Oracle® Hospitality Simphony
User Guide

Release 2.9

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Preface

Oracle Hospitality Simphony is a cloud-based Point-of-Sale (POS) solution that provides business management capabilities using a single tool with vast integration capabilities to property management systems, paperless kitchen display systems, credit card interfaces, and reporting applications.

Purpose

This User Guide explains the daily use of Simphony at the POS client.

Audience

This document is intended for Oracle Hospitality Simphony workstation operators.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com/en/industries/hospitality/.

Simphony eLearning

The Simphony Learning Subscription provides additional product knowledge through interactive training, guided video tours, and helpful knowledge checks. After exploring the documentation library, use your Oracle Single Sign On to check out the Simphony learning opportunities at Hospitality Learning Subscriptions.

Revision History

Date	Description of Change
October 2016	Initial Publication
January 2017	Updates to publication for Simphony version 2.9.1

Date	Description of Change
July 2017	Updates to publication for Simphony version 2.9.2
August 2017	Updates to publication
November 2017	Updates to publication for Simphony version 2.9.3

1
Starting Your Shift

Workstation operators sign on and sign off of the workstation securely. Workstation operators sign on by entering a unique employee ID number or by swiping an employee magnetic card. To sign on to a workstation, a workstation operator must have an employee ID number and be associated with an employee role that has the Allow Sign-In to a Workstation privilege.

If the employee is set up to clock in, the employee must first clock in before signing on to the workstation.

Topics:

- Signing On and Off of a Workstation
- Clocking In and Out
- Incrementing a Shift
- Using Tip Track
- Running Shift Reports

Related Topics:

- Signing On and Off of a Workstation
- Clocking In and Out
- Incrementing a Shift
- Using Tip Track
- Running Shift Reports

Signing On and Off of a Workstation

1. To sign on to a workstation, enter the **Employee ID Number** or swipe the employee magnetic card in the reader attached to the workstation.

2. If the workstation has multiple revenue centers, select the revenue center, and then touch **OK**.

3. Touch **Sign In**.

4. To manually sign out of a workstation, click **Sign Out**.

5. Stay Down Operators can sign out using the **Cancel Transaction** function key when not in a transaction.

6. The workstation automatically signs out Pop Up Operators after performing a service total or paying a check, and clicking the **Cancel Transaction** function key to end a transaction.

Related Topics:

- Starting Your Shift

Clocking In and Out

Employees assigned to one or more one job codes must clock in. When a workstation is offline but can communicate with other workstations and services, employees can clock in. When a workstation is offline (no network communication) and unable to communicate with other workstations and services, employees cannot clock in.

1. Click the **Clock In** function key.

2. If you have multiple job codes, select the job code, and then click **OK**.

3. If you have privileges, change the revenue center, and then click **OK**.

4. Close all guest checks before clocking out at the end of a shift unless you have the privilege to clock out with open checks.

5. Click the **Clock Out** function key.

Related Topics:

• Starting Your Shift

Incrementing a Shift

When a shift increments, the employee's financial report resets to 0 (zero). This process often occurs when:

• An employee works a double shift and the employee must make a deposit at the end of each shift. For example, an employee can work the breakfast shift and make a deposit of all cash due. Then, the employee can increment the shift so the lunch shift starts at 0.00. At the end of the lunch shift, the employee knows how much money to deposit without having to subtract the breakfast totals.

• A shift spans a business day. For example, if an employee's shift is from 1:00 a.m. to 9:00 a.m., and Start of Day runs at 3:00 a.m., you can configure Simphony so the employee's report shows all activity from 1:00 a.m. to 9:00 a.m. In this situation, the employee's report does not reset at 3:00 a.m.

You can increment shifts using the Employee PMC Procedure or with one of the increment shift function keys.

1. To increment a shift, select one of the following function keys:

   • **863 - Increment Employee Shift for Signed-In Operator**: Select this key to increment the shift for the signed-in workstation operator.

   • **864 - Increment Employee Shift, Prompt**: Select this key to have the workstation show a list of employees. You can then select an employee and click the **Increment Shift** link.

   • **865 - Increment Cashier Shift for Signed-In Operator**: Select this key to have the workstation increment the shift for the cashier associated with the signed-in workstation operator or the cashier associated with the workstation.

   • **866 - Increment Cashier Shift, Prompt**: Select this key to have the workstation show a list of cashiers. You can then select a cashier and click the **Increment Shift** link.

2. To increment a shift for the employee signed in to the workstation using the PMC Procedure, click **Increment Current Employee Shift**.

Related Topics:

• Starting Your Shift

Using Tip Track

Servers can use Tip Track to:

• Share tips with other employees

• Edit tip-outs

• Claim tips from other employees

You cannot use Tip Track with Labor Management Cloud Service.

1. Click the **Tip Track Tip Out** function key.

2. Enter the tip out amount, and then click **OK**.

3. From the Select Employee dialog, select the employee to tip-out, and then click **OK**.

   Employees shown in the Select Employee dialog have the **Claim Tips From Other Employee** privilege.

4. To share the tip with another employee, click **Yes** at the prompt, and then repeat Steps 2 through 4.

5. To edit tip-outs given by the signed-on employee:

   a. Click the **Tip Track Edit My Tips** function key.

   b. From the Select The Tip To Adjust dialog, select a tip transaction.

      To revise the tip amount, click **Edit Tip Amount**, enter the new tip amount, and then click **OK**.

      To change the receiving employee, click **Edit Employee**, select a new receiving employee from the list, click **OK**, and then click **Yes**.

   c. Click **Done**.

6. To edit the tip-outs given by other employees:

   a. Click the **Tip Track Edit** function key.

   b. In the Select Employee dialog, select the employee that shared the tip.

   c. In the Select The Tip To Adjust dialog, select a tip transaction.

      To revise the tip amount, click **Edit Tip Amount**, enter the new tip amount, and then click **OK**.

      To change the receiving employee, click **Edit Employee**, select a new receiving employee from the list, click **OK**, and then click **Yes**.

   d. Click **Done**.

Related Topics:

• Starting Your Shift

Running Shift Reports

You must have the appropriate privileges to run shift reports.

1. Open the Reports List from the workstation.

2. Select one of the following reports or enter the Report Number, and then click **OK**.

    •   **Employee Financial Report**

    •   **Employee Financial - VAT Report**

    •   **Employee Tip Report**

    •   **Cashier Financial Report**

    •   **Offline Employee Financial Report**

    •   **Offline Employee Cashier Report**

3. (Optional) Change the revenue center in the **View** field.

4. Select the **Employee**, and then select the **Period**.

5. If you selected **Custom** for the **Period**, select the **Custom Start** and the **Custom End** dates.

6. Select the **Shift**. The following table describes the shift filtering options.

Table 1-1   Shift Filtering Options

Shift	Description
Current	Limits the report scope to the current shift. This is the default option.
All Shifts, Consolidated	Shows the information for all shifts. The report does not separate the information by shift.
All Shifts, Unconsolidated	Shows the information for all shifts. The report contains a separate section for each shift.
Custom	Shows only the information relevant for the Shift Number that you select.

7. If you selected **Custom** for the **Shift**, select a **Shift Number**.

8. (Optional) Select the **Workstation**, and then select the **Cash Drawer**.

9. Click **Run Report**.

    If you do not have privileges to run the report, a message appears and the application returns to the Reports list.

10. (Optional) To print the report on the receipt printer, click the **Print** button.

11. Click **Close** to close the Reports dialog.

Related Topics:

•   Starting Your Shift

2

Creating Guest Checks

A guest check is a record of all sales on a check, from the customer's first order to final payment. Guest check detail includes the following information:

- Menu Items
- Discounts
- Service Charges
- Voids
- Returns
- Tenders

Topics:

- Beginning and Closing a Check
- Beginning a Fast Transaction
- Adding the Guest Count to a Check
- Order Handling on Open Checks
- Sending Items to Order Devices While Remaining on the Check
- Holding Menu Items on a Check
- Holding Selected Items or an Entire Order for a Preset Time
- Ending the Current Round and Closing Checks with Items on Hold
- Indicators on the Employee Check Journal Report
- Creating and Picking Up Suites Checks
- Adding Suites Owner Information to a Check
- Combining Checks in the Same Revenue Center into One Order
- Combining Checks Across Revenue Centers into One Order
- Understanding Check Transfers
- Transferring a Check Within a Revenue Center
- Transferring a Check to Another Revenue Center
- Understanding Suspend and Resume Checks
- Suspending and Resuming a Check
- Team Service and Team Checks
- Transaction Handling with Team Checks
- Team Service and Check Adjustment
- Combining Team Checks
- Creating a Service Team

- Adding Employees to an Existing Service Team
- Removing an Employee from a Service Team
- Printing Team Member Names
- Deleting a Service Team
- Creating a Team Check
- Adding a Service Team to an Open Check
- Removing a Service Team From an Open Team Check
- Identifying Team Checks
- Team Check Transfers
- Using Follow Me to Share Checks Among Servers
- Setting and Changing the Default Printer
- Printing Customer Receipts in Multiple Languages

Related Topics:

- Beginning and Closing a Check
- Beginning a Fast Transaction

Beginning and Closing a Check

You start a transaction using a function key. You must have the privileges to begin a guest check and to begin a check by table.

1. To begin a check, sign on to the workstation, and then select one of the function keys described in the following table:

Table 2-1   Begin Check Function Keys

Function Key	Begins a Check ...
399 - Begin Party Check	By party check. Enter guest information (name, address, phone number).
400 - Begin Check by Number	By check number. Typically, the workstation automatically generates check numbers in numeric order. If the revenue center has the option **Operator Assigns Check Numbers** set, you must manually enter the check number.
401 - Begin Check by Table	By table number or table ID. Typically, severs who are assigned to a section of tables use this function to begin a check.
435 - Begin Check by ID	By guest check ID. Typically, bartenders use this function to identify a guest. For example, a bartender can enter an ID to show a guest's name or shirt color to more easily identify the check on the Open Check Screen Look Up (SLU).

2. To close the check, select the function key to pay.

3. Tender the check using the guest's payment method.

Related Topics:

- [Creating Guest Checks]

Beginning a Fast Transaction

A fast transaction lets you start a transaction without having to select a Begin Check function key. Fast Transactions are often used in retail or concession environments where a workstation operator stands in one place and quickly adds transactions repeatedly without assigning guests to table or check numbers.

1. Sign on to the workstation.

2. Click any menu item key.

Related Topics:

- [Creating Guest Checks]

- [Beginning and Closing a Check]

Adding the Guest Count to a Check

The guest count (sometimes referred to as cover count) is the number of guests assigned to a guest check. You can use the following methods to assign the guest count, depending on the configuration:

- Begin a check

- Use the **Number of Guests** function key during a transaction

- Pick up a check and perform a service charge

- Add a menu item (for example, a particular beverage) to the check

1. To add the guest count when beginning a check:

   a. Sign on to the workstation.

   b. Click a **Begin Check** function key.

   c. Enter the number of guests at the workstation prompt.

