011036	\$48.26	Administrative User	View Ticket

1	2	3	4	5	6	7	8	9	0
Q	W	E	R	T	Y	U	I	O	P
A	S	D	F	G	H	J	K	L	'
Z	X	C	V	B	N	M	,	.	
-	Spacebar								@

Backspace

Clear All

OK

Cancel

Notes:

- In the **Search box** you can search the name of the item to narrow down the search.

Member History

Ticket	Date Sold	Sales Item	SKU	Sales Price	Sold By	View Ticket
124538	11/17/2015	Titleist Pro V 1 Sleeve	100011060	\$12.05	Jim Gamble	View Ticket

*(Note: In the original image, a red box highlights the 'Titleist Pro V 1 Sleeve' row, and a blue circle with a '2' points to the 'View Ticket' button for that row.)*

1	2	3	4	5	6	7	8	9	0
---	---	---	---	---	---	---	---	---	---

Backspace

*(Note: In the original image, a red box highlights the search input field, and a blue circle with a '1' points to it.)*

- **From and To Dates** - enter the start and end date to narrow down the search.
- **Enable Multi Select** - select more than one ticket to print.
- **Show Dependents** - if selected, the system will display all family member tickets. If unselected, only the tickets rung under the member selected will show.
- **Area** name will be the name of the Area you have the ticket open.
  - The tickets listed will be tickets that were closed in that Area only.
  - To see tickets closed from a different Area, select the **Area** button, select the applicable Area.
  - It is important to remember that if you do not see an Area listed, then the member has **NO** closed tickets in that Area.
- **Member Name and Number** is displayed at top right corner; you can click on the name to search a different member. When you hit cancel it will take you back to the ordering screen and the original member will still be displayed.



- **View Ticket** - ticket detail can be viewed on the right middle of the screen; highlight the item to view ticket details and select **View Ticket**.
  - **Print Settle Receipt** and **Print Pay Receipt**; you can reprint a ticket from history at any time.

Member History

Ticket	Date Sold	Sales Item	SKU	Sales Price	Sold By	View Ticket
125120	7/18/2016	Associate Round			Administrative User	View Ticket
124671	1/28/2016	Golf Events			Administrative User	View Ticket
124671	1/28/2016	Men's Die Hard Credit Offset			Administrative User	View Ticket
124670	1/28/2016	Men's Die Hard Voucher Package			Administrative User	View Ticket
124538	11/17/2015	Gift Cert Issued			Jim Gamble	View Ticket
124538	11/17/2015	ProV1xy Sleeve			Jim Gamble	View Ticket
124538	11/17/2015	Titleist Pro V 1 Sleeve			Jim Gamble	View Ticket
124354	11/7/2014	18 Hole Cart			Administrative User	View Ticket
124354	11/7/2014	18 Hole Cart			Administrative User	View Ticket
124354	11/7/2014	Family 18			Administrative User	View Ticket

**Ticket Preview**

Great Key Club  
 (510) 453-4709  
 www.greatkeyclub.com

Tkt #: 125120    07/18/16 12:50 PM  
 Golf    Staff:Administrative

(2) Smith, Mrs. Gale J.    0.

---

1 Associate Round    \$1.00

Sub Total: \$1.00  
 Gratuity: \$0.00  
 Sales Tax: \$0.07

Total: \$1.07

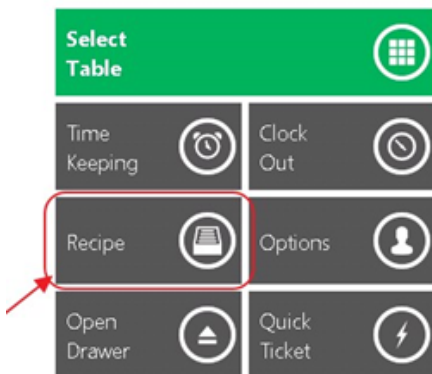
\*\*\*\*\*  
 MEMBER CHARGE: \$1.07  
 \*\*\*\*\*  
 Smith, Mrs. Gale J.    2

