



POS Terminal/Workstation Device Setup

2016 - Fall Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Terminals](#)

[Accessing the Tool](#)

[Creating a New Terminal](#)

[General Information](#)

[Point of Sale Options](#)

[Workstation Devices](#)

[Accessing the Tool](#)

[Creating a New Workstation Device](#)

[General Information](#)

[Terminal Information](#)

[POS Implications and Helpful Hints](#)

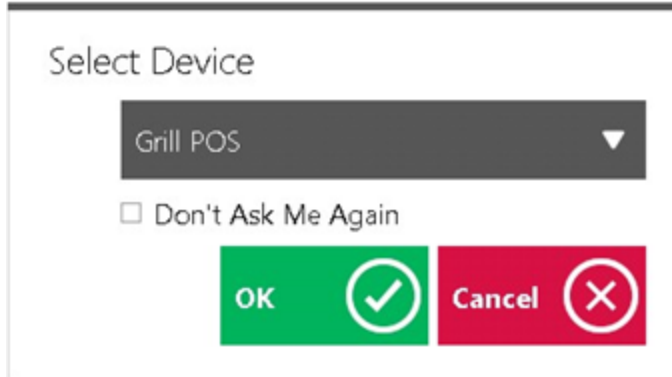
[Don't Ask Me Again](#)

[Common Questions and Concerns](#)

[Best Practices](#)

Overview

POS Workstation Devices are what the user selects when logging into the POS.



POS Workstation Devices have three layers to their setup. The first layer is the **Area**, followed by the **Terminal**, and lastly, the **Workstation Device**. Each specific layer of this hierarchy carries with it specific rules and features that will be used at the POS. For example, the Screen Group (menu) that is visible at the POS, is applied at the Area level. The Area is then tied to a Terminal, which has other POS options. Lastly, the Terminal is tied to a Workstation Device. When logging into the Workstation Device at the POS, the user will have access to all aspects of the Terminal that is linked to the Workstation Device, and ultimately the Area that is linked to the Terminal. Any changes to the bottom layers of this hierarchy, such as changing the Area that is attached to a Terminal, will also change the default setting of the Workstation Device. This is primarily because the Terminal is linked to the Workstation Device, and thus any changes to the Terminal or Area will in due course affect the Workstation Device.

In this document, we will demonstrate how to properly set up and link together a Terminal and Workstation Device. For information on Areas, please see our **Areas** document.

Use Case(s)

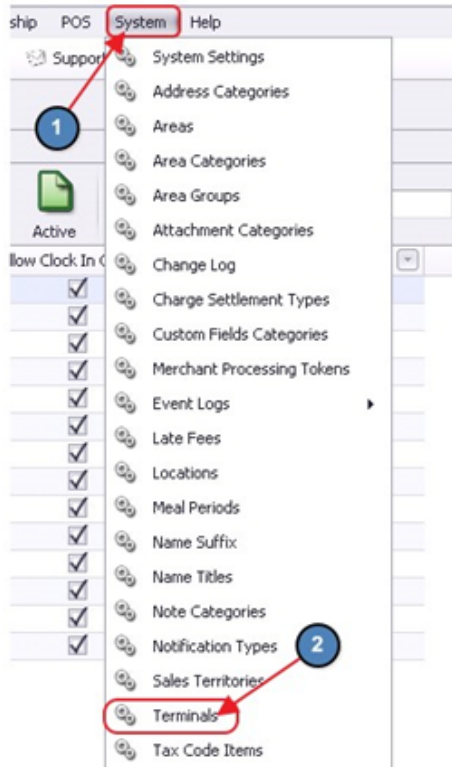
Due to the significant volume of transactions occurring in the Club's newly expanded Dining Room, Management decided to add another Workstation Device to ensure Dining Servers had adequate opportunities to enter orders and ring out tickets. The Workstation Device was linked to the existing Terminal connected to the Dining Room Area, however, had a separate receipt printer attached to it for ease of processing transactions.