2. To change the count on an open check during a transaction:

   a. Click the **Number of Guests** function key.

   b. Enter the number of guests at the workstation prompt.

Order Handling on Open Checks

Simphony allows you to control when menu items on open guest checks are sent for preparation to order devices, such as remote printers or a kitchen display system (KDS). You can:

- Send orders while remaining on the guest check without having to pick up the check again or sign back into the workstation

- Take orders for an entire service round, but hold the items and send them in groups over a period of time

- Configure the workstation to automatically send items or an entire order at a preset time

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- Choose to send items on hold to order devices or keep them on hold when ending the current service round

You have control over open check menu items except:

- Items that are already sent to order devices
- Voided menu items

Related Topics:

- Sending Items to Order Devices While Remaining on the Check
- Holding Menu Items on a Check
- Holding Selected Items or an Entire Order for a Preset Time
- Ending the Current Round and Closing Checks with Items on Hold
- Combining Checks in the Same Revenue Center into One Order
- Combining Checks Across Revenue Centers into One Order
- Indicators on the Employee Check Journal Report

Sending Items to Order Devices While Remaining on the Check

1. Begin a check and add menu items.
2. Click the **Send and Stay** Service Total tender key. Menu items are sent to order devices.

   Sent menu items are treated as previous round menu items. The check preview on the open check screen lookup (SLU) shows yellow for other workstations in the revenue center.

3. If your system has workstation alerting enabled and menu items fail to send to the order device/KDS or kitchen printer, the **Alerts** function key flashes in one or more status bars. To handle the alert notification and ensure that the kitchen staff is aware of items which need to be prepared:

   a. Click one of the following function keys:

      - **Alerts**
      - **Show Checks With Failed Prints To KDS/Order Device**

      The Checks Failed to Print on Order Device dialog appears listing all checks (for the currently signed in employee) with items that failed to send to an order device. This dialog also lists the order devices which did not confirm receiving the print job.

   b. Select a check in the list, and then click the **View** button.

   c. On the Check – Items Failed To Print On Order Devices dialog, note the items and order devices, and then notify the kitchen staff of the menu items that did not reach the kitchen for preparation.

      If the POS client device loses wireless network connectivity, return to the range of Wi-Fi coverage to ensure that items are sent to the order device.

      If the kitchen printer is out of paper, add a paper roll to the printer.

      If the KDS Controller or Print Controller is turned off, restart it.

  d. After remedying the situation, click the **Acknowledge** button. The check item is removed from the list.

  To return to the Checks Failed to Print on Order Device dialog if there are more alerts to be acknowledged, click the **OK** button.

  To close the Check – Items Failed To Print On Order Device dialog without taking action, click the **Cancel** button; the **Alerts** button will continue to flash for 30 minutes from the time of failure of the last check.

  The list of checks with unsent items will follow the employee from workstation to workstation.

4. Add more menu items to the check.

5. Repeat Steps 2 through 4 until you complete the order for the current round.

6. End the current service round by sending the remaining items to the order devices.

Related Topics:

• Order Handling on Open Checks

• Indicators on the Employee Check Journal Report

Holding Menu Items on a Check

The following table describes different ways to hold menu items and how to end the current service round:

Table 2-2   Hold Tasks

Action	Instructions	Workstation Shows ...
Hold the entire order and begin a new guest check	Add menu items, and then click the **Hold Order** Tender/Media type function key.	The letter H next to all of the held items
Hold a single menu item	Select an item, and then click the **Hold** function key.	The letter H next to the held item
Hold menu items as you add items to the check	Click the **Transaction Hold** function key, and then add menu items.	The letter H next to all of the items on hold
Release held menu items from their hold status	Select menu items on hold, and then click the **Hold** function key.	The letter H (next to the menu items) disappears
Pick up checks that have menu items on hold	Click **Pick Up Check By List**, and then select **Held Items Only** from the **View Type** drop-down list.	Checks with held items only and the letter H next to all the checks

Related Topics:

• Order Handling on Open Checks

• Indicators on the Employee Check Journal Report

Holding Selected Items or an Entire Order for a Preset Time

You can hold selected menu items or an entire order and automatically send them at a preset time.

1. To hold selected menu items or an entire order for a preset time:

   a. Add menu items, and then click **Timed Fire Menu Item**.

   b. Select one or more menu items to hold from the Timed Fire dialog, and then select the fire time by pressing the plus sign (+) and minus sign (–).

   c. To set the fire time for seats or courses, press **Fire by Seat** or **Fire by Course** to filter the items, select the seats or courses for which to set the time, and then configure the fire time.

   d. To hold an item without a specified time, select the item, click **Hold** in the Timed Fire dialog, and then click **OK**.

   The workstation shows the letter T next to items on hold for a preset time and the letter H next to items on hold.

2. To modify configured times:

   a. Pick up the check where menu items are held for a preset time (timed fire checks), and then click **Timed Fire**.

   If you click **Pick Up Check By List**, you can filter checks with items on hold by selecting **Held Items Only** from the **View Type** drop-down list.

   b. Select one or more menu items, change the fire time, and then click **OK**.

   c. Perform a service total.

   If you change the fire time of an item to 00:00, the item is sent to the kitchen when you perform a service total.

   The workstation shows an asterisk (*) next to all sent menu items.

3. To view the date and time each item was ordered and sent to the order devices:

   a. Pick up a check.

   When you click **Pick Up Check By List**, you can filter checks with items on hold by selecting **Held Items Only** from the **View Type** drop-down list.

   b. Click **View Fire Times**.

   The workstation shows the date and time that a menu item was ordered and sent on picked up checks. For example:

```
1 Walkabout Bowl 4.29

--Ordered 10/29/2015 1:25PM

--Sent 10/29/2015 1:43PM

--Ordered 10/29/2015 1:25PM

--Sent 10/29/2015 1:43PM
```

   If menu items are not sent to order devices, the workstation shows the timer setting for each held menu item. For example:

```
--Chicken Bowl 00:15
```

Related Topics:

- Order Handling on Open Checks
- Indicators on the Employee Check Journal Report

Ending the Current Round and Closing Checks with Items on Hold

The following table describes various ways to end the current round and close checks with held items:

Table 2-3   Ending Current Service Round and Closing Checks with Items on Hold

Action	Instructions	Workstation Shows ...
Send all items (including held menu items) but not items held for a preset time	Click the **Fire Order** Tender/Media type.	An asterisk (*) next to all of the sent items
Send all items except for the ones on hold	Click the **Keep Held Status** Tender/Media type.	The letter H next to the held items and an asterisk (*) next to the sent items
Make a payment and close a check with held menu items	Click a touchscreen button assigned to a payment method (for example, Cash or Credit Card).	A dialog box inquiring what action to take depending on the environment configuration Click **Send Now** to send all items on hold to the order devices. Click **Do Not Send** to close the check without sending the items on hold to the order devices.

Related Topics:

- Order Handling on Open Checks
- Indicators on the Employee Check Journal Report

Indicators on the Employee Check Journal Report

The following table describes the symbols that you see on checks with held items:

Table 2-4   Check Journal Reports Indicator for Held Menu Items

If Items are…	Check Journal Shows…
On hold	The letter H next to the items on hold
On hold for a preset time	The configured time in the 24-hour format next to each menu item
Sent to the kitchen	Three asterisks (***) in front of the previously held menu items

Table 2-4   (Cont.) Check Journal Reports Indicator for Held Menu Items

If Items are…	Check Journal Shows…
Released from their hold status and sent	A pound sign (#) in front of the menu items

Related Topics:

- Order Handling on Open Checks

- Sending Items to Order Devices While Remaining on the Check

- Holding Menu Items on a Check

- Holding Selected Items or an Entire Order for a Preset Time

- Ending the Current Round and Closing Checks with Items on Hold

- Combining Checks in the Same Revenue Center into One Order

- Combining Checks Across Revenue Centers into One Order

Creating and Picking Up Suites Checks

1. Press the **Pickup Suites Check** function key, enter the suite number, and then press **OK**.

2. To create a new Suites check:

   a. Select a suites owner that does not have a check number from the list, and then press **OK**.

   b. If the suite owner's name is not in the list, select **0 - ADD GUEST**, press **OK**, enter the suite guest name, and then press **OK**.

   c. Add menu items to the Suites check, and then end the current service round.

3. To pick up an existing Suites check:

   a. Select a suites owner with a check number from the list (for example, John Smith CHK #435), and then press **OK**.

   b. If the suites owner has multiple Suites checks, enter the check number that you want to pick up, and then press **OK**.

   c. Make the necessary changes to the Suites check, and then end the current service round.

Adding Suites Owner Information to a Check

1. Press the **Add Check to Suite** function key, enter the suite number, and then press **OK**.

2. Enter the suite guest name, and then press **OK**.

3. Enter the number of the check to add guest information, and then press **OK**.

4. Select the suite guest name that you entered in Step 2 from the suites owner list, and then press **OK**.

5. Make the necessary changes, and then end the current service round of the Suites check.

Combining Checks in the Same Revenue Center into One Order

There are two ways you can combine checks within the same revenue center: by check number and by table number.

1. To view a list of all open checks in the revenue center before combining:

    a. Pick up a check to combine with another.

    b. Press the **Add/Transfer Check SLU** function key.

    c. Select the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.

2. To combine checks using the check number:

    a. Pick up a check to combine with another.

    b. Press the **Add/Transfer Check by Number** function key.

    c. Enter the number of the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.

    d. (Optional) Add more menu items to the check.

    e. End the current service round.

3. To combine checks using the table number:

    a. Pick up a check to combine with another.

    b. Press the **Add/Transfer Check by Table** function key.

    c. Enter the table number on the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.

    d. (Optional) Add more menu items to the check.

    e. End the current service round.

Related Topics:

- Order Handling on Open Checks
- Indicators on the Employee Check Journal Report

Combining Checks Across Revenue Centers into One Order

There are two ways you can combine checks from different revenue centers: by check number and by table number.

1. To view a list of all open checks in the revenue center before combining:

    a. Pick up a check to combine with another.

    b. Press the **Add/Transfer from List Prompt RVC** function key, select the revenue center that has the check you want to combine, and then press **OK**.

    c. If the workstation has separate touchscreen buttons configured for each revenue center for viewing a list of all open checks, press the touchscreen button configured for combining checks from the revenue center that has the

check. For example, if the check is in revenue center 1, press the **Add/ Transfer Check by List RVC 1** function key.

    d. Select the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.

2. To combine checks using the check number:

    a. Pick up a check to combine with another.

    b. Press the **Add/Transfer Check by Number Prompt RVC** function key, select the revenue center that has the check you want to combine, and then press **OK**.

    c. If the workstation has separate touchscreen buttons configured for each revenue center for combining checks, press the touchscreen button configured for combining checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Number RVC 1** function key.

    d. Enter the number of the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.

    e. (Optional) Add more menu items to the check.

    f. End the current service round.

