



Screen Group Designer

2017 – Fall Edition

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Overview

Screen Group Designer is a tool used to build various **POS** menus that will be utilized throughout the club. Screen Group buttons can be customized in terms of their **position** on screen, **size**, **color**, and **font**. Various types of buttons can be created within a **Screen Group**. These Button Types include **Item Category**, **Individual Item**, **Modifier**, **Modifier Groups**, **Specials**, **Item Combo**, and **Screen Group**.

In this guide we will discuss how to **create** a new **Screen Group**, how to add each type of **button** created within a Screen Group, how to **customize** the look and feel of a Screen Group, as well as how to **apply** a Screen Group to a specific **Area**.

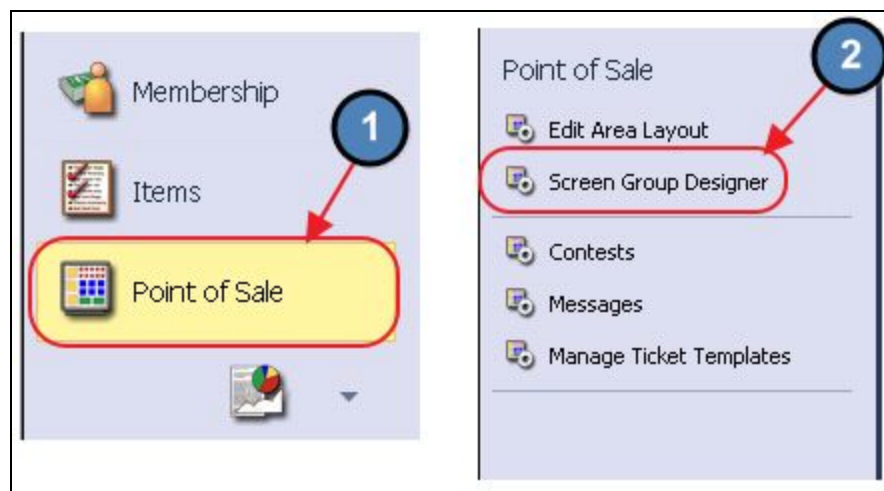
Use Case(s)

- Club needs to create a new Screen Group for their Grill Area.
- A button needs to be created for a new Item Category.
- A current Screen Group needs to be realigned.

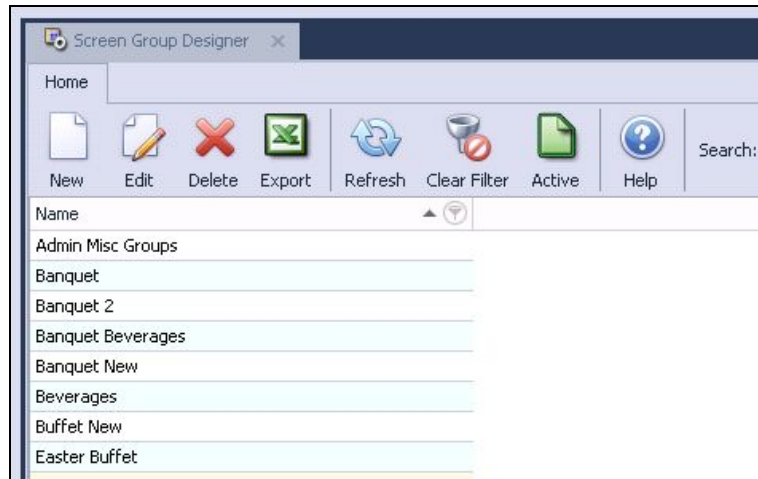
Accessing the Tool

To Access **Screen Group Designer**:

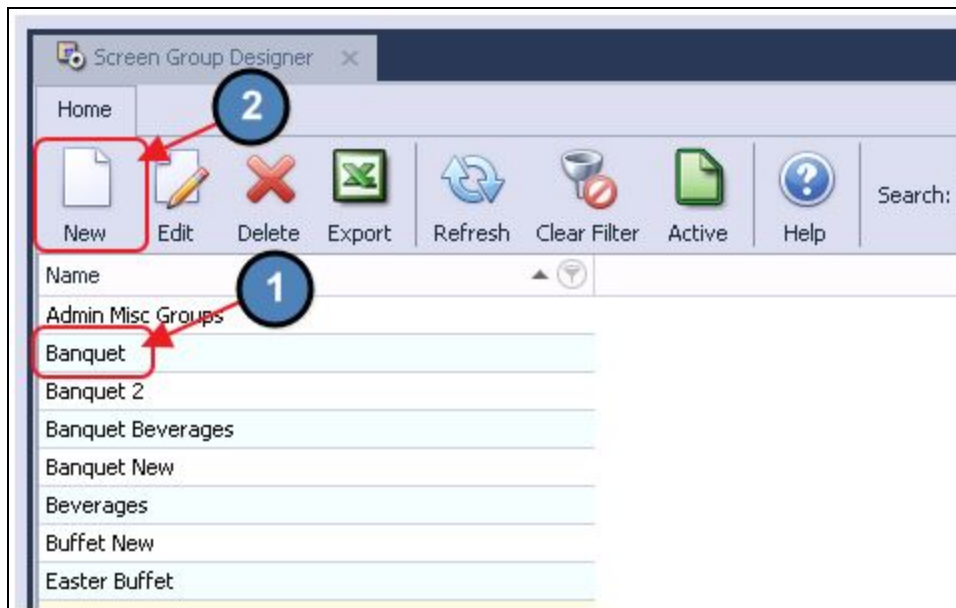
- 1) Select the **Point of Sale** module from the left user menu and choose **Screen Group Designer**.



2) The **Screen Group Designer Grid** will launch.



3) The primary functions associated with managing Screen Groups, creation, formatting, assigning, etc., are embedded in the Screen Group setup screen. This screen can be accessed by double-clicking on an existing **Screen Group**, or clicking the **New** button.



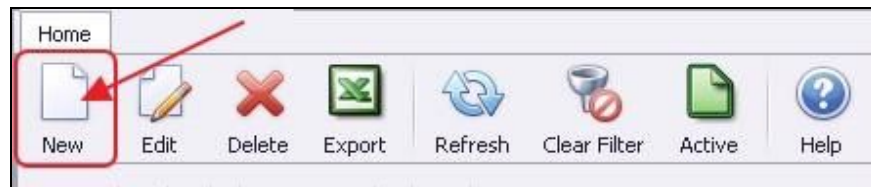
Creating a New Screen Group

To create a new **Screen Group**:

- 1) Navigate to the **Screen Group Designer Grid** and perform either of the following options to launch the Screen Group setup screen.

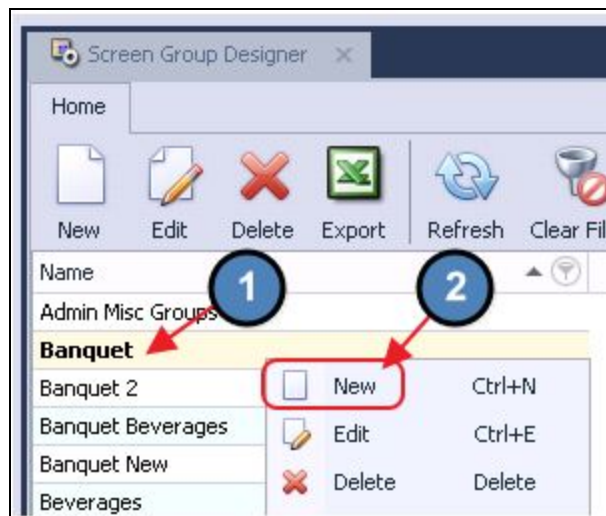
Option 1

Click the **New** icon on the toolbar.

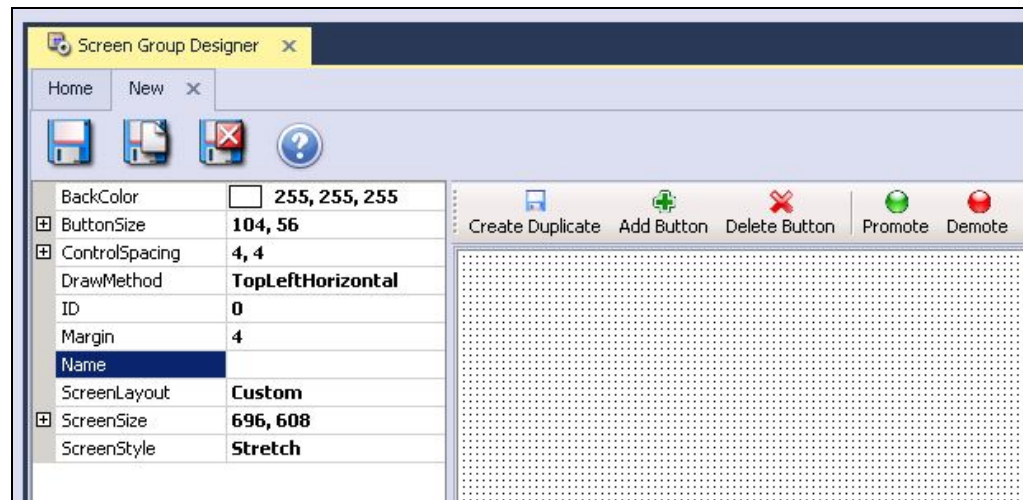


Option 2

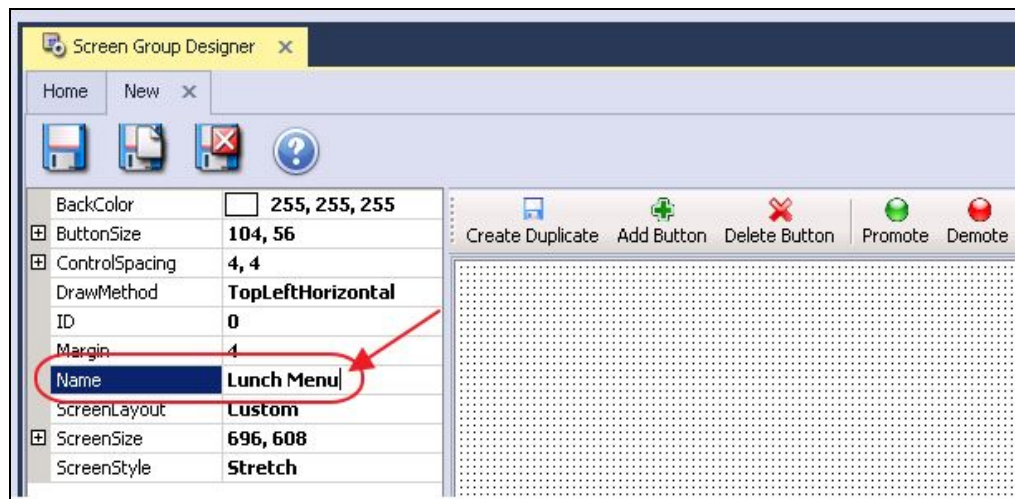
Right-click anywhere on the Screen Group Designer Grid and select **New**.



- 2) The Screen Group **setup** screen will launch.



3) Enter in a **Name** for the new Screen Group (Ex: Lunch Menu).



Please Note: The **Draw Method** (how the screen is spatially organized) for a new Screen Group defaults to **Top Left Horizontal**. In this Draw Method, Screen Groups cannot be customized.

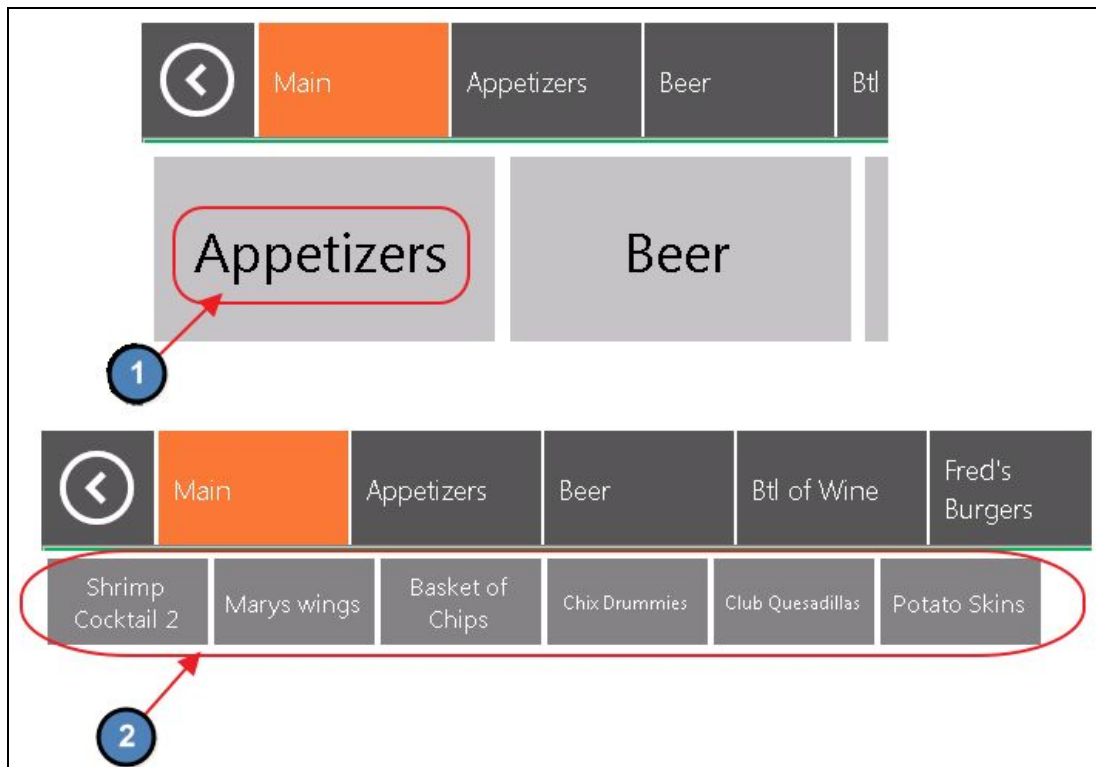
Please review the [Customizing Screen Groups](#) section of this document for an exact explanation on how to customize Screen Groups.

Button Types

As previously mentioned, there are several types of buttons that can be added to Screen Groups. In this section, we will review each type of button.

Category Button

The most commonly used type of button is a **Category Button**. Selecting a Category Button within the POS will display all Items within the Category. For example, by selecting the **Appetizer** button, all Items within the **Appetizer** Item Category will display.

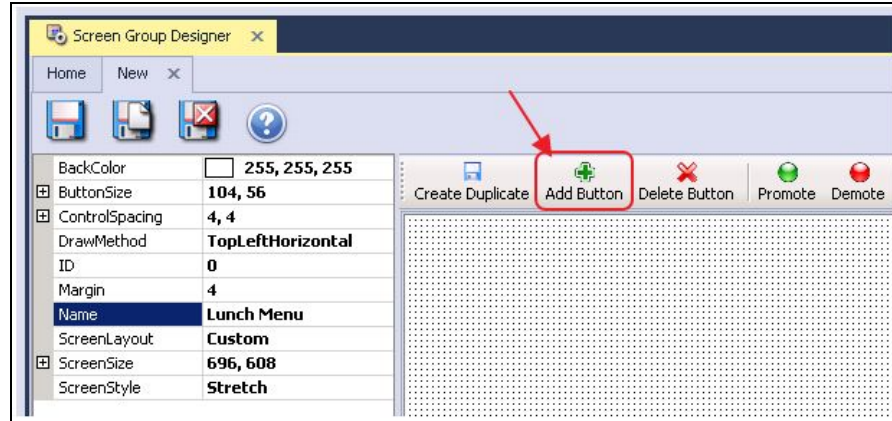


For more information on Item Categories, please see our [Items Manual](#).

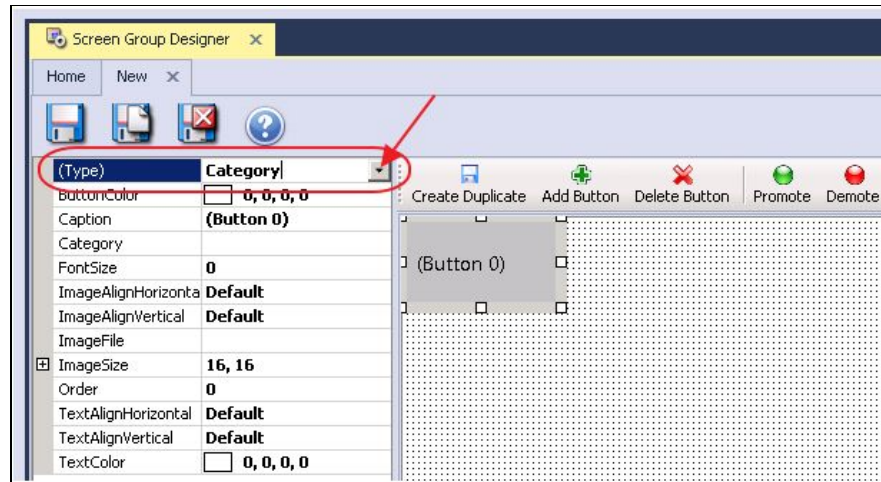
Creating a Category Button

To create a **Category** button:

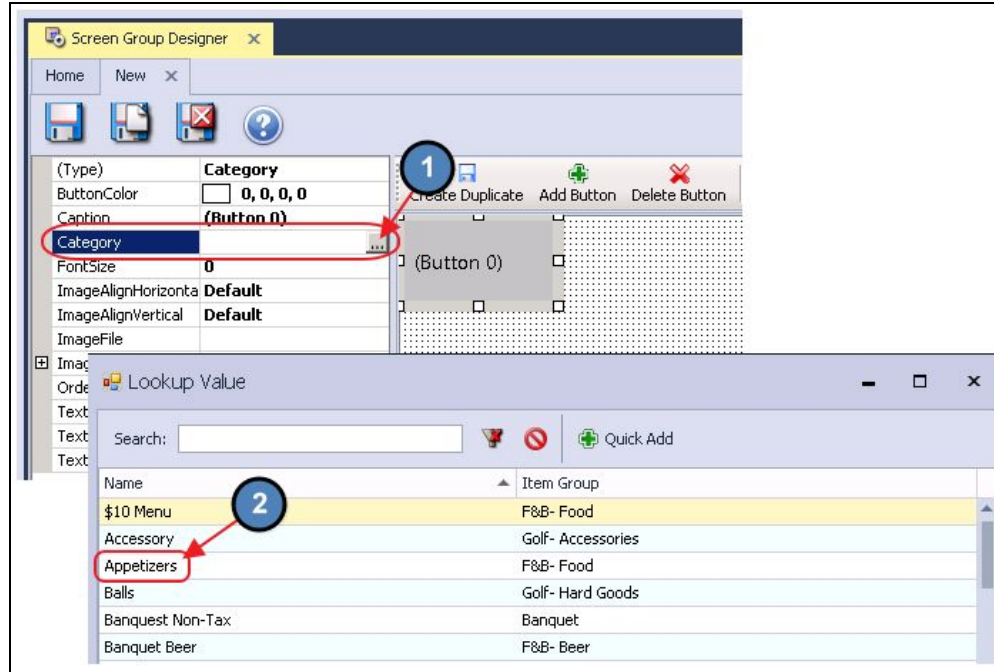
- 1) Select **Add Button**.



