⦀PROXIS SOFTWARE

RESTAURANT

RESTAURANT POS SOFTWARE

USER MANUAL

Proxis Restaurant Point Of Sale System: R-System

Proxis R-System provides you the most cost-effective POS solutions from fast-service restaurants to full service restaurants and food service chain stores. R-System is consists of three software applications:

R-CORPORATE - RESTAURANT CHAIN MANAGEMENT
R-CORPORATE is used by corporate office of chain stores to manage inventory items, receive purchase requests from each individual restaurants, place orders, manage menu items, create promotions, generate performance reports of each restaurant and so on.

R-OFFICE - RESTAURANT MANAGEMENT
R-OFFICE is used by managers of each restaurant to manage inventory, table setting, menu items, reports, employee timesheets, discounts and promotions and purchase requests.

Proxis Restaurant - RESTAURANT POINT OF SALE
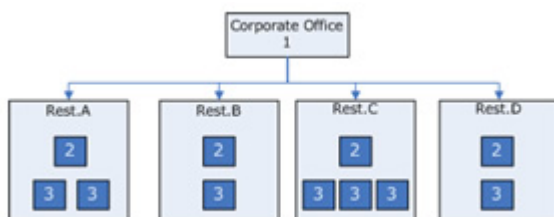Proxis Restaurant is the Point Of Sale application installed on the POS terminals in each restaurant .

Single Location Restaurant Setup:

1-R-Corporate
2-R-Office
3-Proxis Restaurant
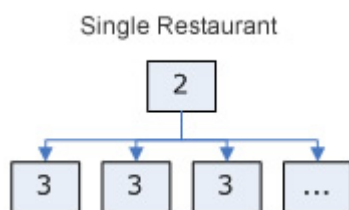
Chain / Multi-Location Restaurants Setup:
1-R-Corporate
2-Proxis Restaurant
3-R-Office

System Requirements

Hardware

Computer

- Processor with minimal frequency of 500MHz. Intel, AMD CPU recommended.
- Minimal memory of 128MB RAM. 512 MB RAM recommended.
- 20MB available hard disk space.
- Video card minimal resolution of 800x600 pixels with 32bit color. 1024x768 pixels recommended.
- Ports: 2 serial, 3 USB ports
- Microsoft WePOS, Windows 2000 Pro, XP Home/Pro, Vista

Receipt Printer

- Recomanded Receipt Printers: Bixolon 350plus, Epson TMT88 IV, SNBC2002NP, HP A794 and Star TSP-143U. We support these printers using either their Windows drivers or OPOS drivers.

- Other Receipt Printers: Bixolon Series, Epson TM88II or III; Mecury TM200; Itchta; Star TSP600-700, SNBC or any other Epson compatible printers. We only support these printers using their Windows drivers.

- Kitchen Printer: SAMSUNG Bixolon, SNBC, or Epson U22O Network Version or Epson compatible printers.

Other Hardware

- Uniforce R-System supports most major brands of cash drawers; MSR swipers and MICR readers (MagTek recommanded); PinPad; Barcode scanners; POS Scales; Pole displays and touchscreens.

Setting Up Proxis Restaurant / System Config

Open System Setting Window:

Click on the setting icon in the top main menu: to open the setting window.

Base Setting:

- Station Setup

  Station ID is used to identify each POS terminal in R-System.

  If "Admin required for setting" is checked, only users with Admin rights can modify these settings, otherwise, any user with Admin or Manager rights can make changes in the setting.

- Menu Buttons

  Here you can customize the size, color and font of the menu item button display. The menu

button background color, however, is edited in the R-Corp when you edit the Menu Items or Menu Items Catagories.

- <u>Load menus after application starting</u>

Choose this option will load the menus automatically after you log in Proxis Restaurant.

- <u>Use Memory Data</u>

Choose this option to load menus from the memory of your terminal station instead of the database. This will increase the speed of operation but will require more memory of your POS station computer.

- <u>Show cash changes</u>

After process the payment, the system can remind the operator the cash change of the last transaction.

- <u>Cash Register Style</u>

Choose this option will let you enter the currency amount without the decimal point: enter 9999 for $99.99.

- <u>Full screen after starting application</u>

After you login Proxis Restaurant, the application will occupy the whole screen until you exit Proxis Restaurant.

- <u>Default Ticket Lookup</u>

There are two views available for ticket lookup: Table Map and Ticket List. Table Map will display the open Eat-in tickets over a table layout. Ticket List will list all open tickets for Pick-up, Delivery and Eat-in tickets.

- <u>Authorizations and Ticket Access</u>

Authorize Item Removal

Cancel Sale Receipt Required

Passwords required for new ticket: when checked, every time a ticket is created, the system will pomp for the login/password.

Passwords required for Finishing Transaction: when checked, every time an opened ticket is closed, the system will pomp for the login/password.

Manager Authorization required for discounts: when checked, any on-the-fly discount requires manager to authorize. However, predefined discounts do not need manager authorization.

Display Tickets for all login Sales: Pick-up and Delivery tickets have order list on the right side which can be default to display only orders created by the current login sales/server or all sales/server.

- <u>Show Shift Selector After Login</u>

Select this box to enable the shift login and logout.

- <u>Tax Account</u>

Options to charge tax on price before or after discount.

- <u>Automaticlly close ticket after full payment</u>

Without selecting this option, you have to click "Close" button on the screen to close the ticket

after the full payment is received. Selecting this option will automatically close the ticket if the ticket is paid in full.

- Calculate Tax Amount in the ticket

    Specially for fast service restaurants, some states does not require tax for the pick-up order. Please consult with your accountant and then finish this setting based on your state regulations.

Setting Up Receipt, Order and Report Printing:

The options on this setting screen allow you to set up all the printing related preferences. This setting screen is divided into 3 groups. Top group is where to setup the receipt printing and cash drawer; The middle group is where to setup the order post printer(Usually Kitchen printers); The bottom group is where to setup a separate report printer other than the receipt printer.
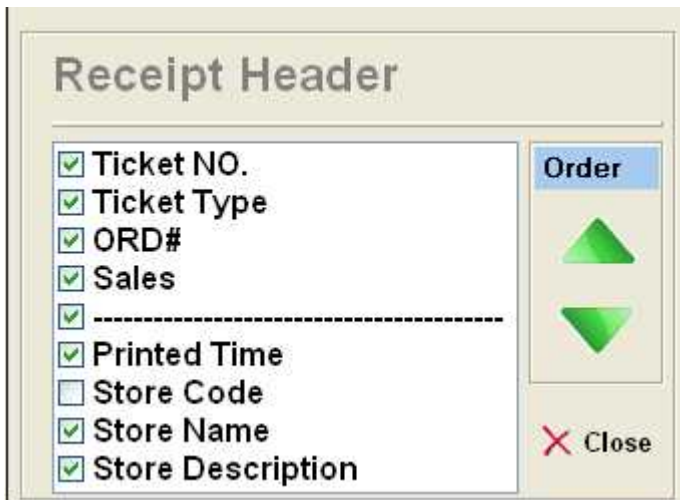

Receipt Printing

- Use Receipt Printer

    Check this box will print receipt automatically each time a payment is processed.

- Font Control

Choose this option will let you preview the receipt before you actually print it.

- Header Setting

Select the format and information you want to be printed on the receipt.

- Receipt Printer and Cash Drawer Driver Setting

Proxis Restaurant prints receipts using either the "Command" method that requires the printers windows driver being installed or "OPOS" method that requires the printers OPOS driver being installed. There are advantage and disadvantage of either method, please consult your POS vendor or technician to select the best method for your restaurant. In general Command method prints faster and OPOS method has better control over formatting and cash drawer.

- Extra Copy For Customer Signiture

Print an extra copy for customer signature on all credit card payments.

- Print Customer Address On Receipt

Choose this option to print the address on Receipt and Kitchen Order.