Terminals

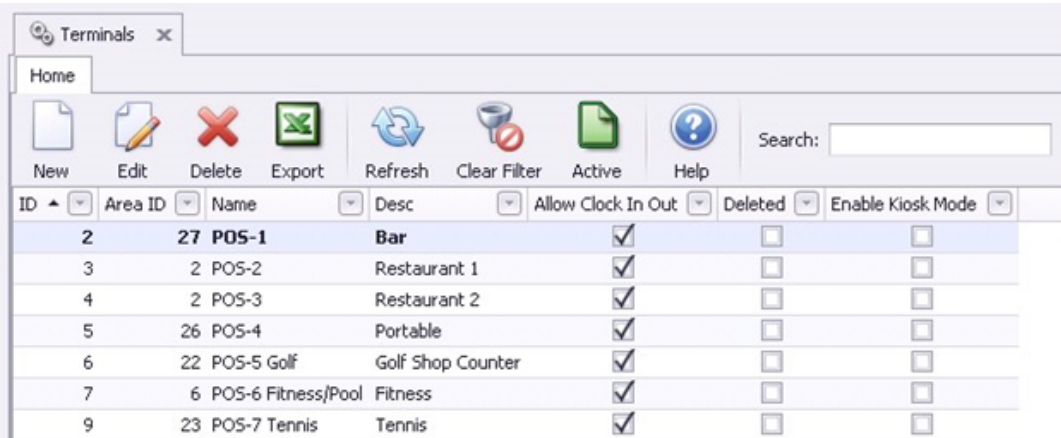
Terminals are used to apply certain POS related rules to specified workstation(s).

Accessing the Tool

To access Terminals, navigate to **System** across the top toolbar and select **Terminals**.



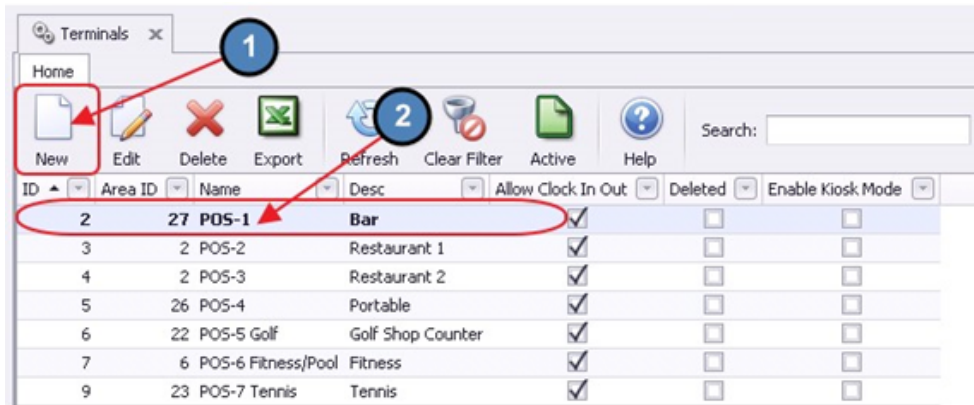
The **Terminals Grid** will launch.



The screenshot shows the 'Terminals Grid' window. It has a toolbar with icons for New, Edit, Delete, Export, Refresh, Clear Filter, Active, and Help. Below the toolbar is a table with columns: ID, Area ID, Name, Desc, Allow Clock In Out, Deleted, and Enable Kiosk Mode.

ID	Area ID	Name	Desc	Allow Clock In Out	Deleted	Enable Kiosk Mode
2	27	POS-1	Bar	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	2	POS-2	Restaurant 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	2	POS-3	Restaurant 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	26	POS-4	Portable	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	22	POS-5 Golf	Golf Shop Counter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	6	POS-6 Fitness/Pool	Fitness	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	23	POS-7 Tennis	Tennis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

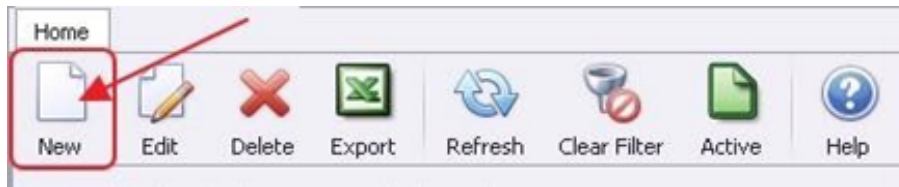
The primary functions associated with managing **Terminals** are embedded in the Terminal setup screen, which can be accessed by clicking the **New** button, or double-clicking on an existing Terminal.