Navigation: Print Pay, Print Settle, OK, Backspace, Clear All, OK

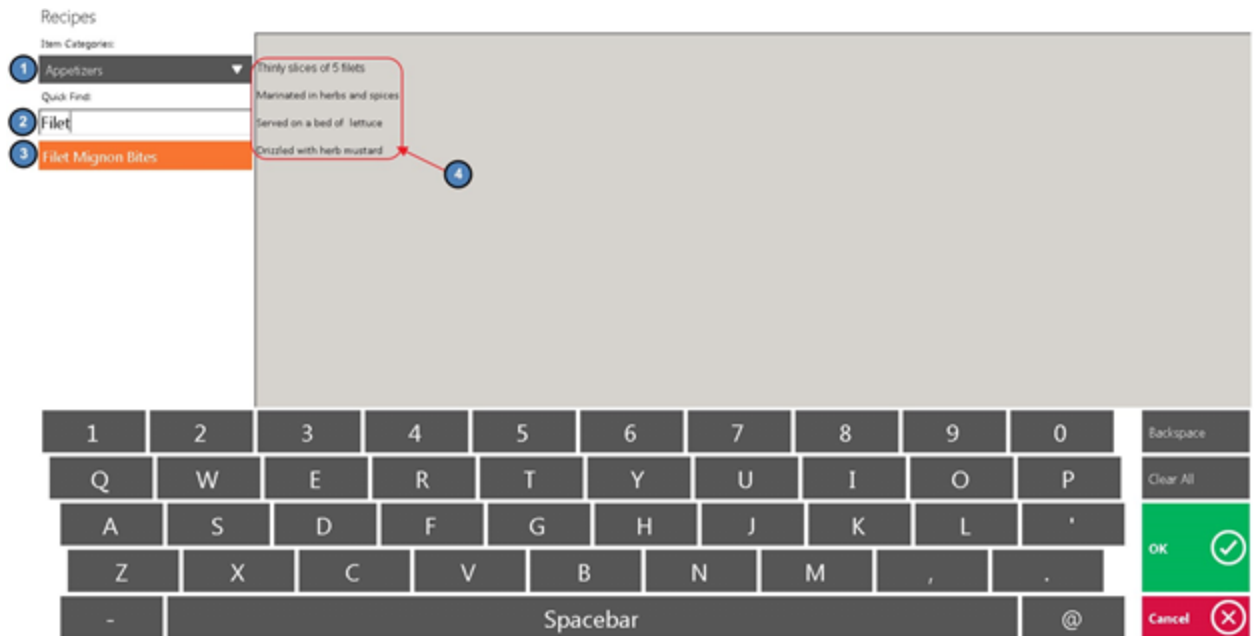
## Recipe

In **Manage Item** maintenance, you can enter the recipe of the Item plate and have it available on the Main POS screen.

- 1) Select **Recipe** from the main POS screen.



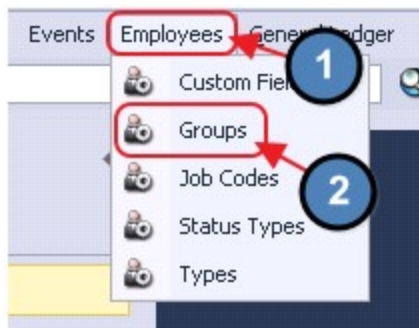
- 2) Click the down arrow and select the **Item Category**. You can search for the name or use the scroll bar to find the Item Highlight the item and the recipe will display to the right of the screen.



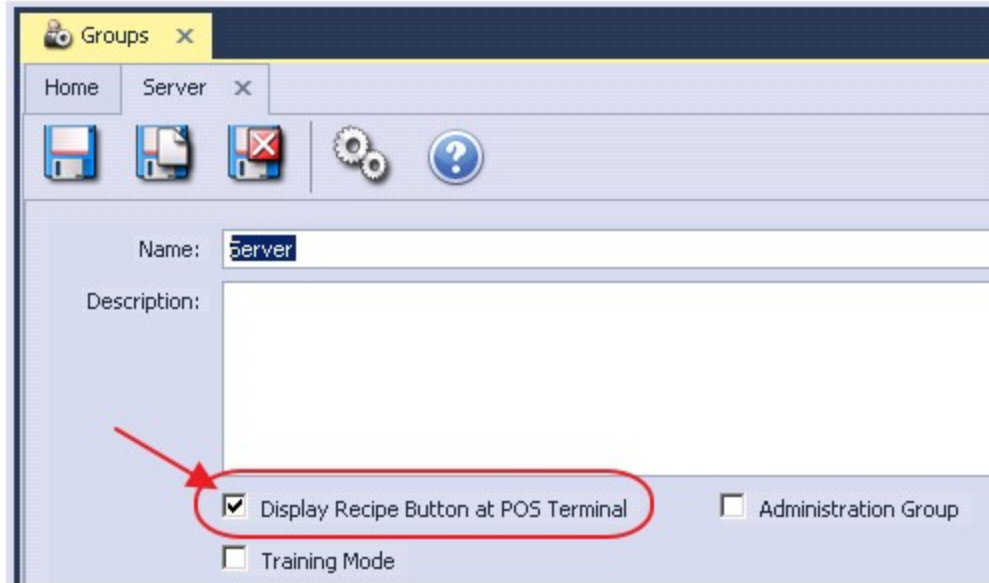
**Note:** Only servers in an Employee Group with the proper security rights will see the Recipe button on the main POS screen.