2) Select **Category** as the Button Type (Set to Category by default).

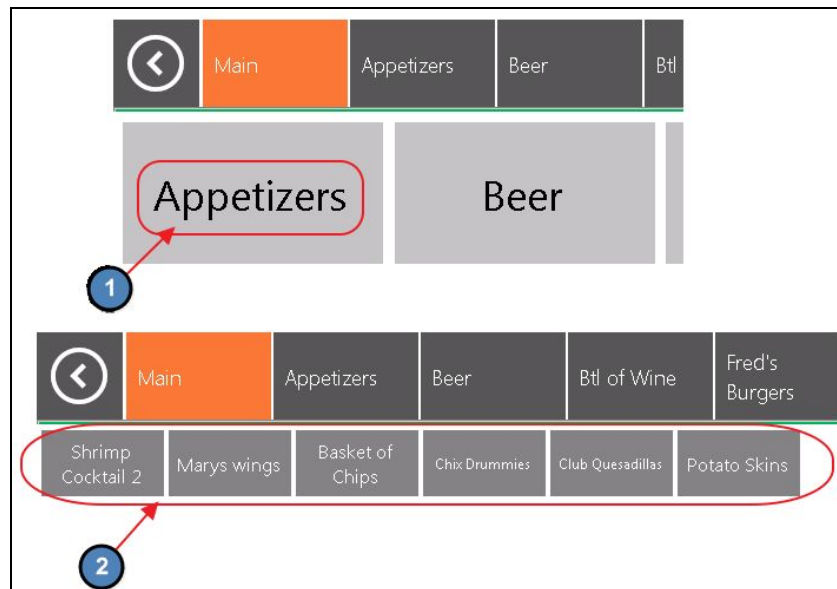


3) Select the **Category** for which you'd like to create a button.



4) This button will link to a screen that automatically displays all Items within the **Item Category**.

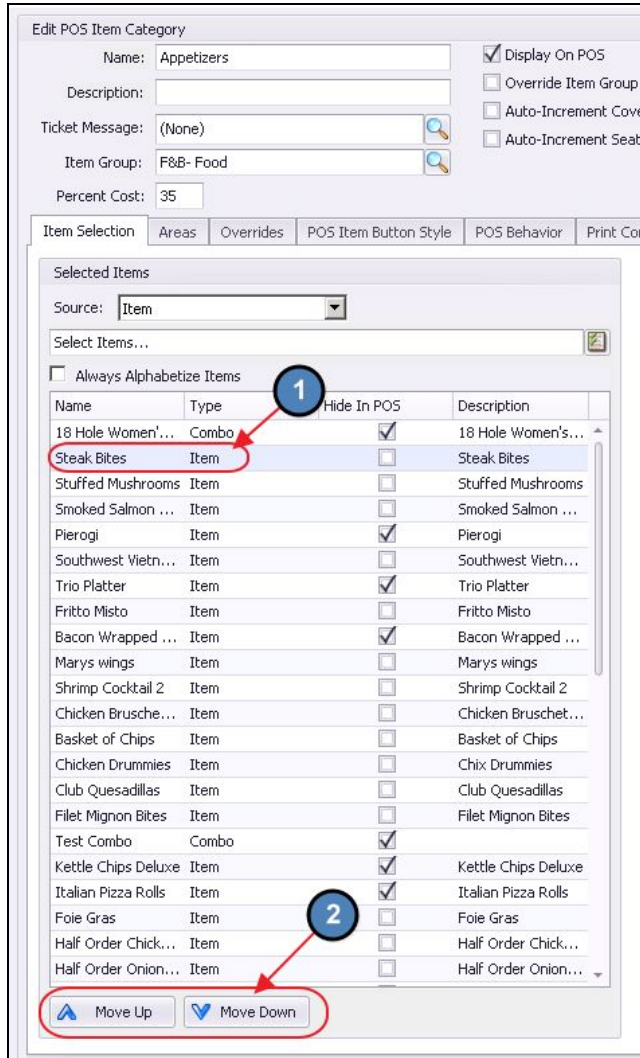
Please Note: It is not necessary to create a Screen Group that includes an individual button for each Appetizer Item, the system does this for you as a result of the **Category** button.



- 5) If necessary, the order in which the Items within a Category display on screen can be adjusted through the **Item Category setup/edit form**.

Option 1

Select the Item and use the **Move Up** and **Move Down** buttons to arrange the display order.



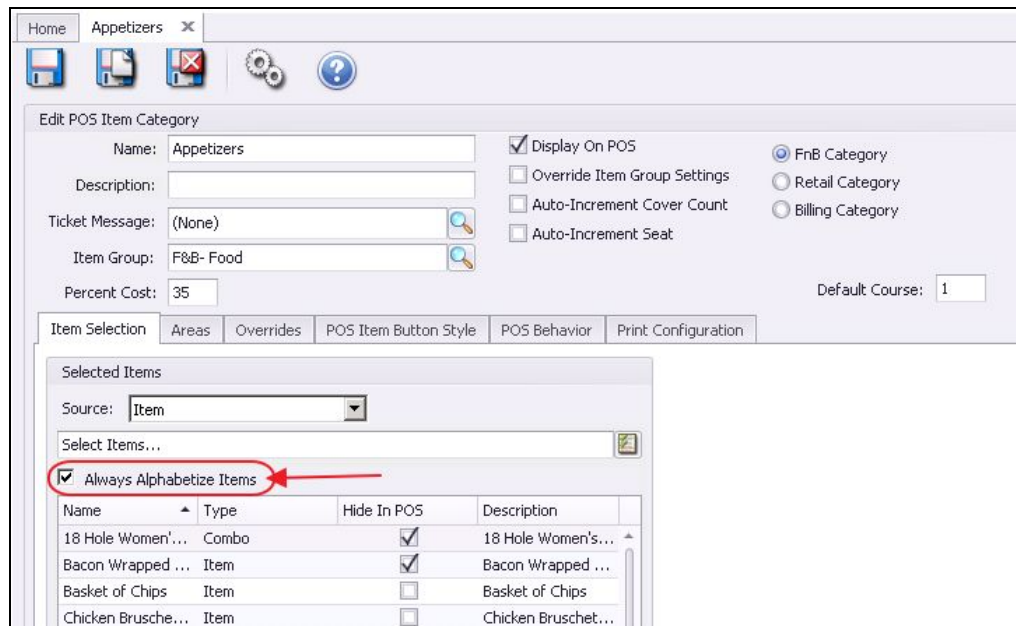
The screenshot shows the 'Edit POS Item Category' form. The 'Name' field is 'Appetizers'. The 'Selected Items' table is as follows:

Name	Type	Hide In POS	Description
18 Hole Women'...	Combo	<input checked="" type="checkbox"/>	18 Hole Women'...
Steak Bites	Item	<input type="checkbox"/>	Steak Bites
Stuffed Mushrooms	Item	<input type="checkbox"/>	Stuffed Mushrooms
Smoked Salmon ...	Item	<input type="checkbox"/>	Smoked Salmon ...
Pierogi	Item	<input checked="" type="checkbox"/>	Pierogi
Southwest Vietn...	Item	<input type="checkbox"/>	Southwest Vietn...
Trio Platter	Item	<input checked="" type="checkbox"/>	Trio Platter
Fritto Misto	Item	<input type="checkbox"/>	Fritto Misto
Bacon Wrapped ...	Item	<input checked="" type="checkbox"/>	Bacon Wrapped ...
Marys wings	Item	<input type="checkbox"/>	Marys wings
Shrimp Cocktail 2	Item	<input type="checkbox"/>	Shrimp Cocktail 2
Chicken Brusche...	Item	<input type="checkbox"/>	Chicken Bruschet...
Basket of Chips	Item	<input type="checkbox"/>	Basket of Chips
Chicken Drummies	Item	<input type="checkbox"/>	Chix Drummies
Club Quesadillas	Item	<input type="checkbox"/>	Club Quesadillas
Filet Mignon Bites	Item	<input type="checkbox"/>	Filet Mignon Bites
Test Combo	Combo	<input checked="" type="checkbox"/>	
Kettle Chips Deluxe	Item	<input checked="" type="checkbox"/>	Kettle Chips Deluxe
Italian Pizza Rolls	Item	<input checked="" type="checkbox"/>	Italian Pizza Rolls
Foie Gras	Item	<input type="checkbox"/>	Foie Gras
Half Order Chick...	Item	<input type="checkbox"/>	Half Order Chick...
Half Order Onion...	Item	<input type="checkbox"/>	Half Order Onion...

At the bottom of the table, there are two buttons: 'Move Up' and 'Move Down'.

Option 2

Check the **Always Alphabetize Items** check box. If checked, the Items will be listed in alphabetical order on the POS screen.



Item Button

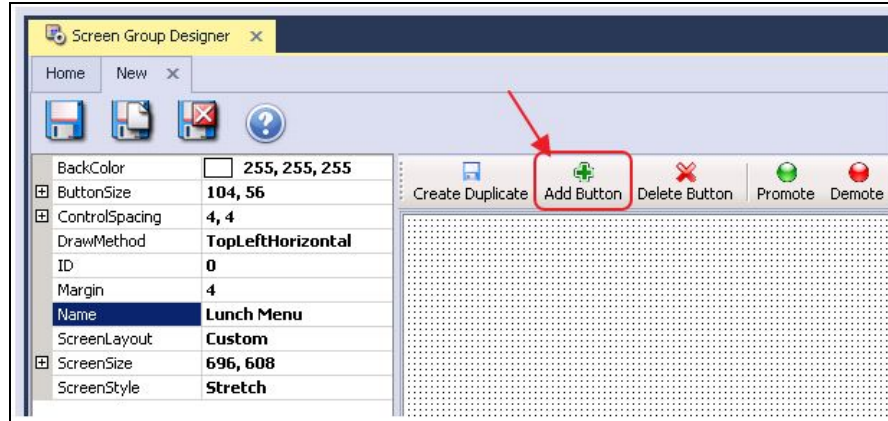
Users can use the **Item Button** to link a POS button to an individual Item, such as Potato Skins. Some Clubs find it useful to add buttons for frequently ordered Items, such as Diet Coke on their home screens. For more information on Items, please see our [Items Manual](#).



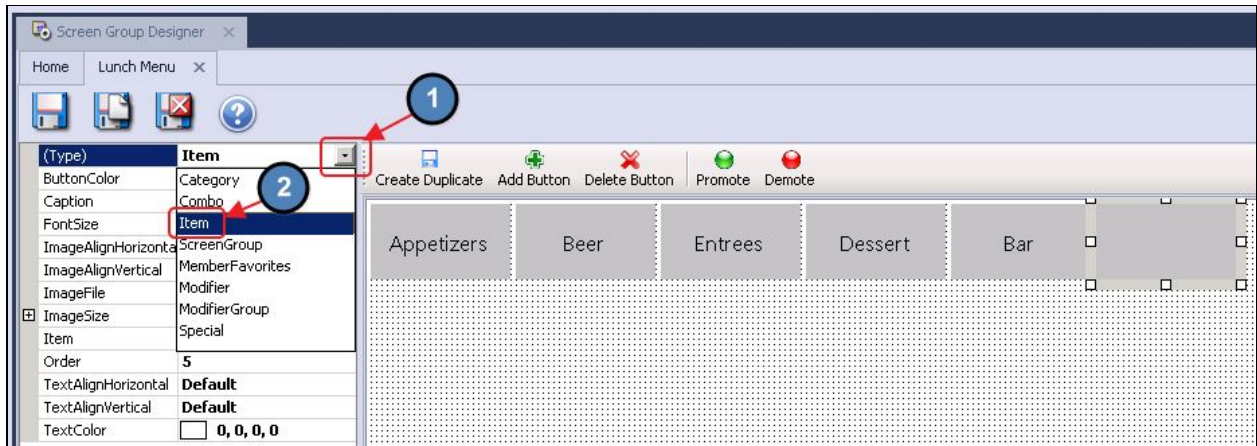
Creating an Item Button

To create a **button** for an individual Item:

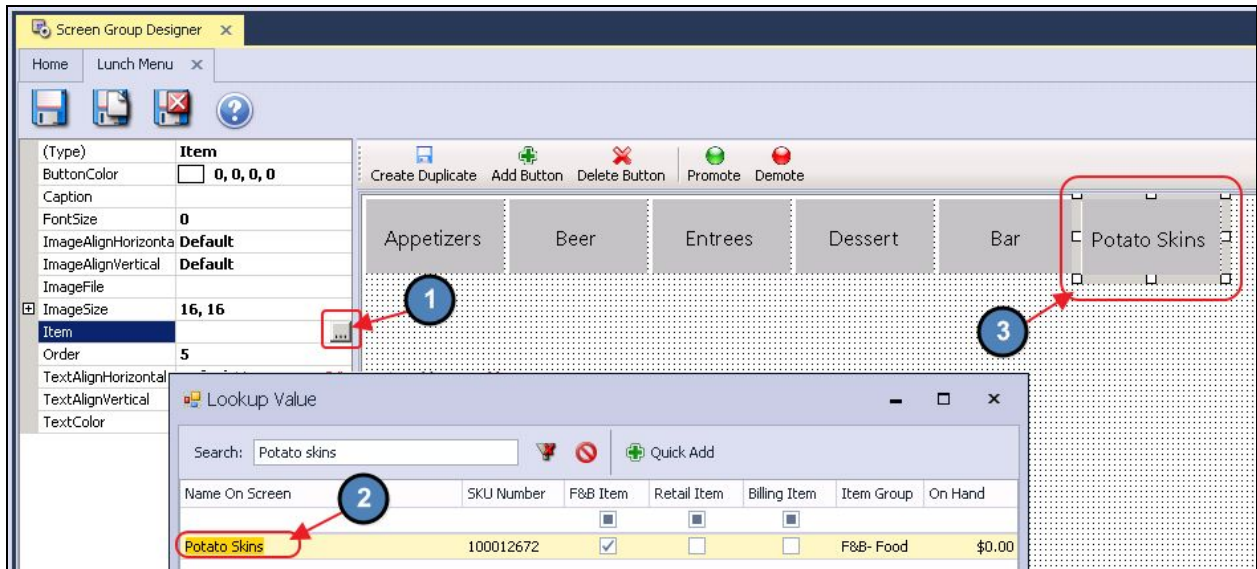
- 1) Select **Add Button**.



2) Select **Item** as the Button Type.



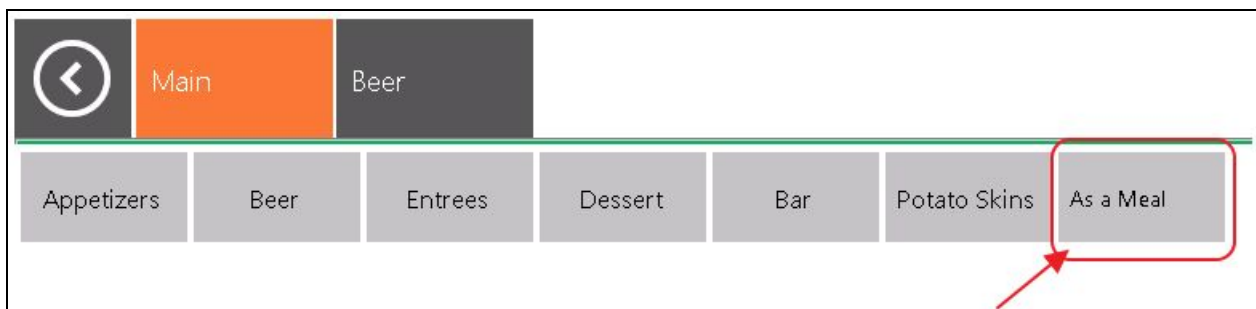
3) Select the **Item** for which you'd like to create a button.



Modifier Button

Modifier buttons provide the wait staff with quick access to frequently used Modifiers. For example, you might place the **As a Meal** button on your home screen.

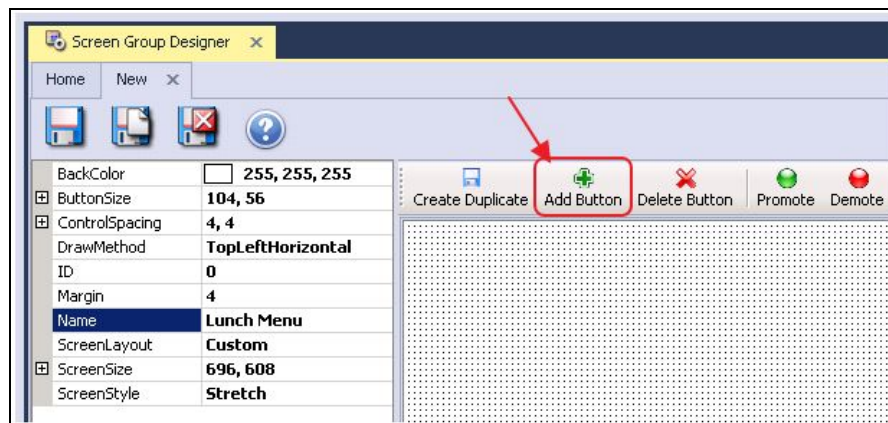
Please note: Most Items have forced Modifiers attached to their setup. However, this option gives users the ability to add frequently used Modifiers that would not typically be attached to an Item. For more information on Item Modifiers, please see our [Item Modifier Controls Manual](#).