Post Order Printers Setting

In R-Office and R-Corp application, you can set up different printers alias for different purposes. Such as Kitchen Printer, Main Printer, Reception Printer and so on. Here we let you to connect a local or network printer to this alias so Proxis Restaurant knows on which printer it can send the print job to.

Report Printers Setting

The balance reports can be printed from either the receipt printer or a dedicated report printer you select here.

Setting Up Payment Processor

To use the integrated credit and debit card processing methods, first of all, you need to set up the credit card processing methods in the Store Settings as shown below. Uniforce R-System has two payment processors that are directly integrated into the software: PPI and X-Charge. PPI payment gateway are completely integrated with Uniforce R-System, no additional software

needs to be installed; X-Charge, however, requires you to install the X-Charge server which is free of charge to all Uniforce R-System customers. Besides these two free of charge payment processors, the merchant can also choose PC Charge which requires you purchase a PC Charge Lic. and install the PC Charge server. You can call Uniforce support to get detail information on the PC Charge integration.

Setting Up Working Day

Here you can set up the starting and ending time of your business day. In the above example, the business working day starts from 9:30AM and ends at 2:30AM the following day. For example, any sales between 9:30 AM Monday and 2:30 AM Tuesday will be counted as the Monday's total sales.

Setting Up Menu Item

Add new menus from the bottom part of the window such as Lunch and Dinner, and specify the starting and ending time for each menu.
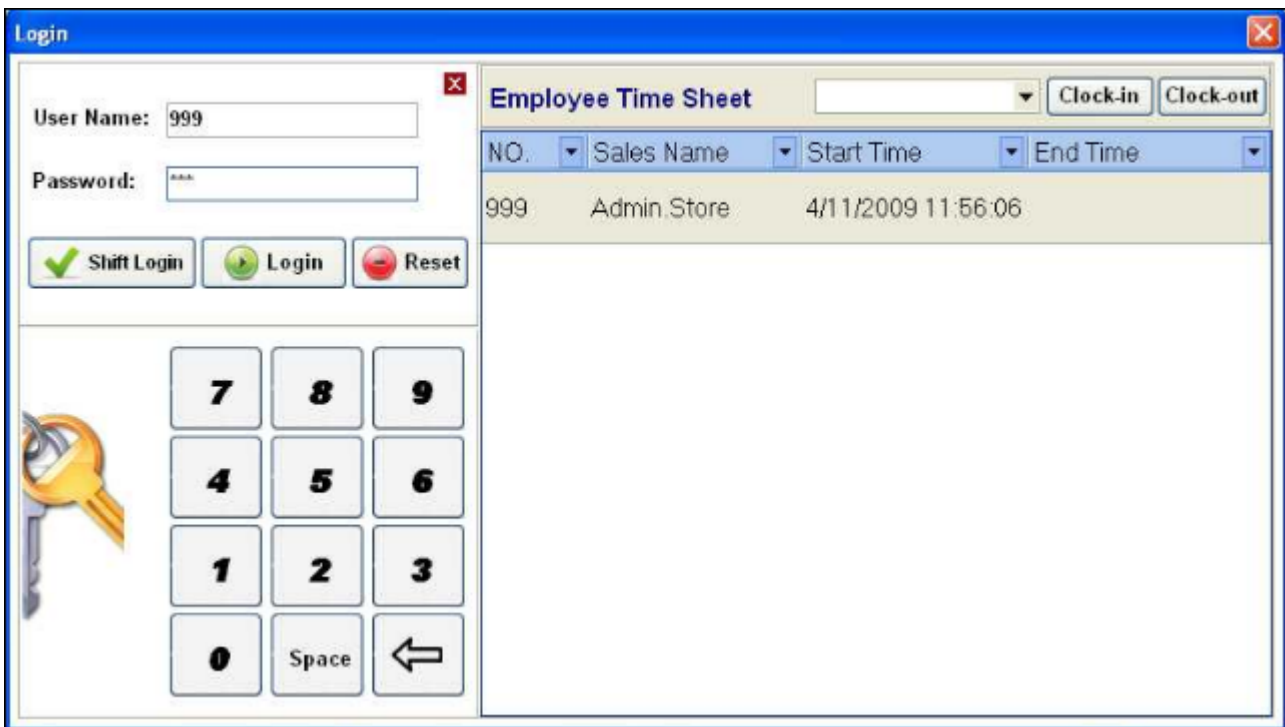
Select menu name for each menu item from the item list at the top.

To set the menu item display language, choose it from the drop down list of Item Name Language.

Setting Up Other Devices:

- Use Pole Display

  This option lets you choose the port number that your pole display is connected to.

- Use Cash Drawer

  Check the box to use the cash drawer that is connected. Check the box next to the payment type to open the drawer when payment is made in this payment type in the Proxis Restaurant system.

- Use POS Scale

  Connect a POS scale to Proxis Restaurant. You can use the scales OPOS driver or Config the serial port communication to get the weight from the scale.

Login and Timesheet

As soon as the Proxis Restaurant is launched, you will see the login screen on the left and the timesheet on the right.

Log in

There are two types of logins, Shift Login and Login. You have to enable the shift login in the settings to use that function. When choose Shift Login, the user will be asked to count the bills and coins in the cash drawer to log the starting cash amount and when exit the POS, the user will be asked to count the bills and coins to report the ending cash amount as well. Regular login will bypass this window.

To login, first type in the username, then type in the password. You can either use the keypad below the login box on double click the input box to bring up a pop-up onscreen keyboard:

Employee Timesheet

To clock in, select an employee who has not clock in yet from the drop down and then type in the password. After clock in, the employee's name will be listed below with the clock in time, shows as Start Time. To clock out, highlight the employee in the list, click clock out and then type in the password, after clock out, you will see the clock out time, End Time, in the list.

Employee Time Sheet	Admin.Store ▼	Clock-in	
NO. ▼	Sales Name ▼	Start Time ▼	End Time ▼
102	Smith.Joe	12/16/2008 12:55:0!	
999	Admin.Store	12/16/2008 12:55:2:	12/16/2008 2:43:19 P

Tickets/Transactions

Different Types Of Tickets

In Proxis Restaurant, there are three types of tickets: Pick-up ticket, Delivery Ticket, and Eat-in Ticket. As their names indicate, each type is for a specific type of transactions in a full service restaurant. In R-Office and R-Corp, you can activate or deactivate certain types of the tickets. For detail instructions on how to use each ticket, please go to the How-to section in this user guide.

Ticket/Order View Window

Click [icon] in the top menu to open the Ticket View window. This window displays all types of tickets currently in the system. You will notice that the items on this view are in three different colors: yellow indicates an active ticket that has not been paid yet; blue indicates an active order that is partially paid; and green indicates an active order that is paid in full. Closed tickets will not be displayed in this window.

For Eat-in tickets you will also see number of people sitting on that table. Also, click on the "Table Map" button will display the full table layouts:

	Table 2	Table 3	Table 4

Table 1 200300020120 4 $6.64	Table 9	Table 10	Table 5
	Table 11	Table 12	Table 6
		Table 8	Table 7