To turn on this feature:

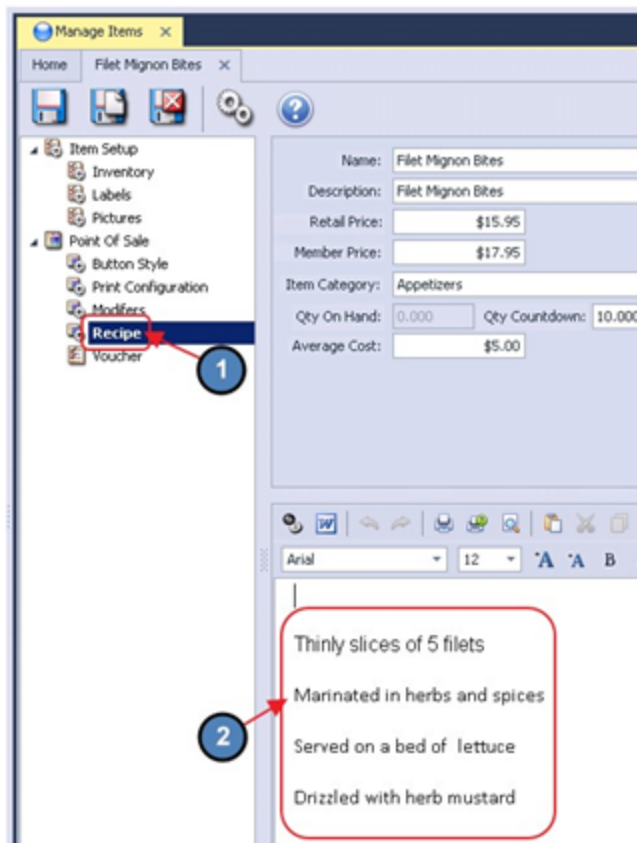
- 1) In CMA, navigate to **Employees** across the top toolbar and select **Groups**.



- 2) Double click on the applicable Group and select **Display Recipe Button at POS Terminal**.



To add a Recipe to an Item, navigate to the applicable Item within Manage Items and select the Recipe tab on the left pane. Enter the appropriate recipe.

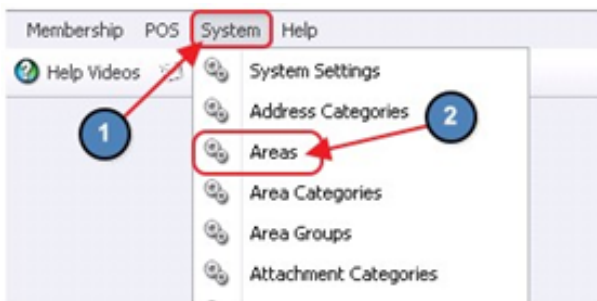


# Print Preview

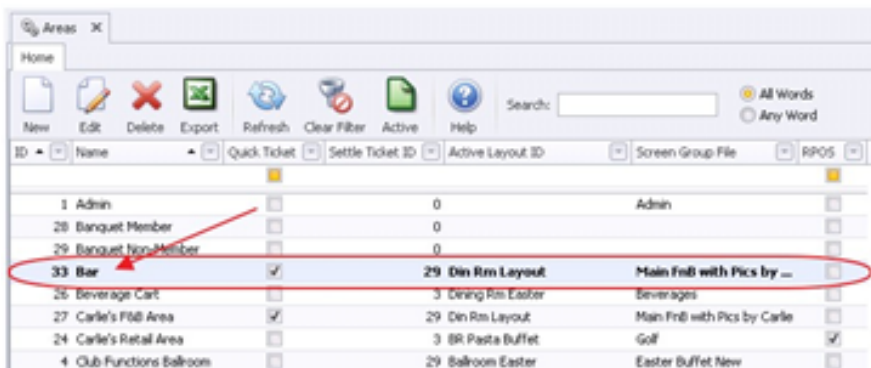
The **Print Preview** feature allows the user to see a Print Preview before any ticket is printed from the POS system. This **Print Preview** will display exactly how the ticket will look when printed and exactly what **Device/Printer** it will print to. Furthermore, the **Pay and Settle ticket Print Preview** will provide the user the option to email a copy of the ticket to the member as long as the member has a valid email address on file.

**Note:** This feature **must** be turned on for each **Area** the user would like the **Print Preview** displayed. To turn on this feature:

- 1) Navigate to **System** across the top toolbar and select **Areas**.