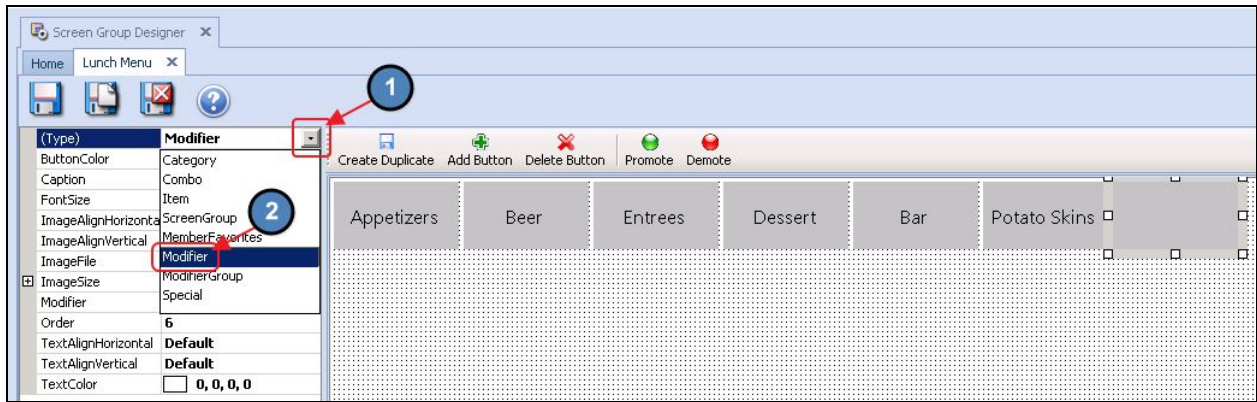
Creating a Modifier Button

To create a button for an individual **Modifier**:

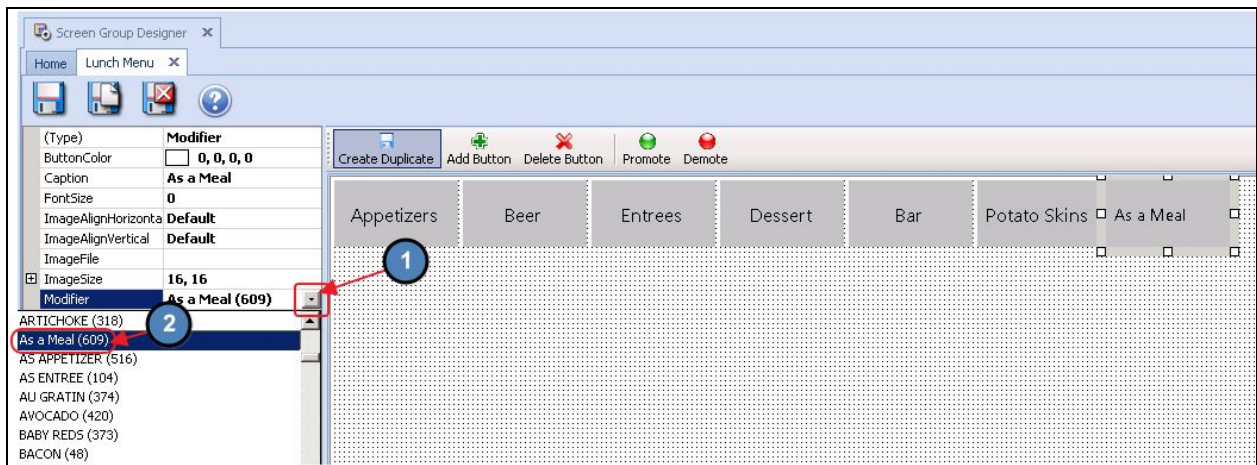
- 1) Select **Add Button**.



- 2) Select **Modifier** as the Button Type.



3) Select the **Modifier** for which you'd like to create a button.



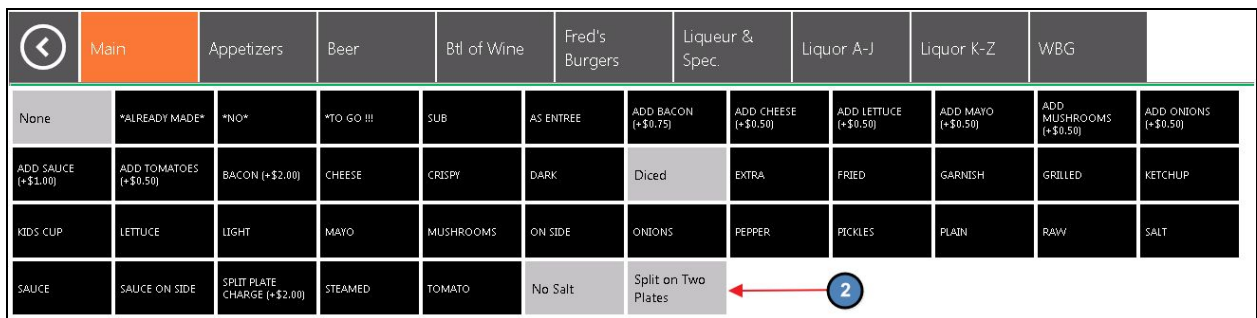
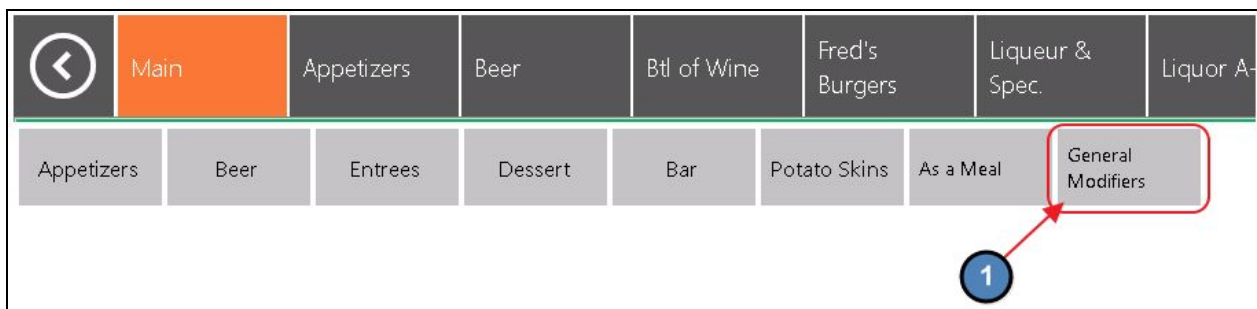
4) Now at the **POS**, this button can be used as a **Modifier** on currently ordered Items.



Modifier Group Button

A Modifier Group Button provides the wait staff quick access to frequently used **Modifier Groups**. Modifier Groups represent a collection of Modifiers nested under a single entity.

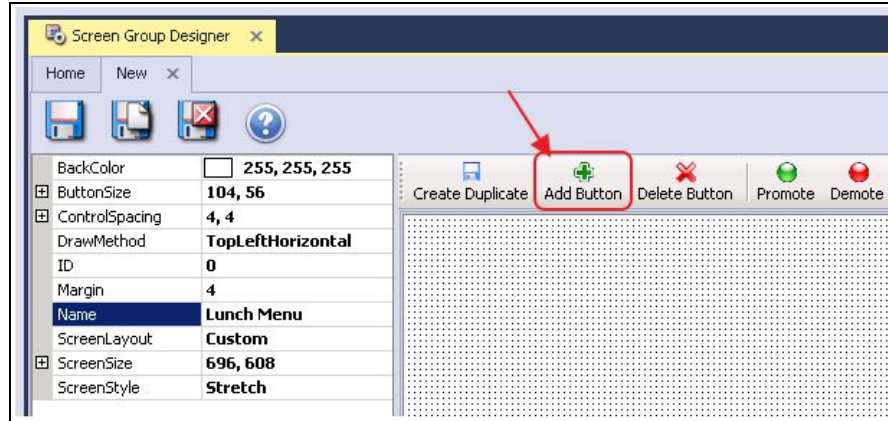
For example, you might use this to place a button on your home screen that links to a list of General Modifiers such as **No Salt, Split Item, or Bring Two Plates**. For more information on creating Modifier Groups, please see our [Item Modifier Controls Manual](#).



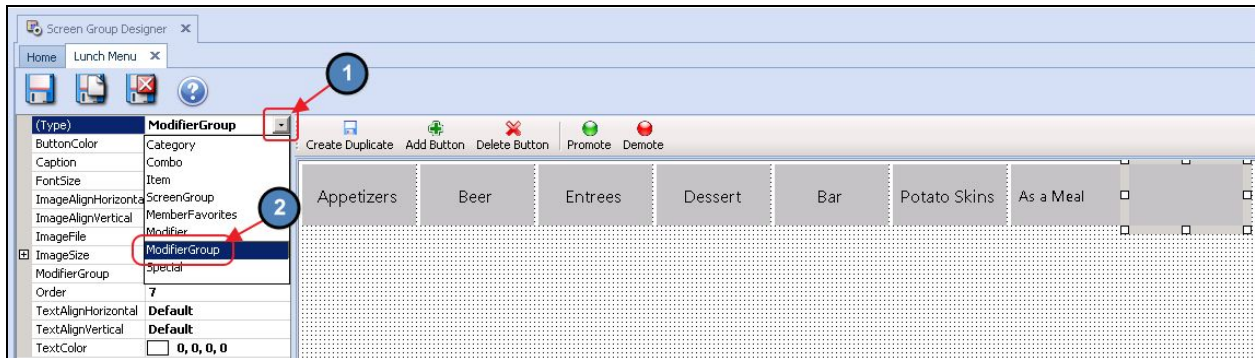
Creating a Modifier Group Button

To create a button for a Modifier Group:

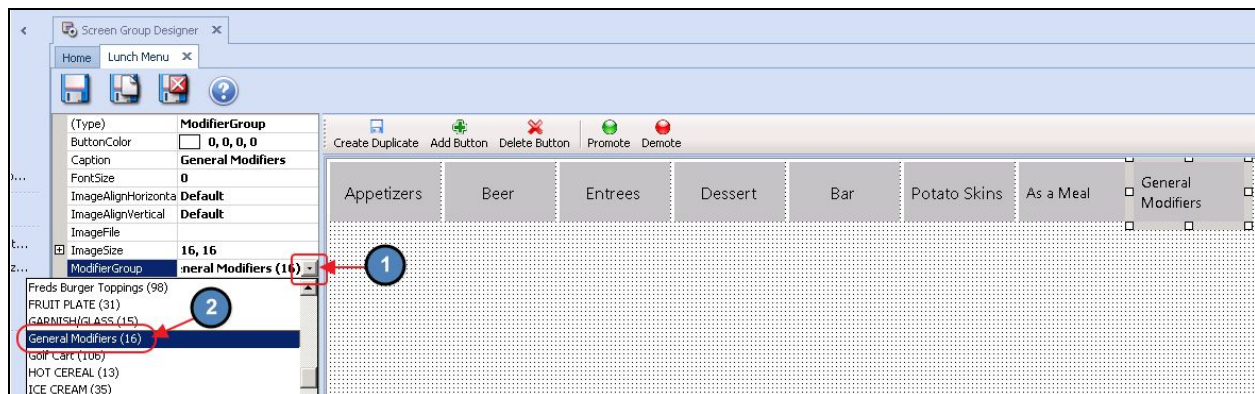
- 1) Select **Add Button**.



2) Select **Modifier Group** as the Button Type.



3) Select the **Modifier Group** for which you'd like to create a button.



4) Now, when selected at the **POS**, this button will take the user to a list of **Modifiers** within the **Modifier Group**, that can then be used on currently ordered Items.

Member Info: ID: 001, Type: Guest, Min Bal: \$0.00, ggould@clubessential.com

Menu: Main (highlighted), Appetizers, Beer, Btl of Wine, Fred's Burgers, Liqueur & Spec., Liquor

Sub-menu: Appetizers, Beer, Entrees, Dessert, Bar, Potato Skins, As a Meal, General Modifiers (highlighted)

Seat 1, Select All, Female, Child

Q	Name	Price	S	C
1	Potato Skins	\$6.00	1	1

Member Info: ID: 001, Type: Guest, Min Bal: \$0.00, ggould@clubessential.com

Menu: Main (highlighted), Appetizers, Beer, Btl of Wine, Fred's Burgers, Liqueur & Spec., Liquor A-J, Liquor K-Z, WBG

None	*ALREADY MADE*	*NO*	*TO GO !!!	SUB	AS ENTREE	ADD BACON (+\$0.75)	ADD CHEESE (+\$0.50)	ADD LETTUCE (+\$0.50)	ADD MAYO (+\$0.50)	ADD MUSHROOMS (+\$0.50)	ADD ONIONS (+\$0.50)
ADD SAUCE (+\$1.00)	ADD TOMATOES (+\$0.50)	BACON (+\$2.00)	CHEESE	CREPY	DARK	Diced	EXTRA	FREED	GARNISH	GRILLED	KETCHUP
KIDS CLIP	LETTUCE	LIGHT	MAYO	MUSHROOMS	ON SIDE	ONIONS	PEPPER	PICKLES	PLAIN	RAW	SALT
SAUCE	SAUCE ON SIDE	SPLIT PLATE CHARGE (+\$2.00)	STEAMED	TOMATO	No Salt	Split on Two Plates					

Sub-menu: Appetizers, Beer, Entrees, Dessert, Bar, Potato Skins, As a Meal, General Modifiers, Daily Specials

Seat 1, Select All, Female, Child

Q	Name	Price	S	C
1	Potato Skins	\$6.00	1	1
	-No Salt		1	1

Daily Specials Button

A **Daily Specials** button provides the wait staff quick access to the specials of the day.

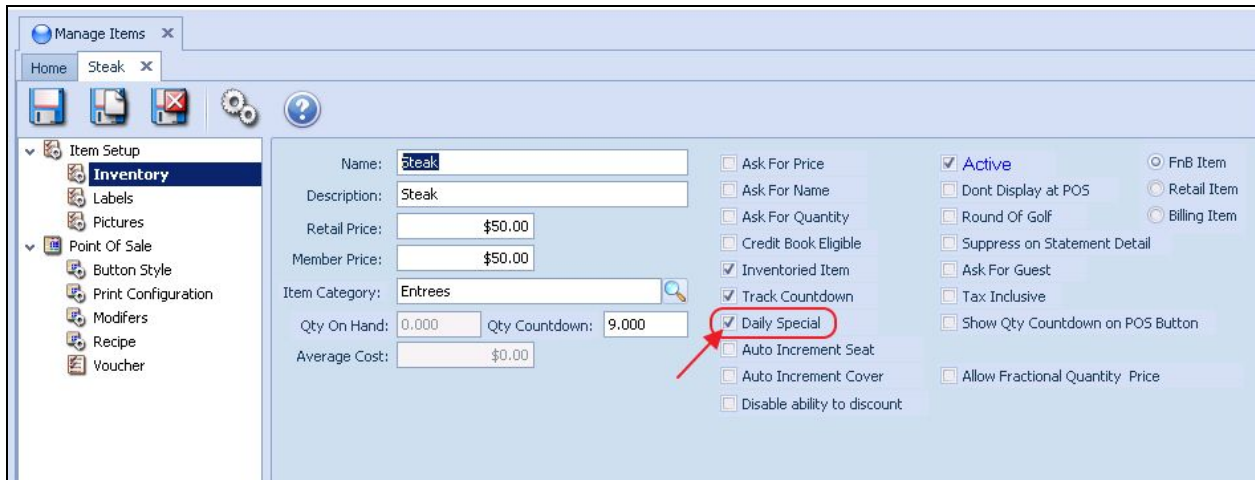
Menu: Main (highlighted), Appetizers, Beer, Btl of Wine, Fred's Burgers, Liqueur & Spec., Liquor A-J, Liquor

Sub-menu: Appetizers, Beer, Entrees, Dessert, Bar, Potato Skins, As a Meal, General Modifiers, Daily Specials (highlighted)

Menu: Main (highlighted), Appetizers, Beer, Btl of Wine, Fred's Burgers, Liqueur & Spec., Liquor A

Sub-menu: Filet Mignon Bites (10), Steak, Kobe Sliders, Mussel and Clam Ragout (highlighted)

Only Items marked as **"Daily Specials"** on the Item setup/edit form will display on this screen.

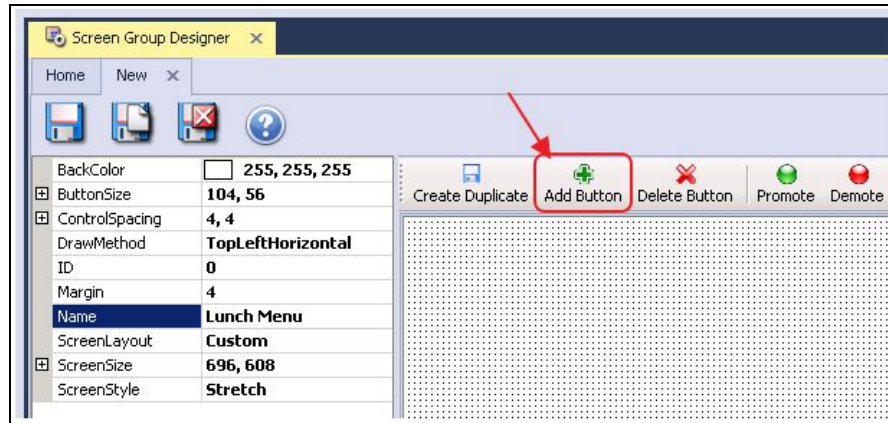


Please Note: For more information on **Items**, please see our [Items Manual](#).

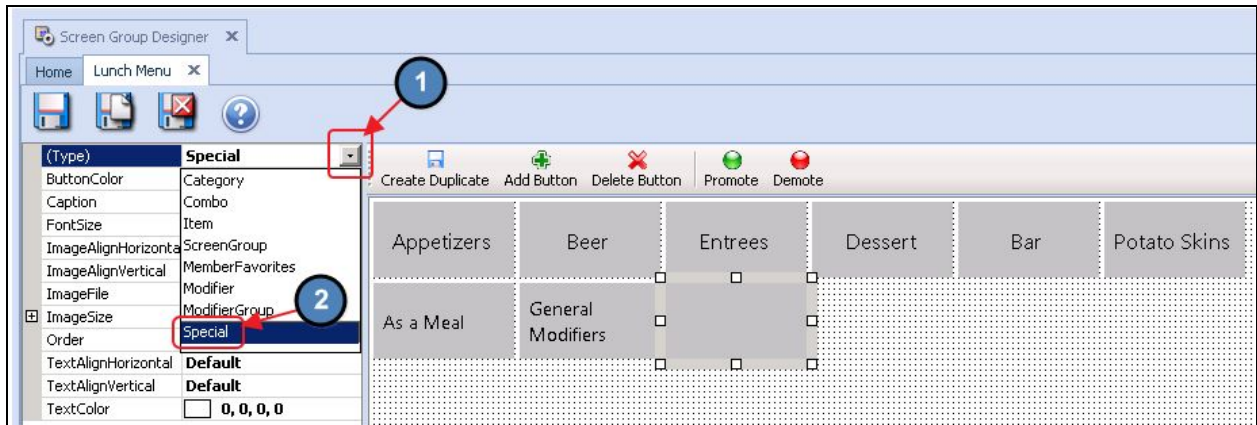
Creating a Daily Specials Button

To create a Daily Specials Button:

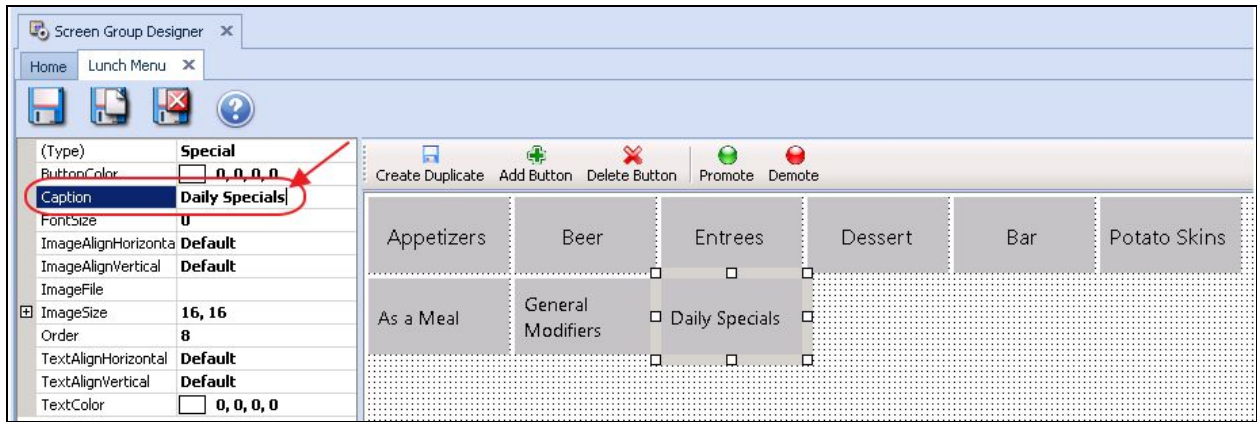
- 1) Select **Add Button**.