3. To combine checks using the table number:

    a. Pick up a check to combine with another.

    b. Press the **Add/Transfer Check by Table Prompt RVC** function key, select the revenue center that has the check you want to combine, and then press **OK**.

    c. If the workstation has separate touchscreen buttons configured for each revenue center for combining checks, press the touchscreen button configured for combining checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Table RVC 1** function key.

    d. Enter the table number that is on the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.

    e. (Optional) Add more menu items to the check.

    f. End the current service round.

Related Topics:

• Order Handling on Open Checks

• Indicators on the Employee Check Journal Report

Understanding Check Transfers

Transferring a check allows a workstation operator to take ownership of a check from another workstation operator or another revenue center. For example, a couple arrives at a restaurant to find that there are no tables available, so they go to the bar for drinks. The bartender starts the check. When a table opens, the check is transferred from the bartender to a server in the dining room, so the customer only has to pay one check at the end of the visit.

Workstation operators can transfer checks between revenue centers only when the automatic service charge for the revenue centers are the same. The following table provides examples and explains when you can transfer checks between revenue centers:

Table 2-5   Examples of Check Transfers between Revenue Centers

Automatic Service Charge of Current Revenue Center	Automatic Service Charge of the Check's Revenue Center	Can Transfer?
0	0	Yes
0	1	No
1	0	No
1	2	No
2	2	Yes

To take ownership of a check you must be on the default transaction screen. If you attempt to transfer while in a transaction (a check is open on the check detail area), the workstation merges the checks rather than transferring ownership.

Related Topics:

- Transferring a Check Within a Revenue Center
- Transferring a Check to Another Revenue Center

Transferring a Check Within a Revenue Center

There are three ways you can transfer open checks from one server to another within the same revenue center: simultaneously, by check number, and by table number.

If the revenue center uses events, you can transfer open checks from one server to another within the same event or event area. You cannot transfer open checks across different events or areas.

1. To view a list of all open checks in the revenue center before transferring:

    a. Press the **Add/Transfer Check SLU** function key.

    b. Select a check from the list, and then press **OK**.

2. To transfer all checks belonging to another workstation operator simultaneously:

    a. Press the **Auto Block Check Transfer** function key.

    b. Select an employee or enter the ID of the employee whose checks you want to transfer, and then press **OK** twice to confirm.

3. To transfer a check using the check number:

    a. Press the **Add/Transfer Check by Number** function key.

    b. Enter the check number, and then press **OK** twice to confirm.

4. To transfer a check using the table number:

    a. Press the **Add/Transfer Check by Table** function key.

    b. Enter the table number, and then press **OK** twice to confirm.

Related Topics:

- Understanding Check Transfers

Transferring a Check to Another Revenue Center

There are two ways you can transfer a check to another revenue center: by check number and by table number.

1. To view a list of all open checks in the revenue center before transferring:

   a. Press the **Add/Transfer from List Prompt RVC** function key, select the revenue center that has the check you want to transfer, and then press **OK**.

   b. If the workstation has separate touchscreen buttons configured for each revenue center for viewing a list of all transferable checks, press the touchscreen button configured for transferring checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by List RVC 1** function key.

   c. Select the check that you want to transfer from the list, and then press **OK**.

2. To transfer a check using the check number:

   a. Press the **Add/Transfer Check by Number Prompt RVC** function key, select the revenue center that has the check you want to transfer, and then press **OK**.

   b. If the workstation has separate touchscreen buttons configured for each revenue center for transferring checks, press the touchscreen button configured for transferring checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Number RVC 1** function key.

   c. Enter the check number, and then press **OK** twice to confirm.

3. To transfer a check using the table number:

   a. Press the **Add/Transfer Check by Table Prompt RVC** function key, select the revenue center that has the check you want to transfer, and then press **OK**.

   b. If the workstation has separate touchscreen buttons configured for each revenue center for transferring checks, press the touchscreen button configured for transferring checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Table RVC 1** function key.

   c. Enter the table number, and then press **OK** twice to confirm.

Related Topics:

- Understanding Check Transfers

Understanding Suspend and Resume Checks

With Suspend/Resume you can:

- Suspend a check started by another employee, and sign on to the workstation.
- Suspend a check when the workstation automatically signs out an employee.

- Suspend a check using the Suspend Order Tender/Media key.

When suspended, the check is stored in the memory until it is resumed.

Related Topics:

- Suspending and Resuming a Check

Suspending and Resuming a Check

To suspend a check, the workstation screen should be free from prompts and error messages. You can add or transfer the suspended check between revenue centers if there are no items pending dispatch to the kitchen. When you suspend a check, the workstation posts the check to the database but does not print it. Suspended checks are not shown in the Open Check SLU (Screen Look Up).

1. To suspend a check, perform one of the following actions:

   - Sign on to the workstation while another employee's check is open.

   - Click the **Suspend Order** tender key.

   You can suspend only one check at a time.

2. To resume a check, sign on to the workstation. You can resume a check only from the workstation that suspended the check.

Related Topics:

- Understanding Suspend and Resume Checks

Team Service and Team Checks

Multiple service personnel tending to one party are referred to as a team. When a team is assigned to a check, the check is referred to as a team check. When Team Service is used, all Tip Reporting totals are distributed evenly among all members of the team. A team can consist of up to 32 members.

Privileged employees, such as managers, can create service teams ahead of time or on the fly, and can add and remove members from a service team before closing a team check. After a team check is closed, changes to the team on the check are not allowed. Edits to teams are reflected in the journal, including team creation, changes to team members, and the deletion of a team.

Being a part of a service team has no impact on your ability to interact with regular checks and has no affect on Tip Report posting for regular checks.

Related Topics:

- Creating a Service Team
- Adding Employees to an Existing Service Team
- Removing an Employee from a Service Team
- Printing Team Member Names
- Deleting a Service Team
- Creating a Team Check
- Adding a Service Team to an Open Check

Transaction Handling with Team Checks

Team members can only post menu items, discounts, service charges, or tenders to a team check when the corresponding Role privileges are granted.

Team Service is not supported with fast transactions (transactions you start without using a Begin Check function key) and Autofire checks. However, after an Autofire check fires, a team can be assigned because it is then considered a regular check.

Transaction Handling When Offline

Team Service operations are available when CAPS is offline. If a service team is created when CAPS is offline, team members should access checks of that team only from the workstation where the team was created as only that workstation is aware of the team. If a team check for that team is picked up at different workstations, it changes to a regular (non-team) check since the team is not recognized.

When CAPS is back online, it updates with all team changes made. Team check transactions should be limited to the originating workstation until the CAPS workstation is updated with all of the team changes. If a team is created at two different workstations with the same name when CAPS is offline, when it is back online, it resolves the duplicated team names (which in normal conditions is not allowed) by appending /1 to one of the team names. For example, if two workstations have a team named Front Team, when CAPS is restored, it renames one of the team names to Front Team/1.

Related Topics:

- Creating a Service Team
- Adding Employees to an Existing Service Team
- Removing an Employee from a Service Team
- Printing Team Member Names
- Deleting a Service Team
- Creating a Team Check
- Adding a Service Team to an Open Check

Team Service and Check Adjustment

You cannot add, remove, or edit a team on a reopened closed check or when adjusting a closed check. When an adjusted or reopened closed check is finalized, Employee Tip Report totals adjust accordingly to reflect the changes in the check. For example, if a charged tip was modified in an adjust closed check of a team check, when the adjustment is complete, Simphony updates the charge tip totals on the Employee Tip Reports of the team members.

Related Topics:

- Creating a Service Team
- Adding Employees to an Existing Service Team
- Removing an Employee from a Service Team
- Printing Team Member Names

- Deleting a Service Team
- Creating a Team Check
- Adding a Service Team to an Open Check

Combining Team Checks

Privileged operators can add regular guest checks to team checks and vice versa.

- When a regular check is added to a team check, the resulting check retains the team members.
- When a team check is added to a regular check, the resulting check is a regular guest check with no team assignment.
- When two team checks are combined, the team of the check added to is retained.

See Combining Checks in the Same Revenue Center into One Order and Combining Checks Across Revenue Centers into One Order for instructions on merging checks.

Creating a Service Team

You need to have the appropriate privileges to perform this task. You can create teams ahead of time or on the fly. A team can have a maximum of 32 members and a single employee can belong to more than one service team.

1. Press the **Create Team Members or Add Team to Check** function key.
2. In the Team Service dialog, press **Add**, enter a name for the team, and then press **OK**.
3. From the Select Employee section of the dialog, select the employees to add to the team, and then press **Add**.

   The dialog only shows employees from the current revenue center that have been designated as available for Team Service.
4. Press **Save**.

Related Topics:

- Team Service and Team Checks
- Transaction Handling with Team Checks
- Team Service and Check Adjustment
- Team Check Transfers
- Removing a Service Team From an Open Team Check
- Identifying Team Checks

Adding Employees to an Existing Service Team

You need to have the appropriate privileges to perform this task.

1. Press the **Create Team Members or Add Team to Check** function key.
2. In the Team Service dialog, select the team to modify, and then press **Edit**.

3. From the Select Employee section of the dialog, select the new employees to add to the team, and then press **Add**.

4. Click **Save**.

Related Topics:

- Team Service and Team Checks

- Transaction Handling with Team Checks

- Team Service and Check Adjustment

- Team Check Transfers

- Removing a Service Team From an Open Team Check

- Identifying Team Checks

Removing an Employee from a Service Team

If you remove the check operator of an open team check from the service team, other team members do not have access to that check as Simphony no longer considers it a team check. When the check operator picks up the team check from which he was removed, the team check becomes a regular check.

You need to have the appropriate privileges to perform this task.

1. Press the **Create Team Members or Add Team to Check** function key.

2. In the Team Service dialog, select the team to modify, and then press **Edit**.

3. From the bottom left section of the dialog, select the employees to remove from the team, and then press **Remove**.

4. Press **Save**.

Related Topics:

- Team Service and Team Checks

- Transaction Handling with Team Checks

- Team Service and Check Adjustment

- Team Check Transfers

- Removing a Service Team From an Open Team Check

- Identifying Team Checks

Printing Team Member Names

You need to have the appropriate privileges to perform this task. The Team List prints to the local report printer assigned to the workstation.

1. Press the **Create Team Members or Add Team to Check** function key.

2. In the Team Service dialog, select the team to print.

3. To print the names of employees in all teams, select **Select All**.

4. Press **Print**.

Related Topics:

- Team Service and Team Checks
- Transaction Handling with Team Checks
- Team Service and Check Adjustment
- Team Check Transfers
- Removing a Service Team From an Open Team Check
- Identifying Team Checks

Deleting a Service Team

You need to have the appropriate privileges to perform this task.

1. Press the **Create Team Members or Add Team to Check** function key.
2. In the Team Service dialog, select the team to delete.
3. To delete all teams, select **Select All**.
4. Press **Delete**.