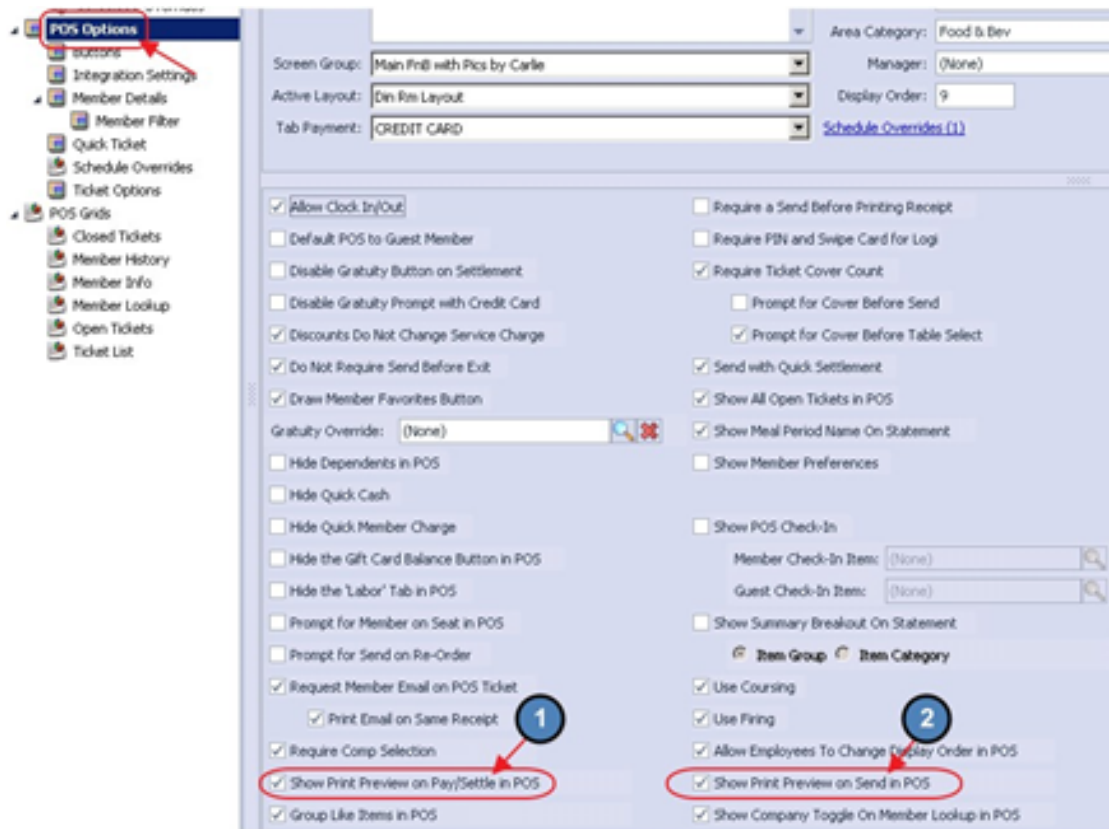


- 2) Select the applicable Area.



- 3) Navigate to the **POS Options** tab and select **Show Print Preview on Pay/Settle in POS** to get the Pay/Settle ticket preview, and **Show Print Preview on Send in POS** to get the Send ticket preview.





## Print Preview Examples

In this section we will provide a few examples of the Print Preview feature.

### Print Preview - Send Ticket

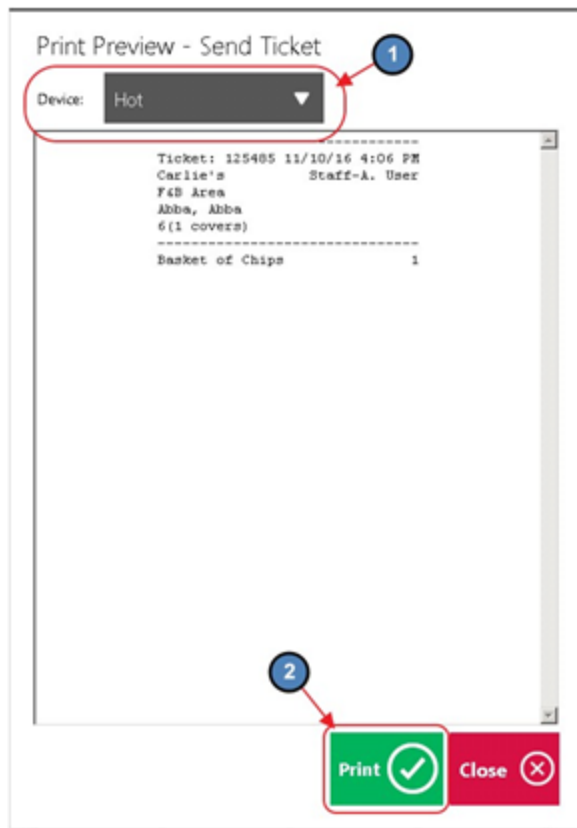
- Select **Send**.



