



Aldelo[®] For Restaurants[™]

User Guide

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Introduction

Aldelo® For Restaurants software solution covers your restaurant operations with a full array of features. Whether you are looking to automate your order entry and cash register procedures, prevent employee mistakes, prevent cash drawer shortages, improve inventory tracking, start offering in-house charge accounts, start offering a frequent diner program, or start tracking customer sales history, you have chosen the right solution for the job!

Aldelo® For Restaurants software solution is affordable and feature rich. Besides the being a full-featured restaurant point of sale system, the following features are also included at no additional cost:

- Inventory Management Module with Auto Depletion By Sales Capability
- Gift Certificate Sales, Tracking, and Redemption Module
- Customer Credit Voucher, Tracking, and Redemption Module
- In-House Charge Account and Billing Statement Creation Module
- Frequent Diner Module with Customized Automatic Reward Creation
- Microsoft® MapPoint 2004™ Mapping Software Integration
- Up to 8 line Caller ID Monitoring
- Full featured Reservation and Waiting list Module.
- Staff and Customer Paging
- Video Surveillance Snapshot Feature
- Localization Manager with 100% Multilingual Support
- Quick Service Screen for Fast Food Operations
- Remote Support Feature for Quick Problem Resolution

These modules would normally cost hundreds or even thousands of dollars more with our competitors' packages. However, at Aldelo Systems Inc., we believe in providing a complete package at an affordable price, enabling you with the technology to propel your restaurant business to new levels!

The Aldelo® For Restaurants software solution is extremely user friendly and very simple to learn. However, we still feel that a complete guide that covers every feature in the software is necessary. In order to take full advantage of our software system, we strongly recommend that you take the time to read this guide before diving into our software solution.

The Structure of the Guide

This guide is divided into parts and chapters in order to help you better focus on the key topics. Prior knowledge of any restaurant point of sale software system is not necessary to use this manual. We are assuming that you are diving into the world of automated POS solutions for the first time. This guide will attempt to teach you everything you need to know about using our POS software solution.

We strongly recommend that you install Aldelo[®] For Restaurants on a computer and try the procedures defined in the guide.

To help you read this guide faster, we have introduced several standard conventions to help you distinguish actions, names, and other topics from the normal content. The following are the conventions used in this guide:

Element	Meaning
Bold	Any reference to feature names will be show in Bold .
“Quotes”	Any reference to a button name will appear in “quotes” (e.g. click the “Enter” button.).
Location Path	The shorthand notation used to navigate through the software will take the following form: Name > Name > Name where <i>Name</i> can be a button, menu item, tab, etc. For example Back Office > Setup > General Settings > Cash Trays represents directions to the window used to define your cash trays.

Part 1

Getting Started

Chapter 1

POS Hardware

Server Computer

In a POS environment, one computer is responsible for maintaining the software database. This computer is usually faster than the other computers in the network. In situations where there is only one computer in the POS network, that computer acts as the server.

What Defines the Server

In Aldelo® For Restaurants, the server holds the database that all other terminals connect to when performing transactions. It does not require any special operating system or hardware to be considered the server computer. Once a database is created on the computer and other terminals connect to that database, the computer is considered the database server. When calling Aldelo Systems Inc. for technical support, our staff will ask which computer is the database server when dealing with database related issues.

The server is also responsible for maintaining time synchronization between the client stations and the server. If one of your client machines has a different time than the server time, the server will change the client time to match. This is an important function, since all reports are based on the date/time stamp of each transaction.

Note: Time Synchronization requires the TCP settings in the Back Office be set up.

Minimum/Recommended Requirements

Most of the time, minimum requirements for software are determined by the operating system. These minimum requirements are meant to give you an understanding of what is required for the system to run. They are not meant as a guideline for purchasing a system. The minimum requirements for Aldelo® For Restaurants can be found on the website at www.aldelo.com.

When purchasing a system, use the hardware recommendations to find the right hardware for your system. Anything less than the recommendation and the customer may experience performance that is slower than expected. The recommended system requirements for Aldelo® For Restaurants can also be found at www.aldelo.com.



Tech Tip: When running several applications at once, monitor your RAM use. When using Windows® XP Pro, there are two things to watch for under the Task Manager > Performance Tab: Physical Memory Total and Commit Charge Total. If your Commit Charge Total is ever greater than your Physical Memory Total, install more RAM. To access the Task Manager, press CTRL+ALT+DELETE and click Task Manager.

Software on the Server

The server computer in our POS network is responsible for holding the database and allowing other systems to connect to it. The server can also be used to run programs that complement Aldelo® For Restaurants. These programs include, but are not limited to, Aldelo® Database Manager, Aldelo® Gift Card Server (if purchased), Aldelo® Polling Server (if purchased), Aldelo® Localization Manager, Aldelo® For Restaurants Wireless (if purchased), Aldelo® Fingerprint Server, Aldelo® Kitchen Display Server, Aldelo® Hotel Integrator, as well as other third party applications.

Each of these programs has its own system requirements. One common system requirement is an internet connection on the server computer. This is required for many of the programs mentioned above.



Tech Tip: Troubleshooting is easier if all network systems are connected to the internet. This allows technicians at Aldelo Systems Inc. to connect to the customer's system remotely while on the phone with them. It also dramatically shortens call length.

Client Computer

Client computers are usually visible to the public and get the most use. Since they are not processing transactions from other systems, their hardware does not need to be as robust as the server computer's. In addition, receipt printers are usually found connected to the client computers, since they are placed where the customers are being served.

What Defines the Client Computer

Any computer on the network on which the database does not reside is defined as a client computer. This system is only responsible for sending transactions to the server computer to be processed. If this system is removed from the network, normal operations still occur, since the database resides on the server computer.

Minimum/Recommended Requirements

The minimum requirements for a client computer are the same as for the server but the recommended requirements change slightly. As before, the recommendations are guidelines to use when purchasing a system. If your restaurant is very busy, the recommended hardware may be insufficient. Ask your reseller or call the Aldelo Sales Department with questions you may have about purchasing hardware.

Software on the Client

The most common configuration for client systems is to run Aldelo® For Restaurants exclusively. The more software that is running on the system, the slower the response time may be when using the system. When a restaurant gets busy, this is not acceptable. Dell, HP, and other vendors may install software that will not be used and may slow the system down. Go through the system and remove any such software. Software that affects performance shows up

in the lower right hand corner of the Windows® Desktop. These programs use small portions of system memory and processor time to run continuously. If you see one that you do not use, uninstall it.

Touch Screens

All-In-One Terminals

There are many advantages to all-in-one terminals including a smaller footprint, more ports for devices, built-in accessories like MSR and customer display, and one manufacturer to contact for technical support. Normally you would have a manufacturer for the system, one for the touch screen, one for the MSR, and one for the customer display. That's potentially 4 manufacturers to call if there is a hardware problem. With an all-in-one terminal, you make one phone call for all issues related to the terminal.

Touch Monitors

Touch monitors are similar to normal monitors, except they are touch enabled. They support typical POS screen resolutions. They require a VGA cable to be connected to the computer as well as a serial or USB cable connected to the appropriate port on the computer. The serial or USB connection is responsible for the touch features of the monitor.

Printers

Printers are necessary in a POS installation. Since there are many different kinds of printers, this section covers the different uses and types of printers that are found in many POS installations.

Interfaces

There are four main interfaces for POS printers: Serial, Parallel, Ethernet, and USB. All are supported by Aldelo® For Restaurants. Each has its advantages and disadvantages. These are covered in the following sections to give you an understanding of what you need in your installation.

Serial

This is the most common interface found in restaurant POS printers since they are very inexpensive. Serial printers have also been around longer than any other interface type.

Serial printers have a maximum distance of 50 feet. Some serial printers can go farther, but require a special serial port on the computer that sends the signal farther without errors. They are frequently used in kitchen applications where cables can be run from the front of the restaurant to the kitchen area.

The downside to serial printers is the setup. Drivers must be installed, and the computer's COM port settings must be configured correctly for the printer to operate. If the serial printer came with a manual, the settings should be listed. If the printer did not come with a manual, the manual can usually be downloaded from the printer manufacturer's website. These settings are

the baud rate, data bits, parity, stop bits, and flow control. The printer must be opened or print an internal test print, usually by holding down the “Feed” button while turning it on to find the current settings. Every printer is different, so check the manual to find out how to do a test print.

Parallel

The parallel printer costs approximately the same as a serial printer, has less setup, but can only be placed a maximum of 25 feet from the computer.

The main advantage of the parallel printer is the ease of setup. With parallel printers, just install the drivers provided by the manufacturer to get the printer up and running. Once installed, you should be able to print a Windows® test page to verify that the printer is working properly.

Special devices can extend the range possible between the printer and the computer. The High Speed Parallel Line Extender from ATEN-USA connects to your printer and computer parallel ports. It uses a straight through phone cable to connect the devices together and can reach distances up to 1,000 feet. Since the device is relatively inexpensive, it is a good way to overcome the distance problem.

Another way to extend the distance is to use a print server. Print servers use TCP/IP for communications and therefore are not bound to the 25-foot limitation. Print servers come in many different types, from single port models to models with three or more ports. An example of a single port print server is the Netgear PS101. This allows your parallel printer to extend its distance up to 300 feet away from the network hub or switch. Since they connect to the network, the print servers must be configured with an IP address as well as any other settings used in the network.

Ethernet

Setup for an Ethernet printer closely resembles setting up your computer to communicate on the network. Both use an IP address, subnet mask, and device name. The utility to configure these settings varies from manufacturer to manufacturer, but they all have ways to configure the printer to communicate on the network.

There are two main advantages to Ethernet printers. The first is the distance. Ethernet printers can be installed up to 300 feet away from the hub or switch to which they are connected. This distance is enough to cover the needs of almost any application the restaurant may need. They use normal network cables. It is much easier to run these cables through walls and ceilings due to their smaller connector type. They use a normal RJ-45 connector, which fits through any nickel-sized hole.

The second advantage is that it does not rely on the computer to continue to operate normally. Since serial and parallel printers connect to the computer, if the computer ever fails, the printers also fail. Ethernet printers connect directly to the network and are not affected by computer related issues.

The disadvantage of Ethernet printers is the cost. They are more expensive than serial or parallel printers since the technology is relatively new.

USB

USB (Universal Serial Bus) printers are extremely easy to install. Just install the drivers and plug the printer into any USB interface on the computer. The USB interface is designed to be connected or disconnected while the computer is operational (“hot swapping”).

The advantage of USB printers is that almost all computers today have several USB ports. USB ports can be found on mini-computers that save valuable space in a restaurant environment. They are easy to install and the cables are very small, allowing for very clean installations.

The disadvantages of USB are cost and distance. The cost of a USB printer is slightly more than a serial or parallel printer but less expensive than an Ethernet printer. The downside to USB is the distance that the printer can be from the computer. The maximum distance is only about 14 feet. This limits the use of USB printers to roles that require or allow the printer to be close to its host computer.

Printer Roles

Receipt

One of the most important reasons for owning a POS system is to generate readable, error free receipts. Computer generated and printed receipts help to eliminate these mistakes. There are several different types of printers. Within each of the different interface types, there are still more options to choose from when purchasing a printer. For receipt printers, a thermal printer is a good choice, due to its speed. Fast receipts are desirable when customers are waiting to pay. Dot matrix printers are slower and noisier.

Kitchen

You also need error free tickets to the kitchen to make the most of your POS investment. Kitchen printers are used to generate tickets in a consistent and reliable manner, allowing the cooks to concentrate on what they do best. Since the kitchen is hot and susceptible to grease, oil, and steam, thermal tickets are not recommended. When a thermal receipt is subjected to high heat, it can turn completely black. The alternative to thermal receipts is normal paper receipts printed by a dot matrix printer. These are not easily affected by heat and are much more durable in a kitchen environment.

Bar

Since there are usually not too many hot items in a bar, thermal printers work well there. A thermal is also a good choice if you have an extremely busy bar and ticket speed is important. Dot matrix printers may also be used in bars. The one advantage of dot matrix printers for bartenders is the fact that they can hear the ticket printing. Sometimes this is a benefit when a bartender is working the shift alone and needs to attend to customers as well as a server drink station.

Label

Label printers create labels for weighed food items, delivery addresses, barcodes, and customer mailings. Currently, Aldelo® For Restaurants supports two labels sizes: 1" x 3" and 4" x 1.5". Check www.aldelo.com for a list of label printers that have been tested to work with Aldelo® For Restaurants.

Report

Most reports in Aldelo® For Restaurants must be printed to a report printer. Any desktop printer that prints on 8.5" x 11" paper can be used as a report printer. It can be an inkjet, laser, or dot matrix printer. Laser printers are recommended. They are much faster and do not require expensive and messy ink cartridges. They do require toner, but the time between replacements is usually much longer than with ink cartridges.

MSR Readers

MSR Readers allow customers to input their information into the POS system quickly by using a plastic card with a magnetic stripe on the back. These devices can read one, two, or three tracks programmed on the card's magnetic stripe. The reader must be programmed to tell it how many tracks it is should read and where the end of each track is. A common configuration is track one starts with a percentage sign (%) and ends with a question mark (?). Track two track starts with a semi-colon (;) and ends with a question mark (?). MSR Readers are connected to the system by a variety of interface types.

Keyboard Interface

The keyboard interface uses the keyboard port on your computer. The cable has a splitter on it so that you can also connect your keyboard to the computer. If you do not have a keyboard connected to the system, connect a keyboard terminator on the end of the splitter to simulate the presence of a keyboard.

USB Interface

The USB interface is becoming a popular interface for the same reason all USB devices are becoming popular; ease of installation and availability of ports. Many systems come with two or more USB ports, which can be expanded to allow as many as 127 devices connected to them through USB hubs and "daisy chaining." The USB MSR reader drivers must be installed before connecting the reader.

Serial Interface

The last type of MSR reader interface is serial. As with any serial device, the correct COM port must be selected and the device drivers installed (if any) before connecting the device. A serial device requires the system to be restarted so the operating system has a chance to detect it.



Tech Tip: A good way to test this device is to open Notepad and swipe an MSR card through the reader. If the contents of the card display on the screen, then the device should be working correctly.

Pole Displays

Command Set

The current command set supported by Aldelo® For Restaurants is the UTC or Ultimate Command Set. Currently, this is the only command set supported by Aldelo® For Restaurants. When ordering a pole display, be sure to request that documentation be included regarding control codes.

Serial

This is the most common type today. Some manufacturers design the pole display to work only on certain COM ports. Read the documentation carefully before attempting to install any pole display. There are usually no drivers to install with pole displays but again, always refer to the documentation before proceeding.

Cash Drawers

Printer Driven

A printer driven cash drawer receives commands from the printer at specified times, allowing the cash drawer to open. Many different companies make printers and cash drawers, so it is important to verify that the two pieces of hardware will work together. Most manufacturers have documentation on what cash drawers and printers are compatible. When in doubt, contact the manufacturer for information on specific hardware combinations and cable requirements.

Serial

The serial cash drawer plugs into the COM port of the computer and acts like a normal serial device. Check the port settings against the documentation to make sure they are correct. There are control codes that must be set when setting up the cash drawer in Aldelo® For Restaurants, so have the manual or guide that lists these control codes available for reference.

MICR Readers

A Magnetic Ink Check Reader (MICR) is used to quickly enter the checking account number and bank routing number from a customer's check. It is useful if you plan to use the Aldelo® For Restaurants Bad Check Tracking feature. Rather than having to key in your customer's routing number and account number from the check, you can just slide the check through the reader.

Keyboard Interface

These devices work much like the MSR reader. The MICR reader comes with a splitter cable to allow connection of a keyboard to the computer along with the MICR device. Just as with the MSR Reader, if you do not want a keyboard connected to the computer, install a keyboard terminator on the end of the splitter cable to simulate the presence of a keyboard on the system.



Tech Tip: A good way to test this device is to open up Notepad and run a check through the reader. If you see the account information show up on the screen, then the device should be working correctly.

Barcode Readers

A barcode reader reads the information encoded into the various types of barcodes in use today and inputs it into the system. The most common type of barcode reader is the gun type.

Keyboard Interface

Again, this device plugs directly into a splitter cable to allow a keyboard to be connected at the same time. If you do not have a keyboard, connect a keyboard terminator to the splitter cable.

USB Interface

Simply install the drivers for the barcode reader, if necessary, and plug it into any available USB port.



Tech Tip: A good way to test this device is to open up Notepad and scan a barcode on any item you find. If you see the barcode information show up on the screen, then the device should be working correctly.

Weight Scale

The only weight scale currently supported by Aldelo® For Restaurants is the Avery Berkel NCI 6700. The scale has a serial interface and comes in four different models. The scale weighs food items that sell by the pound. Weight scales are found mostly in deli-type operations.

Caller ID

Caller ID devices read information from the telephone company and send it to a software program to display to the user. Aldelo® For Restaurants can display this information. These devices are available in two, four, and eight port models. Once installed, Caller ID information is

available to all POS terminals on the network. If you use a single line Caller ID modem, only that station to which it is connected will have Caller ID information, as Aldelo® For Restaurants does not support sending information to the other terminals using single line Caller ID devices.

If Caller ID works in HyperTerminal, it should work in Aldelo® For Restaurants. HyperTerminal comes with Windows® and can be used to troubleshoot your modem. If the modem does not work, there are ways of getting the information development needs to add the modem to the list of supported modems.

Coin Changer

If you run a small retail shop in your restaurant or use Aldelo® For Restaurants to run a retail store, you may need some way of quickly making change for your customer. Coin changers are very efficient at dispensing correct change quickly and accurately. These devices are simple to operate and reliable. Simply plug the unit in according to the manufacturer's instruction manual.

Chapter 2

Network Hardware

Physical Network

With the need for more than one terminal comes the need to setup a network. This section describes different network devices and how they relate to a successful POS installation.

Cabling

One of the most underestimated pieces of the network is the physical cabling. If not done properly, the entire network becomes unusable.

Aldelo Systems Inc. recommends having your cabling installed professionally. This is especially important if there are walls or other obstacles to contend with. Air conditioners and fluorescent lights are common culprits that can interfere with the signal, possibly causing network outages.

If you prefer to do the cabling yourself, it is best to refer to the EIA/TIA 568 specifications. These can be found by searching Google for “EIA TIA 568.” Some places charge for the full document but enough free information can be gathered from various web sites to get the job done.

The current standard for network cables is CAT5e or better. This allows you to grow to Gigabit Ethernet if you decide to upgrade in the future. Use this cable in conjunction with RJ-45 connectors to wire your restaurant.

In order to have enough places to connect your devices, imagine where you want your terminals and where you might want terminals in the future. This gives you a good idea of where you need to install your cable runs. Leave extra spots to plug in devices, since you never know what devices you may need in the future. Common practice is to use a two-plug receptacle allowing two connections to one wall jack. This gives you more flexibility in the future.

You also need to figure out where you want all your cables to terminate at the other end. If this is in a back office or closet, make sure it is clean and well ventilated for the hub/switch/router operation.

Hardware

When installing your network, connect the network cables from the individual devices to one central location so that everything can communicate. This job is accomplished through the use of several different types of devices. These are NIC cards, hubs, switches, and routers. Routers can be used but are more common in larger networks that require more complex setup.

NIC Cards

The Network Interface Card (NIC) takes information passed to it by the other parts of the computer and translates it to a format that the network can use. This format is used to pass it to other nodes on the network. The most common type of NIC card is the 10/100 type, which means it can communicate with either a 10Mb network or a 100Mb network. Some systems recently have begun to ship with 10/100/1000 type cards which will enable you to transfer data up to 1000MB, or 1GB per second, assuming the rest of your network supports it. For most applications, 10/100 is acceptable.

Hubs

A hub is the simplest device on a network. Its purpose is to relay information to other systems on the network. It does not perform any kind of data processing or intelligent routing of data. If information is received on one port of the hub, it is sent out to every other port in a shotgun fashion on the device, hoping that the data will get to the right place. These devices have lights on them that indicate if the hub is able to communicate with the device on the other end. The lights blink when data is present.

As with NIC Cards, hubs come in different speeds. The most common type today (10/100) is capable of switching between 10Mb and 100Mb per second depending on the NIC card speed at the other end. They also have Half/Full duplex capabilities. Full duplex is recommended to increase speed. Hubs are generally okay for networks that do not pass much information.

Switches

A switches is the intelligent cousin of the hub. It performs the same work as a hub, but in a way that eliminates collisions. Collisions occur when two devices try to communicate at the same time on the network. Since hubs do not prevent collisions, this becomes an issue when you have a busy network with several systems.

Hubs have no information about who is where on the network, whereas switches maintain a table of who sent what on the network. This allows the switch to send the data only between the ports that are communicating. Combined with Full Duplex communication, collisions are eliminated. As with the hub, there are lights that indicate the status of each port on the device. Refer to the product's manual for an explanation of the operation of the lights.

Since switches are priced very competitively with hubs, switches really are the best choices for simple networking.

Routers

A router is used to communicate with separate networks that do not share the same subnet. This topic can get very advanced and is beyond the scope of this manual.

The most common application for a basic router is on a DSL or cable connection to the internet. The device has simple, built in routing functions to connect you to the rest of the world. Some of Aldelo Systems Inc. other applications require knowledge of these devices. This is covered in each application's respective manual.

Wireless Access Points

If you use the wireless edition of Aldelo® For Restaurants software, you need wireless access points to allow the PDA to connect to the network.

The two main wireless protocols in use today are 802.11b and 802.11g. The 802.11b protocol is currently the most widely used, but 802.11g is gaining in popularity. The best solution at this time is to purchase a device that supports both protocols. These devices are widely available and are relatively inexpensive. They can be found at computer hardware retailers or stores such as Wal-Mart, Staples, etc.

Assembling Your Network

Once you have installed your cabling and purchased all your hardware components, you can start connecting them to build your network. This section assumes you have already installed Windows® XP Pro on your terminals with the default configuration.

Since you already planned where you want your terminals, just place the terminals and connect them to the wall jacks you installed with patch cables. Short runs of Cat5e cable are used to connect devices to wall jacks or hubs/switches/routers. They can also be built to custom lengths by a cable installer.

Once the terminals are connected to the network, connect the other ends of the connections to the hub/switch/router. Place the hub/switch/router in an office or other secure location so that the cables cannot be accidentally disconnected by employees or through normal restaurant operations. Maintaining a clean environment around the hub/switch/router helps prevent dust or debris from causing problems with the device. Also, try to keep the amount of movement of the device to a minimum. Many times people place the device in a high traffic area, such as on a desk or a bookshelf, where other objects are coming and going, moving the device around. This could damage the cable connection to the device. It is good practice to mount the device with screws to prevent movement.