Related Topics:

- Team Service and Team Checks
- Transaction Handling with Team Checks
- Team Service and Check Adjustment
- Team Check Transfers
- Removing a Service Team From an Open Team Check
- Identifying Team Checks

Creating a Team Check

1. Press the **Begin Team Check** function key, and then press **Yes** when prompted for confirmation.
2. If you belong to multiple service teams, from the Team Service dialog, select the team for which this check belongs, and then press **Select**.
3. If you have the privilege to create service teams, click **Add** to create a new team.

Related Topics:

- Team Service and Team Checks
- Transaction Handling with Team Checks
- Team Service and Check Adjustment
- Team Check Transfers
- Removing a Service Team From an Open Team Check
- Identifying Team Checks

Adding a Service Team to an Open Check

You need to have the appropriate privileges to perform this task.

1. Pick up the appropriate check, and then press the **Create Team Members or Add Team to Check** function key.

2. Select the service team to add to the check, and then press **Select**.

3. To create a new service team, press **Add**.

Related Topics:

- Team Service and Team Checks
- Transaction Handling with Team Checks
- Team Service and Check Adjustment
- Team Check Transfers
- Removing a Service Team From an Open Team Check
- Identifying Team Checks

Removing a Service Team From an Open Team Check

You need to have the appropriate privileges to perform this task.

To remove a service team from a check, pick up the appropriate team check, press **Remove Team From Open Check**, and then press **OK** to confirm.

Related Topics:

- Creating a Service Team
- Adding Employees to an Existing Service Team
- Removing an Employee from a Service Team
- Printing Team Member Names
- Deleting a Service Team
- Creating a Team Check
- Adding a Service Team to an Open Check

Identifying Team Checks

Team checks are denoted by the letter T at the workstation. The Pick Up Check SLU shows the letter T in the tab of the block representing the team check.

Figure 2-1   Teams Checks on the Pick Up Check SLU

The Pick Up Check by List dialog shows the letter T in the Table column.

Figure 2-2   Team Checks on the Pick Up Check by List Dialog

Related Topics:

- Creating a Service Team
- Adding Employees to an Existing Service Team
- Removing an Employee from a Service Team
- Printing Team Member Names
- Deleting a Service Team
- Creating a Team Check
- Adding a Service Team to an Open Check

Team Check Transfers

If a team check is transferred to another team member, the original check operator remains as a team member, but the check ownership changes to the employee to whom the check was transferred.

If a team check is transferred to an employee who is not a member of the team, the original check operator is removed from the team and replaced with the new check

operator. When this occurs, the name of the team changes to the date and time the check transfer took place.

See Understanding Check Transfers for more information.

Related Topics:

• Creating a Service Team

• Adding Employees to an Existing Service Team

• Removing an Employee from a Service Team

• Printing Team Member Names

• Deleting a Service Team

• Creating a Team Check

• Adding a Service Team to an Open Check

Using Follow Me to Share Checks Among Servers

When servers share one or more workstations, inactive checks affect the workflow. The following table outlines a workflow example when two or more servers share a single workstation.

Table 2-6   Sample Workflow When Employees Share a Workstation

Server	Actions
Employee 1	1. Signs on to the workstation and begins a fast transaction by ordering a few beers.
	2. Turns around to speak with a guest but does not perform a service total on the check.
Employee 2	1. Walks to the same workstation and swipes the card to sign on while Employee 1's check is open. Employee 2 is now signed in and Employee 1's check is automatically suspended.
	2. Begins a new fast transaction with an order for fish and chips.
	3. Walks away to get a beer order, leaving the check open on the workstation.
Employee 1	1. Walks to the same workstation and swipes the card to sign on.
	2. Employee 1 automatically resumes the check that was suspended when Employee 2 signed on.
	3. Employee 1 tenders the check.

This sample scenario continues repeatedly in a pub or fast casual restaurant environment. Upon signing on to the workstation, the last suspended check resumes for the signed on employee until that check is either service totaled or paid. After performing a service total or final tender, the employee can begin a new check or pick up an existing check. After an employee performs a service total or final tender, the workstation sends kitchen items to the order device.

This workflow is the same when multiple workstations are present. An employee with a suspended check can sign on to any workstation in the revenue center to automatically resume the check.

The Check Inactivity Timeout causes the workstation to automatically sign the employee out and suspend the check. When the check inactivity timeout elapses, the workstation does not send menu items to order devices. After an employee performs a service total or final tender, the workstation sends kitchen items to the order device.

Setting and Changing the Default Printer

You can set a default printer when one of the printers is configured for the print job (for example, customer receipt or guest check), that printer is assigned to a printer group, and there is no default printer set for the workstation operator/printer type on the workstation. The default printer selections for the workstation operator/printer type combination automatically reset at Start of Day.

1. To set your default printer for the current workstation:

    a. Click a tender media function key or click the **Print** button (if configured).

    b. On the Printer Assignment Needed dialog, select the printer to use for the print job, and then click one of the following buttons

       • **Print and default**: Select this option to print this time, and to set this printer as the default printer for the printer type. (You do not have to select a printer on the next print job.)

       • **Print**: Select this option to print one time. (You are prompted to select a printer again on the next print job.)

    If you previously selected a default printer for the printer type, the default printer is used for the print job, and you will not see the Printer Assignment Needed dialog.

2. To change your default printer selection for the current workstation:

    a. Click the **Change Default Printer Destination** button.

    b. On the Assign Default Destination Printers dialog, select one or more printer types, and then click the **Assign Printer** button.

    c. On the Select a Printer dialog, select the printer, and then click **OK**.

Printing Customer Receipts in Multiple Languages

You can change the language for the customer receipt when more than two languages are configured.

1. Sign on to the workstation.

2. Add menu items.

3. Click the **Print Language List** button.

4. Select the language in the Change Print Language dialog box.

5. Print the customer receipt.

6. If the Print Language 2 button is configured, click **Print Language 2**.

3
Adding Menu Items to a Check

A menu item is the foundation of transactions. Anything ordered is a menu item. In restaurants, food and drinks are menu items. In retail stores, shirts and hats are also considered menu items. Therefore, any item being sold is a menu item.

Topics:

- Screen Look Up (SLU)
- Number Look Up (NLU)
- Splitting Off Items
- Splitting Off Items from a Suites Check
- Understanding Conversational Ordering
- Understanding Combo Meals and Groups
- Creating Combo Meals
- Using the Popup Condiment Orderer
- Declaring Waste
- Correcting Waste Checks

Related Topics:

- Screen Look Up (SLU)
- Number Look Up (NLU)
- Splitting Off Items
- Splitting Off Items from a Suites Check
- Using the Popup Condiment Orderer
- Declaring Waste
- Correcting Waste Checks

Screen Look Up (SLU)

A Screen Look Up (SLU) is a touchscreen button that gives you access to a list of items. Each item in the list is a touchscreen button that you can select. For example, the Open Check SLU displays separate touchscreen buttons for each open check within the revenue center. When you press the touchscreen button corresponding to an open check, the workstation shows the check on the check detail area.

1. Press one of the following function keys:

   - **Open Check SLU**
   - **Menu Item SLU**
   - **Tender Media SLU**

- **Service Charge SLU**
- **Custom Report SLU**
- **Add/Transfer Check SLU**
- **Discount SLU**

2. Press the SLU item key that you want to view, transfer, or add to the check.

Related Topics:

- Adding Menu Items to a Check

Number Look Up (NLU)

A Number Look Up (NLU) is a touchscreen button that you select to access a numbered list of one of the following items:

- Discounts
- Main Levels
- Service Charges
- Sub Levels
- Tender/Media

You can use the touchscreen buttons configured for NLU in two ways to add items, charges, discounts, or tenders to a check.

1. If you know the number of a discount, menu level, service charge, or tender, enter the NLU number using the on-screen numeric key pad, and then select one of the following functions keys:

   - **Discount NLU**
   - **Main Level NLU**
   - **Service Charge NLU**
   - **Sub Level NLU**
   - **Tender/Media NLU**

2. If you do not know the number of a discount, menu level, service charge, or tender, select one of the function keys listed in Step 1.

3. Select an item from the list or enter the NLU number of the appropriate item in the dialog box, and then click **OK**.

Related Topics:

- Adding Menu Items to a Check

Splitting Off Items

1. To split off one item:

   a. Select the menu item on the check, and then click **Split Off Item**.

   b. Make the changes to the new check entry.

2. To split off multiple items:

a. Select a multiple quantity menu item on the check.

b. Using the alphanumeric key pad, select the quantity that you want to split (for example, 2).

c. Click **Split Off Item**.

d. Make the changes to the new check entry.

Related Topics:

• Adding Menu Items to a Check

Splitting Off Items from a Suites Check

1. Press the **Pickup Suites Check** function key, enter the suite number, and then select the Suites check to split.

2. Press the **Touch Split** function key, and then move the items to be paid by another guest to the new Suites check.

3. Press **Save**, and then press **Yes** when prompted for confirmation.

4. If you are prompted for confirmation to print the new Suites check, press **Yes**.

5. Make the changes, and then end the current service round of the original Suites check that is open on the check detail area.

6. Add suites owner information to the new check. For instructions, see Adding Suites Owner Information to a Check.

Related Topics:

• Adding Menu Items to a Check

Understanding Conversational Ordering

Conversational ordering allows you to add menu items to a check in no particular sequence. As a customer places an order, you do not have to interrupt in order to add the items to the check. For example, when ordering a drink in a coffee shop the following menu items are required:

• Drink Type (Espresso, Latte, Mocha, Tea)

• Drink Size (Small, Medium, Large)

• Drink Temperature (Hot, Iced)

• Condiments or Modifiers (Whipped Cream, Cinnamon, Skim Milk)

With conversational ordering, you can add the items in the order that the customer states them (for example, an iced mocha, medium size, with whipped cream). Conversational ordering improves speed of service, ease of ordering for customers, and overall order accuracy.

Understanding Combo Meals and Groups

A combo meal is comprised of two or more menu items grouped together and sold to customers for a special price. Quick service restaurants sell combo meals to increase business by packaging the most frequently requested menu items (for example, hamburger, fries, and a drink) and offering them for a lower price than à la carte items.

Simphony creates a combo meal using two or more combo meal groups. In the following figure, for example, you must add a menu item from each combo meal group to create a pizza combo meal.