- 2) Select **Special** as the Button Type.

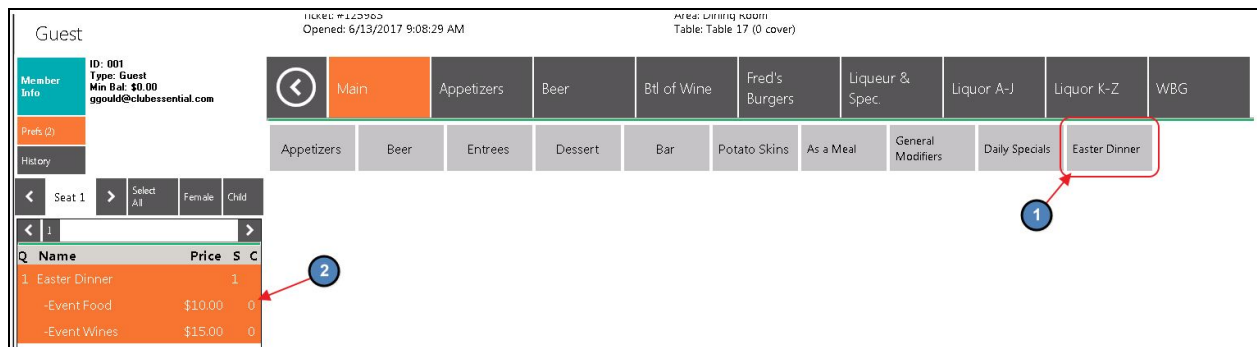


3) Enter the name you wish to have displayed on the POS button in the **Caption** box.



Item Combo Button

An **Item Combo Button** can be used to link a button directly to an individual Item Combo, such as Easter Dinner.

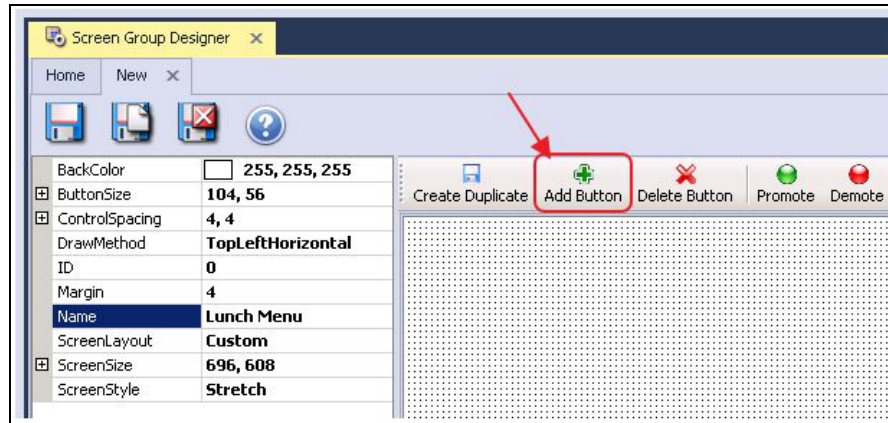


Item Combos allow users to sell multiple items with a single charge at the POS. For more information on Item Combos, please see our [Items Manual](#).

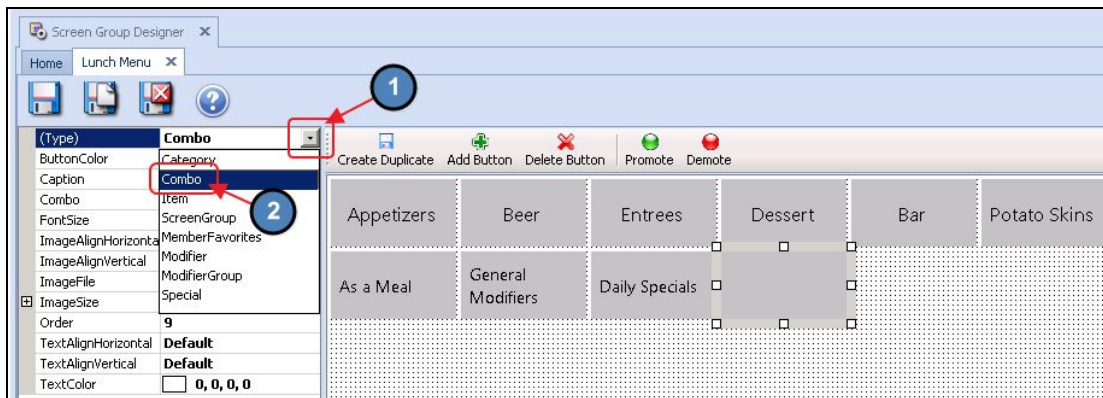
Creating an Item Combo Button

To create an Item Combo Button:

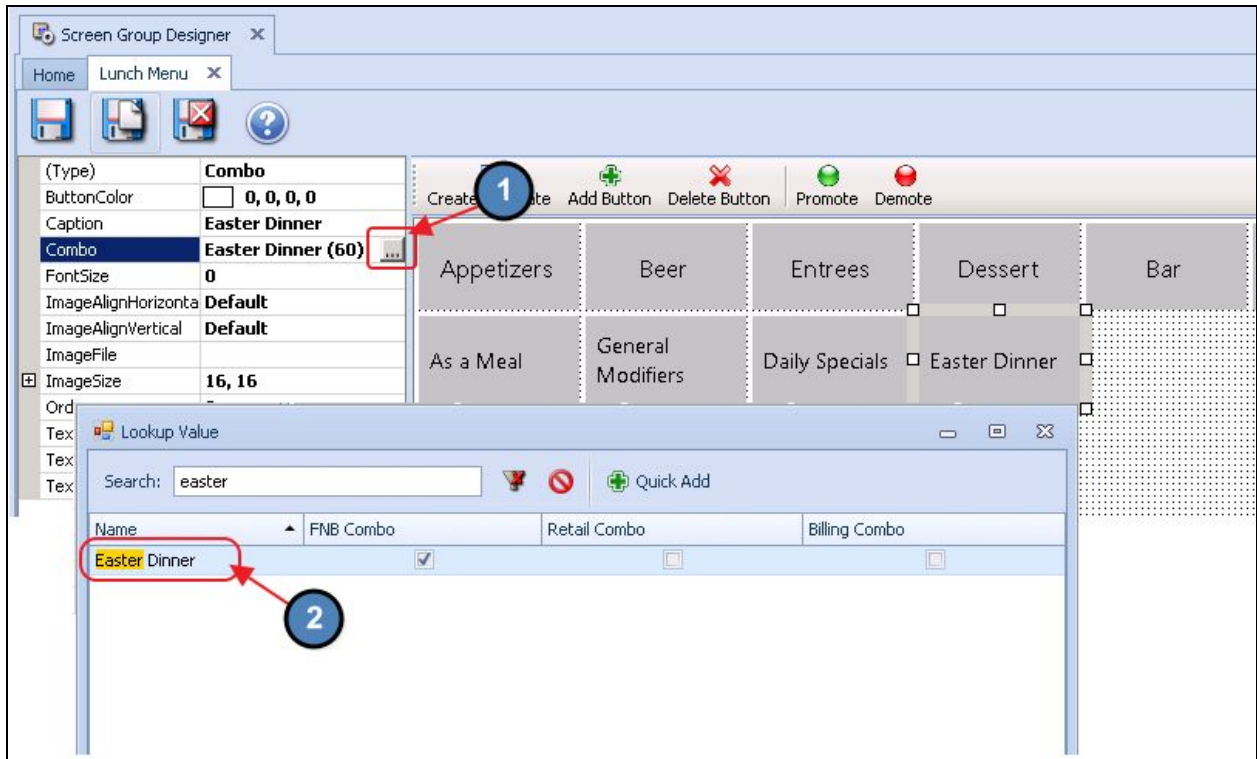
- 1) Select **Add Button**.



- 2) Select **Combo** as the Button Type.



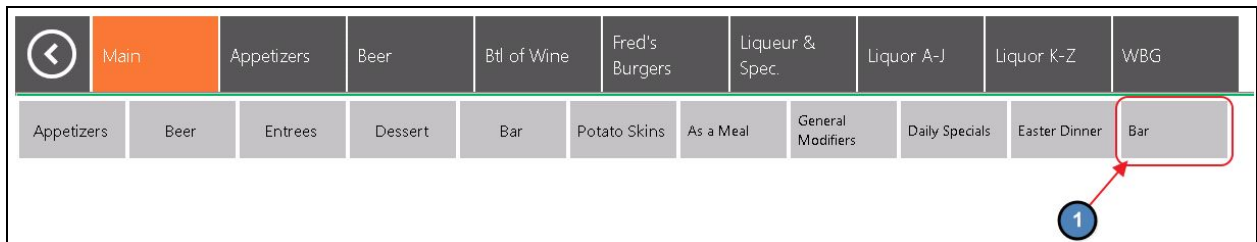
- 3) Select the **Combo** for which you'd like to create a button.



Screen Group Button

A **Screen Group Button** provides the wait staff with quick access to other Screen Groups/POS Menus used throughout the club.

For instance, many clubs will have a button on their **Main Dining Room Screen Group** that is linked to their **Bar Screen Group**. This allows the wait staff quick access to the Bar Menu while sales are still recorded in the Main Dining Room Area.

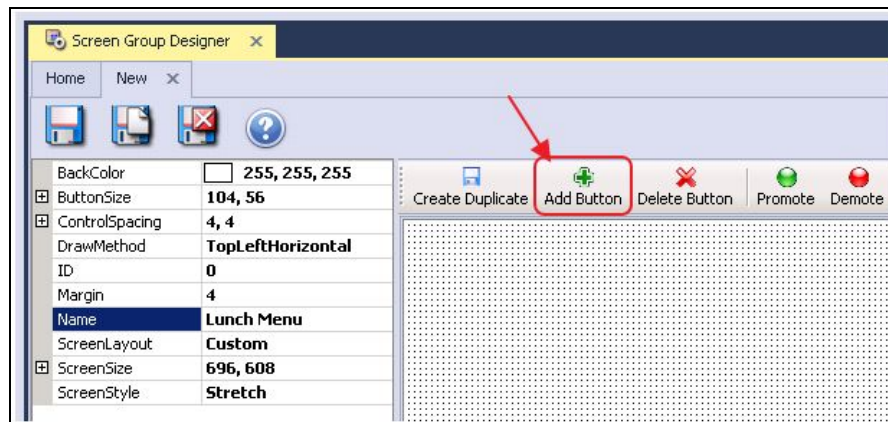




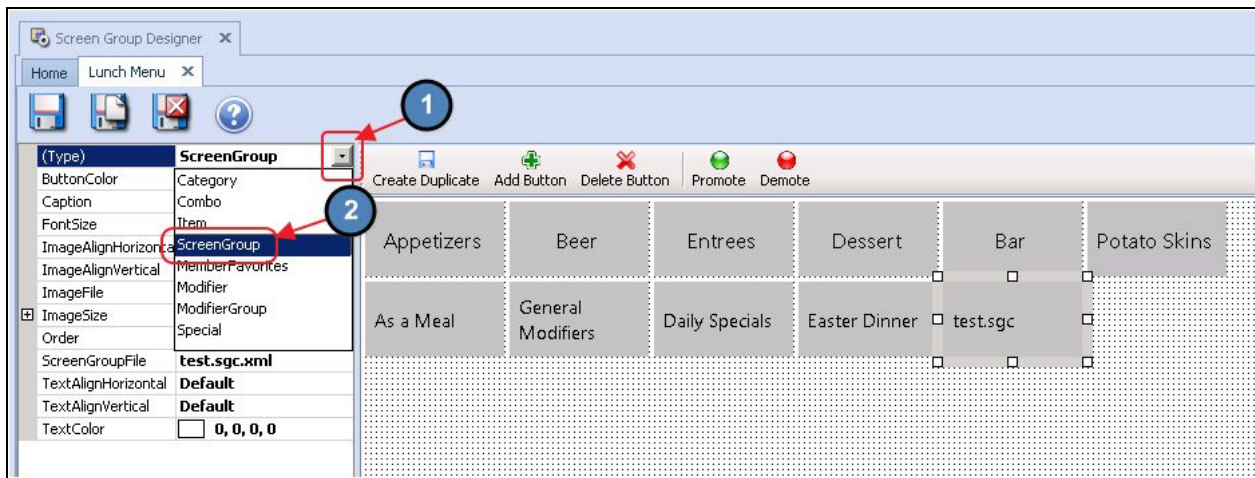
Creating a Screen Group Button

To create a **Screen Group Button**:

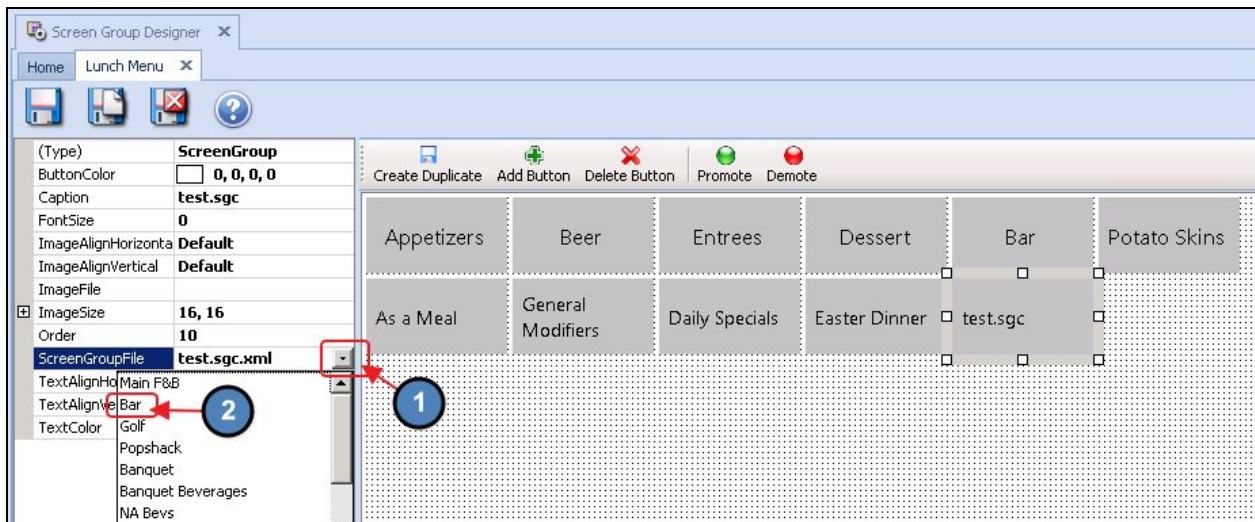
- 1) Select **Add Button**.



- 2) Select **Screen Group** as the Button Type.



3) Select the **Screen Group** for which you'd like to create a button.



Customizing Screen Groups

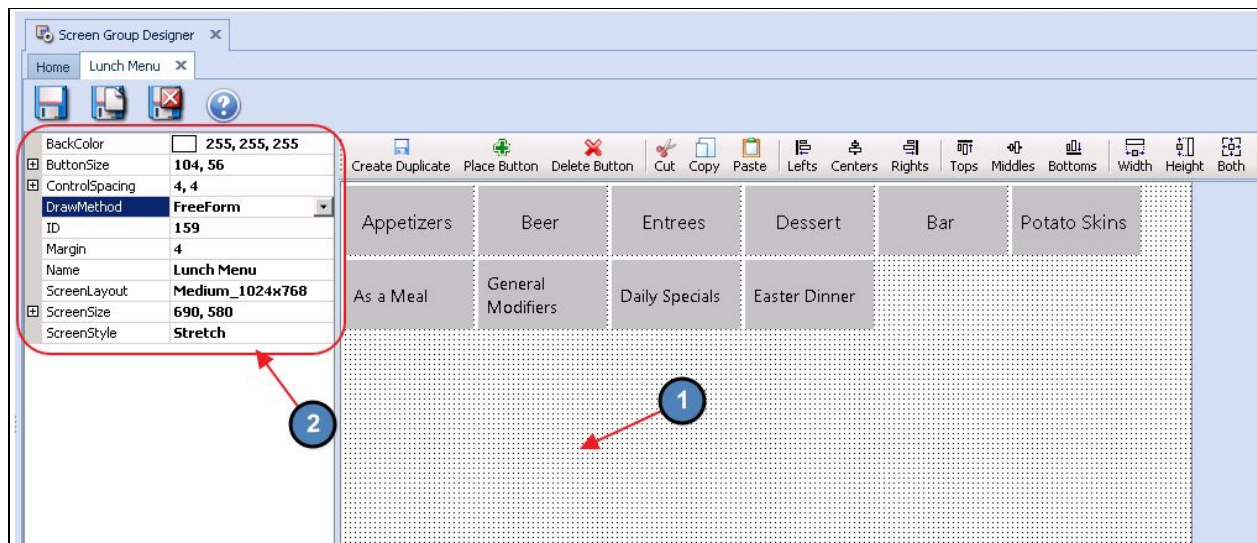
As previously mentioned, **Screen Group Buttons** can be customized in terms of their **position** on screen, **size**, **color**, and **font**. In this section we will discuss how to customize Screen Groups.

FreeForm

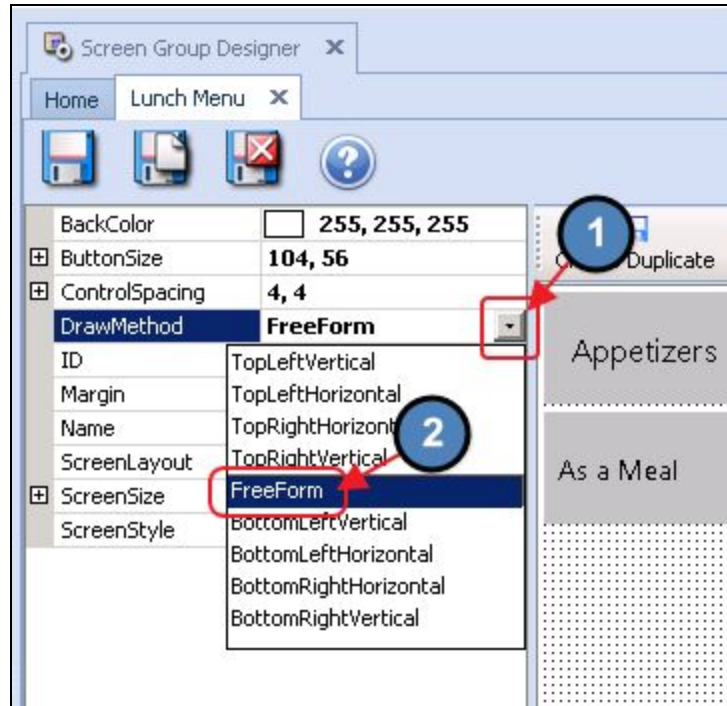
By default, new Screen Groups have their Draw Method set to **Top Left Horizontal**. In this Draw Method, Screen Group Buttons cannot be customized. Rather, buttons can only be added and their various Button **Types** applied.