✕ Close   **Back**
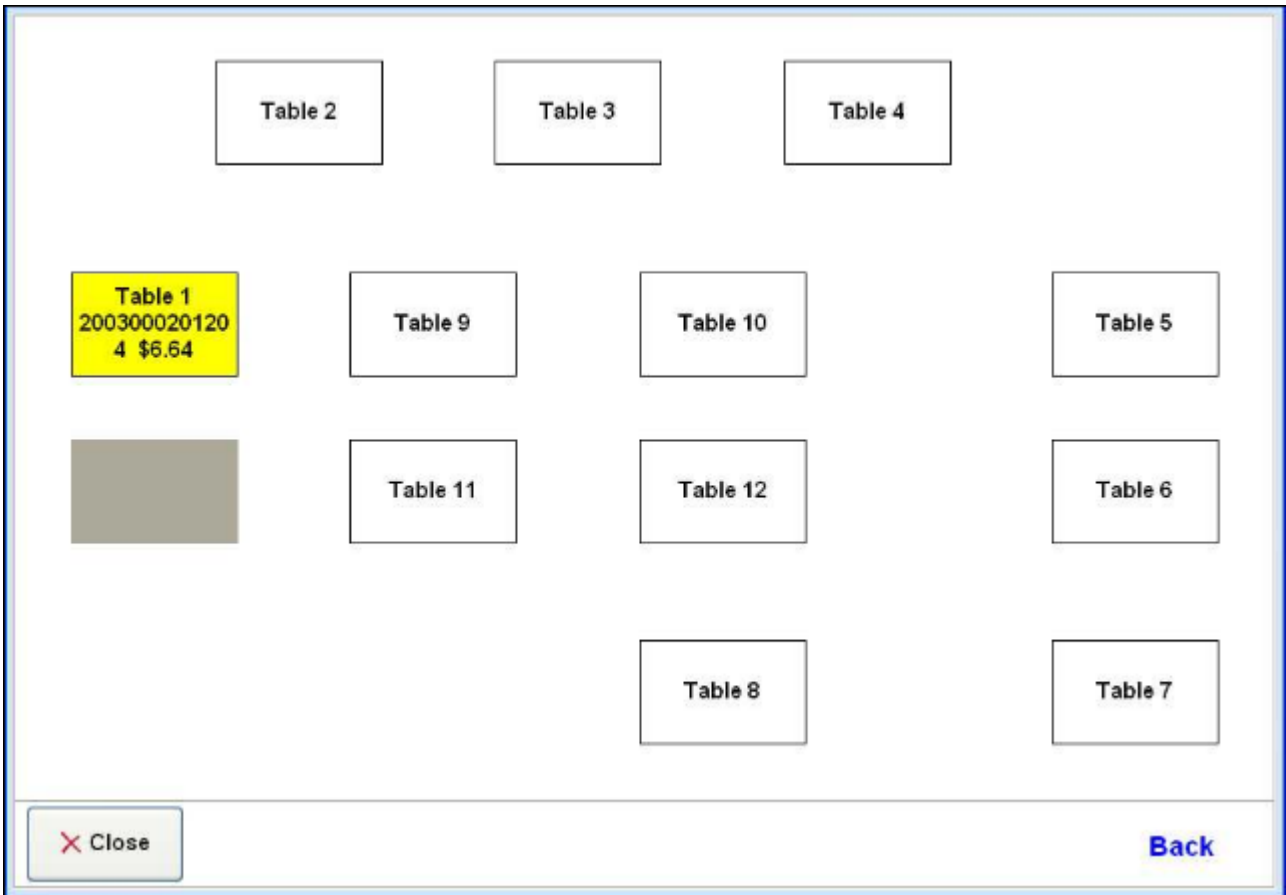
For detail instructions on how to work on all 3 types of tickets, please go to the section How To Work With Tickets.

Query Tickets

Click on the top main menu to open the query screen.

Query By Ticket Number

To query a ticket by ticket No. Simply type in any digits of any part of the ticket number and click on "Force Search". For example, type in "01" and click "Force Search" will return all the tickets that contain "01" in its ticket number.

Query By Other Fields

Also, you can type in or select the search criteria and click "Query" to display all the matching results.

Here is the sample result for the the following search criteria: Date From: 11/18/2008 To: 11/19/2008 and Total >= $20.00:

Ticket NO.	Time	Customer	Sales	Type	State	Total	Paid
1174906303	11/18/2008 10	Anonymous Custome		togo	closed	$4.32	$4.32
1138614839	11/18/2008 10	Anonymous Custome		togo	closed	$5.40	$5.40
1185459124	11/18/2008 10	Anonymous Custome		togo	closed	$4.32	$4.32
116134312	11/18/2008 6:(	Anonymous Custome		togo	closed	$10.80	$10.80
1195394206	11/18/2008 6:(	Anonymous Custome		togo	closed	$11.90	$11.90
1143074262	11/18/2008 6:(	Anonymous Custome		togo	closed	$10.80	$10.80
1183389453	11/18/2008 6:(	Anonymous Custome		togo	closed	$9.72	$9.72
2147158061	11/18/2008 10	Anonymous Custome		table	created	$0.00	$0.00
2178714785	11/19/2008 2::	Anonymous Custome		table	paidall	$31.35	$31.35
2192560150	11/19/2008 2:4	Anonymous Custome		table	held	$25.94	$0.00

Customers

Customer Browser

Click ![Add Custo] in the top main menu to open the customer browser screen.

Here you can type in part of the customer name or id to lookup that customer, click on "New" and "Edit" button at the bottom of the screen to add a new customer and update a current customer.

Customer Search and Quick lookup

On each type of tickets, you can click ![Customer Anonymous Customer] button to open the customer search screen:

Here you can type in part of the phone number or name, when you are typing, the system will automaticlly filter the customer list until you find the customer.

Daily Reports

Click [icon] in the top main menu to open the daily report screen. Only users with Admin or Manager rights have access to these reports.
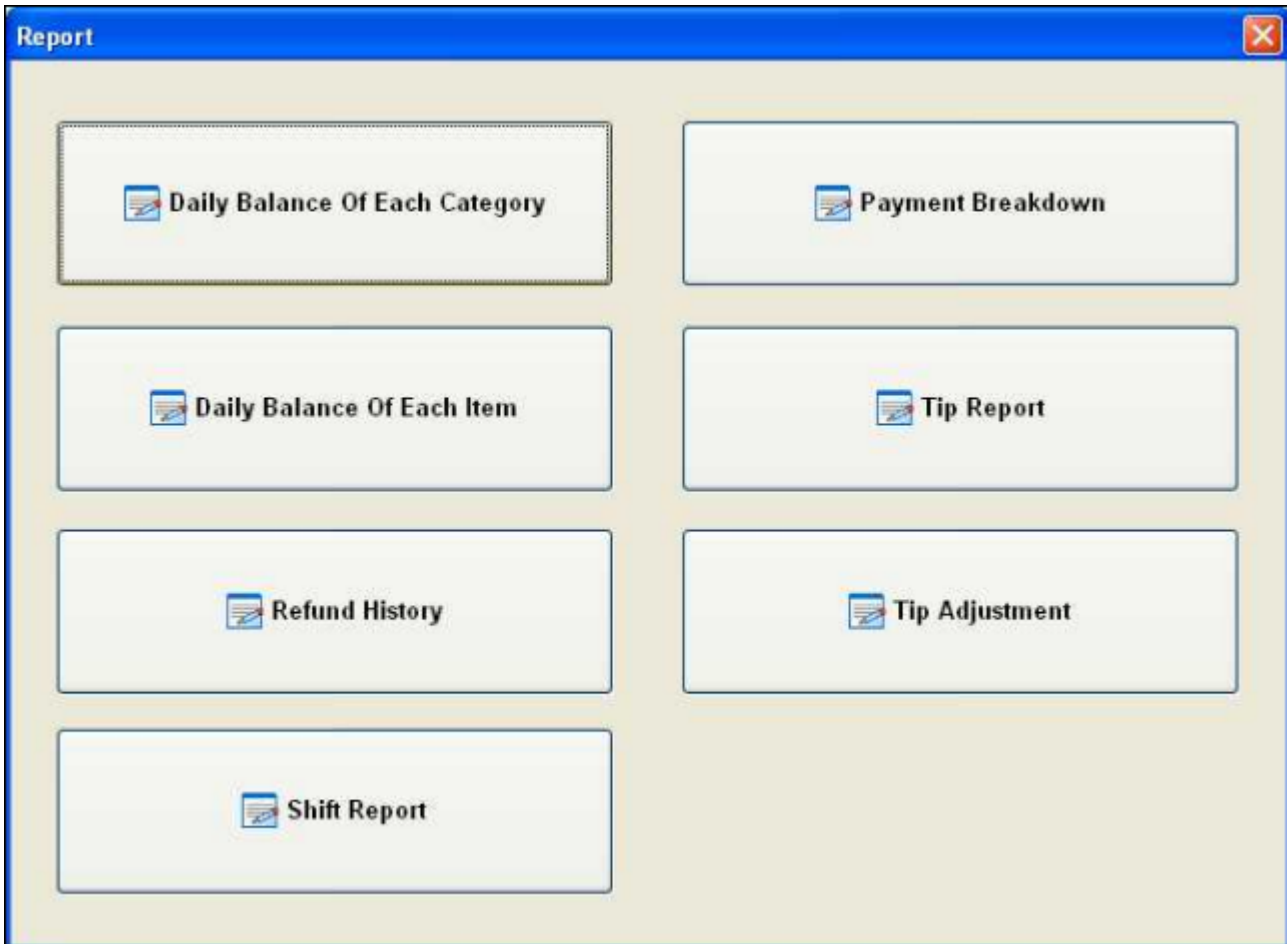
Daily Balance Of Each Category

Here you can put in the starting date (1/16/2008) and ending date (1/16/2008) to see the summary sales of each menu category.