Starting the Network

When all the devices are connected to the network, turn everything on to begin testing. Most devices have lights to indicate that the device is connected and operating properly. Once the systems are running and Windows® is fully booted up, configure your systems to participate on the same network.

Chapter 3

Network Software

Configuring Windows[®] for Networking

This manual covers installation in Windows[®] XP Pro. Aldelo Systems Inc. recommends that the operating system of the POS terminals be upgraded, if necessary, to Windows[®] XP Pro.

Windows[®] XP Pro

Windows[®] XP comes in two versions: Windows[®] XP Home and Windows[®] XP Pro. In a business environment, it is a good idea to use the Pro edition. There are many features in Windows[®] XP Pro that make setting up a network and configuring network settings much easier. Windows[®] XP Home lacks some of the tools necessary to do a clean installation of Aldelo[®] For Restaurants.

To change the workgroup name:

1. Click “Start”
2. Navigate to the “My Computer” icon and right click on it.
3. Navigate to and click on the “Properties” option at the bottom of the list. This displays the System Properties page.
4. Click on the “Computer Name” tab. This displays the page where your network settings can be changed.
5. Click on the “Change” button. Here you can change the computer name and workgroup name.
6. Change the workgroup name to your desired name.
7. Click OK. When the system prompts to restart, accept and allow the system to be restarted.

To change the computer name:

1. Follow the steps above and change the “Computer Name” field in step 5.

To change the IP address of Windows[®] XP Pro:

1. Click “Start” on the desktop.
2. Navigate to and click on the “Control Panel” icon in the menu.
3. Click on the “Network Connections” icon.
4. Click on the “Local Area Connection” icon. This displays the Local Area Connection Status page.
5. In the Name column, right-click on “Local Area Connection.”
6. Click on “Properties.” This displays the Local Area Connection Properties page.
7. Highlight the “Internet Protocol (TCP/IP)” item. The properties button becomes active.
8. Click on the “Properties” button. This displays the Internet Protocol (TCP/IP) Properties page.

9. Click “Use the following IP address:” This activates the fields below the setting, enabling you to edit them.
10. In the IP address field, enter the IP address you wish to use for this system, e.g. 192.168.0.1.
11. Press the “Tab” key on the keyboard and the “Subnet mask” field populates automatically with the proper subnet mask. This value is usually correct.

Testing Your Network

Now that you have configured the network, you are ready to test to see if the network is operational. You can perform two tests. The first is to use the Ping command in MS-DOS. Click on the “Start” button, and then select the RUN option. Now type “Command” in the open field of the Run dialog screen. You will see the MS-DOS screen appear. Enter “PING w.x.y.z” where wxyz is the IP address of another computer that you have specified earlier in the setup. For example, if you want to test the server computer from one of the other POS stations, use “ping 192.168.0.1” then press the Return key on the keyboard to issue the command. Wait and see if there are any replies. In addition, check out the **Packet Loss** information. This value should be zero to denote that your network is successfully configured. If your **Ping** results returned failures, check your cabling and settings. If the problem persists, you will need to consult with a qualified network technician to check out your problem.

Although the network setup and configuration procedures are quite simple, an experienced computer technician may be able to help you set up the network faster. Therefore, if you have any doubts as to the installation of the network, then it may be beneficial to have a qualified technician assist you or complete the job for you.

In addition, the Windows® network installation help information should be referenced during your network configuration, should have any questions. Windows® XP Pro also has a Network Installation Wizard that might be helpful in assisting with the network configuration portion.

Chapter 4

POS Hardware Setup

Setting Up the Terminal

With All-In-One terminals, the setup should be very straightforward. Terminal manufacturers usually install everything for you before they ship the product. This includes the touch screen drivers, MSR drivers, customer display drivers, etc. If you need assistance with installing drivers for the terminal, the manufacturer should be able to assist with the installation.

If you use a touch screen separate from the computer, you must install the touch screen drivers. For instructions on how to do this, refer to the manufacturer documentation.

Setting Up the POS Printers

Before you can print receipts from Aldelo® For Restaurants, you must set up the printers in the Windows® Printer Folder. As with most other Windows® based programs, Aldelo® For Restaurants communicates with the Windows® Printer Spool for management of the print jobs. This allows a print job to be redirected to another available printer if the selected printer is out of paper or cannot print for any reason. When this happens, you receive a message indicating that the selected printer is unavailable, allowing you to print to different a printer.

Note: The print redirect only works if ALL the systems are Windows® XP Pro.

You must setup each of the printers that you wish to access from this current computer station. This includes a network printer resource or a locally attached printer. Follow the steps below to add your printer to the Windows® Printer Folder.

Windows® XP Pro

1. Click the “Start” button located on your Windows® taskbar.
2. Navigate to and click on “Control Panel” icon.
3. Navigate to and click on “Printers and Faxes.” This displays the Printers page where all your installed printers are listed.
4. Click on “Add Printer” in the Printer Tasks menu on the top-left side of the screen. This displays the Add Printer Wizard.
5. Follow the wizard to install either the printer. Local Printers are physically attached to the station. Network printers are printers attached to the network through a computer that is on the network. Have the correct driver from the manufacturer available if the wizard prompts for it.
6. Near the completion of the wizard, you will be prompted to print a test page. Be sure to print the test page to make sure that you have installed the printer successfully.



Tech Tip: If you absolutely cannot get the drivers from the printer manufacturer, you can use the Generic Text Printer Drivers in Windows® as a temporary replacement but it is recommended that the correct drivers be installed as soon as possible. The functionality of your computer will be the same, although we cannot guarantee the printer will function as it would with the proper driver installed.

Sharing Printers in Windows® XP Pro

1. Click on the “Start” button on the Windows® desktop.
2. Navigate to and click on “Control Panel”
3. Navigate and click on “Printers and Faxes.” This will bring you to the Printers page.
4. Right click on the printer you wish to share. This will bring up a menu of options.
5. Click on “Properties” at the bottom of the menu. This will bring up the properties of the printer.
6. Click on the tab named “Sharing.” This will bring you to the page where you can change the sharing settings as well as install additional drivers for other operating systems that will be using this printer over the network.
7. Click the “Share As” option. This will enable the field next to it where you can enter a share name for the printer.
8. Change the share name to something that is meaningful such as Kitchen1 or Bar1.
9. Click “Apply.”
10. Click “OK.”

Testing the POS Printers

Once you have installed all your printers in Windows®, test to make sure that all computers can print to all printers attached to the network. Remember that each system in the network must have all the printers installed in its Printers folder. For example, if you have three systems, each with a printer attached, make sure those three printers show up in each of the three systems’ Printers folders; one for the local printer connected directly to the machine and two that are installed as network printers.

To test the printers on all the stations:

1. In Windows® XP Pro, navigate to the Printers folder.
2. Right click on the printer you wish to test. This displays a menu with a set of options.
3. Click on “Properties” at the bottom of the menu. This displays the properties of the printer.
4. Click on “Print Test Page.” This sends a print job to the printer you are current working with.
5. Repeat steps 2 thru 4 for each printer. Make sure each of the test pages prints correctly.

If you cannot print a test page, contact the printer manufacturer for assistance.

Setting Up the Cash Drawer

Printer Driven

Most cash drawers are connected to the printer by a four-wire cable resembling a phone cable. Make sure you have the correct cable for the drawer and that the drawer is compatible with the printer you connect it to. Call the manufacturer of the cash drawer if you are not sure. If the cable is permanently connected to the cash drawer, connect the other end of the cable into the cash drawer port of the printer. These are easily identified by the shape of the port.

Once you have the drawer connected to the printer, there should be instructions on how to open the cash drawer through a DOS command. If you do not have these instructions, contact the manufacturer.

Serial

If you have a serial cash drawer, the setup is similar to that of other serial devices. The cash drawer has a power cable and a serial cable to connect to the computer.

Make sure to turn off your system before installing any serial device.

1. Connect the serial cable to the cash drawer and the computer.
2. Connect the power cable to the cash drawer.
3. Turn on the computer.
4. Once the system is up and running, you should be able to open a DOS command box and issue commands to open the drawer. Refer to the manufacturer's documentation for instructions.

Setting Up the Customer Display

Installing customer displays is similar to installing serial cash drawers. A power cable and a serial cable connect the customer display to the computer. Once connected, run some tests through DOS to ensure the device is working properly. One setting to make note of is the command set in use. The default command set for Aldelo® For Restaurants is the UTC command set.

If your customer display does not support this command set, make sure you have all the commands for the command set that the customer display supports. With this information, it is possible to configure Aldelo® For Restaurants to use an alternate command set.



Tech Tip: Some customer displays will only allow you to install them on certain COM ports because some COM ports are powered COM ports instead of non-powered. Check with the manufacturer of the customer display to see if this may be the case.

Setting Up the MICR Reader

Keyboard Interface

To install the MICR Reader on this interface, the MICR Reader comes with a “Y” splitter that allows you to connect the keyboard and MICR device to the keyboard port at the same time. If you do not want to install a keyboard at the station, you may need to install a keyboard terminator. This device connects to a keyboard interface and simulates the presence of a keyboard. Certain MICR Readers that do not have a keyboard or a keyboard terminator installed will not work. Please contact your hardware vendor for additional information about hardware configuration.

USB Interface

Some MICR Readers that use a USB interface will work with Aldelo® For Restaurants. Check with your hardware vendor for instructions on how to set them up.

Setting Up the MSR Reader

Keyboard Interface

To install a keyboard interface MSR, follow the same steps as described in the MICR setup. Connect the splitter to the computer or terminal, connect the MSR reader to the splitter, and connect either a keyboard or keyboard terminator to the splitter (if necessary). To test it, open Notepad in Windows® and swipe a card through the MSR reader. If you see data written in Notepad, the device is working properly.

Serial Interface

To install a serial interface MSR reader, follow the same general steps as with any other serial device.

1. Turn off the system.
2. Connect the serial cable from the MSR reader to a COM port on the computer or terminal.
3. Make sure that the device’s power cord is plugged in.
4. Start the computer or terminal.

To test the device, install the drivers that came with the MSR reader. Refer to the manufacturer for instructions on how to test the device in Windows®.

USB Interface

Some MSR Readers that use a USB interface will work with Aldelo® For Restaurants. Check with your hardware vendor for instructions on how to set them up.

Setting Up the Barcode Reader

Currently, the keyboard interface barcode scanner is supported by Aldelo® For Restaurants. To install this device, follow the same instructions as many other keyboard interface devices. Install a splitter cable and then connect the barcode scanner as well as the keyboard or keyboard terminator to the splitter.

Setting Up the Coin Changer

Currently the USB version of the coin changer is supported. If you are using Aldelo® For Restaurants, just plug the coin changer into any available USB port on the computer or terminal. There is also a power plug that must be attached to the coin changer.

Setting Up Caller ID

Modem

Many modems have integrated Caller ID functions. Refer to the manufacturer's instructions on how to install the modem. Internal modems require a card to be installed inside the computer and external modems require an open serial port. USB modems have not been tested with Aldelo® For Restaurants and should not be used unless they can map to a COM port on the computer and will work in HyperTerminal.

Multi-Line Caller ID Device

If you need more than one line for incoming calls, install a multi-line Caller ID box. Aldelo® For Restaurants supports many models. Follow the instructions below to install these devices.

1. Turn off the computer or terminal.
2. Connect the serial cable to the Caller ID device and to any COM port on the computer.
3. Connect the power cable to the device and turn on the device.
4. Connect any phone lines that you want to monitor. Label the lines for reference.
5. Turn on the computer.

Part 2

Software Installation and Configuration

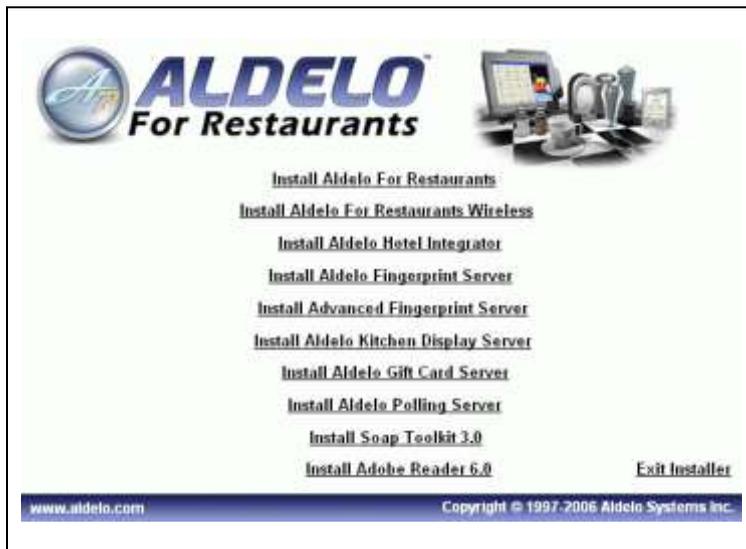
Chapter 5

Software Setup

Installing Aldelo® For Restaurants

Once you have your network and hardware setup, install the Aldelo® For Restaurants software. Make sure you have your CD handy and are able to install using a CD-ROM drive on each system; or you can transfer the files from the CD onto a USB drive to take with you to each system in the event that the systems do not have a CD-ROM drive.

1. If you are using the CD method of installing, place the CD into the CD-ROM drive. The splash screen launches automatically.



2. Select the software you wish to install.
3. Walk through the install wizard and make sure to read the EULA carefully, as it has important information you should know about the product licensing.
4. You are asked if you wish to install other tools that come with Aldelo® For Restaurants. These tools assist in maintaining the database as well as other tools to help with language translation.
5. Congratulations! You have successfully installed Aldelo® For Restaurants.

Adjusting Windows®

Proper Screen Resolution

To operate Aldelo® For Restaurants software efficiently, we strongly recommend that you change your Windows® display settings to the suggestions mentioned below. You can still use Aldelo® For Restaurants with a different display configuration, but use the suggested settings below for best results.

In order for all of the screen components in Aldelo® For Restaurants to fit properly, you must change the screen resolution to **800 x 600** pixels. To do this:

1. Right Click your mouse anywhere on the desktop (where there isn't an icon) and then, with the left mouse button, select "Properties."
2. Click on the "Settings" tab and change the Screen Resolution to 800 x 600 pixels.
3. Click the "Apply" button.



16 Bit Color Palette or Better

Although not required, we recommend that you set your color depth to 16 Bit or higher for better graphics display on your computer. To do this:

1. Right Click anywhere on the desktop (where there is not an icon) and then, with the left mouse button, select "Properties."
2. Go to the "Settings" tab and change the Color Quality to 16 Bit or higher color.
3. Click the "Apply" button.

Small Font 96 DPI

You should also change the computer's font size to Normal Size 96 DPI. To do this:

1. Right Click anywhere on the desktop and select "Properties."
2. Choose the "Settings" tab and click the "Advanced" button to change the font size attribute.
3. Click the Apply button.



Keep the Taskbar on Top of Other Windows Taskbar option

By default, the Windows® Taskbar is always present. With Aldelo® For Restaurants, it is easier and safer to have the taskbar setting "Keep the taskbar on top of other windows" unchecked.

Please refer to the following page for additional settings that should be enabled for the task bar.

To do this:

1. Right Click on the "Start" button on the Windows® desktop.
2. Select the "Taskbar" tab.
3. Make sure the box that says "Keep the Taskbar on Top of Other Windows" is NOT checked.

TIP: If you have trouble with the above configurations, refer to Windows® Help.

Setting the Taskbar to Auto Hide

For the best display, set your Windows® Taskbar to Auto Hide. This prevents users from launching other programs while using Aldelo® For Restaurants. By doing this, the taskbar is hidden whenever the cursor is NOT on the taskbar. Keep in mind, if the user has access to a mouse, he can open Windows®.

1. Right Click on the Windows® Taskbar then select “Properties.”
2. Check the “Auto Hide” check box.
3. Click the “Apply” button.

Multiple Languages

Supported Languages and Special Multilingual Capabilities

When using Microsoft Windows® XP Pro, Aldelo® For Restaurants has multilingual features that can be configured with ease.

Aldelo® For Restaurants software currently supports English, Spanish, and Chinese languages for 100% of the screen interfaces, both in the POS and Back Office sections. However, you can still translate the software yourself. Aldelo Systems Inc. can supply a utility to assist you in translating the software to whatever language you desire. This is the Localization Manager Utility. It installed with Aldelo® For Restaurants. The use of this utility is discussed later in this manual.

In addition to supporting multiple languages, Aldelo® For Restaurants can specify primary and secondary menu item and modifier names. You can use the English equivalent of the menu or modifier name in the primary language field, and another language equivalent in the secondary language field.

A setting in system options (explained in later chapters) allows the guest receipt and screen output to show the primary language names while the kitchen receipt print out receives the secondary language (e.g. Spanish). Kitchen staff and wait staff speaking different languages is no longer a barrier, as the POS software allows the wait staff to enter the order in one language, while the kitchen staff receives the order in another language (of course, you must program the menu first for it to work).

Another feature of the multilingual system, “Follow-Me,” displays the screen interface in your preferred language, as specified in your employee settings (explained in later chapters). The entire screen interface language changes to accommodate your preference.

Additionally, “Follow-Me” lets you define your menu and modifier name viewing options so that the employee can view both the menu items and modifiers in either the primary or secondary language. This way, when you have English as the primary language field of the menu items and Chinese as the secondary language field, an employee who has specified to view menu items in the secondary language will see all the menu items or modifiers in Chinese. Remember, if you use a language other than English, Spanish, or Chinese, you must use the Localization Manager Utility to translate the software. The secondary language field mentioned above can be used with any language, but any other part of the software will be in English, Spanish, or Chinese. If you use Windows® XP Pro, you have native Chinese support without the need for translation software. For help setting this up, please refer to the Windows® help system. “Follow-Me” technology enables different ethnic employees to work together and use the system with the language of their choice.

Language Settings in Windows® XP Pro

Some languages require the language symbols or characters be entered into the software. Windows® XP Pro has native support for Asian languages when symbols are needed. Here we go over how to setup the language settings in Windows® XP Pro. These settings must be changed to view the software in the language of your choice.

Adding Chinese in Windows® XP Pro

To add the Chinese language to Windows® XP Pro, follow the steps below. These steps assume you have the Windows® XP Pro CD available.

1. Click “Start” on the desktop.
2. Navigate to and click on “Control Panel.”
3. Double click “Regional and Language Options.”
4. Click on the “Languages” tab.
5. Select the “Install files for East Asian languages” checkbox.
6. Click “Apply.” You are prompted for the Windows® XP Pro CD.
7. Put the Windows® XP Pro CD in the tray and click “OK.” This copies all the files needed for this language and prompts you to restart the system.
8. Once the system is restarted, go back to Regional and Language Options in Control Panel.
9. Click the “Advanced” tab and select the language of your choice.
10. Click “OK” but do not restart yet.
11. Click the “Languages” tab. This displays the Text services and input languages.
12. Click “Details.” This displays the Default input language settings.
13. Click “Add.”
14. Select the language and keyboard layout of your choice, click “OK,” and restart the system.

Spanish ALT codes

To enter Spanish characters, use the codes provided by Windows®. Simply hold down the ALT key on the keyboard and type the number listed.

	Capitals		Lowercase		Punctuation
	Á ALT+0193		á ALT+0225		¿ ALT+0191
	É ALT+0201		é ALT+0233		¡ ALT+0161
	Í ALT+0205		í ALT+0237		« ALT+0171 (Left Angle Quote)
	Ó ALT+0211		ó ALT+0243		» ALT+0187 (Right Angle Quote)
	Ú ALT+0218		ú ALT+0250		€ ALT+0128
	Ñ ALT+0209		ñ ALT+0241		
	Ü ALT+0220		ü ALT+0252		

Adding a New Font to Windows®.

To display in a language other than what is listed in windows, or if you have trouble displaying your language, try installing a font that supports your language. Search the internet for a font that best suits your needs. There are hundreds of different fonts to choose from. Once you find an acceptable font, install it in Windows® under the Fonts icon in the Control Panel.

To install a font, go to File > Install New Font. This displays the font selection screen where you specify the location of the new font to be installed. Once the font is installed, make sure to write the exact name of the font down for use in Aldelo® For Restaurants. Enter the font name in **Station Settings > General > System Language Settings**. Receipts and reports, require “fixed width” fonts. These special fonts allow set column widths when printing columns of numbers.

Registering & Activating Aldelo® For Restaurants

The first time you launch your software, it is in Demo mode. If the demo expires, the product registration window prompts you to enter your product registration and validation key. To register your software and receive your validation key, please register online or contact Aldelo Systems by calling 209-533-3711. You can also request registration via e-mail at contact@Aldelo.com. **If you send a request by e-mail, please be sure to provide your serial number, restaurant name, street address, telephone number, city, state, zip code and the name of the owner of the restaurant.** Please be sure this information is completely accurate. The product registration is quite simple and quick. Just follow the instructions below for quick and easy registration.

In the Aldelo[®] For Restaurants Product Registration window, enter your serial number, restaurant name, street address, and telephone number *exactly* as you want it printed on the guest receipt. These fields are case sensitive, so be sure all information is correct (the street address should be just the address; no city or postal code should be entered). Be sure to enter the serial number **including** the dashes. Entering correct information during registration will avoid problems later on.

1. Locate the **Dynamic License Number**. The Aldelo Support Technician will verify that it matches the Dynamic License Number we have on record.
2. Once your Dynamic License Number matches the one we have on record, the technician will read you the **Validation Key**. Enter this number.
3. Click **Register**.

If the registration is successful, you get a message stating so. If not, verify that dynamic license numbers match and your restaurant information is entered the same *exact* way you registered it with Aldelo Systems Inc. If you are still unsuccessful, contact Aldelo Systems Inc. for further assistance.

Repeat these steps for each of your computers running Aldelo[®] For Restaurants. Use the same registration information and validation key for all the licenses.

If you ever need to change your restaurant's telephone number or name, you *must* contact Aldelo Systems Inc. so that your registration can be updated to reflect the change. If your restaurant changes ownership or address, you *must* contact Aldelo Systems Inc. A License Transfer Agreement must be signed and a fee may be due. The original copy must be mailed to Aldelo Systems Inc. to make the change legal, and so that the license can be re-registered under the new information.

Internet Registration

If you have access to the internet, you can register your software within seconds. Click the "Register via Internet" button to start the process. You need your serial number on the back of the DVD case to complete this process. Make sure you fill in the information you want printed on the receipt. *Do not use cell phone numbers, home addresses, or temporary names, addresses, or phone numbers.*

Software Activation

Once registered, you have 10 days to activate each station on the network. This is added protection to ensure your copy of Aldelo® For Restaurants is genuine. This protects you from piracy and from people trying to sell the Aldelo® For Restaurants product without a license.