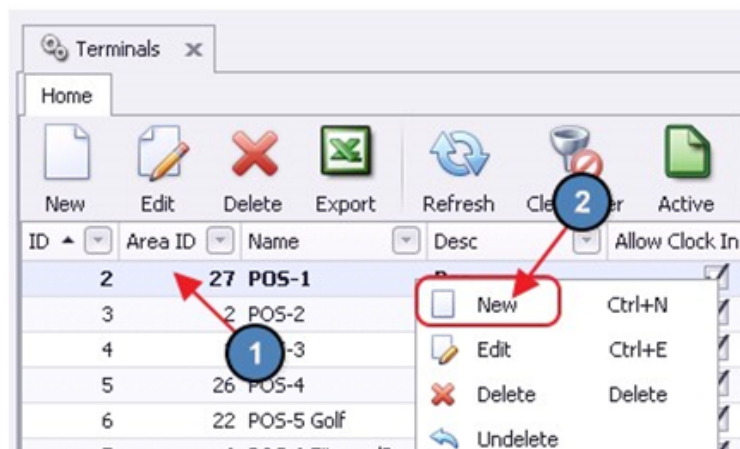
Creating a New Terminal

To create a new Terminal, navigate to the **Terminals Grid** and perform either of the following to launch the Terminal Type setup screen:

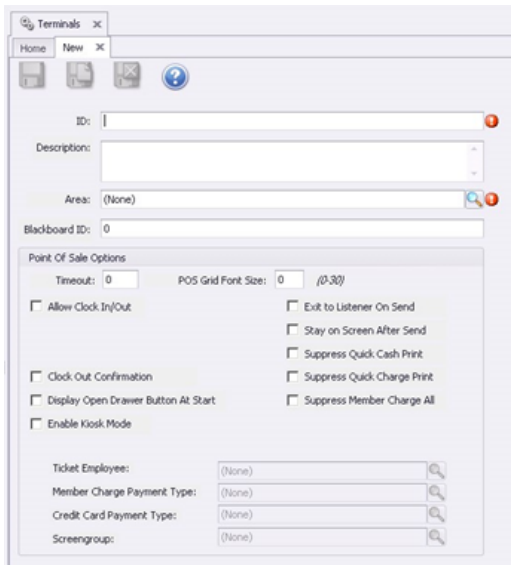
- a) Click the **New** icon on the toolbar.



- b) Right-click anywhere on the Member Types Grid and select **New**.



The Terminals setup screen will launch.



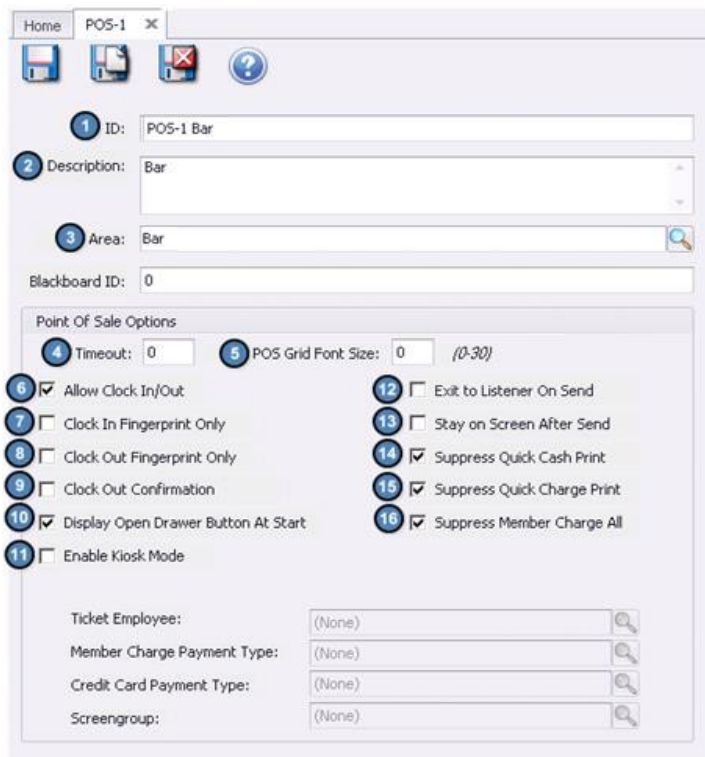
General Information

1. **ID** - give the terminal a name that describes which POS workstation or Area it will connect to.
2. **Description** - additional description is optional for internal view only.
3. **Default Area** - Select the Area that the workstation will default to (keep in mind the Area also determines the default screen group and table layout).