Daily Balance Of Each Item

This is a similar report as above but list sales by each menu item instead of each category.

Refund History

Refund History reports the list of refunds and the notes attached to each refund.

Payment Breakdown

Payment Breakdown reports the payment received breaking down into all payment methods.

Tip Report

This report list the tips for each sales/waitress in a select period.

Tip Adjustment

This is the report used to perform tip adjustment at the end of day.

Shift Report

The shift report show the shift number, date, starting and ending time, station id, starting and ending cash amount, projected ending cash balance, all received payment amounts and the cash drawer status. The above example shows the cash drawer is not balanced (Drawer Balanced: N), the starting cash amount is $16.35, ending cash amount is $20.07, however the projected ending cash amount is $30.44.

There are two function buttons at the bottom of the report screen: Check-out, which is used by the manager to force check-out a shift; and Receipt, which prints the shift report from the receipt printer.

Order Summary Screen

Click on in the top main menu to open the ticket/order summary screen:

This window displays all types of tickets currently in the system.

Click on   will scroll up and down in that ticket list. Click on Table Map will bring up a table layout window.

How To Read The Displayed Message

Color of the Ticket Icon:

You will notice that the items on this view are in three different colors: yellow indicates an active ticket that has not been paid yet; blue indicates an active order that is partially paid; and green indicates an active order that is paid in full. Closed tickets will not be displayed in this window.

Information for Delivery and Pick-up ticket:

- Ticket Number
- Ticket Amount
- Customer Name

Information for Eat-in ticket:

- Table Number
- Ticket Number
- Number of Customers sitting on that table
- Ticket Amount

Pick Up Ticket

Click in the top main manu to open the Pick Up Ticket screen.

Function Layout of a Ticket Screen

On the Right:

Order List

The Pick-Up Order List screen displays the list of all pick-up tickets with summary information for each ticket such as the server, order id and total amount. They are also color coded: green indicates the ticket is paid in full, yellow idicates no payment has been received yet and light blue indicates there is still remaining balance on that ticket.

In the middle

<u>Menu</u>

The menu occupies the complete right side of the ticket screen, on top you can select the category, at the bottom, you can click << or >> to move the menu items or "Click to select category" to load items in a category to the current screen:

Ticket List

Ticket List is located at the far right of the screen, it is also color coded. Please click here to find out what each color tells you.

On the Left:

Item List Area

To add an item to the item list, simply click the menu item at right. Another way to add an item is to scan the item barcode.

	Ma	Menu Name	Price	Quantity	Amount
☐	Y	Pad Thai	$25.00	1	$25.00
☐	Y	french fries	$1.19	1	$1.30

Pick-Up

Large — $0.00
Modifier

Barcode : _____

Select Cust   Sales   Total CRV: $0.00

Anonymous Cus   Store   Total Tax : $0.11

SubTotal : $26.19   Tip: $0.00

Total : **$26.30** Paid: $0.00   DUE: **$26.30**

When an item's being added to the list, you may see a pop-up window if the item:

- Does not have a price, the pop-up window asks you to input a unit price.
- Has to be weighted since it is sell by weight, the pop-up will ask you to get weight from the POS scale or input a weight:

Each record in the list shows the name, price, quantity, and the total amount of this item. It also indicates if this item comes from main menu or from a side order menu. At the bottom of the item list, you can find the modifier list on the left and item list function buttons on the right. The modifier list will display all the modifiers for the current selected item. The item functions buttons, from left to right are, move current item up, move current item down, refrest the item list, undo the unsaved changes, remove item from the list.

Item Modifier Function Area

There are six function buttons in this area: Note/Modifier; Order/Modifier; Promotion ; Discount; Side Order ; Item Detail.

Modifiers, Promotions and Side Order can all be defined in the R-Office or Corp-Office application. Note can be added anytime as long as the ticket remains open. Please refer to the specific topics: Modifiers/Notes; Side Orders; Promotions for detail.

While the Note/Modifiers is used to modify a single item, Order/Modifier is used to modify the current whole order with Pick Up dates and Special Instructions, also using Oder/Modifier a deposit can be applied to the current order while the remaining balance can be charged when the oder is picked up or delivered later. Please refer to the specific topic: Order/Modifier for detail instructions.

While Promotion is used to apply predefined discounts based on the preset conditions set in the R-Corp, Discount is used to apply discounts on-the-fly. Another major difference between Promotion and Discount is that Promotion is not subject to the limits of the server on the ticket, but discount can not exceed the discount limit set in R-corp or R-Office for the server on the current ticket.

Ticket Summary Area

Right below the item list, you can find the summary area. For Pick-up tickets, you can find Customer and Sales selection button, for Delivery Ticket, you can select Delivery Driver, and for Eat-in Ticket, you can add number of customers on the table and select talbe number for the ticket. Other information displayed in these area are Sub Toal, Tax, Tip, Total, Paid Amount and Due Amount and so on.

At the bottom:

<u>Ticket Action Buttons</u>

Buttons on the left side are the payment buttons. On the right, you can find functions buttons that Print Receipt, Post Order, Save/Hold, Close or Create new ticket. The detail of these functions can be found at the links below:

Payments

Ticket Function Buttons

Delivery Ticket

Click in the top main manu to open the Pick Up Ticket screen.

Function Layout of a Ticket Screen

On the Right:

Menu

The menu occupies the complete right side of the ticket screen, on top you can select the category, at the bottom, you can click << or >> to move the menu items or "Click to select category" to load items in a category to the current screen:

Ticket List

Ticket List is located at the far right of the screen, it is also color coded. Please click here to find out

what each color tells you.

On the Left:

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[Ticket Function Buttons](#)

Eat-in Ticket

Click in the top main manu to open the Eat-inTicket screen.

Function Layout of a Ticket Screen

On the Right:

Menu

The menu occupies the complete right side of the ticket screen, on top you can select the category, at the bottom, you can click << or >> to move the menu items or "Click to select category" to load items in a category to the current screen:

Table List

Table List is located at the far right of the screen, it is also color coded, red indicates the table is occupied and once it is occupied, it also shows how many of the customers sitting on the table:

The above example shows 4 customers sitting on table 1 and 1 sitting on table 2.

On the Left:

<u>**Item List Area**</u>

To add an item to the item list, simply click the menu item at right. Another way to add an item is to scan the item barcode.

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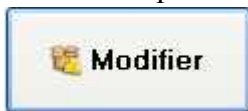
Modifiers/Notes

Set up Modifiers

Modifiers can be defined in the R-Office and/or R-Corp applications. Notes are added at run time and do not need to be pre-difined.

