

## OPERATOR

This guide is Intended for daily use of the system

# How to Access Daily Reports

Learn how to access key reports as part of daily management operations. Dinerware is designed to begin a new business day automatically, so there is no requirement for an 'End of Day report' or 'Z report.'

Managers need quick report access to get an overview of sales for the business and for individual servers. View the report on-screen or print it using the thermal receipt printer at the workstation. For more details, please refer to the **Dinerware Cash Handling guide**.

## The daily report

**Log in** to the terminal using a four-digit PIN.

**1.** From the order entry screen, touch '**Manager**' at the top right of the screen.

The manager screen appears.



**2.** Touch '**Daily**.' A new screen appears.

Select the day or date ranges using the tool on the right of the screen.

**3.** Select a **revenue center** from the drop down menu under the date options.

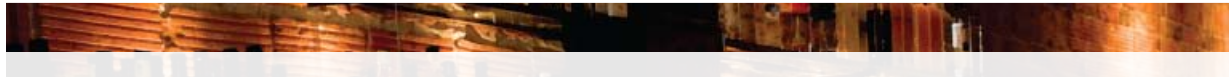


**4.** The shift report appears in to the right.

**5.** To print this report, touch '**Print**.'

**6.** To see individual employee shift reports, follow the same process, but choose an employee from the drop down list.



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# How to Create a Message of the Day

Communicate with staff easily. The Message of the Day feature enables your message to appear on the Log In screen. Use this tool to announce specials of the day or to alert staff about meetings. Managers use this efficient communications tool as a way to instantly reach those on shift.

## Message of the day

**Log in** to the terminal using a four-digit PIN.

1. From the order entry screen, touch **'Manager'** at the top right of the screen.

The manager screen appears.



2. Touch Daily

3. Touch **'Message of the Day'** in the upper right of the screen.

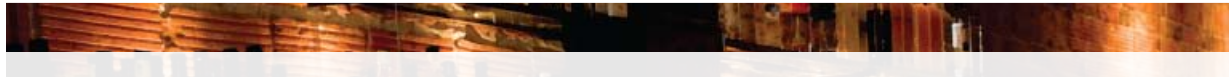


4. To alter an existing message, touch the message to select it. Touch the keyboard icon in the lower left and edit as needed.

Or, to create a new message, choose **'New'** then touch the keyboard icon in the lower left and type the message.

5. Touch **'Ok'** to save.





## OPERATOR

This guide is Intended for daily use of the system

# How to Edit Shifts

The edit shift feature allows a manager to quickly correct any clock in or clock out errors. Managers can edit specific parameters such as pay rate or job performed.

## Always "On" System

Dinerware is designed to operate in a 24/7 environment, so employees will stay clocked in unless they clock out, or a manager clocks them out. It is common for those new to the system to forget to clock out which will result in incorrect shifts. The shift edit feature makes corrections fast and easy.

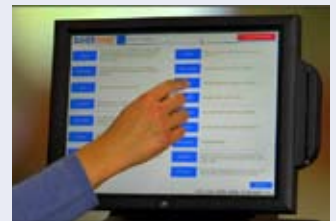
## Edit a shift

**Log in** to the terminal using a four-digit PIN.

1. From the order entry screen, touch **'Manager'** at the top right of the screen. The manager screen appears.



2. Touch **'Labor'**. A screen appears with a list of clocked in employees and all shifts that occurred in the last two days.



3. Use the **drop down menu** to see historical shifts for any date range specified.

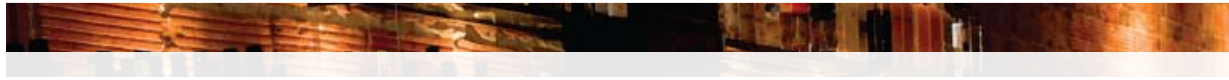
4. To modify or delete a shift, **touch the shift** to select it.

5. Touch **'Edit'** in the lower left of the screen. A new dialog box appears.

6. **Select the date** the shift began or ended, the **pay rate**, the **job** and even **tips**. Make desired changes.