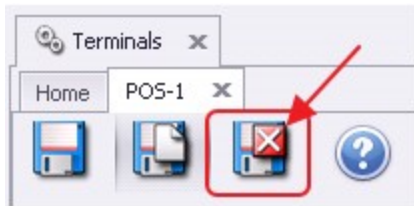
Point of Sale Options

4. **Timeout** - if idle how long before the terminal signs the server out.
5. **POS Grid Font Size** - how wide the member grid lines should be (18 & 19 is the default for touch screens).
6. **Allow Clock In/Out** - if using Timekeeping this must be checked.
7. **Clock In Fingerprint Only** - only check this field if using a fingerprint device for clock in/out or accessing tickets.
8. **Clock Out Fingerprint Only** - only check this field if using a fingerprint device for clock in/out or accessing tickets.
9. **Clock out confirmation** - if using timekeeping it is recommended that this field be checked.

10. **Display Open Drawer Button At Start** - if checked, a button in the main POS screen will activate allowing the cash drawer to be opened without having to settle a ticket.
11. **Enable Kiosk Mode** - Only used when Kiosk Mode is utilized. Please see our **Kiosk Mode** manual for additional details.
12. **Exit to Listener On Send** - if checked, the workstation will exit back to Employee login screen after **Send** is selected in the POS. This is typically used when more than one server will be using the same workstation.
13. **Stay on Screen After Send** - if checked, the user will stay in the POS screen after send. This setting is mostly used for bar terminals where only one server works the area/terminal.
14. **Suppress Quick Cash Print** - if checked, the system will not print a member receipt with Quick Cash Settlements.
15. **Suppress Quick Charge Print** - if checked, the system will not print a member receipt with Quick Charge Settlements.
16. **Suppress Member Charge All** - if checked, the Member Charge All feature will be removed at the POS.



Lastly, click **Save & Close** to complete the setup of the new Terminal.



Workstation Devices

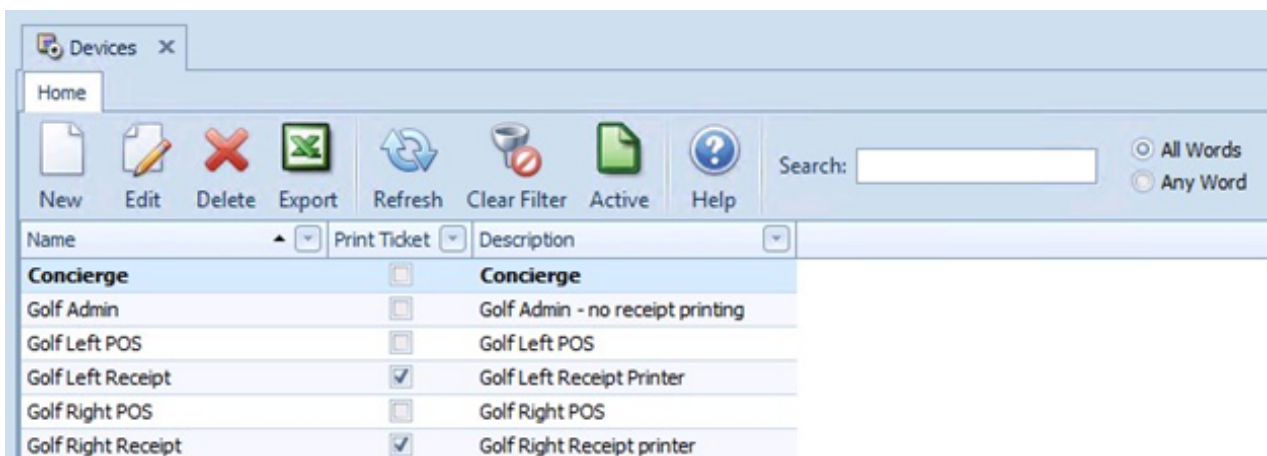
As mentioned earlier, Workstation Devices are what the user selects when logging in to the POS.

Accessing the Tool

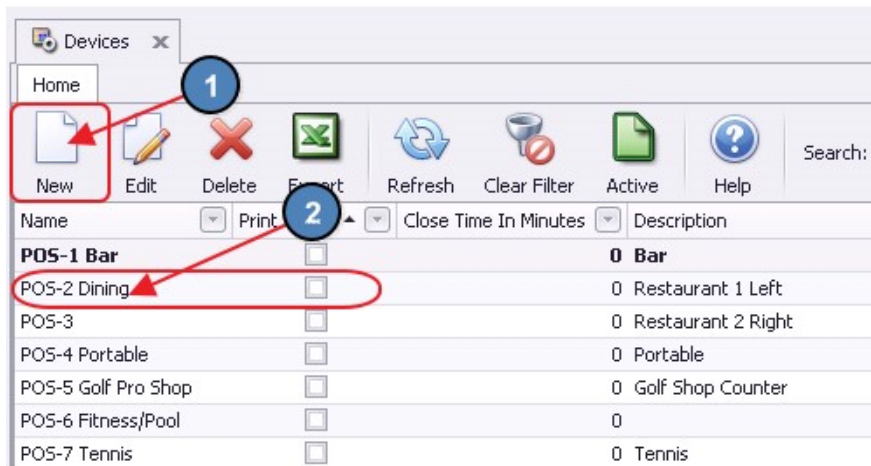
To create a new Workstation Device, navigate to **POS** across the top toolbar and select **Devices**.