Add Modifiers and Notes to the ticket

Modifiers and Notes can be added to each item. Modifiers are actually predefined notes. Adding Modifiers is initialized by the system automaticlly for those items with the predifined modifiers. In the following example, Menu Item Plain S (3) has two prefefined modifier groups: Cooking Level and Extras. When this item is added to the ticket, the Modifiers Window will pop up in modifier view automaticlly with the two modifier groups already loaded, the operator can then select modifiers from each group before closing this window and return to the ticket.:
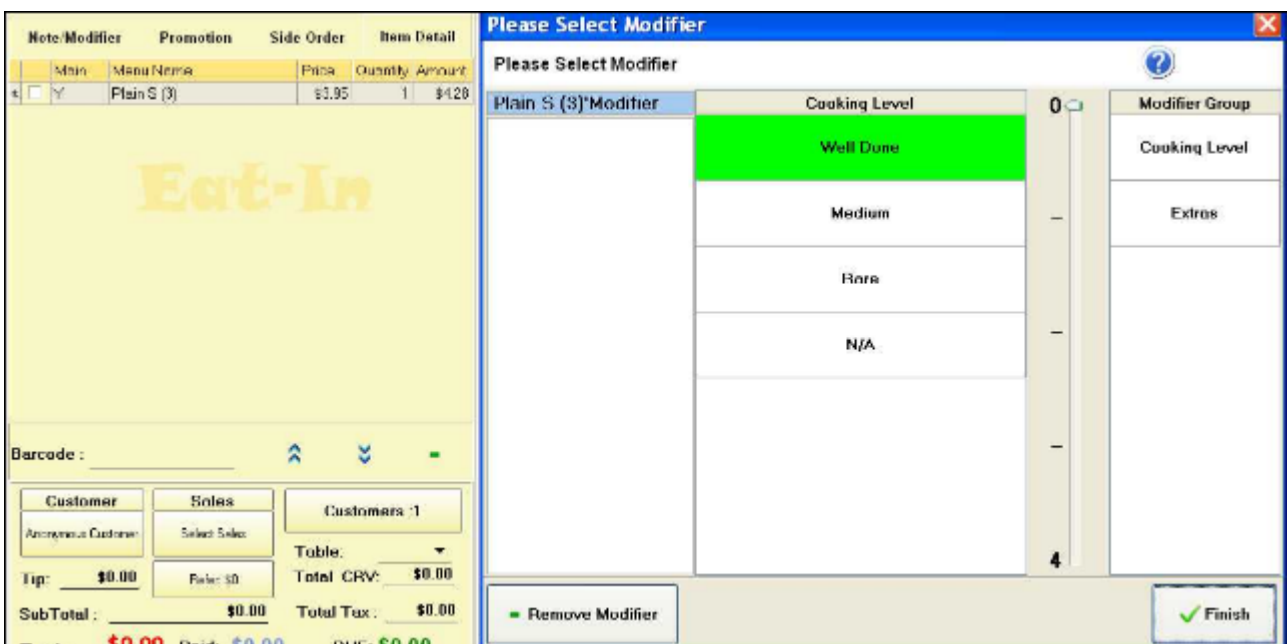
To change the modifiers or add new modifiers or notes, simply click the **Note/Modifier** button on top of the ticket and the mofifiers/note window will open in the note view and you can add/change/delete modifiers or notes. You can open the Modifier view from the Note view by clicking the button on the top right corner: **Modifier**

When posting order, the modifiers and notes will be listed under the item:

1 x Plain S (3)
 *Well Done
 * Extra Cream
 * Add a new note

Order/Modifier

Add Order Modifier

Order modifier is used to schedule pick up date and time and charge deposit for a pick up ticket. First, select a scheduled pick up date and time, then set the warning days and add special instructions. Warning days is for the system to remind the server in advance of the pick up dates. If deposit is required, enter the deposit amount before click the payment methods to process the payment.

Look up tickets with order modifier

First, go to ticket query, you will see the warning button at the bottom of the screen

blinking if there are any orders modified with warning days meet the criteria. Click on it will list all those tickets on screen

.

Click on a ticket to look at the detail of the ticket and then Reopen it to send the ticket to the Pick-up order screen where you can complete the order with the remaining payment when the customer picks up the order:
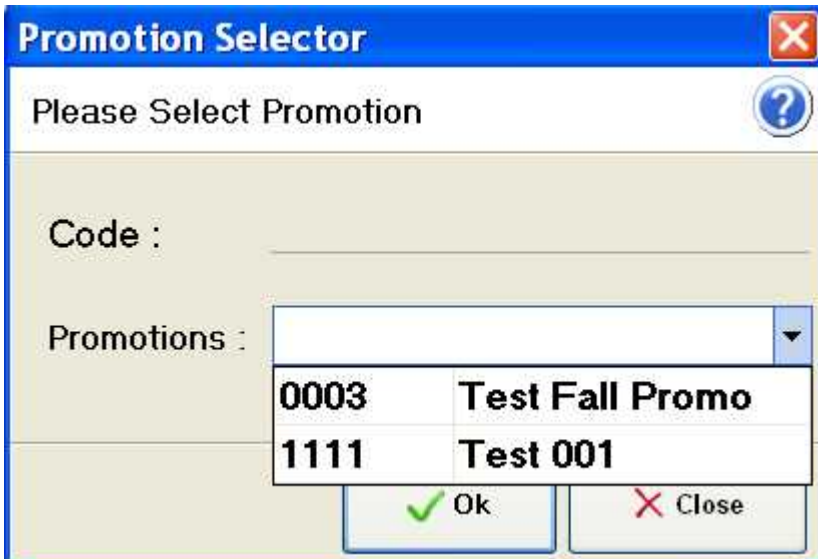
Promotion

Same as modifiers and side orders, Promotions are also created in the R-Office and/or R-Corp applications.

To use a promotion, select the items that you want to apply promotion to by check the check boxes:

Then click the Promotion button on top of the ticket:

Here, you can either scan the promotion code or select an active promotion from the drop down list. Then click "Ok" to apply the promotion.

Side Orders

Side Orders are also created in the R-Office and/or R-Corp applications for each item.

Add Side Orders to a menu item

Click on the **Side Order** button on top of the ticket to open the Side Order menu:
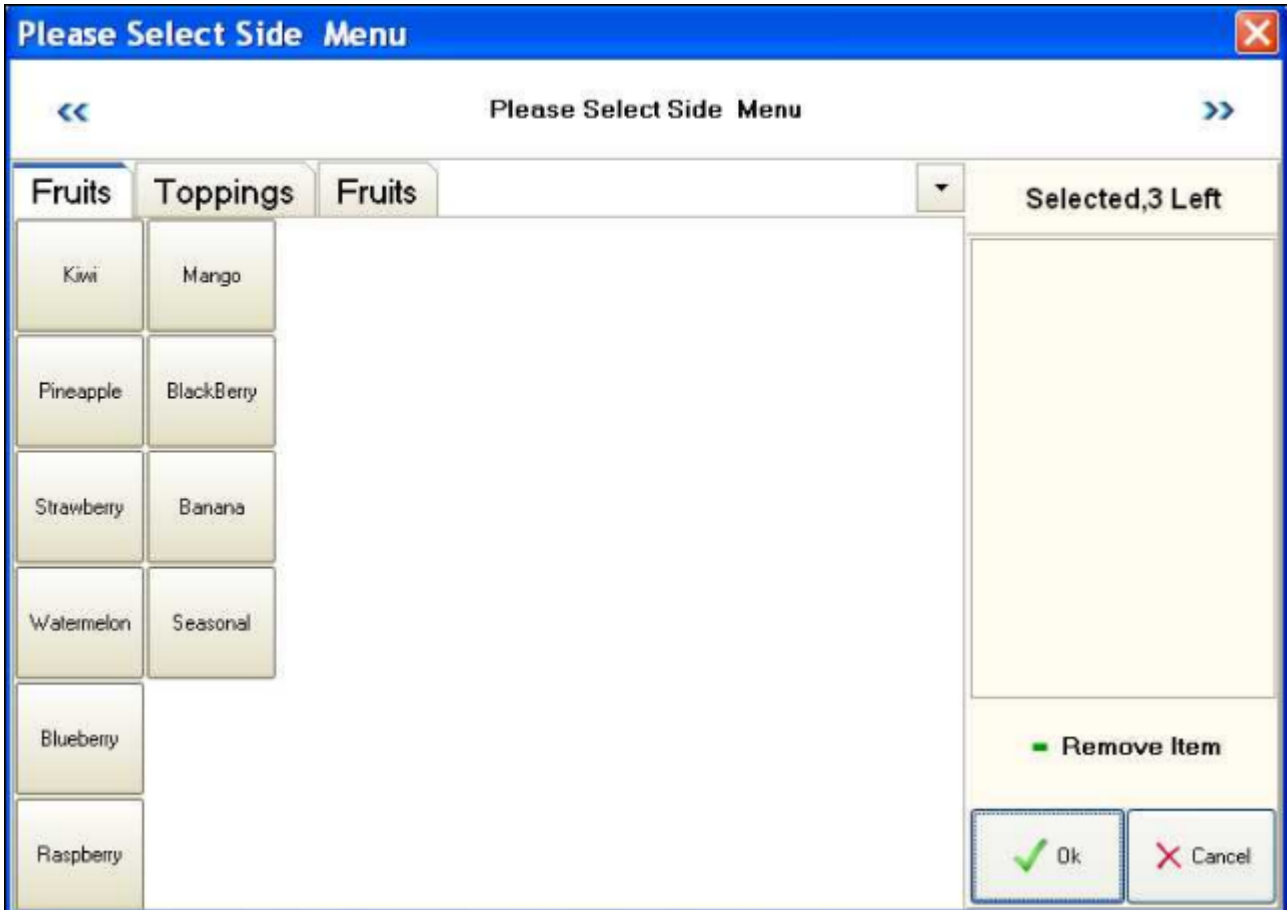
Adding the side orders by clicking on the side menu items, close the menu by clicking the "Ok" button.