7. When finished with edits, touch **'Ok'** to save. Repeat this process to delete or create a new shift.



## OPERATOR

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### Fresh Sheet

Place low-quantity or specialty items on the fresh sheet. A quantity countdown ensures staff will know when items are out.

# How to Edit the Fresh Sheet

The fresh sheet feature in Dinerware allows the ability to manage inventory of specific items in real time. It can be used in fine or casual dining for items like limited quantity appetizers, daily specials or bottles of wine. Bars and nightclubs use this feature to track merchandise like T-shirts.

What makes the fresh sheet so powerful, is its ease of use and the ability for managers to quickly make changes.

## Activate the new database

**Log in** to the terminal using a four-digit PIN.

**1.** From the order entry screen, touch **'Manager'** at the top right of the screen. The manager screen appears.



**2.** Touch **'Fresh Sheet.'**

**3.** Touch **'Edit Fresh Sheet.'**

The left column contains all menu items. The right column lists all items and their quantities that appear on the fresh sheet.



**4.** To add an item to the fresh sheet, **touch it in the left column** to select it.

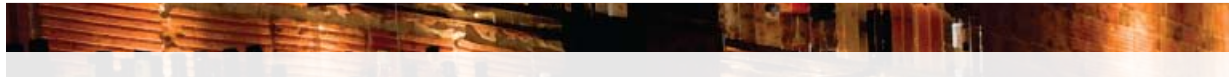
**5.** **Touch the right arrow** to move that item onto the fresh sheet.

**6.** Touch the item again and choose **'Edit.'** Enter the quantity of this item.



**7.** Touch **'Ok'** to save updates to the fresh sheet.

When this item is ordered, it will instantly deduct from the original quantity entered. When all items have been ordered, the count will read 'zero.'



## OPERATOR

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### Summary Reports

Get overviews of your business by category.

# How to Access Summary Reports

Learn how to run reports in Dinerware. The report section contains over 80 different reports.

## The reports screen

**Log in** to the terminal using a four-digit PIN.

**1.** From the order entry screen, touch **'Manager'** at the top right of the screen. The manager screen appears.



**2.** Touch **'Reports'**. The reports screen appears.

**3.** Several categories are organized in the drop down menu in the upper left of the screen. By default, sales reports appear first.



**4.** Use the **drop down list** and **highlight the report** category desired.

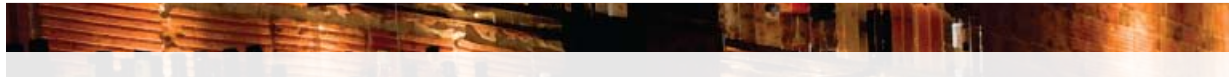


**5.** **Select the date and time** via the calendar and clock icons.

**6.** Touch **'Show Report'** on the right of the screen.

Once the report appears, a **report can be saved** in file formats such as Excel or PDF. Reports can be printed if a printer is installed in the Windows environment.





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### RFO Report

Get an overview of your business.

### Print Tip:

To print a report, a printer must be installed in the Windows environment.

# How to Run an RFO Report

Two common reports management will access are the RFO, or Restaurant Financial Overview, and the payroll report.

**Important:** Access to the reports screen is a manager privilege.

## The reports screen

**Log in** to the terminal using a four-digit PIN.

1. From the order entry screen, touch **'Manager'** at the top right of the screen.

The manager screen appears.



2. Touch **'Reports'**. The Reports screen appears.

3. From the upper left drop down menu, select Sales. By default, sales reports appear first.

4. Use the **view pane** that appears and **highlight the report** desired.



There are three different RFO reports.

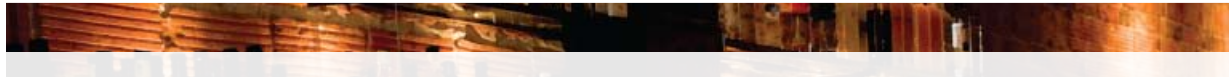
To save a report, **select 'Restaurant Financial Overview with Excel!'**

5. **Select the date and time** via the calendar and clock icons.