The **Print Preview- Send Ticket** prompt will display. Select **Print**.

- As mentioned earlier, the **Print Preview** will display exactly what device(s) the **Send Ticket** will print to and, exactly how it will look when printed.

- The device(s) listed in the **Device** drop down, are dependent on the **Print Configuration** of the specific **item** selected to send. This is typically configured at the **Item Category** level. Please see our **Items Manual** for more information on Item Categories and their Print Configuration.
- Please be aware, if there are multiple devices listed in the **Device** drop down, this does **NOT** mean the user can select which device they would like the item sent to. This simply tells the user that the item is **configured** to send to **two** separate printers, each time it is sent.

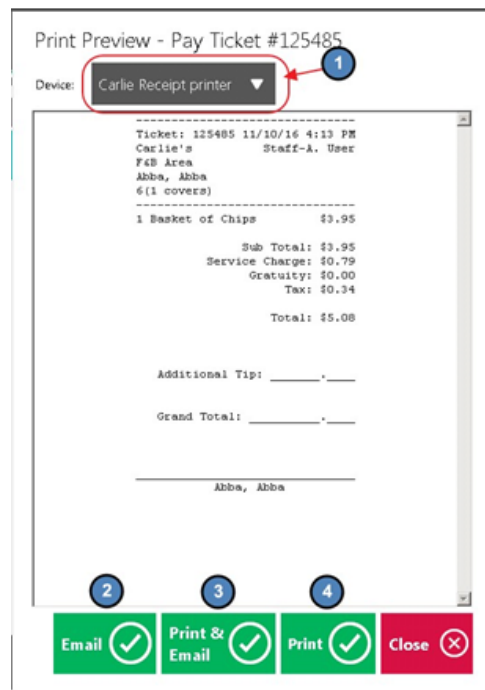


### Print Preview - Pay Ticket

- Select **Print Ticket** or **Print Pay Receipt** from the **Close Ticket** screen.



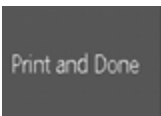
- The **Print Preview - Pay Ticket** prompt will display. Please see below for available options:
  - a) **Email** - Emails a copy of the ticket to the member. Member must have valid email address on file to function properly.
  - b) **Print & Email** - Prints the ticket and emails the member a copy of the ticket.
  - c) **Print** - Prints the ticket.



- Again, the **Print Preview** will display exactly what device the **Pay Ticket** will print - to and, exactly how it will look when printed.
- For **Pay** and **Settle** tickets the **Device** drop down will display only one printer. The printer displayed will depend on the **Receipt Printer** configuration of the specific **POS Device** the ticket is printed from (Please see our **POS Terminal/ Workstation Setup** manual for more information).

### Print Preview - Settle Ticket

- 1) Select **OK** or **Print & Done** when settling a ticket. The Print Preview- Settle Ticket prompt will display> same options as Print Preview- Pay Ticket are available.

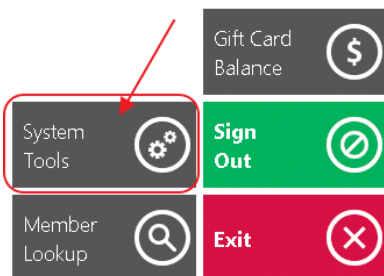


- 2) The **Print Preview - Settle Ticket** prompt will display. Same options as **Print Preview - Pay Ticket** are available.



## System Tools

Please see our **POS System Tools** manual for in-depth information regarding functionality contained within the System Tools button and associated tabs.