To activate each station, follow the steps below. These steps assume you are in the Back Office and have already registered the software.

1. Click "Help" on the menu bar.
2. Click "Software Activation."
3. Follow the instructions provided by the Aldelo Support Representative or click "Activate Via Internet."
 - a. Activation via the internet is recommended The process is fast and convenient.
4. Repeat steps 1-3 for each station on your network.

If you cannot activate via the internet, you can call in to activate each station.

Note: The serial number and license number can be found in **Back Office > About**.

Sharing the Database Folder

In order for all stations to connect to the database, you need to share the folder where the database is located.

Sharing in Windows® XP Pro

To share a folder in Windows® XP Pro, follow the steps below. These steps assume you are the administrator on the machine.

1. Open "My Computer" on the desktop.
2. Click "Tools" in the menu bar.
3. Navigate to and click on "Folder Options."
4. Click the "View" tab. This displays the screen where you can change advanced settings.

5. Click the “Show hidden files and folders” radio button in the Advanced Settings section. This shows folders and files that are not normally visible.
6. UNCHECK the “Use simple file sharing (Recommended)” box. This will allow the security tab to show when sharing a folder.
7. Click “Apply.”
8. Click “OK.”
9. Some folders now look somewhat transparent. These are folders that were hidden before.
10. Open up the “C:” drive in My Computer.
11. Follow the path of “Documents and Settings\All Users\Application Data\Aldelo Systems\Aldelo Data\.”
12. Right click the folder named “Aldelo For Restaurants.”
13. Click on “Sharing and Security.”
14. Click the “Share this folder” radio button and change the share name to “Aldelo.”
15. Click the “Permissions” button to display the ACL (Access Control List) for this folder.
16. Make sure that the group “Everyone” has “Allow” / “Full Control” permissions. If you require different permissions, consult with your network administrator.
17. Click “Apply” and “OK.”
18. Click the “Security” tab. This shows the ACL for the folder security permissions. These are different from share permissions and must also be set.
19. Make sure the “Everyone” group has “Allow” / “Modify” permissions. If you require different permissions, consult with your network administrator.
20. Click “Apply” and “OK.”

Selecting a Database

After the registration process, you are prompted to select your startup database file (if you have not already done so). There are three choices. The first is **Start With Demo Database**. Select this choice if you would like to start using the pre-programmed demo database. It is a good idea to check this box if you are not yet familiar with configuring or using Aldelo[®] For Restaurants. **Do not** use the demo database to build your menu. This database is for demo purposes only and is removed when the software is uninstalled.

The second option is to **Create A New Blank Database**. Select this choice if you want to begin creating your own database, specific to your Restaurant. When you select this option, you are prompted to enter the name of your restaurant. This will also be the name of the folder and database file kept on your computer. Remember what you use for the name, as it may be needed in the future for troubleshooting purposes. **Do not** build your database on top of the Demo database; if you do and you uninstall your application, your database will be deleted.

The last choice is **I Will Select My Own Database**. Select this choice if you have already created a database you want to link to it.

Another option on this screen is **Always Connect To This Database**. Click this box if the database you select is the database you will use every time you start Aldelo® For Restaurants. Check this box unless you are just using a database temporarily.

If the software cannot find the database defined in the registry, it will ask if you want to clear the registry so that you can select the database manually.

To manually edit the database location in the registry, follow the instructions below.

1. Click “Start” on the Windows® desktop. Click on “Run” and type in “regedit.”
2. This displays the registry editor. Go to HKEY_CURRENT_USER > Software > VB and VBA Program Settings > Aldelo For Restaurants > Version 3 (or “Version 4” if you are using version 4 of Aldelo® For Restaurants).
3. Find the Registry Keys “Data Source” and “Forced Data Source.” Double-click the name.
4. On the Edit String screen, change the path accordingly, and click the “OK” button.

Creating a Database

When you start the software for the first time, you may want to play with the demo database. Once you have a good feel for how you use the software, start creating your own database. **Do not** use the demo database as a starting point. If you want to use items from the demo database, export them and import them into your new database. ***Demo databases are deleted when the software is uninstalled.***

To create a new database, follow the steps below. These steps assume you are in the database selection screen. This screen has three options: Start with Demo Database, Create a New Blank Database, or I Will Select My Own Database.

1. Click on “Create a New Blank Database.”
2. Click “Continue” and enter the name of the database.
 - a. Only enter the name. The .mdb extension is not necessary.
3. Click “OK” and enter the information as requested.
4. Once completed, you see the Store Settings and the Station Settings. Do not set anything yet. Click “Done” to skip past these pages.
5. In the Back Office, click “Setup.”
6. Navigate to and click on “Employee Setup.”
7. Navigate to and click on “Employee Files.”
8. Create an Employee File for yourself and make sure to fill in and remember your access code. Give yourself a security level of five to ensure you can navigate the system without restrictions.

This database will be created in the directory of:

C:\Documents and Settings\All Users\Application Data\Aldelo Systems\Aldelo Data\Aldelo For Restaurants\Databases\Live\[database name as folder name]\[database name].

Connecting to a Database over the Network

When your database is ready for other machines to connect to, make sure you have already setup the sharing permissions discussed earlier. This covers connecting to the database over the network in Windows® XP Pro.

To connect to a database on another computer, follow the steps below. These steps assume you have completed the folder sharing successfully and have tested to make sure you have access to the database.

1. On a client machine, go to the Back Office of Aldelo® For Restaurants.
2. Click on “Data Source.” This displays the warning for switching databases.
3. Click “Yes” after reading the warning. The Database Selection screen displays.
4. Click “I Will Select My Own Database.”
5. Click “Always Connect To This Database.”
6. Click “Continue.” This displays the Open File dialog box.
7. Find and click on “My Network Places.”
8. Double-click on “Entire Network.” This displays some options for the network.
9. Double-click on “Microsoft Windows Network.” This displays the network workgroups.
10. Double-click on the workgroup name. This displays a list of computers in the workgroup.
11. Double-click on the computer name that has the database stored on it.
12. Double-click the “Aldelo” folder. This displays a list of folders in this shared folder (this assumes you have followed the naming convention recommended in the folder sharing section of this manual).
13. Double-click on the “Databases” folder.
14. Double-click on the “Live” folder.
15. Double-click on the folder with your database name as the folder name.
16. Double-click on the file with the database name.

This starts the process of setting this system up on the database. You are prompted with the Station Settings screen. Click “Done” to skip this and come back to it later. It is recommended that you check to make sure that the selected database is correct and that all information is correct.

Information Data Entry

This section covers data entry and must be completed before using the software for the first time. This data consists of information unique to your restaurant such as the your table groups, menu items, employee information, etc. The easiest way to complete this section is to follow along in the Online Manual and fill in each field after reading the explanation. The Online Manual can be found in the Aldelo® For Restaurants software from the main POS screen by navigating to **Back Office > Help > Online Manual**. Find the section titled “Information Data Entry” in “Chapter 5 – Software Setup.” Follow along, and enter all information relevant to your restaurant. You can access this section by finding it in the Table of Contents at the front of the Online Manual,

holding down the Control key on your keyboard, and clicking on the entry. This takes you directly to the corresponding page in the manual. To find a screen in the software while you are following along, directions to the screen being explained are provided in the format of “Screen 1 > Screen 2 > Screen 3 > Screen 4.”

Part 3

Software Operation

Chapter 6

Opening Procedures

Time Cards

Before starting your day, you may want to check a few things about your employment. You also want to clock in, start your staff bank, and perhaps have a pager assigned to you. This section cover many of the things you do when you first come to work.

Clocking In

The first thing to do before anything else is clock in. If you are a salaried employee, you are able to clock in any time you wish. If you are an hourly employee, you might not be allowed to clock in until your scheduled time. If you want to disable this behavior and allow employees to clock in anytime, check the option **Schedule Not Enforced** in the employees file under the Payroll tab.

You also have the option for to allow your employees a grace period before their scheduled clock in time. This is found in the Advanced Settings section. The option is called **Time Card Clock In Grace Minutes**. Highlight it and click “Edit” to change the value of the setting. This allows employees to clock in before their scheduled time to start their day early. This time is added for payroll purposes. If you do not wish to pay the employee for the grace minutes, you can round the time to the nearest quarter hour. This feature is called **Time Card Clock Rounding Minutes** and is found in the Advanced Settings section.

To clock in, follow the steps below.

1. Click on the “Time Card” button in the Main POS screen and enter your access code. You should have already created an employee file for each employee that works in the restaurant.
2. Click on the “Clock In” button. This displays your clock in time.
 - a. If you have multiple jobs, the system asks what job you are working. There are two requirements to enable multiple jobs.
 - i. The employee must have two separate employee files with the exact same information except the job title and the pay rate.
 - ii. The option called **Employee with Multi Job Selection** must be checked. This option can be found in Store Settings > Staff / CRM.



Tech Tip: This screen goes away after you Clock In. Use the “Stay” button to keep you in this screen until you are finished with everything you need to do.

Viewing Your Schedule

While in the Time Card screen, you may want to see what your schedule looks like for a particular week. To view your schedule, follow the steps below. These steps assume you are already in the Time Card screen.

1. Click on the “View Schedule” button. This displays the date picker so you can enter the week you would like to see.
2. Enter any date in the week you would like to see. This displays the report showing your scheduled time for the work week.
3. Either print the report on the receipt printer or click “OK” to exit the screen.

Information on the schedule includes the employee name, job title, date / time it was generated, the employee’s scheduled hours including breaks, regular hours, overtime and double time hours, and the total hours worked.

Earnings Report

While in the Time Card screen, you may also want to see how much you have earned up to this point for the current pay period. To view your current earnings, follow the steps below. These steps assume you are already in the Time Card screen.

1. Click on the “Earning Report” button. This displays the report with the current information for this pay period.
2. Either print the report on the receipt printer or click “OK” to exit the screen.

Information on this report includes the employee’s name, salary type, title, date range of the report, list of clock in and out times, total hours for each day, total money earned, any wage advances, total hours worked, and net wages earned.

Register a Pager

If your restaurant uses Staff Paging, a pager assigned to you. Two types of pagers can be used. If you are a regular employee, an alphanumeric pager is used. If you are a manager, you need an alphanumeric pager that supports text so that you can receive updates on sales information. The pager assigned to the manager has a special number. This number is specified in the option **Manager Alert Pager Number**. This option is found in Store Settings > Other.

There is also security that can be set to allow only authorized employees to assign pagers. This setting is called **Staff Paging Register Pager Security Level**. It is found in Store Settings > Services > Hostess / Paging Setup > General.

To have a pager assigned to you, follow the steps below. These steps assume you are already in the Time Card screen.

1. Click the “Pager” button. This displays the Staff Paging screen. Here you assign pagers as well as send pages to the manager or other employees.
2. Click “Register Pager.” This displays a keypad where you can enter the pager number.
3. Enter the number of the pager you wish to use. This sends a test page to verify that the pager is operational.

Starting Your Bank

Starting Staff Bank

There are two options in Aldelo® For Restaurants for managing settlement transactions: Cash Drawer and Staff Bank. Staff Bank is used when employees handle their own money and a cash drawer is not assigned to them. It is often considered as their own personal cash drawer without the physical hardware. Money pouches are often used to carry the cash and change. Employees using Staff Bank may not also be a cashier. Only one option may be used at any time.

To enable staff banking, two required options need to be checked.

1. Check the **Enable Staff Banking** checkbox located in Store Settings > Revenue > Cashier.
2. **Use Staff Bank** must be enabled for every employee using it. This is located in Back Office > Setup > Employee Setup > Employee Files > [Any Employee] > Payroll.

Once Staff Bank is enabled for an employee, a “Start Staff Bank” button appears on the Time Card screen. To start staff bank, follow the steps below. These steps assume staff banking has been enabled and the employee is in the Time Card screen.

1. Click on “Start Staff Bank.” This will bring up a keypad so that you can enter the start amount.
2. Start amount can either be given by the restaurant or provided by the employee. Once you enter the amount, the system will ask who provided the start amount.

You can also have Staff Bank start automatically when you clock in. This option is called **Auto Start Staff Bank When Clock In**. This always starts the staff bank with a start amount of \$0.00.



Tech Tip: You can also use the registry setting “Staff Cash Drawer User Serial Port” to allow an employee’s Staff Bank to use the local Serial Cash Drawer. This works well for allowing two cash drawers on one system.

Cashier In

The main way to settle transactions in a restaurant is to use a cash drawer. Most restaurants have at least one cash drawer, if not a cash drawer for every station. Before taking payments from customers, you must tell the system a cash tray is available to receive money. Many features are exclusive to cash drawers and are not available to Staff Bank. These are Gift Certificate, Pay Out, Refund, and Settle. Staff Bank can still settle orders although not through the “Settle” button in the Main POS screen.

To enable Cashiers, at least one cash tray must be created. Follow the steps below to create a cash drawer. These steps assume you are in the Back Office.

1. Click on Setup. This is located in the top left part of the screen.
2. Navigate to and click on General Settings.

3. Navigate to and click on Cash Trays.
4. Enter a name for this cash tray. This name can be anything you wish.
5. Click “Save.”

To cashier in, follow the steps below. These steps assume you have clocked in.

1. Click the “Cashier In” button in the Main POS screen. This displays a keypad. Enter your access code.
 - a. This step can be secured so that only authorized employees can cashier in. The security is called **Cashier Sign In/Cashier Sign Out** and is located in Security Settings.
2. Click on the cash tray you want to assign to yourself. This displays the Money Count screen where you will enter the start amount of the drawer.
 - a. Twelve denominations are available. These denominations can be changed in Store Settings > Revenue > Other. The feature is called **Custom Currency Denominations**. This feature is used mainly by customers in countries other than the United States.
3. Enter the currency you start with. Make sure this information is correct or your drawer will show a discrepancy at the end of the shift.
4. Click “Finish.” This will prompt you if you are finished with your money count.
5. When asked if you are finished with the money count, click “Yes” or “No.”

Money Count Screen

These are the denominations available.

These are the checks and Room Charges (if available) received.

These are the credit card charges received.

This is a built in number pad so a keyboard is not required.

Cash		Check/Room Charges		Charges	
Dty	Total		Add		Add
\$100.00	0.00				
\$50.00	0.00				
\$20.00	0.00				
\$10.00	0.00				
\$5.00	0.00				
\$2.00	0.00				
\$1.00	0.00				
\$0.50	0.00				
\$0.25	0.00				
\$0.10	0.00				
\$0.05	0.00				
\$0.01	0.00				
Cash	0.00				
Total	\$0.00	Total	0 \$0.00	Total	0 \$0.00
Total Amount	\$0.00				

This works the same as the tab button on the keyboard and goes from one field to the next.

This closes the cash drawer and assumes the money in the drawer is correct.

This is a quick way to enter the amount counted without entering each denomination separately.

This saves checks and charges you have already accounted for and do not want to count at the end of the shift.

Chapter 7

Hostess Procedures

Reservations

If your restaurant accepts reservations, Aldelo® For Restaurants has many features to accomplish the task. This job is usually handled by the hostess but can be handled by any employee with access to the hostess features.

The hostess features work when the option called **Use Hostess Features** is enabled. This is located in the Back Office > Setup > Employee Setup > Employee Files > Payroll. Once this feature is enabled, three buttons show up in the Table Selection screen: Hostess, Assign Table, and Assign Tab.

To access the reservation system, click on the “Hostess” button in the Table Selection screen. Follow the steps below to access the reservation system.

1. Click on the “Dine-In” button in the Main POS screen. This prompts you for your access code.
2. Enter your access code.
3. Click on the “Hostess” button.
4. The default tab is the reservation tab.
 - a. The reservation tab can be disabled (if not be used in your restaurant) by enabling the option **Disable Reservation Feature**. This option is found in Store Settings > Services > Dine-In > Hostess / Paging Setup > Reservation.

Creating A Reservation

To create a new reservation, follow the steps below. This assumes you are in the Hostess screen.

1. While in the “Reservation” tab, click on “New.” This displays the new reservation screen where you enter the reservation information.
2. If you already have the customer information stored in your database, ask for the customer phone number. If the customer is not in the database, enter the name manually in the “Party” field. If the customer is found, the “Party” field is automatically populated.
3. Click on the “Adults” button to enter how many adults are in the party. Repeat this for the children, highchairs, and wheelchair fields.
4. Click on the type of seating requested. These are the buttons below the customer type buttons.
5. Click on the “Enter Reservation Time and Table” button. This displays the “Select Reservation Time and Table” screen.
6. Click on the date button at the top of the screen to display the date picker screen.
7. Choose the reservation date.

8. Select the time of the reservation in one of the two time columns. The left is AM and the right is PM. Adjust the time to each quarter hour with the buttons below the hour lists.
9. Select the table you wish to use for the reservation. If the table is not available, it is either yellow, green, or blue. If available, it is grey or flashing.

Changing A Reservation

Once you have created a reservation, you may need to change it to accommodate a customer request. Any information in the reservation can be changed and is exactly the same as creating a reservation.

To change a reservation, follow the steps below. These steps assume you are in the reservations tab.

1. Click on and highlight the reservation you wish to edit.
2. Click “Edit.” This displays the screen where you can change any of the information entered previously.
3. Once you have changed the information, click “Done.” This updates the reservation.

If a reservation must be changed after it has been marked as Checked In, Walk Out, No Show, or Cancelled, double-click it and select the “Make Active” checkbox. To show the reservations that have been marked with the various statuses, click on the filter buttons at the bottom of the reservation list.

Other options in the reservation tab include:

- Date picker to change the day being viewed.
- A “Today” button to change to the current day quickly.
- A print option to print the reservation list being viewed.
- Navigation arrows to scroll up and down in the list when no keyboard is present.

Checking In A Reservation

When a customer arrives for their reservation, you must check the customer in. Simply highlight the reservation and click “Check In.” If the customer arrives a bit early and must wait until their table is ready, you can assign them a pager to notify them when the table is ready.

Waiting List

To keep track of customers waiting to be seated, use the waiting list feature. It is included in the hostess features, with reservations and paging. The waiting list works similarly to the reservation window.

To disable the waiting list feature, enable the option called **Disable Waiting List Feature**. This option is found in Store Settings > Services > Dine-In > Hostess / Paging Setup > Waiting List.

Add A Customer to the Waiting List

To create a waiting list entry, follow the steps below. These steps assume you are in the Hostess screen.

1. From the “Waiting List” tab, click on “New” to display the new waiting list entry screen.
2. Ask for the customer phone number. If the customer is in the database, the “Party” field populates automatically. If the customer is not found, type the name in the “Party” field.
3. Click on the “Adults” button to enter the number of adults in the party. Repeat this for the children, highchairs, and wheelchair fields.
4. Select the seating type requested by using the buttons below the Adults, Children, etc. buttons.
5. Assign a pager if the paging system is in use. A test page is sent to the pager to ensure that it is operating correctly.
6. Click “Done.”

Check In the Customer

When a table matches the customer specifications, the system recommends the table. This displays in the “Elapsed” field of the Waiting List screen. The recommended table displays next to the elapsed time. Once a table has been identified as ready, the customer can be notified by highlighting the entry in the waiting list and clicking “Paging.”

Other options in the reservation tab include:

- Date picker to change the day currently being viewed.
- A “Today” button to change to the current day quickly.
- A print option to print the reservation list being viewed.
- Navigation arrows to scroll up and down the in list when no keyboard is present.

Assigning a Table

The hostess has the option to assign a table to an employee manually. These features are not available unless the employee has access to the hostess features. When a hostess assigns a table, the employee being assigned the table must be classified as a server. This setting is called **Is A Server** and is located in Back Office > Setup > Employee Setup > Employee Files.

To assign a table to a server, follow the steps below. These steps assume you are in the Table Selection screen as the hostess.

1. Click on “Assign Table.” This displays the screen with a list of employees that have the **Is A Server** option checked in their employee file, and are currently clocked in.
2. Highlight the employee you wish to assign the table to and click “Select.”
3. Click the table number you wish to assign to the employee.
4. Enter the number of guests. This assigns the table to the employee.

Chapter 8

Dine-In Orders

Order Entry

Dine-In orders are orders associated with a table. If you wish to call it something other than “Dine-In,” you can change this by using the feature called **Alias Name**. This is found in Store Setting > Services > Dine-In.

To create a new order, follow the steps below.

1. Click the “Dine-In” button on the Main POS screen. You are prompted for your access code.
 - a. The only time you are not be prompted for your access code is if you enable the option called **Auto recognize this station’s cashier as the default employee without login**. This option is located in Station Settings > Cashier.
2. Enter your access code. This displays the Table Selection screen.
 - a. To skip the table selection screen and go directly into the order entry screen, use the option called **Skip Table Selection**. This option is found in Store Settings > Services > Dine-In.
3. Click on the table group you wish to see. This displays all tables for this group.
 - a. If you only want employees to see tables assigned to them, use the table assignment feature. This is different from the hostess feature as these are permanent assignments. This screen is located in Back Office > Setup > Table Setup > Dine-In Tables.
4. Click on the table you wish to work with. This displays a keypad asking how many guests are in the party.
 - a. If there is already a ticket on this table you, a screen displays the open ticket(s). Click on the ticket you wish to work with.
5. Enter the number of guests and click “Enter.” This displays the Order Entry screen.
 - a. The default number of guests is pulled from the **Total Seats** field when creating the table. This field is located in Back Office > Setup > Table Setup > Dine-In Tables > [Any Table].
 - b. If you do not wish to enter the number of guests, you can disable the option called **Track Guest Count For Dine-In Orders**. Uncheck this option and you will not be prompted for the number of guests.

Once in the Order Entry screen, you have many functions to choose from. The Order Entry screen is arranged to provide the fastest operations possible. All commonly used buttons are located on this screen for easy access. Menu groups are located on the left side and the menu items on the right. As you click on each menu group, the menu items change to what is in the currently selected group. Action buttons are located below the menu items and are used to perform various tasks with the order. Order settlement information is located in the lower right corner of the screen and is used to send the order to the kitchen.