6. Touch **'Show Report'** on the right of the screen.

Once the report appears, **the report can be saved** in an Excel file format.





## OPERATOR

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### Payroll Reports

Dinerware provides payroll reports for employees that are paid hourly.

### Print Tip:

To print a report, a printer must be installed in the Windows environment.

# How to Run a Payroll Report

Two common reports that management will access are the RFO, or Restaurant Financial Overview, and the payroll report.

## The reports screen

**Log in** to the terminal using a four-digit PIN.

1. From the order entry screen, touch **'Manager'** at the top right of the screen.



The manager screen appears.

2. Touch **'Reports'**. The reports screen appears.

3. From the upper left drop down menu, **select Labor**. (By default, sales reports appear first.)



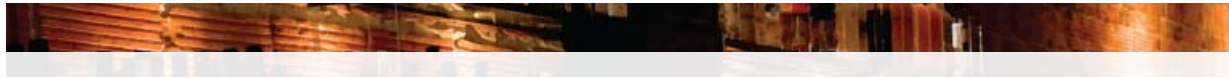
4. Use the **view pane** that appears and **highlight the report** desired.

5. **Select the date and time** via the calendar and clock icons.

6. Touch **'Show Report'** on the right of the screen.



Once the report appears, **the report can be saved** in an Excel file format.



## OPERATOR

This guide is Intended for daily use of the system

### Bar Tabs

Bar tabs is a credit card pre-authorization feature.

A pre-determined amount is applied to all credit cards. Amounts cannot be adjusted per ticket or per-tab.

This prevents the ability for a customer to use an expired or cancelled card and walk out.

### Note:

**Dinerware does not** incrementally-authorize a credit card in the event that the total of the ticket exceeds the pre-authorized amount on the card.

No warning is currently provided to the end-user that the pre-authorization amount has been exceeded.

All end-users should carefully monitor the pre-authorization amount and ticket totals to be aware of any significant disparity.

The card can be pre-authorized for a second time, but that requires the card be physically swiped again by the end-user.

**Dinerware assumes no liability for failed post authorization amounts that exceed the pre-authorization total.**

# How to Setup Bar Tabs

The activation of bar tabs enables credit card pre-authorizations for a pre-determined amount. A bar tab is created when a specific card is swiped to open a new ticket. A manager or business operator determines the uniform pre-authorization amount for all bar tabs before the start of business. The amount cannot be modified on a per-ticket or per-tab basis.


The bar tab feature is intended for use in fast-paced bar and nightclub scenarios to allow the customer to open a tab yet retain physical possession of their card.

This functionality will prevent the use of expired or cancelled card “walk outs” on open tabs.

**Important:** Use of bar tabs means the account holder will have **an authorization placed against that amount by their bank.**

## How to enable bar tabs

1. From the **Manager** screen, touch **'System.'**
2. Choose **'Credit,'** then **'Advanced.'**


Setup Credit Card System (Advanced)

Allow credit cards to be authorized ahead of time.

Use this feature if you wish to authorize a certain amount when the guest check is opened, and give the card back to the customer.

Standard authorization amount:

This feature is intended for use by bars and nightclubs.

Dinerware will conduct an initial authorization in the amount specified to ensure that the card is valid and has funds available.



Use of this feature may result in significant additional transaction costs, especially if the amount to authorize is set too low or too high.

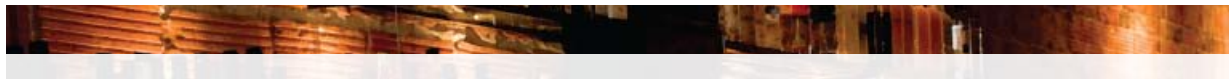
In addition, debit card holders may see cash funds withheld by their financial institution for a period determined by the institution.

This may result in negative guest feedback.

Consult with your merchant processing representative for more advice.

You may change this amount or disable the feature at any time.



## OPERATOR

This guide is Intended for daily use of the system

### Note:

This feature is intended for use by bars and nightclubs.

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Use of this feature may result in significant additional transaction costs, especially if the amount to authorize is set too low or too high.

Debit card holders may see cash funds withheld by their financial institution for a period determined by the institution.