To **Customize** Screen Groups, the Draw Method first needs to be set to **FreeForm**. Please see instructions below:

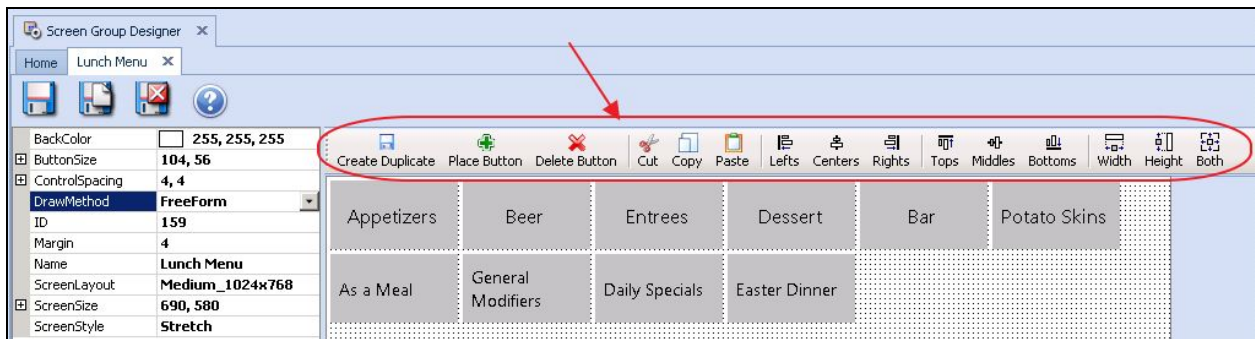
- 1) Click anywhere within the Screen Group to populate the **Screen Group edit form**.



- 2) Select **FreeForm** within the Draw Method section.



3) As you will see, additional customization **options** will populate.

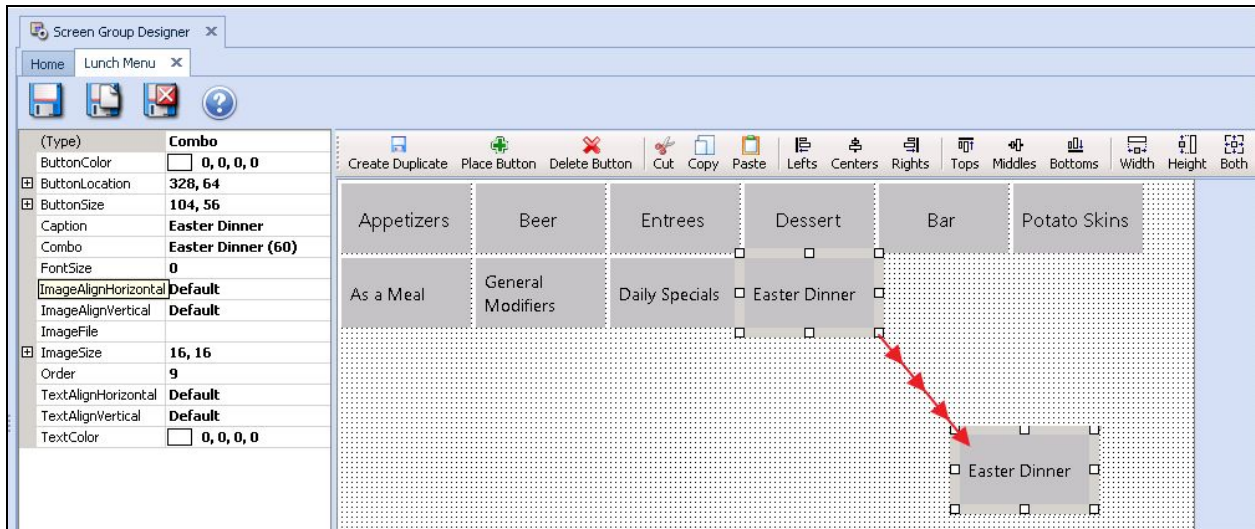


Please Note: When creating a new Screen Group, best practice is to add **ALL** buttons to the Screen Group in the **TopLeftHorizontal** Draw Method first and **then** customize button size, color, etc.

Button Positioning

Once a Screen Group's Draw Method is changed to Freeform, the **positioning** of the various buttons can be customized.

Click to select the button you wish to reposition, and **drag** the button to the desired position.

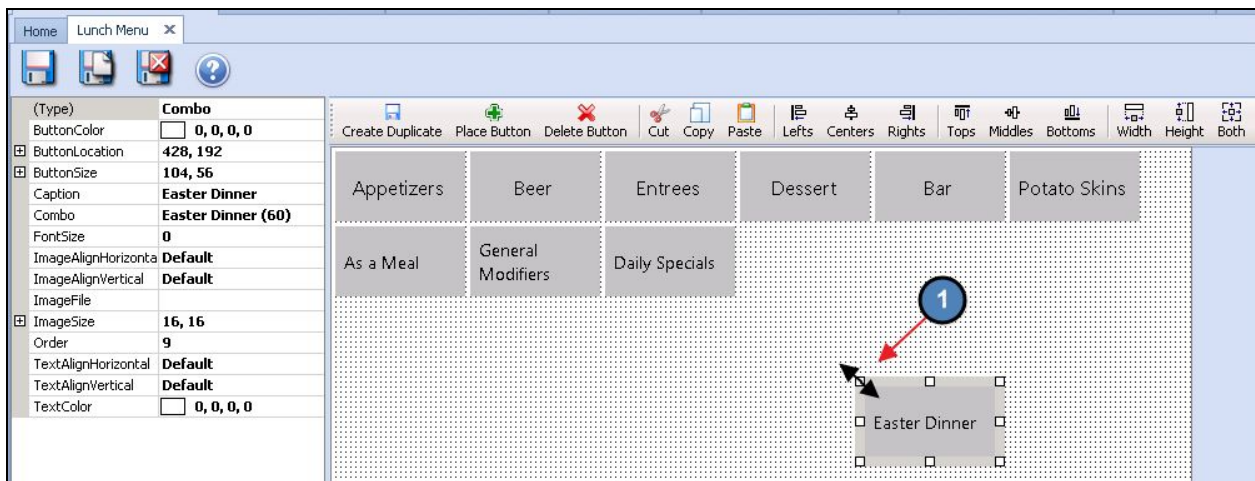


Button Size

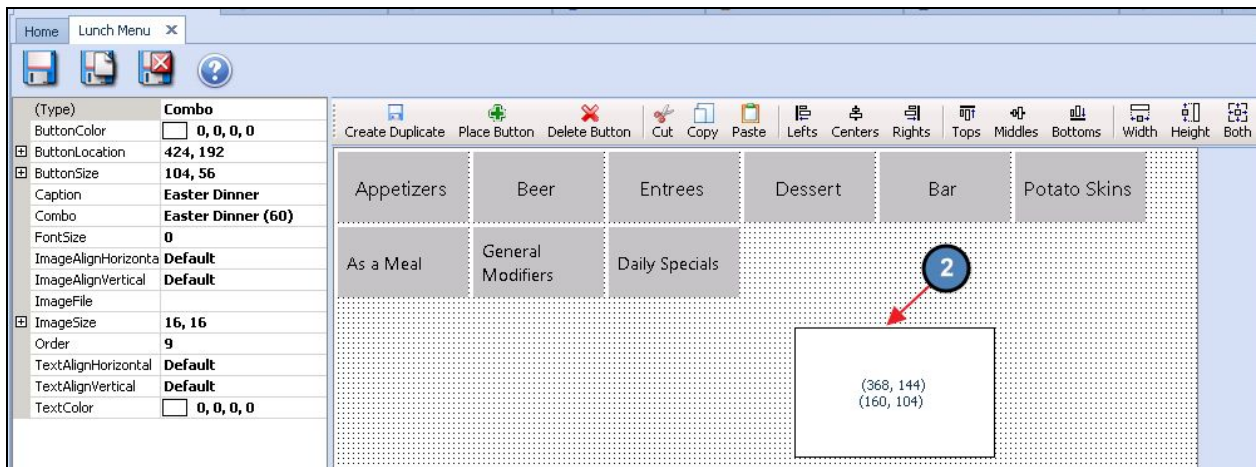
In FreeForm, a button's **size** can also be customized.

To change the size of a button:

- 1) **Click and hold** your mouse on either corner of the button.



- 2) Then, **drag** the button to the desired size.

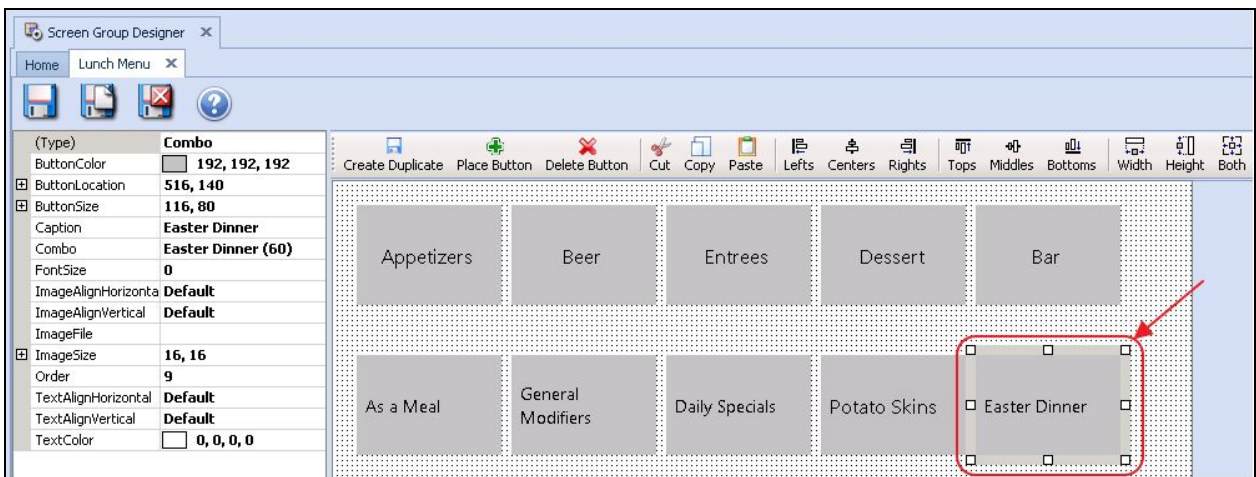


Button Color

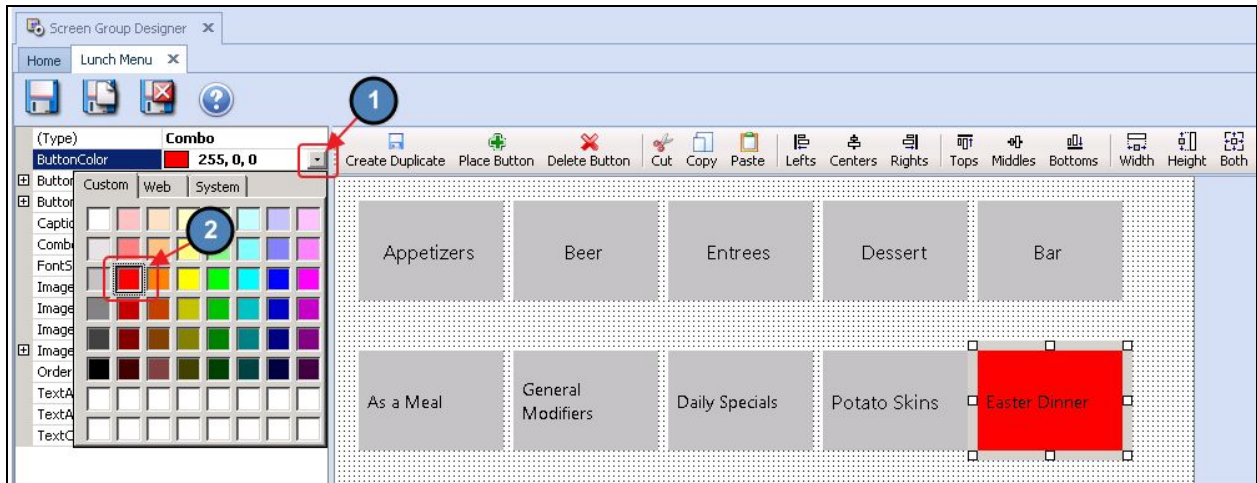
A button's **color** can also be customized.

To customize the color of a button:

- 1) **Click** to select the applicable button.



- 2) Navigate to the **Button Color** section and select the desired color.



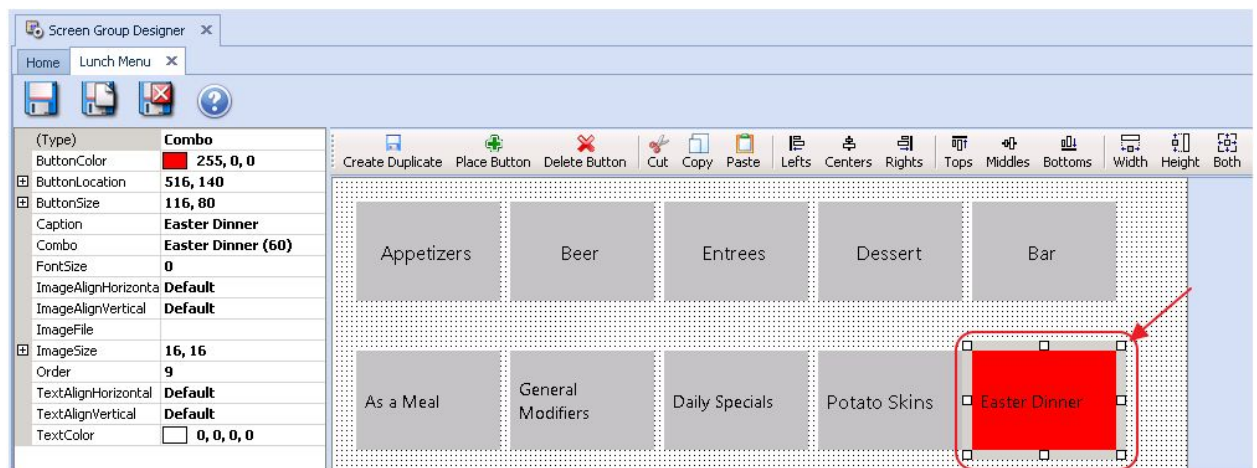
Button Font

A button's font size, text color, and text alignment can also be customized in FreeForm.

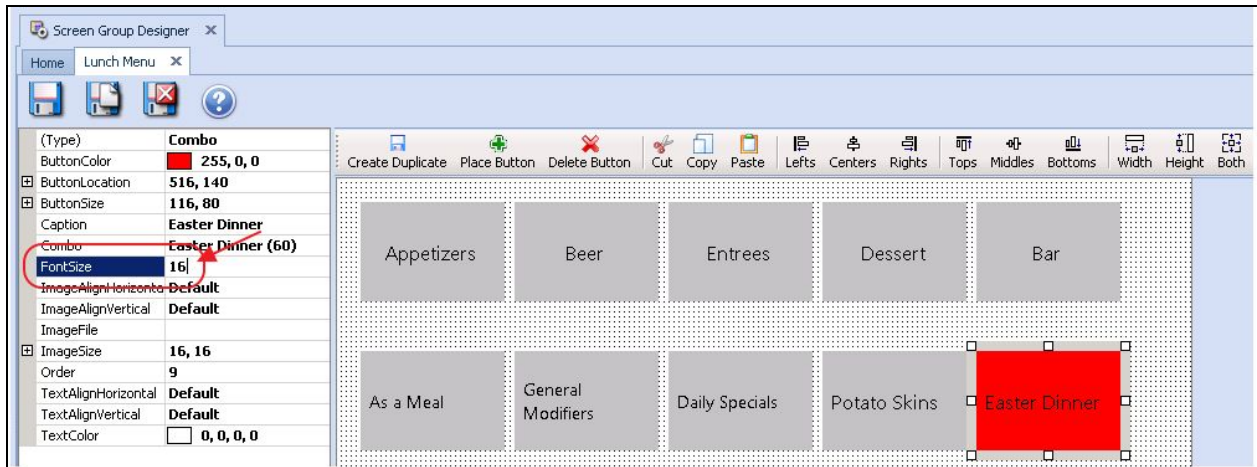
Font Size

To customize the **font size** of a button:

- 1) **Click** to select the applicable button.



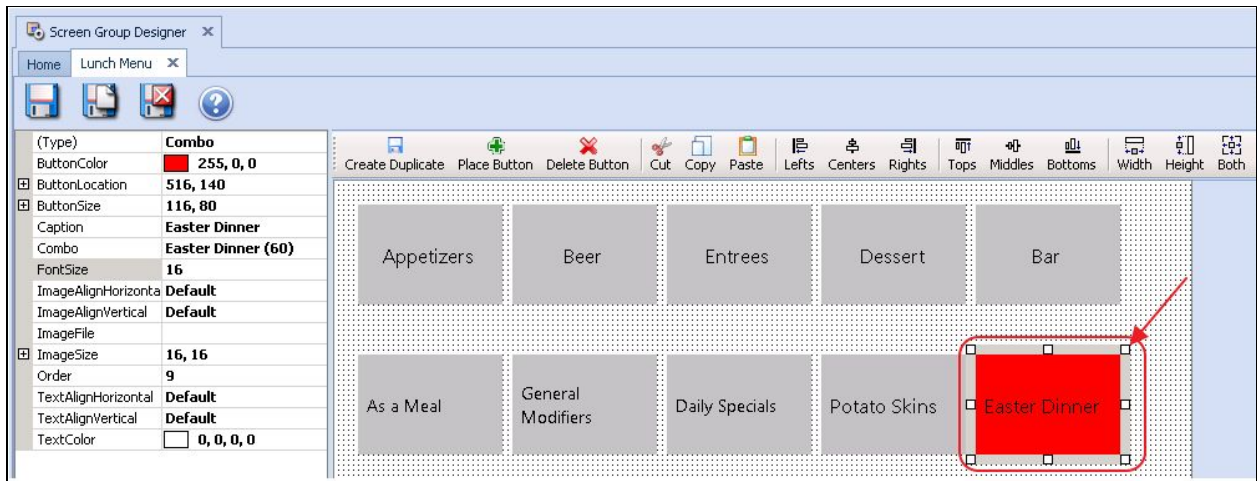
- 2) Navigate to the **Font Size** section and enter the desired font size.