Figure 3-1   Relationship Between a Combo Meal and Combo Groups
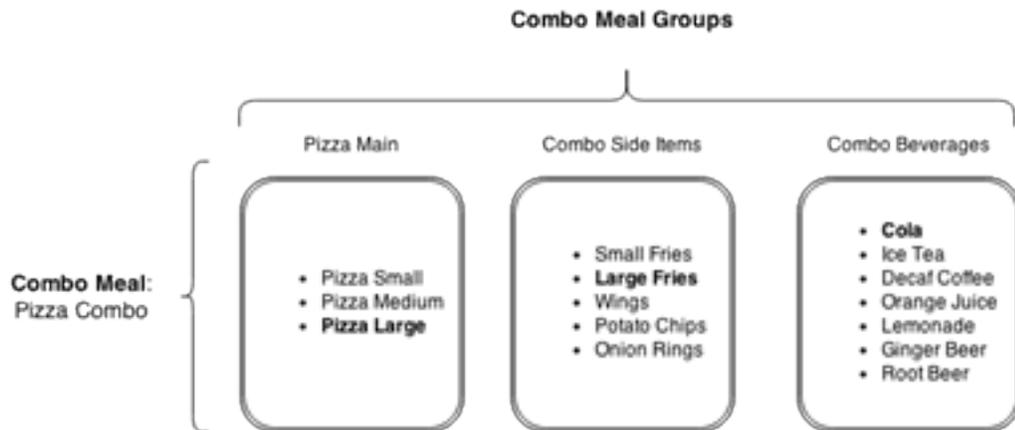
Creating Combo Meals

Simphony offers various ways to create combo meals and to modify the menu items that compose the meal. The instructions assume that the workstation is not configured to recognize and create combo meals automatically while you add items to the check.

1. To view the types of combo meals you can create using the items on a check:

    a. Click the **Auto Combo** function key.

    b. To create one combo meal, click **OK** to confirm the combo meal.

    c. To create multiple combo meals, select a combo meal from the Combo Meal dialog box, and then click **OK**.

    d. If the combo meal requires additional side items to complete the meal, add the remaining side items, and then end the current service round.

2. To create a combo meal on a check from a primary menu item and a side item that make up a combo meal:

    a. Select the primary menu item of the combo meal, and then click the **Combo** function key.

    b. If the combo meal requires additional side items to complete the meal, add the remaining side items, and then end the current service round.

3. To create multiple combo meals using the items on the check:

    a. Click the **Combo Multi Selection** function key.

    b. Select the items to use in the meal, and then click **Combo**.

4. If the workstation has separate buttons configured for combo meals:

   a. Click the button configured for the base menu item of the combo meal (for example, Chicken Sandwich Combo).

   b. Add the primary menu item and the side items to complete the meal, and then end the current service round.

5. To add a bulk combo meal order:

   a. Click the **Bulk Combo Order** function key.

   b. Enter the quantity that the customer requires using the on screen numeric key pad, and then press the button configured for the base menu item of the combo meal (for example, 10 Chicken Sandwich Combo). You can order up to 99 combo meals.

   c. Enter the quantity, and then select the side menu items for the combo meal (for example, 5 Roasted Chicken).

   d. Repeat Step 5-c to add the remaining side items, and then end the current service round.

6. To add a sized combo meal, click one of the buttons configured for the Combo Order Sizes 1 through 4.

7. To change the size (upsize or downsize) of a sized combo meal, select one or more side items from the check, and then click one of the buttons configured for the Combo Order Sizes 1 through 4.

8. To substitute a combo meal side item with another item from the same combo meal group:

   a. Select the side item that you want to substitute from the check, and then click the **Substitute** function key.

   b. Add a new side item.

9. To substitute a combo meal side item with an item from another combo meal group:

   a. Select the side item that you want to substitute from the check, and then click the **Combo Alternate Side** function key.

   b. Add a new side item.

10. To revert the items in the combo meal to à la carte menu items, select the primary menu item of the combo meal, and then click the **Un Combo** function key.

11. To remove a combo meal from a check, select the primary menu item of the combo meal, and then click the **Void** function key.

Related Topics:

• Understanding Combo Meals and Groups

Using the Popup Condiment Orderer

1. Sign on to the workstation.

2. Select a parent menu item that has required condiment groups. The Popup Condiment Orderer appears.

3. Select a required condiment. The Popup Condiment Orderer automatically advances to the second group, and so on until you have selected the required number of condiments from all groups.

4. After you meet the minimum count, click **Done** to move to the next condiment group or to close the Popup Condiment Orderer.

   If you click **Done** without selecting the minimum count of a condiment group, the application remains on the current condiment group and the **Done** button text changes from Done to whatever is needed (for example, Select 2 to 3 Steak Sauce Current Count:1). When you use devices running the Android mobile operating system, you receive an error stating that the required condiment group is not complete for the parent menu item.

5. To modify a previously ordered required condiment:

   a. Select a menu item (condiment or parent) in the check detail area. The Condiment Edit Popup appears if it is configured from the Enterprise Management Console (EMC) RVC Parameters or Menu Item Classes modules.

      To edit a menu item when the Condiment Edit Popup is not configured:

      i. Select the menu item (condiment or parent) in the check detail area.

      ii. Click the **Recall Popup Condiment Orderer** function key.

   b. Change the condiments, and then click **Done**.

Related Topics:

• Adding Menu Items to a Check

Declaring Waste

1. Click the **Declare Waste** function key.

2. Enter the menu item. If more than one of the same item is wasted, select the quantity, and then select the menu item to add to the waste check.

3. Select a waste reason, and then click **OK**.

4. Repeat Steps 2 and 3 to add menu items to the waste check.

5. Perform a service total on the check. A waste receipt prints and the workstation closes the waste check.

Related Topics:

• Adding Menu Items to a Check

• Correcting Waste Checks

Correcting Waste Checks

Unlike guest checks, you cannot reopen closed waste checks. If you over-post menu items in a waste check, you need to post a negative waste check to offset the over-posted menu items.

1. Click the **Transaction Void** key, and then click the **Declare Waste** key.

2. Select the quantity, and then select the menu item you want to remove from the incorrectly entered waste check.

3. Select a waste reason, and then click **OK**.

4. Repeat Steps 2 and 3 to correct additional entries.

5. Perform a service total on the check.

Related Topics:

- Adding Menu Items to a Check
- Declaring Waste

4

Kitchen Display System

A Kitchen Display System (KDS) shows orders that need to be prepared, such as hot and cold items that print in the kitchen, or alcoholic beverages that print at the bar. A KDS enhances kitchen communication and processes.

Topics:

- Using the Kitchen Display System (KDS) and Bump Bar
- KDS Chit Icons
- SEI KDS Chit Markers
- KDS Connection Icons

Related Topics:

- Using the Kitchen Display System (KDS) and Bump Bar
- KDS Chit Icons
- SEI KDS Chit Markers
- KDS Connection Icons

Using the Kitchen Display System (KDS) and Bump Bar

1. To select a chit on the current page, press one of the following buttons:

    - **Select Previous**: Select the previous order on the display.
    - **Select Next**: Select the next order on the display.

2. To move focus between the panels in a split screen KDS Display, press **Panel Swap**.

3. To select the next unstarted order, press **Select Next Unstarted**.

4. To select the first unstarted order on the display, press **Select First Unstarted**.

5. To start the current order and select the next unstarted order, press **Start and Select First Unstarted**.

6. To select an item on the chit, select a chit, and then select the item you want using the **Select Next Item** or the **Select Previous Item** button.

7. To view the next chit on the current page, press **Arrow Left** and **Arrow Right**.

    If you are in chit mode, the KDS moves one chit at a time to the left or right to display the next chit.

    If you are in list mode, the KDS moves up or down to the next line.

8. To send an item on hold because of prep timing to the Prep Station, select the item on the chit from the Expo Display, and then press **Fire Item**.

9. To send all items on hold in an order because of prep timing to the Prep Stations, select the chit from the Expo Display, and then press **Fire All**.

10. To move to the first page of the display, press **Home**.

11. To move to the last page of the display, press **End**.

12. To move between pages, press **Page Left**, **Page Right**, **Page Up** or **Page Down**.

13. To assign a priority to an order, select the chit, and then press any button from **Priority 1** through **Priority 8**.

    Priority 1 has the highest priority and Priority 8 has the lowest priority. The priority shows on the top right corner of the order in chit mode and on the Attn column in list mode.

14. To mark an order as complete and remove the chit from the screen, select a chit, and then press **Done**.

15. To mark the first order on the display as complete, press **Select and Done**.

16. To mark the first order on the display as complete and select the next order, press **Done and Select First**.

17. To mark an item on the chit as complete, select the chit, select the item you want to mark as complete, and then press **Done Item**.

18. To exit the transaction, press **Cancel**.

19. To recall the last order that you marked as complete and restart the timer, press **Recall Last**.

20. To review the last order that you marked as complete, without restarting the timer, press **Review Last**.

21. To review an order from the 50 orders that you marked as complete in the last 15 minutes, without restarting the timer, press **Review with Panel**, and then select the order you want to view.

    This function only works in chit mode.

22. To recall an order from the 50 orders that you marked as complete during the last 15 minutes and restart the timer:

    • To view the orders as order chits, press **Recall with Panel**, select the order you want to recall, and then press **OK**.

    • To view an order list, press **Recall**, select the order you want to recall, and then press **OK**.

23. To recall an order from the 50 orders that you marked as complete during the last 15 minutes, without restarting the timer, press **Review**, select the order you want to recall, and then press **OK**.

24. To recall an item that you marked as complete, select a chit, press **Recall Item**, select the item you want to recall, and then press **Recall Item** again.

25. To recall the last item that you marked as complete, press **Recall Last Item**.

26. To view a list of all production items in the kitchen, press **Production Summary**.

27. To view a consolidated list of active orders for the display station (without condiments), press **Summary Condensed**.

28. To view a consolidated list of active orders for the display station (including condiment items), press **Summary Expanded**.

29. To remotely view orders on another display:

- To select the display from a list, press **Remote View List**, select a KDS Display from the list, and then press **Done**.

- To view orders on the first available KDS Display by record number, press **Remote View Next**.

- To go through KDS Displays that allow remote viewing by record number, press **Remote View Next**, and then press **Next** on the remote toolbar to move to the next display.

You can review, recall, and mark orders as done on other KDS Displays through remote viewing.

30. To mark an order as started, select a chit, and then press **Order Started**.

31. To mark the first order on the current page as started, press **Order Started First**.

32. To change an item's status to start for the Prep Station on a Prep Display (only for single item per suborder chits (SIPS)):

    a. Select a chit with a single item, select the item you want to mark, and then press **Prep Start/Stop**.

    b. To change the status back to fired, press **Prep Start/Stop** again.

33. To view menu items sorted by status, press **Cook Summary**.

    The Cook Summary window shows only menu items and not condiments. On Prep Displays, Fired items appear first followed by Started items. On Expo displays, Sent items appear first, followed by Fired items, then Started items, and finally Done items.

34. To keep an order on the KDS Display and prevent kitchen staff from bumping it, select a chit, and then press **Mark**.

35. To prevent kitchen staff from bumping the first order on the display, press **Mark First**.

    If an order is already selected on the display prior to using this function, the system marks that order and keeps it from being bumped.

36. To keep an item in an order on the KDS and prevent kitchen staff from bumping it, select the chit, select the item you want to hold, and then press **Mark Item**.

37. To push an order to another KDS Prep Station in the revenue center using a Prep Display:

    a. Select a chit, press **Push Order**, and then select the KDS Prep Station.

    b. Press **OK** to confirm, or press **Cancel** to exit without pushing the order.

38. To pull an order from another KDS Prep Station in the Prep Station's primary distribution group using a Prep Display, press **Pull Order**.