The POS Devices Grid will launch.



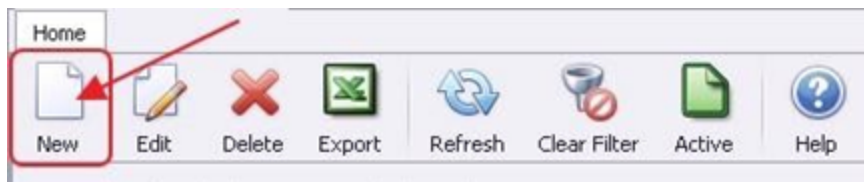
The primary functions associated with managing **Devices** are embedded in the Device setup screen, which can be accessed by clicking the **New** button, or double-clicking on an existing Device.



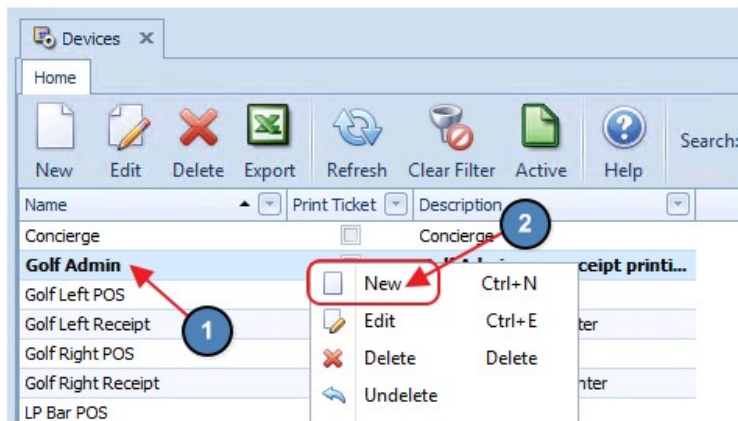
Creating a New Workstation Device

To create a new Workstation Device, perform either of the following to launch the POS Device setup screen:

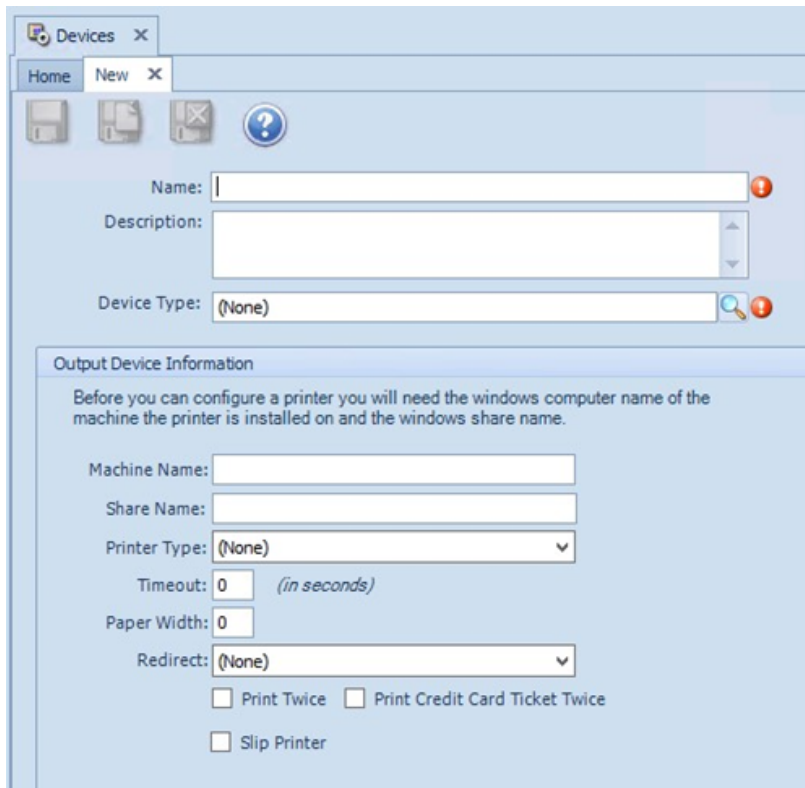
- a) Click the **New** icon on the toolbar.