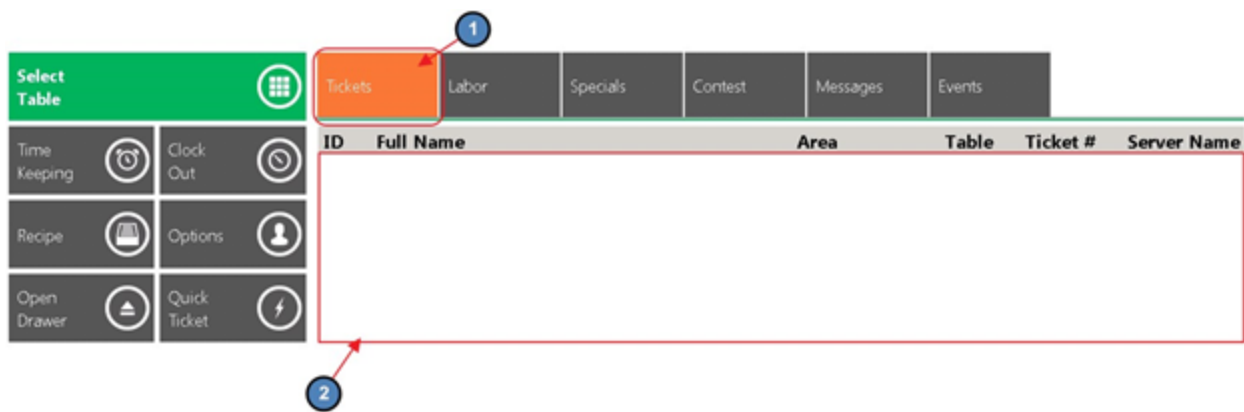
# Employee Time Keeping Actions

## Clocking-Out vs Ending a Shift

**Clocking- Out** and **Ending a Shift** have a few differences in the Office system. Clocking-Out simply stops the system from recording time on the employee’s timesheet. When an employee ends their shift, the system is prompted to stop recording sales under the employee, until the employee clocks back in. It is important to remember that an employee cannot end their shift without clocking out as well. When an employee clocks back in for the first time after their last End of Shift, this is when the employee’s next “Shift” begins. During this time, employees have the ability to Clock-out without ending their shift at any time. This is mostly used to allow employees to clock-out for breaks, lunches, etc. without ending their shift. This keeps reporting and timekeeping clean as the End of Shift Report will display all sales and transactions completed during the employee’s “Shift” regardless of how many times they clocked out during their shift. Furthermore, an employee’s timesheet will reflect all instances of when an employee clocked in and out during their shift.

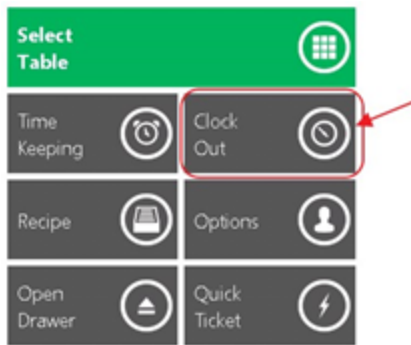
## Clocking-Out for Breaks

As previously mentioned, employees have the ability to clock-out for breaks without ending their shift. However, before an employee can clock-out the **Tickets** screen must be blank reflecting that the employee has no open tickets.

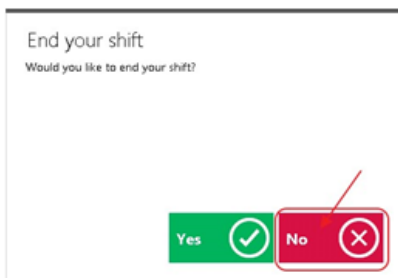


Employees have 2 options when clocking out for breaks.

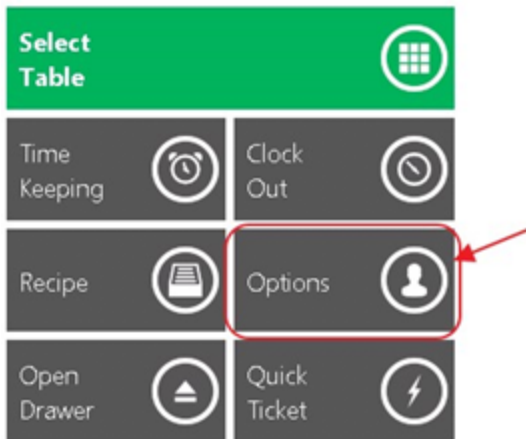
- 1) Select **Clock Out** on the main POS screen.



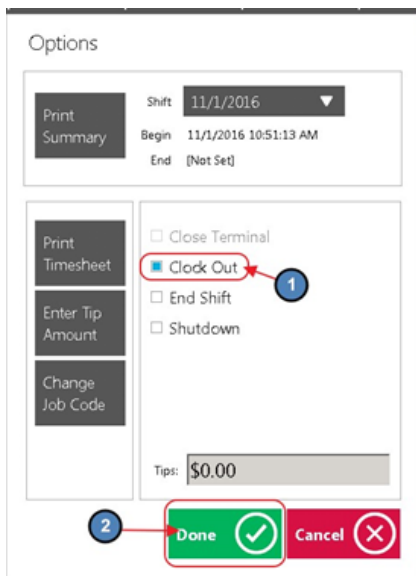
The system will prompt, **Would you like to end your shift?** Select **No**.



- 2) Select **Options** on the main POS screen.



Select **Clock Out** and hit **Done**.