Dine In Orders

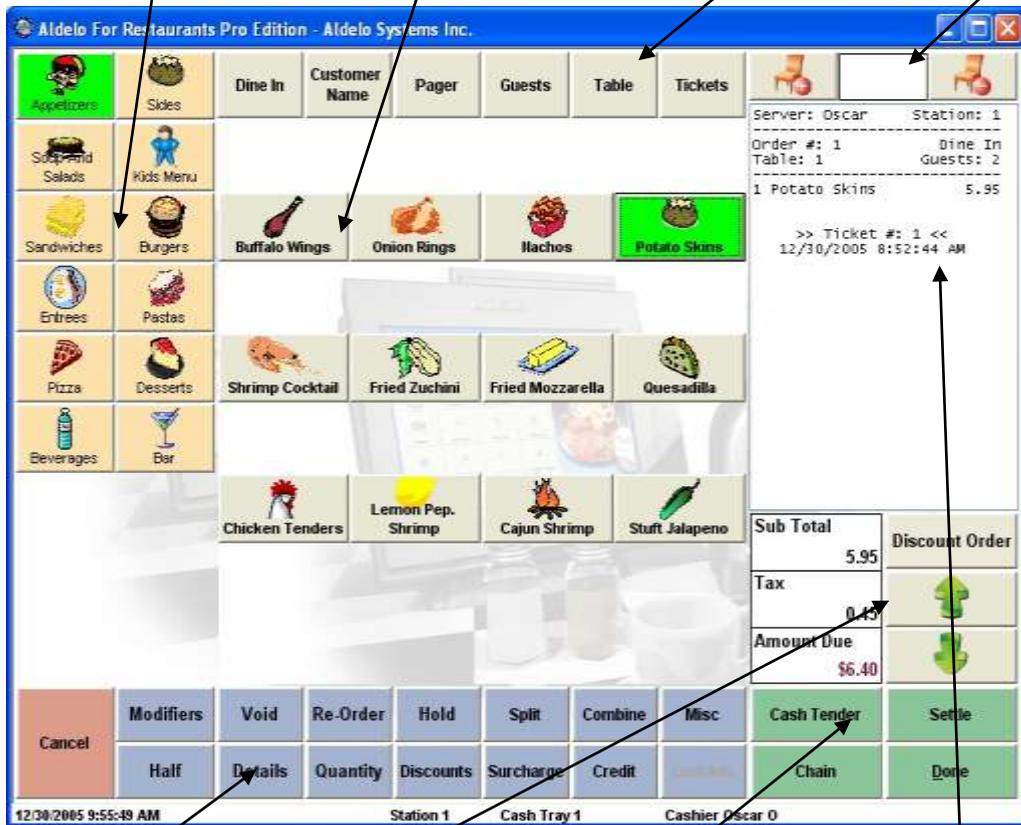
Money Count Screen

These are the Menu Groups.

These are the Menu Items.

These are action buttons to change various properties of the order.

Here you can change the seat you are currently ordering items for.



These are action buttons that perform various actions on the order.

This is the payment information.

These are the payment options. Use either Cash Tender or Settle.

This is the on-screen ticket. This shows all ticket activity.

Adding Items

Once in the Order Entry screen and you want to add items to the ticket, just click on the menu group where the item is located, then on the item you wish to order. The item is added to the ticket.

To add an item to the ticket, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click on the Menu Group where the item is located. This shows all the menu items for this group.
2. Click on the Menu Item you wish to add to the ticket.
 - a. If the menu item has Forced Modifiers or a Modifier Builder Template assigned to it, these pop up after the menu item is clicked.
3. Click “Done” to send the items to the kitchen.
 - a. If you do not want to send the items to the kitchen right away, you can disable the send feature temporarily. The next time you recall the order the item is sent unless you delay it again. This button is called “No Kitchen / Bar” and is found on the Order Entry screen > Misc.
4. (Optional) If you want to settle the order right away, use the settlement functions to do so.
 - a. The “Cash Tender” button assumes the customer is paying with cash and displays a screen allowing you to enter the amount tendered.
 - b. The “Settle” button is used for all forms of payment and should be used when cash is not the form of payment.
5. (Optional) To save this ticket and start another ticket for this table, use the “Chain” button. This button sends the current order to the kitchen and starts a new order for this table. This is useful if the customers have decided to have separate checks among themselves.

Voiding Items

When entering items, you may make a mistake and need to clear the item. This can be done using the “Void” button. This button is located on the Order Entry screen below the menu items. There is security on this function and it may only be used by authorized employees. There is one exception to this rule: if the order has not yet been sent to the kitchen, you may void the item without authorization. The security for this function is called **Void Order or Items** and is located in Security Settings.

To void an item, follow the steps below. These steps assume you have a menu item ordered and are in the Order Entry screen.

1. Click on the “Void” button in the Order Entry screen.
2. Highlight the item you wish to void.
 - a. If the item has been sent to the kitchen, you will see a [*] next to the item name.
 - b. You may also reduce the number items if there is more than one on the same line. Use the “Reduce” button to do this.
 - c. To void the entire line, use the “Void Line” button.
3. Click the “Done” button.

Re-Ordering Items

After you have sent the items to the kitchen or bar, the customer may want to order more of the same item. If this item had many changes to it, it may be embarrassing if you have to ask the customer what their preferences were again.

To order the same item with the same modifiers, follow the steps below. These steps assume you are in the order entry screen and have ordered items.

1. Click on the “Re-Order” button. This displays a list of items that have been ordered previously for this ticket.
2. Select the item that the customer would like to re-order.
 - a. Re-order as many items as necessary and Click “Done.” This is useful for things like beer, which usually come in rounds.
3. When finished, click the “Done” button on the Order Entry screen.

Holding Items

If you need to delay sending the food to the kitchen, use the hold function. There are two forms of hold in the Order Entry screen. Item holds and Order holds. If you hold the entire order, all the items are on the same timer. If you hold individual items, they can all have different hold times.

To hold an item, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click on the item you wish to order.
2. Click on the “Hold” button. This displays the screen that lists all the items on the current ticket. Items that have been sent to the kitchen are marked with a [*].
3. Highlight the item(s) you wish to hold. You can hold items that have been sent to the kitchen as well as items that have not yet been sent to the kitchen.
 - a. If you wish to hold the entire order, click the “Select All” button.
4. Click method you wish to use. There are three options:
 - a. Hold Until Notified holds the order or items until you remove the hold status.
 - b. Hold Time allows you to select how long you wish the hold status to be active.
 - i. The Hold Time screen has many options to allow you to adjust the time to exactly how long you wish the hold status to be active.
 - c. Future Date Hold allows you to hold an order or items that will be prepared on a future date.
5. Click “Done.”
6. Click “Done” in the Order Entry screen to save the hold times to the order.
 - a. This prints a chit in the kitchen with the items and a “Hold” status.
 - i. If you do not want a ticket to print to the kitchen, use the feature called **Enable Delayed Send Order Feature**. This is found in Store Settings > Print > Kitchen / Bar.

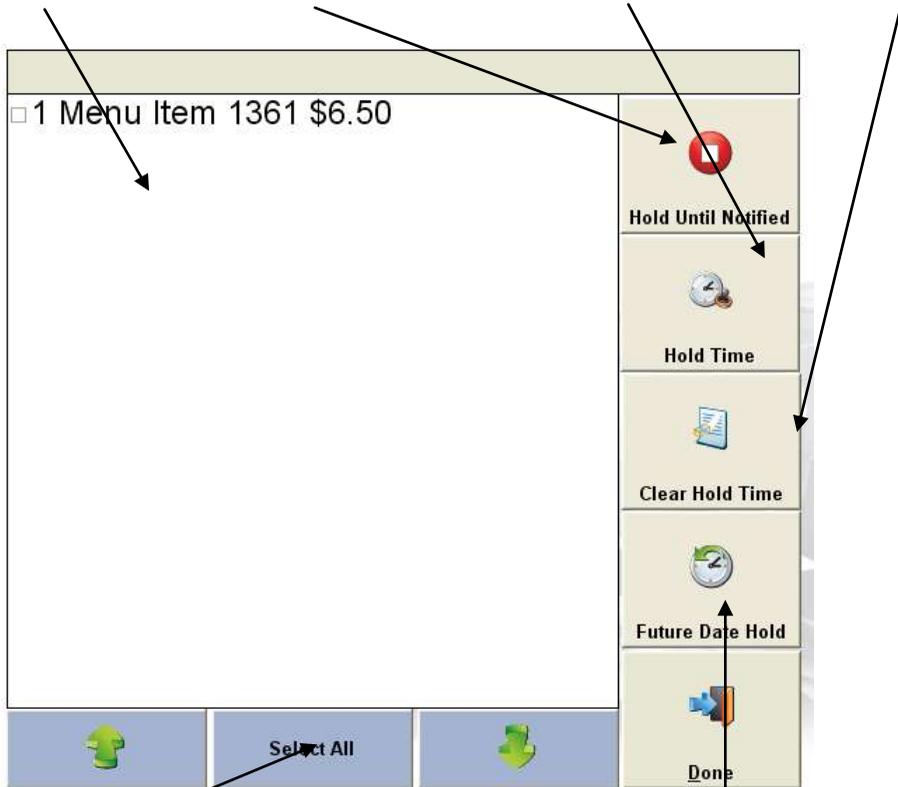
Hold Screen

These are the items you can hold.

Use this to hold until you remove the hold status.

Use this to hold for a specified amount of time.

Use this to clear the hold time on selected items.



Use this to select all the items or click it again to unselect all the items.

Use this to hold until a future date. This button shows the "Date" button in the Hold Time Screen.

Hold Time Screen

These are the quick buttons for number of minutes.

These will adjust the time manually.

This will show the specified hold release time.

The screenshot displays the 'Hold Time Screen' with the following elements:

- Order Time:** 12/30/2005 11:52:12 AM
- Hold Until Time:** (Blank)
- Quick Buttons (5-60 Minutes):** A grid of buttons for selecting hold durations: 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, and 60 minutes.
- Manual Adjustment:** Two 'Hour' buttons (up and down arrows) and two 'Minute' buttons (up and down arrows).
- Date Selection:** A 'Date' button with a clock icon.
- Action Buttons:** 'Cancel' (red), 'Clear Hold Time' (blue), and 'Accept' (green).

This will change the date of the hold to allow future hold dates.

This will clear the hold time.

This will accept the hold time and apply it to the order or item.

Releasing the Hold

Once an item or order is on hold, there are two ways the status can be removed. The first is if the hold time on the item or order expires. Once the time expires, the item or order is sent to the kitchen with a fire command. The second way is if the item or order has the hold status removed manually.

To remove the hold status from the order manually, follow the steps below. These steps assume you are in the Order Entry screen with menu items on hold.

1. Click the “Hold” button in the Order Entry screen.
2. Highlight the item(s) you wish to remove the hold status from.
3. Click the “Clear Hold Time” button. This removes the hold status from the item or orders.
4. Click “Done.”
 - a. Once you click “Done,” the order will be sent to the kitchen with a >>>Fire<<< command listing all the items that have been released.

Splitting an Order

Customers sometimes want to split their tickets. This could happen at anytime during the customer’s visit. They may tell you before ordering, in which case the “Chain” button should be used in Order Entry to create multiple orders. If the customer mentions they would like to split the check after items have already been ordered, you can still split the items into separate checks by using the “Split” button in the Order Entry screen.

To split items onto separate checks, follow the steps below. These steps assume you have items ordered on the ticket and are in the Order Entry screen.

1. Click the “Split” button on the Order Entry screen.
2. Enter the number of **additional checks** to create by clicking the “Add” button. This is the number of checks you wish to create in addition to the check you already have open. For example, if you wish to create two additional checks, click the “Add” button twice.
3. Select the items to remove from the original check by clicking on them. Multiple items may be selected.
4. Click on one of the blank checks. The items are removed from the original check and added to the blank check.
 - a. If you make a mistake, click the “Cancel” button and start over.
5. (Optional) Click on the “Guests” button and enter the number of guests for this check.
6. Repeat steps 3-5 until you have assigned the items to split from the main check. The remaining items are left on the original check.
7. Click “Finish.” This displays the window allowing you to select which checks to print.
8. Highlight the checks to print and click “Print Selected,” or select “Print All” or “Print None.”

Combine Orders

Customers sometimes may want to pick up a tab for a friend or change their minds on having separate checks. When this happens, use the Combine function in the Order Entry screen.

To combine checks, follow the steps below. These steps assume you have multiple orders created and are in the Order Entry screen.

1. Click “Combine” on the Order Entry screen.
2. Select the order you wish to combine with the original order that is open in Order Entry. The order displays, allowing you to review it before accepting it.

3. Click “Accept.” The order is combined with the current order.
4. If you have another order to combine, repeat steps two and three.
5. Click “Done” when you are finished combining all the orders.

Ordering a Half

A customer may only want to order a half order of something. This may be for a child or because they do not want the full dish. To do this, click the “Half” button in the Order Entry **before** clicking on the menu item. Half of the item is ordered and the price for the item is cut in half.

Item Details

Before ordering an item, the customer may want to see what the item looks like, or a description of the item ingredients and what comes with it. Do this by clicking on the “Details” button before you click on the menu item. This displays a screen that shows a picture of the menu item and a description. There are also options to print the description and to order the item. The “Add” button orders the item.

Ordering Multiple Quantity

You may want to order more than one of a particular item. Instead of clicking on the menu item button as many times as needed, click on the “Quantity” button and specify the number of items to order at once. This adds a line to the ticket that indicates the item along with the number specified.

Applying Discounts

Discounts are a big part of a restaurant operation. Specials are going on at various times, customers may have a coupon, managers may give out discounts to frequent customers, and employees may have special pricing on food from the restaurant. All these scenarios are covered by discounts. Discounts may be applied either to the entire order or to individual items on the order. More than one discount may be applied to the order. Items can only be discounted once and cannot have multiple discounts applied. You may however, have five items on a check and discount two of them as well as discount the entire order. This applies the order discount to the remaining items that have not had an item discount applied to them.

To discount an item, follow the steps below. These steps assume you have ordered items and are in the Order Entry screen.

1. Click on the “Discounts” button in the Order Entry screen. This displays a screen that allows you to choose the type of discount to use. There are three options: Discount Order, Discount Item, and Cash Discount.
 - a. Discount Order applies the selected discount to any item in the order that does not already have a discount applied.
 - b. Discount Item applies the selected discount to the selected item. You cannot apply more than one discount to an item.
 - c. Cash Discount allows you to specify the discount amount manually. You may have a Cash Discount and an Order Discount on the same check.

2. Click on the desired discount type. If you choose Discount Order, you are taken directly to the discounts screen. If you choose Discount Item, you must select which item to apply the discount to. If you choose Cash Discount, you must specify the amount of the discount.
3. Click “Done.”

Applying Surcharges

Surcharges must sometimes be applied for various reasons and can be for anything you deem necessary. Surcharges can be a percentage or dollar amount, and may be waived if a check is over a certain amount. Surcharges can be automatically applied to specific order types. If taxes apply to surcharges, select the **Apply Tax on Surcharge** checkbox located in Store Settings > Taxes > [Any Tax].

To add a surcharge to an order, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click on “Surcharges.”
2. Select the surcharge to add to the check. You may only apply one surcharge to an order.
3. Click “Done.”

Applying Credits

There are two ways to generate a credit in Aldelo® For Restaurants: the credit may be earned by participating in the frequent diner program or the credit may be issued manually.

To apply a credit, follow to steps below. These steps assume a credit has been created for the customer and you are in the Order Entry screen.

1. Click on the “Credit” button in the Order Entry screen.
2. Choose the search method for the customer. There are five search methods.
 - a. Phone – This method is used to search by the customer phone number.
 - b. Account Code – This method is used to search by the account code, which is defined in the customer account information.
 - c. MSR Card – This method is used to search by an MSR card. These can be issued by the restaurant as a membership card.
 - d. Customer Name – This method is used to search by the customer name. If you search by customer name, a list of customers names displays that match along with the phone numbers so you can pick the right one.
 - e. Delivery Address – This method searches by the customer’s street address.
3. Provide the information to search for the customer. Once found, a screen appears showing all the credits currently assigned to this customer.
4. Choose a credit to apply to the order. If the entire credit is not used, a balance is maintained.
5. Click “Done” in the Order Entry screen to save the credit to the order.

Changing the Order Type

To change the order type, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click on the button with the current order type. This button is located above the menu items.
2. Choose the new order type.
3. Enter the appropriate information about the order to make the change.
4. Click “Done” in the Order Entry screen to save the changes to the check.

Adding a Customer Name to an Order

To add a customer’s name to the check, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click the “Customer Name” button.
2. On the on-screen keyboard, enter the customer’s name and click “Finish.”
3. Click “Done” in the Order Entry screen to save the customer name to the check.

Changing the Number of Guests on the Check

Use the “Guests” button to change the number of guests on the check due. The button is located above the menu items in the Order Entry screen.

To change the number of guests at a table, follow the steps below. These steps assume you are in the in the Order Entry screen.

1. Click the “Guests” button on the Order Entry screen.
2. Enter the number of guests using the keypad that displays and click “Enter.”
3. Click “Done” on the Order Entry screen to save the new number of guests to the check.

Changing the Table Number of the Check

Sometimes customers may ask to move to another table. This can be done using the “Table” button on the Order Entry screen. The button is located above the menu items in the Order Entry screen.

To change the table number of the check, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click the “Table” button in the Order Entry screen.
2. Select the table you wish to move this check to.
3. Click “Done” on the Order Entry screen to save the changes to the check.

Recall Another Check on the Same Table

If you are working with multiple checks on the same table and need to switch between them quickly, use the “Checks” button on the Order Entry screen.

To change the check you are working on for this table, follow the steps below.

1. Click the “Checks” button in the Order Entry screen to display the Check Selector screen where you can see your checks and choose the one desired.

2. Highlight the check you wish to change to and click “Edit.”
3. (Optional) If you wish to view the checks only but do not want to choose one, click “Done.”

Changing Seat Numbers in Order Entry

To assign seats to the items ordered, you can do so by using the seat icons as well as the seat indicator field. Assigning seats to the order helps the server to remember which item goes to

which customer and also allows for more advanced features such as grouping the items on the guest check by seat number for easier viewing. Several features are associated with the seats function.

1. **Show Seat Assignment Reminder on Done For Dine-In Orders.**
2. **Force Seat Assignment Reminder On Done**
3. **Prompt Seat Number on Startup**
4. **Prompt Seat Number on Each Item.**
5. **Smart Seat Handling**
6. **Show Total Per Seat**
7. **Hide Seat # From Printed Check**

To create seat numbers for a guest check, follow the steps below. These steps assume you are in the Order Entry screen.

1. Click the seat icon with a plus sign next to it to increase the seat number.
2. Click the seat icon with a minus sign next to it to decrease the seat number.
3. Click on the seat number to see the visual table layout so you can choose which seat to work with. The seat number field is directly above the on-screen guest check in Order Entry.

MISC Button

The “Misc” button is used to reach options not commonly used in Order Entry. These functions include:

- **Change Price**
- **Assign Seats**
- **Clear Order**
- **No Sale**
- **Change Server**
- **Gratuity**
- **Cust. Lookup**
- **Recall Order**
- **Create Labels**
- **Retail Screen**
- **Tax Exempt**
- **No Kitchen / Bar**
- **To Secondary Language**
- **Lock Screens**

Change Price

Only employees with a high enough security clearance can change the price of an item. To use the feature, click the “Change Price” button. A keypad appears and prompts you to enter a manager's access code. Enter an access code with a high enough security clearance to display the Change Price window. Select the items to display the Enter New Unit Price dialog box. Enter the new price and click “Enter.”

Assign Seats

This feature is only available on Dine-In orders. It assigns ordered items to certain seats. Click on the “Assign Seats” button inside the MISC window. The Assign Seats window appears. Click the item you want to assign to a seat to display the Seat Assignment window. Choose the seat you wish to assign that item to. Once you have selected the seat, you are returned to the Assign Seats window where you either can pick more items or you can click “Done” to finish with assigning seats.

Clear Order

This feature lets you clear all ordered items, (if the order has not been sent). Click on the “Clear Order” button in the MISC window. A confirmation window appears, allowing you to verify the action.

No Sale

This opens the cash drawer for an employee with a sufficient security level. The security level for this feature is located in the Back Office under **Security Settings > Access No Sale Require Manager**.

Change Server

This feature allows you to change the server assigned to an order. Click the “Change Server” button in the Misc window. The Enter New Server Access Code keypad appears. Enter the access code of the employee taking over this order. Click “Enter” to complete the change.

Gratuity

This feature lets you add a gratuity to an order. Click on the “Gratuity” button in the Misc window to bring up the Gratuity screen. Select the “Percent,” “Amount,” or “Difference” button, depending on what type of gratuity you are adding.

1. If you select “Percent” as the gratuity type, the Enter Gratuity Percent keypad appears. Enter the percent and click “Enter” to apply the gratuity to the order.
2. If you select “Amount” as the gratuity type, the Enter Cash Gratuity Amount keypad appears. Enter the amount and click “Enter” to apply the gratuity to the order.

3. If you select “Difference” as the gratuity type, the Total Tendered keypad appears. Enter the total amount tendered and click “Enter.” This makes the tip amount the difference between the tendered amount and the amount of the ticket.

Cust. Lookup

This feature allows you to search for customers by Phone, Account Code, MSR Card, Customer Name, or Delivery Address. This links the order you are creating to the customer’s account. Click on the “Cust. Lookup” button in the Misc window to bring up the Customer Lookup Type screen. In this popup window, there are five buttons: “Phone,” “Account Code,” “MSR Card,” “Customer Name,” and “Delivery Address.”

If using the Phone search method, enter the customer’s phone number and click the “Enter” button on the keypad.

If using the Account Code search method, after you have clicked the Account Code button, enter the account code in the on-screen keyboard and click “Finish.”

If using the MSR Card search method, after you have clicked the MSR Card button, swipe the magnetic card through the magnetic card reader. This displays the account specified for this card.

If using the Customer Name search method, after you have clicked the “Customer Name” button, enter the name of the customer and click the “Finish” button. After you have completed this, the system displays another popup window with a list of all the names that match the name you entered. Choose the customer’s account to bring up the Review Customer Information screen. If the information is correct, click “Done.”

If using the Delivery Address search method, after you have clicked the “Delivery Address” button, enter the street address of the customer and click the “Finish” button.

Any time you type in a phone number and there is no customer with that number, you must create the customer file before you can continue.

Recall Order

This feature is the same as the Recall button in the Main POS screen. It displays the Recall Order screen, allowing you to recall an order.

Create Labels

This feature allows you to create labels for menu items that are ordered by weight. Click on the “Create Labels” button to bring up the Weighted Menu Item Label Generator. This screen allows you to select the menu item and specify the Unit of Measure, along with the Expiration Date. Use the on-screen keyboard if necessary to enter this information. Once you have filled in the fields, enter the total weight of the menu item. This calculates the price of the order and displays it on-screen.