Side orders will be displayed under the main item when posting the order:

1 x Green Tea M (3)
    Mango
   Coconut Flakes
    BlackBerry

Menus

Menu Category and Menu Item

Menu category and item can be created in R-Office and/or R-Corp. In Proxis Restaurant, however, you can select menu categories to display and select the display positions for each menu item.

Menu Setting in Proxis Restaurant

In the Settings, Base Setting, you can select menu button size, font, font color, photo display option and so on:
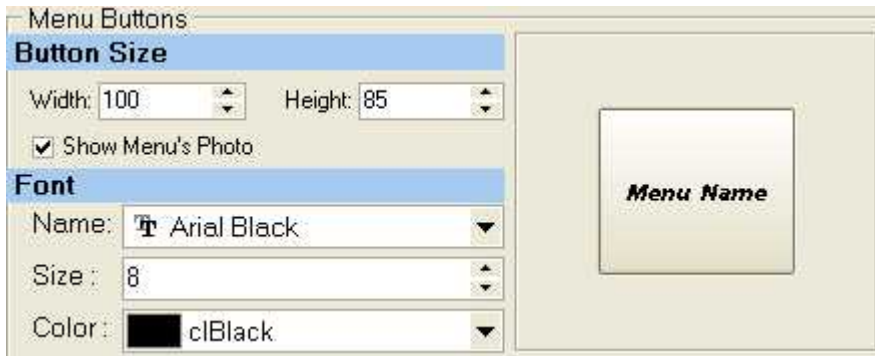
In Menu Item Setting, you can choose categories to be loaded for menus during a day:
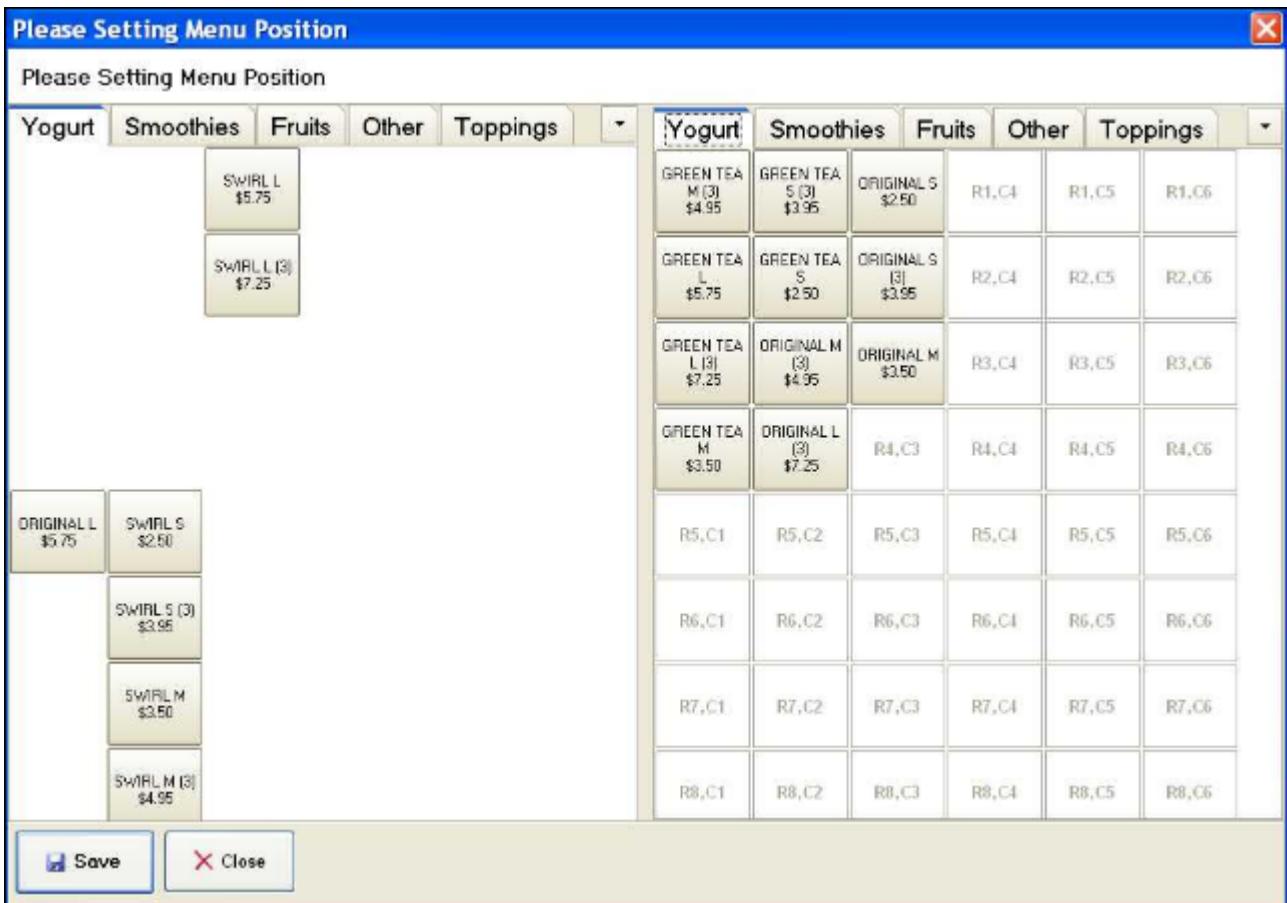
Use Menu

Load menu: On each type of ticket, the menu will be loaded into the right side of the screen. Click

Load Menu

to load the menu into the screen.