39. To view table details for checks you begin by table using an SOS Display, select a chit, and then press **Table Detail**.

40. To view media files on recipe preparations or other work-related tasks, press **Media Viewer**, and then select the file you want to view.

41. To view media files related to the items in an order, select a chit, and then press **Media Viewer**.

42. To minimize the KDS application to the toolbar (Microsoft Windows 32-bit displays), press **Minimize**.

43. To close the KDS application, press **Close**.

Related Topics:

- [Kitchen Display System](#)

- [KDS Chit Icons](#)

- [SEI KDS Chit Markers](#)

- [KDS Connection Icons](#)

KDS Chit Icons

KDS Displays show various icons that indicate check status or other information. The following table describes the icons that appear on order receipts (chits) at a standard KDS:

Table 4-1   KDS Chit Icons

Icon	Icon Name	Description
	VIP Order	A VIP customer.
	Rush Order	A rush order.
	Recall	The order has been recalled to the display. A recalled order is an order that was previously bumped (marked complete) at a station but has been recalled to display again.
	Void	The item is voided from the order.
	First Alert	The order has passed the First Alert preset time limit.
	Second Alert	The order has passed the Second Alert preset time limit.
	Previous Course Indicator	The order had menu items ordered in the previous round.
	Priority Order 1	The order belongs to Priority level 1.
	Priority Order 2	The order belongs to Priority level 2.
	Priority Order 3	The order belongs to Priority level 3.
	Priority Order 4	The order belongs to Priority level 4.
	Priority Order 5	The order belongs to Priority level 5.
	Priority Order 6	The order belongs to Priority level 6.
	Priority Order 7	The order belongs to Priority level 7
	Priority Order 8	The order belongs to Priority level 8.
	Priority Order Cancel	The priority assigned to the order has changed to none (cancelled).
	Review	The order is being reviewed.

Table 4-1   (Cont.) KDS Chit Icons

Icon	Icon Name	Description
	Prep Status – Inactive Order	Each icon on the chit header represents a Prep Station that the order is not active on.
'	Prep Status – Active Order	Each icon on the chit header represents a Prep Station that the order is active on.
'	Prep Status – Done	Each icon on the chit header represents a Prep Station that has marked the order Done on that Prep Station.
Magenta border	Marked/Parked Order	The order is marked (parked) and cannot be bumped.
An **X** superimposed over the order/ suborder.	Cancelled Order	The order was cancelled. This icon only appears when using DOM mode.
→	Item Sent (from POS)	The item has been sent to the Expo Display, but not to the Prep Station. The icon appears on the Expo Display.
	Item Fired	The item has fired to the Prep Station. The icon appears before the item name.
'	Item Started	The item is being prepared. The icon appears before the item name.
✿	Item Done	The item is marked as Done.
☞	Item Marked/ Parked	The item is marked (parked), and cannot be bumped.
✔	Item Selected	The item is selected.
↻	Item Recalled	The item has been recalled to the display.

Related Topics:

- Kitchen Display System
- Using the Kitchen Display System (KDS) and Bump Bar

SEI KDS Chit Markers

Similar to a standard PC-based KDS, Select Electronics, Inc. (SEI) KDS shows markers on the order receipts to indicate their status. The following table describes the markers that appear on SEI KDS:

Table 4-2   SEI KDS Chit Markers

Marker	Marker Name	Description
VIP	VIP Order	A VIP customer.
>>	Rush Order	A rush order.
Timer shows in yellow on red	First Alert	The order has passed the First Alert preset time limit.

Table 4-2   (Cont.) SEI KDS Chit Markers

Marker	Marker Name	Description
Timer flashing in white on red	Second Alert	The order has passed the Second Alert preset time limit.
	Prep Status – Inactive Order	Each marker on the chit header represents a Prep Station that the order is not active on.
O	Prep Status – Active Order	Each marker on the chit header represents a Prep Station that the order is active on.
X	Prep Status – Done	Each marker on the chit header represents a Prep Station that has marked the order Done on that Prep Station.
PARK	Marked/Parked Order	The order is marked (parked) and cannot be bumped.
DONE	All Prep Done	All suborders are marked Done.
DONE (Flashing)	Oldest All Prep Done	The order on the KDS display that is the oldest (longest time in the kitchen) is marked Done at all Prep Stations.
ReC	Recall	The order has been recalled to the display. A recalled order is an order that was previously bumped (marked complete) at a station but has been recalled to display again.
An **X** superimposed over the order/ suborder.	Cancelled Order	The order was cancelled.
D	Item Done	The item is marked as Done. The marker appears beside the item name.
V	Void	The item is voided from the order.

Related Topics:

- Kitchen Display System
- Using the Kitchen Display System (KDS) and Bump Bar

KDS Connection Icons

The following connection icons appear at the bottom right corner of the screen and indicates whether the KDS Display is properly connected to the KDS Controller.

Table 4-3   KDS Connection Icons

Icon	Icon Name	Description
	Connected	The KDS Display is connected to the KDS Controller.
	Connection Waiting	The KDS Display is waiting for a connection to the KDS Controller.

Table 4-3   (Cont.) KDS Connection Icons

Icon	Icon Name	Description
	Disconnected	The KDS Display is not connected to the KDS Controller.
	Connected to Backup	The KDS Display connected to the backup KDS Controller.
	Disconnected from Backup	The KDS Display is not connected to the backup KDS Controller.

Related Topics:

• Kitchen Display System

• Using the Kitchen Display System (KDS) and Bump Bar

5

Applying Discounts and Service Charges to a Check

A discount is the amount subtracted from a sales transaction to reduce the price. A service charge is the amount added to a sales transaction for a particular service. You can enter discounts and services charges as percentages or amounts.

Topics:

- Understanding Service Charges
- Understanding Discounts
- Applying a Discount Manually
- Applying a Coupon
- Applying a Service Charge
- Applying a Return
- Applying a Condiment Discount

Understanding Service Charges

A service charge is the amount added to a sales transaction for a service rendered. The service charge is posted to one of the following parties:

- The person or people providing the service (for example, a server or bartender, or a team of servers)
- The House or the establishment providing the service

Related Topics:

- Applying a Service Charge

Understanding Discounts

A discount reduces the price of an item or items on a check. The following table describes the types of discounts you can use in Simphony:

Table 5-1   Discount Types

Discount Type	Description
Manual	You manually apply the discount to a check. This is a traditional discount.

Table 5-1   (Cont.) Discount Types

Discount Type	Description
Automatic	The workstation applies a discount when the transaction meets certain criteria. As you add menu items, the workstation looks for items that trigger a discount and then applies the award amount to the check.
	The workstation adds and removes discounts automatically. The workstation removes discounts automatically when another discount presents a better deal for the customer.
	You cannot use the **Void** function key to remove automatic discounts from a check.
Coupon	A coupon discount is an automatic discount. The workstation applies discounts based on conditions within the transaction, but only after you inform the workstation that the discount is available by adding the coupon to the check.
	You cannot use the **Void** function key to remove coupon discounts from a check.
Combination Pricing	The workstation applies an automatic discount or automatic coupon discount for combo meals, where a restaurant charges a single price for multiple items when they appear on a check at the same time.

Related Topics:

- Applying a Discount Manually
- Applying a Coupon
- Applying a Return
- Applying a Condiment Discount

Applying a Discount Manually

You can apply a manual discount to an entire check or to a single item on the check.

1. Begin a check and add menu items.

2. Select the button configured for the appropriate discount.

3. If the discount is an open discount, enter the discount amount or percentage, and then click **OK**.

4. If the workstation prompts, enter the discount reference details, and then click **OK**.

5. To apply a discount to a menu item on the check:

   a. Select the menu item, and then select the button configured for the appropriate discount.

   b. Repeat Steps 3 and 4.

Related Topics:

• Understanding Discounts

Applying a Coupon

You can add a coupon to a check before or after adding the menu items. If the customer presents more than one coupon, Oracle recommends that you add the coupons after adding all menu items to the check. This allows the workstation to more easily add the discounts and calculate the check total.

1. Select the button for the coupon.

2. If the workstation prompts, enter the coupon reference details, and then click **OK**.

Related Topics:

• Understanding Discounts

Applying a Service Charge

1. Pick up a check, and then select the appropriate service charge.

2. If this is an open service charge, enter the service charge amount or percentage, and then click **OK**.

Related Topics:

• Understanding Service Charges

Applying a Return

1. To return one menu item:

    a. Pick up a check or begin a new check, and then click the **Return** function key.

    b. Add the menu item to return to the check.

    c. End the current service round or close the check.

2. To return more than one menu item:

    a. Pick up a check or begin a new check, and then click the **Transaction Return** function key.

    b. Add the menu items to return to the check.

    c. End the current service round or close the check.

Related Topics:

• Understanding Discounts

Applying a Condiment Discount

You can apply a condiment discount manually, automatically, or with a coupon.

1. To apply a discount manually:

    a. Add a parent menu item to the guest check.

    b. Add the condiment that is configured to apply a discount.

    c. Click the button that is configured for the manual condiment trigger function. Simphony applies the discount to the guest check.

    d. Close the transaction.

2. To apply a discount automatically:

    a. Add a parent menu item to the guest check.

    b. Add the condiment that is configured to apply a discount. Simphony applies the discount to the guest check.

    c. Close the transaction.

3. To apply a discount using a coupon:

    a. Add a parent menu item to the guest check.

    b. Add the condiment that is configured to apply a discount.

    c. Click the button that is configured for the coupon condiment trigger function. Simphony applies the discount to the guest check.

    d. Close the transaction.

Related Topics:

• Understanding Discounts

6

Handling Loyalty and Gift Cards

You can use loyalty and gift card operations with Oracle Hospitality Gift and Loyalty and a third-party loyalty or stored value application, unless otherwise noted.

Topics:

- Performing a Loyalty Balance Inquiry
- Issuing Loyalty Points
- Performing a Coupon Inquiry
- Issuing Coupons
- Redeeming a Coupon
- Transferring Points Balance
- Performing Unique Items Inquiry
- Applying a Loyalty Card to a Check
- Performing a Gift Card Balance Inquiry
- Issuing Gift Cards
- Activating Gift Cards
- Reloading Gift Cards
- Transferring Gift Card Balance
- Authorizing Gift Cards
- Redeeming Gift Cards
- Cashing Out Gift Cards
- Issuing a Batch of Gift Cards
- Activating a Batch of Gift Cards
- Redeeming a Gift Card and Issuing Points

Performing a Loyalty Balance Inquiry

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key for loyalty points inquiry.
3. Swipe the card, enter the card number, or look up the account by name or phone number. A message appears indicating the loyalty account balance.
4. Click **Yes** to print the chit.

Issuing Loyalty Points

1. Begin a check and add items that trigger loyalty points.

2. Navigate to the gift and loyalty screen, and then select the function key to issue points to a loyalty account.

3. Swipe the card or enter the loyalty account number. A message appears indicating the points issuance.

4. Perform either a service total or tender the check.

Performing a Coupon Inquiry

1. (Optional) Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to look up coupons.