- b) Right-click anywhere on the POS Devices Grid and select **New**.

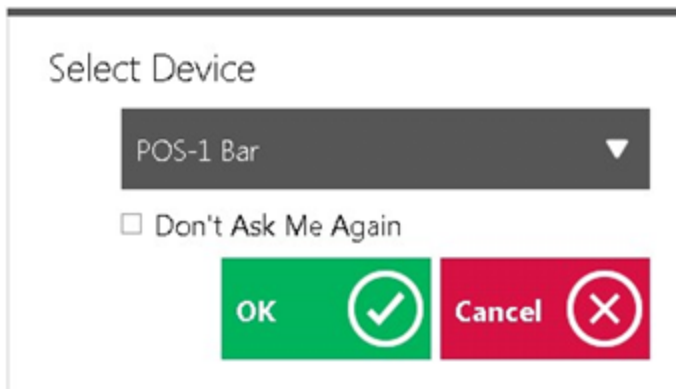


The POS Device setup screen will launch.



General Information

1. **Name** - enter a **Name** for the new Workstation Device. Again, this will be the name that appears in the **Select Device** drop down at the POS.



2. **Description** - provide a **Description** of the new Workstation Device (Optional).
3. **Device Type** - select **Terminal** from the Device Type Lookup. This will populate additional Terminal options.

Terminal Information

4. **Terminal** - select the new **Terminal** that was previously created.

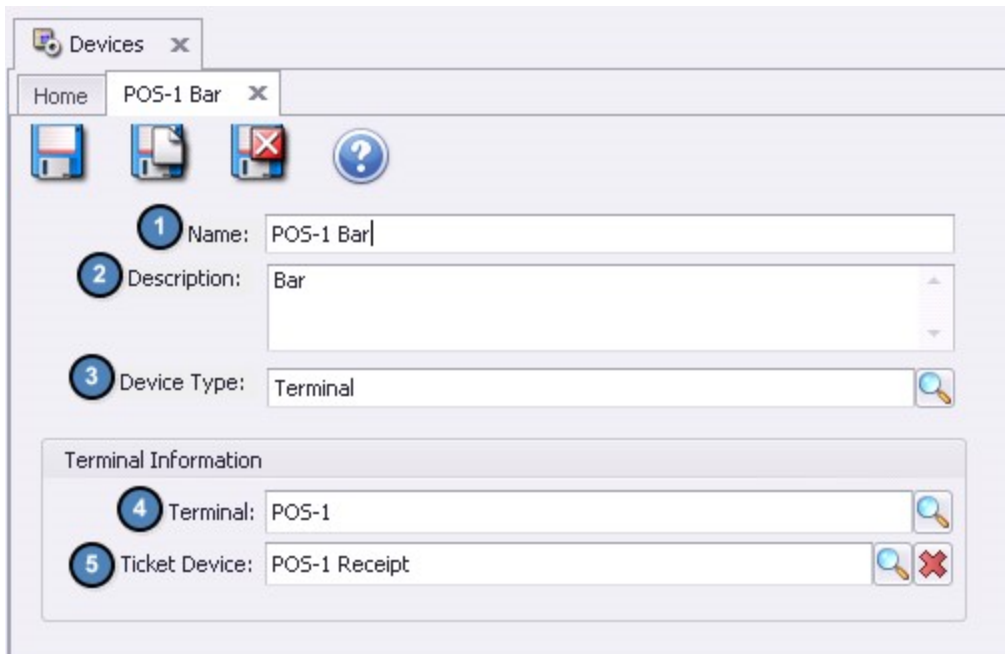
Note: Remember, the **Area** that is attached to the **Terminal** selected here will be the Area the Workstation Device defaults to when selected at the POS.

5. **Ticket Device** - select the Ticket Device (Receipt Printer) that should be used for this Workstation.

Important:

*Please keep in mind that Workstation Devices are concurrent, meaning that regardless of where the user is at the club, if they are logged into a specific Workstation Device, any transactions completed within that Workstation Device will print to the receipt printer that is attached to that Workstation Device. For example, if the user is in the Fitness Center at the club, but they are logged into the Bar Workstation Device, any transaction that is completed will print to the Receipt Printer that is attached to the Bar Workstation Device. **This is a great feature when using tablets to ring in POS tickets.**

The concurrent ticket printing feature does **NOT apply to Send Tickets (Tickets sent to the Kitchen). Send Tickets are configured at the Item Category Level. Please see our Clubessential Items manual for more information on Item Categories.