Retail Screen

This feature allows you to order items by scanning their barcodes. Click on the “Retail Screen” button in the Misc window to display the Retail screen. Scan the barcode to order the item. If the item has any forced modifiers, the system allows you to select them. To void an item, click the “Void” button and void or reduce items as normal. For more information on voiding items, refer to the Void section of this manual.

You can also add menu modifiers, order by weight, or order by quantity by clicking the appropriate buttons. When you are ready to exit the Retail screen, you can click the “Touch Screen” button to return to the Order Entry screen.

Tax Exempt

This feature allows you to exempt tax from the current order. Click on the “Tax Exempt” button to bring up the confirmation screen. Click on the “Yes” button to make the order tax exempt. To remove a tax exemption from an order, click the “Tax Exempt” button again. The system asks if you want to remove the Tax Exemption. Click “Yes” to remove the tax exemption.

No Kitchen / Bar

This feature allows you to specify if you want this order sent to the kitchen/bar. To use this feature simply click on the “No Kitchen/Bar” button and click either “Yes” or “No.” This feature is only active during this session of the order. To suppress the print to the kitchen / bar the next time you recall this order, you must perform this action again.

To Secondary Language

This feature changes the menu item text to the secondary language. Employees that read two languages can use this feature to remember the names of particular menu items they are not familiar with in their secondary language.

Lock Screens

This feature allows employees with high enough security clearance to lock or disable all of the features in the Misc window. Click on the “Lock Screens” button in the Misc window. A keypad pops up and prompts you to enter your access code. Enter the access code and click the “Enter” key. If you entered an access code with high enough security clearance, the screens will be locked and will not be usable until someone with high enough security clearance removes the lock. Follow the same procedures to remove the lock.

Modifier System

Menu Items can have options, such as side dishes and preparation instructions. These must be presented to the cooks and servers in a meaningful way. There are several ways to work with modifiers in Aldelo® For Restaurants: Manual Modifiers, Forced Modifiers, and the Modifier Builder Templates.

Normal Modifiers

This screen is used for manually changing modifiers that are associated with a menu item. This is usually used when a mistake has been made during the initial assignment of modifiers using the Forced Modifiers or the Modifier Builder Template. This can also be used to add a modifier that is not currently in the system. Use the “Split Qty” button to split a quantity of items into smaller quantities. For example, if you have ten tacos and you want to modify only three of them, you can highlight the ten tacos and click Split Qty to tell the system you would like to split three off the main group. It now shows seven tacos and, under that, three tacos.

To use the Manual Modifier screen, follow the steps below. These steps assume you have ordered an item in the Order Entry screen.

1. Click on the “Modifiers” button in the Order Entry screen. This displays the Modifier screen where you can manipulate modifiers for each menu item.
2. Select the menu item to work with from the top right corner of the screen.
 - a. The modifiers assigned to the menu item are shown above the menu items window.
3. Select the modifier type you wish to work with. There are eight modifier types.
 - a. No
 - b. Light
 - c. Extra
 - d. Add
 - e. Exchange
 - f. Half
 - g. Toppings
 - h. Bar Mixing
 - i. There is also a 9th “All” button if you would like to see all modifiers at once.
 - ii. If hide some of the modifier types, you can disable the “Half,” “Toppings,” “Bar Mixing,” and “All” buttons in Store Settings > Products > Modifiers.
4. Select the first letter of the modifier with the buttons to the left of the modifiers. The button ignores the modifier type and only shows modifier names that begin with the selected letter.
5. Select the modifiers to add to this menu item. Modifiers already selected are green and can be deselected if desired (as long as the item has not yet been sent to the kitchen).
 - a. To change the price of the modifier before adding it to the menu item, click the “Change Modifier Price” button **before** clicking the modifier.
 - b. To double or triple a modifier, click “2x” or “3x” **before** clicking the modifier.
 - c. Use the “Note” button to add a Note to the menu item.
6. When you have selected all the necessary modifiers, click “Done.”

Manual Modifiers

In the Modifiers screen, you can create new modifiers on the fly by using the “Manual Entry” button.

To create a new modifier while in the modifiers screen, follow the steps below. These steps assume items have been ordered but not yet been sent to the kitchen.

1. Click the “Manual Entry” button.
2. Highlight the menu item you wish to create a modifier for.
3. Type the name of the modifier in the Modifier Name field.
4. (Optional) Type the secondary language name of the modifier in the Sec. Language field.
5. (Optional) Fill in the additional cost of this modifier in the Additional Cost field.
6. Click “Add”
7. Click “Finish.”

Forced Modifiers

If you want your employees to have a limited list of modifiers to choose from and provide a path to follow when selecting the modifiers, use the Forced Modifier system of Aldelo® For Restaurants.

To use the Forced Modifier system, you must first setup the forced modifiers in Back Office > Setup > Menu Setup > Forced Modifiers.

To use Forced Modifiers, follow the steps below. These steps assume you have already created forced modifiers for the menu items you are ordering and are in the Order Entry screen.

1. Select a menu item that has forced modifiers created for it. This displays the first level popup of forced modifiers.
2. Select a modifier from the first level popup. This displays the second level popup of forced modifiers.
3. Repeat until there are no more levels, or when the seventh level is reached.
 - a. You can disable the “Finish” button in the Forced Modifier Level popup with the feature called **Disable FINISH Button in Forced Modifiers**. This feature is found in Store Settings > Products > Modifiers.

Modifier Builder Template

For maximum flexibility and ease of use, modifier builder templates are the way to go for most restaurants. Modifier builder templates accomplish the work of forced modifiers, as well as create a flexible way of presenting the modifiers to the user. Templates also cut down on the amount of work necessary during setup because a template can be assigned to more than one menu item. To use the Forced Modifier system, you must first set up the forced modifiers in Back Office > Setup > Menu Setup > Modifier Builder Templates.

To use a modifier builder template, follow the steps below. These steps assume you have created a builder template for the menu items you are ordering and are in the Order Entry screen.

1. Click on the menu item that has a modifier builder template assigned to it. This displays the modifier builder template screen.
2. Click the group you wish to work with for this menu item. Only the groups defined for the template assigned to this menu item are shown.
3. Select the modifier type you wish to work with. These are the tan / light orange buttons above the actual modifiers.
 - a. To select a certain type by default, set it up in the Modifier Builder Template Setup screen when you edit each category. Use the Default Action drop-down list to choose the default modifier type.
4. Select the modifier you want to add to this menu item.
 - a. To limit users to select only X modifiers, set this up in the builder template category.
 - b. To force users to select at least X modifiers, set it up in the builder template category.
 - c. To change the price of a modifier, click the “Change Modifier Price” button **before** selecting the modifier.
 - d. To remove an already selected modifier, highlight the modifier and click the trash can icon button. You can also click the modifier again to deselect it.

Pizza Builder System

Pizza restaurants have special requirements when creating an order for a pizza. Since pizzas are so flexible in their design, Aldelo® For Restaurants must also be flexible in the way they are ordered. With the pizza builder screen, creating a custom pizza is simple. Toppings can be divided among halves, thirds, or quarters. Crusts may be selected as well as how to charge topping prices. Many features affect the pizza builder screen. Some of these features are:

1. **Show Pizza Builder Screen**
 - a. This feature shows a menu item as a pizza item in the pizza builder template.
2. **Special Pizza Topping Charges**
 - a. This feature allows you to specify the number of toppings included with a pizza for free before the normal pizza topping charges go into affect. This can also be reversed, so that a number of toppings are charged and the rest are free.
3. **Proportioned Pizza Topping Charge**
 - a. This feature charges half price on a topping that is on only half the pizza, a third on a topping that is on only a third of the pizza, etc.
4. **Half Topping Half Price on EVEN Qty**
 - a. This feature charges half price for toppings that are used on an evenly divided pizza. If thirds is used, the normal price is charged.
5. **Pizza Size Alias Name 1 – 10**
 - a. This feature allows you to change the name of the pizza size to whatever you choose.
6. **Pizza Size Half Topping Price 1 – 10**
 - a. This feature allows you to set the half-topping price for each pizza size.

To use the pizza builder screen, follow the steps below. These steps assume the pizza builder has been setup in **Back Office > Setup > Menu Setup > Pizza Builder Setup**, you have created a pizza with a crust and a couple of toppings, and are in the Order Entry screen.

1. Click on a menu item that has been setup as a pizza item to display the pizza builder screen.
2. Click the pizza crust type (these are the tan/light orange buttons at the top of the pizza builder).
3. Click on the pizza portion you would like to add toppings to (Entire Pizza, Half, Third, or Quarter). Once selected, the area turns white to indicate it is the currently active portion.
4. Click on the toppings you to add to this pizza.
5. Repeat steps 3 & 4 for each side of the pizza, if necessary.
6. (Optional) Click the “Normal Charges” button to change the way pricing is handled for toppings on pizza with multiple portions; finally, click “Done.”
7. Click “Done.”

Chapter 9

Bar Tab Orders

Order Entry for Bar Tab

To use the Bar Tab functions in Aldelo® For Restaurants, you must configure the station as a bar station instead of a server station used to service tables. These settings are found in the Back Office under Station Settings > Other Options. A couple of features are designed to make this switch.

1. **Enable Bar Tab Services For This Station.**
2. **(Optional) Skip Table/Bar Tab Selection for Dine-In.**
3. **(Optional) Bar Drink Items will not charge sales tax (Applies to bar order on this station only).**
4. **(Optional) Bar Tab Caption.**

Enable the feature **Enable Bar Tab Services For This Station**. This shows the bar tab screen, allowing you to create orders based on a customer's name instead of a table number. Bar Tabs are kept separately from the table orders and are considered their own order type, in most cases.

Create a New Bar Tab

To create a new order for a bar tab customer, follow the steps below.

1. Click on "Dine-In" in the Main POS screen.
2. Enter your access code. On the Dine In Type screen, select either a Table or Bar Tab order.
 - a. If you want this station to create bar orders exclusively, select the option **Skip Table/Bar Tab Selection for Dine-In**.
3. Click Bar Tab. This displays the screen where you can see all your current bar tabs as well as create new bar tabs.
 - a. If you want change the "Bar Tab" caption on the button to something different, edit the **Bar Tab Caption** option.
4. Enter a name for this bar tab. You can also use the button with the two people to enter information about the customer when the name is not known.
5. Click "Finish."

The guest check shows the Bar Tab Caption as well as the customer name instead of the table number.

Setting Up Bar Tab Efficiency

Bar Tenders need to move quickly while serving customers and making drinks for other servers' orders. The POS system is potentially the weakest link in the process if not setup properly. Several options in Aldelo® For Restaurants makes ordering items and editing orders very fast. These settings can be found in the Back Office under Station Settings > [Other Options, Cashier, or Quick Service tabs].

These features include:

1. **Auto recognize this station's cashier as the default employee without login.**
 - a. Use this feature for bartenders working alone. You can also use this feature to speed up operations with two people working out of the same cash drawer, however you lose the ability to track which employee is responsible for cash discrepancies.
2. **Change Due Screen Time Out Seconds.**
 - a. Use this feature to set the number of seconds the change due screen shows. This eliminates the need to click on the "Done" button after giving the customer change.
3. **Stay in Order Entry Escreen After Order is Finished.**
 - a. Use this feature to remain in the order entry screen. This is useful if you do not run bar tabs often and just need to quickly process transactions from customers coming up to the bar.
4. **Bar Tab Use Quick Service Order Screen.**
 - a. This feature changes the look of the Order Entry screen and puts more options directly on the Order Entry screen. The screen also has quick cash buttons for processing cash transactions quickly.
5. **Quick Service Screen Auto Log Out Seconds.**
 - a. Use this feature to automatically log out an employee when finished with an order. The system returns to the order entry screen automatically using the **Stay in order entry screen after order is finished** option. This allows the next employee to enter his or her access code and immediately start the next order.
 - b. MSR cards are recommended with this feature so the employee can swipe a card rather than enter a number.
 - c. This feature cannot be used with the **Auto recognize this station's cashier as the default employee without login** option.

Chapter 10

Take Out Orders

Several features can affect the way Take Out orders behave. Some of these features are:

1. **Require Phone # For Take Out.**
 - a. This feature requires a phone number to be entered before an order can be placed.
 - i. To require the system to check the format of the phone number, use the **Enforce Exact Telephone Number Digits** feature. This forces the employee to enter a phone number that matches the **Telephone Display Format** in Store Settings > General.
2. **Take Out / Delivery Show Search Type.**
 - a. This feature shows additional options for looking up customer information when creating a new Take Out order. These options include:
 - i. Phone Number
 - ii. Account Number
 - iii. MSR Card
 - iv. Customer Name
3. **Do Not prompt user to enter customer phone number for take out on this station**
 - a. This feature disables the prompt to search for a customer. A phone number is not required. The user is taken directly to the order entry screen.
4. **New Customer Take Out On Hold**
 - a. This feature places the order on hold until the hold is manually removed for customers not in the system.

Creating a New Take Out Order

To create a new Take Out order, follow the steps below.

1. Click “Take Out” on the Main POS screen. This displays either a keypad or a search method, depending on whether the **Take Out / Delivery Show Search Type** feature is enabled.
2. Enter the phone number or choose the search type and enter information for the customer. This displays the Customer Information screen.
3. Enter the customer information on this screen.
 - a. If this customer is already in the system, the information is populated automatically. If the customer has previous orders, you are able to view those orders by clicking the “Order History” button.
4. Click “Finish.”

Chapter 11

Drive-Thru Orders

Order Entry for Drive-Thru

If your restaurant has a drive-thru window, use the drive-thru features of Aldelo® For Restaurants. There are many unique functions for drive-thru establishments, especially regarding timing and order handling. Several features can affect the way drive-thru orders behave. Some of these features are:

1. **Disable Drive-Thru Timing Feature**
 - a. This completely disables the drive-thru functions in Aldelo® For Restaurants. This feature is commonly used to allow the “Drive-Thru” button to be used for another order type. In this case, change the **Alias Name** of the Drive-Thru order type.
2. **Drive-Thru Orders Use Drive-Thru Stations.**
 - a. This feature allows only stations marked as drive-thru stations to edit or settle drive-thru orders. If the station is not a drive-thru station, the user is prompted to go to a drive-thru station to perform the transaction.
 - b. To make a station a drive-thru station, use the feature **Mark this station as a drive-thru station**. This is found in Station Settings > Other Options.
3. **Mark this station as a drive-thru station.**
 - a. This feature designates this station to be used for drive-thru orders.

Creating a New Drive-Thru Order

To create a new drive-thru order, follow the steps below.

1. Click on “Drive-Thru” in the Main POS screen.
2. Enter your access code. This displays the Drive-Thru timing screen.
 - a. This screen only appears if a drive-thru order has been settled but not marked as complete, meaning that the order has not yet been given to the customer at the drive-thru window. Once marked as complete, the order does not show up in the Drive-Thru timing screen.
3. Click “New Order.” This takes you to the Order Entry screen.

Marking a Drive-Thru Order as Complete

Once settled, the order shows up in the Drive-Thru timing screen. Mark the order as complete only after the customer has received it and driven away. Simply highlight the order in the Drive-Thru Timing screen and click “Mark Complete.”

Chapter 12

Delivery Orders

Order Entry for Delivery

If your restaurant makes deliveries, use the Delivery features of Aldelo® For Restaurants. These features automate the assignment of orders to employees for delivery and the tracking of those deliveries. Several features affect how delivery orders behave. Some of these features are:

1. **Show Driver Dispatch Screen**
 - a. This screen shows a list of drivers while another list shows the orders that are ready for delivery. By default, the employee must enter his or her access code, click “Departure”, then select the orders they wish to deliver. With the Driver Dispatch screen enabled, all this is located on one screen.
2. **Enable Driver Money Drop**
 - a. This feature allows an employee to settle all cash orders in one transaction. To use it, settle all credit cards and checks separately before performing the money drop.
3. **Enable Popup Streets**
 - a. This feature enables a screen to popup with a list of streets as a street name is entered in the delivery address field. This list further filters the choices as more of the street name is typed, reducing the list to match what is already entered.
4. **Round Delivery Total To Next Quarter**
 - a. This feature rounds the total of the guest check to the next quarter, making it easier for the driver to carry change.
5. **Delivery Charge**
 - a. The customer is charged this amount for the delivery. The Delivery Charge is assigned in the following order and uses the first value it finds.
 - i. Customer Record
 - ii. Street
 - iii. Postal Code
 - iv. Global Setting in Store Settings > Services > Delivery
 - v. (Optional) Menu Item level delivery charge overrides all of the above.
6. **Delivery Comp**
 - a. This amount is earned by the employee for performing the delivery. The Delivery Comp is assigned in the following order and uses the first value it finds.
 - i. Customer Record
 - ii. Street.
 - iii. Postal Code
 - iv. Global Setting in Store Settings > Services > Delivery
 - v. (Optional) Menu Item level delivery comp overrides all of the above.

7. **Chained Delivery Charge/Comp Per Trip**
 - a. This feature charges the delivery charge and compensation only on the first order in a chain of orders (for example, multiple orders delivered to the same address).
8. **Delivery Charge/Comp Per Menu Item**
 - a. This feature charges the delivery charge and comp based on the value defined at the menu item level.
9. **Delivery Charge Percent Based**
 - a. This feature charges the amount in the delivery charge field as a percent instead of as a dollar amount.
10. **Delivery Comp Percent Based**
 - a. This feature charges the amount in the delivery comp field as a percent instead of as a dollar amount.
11. **Apply Tax on Delivery Charge**
 - a. This applies a tax to a delivery charge.
12. **MapPoint Enabled**
 - a. This enables advanced routing and mapping features for delivery orders. Microsoft® MapPoint 2004 must be installed on each station used for delivery orders to make use of this integration.

Creating a Delivery Order

To create a delivery order, follow the steps below.

1. Click on “Delivery” in the Main POS screen.
2. Enter your access code. This displays the keypad for entering the customer phone number or the screen allowing you to choose which search type to use. This option depends on the **Take Out / Delivery Show Search Type** feature setting in Store Settings > Staff / CRM.
3. Enter the phone number or the click on the search type and enter the appropriate information to find the customer. This displays the Customer Information screen.
4. Enter the customer’s information. If the customer is in the database, the fields populate automatically.
 - a. If this customer has previous orders, you can pull up those orders and automatically create a new order based on their order history with one click.
5. Click “Finish.”

Chapter 13

Delivery Procedures

Assigning a Delivery Order

There are two ways to assign a delivery to a driver in Aldelo® For Restaurants. The default method requires each driver to enter his access code to assign a delivery order to himself. The other method is by using the driver dispatch screen. The driver dispatch screen is used when the station is dedicated to assigning orders to drivers who are coming and going.

Using the Default Delivery Assignment Procedures

To assign an order to a driver using the default method, follow the steps below. These steps assume a delivery order has been created.

1. Click on “Driver” in the Main POS screen.
2. Enter your access code. This displays the Driver Tracking screen with the current employees’ names at the top.
3. Click “Departure.” This displays the Driver Departure Order Assignment screen.
4. Highlight the order(s) you are taking and click select. Use the arrow buttons to navigate the orders. You can also scan the guest check with a barcode scanner to select the order. Barcodes print on the guest check only when using an Epson TM-T88II/III printer.
5. Click “Departure.”

Driver Dispatch Screen Assignment Procedures

To assign an order to a driver using the Driver Dispatch screen, follow the steps below. These steps assume a delivery order has been created.

1. Click on “Driver” in the Main POS screen. This displays the Driver Dispatch screen.
2. Highlight the name of the driver taking this delivery. Only clocked-in employees and designated as drivers are shown on this screen.
3. Select the orders this driver is taking.
4. Click “Departure.” This assigns the order(s) to the driver. If you accidentally assign an order to the wrong driver, click the “Also Show Assigned Orders” button to show orders assigned to other drivers. You can then assign the order to the correct driver.
5. (Optional) Click “Done.” You can stay in this screen if this station is dedicated to assigning orders to drivers.

Using Delivery Directions and Route Planning

If your drivers need driving directions, you may want to use MapPoint integration. This replaces the Microsoft® Streets and Trips integration, but provides backward compatibility with Streets and Trips. In order to make use of this integration, Microsoft® MapPoint 2004 must be installed on the system that is used to view the driving directions. If more than one system is used for this purpose, a copy of Microsoft® MapPoint must be installed on each of those stations.

MapPoint Integration Setup

To setup Microsoft® MapPoint Integration, follow the steps below.

1. Install Microsoft® MapPoint on all systems used for driving directions and route planning.
2. Enable the feature called **MapPoint Enabled**. Do this by typing **YES** into the field when editing the option. This feature can be found in Back Office > Help > Technical Support > F10. The following features are also on the same page.
3. Enter the current fuel cost in your local area. This feature is called **MapPoint Fuel Cost**.
4. Enter the address where the deliveries depart from. This feature is called **MapPoint Home Address**. The format **must be** [Street Address], [City], [State][Zip Code]. **If this information is incorrect, MapPoint will fail to start.**
5. Enable the feature called **Optimize Way Points**. This calculates the fastest route when delivering several orders.
6. Enter the number of minutes, on average, that it takes for the items to be prepared for delivery in the **MapPoint Route Start Minutes After** field. The system uses this information, plus the calculated route time, to estimate the time of delivery. The estimated delivery time displays on the driving directions.

Using MapPoint Integration

To use MapPoint Integration, follow the steps below. These steps assume you have already setup MapPoint integration, have created a delivery order, and are in the Driver Dispatch screen.

1. Click on the driver you wish to assign the order to.
2. Click on the order(s) the driver is taking for delivery.
3. Click “See Map.” This displays the Route Planning screen. You can print the directions as well as print a map from this screen.
4. Click “Print Map” or “Print Detail.” These will only print to the desktop printer. These will **not** print to a receipt printer.
5. Click “Done.”
- 6.

Viewing Delivery Order Status

Use the Delivery Status screen to keep an eye on the progress of all delivery orders. The screen is accessed from the Main POS screen and is used by managers to keep track of drivers.

Using the Delivery Status screen

To use the Delivery Status screen, follow the steps below. These steps assume you have created a delivery order.

1. Click on the “Delivery Status” button in the Main POS screen.
2. The following information can be viewed on this screen: the order number, the time the order was created, the address to be delivered to, the driver, the departure time, the time the order came in, and the time it has taken up to this point to deliver the order. You may also view delivery driving directions when using the MapPoint Integration.
3. Once an order is delivered, it is removed from this list.