**Notes:**

- Again, either of these options will clock the user out but **NOT** end their shift. Meaning that the employee can clock back in and continue working on the same shift.
- When clocking back in after a break it is important to remember to clock-in under the **SAME** Job Code that started the Shift. For instance, if I began my shift under the Food & Beverage Management Job Code and I clocked out for lunch, when I clock back in I need to select the Food & Beverage Job Code again for timekeeping to report properly.



## End of Shift Processes

Before an employee ends their shift, the **Tickets** screen must be blank reflecting that the employee has no open tickets. Close all tickets before proceeding.

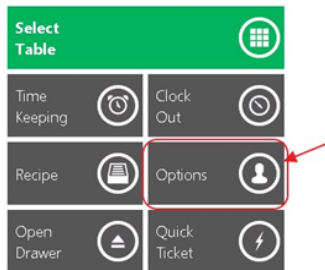


## End of Shift Report

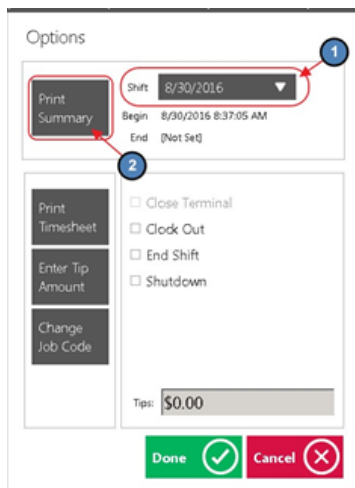
Once the **Tickets** display is blank reflecting no open tickets, an **End of Shift Report** can be printed. This report can be printed as many times as the user wants at any time. In addition, the system also keeps an archive of past End of Shift reports for the user to access and print at any time.

To print an End of Shift Report,

- 1) Select **Options** on the main POS screen.



- 2) Verify that the most current **Shift** is reflected (The system will default to the latest Shift) and select **Print Summary**.

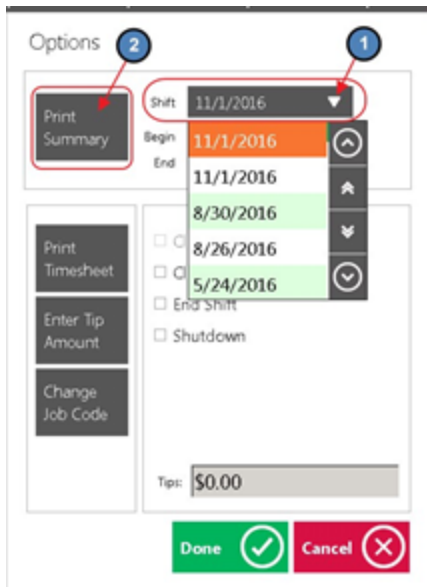




- 3) A **Print Preview** will display showing how the report will look when printed, and the Ticket Device the report will print too. Select **Print** to continue printing.



- 4) As previously mentioned, the system keeps an archive of past End of Shift reports for the user to access and print at any time. To print a past End of Shift Report simply select the appropriate shift in the **Shift** drop down and select **Print Summary**.

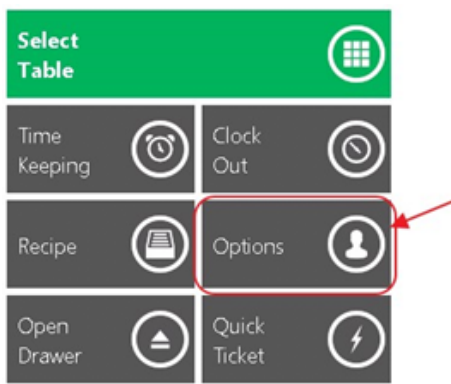


## Ending the Shift

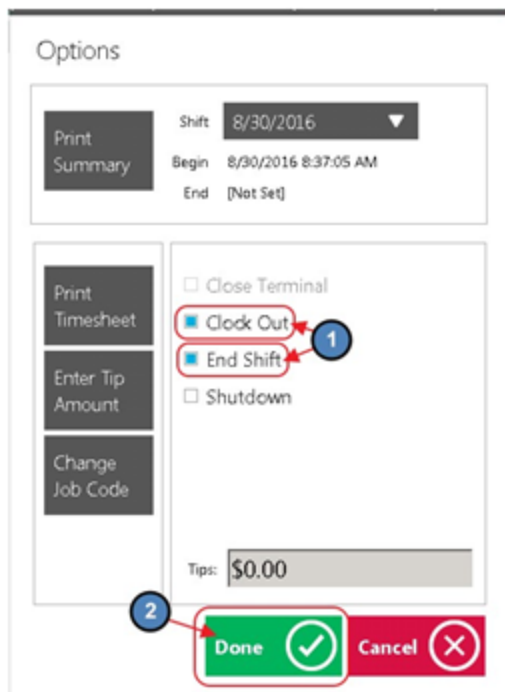
Different operations have different end of shift expectations before an employee can leave; follow the policies and procedures as advised by the club. The Office System requires all tickets to be closed and an **End Shift** completed. This is the preferred method to ending a shift. Again, please note that an employee cannot end their shift without clocking-out as well.