The screenshot shows a software interface for configuring a terminal. At the top, there are tabs for 'Home' and 'POS-1 Bar'. Below the tabs are several icons: a floppy disk, a printer, a printer with a red 'X', and a question mark. The main configuration area has five numbered steps:

- 1 Name: POS-1 Bar
- 2 Description: Bar
- 3 Device Type: Terminal
- 4 Terminal: POS-1
- 5 Ticket Device: POS-1 Receipt

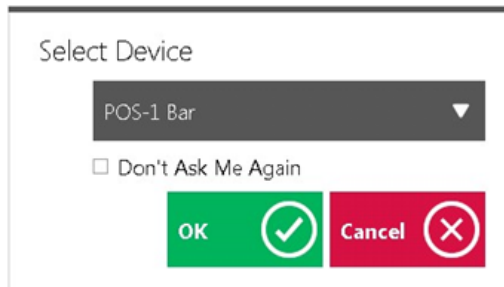
The 'Terminal Information' section is highlighted with a grey background and contains the last two steps. Each field has a search icon (magnifying glass) and a red 'X' icon for deletion.

Lastly, click **Save & Close** to complete the setup of the new Terminal.

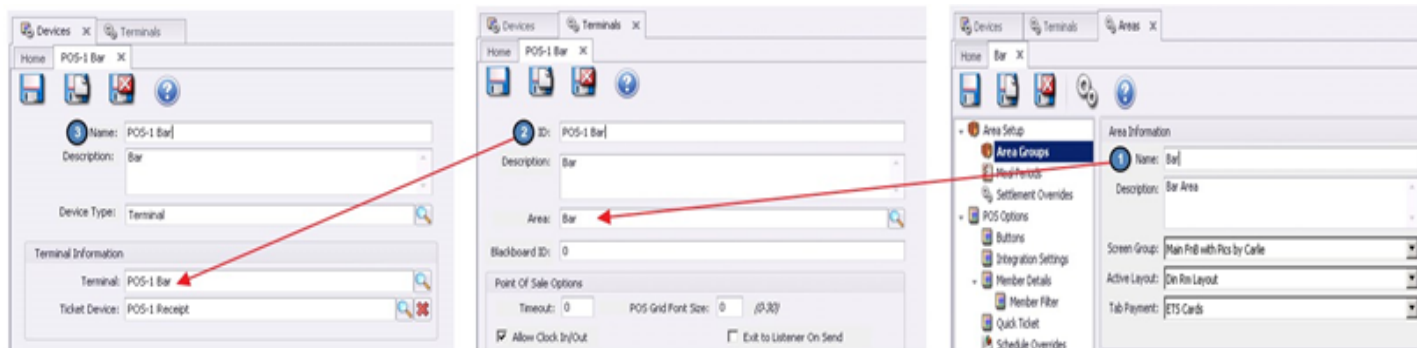


POS Implications and Helpful Hints

As mentioned, once a Workstation Device is created, it will appear in the **Select Device** drop down at the POS.

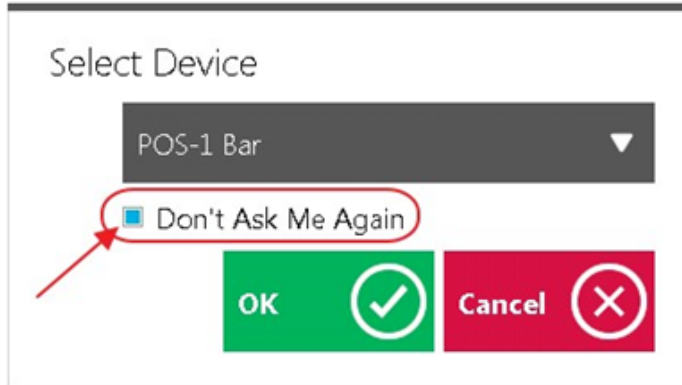


When this Workstation Device is selected, the employee will experience, and have access to all Terminal and Area setting that are attached to the Workstation Device. For instance, being that the **Workstation Device** we created called POS- 1 Bar is linked to the POS- 1 Bar **Terminal** and the **Area**, Bar is linked to the POS 1- Bar Terminal, the Bar Area will show by default when an employee logs into the POS-1 Bar Workstation Device.