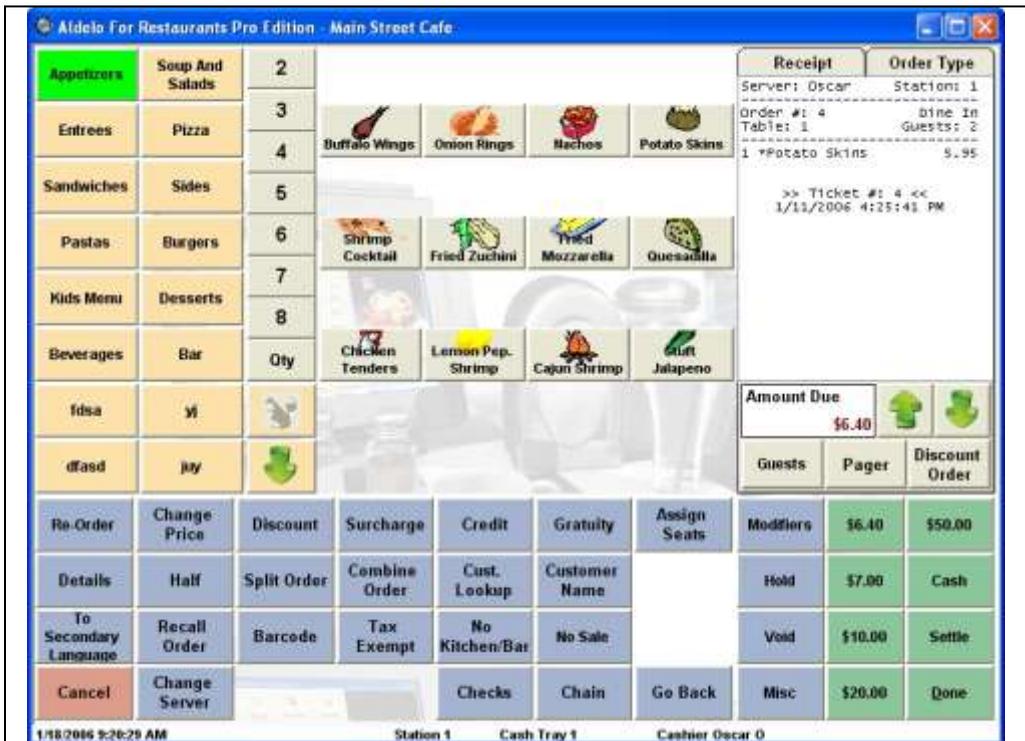
Chapter 14

Quick Service

Using the Quick Service Screen

Many of the operational buttons are displayed in plain view on the Quick Service screen. This eliminates the button click needed to reach these buttons on the normal screen. The modifier builder template is also incorporated onto this screen. When needed, it simply replaces the operational buttons instead of using a popup, which reduces the number of clicks by one.

The Quick Service screen also has an auto-logout feature that automatically logs off a user once they have completed an order. You can also do this manually by clicking the “Change Server” button.



Chapter 15

Recall Procedures

Recall Operations

There are many ways to recall an order so that it can be edited. You may want to recall an order to add more items, change the order type, add more guests, etc. Any time an order must be changed, the recall function is used. Following are several ways to recall an order.

1. Click the “Recall” button on the Main POS screen.
2. Click on an occupied table when in the Table Selection screen.
3. Click the “Recall” button in the Order Selection screen when choosing an order to settle.
4. Click the “Checks” button and select a check to edit in Order Entry.
5. Click the “Recall” button on the MISC screen in Order Entry.

The most common methods of recall are the “Recall” button on the Main POS screen and clicking on an occupied table when in the Table Selection screen. This section only covers the “Recall” button on the Main POS screen, since it is the main way to recall an order.

To recall an order, follow the steps below. These steps assume you have created an order.

1. Click “Recall” on the Main POS screen.
2. Enter your access code. This displays the Recall Order screen.
3. Select the Order Type to filter by. This reduces the number of orders displayed on the screen at once. It also displays specific order type information.
4. (Optional) To see all employees’ orders, click the “My Orders” button. This toggles the filter **off**, displaying orders created by all employees.
5. (Optional) To see orders that have not yet been settled, click the “Open Orders” button. This toggles the filter **off**, displaying both open orders and settled orders.
6. (Optional) Scan the barcode on the guest check.
 - a. The barcode only prints on the guest check if you have an Epson TM-T88 II/III.
7. (Optional) Click on “Show List” to see all the orders as a list, rather than as buttons.
8. (Optional) Click “Print” to create a hard copy of the order instead of recalling it.
9. Click the order to recall. This displays the order in the Recalled Order screen.
 - a. There are four options on this screen: Edit, Print, Rush Order, and Pager.
10. Click “Edit Order.” This displays the order entry screen with the orders information.

Batch Transfer

While in the Recall Order Selection screen, you can batch transfer all of your assigned orders to another server. This is useful when ending a shift and you have open orders still assigned to you. Click the “Batch Transfer” button next to the Total Orders Count information. Have the new server enter his or her access code. All orders transfer to the new server automatically.

Chapter 16

Void Procedures

Void Operations

To void an order, use the void features in Aldelo® For Restaurants. Only certain employees should have access to the void features. When all employees can void an order, there is temptation to take advantage of the system and give free food to friends or family. There are many ways to void an order in the system. This section covers only the Main POS button “Void.”

To void an order, follow the steps below. These steps assume you have an created an order and have inventory depletion turned on.

1. Click the “Void” button on the Main POS screen.
2. Enter your access code. This displays the screen on which you select the order to be voided.
 - a. This screen is almost identical to the recall screen, and is used in the same manner.
3. Select the order to be voided or enter the order number in the Quick Search field.
4. Enter the reason for voiding this order. This displays a screen asking if you want to notify the kitchen or bar about the void operation.
 - a. If you use the same reasons repeatedly, create quick void reasons in Store Settings > Order Entry.
5. Click “Yes” or “No.” This displays a screen asking if this void results in waste or not.
6. Click “Waste” or “No Waste.”
 - a. “Waste” depletes the inventory because the item is thrown away.
 - b. “No Waste” does **not** deplete the inventory because the item was voided before any inventory was used to make the menu item.

Chapter 17

Cashier Operations

No Sale

This function opens the cash drawer. There is a security setting to control which employees can perform this action, as well as a feature to record a picture of the person using a webcam.

Pay Out

The “Pay Out” button on the Main POS screen is used anytime a payout is performed. Payouts come in several forms.

General Payout

General Payouts are used for situations such as paying for items purchased at a store when an inventory item runs out and must be replaced immediately, or when a vendor wants to be paid cash.

To perform a general payout, follow the steps below.

1. Click the “Payout” button on the Main POS screen.
2. Enter your access code.
3. Select the “General” payout type.
4. Enter the Pay Out To, Amount, and Description information.
5. Click “Finish.”

Wage Advance

Sometimes an employee may need money for an emergency. Use the Wage Advance option in payouts to advance money to employees prior to receiving their normal paycheck.

To perform a wage advance, follow the steps below.

1. Click the “Payout” button on the Main POS screen.
2. Enter your access code.
3. Select the “Wage Advance” payout type.
4. Choose the employee you wish to advance pay to.
5. Enter the Amount and Description of the wage advance.
6. Click “Finish.”

The wage advance is automatically deducted from the employee’s next normal paycheck.

Manager Cash Out

This feature allows the manager to take money out of the cash register without reducing the cashier's liability amount. This is used to take cash out of the cash drawer and place it in a safe in the event that the cash drawer contains too much cash.

To perform a manager cash out, follow the steps below.

1. Click the "Payout" button on the Main POS screen.
2. Enter your access code.
3. Select the "Manager Cash Out" payout type. This displays a keypad allowing you to enter the amount to be removed from the drawer. Two receipts print with the amount and a space for the manager signature.
4. Have the manager sign both copies. Place one with the cash removed and the other inside the cash drawer.
 - a. When counting the cash drawer at the end of the shift, count the cash out receipt as part of the drawer amount.

Issuing Refunds

When performing a refund for any reason, use the refund function of Aldelo® For Restaurants.

To perform a refund, follow the steps below.

1. Click the "Refund" button on the Main POS screen.
2. Enter your access code.
3. (Optional) Enter the order number that this refund applies to.
4. Enter the Refund Amount, Reason, and Refund Method.
 - a. If you have integrated credit card processing enabled, you can issue a credit to the customer's credit card.
5. Click "Finish."

Chapter 18

Gift Card Procedures

Issuing Gift Cards

Gift cards are a very important aspect of running a restaurant. They provide a means of creating customer loyalty and a way of introducing new customers to your restaurant. When a customer purchases a gift card, you know they plan on returning. It may also be an indication that the gift card is intended as a gift to a friend the customer wishes wish to expose to your restaurant's food and atmosphere. Gift Cards are always well received and are considered a good way to advertise your restaurant to others.

Many functions can be performed with gift cards including issuing, recharging, multiple simultaneous purchases, and checking balances.

To issue a gift card, follow the steps below. These steps assume you have signed in as a cashier.

1. Click the "Gift Certificate" button on the Main POS screen.
2. Enter your access code. This displays the Gift Certificate screen.
3. (Optional - required if Account Number is not used): Swipe the gift card through the MSR reader while in the MSR Card field.
4. (Optional - required if MSR card is not used): Enter the account number of the card or certificate. This is the number printed on the card or certificate.
5. (Optional) Enter the expiration date of the card or certificate. Use the "/" button to divide the date.
6. (Optional) Enter the Issued To and Presented by fields.
7. Enter the Total Amount face value of the gift card.
8. (Optional) Enter a discount amount. This is used to charge the customer less than the gift card value. If you discount the entire amount, the gift card will be free of charge.
9. (Optional) Click Add to create another card that to be paid for in this same transaction. You can create as many cards as you wish in one transaction. Repeat steps 3 – 9 for every card you wish to create in this transaction.
10. Select the Payment Type. If you use integrated credit card processing, a credit card can be used to pay for the transaction.
11. Enter the amount received.
12. Click "Finish." The gift certificate receipt prints with the certificate number on it.

Recharging Gift Cards

Gift cards can be reused and are often used like a secured credit card. If the customer's balance is low, you can offer to recharge the gift card to add more value to it.

To recharge the gift card, follow the steps below. These steps assume a gift card has been created and the gift card or gift card account number is available.

1. Click the "Gift Certificate" button on the Main POS screen.
2. Enter your access code.
3. Click the "Recharge" button. This displays a screen asking if you would like to search for the gift card by MSR number / ID number or Account number.
 - a. MSR number is the number on the magnetic stripe of the MSR card.
 - b. The ID number is the "Internal Number" of the gift card or certificate.
 - c. The account number is the number that the system uses for its own tracking if an internal ID number is not used.
4. Select "Yes" or "No."
 - a. "Yes" searches by MSR Card or ID.
 - b. "No" searches by Account Number.
5. Swipe or enter the information from the gift card or certificate.
6. Process the gift card as though it were a new transaction. The additional amount charged is added to the existing gift card or certificate balance.

Checking Balances

If a customer wishes to check the balance of their card before using it or are just curious as to the remaining balance, you can swipe the card while on the Main POS screen to have display the balance.

Chapter 19

Order Settlement Procedures

Cashier Settle Operations

When you are signed in as a cashier, you can settle orders to your cash drawer. If you are not the cashier, a cashier must settle your orders for you. The only exception to this is if you are using Staff Bank. You must have a cash drawer open on a station before you can settle orders. There are many aspects to settling an order and there are several ways in which orders may be settled.

Settling in the Main POS screen

The most commonly used method of settling is through the Main POS screen “Settle” button. This button can be used by the cashier to perform settlement operations on any order in the system.

To settle an order using the “Settle” button in the Main POS screen, follow the steps below.

1. Click the “Settle” button on the Main POS screen.
2. Enter your access code. This displays the Select Order To Settle screen.
 - a. This screen is very similar to the recall screen and performs many of the same functions.
3. Click on the order you wish to settle. This displays the Settle Order screen.
 - a. This screen has many options to choose from.
 - i. **Cash**
 - ii. **Check**
 - iii. **Credit Card**
 - iv. **Gift Certificate**
 - v. **House Account**
 - vi. **Complimentary**
 - vii. **Room Charge**
 1. This button only shows if hotel integration is turned on.
 - viii. **Gratuity**
 - ix. **Print**
 - x. **Discount**
 - xi. **Split**
 - xii. **Combine**

Cash

For cash payment types, click on the “Cash” button. A dialog box appears and prompts you to enter the amount tendered. On the right side of this window are some typical amounts that may be tendered. To use one of these, click on the button corresponding to the amount tendered. If you do not see the exact amount tendered, enter it manually. Once you have entered the amount tendered, click “Enter” to finish the settlement.

Check

If the customer is paying by check, click the “Check” button. This takes you to the Check Scan feature. Enter the bank routing number. You can either enter it from the hardware keyboard or you can use the on-screen keyboard by clicking the button with a keyboard icon on it. This displays the key pad where you can enter the number on the touch screen. If you make a mistake, click on the button with a pencil eraser to erase the number. Next, enter the Checking Account Number in the checking account number field. Finally, enter the customer’s Driver’s License information. Once all of the information is entered, click the “Verify” button. The system then prompts you to enter the amount tendered. Enter the amount tendered to complete the transaction.

Credit Card

When a customer pays by credit card, there are two ways to settle the order. Without integrated credit card processing, the order is treated as though the processing is done on bank terminal. The software assumes that the transaction has been successfully processed and simply asks the user how much the transaction was for. With integrated credit card processing, the Credit Card Processing screen displays, allowing the user to process the credit card directly through Aldelo® For Restaurants.

When using credit card integration, you select the credit card type in the settle screen and swipe the customer’s card to process the order. When using the “Two Step EDC Settle” registry, you can adjust the credit card gratuity by using the green button next to the payment amount after the card has been pre-authorized. Once you have adjusted the gratuity, click “Pay” to finalize the payment. If you do not use two-step EDC settle, adjust all gratuities when closing the cash drawer.

ATM / Debit Card

If the customer wishes to pay with an ATM / Debit card, use this option. Since this type of transaction is not currently supported, it simply prompts you to enter the amount that was processed on the Bank Terminal.

Gift Certificate

Click on the Gift Certificate button to display the screen asking how you would like to search for the Gift Card or Certificate. Choose the method and enter the information required. The balance shows on the receipt after the customer has paid with a Gift Certificate.

House Account

Use this option to settle orders for customers who have In-House Charge Accounts. These can be setup in Operations > In-House Charge > Maintain In-House Accounts.

To settle using the House Account button, follow the steps below. These steps assume you have created a house account for this customer.

1. Click the House Acct button.
2. Choose the lookup type to find the customer's account.
3. Depending on what lookup type you chose, enter the customer's information.
4. Review the customer's information.
5. Select "Yes" or "No" when asked if you wish to charge it to the customer's account.
6. If "Yes" is selected above, enter the amount to charge to the account.

Complementary

This allows the user to "Comp" the meal and enter any Discount amount. This is useful for managers wishing to discount meals. This button can also be set to require a certain security level to access it. All complimentary discounts are treated as Cash Discounts. They appear in reports as such.

Room Charge

This allows the user to charge an order to a room when the hotel integration is enabled.

Settling in the Order Entry screen

When using the Settle button in the Order Entry screen, the order is sent to the kitchen while at the same time taking you to the Settle screen. This screen is exactly the same as the Settle screen when using the "Settle" button in the Main POS screen.

Settling Using Staff Bank

When an employee uses Staff Bank, their settlement options change a bit. In the Order Entry screen, the "Cash Tender" and "Settle" buttons become a "Staff Bank" button. When this button is clicked, the Settle screen displays, allowing you to settle the order to your staff bank. You also have the option to "Pay to Staff Bank" in the Recalled Order screen.

To settle using the Order Entry screen method, follow the steps below. These steps assume you are in the Order Entry screen and have the order you wish to settle open.

1. Click on the "Staff Bank" button. This displays the Settle Order screen.
2. Click on the payment method you wish to use.
3. Enter the amount the customer is paying. This Change Due screen displays.
 - a. When using Frequent Diner tracking, click "Freq Diner Track" on the Change Due screen.

To settle using the Recall Order method, follow the steps below. These steps assume you have created an order.

1. Click “Recall” on the Main POS screen.
2. Enter your access code. This displays the Recall Order screen.
3. Click on the order you wish to recall.
4. Click on “Pay To Staff Bank.”
5. From here, settle the order as usual.

Settling Using Driver Money Drop

If you are using the Driver Money Drop feature, you must pay all orders that are not cash before using it. Since Credit Cards and Checks are not supported with the money drop feature, these must be settled separately.

To use the Driver Money Drop feature, follow the steps below. These steps assume you have delivered orders, are using the Driver Dispatch screen, and have orders to settle.

1. Make sure you have settled any orders paid by check or credit card.
 - a. This step must be completed before using the money drop feature.
2. Click on “Driver” in the Main POS screen.
3. Highlight your name and click “Money Drop.” This prompts for the access code of the staff bank or cashier that is receiving this payment.
4. The Driver Money Drop Report displays. You can either print it or click “OK.”
5. A confirmation of the orders being settled to the Staff Bank or Cash Drawer displays.

Chapter 20

Closing Procedures

Closing the Cash Drawer

When all orders are settled, the cash drawer must be counted and closed from the system.

To sign out a cashier, follow the steps below. These steps assume you have closed all orders.

1. Click the “Cashier Out” button on the Main POS screen and enter your access code.
2. Select the cash tray to be signed out.
3. (Optional) This displays the Adjust Gratuity Screen. To adjust the gratuity, highlight the order and click Adjust Gratuity. Enter the amount. After the amount is entered, you can process the tip and continue on to the next order or on to the Money Count screen.
4. The Money Count screen appears with all of the charges and checks received.
5. Verify all checks and charges and check them off on the Money Count screen. Enter all of the cash that is in the drawer. This includes Manager Cash Out receipts.
6. Click the “Finish” button. If there is a discrepancy in the drawer, the Register Discrepancy screen appears and shows the discrepancy amount. Enter the reason for the discrepancy and click the “Accept” button. This deactivates the cash register features for this station.



Tech Tip: All Credit Card Tips should be removed before completing the Cashier Sign Out process. If you leave the credit card tips in the drawer, the drawer will be over by the amount of the tips.

Quick Sign Out

Use the Quick Sign Out feature when you need to quickly switch a drawer or move to another station. This feature is useful to switch out a drawer and sign it back in at a station in a manager’s office for safe counting of the money. This is an easy way of relocating a cash tray to another station for any reason.

1. Click the “Cashier Out” button on the Main POS screen and enter your access code.
2. Select the cash tray to sign out.
3. (Optional) Click “Done” to bypass the gratuity screen.
4. Click “Cancel” on the Money Count Screen.
5. Select “Quick Sign Out (No Money Count Performed).”
6. After the cash tray has been through a quick sign out, the cash tray is available for a quick sign in. Only the employee that did the Quick Sign Out will be able to sign the tray back in.

7. Select the “Revert Quick Cashier Out” button to activate this cash tray once again for this employee on this station.

Closing Your Staff Bank

If you used Staff Bank during the day instead of a cash drawer, you must close your staff bank. To be able to close your staff bank, you must have already closed all your orders or transferred them to another server.

To end your staff bank, follow the steps below. These steps assume you have closed all your orders and do not have any open orders outstanding.

1. Click “Time Card” on the Main POS screen.
2. Enter your access code.
3. Click on “End Staff Bank.” This displays the Staff Bank Liability Report.
 - a. You can either print it or click “OK” to go the next screen.
4. Click “OK.” The Money Count screen displays.
5. Enter the amount of each denomination you are turning in.
6. Click “Finish.” This displays the Money Count Confirmation screen.
7. Click “Yes” or “No” to either complete this transaction or go back to edit the amounts.

Once you have closed your staff bank, check with the shift manager to go over the Staff Bank Liability Report to make sure your amounts are correct.

Clocking Out

To clock out, follow the steps below. These steps assume you are clocked in and all your orders are settled.

1. Click the “Time Card” button on the Main POS screen.
2. Enter your access code. This displays the Employee Time Card screen with the name and job title of the employee.
3. Click “Clock Out.” Your clock out time displays.
 - a. If you still have open orders, you are asked to transfer them to another server.

Running A Closing Report

The Closing Report shows the sales and other important closing information about your restaurant for the report date. The closing report should be run every day and **must** be run if the inventory system is used.

To run a Closing Report, follow the steps below. These steps assume you have closed all orders, closed all cash drawers and staff banks, and everyone has clocked out.

1. Click “Operations” on the Main POS screen.
2. Enter your access code.
3. Click on “Revenue Center.”
4. Click on “Closing Report.” Select a date on which to report.

5. Use the Year, Month and Day buttons to select the data you wish to report on and click “Select.”
6. Click “Yes” or “No” when asked if you wish to review the access denied logs.
 - a. If you have not closed all your cash drawers and staff banks, you are notified which banks are still open. These must closed before a final report can be generated.
7. The Closing Report displays. You can print it or just view it and click “OK.”
 - a. Several sections of the closing report are turned off by default. To view these sections, change the value of the registry to “YES” or “NO,” depending on your desired result.
 - i. **Daily Closing Hide Employee Time Cards**
 - ii. **Daily Closing Hide Gratuity Recap**
 - iii. **Daily Closing Show Tender Details**

Chapter 21

Manager Operations

Time Cards

Editing Time Cards

When employees make mistakes on their time cards, the time cards should be adjusted to reflect the correct times. This is done by editing the time card in the Edit Unpaid Time Cards screen.

To edit unpaid time cards, follow the steps below. These steps assume an employee has clocked in and out at least once.

1. Click on “Time Cards” in the Main POS screen. This displays the Employee Time Card screen with the employee’s name at the top. If you are a manager, click on “Edit Time Cards.” This displays the “Edit Unpaid Time Cards” screen.
2. On the left, highlight the name of the employee name whose time card needs changing.
3. Below the employee name list, highlight the date you wish to edit. The corresponding time card displays.
4. When you click inside the “Clock-In Time” field, it turns green. When the field is green, the field is active and may be edited.
5. Use the Hour, Minutes, and Date buttons to change the time in the field.
6. Click and edit each field that must be changed.
7. Click “Save.” You are prompted to confirm the changes.

Orders

Reverting or Re-Opening an Order

If an order has been closed and must be re-opened, you can revert to the order and change its status back to open. This allows you to make changes to the order. This is a manager only function and should be protected from normal employees.

To revert to a closed order, follow the steps below. These steps assume you have created an order and settled it.

1. Click “Recall” on the Main POS screen.
2. Enter your access code.
3. Click “Open Order.” This changes the button to “All Orders”, which shows orders that have been settled. By default, settled orders are not shown.
4. Click the order you wish to revert. This displays the “Recalled Order” screen.