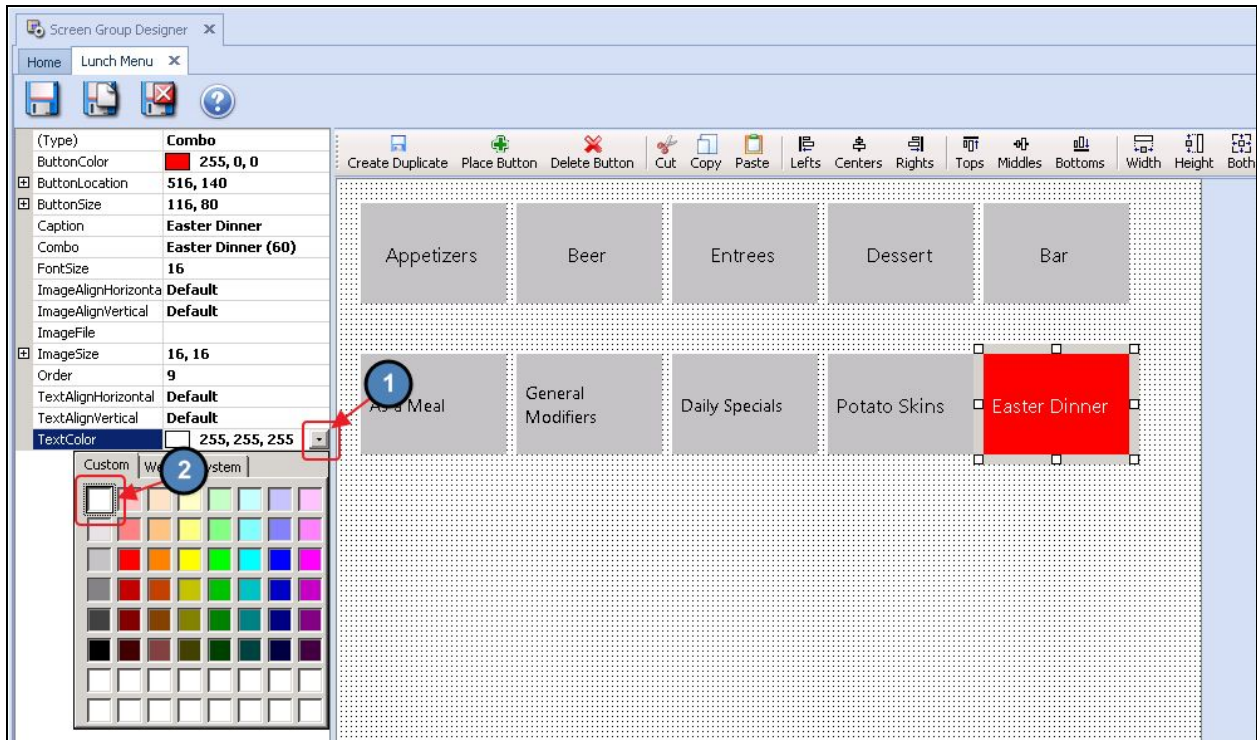
Text Color

To customize a button's text color:

- 1) **Click** to select the applicable button.



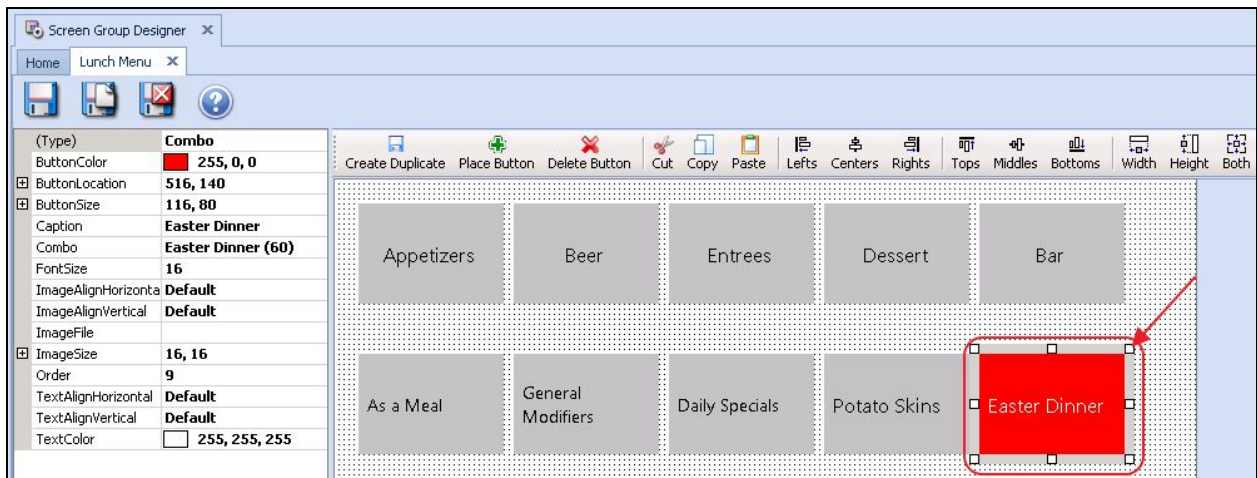
- 2) Navigate to the **Text Color** section and select the desired text color.



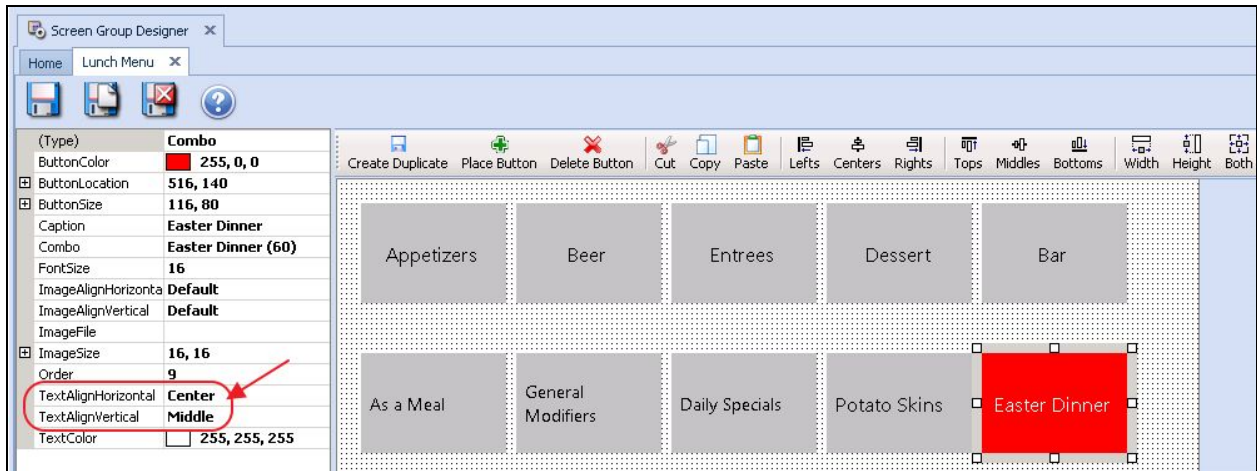
Text Alignment

To customize a button's **text alignment**:

- 1) **Click** to select the applicable button.



- 2) Navigate to the **TextAlignHorizontal** or **TextAlignVertical** section and select the desired alignment.

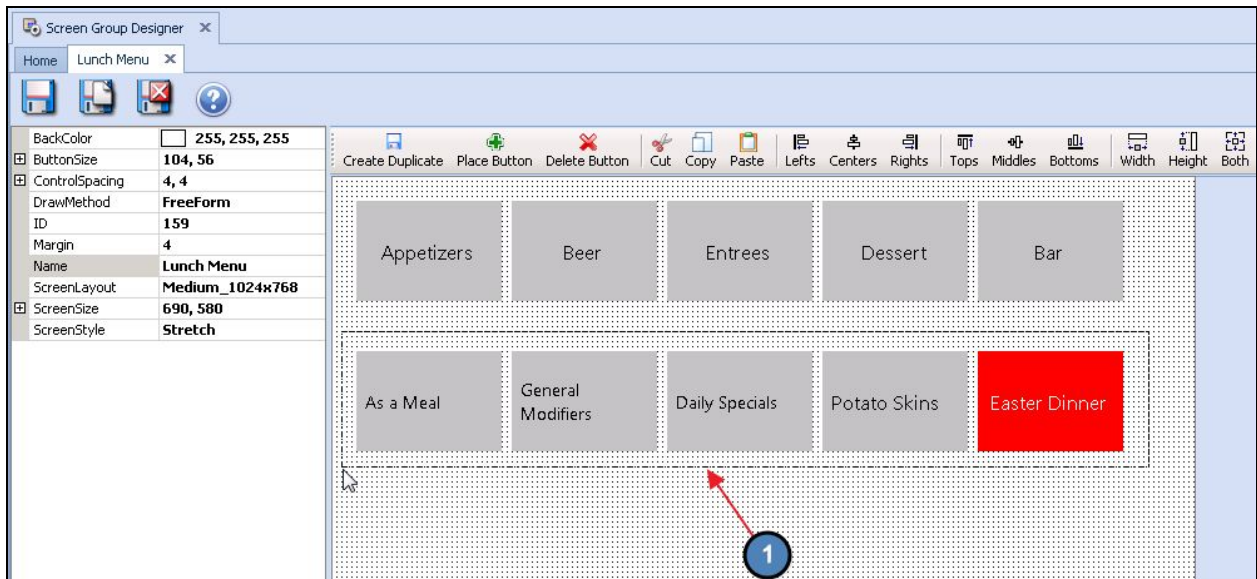


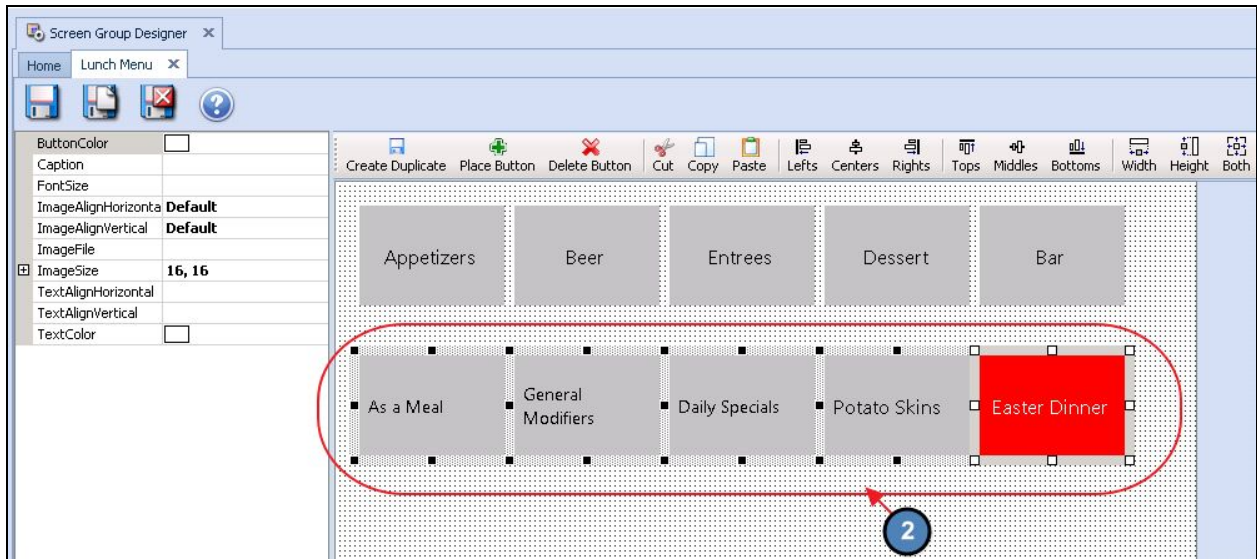
Multi-Edit

It is also possible to edit **multiple** buttons at the same time. It is possible to select an array of buttons and change their button color, font size, text color, button size, etc. at the same time. Please see examples below:

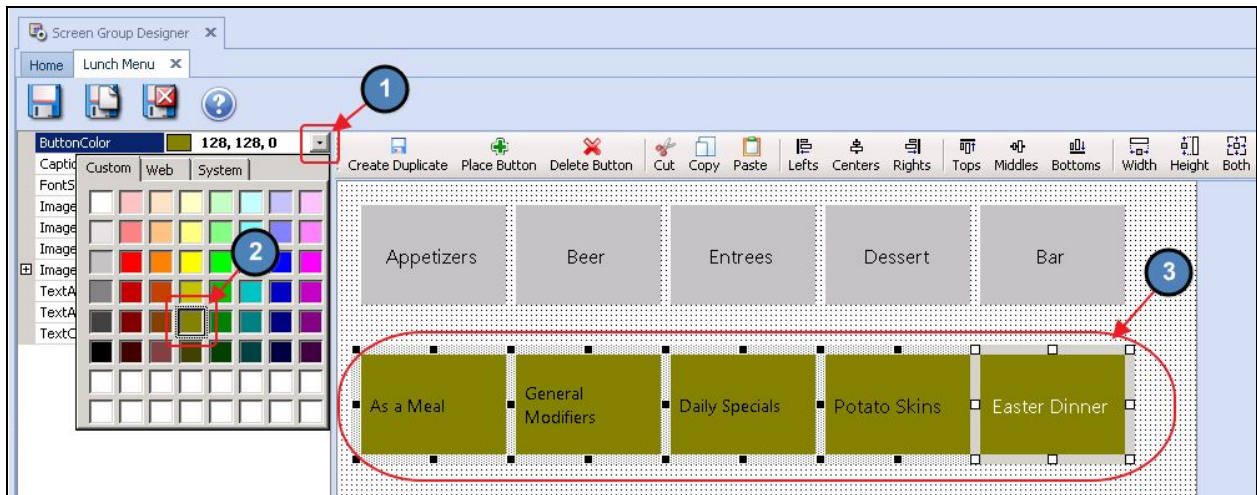
Button Color

- 1) **Click and hold** the mouse. While holding the mouse, start **dragging** your cursor. As you'll notice, a selection box will begin to take shape. Any button touching this box will instantly be selected.





- 2) Navigate to the **Button Color** section and choose the desired color to be applied to all selected buttons.

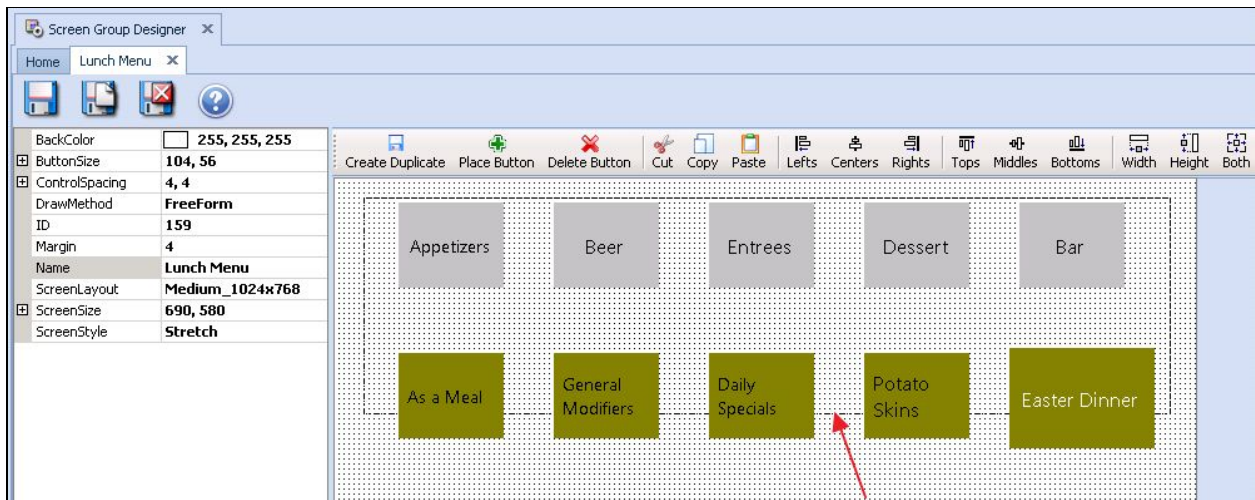


Button Size

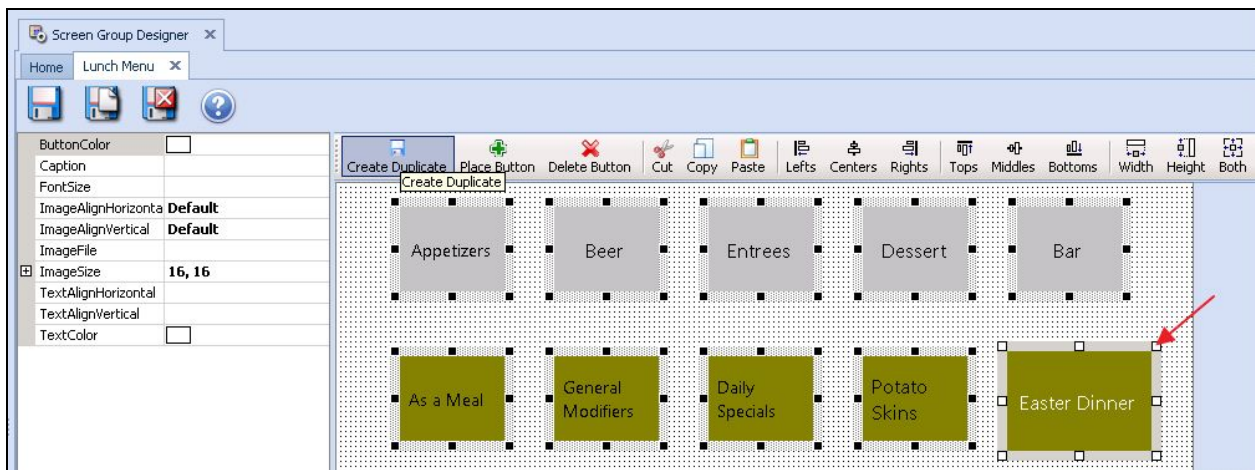
To ensure all buttons on the Screen Group are the **same size**, the user can select an array of buttons as described above and essentially copy the format of any existing button.