Re-position menu items: to reposition the menu items, click **Position** :

In the window above, simply choose the items from the left and put them into the positions on the right. For example, I am going to put everything left in the left window to Row #4 Column 3 and Row # 5 on the menu, after you save the setting, here is the new look of the menu:

Select Current Category: this can be done by click "Select Category" button and then choose a category for display:
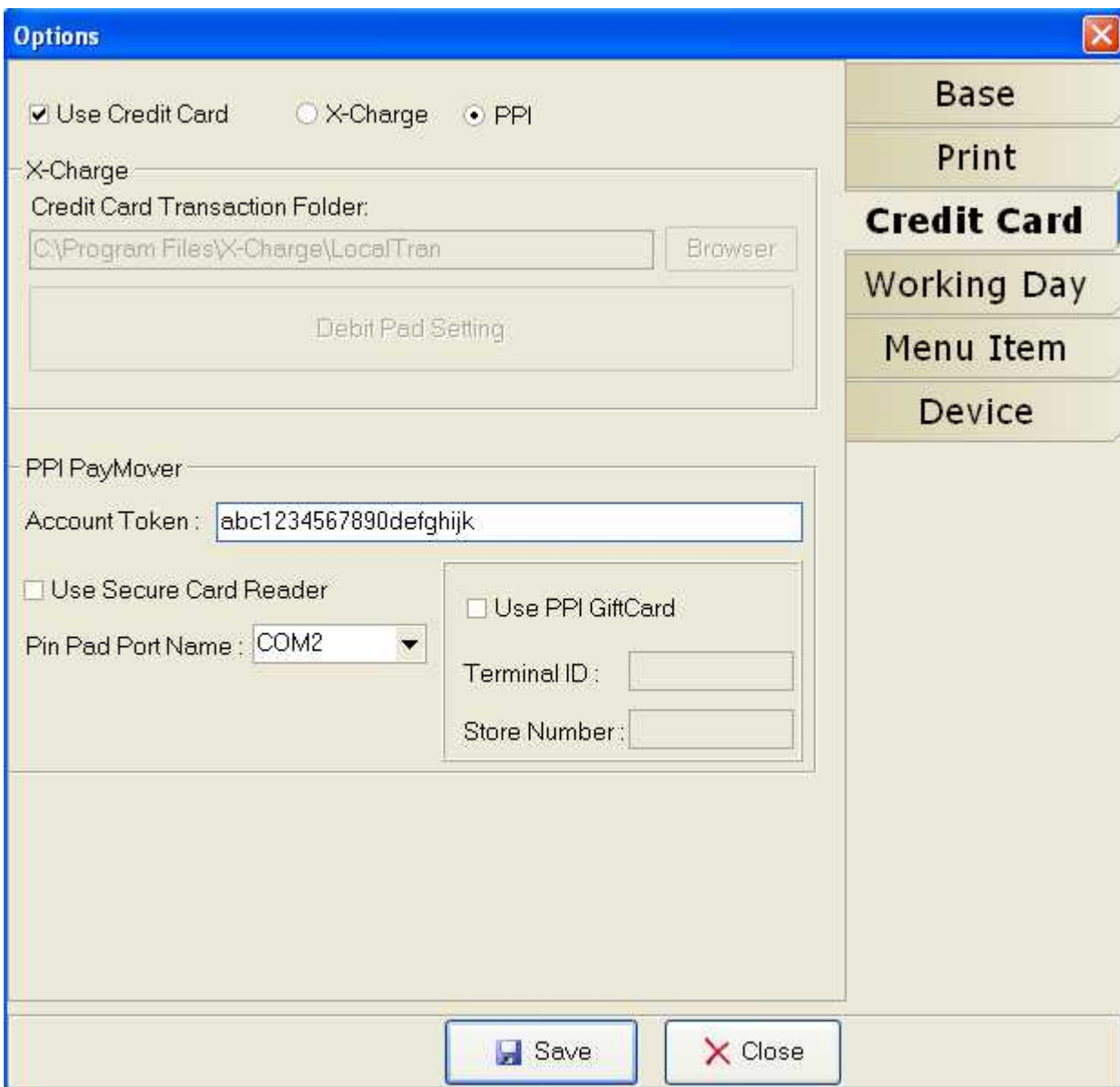
Process Payment

Payment function buttons are displayed at the bottom of the ticket:

Credit Card and Debit Card

To use the integrated credit and debit card processing methods, first of all, you need to set up the credit card processing methods in the Store Settings as shown below.

To process a payment using credit card or debit card, click either Credit Card or Debit Card button, you will see a pop up window for you to swipe the card:

Cash

For cash payment, click on the Cash button, you will see a pop up window as shown below for you to enter the received amount:

Click on "SHOW CHANGE" will display the change amount:

Click on "ENTER/OPEN DRAW" will open the cash draw and finish the transaction.

If you make a mistake, click 'CLEAR" or click "Back To Ticket" button to correct the mistake.

When the transaction is finished, the system will create a new ticket and the change amount for the last transaction will be displayed again in case you forget:

A receipt will also be printed at this time.

Multiple Payments

Multiple Payments is used to either process a payment using multiple payment methods or divide the payment among customers. For each payment, you can just type in the amount in "Pay:" or select the items for this payment.

Multiple Payments

Multiple Payments

Payment List ▾
CASH: $ 6.50
CASH: $ 6.50

Pay: 0   Select Items

Ticket : Delivery , 0166825712

Total : $19.50

Paid : $13.00

DUE : $6.50

7	8	9
4	5	6
1	2	3
0	.	Clear

Receipt   CHECK   CREDIT CARD   DEBIT CARD   CASH   ✓ Finish   ✗ Close

Ticket Functions

Function buttons are located at the bottom right of the tickets.

Save/Hold

Use this function to hold a ticker without any other actions such as post order or process payments. Also use this function to save a modification on an open ticket.

Post Order

Use this function to post the ticket order to the parties who need to know about the new ticket or the modification on an old ticket. For example, when order is posted, the kitechen printer will print the order on the kitchen printer. Post Order will automaticlly save the ticket.

Receipt

Use this function to reprint the receipt. The receipt will be printed automaticlly when the payment is processed. Use this function only when you want to reprint a receipt.

New

Click this function button will create a new ticket. A new ticket will be automaticlly created as soon as you finish the payment for an old ticket. Use this function only if you are on an old ticket and want to create a new one.

Close

Use this function button to close an old ticket. However, to close a ticket, the ticket has to be paid in all. Closed ticket will be removed from the ticket list on the right side of each type of ticket window and the order view window.

You can also set the system to close the ticket automaticlly as soon as the ticket is paid in full by going to the setting--> base and choose the option:

Automaticlly close ticket after full payment

Split Order

To split order, the server needs to select the items to be added to the sub orders:
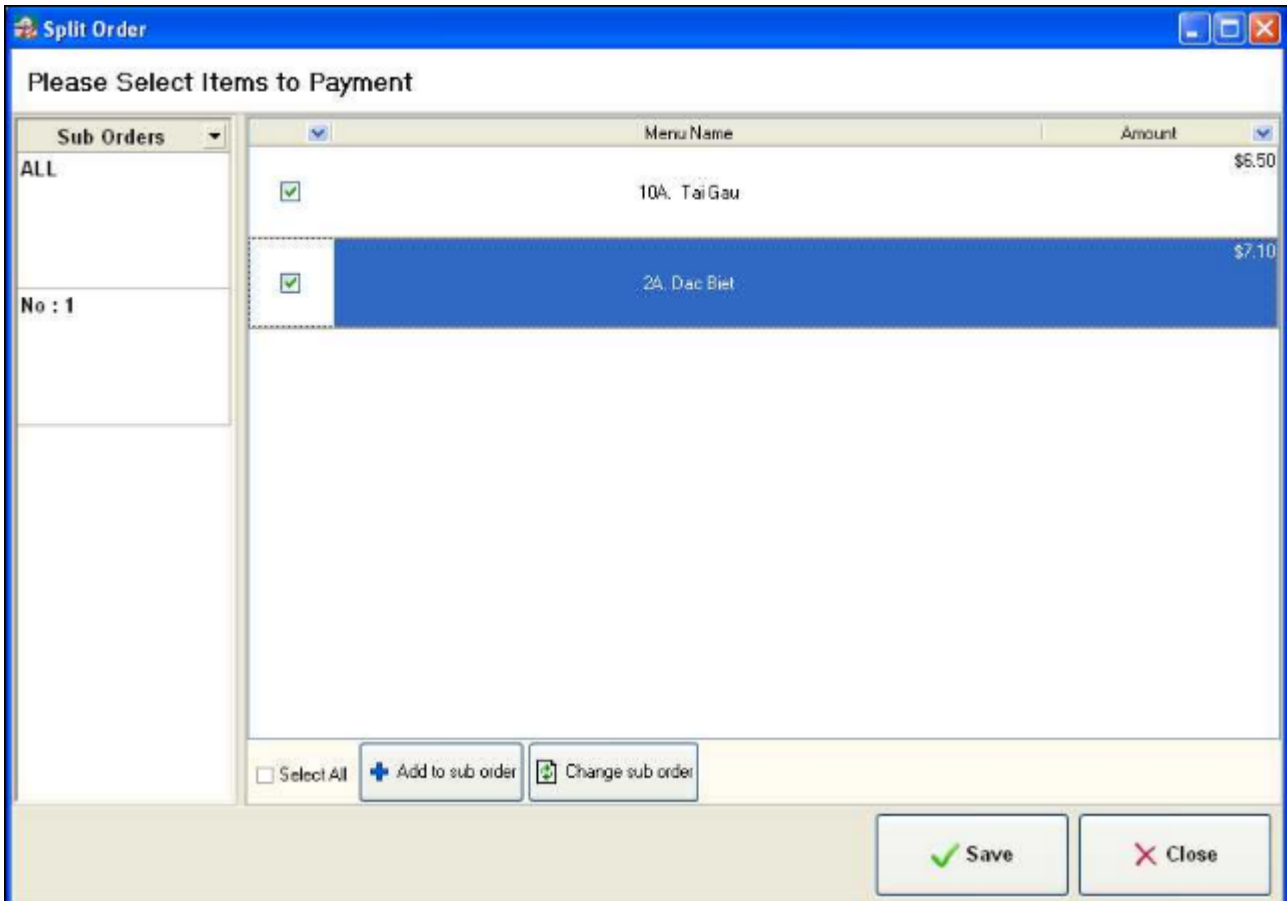
Split Order works differently on Pick Up/Delivery Ticket or on Eat-in Ticket. After you split either a pick up or delivery ticket, the original ticket will be replaced with the new ones in the ticket/order list panel:

The original order #4:   After split it into 2 orders #4 and #5:

.

When split an eat-in ticket, since splited orders still share the same table, when you click on the table, a pop up window will ask the server to choose the sub order to work with, select to sub order will place it in the ticket window:

Select a ticket for Table

Select a ticket for Table

Ticket Info ▼

Ticket No   :2147413537 (held)
Sub Total   :$13
Tip   :$0   CRV:$0   Tax:$1.2
Total   :$14.2
Customer   :Anonymous Customer

Ticket No   :2146290257 (held)
Sub Total   :$17.85
Tip   :$0   CRV:$0   Tax:$1.65
Total   :$19.5
Customer   :Anonymous Customer

✕ Close

Table 1-1 Store (Split Order)

Table 2

Table 3

Table 4

Table 5

Table 6

Table 7

Void, Cancel and Refund

What's the difference and when to use

Here is the general guidline to use these functions:

To void a ticket if there is no payment processed on the ticket yet or the ticket is created by a mistake and the order has never been processed.

To Refund if the ticket is partially paid or totally paid, the order has been at least partially processed, or a reverse payment transaction has been involved and reasons need to be provided for the refund.

To Cancel a ticket if the ticket has not been saved yet.

Void

To void a ticket, click ticket query button on the top menu bar to open the query window. Query the ticket out, then select the ticket and click the void button at the bottom of the query window:
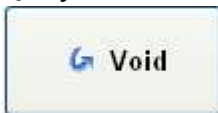
A pop up will ask you for the manager's username and code:

After the right password is entered, you will be asked again to confirm the Void action:
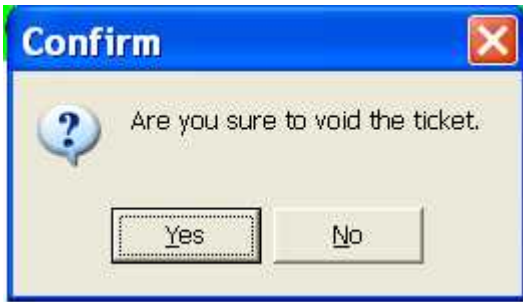
After you void a ticket, the state of the ticket will be changed to "Void" and the color of the record will be changed to grey. The second ticket in the below example is voided.

Ticket NO.	Time	Customer	Sales	Type	State	Total	Paid
100300032460	9/15/2007 3:07:51	Anonymous Customer		togo	held	$7.45	$0.00
100300032461	9/15/2007 4:55:21	Anonymous Customer		togo	void	$6.00	$0.00
100300032462	9/15/2007 5:02:29	Anonymous Customer	Smith	togo	paidall	$6.00	$6.00

Refund

To start a refund transaction, query the ticket first, choose the ticket and then click the refund buttom at the bottom or the query ticket window, you will be asked to enter a manager employee number and password to authorize the refund transaction:

After the authorization, finish the refund by filling in the fields in the form: Amount, Reason before you click a payment method to refund:

When refund to credit card or debit card, the refund total amount can not exceed the total amount of original ticket. Such restriction, however, does not apply to cash refund.

Cancel

To cancel, open a ticket and delete the items from the item list. Cancel may or may not require authorization. To require authorization before cancel, please set up in R-Office or R-Corp.

Re-Open a ticket

As soon as a ticket is closed, you can not make modifications on that ticket unless you re-open it. There are restrictions on re-opening a ticket: first, the ticket has to be closed first. Second, the ticket has to be created on the current day. Third, the ticket can only be re-opened by manager users. And last, for eat-in tickets, a closed ticket can not be re-opened if there are existing tickets open on the same table. However, you can assign an available table for the re-open ticket.

Reopen

To re-open a ticket, first, query the ticket first, select the ticket before you click on button at the bottom of the query window.

As soon as you re-open the ticket, the ticket will be accessible in the ticket window. For example, a "Pick-up" ticket will be listed in the Pick Up ticket window.

Close Ticket, View Detail and Clean up Tickets

Close Ticket and View Ticket Detail

To close a ticket, select an open ticket first from the ticket list, then click on the button at the bottom of the window to close the ticket. An open ticket has three payment states: Not Paid; Paid Partially and Paid All.
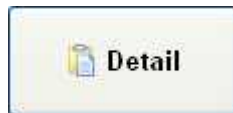
To view ticket detail, simply click button to open the ticket in a Ticket Review window:

Ticket Review

Ticket Review

NO: 100100000021

Time : 1/16/2008 7:02:32 PI

Sales :

Customer : Anonymous Custom

Total Tip: $0.00

Total CRV : $0.00

Total Tax : $3.40

Sub Total : $38.22

Total: $41.62

Paid: $31.00

Menu List

Menu Name	Price	Quantity	CRV	Tax	Amount
Ham & cheddar (H)	$4.95	1	$0.00	$0.44	$5.39
hot ham & cheddar (H)	$4.69	1	$0.00	$0.42	$5.11
hot ham & cheddar (F)	$6.59	1	$0.00	$0.59	$7.18
hot ham & cheddar (E)	$7.79	1	$0.00	$0.69	$8.48
turkey & provolone (D)	$3.50	1	$0.00	$0.31	$3.81
Ham & cheddar (H)	$4.95	1	$0.00	$0.44	$5.39
Ham & cheddar (F)	$5.75	1	$0.00	$0.51	$6.26

Payment List

Payment Method	Amount	NO.	OrderId
CASH	$15.00		
CHECK	$16.00	4587	

Refund History

Time	Amount	Method	Reason	Employee NO.
		<No data to display>		

Refund   Print Receipt   Close

Clean up Tickets
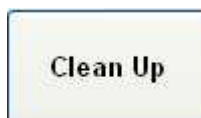
Click on button will list all the open tickets for the admin or manager user to perform actions on, such as refund, void or close ticket.