5. Click the “Re-Open Check” button. The system prompts you for a manager’s access code.
 - a. The security for this is called “Access Daily Closing Report” and is located in Back Office > Security Settings.
6. Enter a manager access code. Confirm that you wish to re-open the check.
7. The check is now editable and has a “Partial Payment” status set.
 - a. The status is “Partial Payment” because the payment has been applied to the order but it is no longer closed.

You are now able to treat this order like a normal order. If you need to change the amount paid, first remove the current payment from the order. Do this by clicking on the Red button next to the payment.

Cash Drawers

Reverting or Re-Opening a Cash Drawer

If you have closed a cash drawer and need to adjust it, you can revert the cash drawer back to an open status. You can only revert cash drawers that are less than 3 days old. If it is 3 days old or older, you cannot revert it for any reason.

To revert a cash drawer, follow the steps below. These steps assume you have closed a cash drawer or Staff Bank and it is less than 3 days old.

1. Click “Operations” on the Main POS screen.
2. Enter your access code.
3. Click on “Revenue Center.”
4. Click on the “Re-Open Cashier” button. You are prompted to confirm the revert operation.
5. Click “Yes.”
6. Click on the bank you wish to re-open and confirm the action.
 - a. Make sure you have the correct bank by referring to the “Liab. #” on the buttons. Cross-reference this by using the Bank Liability option in Revenue Center.
7. Click “Yes” to confirm the operation.

Operations Center

Receive Payments Section

This section is used for receiving payments. There are three different choices for receiving payments in this section. Below are descriptions of what each of these choices do and how to use them.

Pay In-House Charges

This feature is used to collect payments on In-House Charge Accounts.

To make payments on In-House Charge Accounts, follow the steps below. These steps assume you have created a customer account, created an In-House Charge account, and paid an order using the In-House Charge account.

1. Click on the “Pay In-House Charges” button. This displays a search screen where you choose the search method.
2. Choose the search method to find the customer’s account. This displays the screen where you can make payments.
3. Review the orders to be paid. You can select them and print them for the customer to review as well. These statements will print on the receipt printer.
4. Select the payment type and enter the amount tendered. The change due screen appears and shows the change due (if any). The charges are paid off in the order in which they were placed (the oldest orders are paid first).

Pay Bad Checks

This feature allows you to collect payments on Bad Checks written to your restaurant.

To receive payment for a bad check, follow the steps below. These steps assume a bad check has been created in the system.

1. Click on “Pay Bad Checks.” This displays a screen allowing you to select the check you wish to receive payment on.
2. Select the check. Detailed information about the check displays, along with options on how it is to be paid.
 - b. You can also click the “Details” button for even more information regarding the check.
3. Select a payment source.
4. Select a payment method.
5. Click “Finish.”

Auto Pay All Open Deliveries

This feature allows you to pay all of the open delivery orders to the cashier using Cash as the form of payment. To use this feature, you must have the Blind Cashier Close Out box checked. This option can be found in the Back Office under Store Settings > Revenue > Cashier. The system assumes that all of the orders were paid in full for the correct amounts using cash.

To automatically pay all open deliveries, follow the steps below. These steps assume you have created delivery orders and have delivered them. They also assume you have checked the option named **Blind Cashier Close Out** in Store Settings > Revenue > Cashier.

1. Click on the “Auto Pay All Open Deliveries” button. This displays a confirmation window asking if you want to pay all delivery orders to the cashier.
2. Click “Yes” or “No.”

Revenue Center Section

This section is used to do various types of revenue collection and organization. Below are subsections for each of the features in the Revenue Center with descriptions on what each feature does and how to use it. You can access the Revenue Center by clicking the Operations button on the Main POS screen and going to Revenue Center.

Closing Report

For information on how to create a closing report, please see “Running A Closing Report” in Chapter 20 of this manual.

Next Day Transfer

This button is used to transfer all orders to the next business day. The time for the order is set to one second after the daily start time. This allows the restaurant to keep orders open but still be able to close the restaurant for the day. To use this feature, you must have the option called **24 Hour Operation Mode** set in Store Settings > Other.

Bank Liability Report

This feature allows you to review or print the Cashier/Staff Bank liability report. This report lists the cashiers’ names, when they signed in, when they signed out, and what orders they took.

To print out or view a Bank Liability report, follow the steps below. These steps assume you have started at least one cash drawer or staff bank.

1. Click on “Bank Report.” You are prompted you for the Bank Liability Number.
 - a. The Bank Liability Number may be obtained by using the Register Report, explained later in this section.
2. Enter the Bank Liability Number. This displays the liability report for the cash drawer or staff bank, whichever was used.

Register Report

This feature gives you a report of the register activities for all of the registers on the specified date.

To print out or view a Register Report, follow the steps below. These steps assume you have started at least one cash drawer or staff bank.

1. Click “Register Report.”
2. Choose a date and click “Select.” This displays the report, allowing you to review it.

Use the Bank Liability Number to display more detailed information about a Cash Drawer or Staff Bank.

Bank Deposit

This feature lets you count the bank deposit money and print out the deposit preparation receipt. In the Money Count screen, enter all of the money to be deposited to the bank. After you have completed the money count screen, click “Finish” to print the Bank Deposit Slip and the Bank Deposit Money Count receipts.

Gift Certificate List

This feature allows you to review a list of all of the gift certificates issued. To use this feature, click the Gift Certificate List button to review the information. To export the list, click the “Export” button. A confirmation window appears, confirming that the report was exported to a text file. Use a spreadsheet or word processing program to edit the report. To print the report, click the “Print” button.

Cust. Credit List

This feature allows you to view a list of all customer credits. This report can also be exported or printed.

Order Pmt List

This feature allows you to review the payment types and tender amounts of the orders the registers have collected. This report can also be exported or printed.

Bad Check List

This feature allows you to review a list of all the bad checks recorded in your restaurant. To see all bad checks, when you open the window, select the “Show All Checks” check box. To edit a bad check, highlight it and click the Edit button. To add a new bad check, click the “New” button and create the bad check file.

Daily Receipt Summary

This feature allows you to print out all the guest receipts for the specified business day. This is a very lengthy printout, so make sure you have enough paper in your receipt printer to do this. The guest receipts are printed in a condensed format to save paper and will be on one continuous page. Use this feature with caution. If you have a busy day and click this button, you may end up printing a whole roll of receipt paper.

Z Report

The Z Report shows the Total Net Sales up to date and, for security purposes, this number cannot be changed for any reason, even if orders are deleted from the database. Some countries require this report and we include it to comply with international laws. This feature allows you to run a Z Report based on the current up to date sales information or view a past Z Report based on the Z Report’s number. All orders must be closed out and all cashiers, including Staff Bank, must be signed out before a Z Report can be run. You can enable this report by going to Back Office > Help > Technical Support > F10 > Special Z Report. Change the value from “No” to “Yes.”

Re-Open Cashier Out

Re-opening a cashier that has closed his or her bank is useful to correct any mistakes discovered after the bank was closed.

To re-open a cashier, follow the steps below. These steps assume the cashier's bank is closed.

1. Click the "Re-Open Cashier" button.
2. On the Revert Signed Out Cashier screen, click "Yes."
3. Select the cashier to re-open from the Select Cashier Out Record screen. To be sure you choose the correct cash tray, check the Liab. # and match it to the number on the Cashier Liability Report.
4. On the confirmation screen that displays, click the "Yes" button.

Reverting or Re-Opening a Cash Drawer

If you need to adjust a closed cash drawer, you can revert the cash drawer back to an open status. You will only be able to revert cash drawers that are less than 2 days old. If it is 3 days old, you will not be able to revert it for any reason.

To revert a cash drawer, follow the steps below. These steps assume you have closed a cash drawer or Staff Bank and it is less than 2 days old.

1. Click on "Operations" in the Main POS screen.
2. Enter your access code.
3. Click on "Revenue Center."
4. Click on the "Re-Open Cashier" button. A prompt asks you to confirm the revert operation.
5. Click "Yes." This displays a screen allowing you to select the bank you wish to re-open.
6. Select the bank you wish to re-open.
 - a. Make sure you have the correct bank by referring to the "Liab. #" on the buttons. Cross reference this to the Bank Liability option in Revenue Center.
7. Click "Yes" to confirm the operation.

Re-Open Deposit

This feature is used to revert a bank deposit. To use this feature, select the "Revert Deposit" button. A confirmation window appears, and asks you to confirm that you want to revert a deposit. On the next popup window, enter the number of the bank deposit slip you wish to revert. A message confirms that the deposit was reverted.

Frequent Diner Section

New Freq. Diner

This feature is used to add a frequent diner account.

To add a new frequent diner, follow the steps below. These steps assume that an account has been created for the customer.

1. Click on the "New Freq. Diner" button.
2. Enter the customer phone number.

3. Fill in the customer information. The First Name and Last Name are required.
4. Click “Finish.”

This creates both a customer record and a frequent diner account for the customer.

Track Order

This feature is used to track orders for the frequent diner feature.

To track an order for the frequent diner program, follow the steps below.

1. Click on the “Track Order” button.
2. Enter the customer’s phone number. This will prompt you for the number of the order you wish to track.
3. Enter the order number you wish to track. A message window lets the user know that the order has been successfully tracked or that the order cannot be tracked.
 - a. If the order cannot be tracked, the order has not met the specified minimum requirements needed to qualify this order for the frequent diner feature.

Redemption

This feature manually controls the redemption of the frequent diner points that the customer has earned.

Follow the steps below to manually redeem credits for frequent diner orders. These steps assume orders have been tracked for use with the frequent diner system.

1. Click the “Redemption” button.
2. Enter the customer’s phone number.
3. Enter the credit amount to be given for this customer's orders.

Note: If you have automatic redemption or frequent diner-tracking points enabled, this procedure is done automatically.

Freq. Diner Acct. List

This feature displays a list of all frequent diner accounts with the total tracked orders and total tracked order amounts for each account.

In-House Charge Section

In this section you can review and maintain all of your In-House Charge Accounts. Access this section by clicking on Operations > In-House Charge. There are four subsections in this section. Below are descriptions of the subsections and how to use each of them.

Maintain In-House Accounts

This feature allows you to add or update current In-House Charge accounts. To use this feature, click the Maintain In-House Accounts button. The Maintain In-House Charge Account screen displays. Here you can pick the customer from the list to review their information. To add a new

account, click the “New” button and enter the customer’s information. Click the “Save” button to save the changes. When finished, click “Done.”

Create In-House Statement

This feature allows you to issue statements to the customer for accounts that are due.

To create statements for your In-House Accounts, follow the steps below. These steps assume you have created at least one In-House Account for a customer and there are charges on that account.

1. Click on “Create In-House Statement.”
2. Select the accounts you wish to generate statements for. Multiple accounts may be selected.
3. Click “Done.” The statements appear on the preview screen.
4. There are several options on this screen.
 - a. “Previous” navigates to the previous statement.
 - b. “Next” navigates to the next statement.
 - c. “Clear Current” removes this statement from the list displayed.
 - d. “Print Current” prints the statement currently being viewed.
 - e. “Print All” prints all the statements in the list.

These statements are arranged so that they fit in a normal business size window envelope.

In-House Account List

This feature allows you to review a list of all of your In-House Accounts. Click the “In-House Account List” button to display the report. It can be reviewed on-screen, printed, or exported.

Customer Files

This feature allows you to review all of your customer files. Click the “Customer Files” button to display the Maintain Customer Records screen. Here you can review the customers file by clicking the phone number in the list on the left side of the screen. To add a new customer file to the list, click the “New” button and enter the customer’s information. Click the “Save” button to save the changes.

Inventory Activities Section

This section allows you to review inventory items, purchase order information, and other reports. To access this section, click the “Inventory Activities” button in Operations. There are several buttons in this section. Below is a description of what each of these buttons does.

Shopping List

If you are using automatic inventory depletion and an inventory item falls below the Pack Size Reorder Point specified in the Inventory Items screen, the item is placed on the Shopping List. This list shows what items must be ordered to bring the inventory back to acceptable levels.

New PO (Purchase Order)

This feature allows you to create a new purchase order when ordering items from vendors. The fields are described below.

Purchase Order #: This is the number assigned to the purchase order. If it is a new purchase order, the field displays “New” until the purchase order is saved.

Account Number: Enter the account number for the supplier. This number displays while reviewing purchase orders.

Vendor Name: Enter the name of the vendor supplying the item(s).

Purchase Order Date: Enter the order date for the items.

Barcode Scan: Enter the item’s barcode information. The easiest way is to place the cursor in the Barcode Scan field and scan the UPC barcode on the item.

Inventory Item Name: Enter the name of the inventory item. As you type, the software attempts to guess the inventory item name based upon what is entered so far (auto-completion).

Quantity Ordered: Enter the quantity ordered.

Price Per Quantity: Enter the price per quantity of the ordered items.

When all information is entered, click the “Add” button to add the items to the list. Click the “Done” button when finished. To print the purchase order, click the “Preview” button, followed by the “Print” button.

Review PO

This feature allows you to review existing purchase orders.

To review an existing Purchase Order, follow the steps below. These steps assume you have created a purchase order.

1. Click “Review PO.”
2. On the Purchase Order Selection screen, select the purchase order to review by clicking the name of the purchase order, then clicking “Review.”
 - a. To delete a purchase order, select the name of the purchase order and click “Delete.”
3. Once in the purchase order screen, the purchase order may be edited.

Receive Items

This feature allows you to receive inventory items from your vendors. It records the items received from the vendor and calculates the inventory items’ quantities on hand and the costs per quantity.

To use the “Receive Items” feature, follow the steps below. These steps assume you have created a purchase order.

1. Click on the “Receive Items” button. This displays the Receive Inventory Items screen.
2. Select the date range by entering dates in the “Earliest PO Date” and “Received Date” fields.
3. Select the purchase order to receive from the drop-down list at the top of the screen.

4. Review the items on the purchase order. If all information is correct, click “Finish.”
 - a. If any information is incorrect or blank, highlight the item and click “Edit.”
 - b. To add an item that is not on the purchase order, click “Add.”
 - c. To remove an item from the purchase order, highlight the item and click “Remove.”
5. Once the list is complete and correct, click “Finish.”

Phy. Count Sheet

This feature prints a list of all your inventory items to use when performing a physical inventory count. The list shows the inventory item name, inventory location, calculated current quantity on hand, and a blank line where the actual counted quantity is entered. To use this feature, click the “Phy. Count Sheet” button to display the Physical Inventory Worksheet. You can view the sheet on-screen, export, or print it.

Phy. Inv. Count

Use this feature to record the physical inventory count actually on hand.

To record your physical inventory, follow the steps below. These steps assume you have inventory entered in the system.

1. Click on the “Phy. Inv. Count” button. This displays the Physical Inventory Count screen.
2. Highlight the inventory item you wish to enter a new quantity for.
3. Enter the new quantity on hand in the “New Qty” field.
 - a. This is the total quantity you now have on hand, not the quantity you are adding.
4. When finished, click the “Record” button.
 - a. Once you click “Record,” the system exits the screen.

If you scan all your inventory items into a scanning device, export that information to a text file on your computer. You can then click the “Inv. Download” button and choose that text file containing the scanned inventory items. Click the “Download” button to import the file to the software and show the actual physical inventory.

Inv. Prep. Forecast

This feature prepares a report that shows how many of each item’s inventory units the kitchen should prepare for the day. This information is based on the past inventory usage history for up to the prior six weeks for the same day of the week. Please note that proper menu recipes and inventory depletion must be defined and enabled for this feature to work.

To use this feature, click on the “Inv. Prep. Forecast” button to display the report. The report may be exported or printed.

Inventory Items

This feature allows you to create and maintain your inventory items. To use this feature, click the “Inventory Items” button to display the Inventory Items screen. Inventory items can be

reviewed or edited. New items may be added by clicking the “New” button. Enter the information for the new inventory item and click “Save.” For more information on using this

feature, see Information Data Entry – Inventory Setup – Inventory Items in Chapter 5 of this manual. This feature may also be accessed from the Back Office by navigating to **Setup > Inventory Setup > Inventory Items**.

Menu Recipe

Here you define the menu recipes for your menu items. You must create menu recipes when you use Inventory Depletion. To use this feature, click the Menu Recipe button to display the Menu Recipe Editor screen. For more information on using this feature, see Information Data Entry – Inventory Setup – Menu Recipe Editor in Chapter 5 of this manual. This feature may also be accessed from the Back Office by navigating to **Setup > Inventory Setup > Menu Recipe Editor**.

Other Tools Section

This section contains several options not accessible through other parts of the software, and provides shortcuts to other features in the Back Office. To use this section click **Operations > Other Tools**.

Caller ID Log

This feature allows you to review the entire Caller ID Logs (as long as you have your Caller ID configured and working). To use this feature, click the “Caller ID Log” button to display the Caller ID Log screen. Review the logs on this screen by highlighting a call and clicking the “Details” button.

Caller ID Switch

This feature is used to turn your Caller ID on and off. If you have the Caller ID feature configured in your system, you do not have to worry about this button.

Customer Incidents

This feature allows you to record bad calls to your restaurant. Click on the “Customer Incidents” button and enter the phone number that the call came from. The New Customer Incident screen appears, allowing you to enter the number of the order in the Order # field, whether any food was wasted due to the call, and any details about the bad call. This information displays in the Customer Information screen while entering Take Out or Delivery orders. The “Customer Incidents” button flashes, warning that this customer has caused problems before. Click on this button to see the details of the incident.

Assign Table

This feature allows a manager to assign tables to servers without going into the Back Office. The same security level required to run a closing report allows access to this feature.

To Training Mode

This feature is used to turn the training mode on and off. To use this feature, click the “To Training Mode” button to display the confirmation screen. When you click “Yes,” a

confirmation window appears, confirming that you are now in training mode. To switch back to live mode, click the “To Live Mode” button (this button appears in the same screen location where the “To Training Mode” button was previously). When the confirmation screen appears, click “Yes.” Another confirmation window appears, confirming that you have now reverted to live mode.

Note: If you notice that your training database is not up to date, navigate to the directory where Aldelo® For Restaurants is installed and delete the Training.mdb file. This forces the software to create another Training database file using the current information in you live database.

Edit Work Schedule

To use this feature, click the “Edit Work Schedule” button and select the employee whose schedule you wish to change. For more information on using this feature, see Information Data Entry – Employee Setup – Employee Schedules in Chapter 5 of this manual. This feature may also be accessed from the Back Office by navigating to **Setup > Employee Setup > Employee Schedules**.

Add Cash To Bank

This feature allows you to add money to the start amount of either a Staff Bank or a Cashier. To use this feature, click the “Add Cash To Bank” button and enter the Bank Liability Number. You are prompted to enter the amount to add to the bank start amount. Enter the amount and click “Enter.”

Calculator

This feature is a shortcut to the Windows® Calculator. To use this feature, click the “Calculator” button.

Emp. Still Working

This feature allows you to review a list of all the employees still working (clocked in). To use this feature, click the “Emp. Still Working” button to display the Employee Still Working Report. The report displays the employees’ names, the dates that they clocked in, and times that they clocked in.

Driver Summary

This feature gives you a report of the driver’s net sales, delivery compensation, and number of deliveries. To use this feature, click the “Driver Summary” button. The report may be viewed, printed, or exported to a text file.

Open Order Report

This feature displays a list of all open orders and lists the server. Click the “Open Order Report” button to display the Open Order Report screen. Here you can review or print the report.

Menu Item Sales By Category

This feature allows you to choose a category and view menu item sales based on that category. You can also choose to view all categories to see a complete list of items in your restaurant. This

report shows quantity and sales information for the menu items. This report can be printed or exported.

Sales By Category Report

This feature generates a report of sales listed by category. This is a shortcut to the Sales By Category Report in the Back Office.

Sales By Menu Item Report

This feature generates a report of sales listed by menu item. This is a shortcut to the Sales By Menu Item Report in the Back Office.

Server Gratuity Report

This feature generates a report of the tips each server made for the specified date. This is a shortcut to the Server Gratuity Report in the Back Office.

Chapter 22

Maintenance Activities

General Activities

This section describes the different manager functions in the Back Office of Aldelo® For Restaurants. These items are listed on the menu bar under “Activities.”

Pay Employees

Aldelo® For Restaurants has a simple form of payroll and can assist in the generation of the information you need to pay your employees. It does not calculate taxes or perform advanced deductions; it is simply a way to generate a statement for the hours worked, overtime hours, and wages earned.

To generate a payroll, follow the steps below. These steps assume you have employees with time card information.

1. Click the “Pay Employees” button in the Back Office to display the Pay Employees screen.
 - a. You can also reach this screen from the Activities section under General Activities.
2. Select the employees you want to prepare a payroll for.
 - a. Use the single arrow for one employee, the double arrow for all employees.
3. Fill in the “Pay Period End Date.” Use the format MM/DD/YYYY.
4. If there is any additional pay due an employee, select the employee on the right and click “Additional.” The system prompts for the amount due this employee in addition to their pay.
5. Click “Preview.” Review the report to check for mistakes and print it out.
6. Once everything is correct, click “Pay.”

If you generate a payroll by mistake, you can undo the previous payroll. Only one payroll can be rolled back; you cannot roll back a payroll prior to the current payroll.

New Local E-Mail

As a way to communicate to other employees, Aldelo® For Restaurants has an internal e-mail system. This system does not communicate with the internet but stores messages internally.

To send an e-mail to an employee, follow the steps below.

1. Click on “New Local E-mail.” This displays the New Local E-mail Message screen.
2. Use the drop-down list under “To Employee(s)” to filter the job type of the employees you wish to e-mail.
3. Select the employees you wish to e-mail.
4. Select the employee from the drop-down list of who the e-mail is from.

5. Type a message in the “Message” field.
 - a. Use the “Keyboard” button to enter this if a hardware keyboard is not available.
6. Click “Send.”

Review Local E-Mail

As a manager, you may want to keep track of your employees’ communications between each other to make sure the system is not being abused.

To review e-mails sent by employees, follow the steps below. These steps assume e-mails were created.

1. Click on “Review Local E-mails.” This is listed under Activities > General Activities in the Back Office. The Local E-mail Maintenance screen displays.
2. Select the employee you wish to review.
3. Click “Read E-mail.” This displays the Local E-mail Viewer screen.
4. Select the e-mail message from the E-mail Messages section. The e-mail displays on the right.

Video Surveillance Control Center

This feature is only available if you have a web cam installed and have checked the Enable Video Surveillance Captures check box under the General tab in Station Settings. To use the Video Surveillance Control Center, navigate to the Back Office under Activities > General Activities.

Inside the Video Surveillance Control Center, there are three buttons: “Snapshot,” “Preferences,” and “Close.”

Snapshot: Takes a snapshot of what the camera is currently focused on.