Don't Ask Me Again

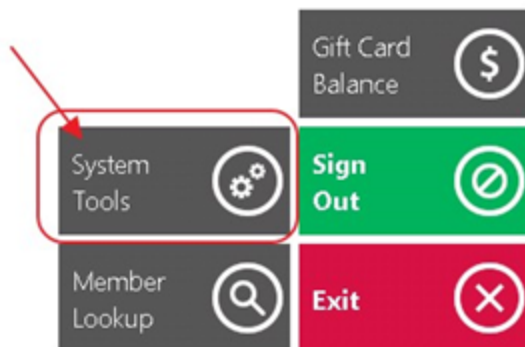
If a particular computer will only login to one Workstation Device at all times, the user can select the Device they would like to login into and choose **Do Not Ask Me Again**.



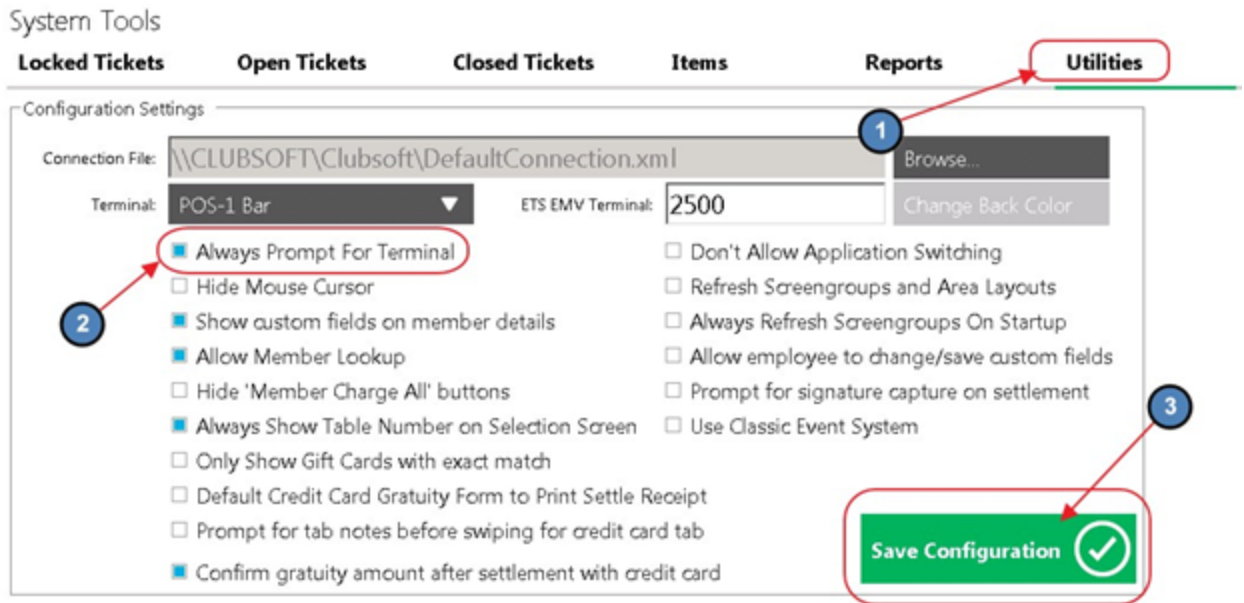
Now, when the POS application is launched on that particular computer, by default the user will automatically login to the Workstation Device that was selected after Do Not Ask Me Again was chosen.

Notes:

- 1) If the computer needs to log into several different Workstation Devices, **do not** select Don't Ask Me Again.
- 2) If the user is not prompted to select a Device or accidentally checked the "Don't Ask Me Again" box, please follow the below instructions to get the Select Device drop down back:
 - a. Sign into the POS
 - b. Select **System Tools** on the bottom left hand corner of the screen.



- c. Select **Utilities**, check **Always Prompt for Terminal**, and select **Save Configuration**.



- d. The Select Device drop-down will now be visible when the POS application is launched.

Common Questions and Concerns

I no longer have an option to select my device when I log-in. How can I re-enable this option?

Go to System Tools, Utilities Tab, and check **Always Prompt for Terminal**.

Best Practices

When naming Workstation Devices, apply standards in naming conventions to ensure location of stations are clear, especially in areas that have more than one Workstation Device.

Use the **“Don't Ask Me Again”** feature to auto-set the Workstation Device for a computer, when the computer always logs in to the same device.