3. Swipe the card or enter the loyalty account number. A list of available coupons appears.

   • If a check is open, select a coupon to redeem.

   • If a check is not open, click **Yes** to print the coupon.

Issuing Coupons

1. (Optional) Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to issue a coupon.

3. Swipe the card or enter the loyalty account number. A list of ad hoc coupons appears.

4. Select a coupon.

Redeeming a Coupon

1. Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to redeem a coupon.

3. Enter the coupon number obtained from the Gift and Loyalty Advanced website or email.

Transferring Points Balance

1. (Optional) Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to transfer points balance.

3. Swipe the card or enter the card number of the account to transfer from.

4. Swipe the card or enter the card number of the account to transfer to. Both points and personal information transfer.

Performing Unique Items Inquiry

You can perform this operation only with Oracle Hospitality Gift and Loyalty Advanced Cloud Service. You cannot perform this operation with a third-party loyalty application.

1. (Optional) Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key for unique items inquiry.

3. Swipe the card or enter the loyalty account number. A list of menu items that were ordered for the loyalty program appears.

4. (Optional) Print the list of items.

Applying a Loyalty Card to a Check

You can perform this operation only with Oracle Hospitality Gift and Loyalty Advanced Cloud Service. You cannot perform this operation with a third-party loyalty application.

1. Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key for applying a card to a check.

3. Swipe the card or enter the loyalty account number. Depending on the Gift and Loyalty Advanced configuration, you can select from the following actions:

   • **Apply Coupon**

   • **Redeem Points** (redeem partial or full points associated with a loyalty account)

   • **Redeem SVC** (pay a check balance using a stored value card (SVC) (also known as a gift card)

   • **Apply Coupon and Redeem SVC**

   • **Issue Points**

Performing a Gift Card Balance Inquiry

1. (Optional) Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key for gift card balance inquiry.

3. Swipe the card, enter the card number, or look up the account by name or phone number. A message appears showing the monetary value available on the card.

4. Click **Yes** to print the chit.

Issuing Gift Cards

1. Begin a check.

2. Navigate to the gift and loyalty screen, and then select the function key to issue a gift card.

3. Swipe the card or enter the card number.

4. Enter the card amount.

5. Pay the check to a tender, such as cash or credit card.

Activating Gift Cards

1. Begin a check.

2. Navigate to the gift and loyalty screen, and then select the function key to activate a gift card.

3. Swipe the card or enter the card number.

4. Enter the preset card amount.

5. Pay the check to a tender, such as cash or credit card.

Reloading Gift Cards

1. Begin a check.

2. Navigate to the gift and loyalty screen, and then select the function key to reload a gift card.

3. Swipe the card or enter the card number.

4. Enter the amount to add to the card.

5. Pay the check to a tender, such as cash or credit card.

Transferring Gift Card Balance

1. (Optional) Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to transfer the gift card balance.

3. Swipe the card or enter the card number of the account to transfer from.

4. Swipe the card or enter the card number of the account to transfer to. Both funds and personal information (if available) transfer.

Authorizing Gift Cards

This operation is similar to a credit card authorization. The system verifies the amount available on the gift card, but it does not apply the amount to the check. You must redeem the gift card to finalize the amount.

1. Begin a check.

2. Navigate to the gift and loyalty screen, and then select the function key to redeem a gift card with authorization.

3. Swipe the card or enter the card number.

4. Enter the amount to authorize from the card.

- If the amount is less than or equal to the gift card balance, the authorization succeeds. The authorization approves only the gift card balance.
- If the amount exceeds the gift card balance, the authorization fails.

Redeeming Gift Cards

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to redeem a gift card.
3. Swipe the card or enter the card number.
4. Enter the amount to redeem from the card.
   - If the amount is less than or equal to the gift card balance, the card balance is applied to the check and deducted from the card.
   - If the amount exceeds the gift card balance, the full card balance is applied to the check and the card balance becomes $0.00. Apply another tender (cash, credit card, or another gift card) to pay the remaining check balance.

Cashing Out Gift Cards

1. Navigate to the gift and loyalty screen, and then select the function key to cash out a gift card.
2. Swipe the card or enter the card number.
3. Pay the card balance as cash due to the guest.

Issuing a Batch of Gift Cards

You can perform this operation only with Oracle Hospitality Gift and Loyalty. You cannot perform this operation with a third-party stored value application.

You can use the Issue Batch function to issue multiple cards for the same amount (rather than issuing each one individually).

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to issue gift cards in bulk.
3. Select the stored value program, and then click **OK**.
4. Enter the card amount.
5. Enter the number of cards to issue, and then click **Yes** on the confirmation message.
6. Swipe each card or enter each card number, and then click **OK** on the confirmation message.
7. Pay the check to a tender, such as cash or credit card.

Activating a Batch of Gift Cards

You can perform this operation only with Oracle Hospitality Gift and Loyalty Advanced Cloud Service. You cannot perform this operation with a third-party stored value application.

1. Begin a check.

2. Navigate to the gift and loyalty screen, and then select the function key to activate gift cards in bulk.

3. Select the stored value program, and then click **OK**.

4. Enter the preset activation amount.

5. Enter the number of cards to activate, and then click **Yes** on the confirmation message.

6. Swipe each card or enter each card number, and then click **OK** on the confirmation message.

7. Pay the check to a tender, such as cash or credit card.

Redeeming a Gift Card and Issuing Points

You can perform this operation only with Oracle Hospitality Gift and Loyalty Advanced Cloud Service. You cannot perform this operation with a third-party stored value application.

1. Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to redeem a gift card and issue points.

3. Swipe the card or enter the card number.

4. Enter the amount to redeem from the card.

   • If the amount is less than or equal to the gift card balance, the card balance is applied to the check and deducted from the card.

   • If the amount exceeds the gift card balance, the full card balance is applied to the check and the card balance becomes $0.00. Apply another tender (cash, credit card, or another gift card) to pay the remaining check balance.

   The application automatically issues points to the account.

7
Paying a Check

Guests can pay for a check using the methods described in this chapter.

Topics:

- [Tendering with Cash](#)
- [Tendering with One Credit Card](#)
- [Tendering with Multiple Credit Cards](#)
- [Tendering with an Alternate Currency](#)
- [Pay at the Table Charges to a Credit Card or Room Folio](#)
- [Using PATT with Multiple Credit Cards](#)
- [Using PATT with One Credit Card](#)
- [Using PATT for Single Demo Payment](#)
- [Using PATT to Close a Check Through a PMS Tender](#)
- [Charging Menu Items to a Room Folio using Transaction Services](#)

Related Topics:

- [Tendering with Cash](#)
- [Tendering with One Credit Card](#)
- [Tendering with Multiple Credit Cards](#)
- [Tendering with an Alternate Currency](#)
- [Charging Menu Items to a Room Folio using Transaction Services](#)

Tendering with Cash

1. Click the **Cash** function key.
2. When tendering exact cash, click **OK** on the Change Due dialog.
3. When tendering partial cash, enter the **Cash Amount** on the Cash dialog, and then click **OK**.

Related Topics:

- [Paying a Check](#)

Tendering with One Credit Card

You can tender checks using a single credit card based on the workstation configuration. The workstation has one of the following configurations:

- Separate touchscreen buttons for authorizing and finalizing credit card payments
- One touchscreen button to authorize and finalize credit card payments

1. If the workstation has separate buttons:

    a. Press the touchscreen button configured for authorizing the credit card.

    b. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**.

    c. Press the **Credit Card Finalize** function key, enter the check amount, and then press **OK**.

2. If the workstation has one button:

    a. Press the touchscreen button configured for credit card payments.

    b. Enter the check amount, and then press **OK**.

    c. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**.

• Tendering with Multiple Credit Cards

Related Topics:

• Paying a Check

Tendering with Multiple Credit Cards

You can tender checks using multiple credit cards based on the workstation configuration. The workstation has one of the following configurations:

• Separate touchscreen buttons for authorizing and finalizing credit card payments

• One touchscreen button to authorize and finalize credit card payments

1. If the workstation has separate buttons:

    a. Press the touchscreen button configured for authorizing the credit card.

    b. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**.

    c. Repeat Steps 1 and 2 until you authorize all credit cards.

    d. Press the **Credit Card Finalize** function key, select a credit card, and then press **OK**.

    e. Enter the amount to charge the credit card, and then press **OK**.

    f. Repeat Steps 1-d and 1-e until the check is paid in full.

2. If the workstation has one button:

    a. Press the touchscreen button configured for credit card payments.

    b. Enter the amount to charge the credit card, and then press **OK**.

    c. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**.

    d. Repeat Steps 2-a through 2-c until the check is paid in full.

• Tendering with One Credit Card

Related Topics:

• Paying a Check

Tendering with an Alternate Currency

1. Pick up a check, and then press the touchscreen button configured for the foreign currency. For example, if the customer is paying in Euros, press the **Euro** function key.

2. Take note of the amount due in Euros, and then press **OK**.

3. Press the **Cash** function key, enter the amount that the customer paid in Euros, and then press **OK**.

Related Topics:

• Paying a Check

Pay at the Table Charges to a Credit Card or Room Folio

Pay at the Table (PATT) enables a guest to pay the check with a credit card or add payment to a room folio. PATT is supported with Simphony version 2.8 or later and the Oracle Hospitality OPERA 5 Hotel Property Systems version 5.0.04.01 or later.

The server adds menu items in the POS client using one of the following handheld devices:

• Oracle MICROS Table E-Series

• Zebra MC40 (formerly the Motorola MC40) mobile device running on the Android mobile operating system and configured with either an integrated or external magnetic card reader

At the end of the dining experience or when delivering the order to a guest in a hotel room, the server presents a tablet device to the guest with the check. The guest can:

• View the check

• Add a tip or change the tip value

• Select a different language if needed

• Share payment among several guests

• Charge menu items to a credit card or room folio

• Swipe a credit card, or enter a room number and guest last name

• Sign the check with electronic signature after card authorization

• Enter a valid email address and receive a receipt electronically through email, or a printed copy

Related Topics:

• Using PATT with Multiple Credit Cards

• Using PATT with One Credit Card

• Using PATT for Single Demo Payment

• Using PATT to Close a Check Through a PMS Tender

Using PATT with Multiple Credit Cards

Complete the following steps when using PATT for guests sharing payment of the check:

1. Add menu items.

2. Press the **Pay at the Table (PATT)** function.

3. (Optional) Select a different language from the drop-down list to translate the entry fields.

4. Select **Next** on the initial PATT page.

5. (Optional) To change the tip percentage or amount, on the Add a Tip page, tap the **Text** field, and then enter a different tip value.

6. Select **Share Payment**.

7. On the Select the share count page, select the **Share Count Number**, and then select **Next**.

   The Share Count is the number of people sharing the payment. To change the **Share Count**, tap the **Other** text field, enter a different share count value between 1 and 9, and then select **Next**.