Preferences: The checkboxes in Preferences allow you to choose when you do not want the camera to take a snapshot. For example, if you do not want the system to take a snapshot of a No Sale action, select the Disable No Sale Watch checkbox. Under Preferences, there are four other buttons titled Compression, Display, Format, and Source. Use these to adjust your camera settings for the best picture quality. Under the Format option, we recommend using 320 x 240 for the Resolution and RGB 555 (16bit) for the Pixel Depth (bits) and Compression. The last two options in the Control Center are the two delete functions. The first allows you to specify how many days you want to pass before old snapshots are deleted, and the second deletes all snapshots currently in the folder.

Video Surveillance Review Browser

This feature is used to review the pictures captured by the system. The Video Surveillance Review Browser features can be found in the Back Office under Activities > General Activities. To use this feature, select the type of pictures to review from the Look In drop-down list. Select the picture from the list at the bottom of the window to display it.

Create Menu Item Labels

To generate stickers for menu items, use the menu item label generator. This feature searches for all items with barcodes and prints a label to stick on the item.

To print barcode labels for menu items, follow the steps below. These steps assume you have an Aldelo certified label printer and are using 1" x 3" labels.

1. Click on "Create Menu Item Labels." To display the Menu Item Label Generator.
2. Choose either "All Menu Items with Barcode" or "Select Menu Items with Barcode."
 - a. If you choose "Select Menu Items with Barcode", you can filter by Menu Category or by Menu Group.
3. Click "Search."
4. Select the items you wish to print labels for.
5. Enter the number of copies you wish to print and click the "Print" button.

Maintain Pay Outs

Pay Out Date/Time: This field allows you to view the date and time the Pay Out was issued.

Cashier Name: This field allows you to identify the cashier who issued the Pay Out.

Cash Tray#: This field allows you to view from which cash tray the Pay Out was issued.

Authorized By: This field allows you to view who authorized the Pay Out.

Pay Out To: This field allows you to view to whom the Pay Out was given.

Pay Out Amount: This field allows you to view the amount of the Pay Out.

Pay Out Details: This field allows you to view the details entered when the Pay Out was issued.

Wage Advance For: This field allows you to view who received a Wage Advance.

Pay Out Voided: This option allows you to void a Pay Out if it was entered by mistake.

Void Reason: This field allows you to enter the reason the Pay Out was voided.

Maintain Manager Cash Outs

Cash Out #: This field allows you to view the number the software assigned to the cash out record.

Cash Out Date/Time: This field allows you to view the date and time the manager performed the cash out.

Cash Out By: This field allows you to view who performed the cash out.

Cash Out Amount: This field allows you to view the cash out amount.

Station Number: This field allows you to view which station performed the manager cash out.

Cashier Name: This field allows you to view which employee was signed in when the manager cash out was performed.

Cash Tray #: This field allows you to view which cash tray the manager cash out used when it was performed.

Bank Liability Report #: This field allows you to view which Bank Liability report number was used to perform the manager cash out.

Cash Out Voided: This option allows you to void the manager cash out.

Void Reason: This field allows you to enter a reason for voiding the manager cash out.

Global Menu Item Price Change

To do batch updates on your menu item prices, use the global menu item price change feature. This screen allows you to adjust menu item prices very quickly and in many different ways.

To change prices on menu items using the Global Menu Item Price Change screen, follow the steps below. These steps assume you have created a couple of menu items.

1. Click on “Global Menu Item Price Change.” This will bring up the Global Menu Item Price Change screen.
2. Select the group in which you wish to make changes (or select All Menu Groups).
3. Select the items to be changed.
4. Select the change option.
 - a. Markup By Percent
 - b. Markup By Amount
 - c. Markdown By Percent
 - d. Markdown By Amount
 - e. Amount
 - i. Use the “Amount” field to specify the amount of the new price.
5. Click “Update.”
 - a. The results display in the Price Change Results section.

Note: Be careful with this feature. Changes are permanent and cannot be reversed.

Export Menu Item Sales

This feature exports sales information about menu items to a CSV text file. Below is a sample of the text file. The fields (from left to right) are Menu Item ID, Qty ordered, total sales, 1 (a place holder), Menu Item Name, Menu Group Name, Menu Item Price

```
250, 1.000, 3.95, 1, Onion Rings, Appetizers, 3.95
251, 3.000, 14.85, 1, Nachos, Appetizers, 4.95
252, 6.000, 35.70, 1, Potato Skins, Appetizers, 5.95
253, 7.000, 55.65, 1, Shrimp Cocktail, Appetizers, 7.95
254, 9.000, 35.55, 1, Fried Zucchini, Appetizers, 3.95
255, 23.000, 113.85, 1, Fried Mozzarella, Appetizers, 4.95
256, 6.000, 29.70, 1, Quesadilla, Appetizers, 4.95
257, 8.000, 55.60, 1, Chicken Tenders, Appetizers, 6.95
258, 7.000, 55.65, 1, Lemon Pep. Shrimp, Appetizers, 7.95
259, 4.000, 31.80, 1, Cajun Shrimp, Appetizers, 7.95
260, 0.750, 0.92, 1, Stuft Jalapeno, Appetizers, 1.23
```

Customer Activities

Maintain Customer Records

Phone Number: Enter a phone number for this customer.

Customer Name: Enter a customer name for this account.

Delivery Address: Enter an address for this customer to be used when making deliveries.

Cross Street: Enter a cross street name for the delivery address.

Postal Code: Enter a postal code for the delivery address.

Delivery Charge: Enter a delivery charge for this customer.

Delivery Compensation: Enter the delivery compensation paid to the driver when delivering to this customer.

Delivery Remarks: Enter any delivery remarks for this customer.

VIP: Select the VIP level for this customer. You can set the different VIP level discounts in the Registry Settings of the software.

Customer Notes: Enter any customer notes associated with this customer.

MSR Card: Assign an MSR Card to this customer. It is used when doing a search for a customer.

Account Code: Enter an account code for this customer. It is used when doing a search for a customer.

Create Customer Address Labels

If you have customers that you want to generate stickers for, use the customer address label generator to print them. This searches for all customers and prints a label to stick on customer mailings.

To print address labels for customers, follow the steps below. These steps assume you have an Aldelo certified label printer and are using 1" x 3" labels.

1. Click on "Create Customer Address Labels" to display the Customer Address Label Generator.
2. Choose either "All Customers with Mailing Address" or "Select Customer with Mailing Address."
 - a. If you choose "Select Customer with Mailing Address," you can filter by:
 - i. Postal Code
 - ii. Area Code
 - iii. Anniversary Month
 - iv. Highest Spending Customers
 - v. Lowest Spending Customers.
3. Click "Search."
4. Select the customers you wish to print labels for.
5. Enter the number of copies you wish to print.
6. Click "Print."

Maintain In-House Charge Accounts

Customer Phone Number: Enter a phone number for this account.

First Name: Enter a first name for this account.

Last Name: Enter a last name for this account.

Mailing Address: Enter the mailing address for this customer's account.

Mailing Postal Code: Enter the postal code for the mailing address.

Tax Account Number: Enter a social security number or equivalent for this account.

Driver's License Number: Enter a driver's license number for this account.

Driver's License Expires: Enter an expiration date for the driver's license.

Credit Limit: Enter a credit limit amount for this customer. This works like a credit card.

Credit Account Expires: Enter an expiration date for this account.

MSR Card: This field allows you to assign an MSR Card to this account.

Credit Account Status: The drop-down menu allows you to set the status of the account: Active, Past Due, or Closed.

Credit Account Notes: Enter any notes about this account.

Create In-House Charge Statements

This feature allows you to issue statements to the customer for accounts that are due.

To create statements for your In-House Accounts, follow the steps below. These steps assume you have created at least one In-House Account for a customer and there are charges on that account.

1. Click on "Create In-House Charge Statement." This displays a list of In-House Accounts.
2. Select the accounts you wish to generate statements for.
3. Click "Done" to display the statements. There are several options on this screen.
 - a. "Previous" navigates to the previous statement.
 - b. "Next" navigates to the next statement.
 - c. "Clear Current" removes this statement from the list of statements currently being viewed.
 - d. "Print Current" prints the statement currently being viewed.
 - e. "Print All" prints all the statements in the print list.

These statements are arranged so that they fit in a normal business size window envelope.

Maintain Frequent Diner Accounts

Customer Phone Number: Enter a phone number for this account.

First Name: Enter a first name for this account.

Last name: Enter a last name for this account.

Mailing Address: Enter a mailing address for this account.

Mailing Postal Code: Enter a postal code for the mailing address.

MSR Card: This field allows you to use MSR Cards for this Frequent Diner Account.

Email: Enter an e-mail address for this customer.

Maintain Frequent Diner Tracking

To see how a customer is doing with their frequent diner account, use this feature to view orders outstanding orders that have not been redeemed.

To see customers' orders that have not been redeemed in the frequent diner program, follow the steps below.

1. Click on "Maintain Frequent Diner Tracking."
2. Enter the customer phone number. This displays the Maintain Unredeemed Frequent Diner Tracking Points screen.
3. View the information on this page or click "Remove" to remove selected orders from the list.

Maintain Customer Credits

Credit Number: This field allows you to view the number assigned to the credit by the software.

Issue Date/Time: This field allows you to view the date and time the credit was issued.

Customer Phone Number: This field allows you to view the credit customer's phone number.

Issued By Employee: This field allows you to view the employee that issued the credit.

Credit Type: This field allows you to view the type of credit issued to the customer.

Credit Amount: This field allows you to view the amount of the credit that was issued.

Credit Expires: This field allows you to view the expiration date of the credit, if there is one.

Credit Reason: This field allows you to view the reason given for issuing the credit.

Credit Limitations: This field allows you to view the limitations that were placed on the credit.

Credit Status: This drop-down allows you to edit the credit status: Active, All Redeemed, or Voided.

Void Reason: This field allows you to enter the reason the credit was voided.

Maintain Gift Certificates

Gift Certificate Number: This field allows you view the Gift Certificate Number assigned by the software. Use this number to redeem the Gift Certificate.

Issued Date/Time: This field allows you view the date and time the Gift Certificate was issued.

Account Number: This field allows you to view the number assigned to the Gift Certificate. Use this number to redeem the Gift Certificate if you are not using MSR cards.

Authorized By: This field allows you to view who authorized the Gift Certificate.

Issued To: This field allows you to view to whom the Gift Certificate was issued.

Presented By: This field allows you to enter the name of the person presenting the Gift Certificate. This is used when the Gift Certificate is given as a gift.

Issued Amount: This field allows you to view the dollar value assigned to the Gift Certificate.

Expiration Date: This field allows you to view the expiration date of the Gift Certificate, if applicable.

Status: This drop-down allows you to set the Gift Certificate status: Active, All Redeemed, or Voided.

Void Reason: Enter a reason for voiding the Gift Certificate.

New Bad Check

When a customer writes a bad check, this feature allows you to make a record of it in the software. If the customer presents another check in the future, the system warns the user that the customer wrote a prior bad check. A decision can then be made as to whether to accept the new check. Simply fill in all the requested information for the bad check and click “Finish.”

Follow Up Bad Check

This screen allows you to select a check to follow up on or edit. Once selected, you can edit the information concerning the check in the same Bad Check Editor screen used to record a new bad check. A new bad check may also be recorded from this screen.

Inventory Activities**New Purchase Order**

This feature allows you to create a new purchase order when ordering items from vendors. For more information on using this feature, see Operations Center – Inventory Activities Section – New PO (Purchase Order) in Chapter 21 of this manual. This feature may also be accessed from the Main POS screen by navigating to **Operations > Inventory Activities > New PO.**

Review Purchase Order

This feature allows you to review existing purchase orders. For more information on using this feature, see Operations Center – Inventory Activities Section – Review PO in Chapter 21 of this manual. This feature may also be accessed from the Main POS screen by navigating to **Operations > Inventory Activities > Review PO.**

Create PO From Shopping List

If you have a large shopping list, use this feature to create purchase orders quickly for your vendors.

To create purchase orders for all vendors using the shopping list, simply click on “Create PO From Shopping List” to display the shopping list.

Create Inventory Item Labels

If you have inventory items that you want to generate stickers for, use the inventory item label generator to print them. The system searches for all items with barcodes and prints a label to stick on the item.

To print barcode labels for inventory items, follow the steps below. These steps assume you have an Aldelo certified label printer and are using 1” x 3” labels.

1. Click on “Create Inventory Item Labels” to display the Inventory Item Label Generator.

2. Choose either “All Inventory Items with Barcode” or “Select Inventory Items with Barcode.”
 - a. If you choose “Select Inventory Items with Barcode,” you can filter by Inventory Vendor or by Inventory Group.
3. Click “Search.”
4. Select the items you wish to print labels for.
5. Enter the number of copies you wish to print.
6. Click “Print.”

Receive Inventory Items

This feature allows you to receive inventory items from your vendors. For more information on using this feature, see Operations Center – Inventory Activities Section – Receive Items in Chapter 21 of this manual. This feature may also be accessed from the Main POS screen by navigating to **Operations > Inventory Activities > Receive Items**.

Physical Inventory Count

Use this feature to record the physical inventory actually on hand. For more information on using this feature, see Operations Center – Inventory Activities Section – Phy. Inv. Count in Chapter 21 of this manual. This feature may also be accessed from the Main POS screen by navigating to **Operations > Inventory Activities > Phy. Inv. Count**.

Maintenance Activities

Monitor Client Connections

This feature allows you to view all of the clients connected to the network. It also allows you to shut down any clients that are not connected but are preventing the software from allowing you to compact or backup the database. This feature is accessed from the Back Office under the **Activities > Maintenance Activities**. Once you are in the Aldelo® For Restaurants Client Connection Monitor, the

maximum number of clients allowed is shown at the bottom of the window in green. Just below the maximum number is the number of clients currently logged onto the system. If the window shows that a client is logged on, but Aldelo® For Restaurants is not running on that client’s computer, put a check in the box for the client that is not connected and click the “Shut Down Client” button. This removes that client from the connections.

If you ever get a message that says, “You have exceeded your max number of licenses,” you must shut down the client that the system thinks is connected but is not. To do this, follow the steps mentioned above.

Remove All Access Denied Logs

This feature allows you to delete all of the access denied logs. This feature is found in the Back Office under **Activities > Maintenance Activities**. It deletes all Access Denied recordings, and may shrink the database size. After cleaning up the Access Denied Logs, compact the database to increase its efficiency.

Remove All Caller ID Logs

This feature allows you to delete all of the Caller ID logs. This feature is found in the Back Office under **Activities > Maintenance Activities**. It deletes all Caller ID recordings and reduces the database size. After cleaning up the Caller ID logs, compact the database to increase its efficiency.

Remove All Customer Names From Orders

This feature allows you to remove all of the names from a specified customers' orders (perhaps due to the customer's request). This feature is found in the Back Office under **Activities > Maintenance Activities**. Once selected, a popup window appears and prompts you to enter the customer's phone number. Enter the phone number of the customer whose name you wish to delete from the orders. Upon completion, a confirmation window appears, displaying how many names were deleted.

Remove All Redeemed Gift Certificate MSR Card Information

This feature allows you to remove all of the swipe card information for redeemed gift certificates. This feature is found in the Back Office under **Activities > Maintenance Activities**. After selecting this choice, a confirmation screen appears asking if you want to remove all scan codes from redeemed gift certificates. Click the "Yes" button. The next window confirms that all of the scan code information was deleted successfully. MSR Card information that is already redeemed is automatically deleted from the system every time the software is restarted.

Remove Prior Manager Cash Outs

This feature allows you to remove the entire prior manager's cash out information. This feature is found in the Back Office under **Activities > Maintenance Activities**. You are prompted to enter a date using the month, day, and year buttons. Anything prior to this date is removed from the system.

Remove Prior Reservations

This feature allows you to remove all the prior reservation information. This feature is found in the Back Office under **Activities > Maintenance Activities**. You are prompted to enter a date using the month, day, and year buttons. Anything prior to this date is removed from the system.

Delete Master Data

This feature allows you to delete database entries that have never been used or were errors when creating the database. Select the category, then select the items to delete. If the item is in use by the system, a message displays stating that the record cannot be deleted. Compact the database immediately after using this feature.

Note: This feature is particularly useful when you finish creating your database before your restaurant opens, to remove any unnecessary entries.

You may only delete items that have no sales associated with them. If the item has ever been used to perform a sale, been attached to another database item, or has any links whatsoever, it must remain in the database forever. The only other option is to dump all your sales to free the items and unlink them so they can be deleted. Make sure the object does not have a forced modifier connected to it.

Refresh Cumulative Grand Total

This option recalculates the total sales when using the Show Non-Resettable Grand Total feature in **Store Settings > Other**.

Third Party Add Ins

New

When you click this, you open a file with the following information.

Instructions:

- 1) To create a Menu Separator, enter DASH PIPE DASH.
- 2) To enter Menu Command, enter DESCRIPTION, then PIPE, then the EXECUTABLE PATH.

====> Enter Menu Commands Starting The Following Line <====

New|CurrentPath

-|-

Calculator|C:\WINDOWS\System32\calc.exe

Notepad|C:\WINDOWS\System32\notepad.exe

This allows you to create links to other programs. This does not integrate the programs, but allows you to open the program from within Aldelo® For Restaurants.

Calculator

This opens the Windows® Calculator.

Notepad

This opens Windows® Notepad.

Chapter 23

Database Maintenance

Database & Support Files

Below is a list of some of the files and explanations of what they are and do.

adResSettings.dat

This file contains the Store Settings for your database. Anytime you perform a backup, this file is copied along with the database. In addition, anytime an error occurs in your software, this file helps the Aldelo Technical Support Team to shorten the time it takes to troubleshoot the issue with your system. If you are encountering an error, call us and arrange to send this file by e-mail.

adResISV.dat

This file contains the external software links, such as the link to the Windows® Calculator. You can create your own links to other software programs that are installed on your computer by editing this file. For more information on adding an external software link, see Third Party Add Ins – New in Chapter 22 of this manual. Please note that if you enter a link to a different program, the program you are linking to must be installed on the local computer. The instructions on how to edit this file are in the file when you open it with notepad. The only item not mentioned in the instructions is the ‘&’ (ampersand) symbol. This is used to mark a letter as the hotkey for that word. Use the ‘&’ symbol before the letter you want to set as the hotkey. In addition, you may need to change the path name for the items already in the file to match your computer’s path for those programs.

adResHostess.dat

This file contains the settings for the Hostess functions of the software.

adRes.lang

This file contains the information used to display text in the software. If the software cannot connect to this file, Aldelo® For Restaurants displays buttons with no text.

Database Engine Used

Aldelo® For Restaurants uses the Microsoft® Jet 4 database engine.

Database Recommended Limits

The recommended database limits are that the database file cannot be larger than 2 gigabytes. There is no limit on the number of clients that can connect to the database, but performance suffers greatly if there are a large number of clients connected to a database located on a slow machine.

Compact Database

Periodically (for example, every two weeks), use the Compact Database feature in the Back Office. Compacting the database shrinks it and re-claims its unused space. This makes the database smaller, faster, and more efficient. To compact the database, go to the computer that holds the database. Close all other client stations connected to this database computer. Navigate to the Back Office and click “Compact Database” to start the compaction process. Once finished, you are notified that the compact process has been completed successfully.

Jet Compact Utility

If you must use the Jet Compact Utility, you can run it from within Aldelo® For Restaurants. Go to **Back Office > Help > Technical Support** and press F12 on the keyboard. Enter the password “05338942.” The software asks if all stations are shut down. Double check to make sure. Once all stations are shut down, follow the steps to perform the operation. This function creates a backup of the database before the compact is performed so that if anything goes wrong, all is not lost.

Backup Database

Backing up the database allows you to create backup copies of your database in case your live database becomes corrupted or unusable. You can only backup the database at the computer on which the database is locally stored. You cannot backup the database to a floppy drive. The device must be a Zip drive, a CD recorder drive, a tape drive, or the hard drive itself. The database is too large for a floppy. To back up the database, navigate to the Back Office and click on the “Backup Database” button. Select the folder where the backup database will be stored. We have provided a backup folder for your use in the Aldelo® For Restaurants folder during setup. After you have selected the folder for the backup, click the “Backup” button. After the backup is complete, a confirmation window displays a message that the back up is complete. The database, the adResSettings.dat, and the asResHostess.dat file are backed up. Keep these files safe and always keep a second location for the backup, just in case your primary backup is damaged.

You can also use the Windows® built-in backup software to schedule automated backup times so that you can snapshot your database at certain time intervals, or simply automate the once a day back up. This can also be accomplished through Aldelo® For Restaurants in Station Settings > General. Remember that the other stations must not be running Aldelo® For Restaurants when a backup is performed.

Chapter 24

Import/Export

Exporting Data

This feature allows you to export data to transfer to another blank database or into an existing database. To export the data, select the data to export and click the “Export” button. If you want to export the entire database, select “Export Entire Database.”

This creates a text file containing all the data you have chosen to export. This data is in a proprietary format and cannot be edited. The exported file is saved in the Export folder contained in the C:\Documents and Settings\All Users\Application Data\Aldelo Systems\Aldelo Data\Aldelo For Restaurants\Export directory.

Import Data

This feature allows you to import data that was exported from another Aldelo® For Restaurants database. If you try to import into a database that has existing data, it hides the information that cannot be imported. Simply create a new item and pick the menu items that have been hidden to bring them back. Follow the steps below to use the import feature.

1. Click “Import.”
2. Locate the export file and click “Open.”

Import New Resource Database

This feature allows you to import a new language database created in the Aldelo® Localization Utility. The name of the language database should be adRes.imp. This file contains all the strings for the software, allowing you to change them and customize your software. Refer to the Aldelo® Localization manual for more information on how to create new language databases.

Exporting Reports

Aldelo® For Restaurants allows you to export all of the built-in reports. Once inside the report, click the “Export” button. A confirmation displays indicating that the report has been saved to a .xls file in the programs directory under the Export folder. Use Microsoft® Excel to view or edit the exported file.

Chapter 25

Reports

Reports

Aldelo[®] for Restaurants contains a multitude of built-in reports available to the restaurant owner. These reports can be generated by navigating to **Back Office > Reports** from the main POS screen. Here you find the reports grouped by category. Simply click on a category and select the desired report.

For detailed information on each report, please see the Online Manual. The Online Manual can be found in the Aldelo[®] For Restaurants software from the main POS screen by navigating to **Back Office > Help > Online Manual**. Reports are found in “Chapter 25 – Reports.” You can access this section by finding it in the Table of Contents at the front of the Online Manual and clicking on the entry. This takes you directly to the corresponding page in the manual.

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