This may result in negative guest feedback. Consult with a merchant processing representative for more advice.

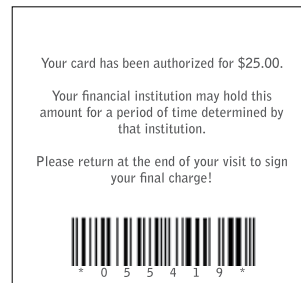
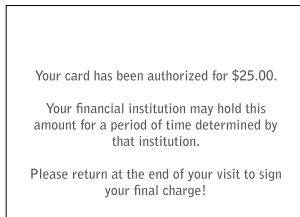
This amount can be changed or the feature can be disabled at any time.

# How to Setup Bar Tabs

3. Select the check box **'Allow credit cards to be authorized ahead of time.'**
4. Enter the desired pre-authorization amount in the 'Standard authorization amount' field.
5. Touch **'Ok'** in lower right of screen.

**Important:** The time a pre-authorization hold takes to expire varies by bank, so the credit card holder should **always consent to the opening of a 'bar tab'** and the amount prior to using their credit card — **those funds will not be available until the bank has processed pre- and post-authorizations and adjusted the account balance accordingly.** The time period varies from institution to institution but is generally measured in business days.

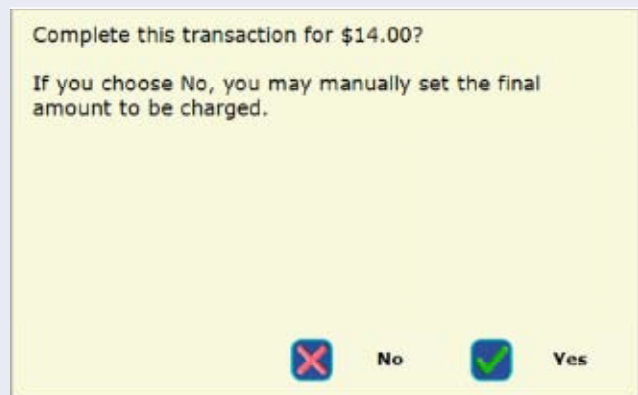
When a card is swiped, a slip will print on the receipt printer that indicates the customer's card has been pre-authorized. This slip should be handed to the customer. If barcodes are printed on customer receipts that barcode can be scanned to recall the ticket for payment.

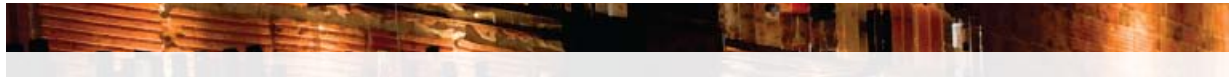


If the guest check total does not exceed pre-authorized amount, this screen will appear (right):

**'No'** allows users to enter the normal credit card transaction screen and adjust the payment total and tip.

**'Yes'** will bring up the normal payment screen. Payment for the total amount of the ticket has been collected and is awaiting a tip. The ticket should remain open until the customer has signed the credit card slip. Then the tip may be entered and the payment/ticket can be closed normally. If the customer is no longer present, any decisions regarding gratuity and the lack of a signed customer slip should be discussed with your merchant processing representative.





## OPERATOR

This guide is intended for daily use of the system

### Taxes

A **tax** is an added amount, and can be a flat number or a percentage.

Taxes, Revenue Classes and Menu Items link together in different ways.

### Tip

Tip copy goes here.

Is there a consequence we can illustrate? something won't happen, or allow something?:

A tax must be created before it can be to a revenue class or a menu item.

Test the tax setup thoroughly to understand how specific taxes are reported.

pulled from instructions... If the desired tax does not yet exist, create it. Only after the tax amount and name has been created can it be then applied or linked to menu items or a revenue class.

### Tax Reports

Tip copy goes here.

# About Taxes in Dinerware

Learn how to set up tax amounts and how to attribute those taxes to specific items within the Dinerware system. Dinerware **does not** address local, state or federal tax requirements for any business.