To change the **size** of an array of buttons at the same time:

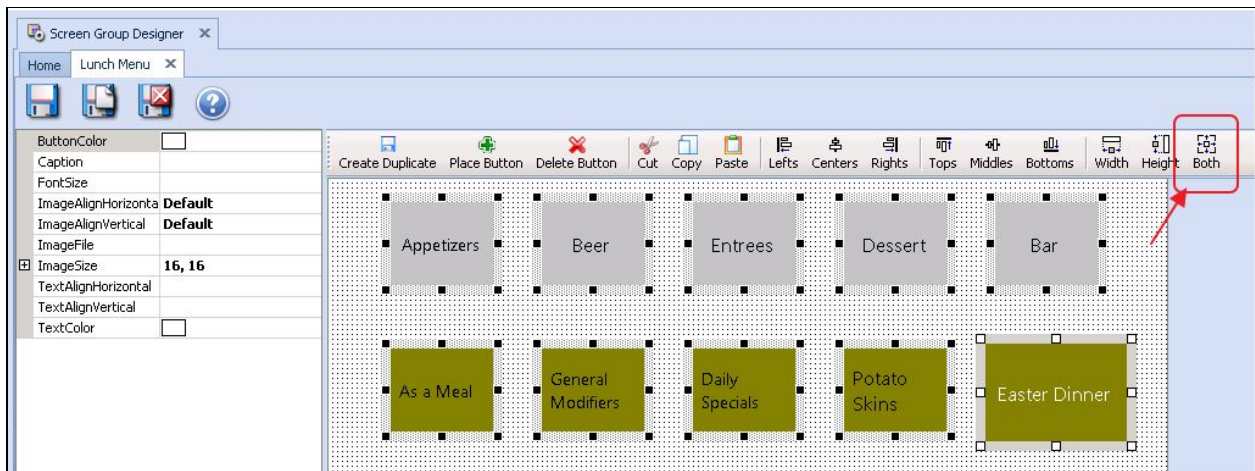
- 1) **Select** the array of buttons you would like to be the same size.



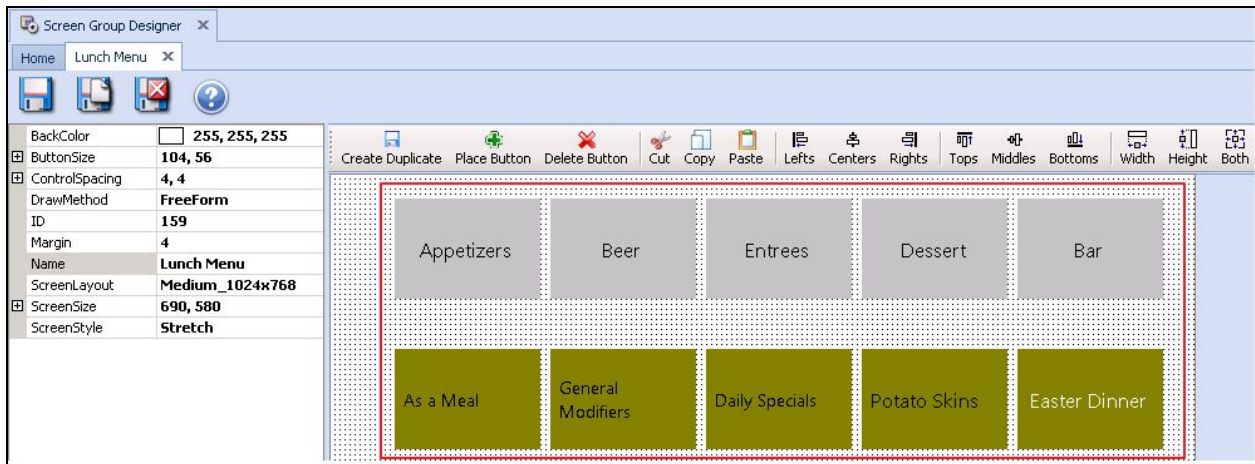
- 2) Select the button you would like all other buttons to be the same size as. This is known as the **Selected Button**, and will have a white border around the button that is currently selected.



- 3) Select **Both** on the top toolbar. This will copy both the Width and Height of the Selected Button to the rest of the selected array.



4) Now, all buttons within the selected array are the same size.



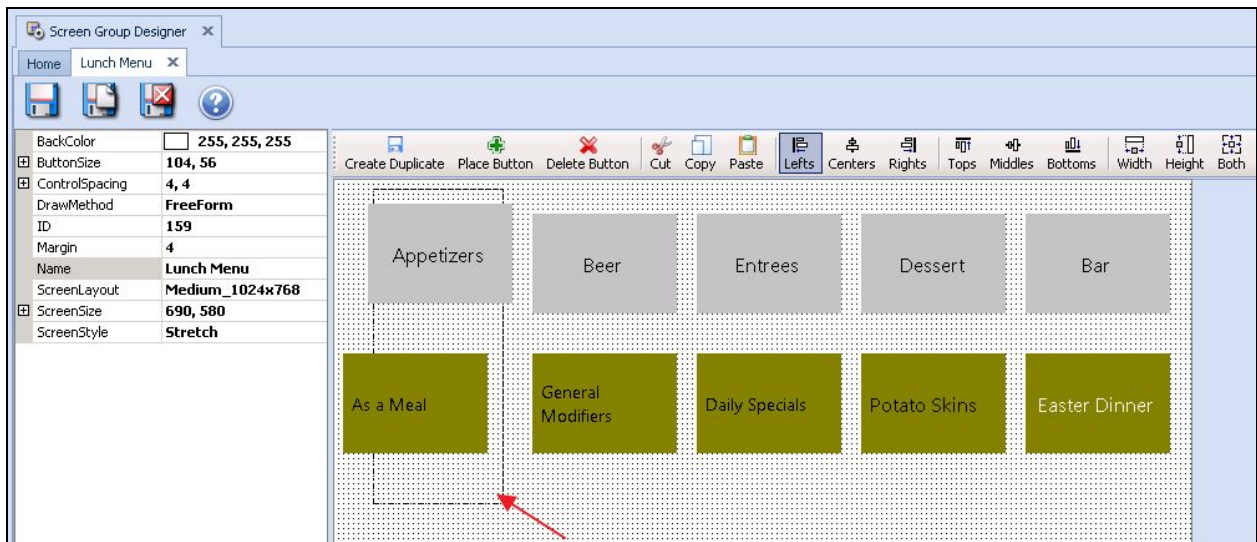
Button Alignment

The Multi-Edit feature can also be used to **align** buttons within a Screen Group. Users can select an array of buttons and copy the **left**, **right**, **top**, or **bottom** alignment of an existing button. Please see examples below:

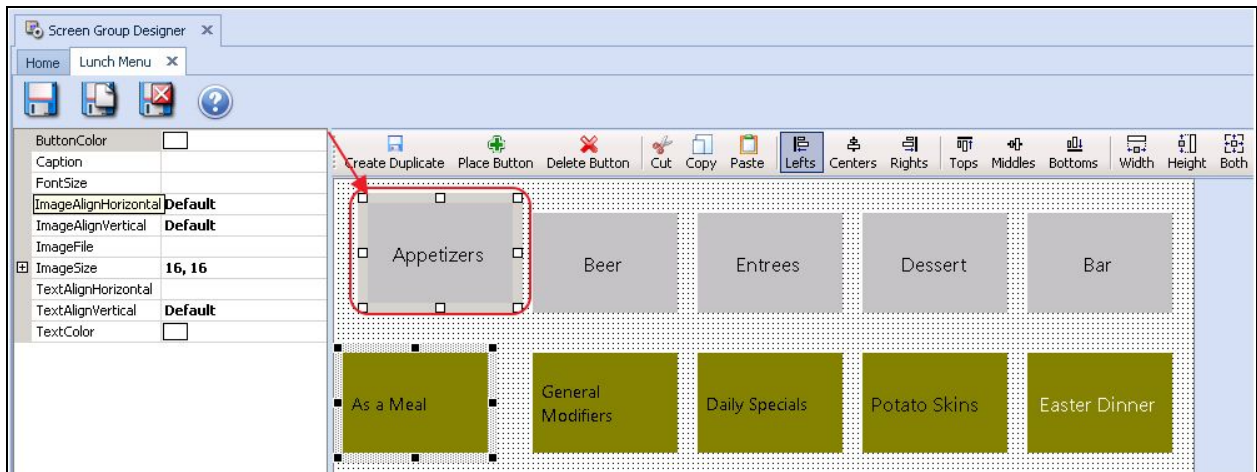
Left Alignment

To **align** buttons to the left:

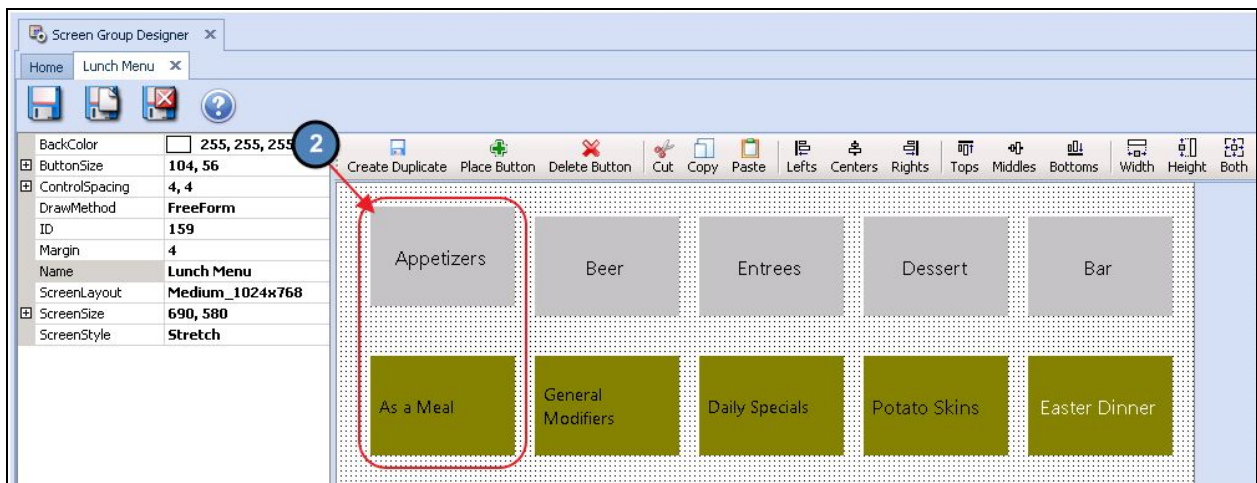
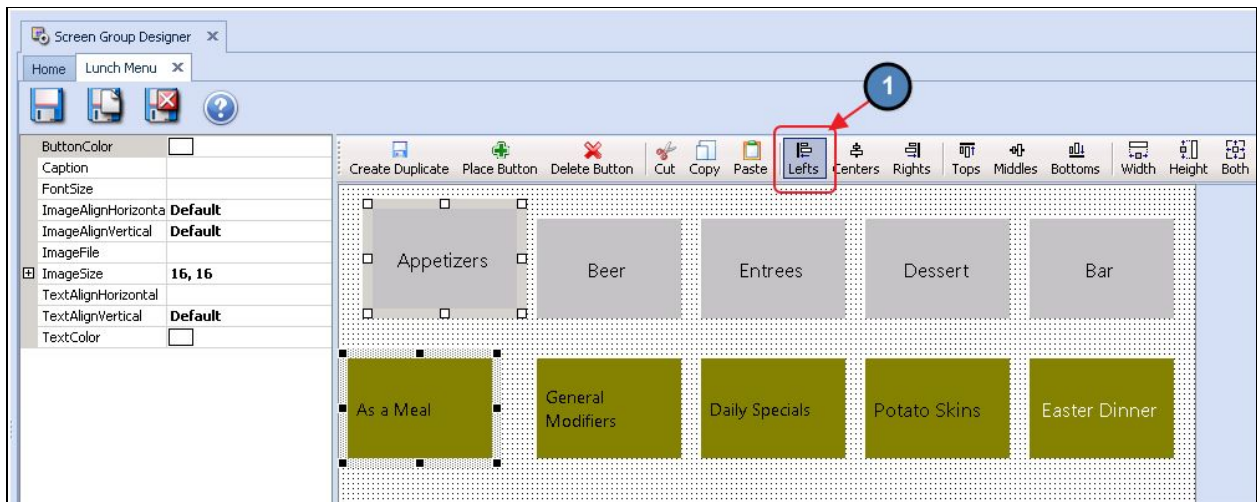
- 1) Select the array of button you would like to align.



- 2) Click to select the button you would like all buttons within the selected array to be aligned with. Again, this is known as the **Selected Button**.



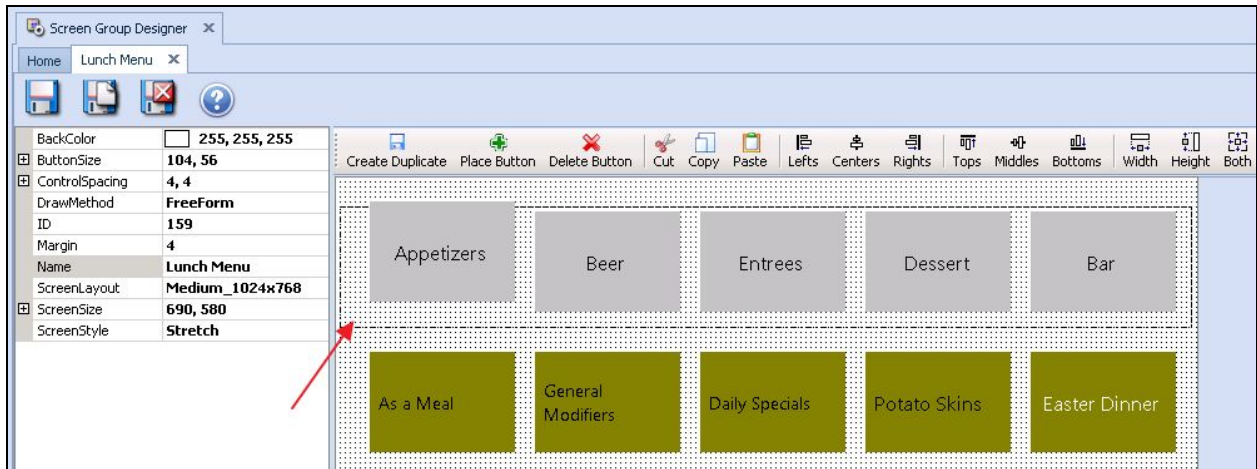
- 3) Next, select **Lefts** on the top toolbar. This will align each button within the selected array to the left of the Selected Button.



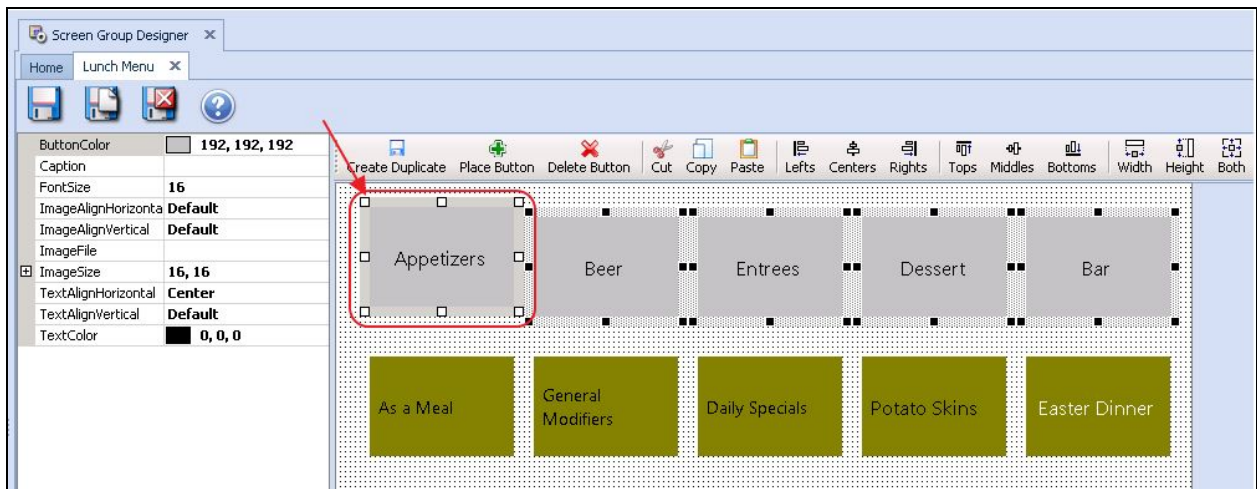
Top Alignment

To **align** buttons to the top of another button:

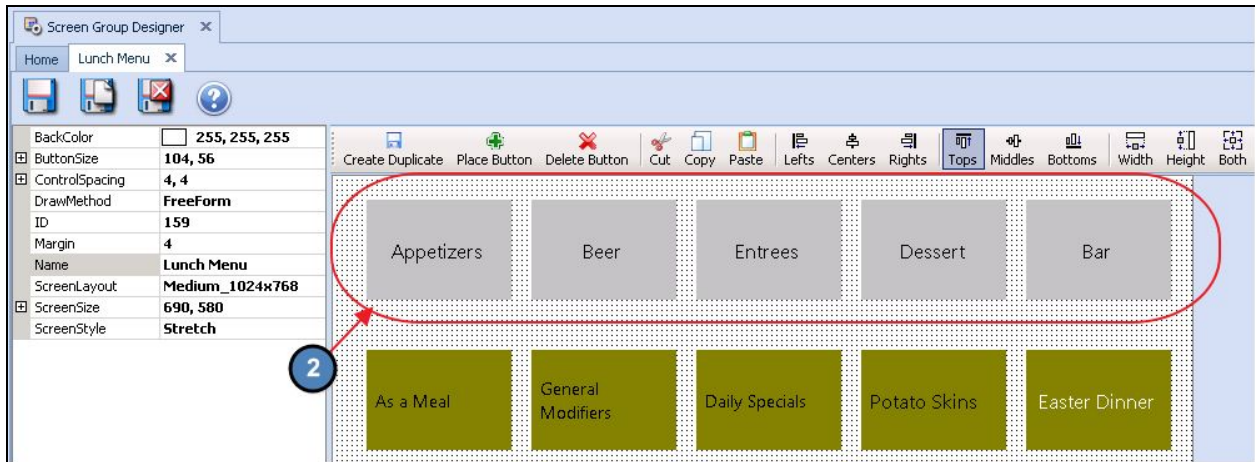
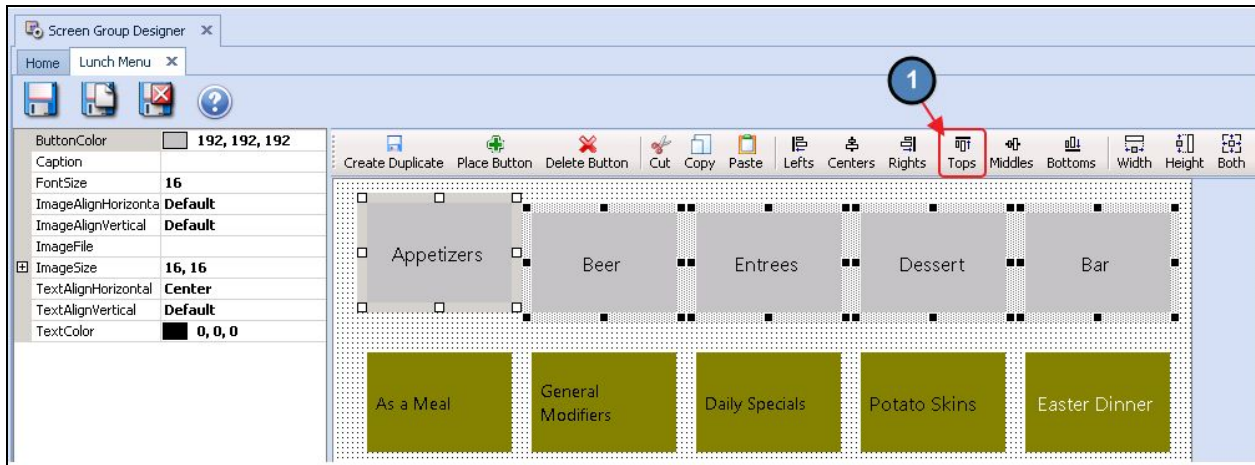
- 1) Select the array of buttons you would like to align.