To end a shift,

- 1) Select **Options** on the main POS screen.



- 2) Select the **End Shift** box (**Clock Out** will automatically select itself when **End Shift** is selected). Select **Done**.

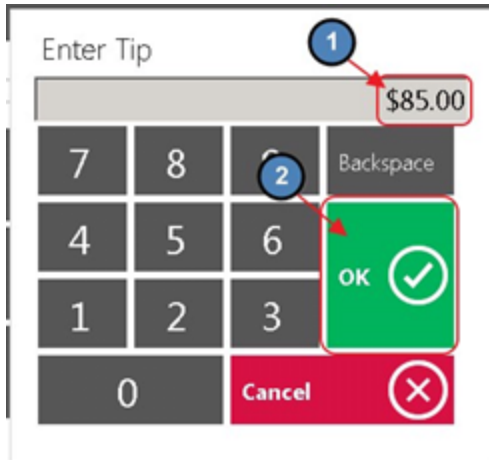


## Options

- 1) **Print Timesheet** - when selected, the system will provide a report on total hours worked during the shift per Job Code. A **Print Preview** will also display when this option is selected. Select **Print** to continue printing the report.

Date	In	Out	Time
Tue 11/01			
	Food & Bev 08:55A		0.70
Total Hrs:			0.70

- 2) **Enter Tip Amount** - if you report cash tips for tax purposes, select this option and a prompt will display for the user to enter their cash tips. Click **OK** when finished.



The tip amount will then display on the main Options screen.



- 3) **Change Job Code**- if you mistakenly logged into the wrong Job Code, select this option and a prompt will display asking the user to select the correct Job Code.

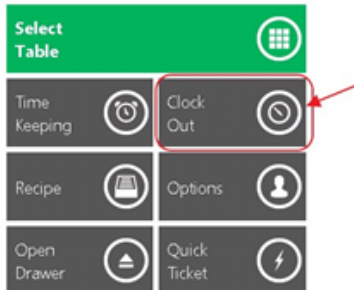


- 4) **Clock Out** - explained in the [Clocking-Out for Breaks](#) section of this document.

- 5) **End Shift** - this is the last step needed before the shift is considered ended. As previously mentioned, **Clock Out** will automatically select itself when **End Shift** is selected.

### Other Ways to End a Shift

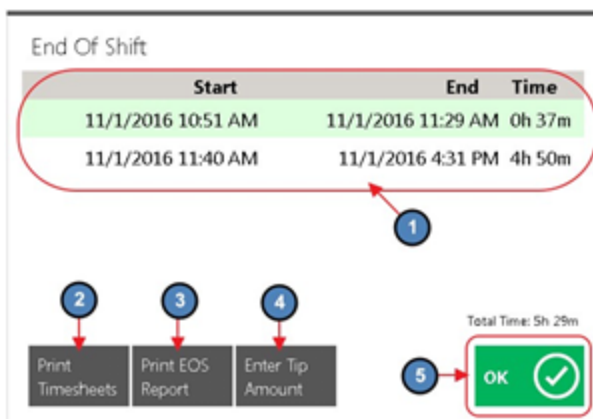
- 1) Select **Clock-Out** on the main POS screen.



- 2) The system will prompt, **Would you like to end your shift?** Select **Yes**.



- 3) **End of Shift Options** will populate.



- a) All instances of clocking in and out during the shift will display.
  - b) **Print Timesheets**
  - c) **Print End of Shift Report**
  - d) **Enter Tip Amount.**
- 4) Select **OK** when finished.

## Best Practices

When setting up your POS, ensure the screen settings and options align with the best possible operational flow of your respective Retail area. If settings are not necessary/used, ensure they are disabled to prevent staff from clicking unnecessary buttons.

Ensure your staff is familiar with settings to provide opportunities for your staff to enhance the Member experience. Settings such as Member Info, Member Preferences, and Member History can increase your staff's ability to provide a better level of service to your Members.

## FAQs

When settings are changed that impact the POS, do users need to exit out, and log back into the POS for the changes to take effect?

Yes, once changes are made, ensure users exit, and log in to a new POS session to ensure change(s) in settings take effect.