**Important:** Specific rules and exceptions apply to businesses so Dinerware strongly recommends owners **first consult a certified tax professional**, such as a CPA, to ensure correct rates can be set up in the Dinerware system.

This document provides the following:

- An introduction to taxes, revenue classes and menu items**
- How to create a new tax**
- How to assign a tax to a revenue class**
- How to set tax rates for individual menu items**
- How to make liquor/beer/wine taxes "hidden taxes"**

## Taxes, Revenue Classes and Menu Items

A **tax** is an added amount, and can be a flat number or a percentage. In some cases, some taxes are flat and others are a percentage and both types may need to be set up in Dinerware. Taxes can be attached to different items set up in the Dinerware system.

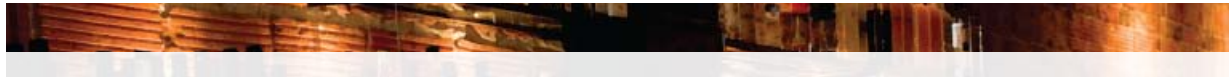
A **revenue class** is a group of menu items that share tax and accounting rules.

Alcohol sales and food sales are often taxed at different rates. Taxes and Revenue Classes track sales of these differently taxed groups.

Specific tax rates can be applied to either revenue classes or individual menu items. If menu items are assigned to a revenue class first, a tax can be applied to a whole class in one step. Menu items may also be taxed individually.

## How to create a new tax

A tax must be created before it can be to a revenue class or a menu item. Use the menu,



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### Tip:

#### How to make Liquor/beer/wine taxes "Hidden Taxes"

1. From the Manager screen, touch 'Menu'
2. Touch 'Taxes' (bottom of the screen)
3. Choose 'New' to create a Liquor, Beer and/or Wine Tax.
4. Type in the tax name, and tax percentage or flat fee tax amount
5. Select the "Hidden Tax" check box.
6. Select item groups and/or revenue classes to which this tax is applied.

# About Taxes in Dinerware

revenue, and tax setup screens.

**Important!** Consult a certified tax professional to learn tax rates required before setting up taxes in the Dinerware system.

**Log On** to the terminal using your four-digit PIN.

1. From the Manager screen, touch '**Menu.**'
2. Touch '**Taxes.**'
3. Touch '**New.**'
4. **Name the tax** (example: "State Liquor Tax").
5. Enter the tax **amount** and **specify how it is applied.**
6. Select the appropriate check box to specify if the tax is either:
  - A percentage of the price

**OR**

  - A flat fee
7. To link the tax to specific Menu Items, select the appropriate boxes on the Items list.
8. To link the tax to revenue classes, select the appropriate check boxes on the 'Revenue Classes' list on the far right.

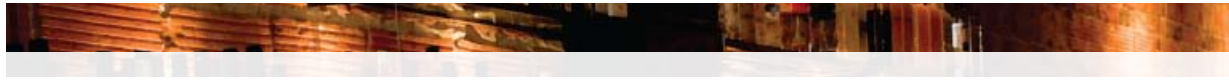
## How to assign a tax to a revenue class

Alcohol sales and food sales are often taxed at different rates. Use the Taxes and Revenue Class functions to track sales of these differently taxed groups.

By linking a tax to a revenue class, that tax can be applied to all menu items in a single simple step.

**Log On** to the terminal using your four-digit PIN.

1. From the Manager screen, touch '**Menu.**'



## OPERATOR

This guide is Intended for daily use of the system

# About Taxes in Dinerware

2. Choose **'Taxes.'**
3. Select the tax to assign to the revenue class.
4. Touch **'Edit.'**
5. To link the tax to specific menu items, select the appropriate check boxes on the Items list.

## How to set tax rates for individual menu items

Some Menu Items may have individual taxes associated with them.

**Log On** to the terminal using your four-digit PIN.

1. Log in and go touch **'Manager.'**
2. Choose **'Menu.'**
3. Choose **'Taxes.'**
4. **Select the tax** to assign to the menu item.

If the tax does not yet exist, create it.

5. Choose **'Edit.'**
6. To link the tax to specific menu items, **select the check boxes** on the **'Items'** list.