- 2) **Click** to select the button you would like all buttons within the selected array to be aligned with.



- 3) Next, select **Tops** on the top toolbar. This will align each button within the selected array to the top of the Selected Button.



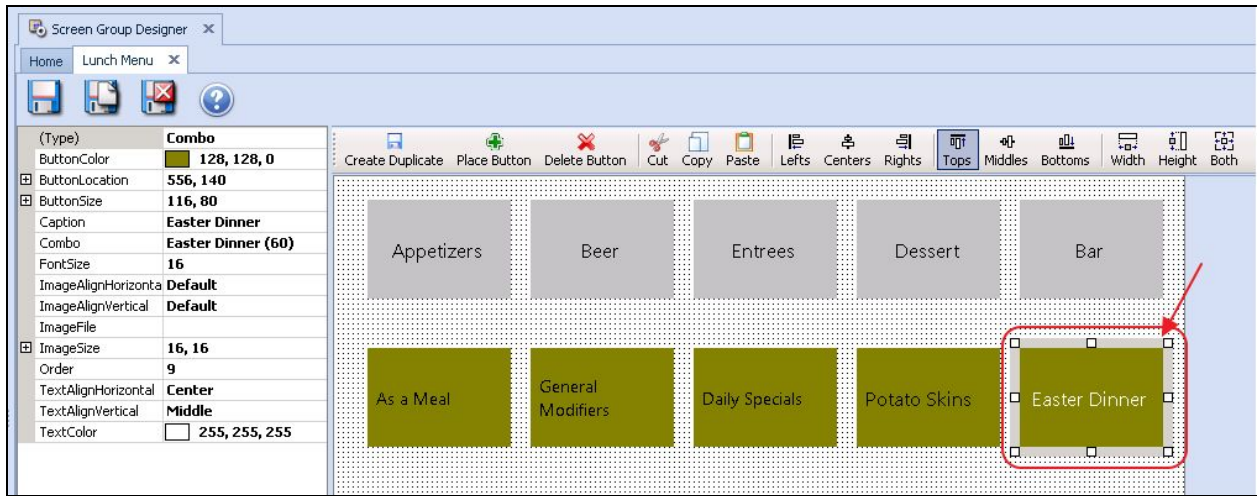
Adding a New Button in FreeForm

When adding a new button in FreeForm the best practice is to **Copy and Paste** an existing button to ensure the new button is the same size as existing buttons.

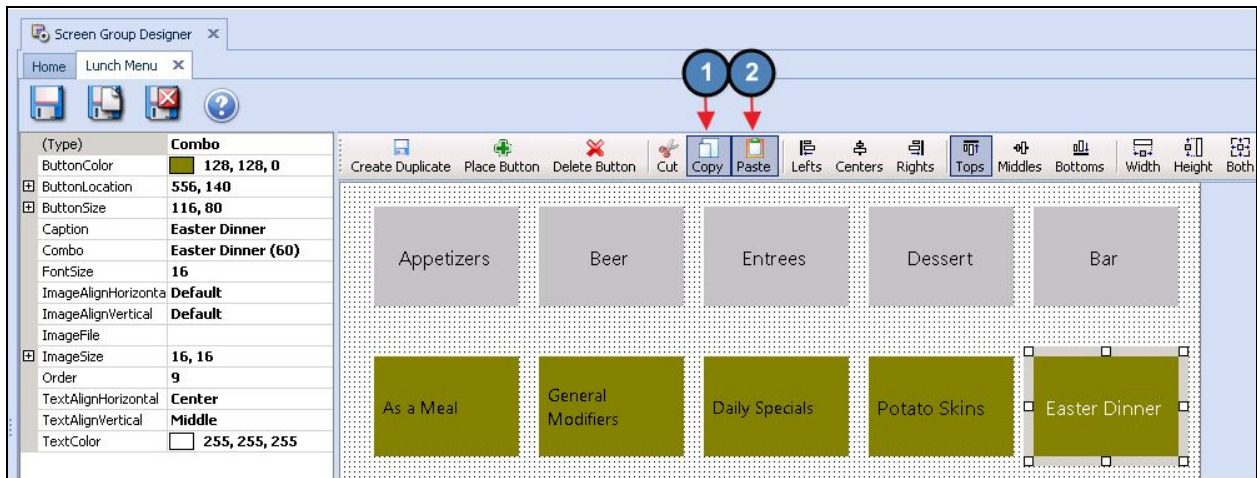
Otherwise, the user would have to use the Place Button option and draw out their new Button.

To create a **new** button in **FreeForm**:

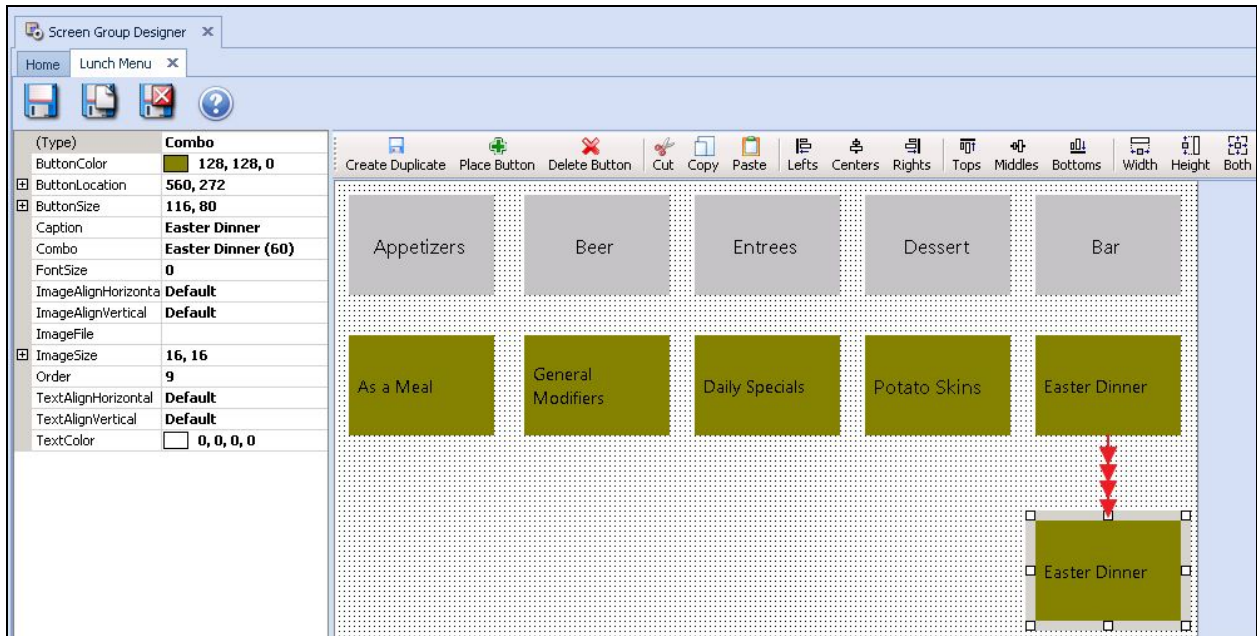
- 1) **Select** the button in which you would like the new button to be the same size as.



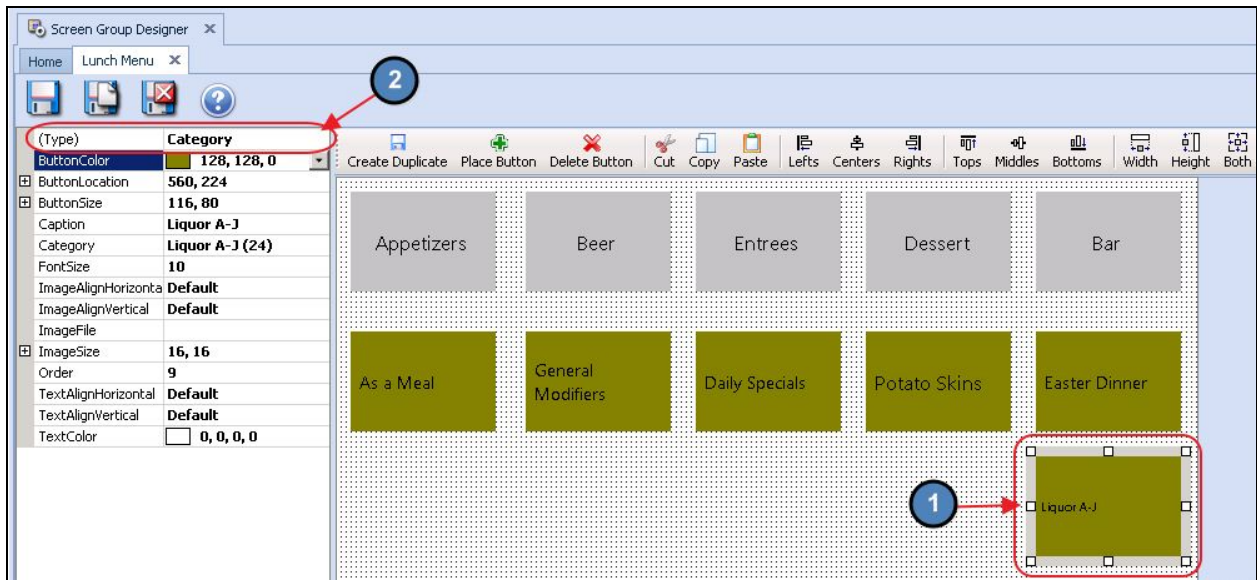
2) Select **Copy** on the top toolbar and then select **Paste**.



3) The new button will be pasted directly on top of the existing button. Select the new button and simply drag to the desired location.



4) Next, proceed to **adjust** the Button Type, color, etc. according to the user's needs.

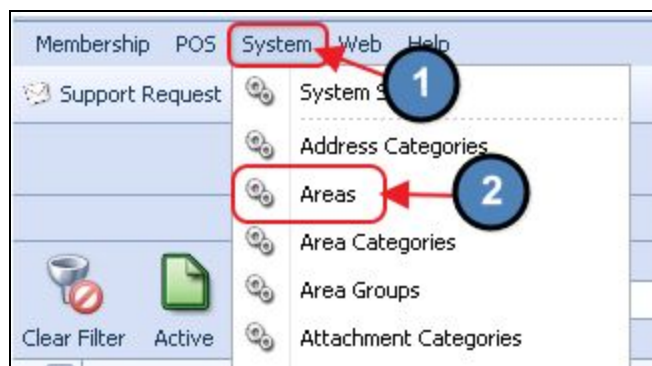


Applying a Screen Group to an Area

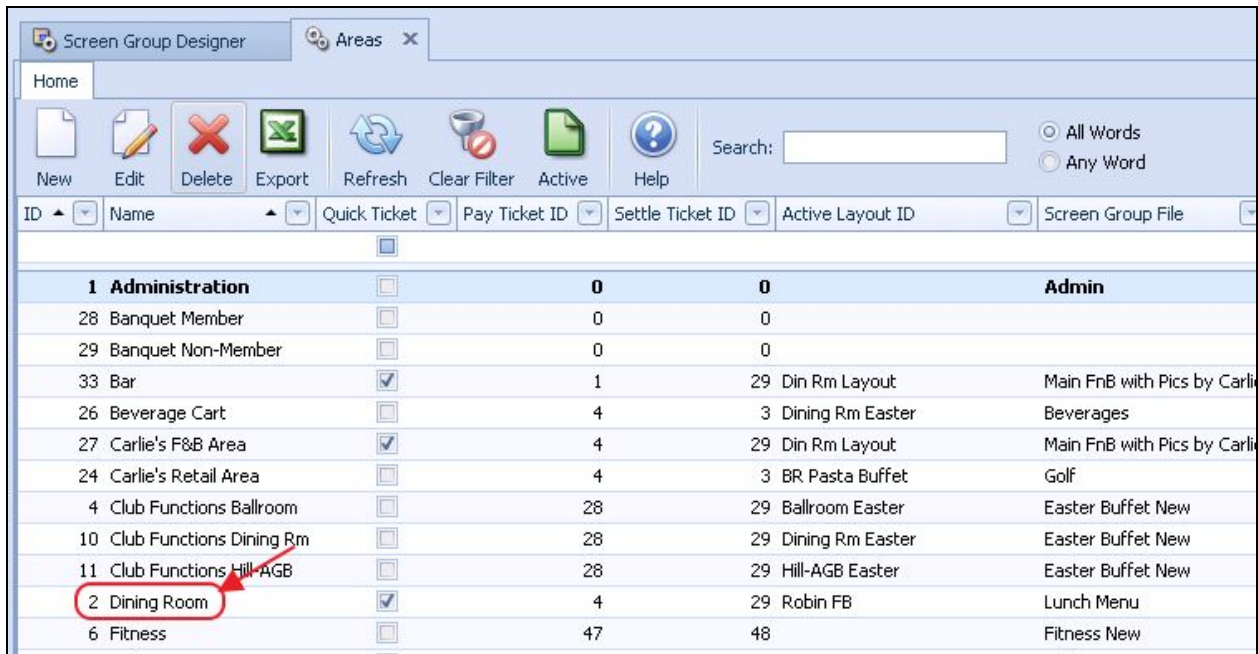
For a **Screen Group** to show in the **POS**, it has to be **applied** to an Area. Once the Screen Group is applied, this Screen Group will show by default when users access the **Area** in the POS.

To apply a **Screen Group** to an **Area**:

- 1) Select **System** across the top toolbar and choose **Areas**.

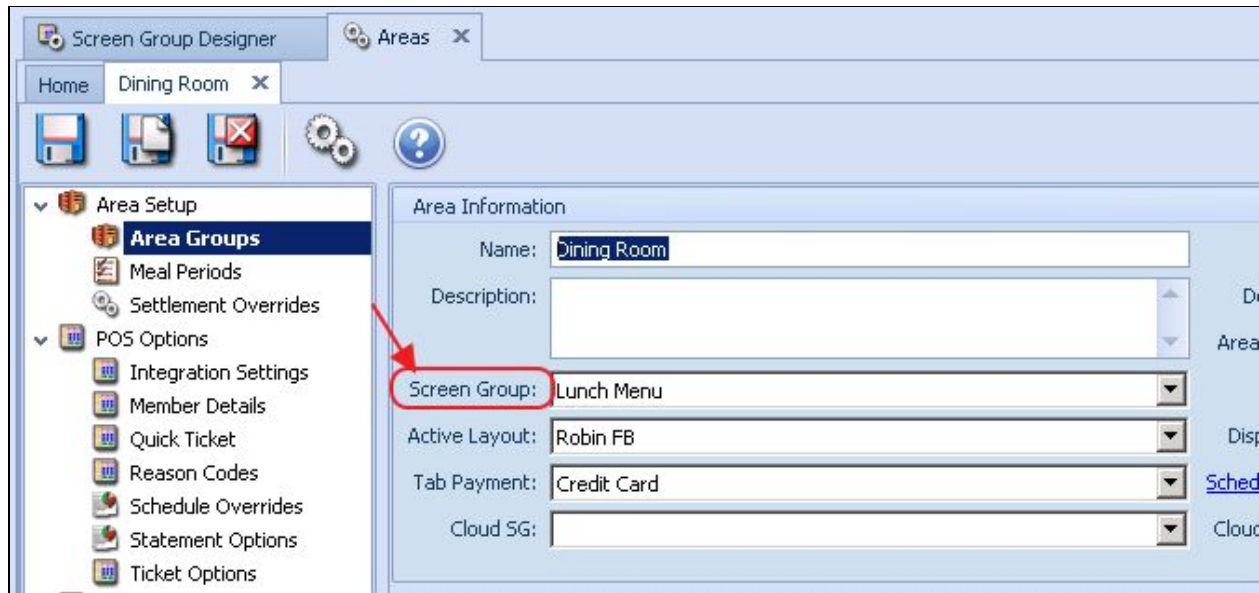


- 2) Select the applicable **Area**.

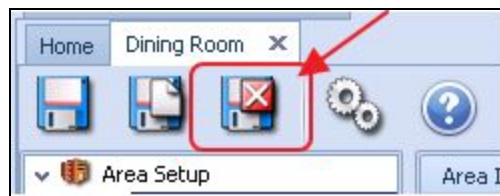


ID	Name	Quick Ticket	Pay Ticket ID	Settle Ticket ID	Active Layout ID	Screen Group File
1	Administration	<input type="checkbox"/>	0	0		Admin
28	Banquet Member	<input type="checkbox"/>	0	0		
29	Banquet Non-Member	<input type="checkbox"/>	0	0		
33	Bar	<input checked="" type="checkbox"/>	1	29	Din Rm Layout	Main FnB with Pics by Carli
26	Beverage Cart	<input type="checkbox"/>	4	3	Dining Rm Easter	Beverages
27	Carlie's F&B Area	<input checked="" type="checkbox"/>	4	29	Din Rm Layout	Main FnB with Pics by Carli
24	Carlie's Retail Area	<input type="checkbox"/>	4	3	BR Pasta Buffet	Golf
4	Club Functions Ballroom	<input type="checkbox"/>	28	29	Ballroom Easter	Easter Buffet New
10	Club Functions Dining Rm	<input type="checkbox"/>	28	29	Dining Rm Easter	Easter Buffet New
11	Club Functions Hill-AGB	<input type="checkbox"/>	28	29	Hill-AGB Easter	Easter Buffet New
2	Dining Room	<input checked="" type="checkbox"/>	4	29	Robin FB	Lunch Menu
6	Fitness	<input type="checkbox"/>	47	48		Fitness New

- 3) Navigate to the **Screen Group** section and select the applicable Screen Group.



- 4) Select **Save & Close**



Common Questions and Concerns

Q: What is the Draw Method?

A: The Draw Method organizes the buttons in the selected Screen Group by the type of alignment preferred.

Options include, Top Left Vertical, Top Right Horizontal, Top Right Vertical, [Free Form](#), Bottom Left Vertical, Bottom Left Horizontal, Bottom Right Horizontal. and Bottom Right Vertical.

Q: How do I create the Item Combo I want to link with a button?

A: While **Item Combos** allow users to sell multiple items with a single charge at the POS, they must be created prior to being assigned to a button. For more information on Item Combos, please see our [Items Manual](#).

Best Practices

1. When adding a new button in FreeForm, Copy and Paste the existing button to ensure the new button is the same size as existing buttons.
2. When creating a new Screen Group, best practice is to add **ALL** buttons to the Screen Group in the **TopLeftHorizontal** Draw Method first and **then** customize button size, color, etc.
3. Some Clubs find it useful to add buttons for frequently ordered Items, such as Diet Coke on their home screens. For more information on Items, please see our [Items Manual](#).