8. If the first guest wants to receive an electronic receipt with signature, enter a valid email address, and then select **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.

9. Swipe the first guest's credit card.

10. Enter the guest's signature on the device, and then select **Next**.

11. Repeat Steps 7 through 10 for each guest until the total amount is paid.

Related Topics:

• Pay at the Table Charges to a Credit Card or Room Folio

Using PATT with One Credit Card

Complete the following steps when using PATT for a guest paying the entire check:

1. Add menu items.

2. Press the **Pay at the Table (PATT)** function.

3. (Optional) Select a different language from the drop-down list to translate the entry fields.

4. Tap **Next** on the initial PATT page.

5. If the guest wants to change the tip percentage or amount, on the Add a Tip page, tap the **Text** field, enter a different tip value, and then tap **Next**.

6. To send an electronic receipt with signature to the guest, enter a valid email address, and then tap **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.

7. Swipe the guest's credit card.

8. Enter the guest's signature on the device, and then tap **Next**.

Related Topics:

- Pay at the Table Charges to a Credit Card or Room Folio

Using PATT for Single Demo Payment

Sales executives can demonstrate Pay at the Table (PATT) features to clients without using a magnetic card or card reader.

1. Add menu items.

2. Press the **Pay at the Table (PATT)** function.

3. (Optional) Select a different language from the drop-down list to translate the entry fields.

4. Tap **Next** on the initial PATT page.

5. To change the tip percentage or amount on the Add a Tip page, tap the **Text** field, enter a different tip value, and then tap **Next**.

6. To send an electronic receipt with signature to the guest, enter a valid email address, and then tap **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.

7. Tap within the **Demo Card Swipe** text area.

8. Enter the guest's signature on the device, and then tap **Next**.

Related Topics:

- Pay at the Table Charges to a Credit Card or Room Folio

Using PATT to Close a Check Through a PMS Tender

1. Navigate to the Pay at the Table page, and then tap **Next**.

2. (Optional) Select a different language from the drop-down list to translate the entry fields.

3. If the guest wants to change the tip percentage or amount, on the Add a Tip page, tap the **Text** field, enter a different tip value, and then tap **Next**.

4. To send an electronic receipt with signature to the guest, enter a valid email address, and then tap **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.

5. Press the **PATT Room Charge** function key.

6. Enter the guest's room number, and then tap **Enter**.

7. Enter the last name of the guest.

8. Enter the guest's signature on the device, and then tap **Next**. A Payment Successful Thank You message appears. The total payment is added to the folio.

Related Topics:

- Pay at the Table Charges to a Credit Card or Room Folio

ORACLE

Charging Menu Items to a Room Folio using Transaction Services

A server completes the following steps using a kiosk, mobile device, or TV to charge menu items to a room folio when the property uses Simphony version 2.8 or later and the Oracle Hospitality OPERA 5 Hotel Property Systems version 5.0.04.01 or later.

1. From the **Type** drop-down list, select **Menu Item**, and then enter the value of the menu item in the **Number** field.

2. Click the **Add Item** button.

3. Click **Calculate Total** to see the menu item price.

4. (Optional) From the **Type** drop-down list, select **Service Charge**, and then enter the value of the service charge in the **Number** field.

5. (Optional) From the **Type** drop-down list, select the discount type (for example, Item Discount or Subtotal Discount), and then enter the value of the discount in the **Number** field.

6. From the **Type** drop-down list, select **Tender**, and then enter the value of the loadable payment module tender in the **Number** field.

7. In the **Value** field, enter the total amount due.

8. In the **Add Reference** field, enter the following information:

   • **Room Number**

   • **Serving Period**

   • **Guest Name**

   • **Payment Module**

9. Click **Post Transaction**. The guest room number and name appear on the closed check and print on the receipt.

Related Topics:

• Paying a Check

8
Using Enterprise Cash Management (ECM)

This section describes the operations you can perform with Enterprise Cash Management (ECM). The privileged workstation operator can perform the ECM operations described in this chapter for most receptacles. Individual Receptacle Types lists each receptacle type and indicates the permissible operations. For example, you can open all receptacle sessions, but can adjust a cash deposit only for a bank deposit receptacle session. (You cannot adjust a cash deposit for a safe, till, server bank, or petty cash receptacle.)

The workstation operator must have the appropriate privilege set from the Simphony EMC in order to perform the ECM operations.

Topics:

- Opening a Receptacle Session
- Adding Funds (Safe Only)
- Performing an ECM Paid-In
- Performing an ECM Paid-Out
- Counting a Receptacle Session
- Saving a Count
- Recalling a Count
- Adjusting a Count
- Adjusting a Count Sheet
- Depositing Cash
- Transferring Funds
- Opening, Saving, Recalling, and Submitting a Change Order (Safe Only)
- Reconciling a Change Order
- Removing Funds (Safe Only)
- Reconciling a Receptacle Session
- Adjusting a Cash Deposit (Bank Deposit Only)
- Adjusting a Reference (Bank Deposit Only)
- Till and User Assignment
- Assigning a Till to a Cash Drawer
- Assigning a User to a Till
- Performing Quick Start
- Allowing Access to the Till
- Determining Till Assignment Status with Smart Key

- Adjusting the Starting Amount
- Pulling Cash
- Unassigning a User From a Till
- Unassigning a Till From a Cash Drawer
- Reopening a Receptacle Session
- Viewing Receptacle Status
- No Sale Operation
- Viewing ECM Alerts and Summary with the Engagement Cloud Service
- Swapping Tablets with the Oracle MICROS Base Station
- Offline Cash Management Operations
- Back of House Receptacles Offline
- Till Offline
- Server Bank Offline
- Consolidating Offline Server Banking Sessions
- Individual Receptacle Types
- Property Reports

Opening a Receptacle Session

Where permitted, you can open a new session to track activity in a receptacle. You cannot open a session when the receptacle already has an open session; only one session can be open at a time with the exception of bank deposits.

1. Select the function to open a new receptacle session.

2. If multiple receptacles are available, highlight the appropriate receptacle, and then click **OK**.

3. Click **Yes** at the prompt to create the session for the receptacle.

Adding Funds (Safe Only)

This operation allows you to add new funds to a safe receptacle session. You can use the money that is stored in the safe to fund other receptacles, such as tills and server banks.

1. Select the function to add funds.

2. If multiple safe receptacles are available, highlight the appropriate safe, and then click **OK**.

3. Highlight the type of funds (class) to add, and then click **OK**.

4. Enter the amount of funds, and then click **OK**. A transaction chit prints on the local printer.

Performing an ECM Paid-In

An ECM paid-in operation allows you to accept funds for a cash management receptacle outside of a guest check. For example, the paid-in funds could come from a vendor. These funds increase the receptacle session balance when posted.

1. Select the function to perform an ECM paid-in operation.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

3. Highlight the type of funds (class), and then click **OK**.

4. Highlight the appropriate vendor, and then click **OK**.

5. If an account is not pre-defined for the vendor, the application prompts you to select an account, and then click **OK**. If a pre-defined vendor account is tied to the vendor, the application uses the defined account.

6. Enter a reference for the transaction, and then click **OK**.

7. Enter the amount that is being collected, and then click **OK**.

8. Select the reason code for the transaction, and then click **OK**. You can click **Cancel** to bypass the reason code when not required. The transaction receipts print on the local printer for distribution.

Performing an ECM Paid-Out

An ECM paid-out operation allows you to distribute funds from a cash management receptacle outside of a guest check. For example, the paid-out funds could be paid to a vendor. These funds decrease the receptacle session balance when posted.

1. Select the function to perform an ECM paid-out operation.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

3. Highlight the type of funds (class), and then click **OK**.

4. Highlight the appropriate vendor, and then click **OK**.

5. If an account is not pre-defined for the vendor, the application prompts you to select an account, and then click **OK**. If a pre-defined vendor account is tied to the vendor, the application uses the defined account.

6. Enter a reference for the transaction, and then click **OK**.

   The Invoice screens appear when the Invoice Data Required option is active for the vendor.

7. Enter the required **Invoice Number**, and then click **OK**.

8. Enter the **Invoice Description** (if required), and then click **OK**.

9. Enter the amount that is being distributed, and then click **OK**.

10. Select the reason code for the transaction (if required), and then click **OK**. You can click **Cancel** to bypass the reason code when not required. The transaction receipts print on the local printer for distribution.

Counting a Receptacle Session

You can count a receptacle session based on the Count Sheet defined for the receptacle type. During the counting process, other workstation operators cannot post transactions in order to maintain an accurate count. The person counting can optionally save the count prior to completion, and return later to resume the counting process.

You can view the actual application totals for the defined balancing class in addition to the values entered. A variance between these two values indicates an over or short condition. The manager might instruct you to recount the receptacle when the variance is greater than permissible levels. You must select from a list of pre-defined over or short reasons in order to complete the count. Upon completion of the count, the application prompts for authorization to change the receptacle balance to the amount entered. Upon update, the Count Sheet prints.

1. Select the function to count a receptacle.
2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.
3. Enter a reference for the count, and then click **OK**. The Count Sheet appears.
4. Enter the funds for each of the defined groups on the pages in the count sheet.

   The Count Sheet shows the pages and groups in the order they were set up. Use the navigation options at the top of the sheet to change the page or group shown.
5. (Optional) You can enter the number of defined units within a group. The Count Sheet also accepts keypad entry when a keyboard is physically attached to the workstation on which the count is being performed.
6. Click **Next** to advance to the next unit, group, or page defined.
7. Continue to enter all funds until you reach the Totals page.

   The Totals Page lists the Counted totals based upon the values entered, and may optionally show Expected totals and Variance amounts that differ from the expected amounts. If a variance appears on the Totals Page, select an over or short reason to continue.
8. If the count sheet has an allowable over or short limit, recount the receptacle up to the configured number of times. When the variance falls within allowable levels or you reach the recount limit, you can continue.
9. Click **OK** to save the count.

   If the expected amount does not match the entered amount, the session balance updates to the entered amount on completion of the count. Depending on the configuration, the application prompts for approval to complete this update.

Saving a Count

You can save the count progress for a receptacle session without completing the count. Clicking **Save** allows you to attend to other activities and recall progress in the count at a later time.

Recalling a Count

You can recall an incomplete count for a receptacle session that was previously saved.

1. Select the function to count a receptacle.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

3. If a saved count exists, the application prompts to use the saved count or to start a new count. Click **Yes** to use the saved count. The count sheet appears with previously entered values.

Adjusting a Count

You can correct values from the previous count. When prompted, you must select an Adjust Count Reason from a list to complete the adjustment. Adjusting the amount updates the balance.

1. Select the function to adjust a count.

2. If multiple receptacle counts are available, highlight the appropriate count, and then click **OK**.

3. Select the value you want to adjust: **Amount**, **Reference**, or **Both**.

4. When changing the reference, enter the new reference value, and then click **OK**.

5. When changing the amount, enter the new amount for the class, and then click **OK**.

6. Enter the reason code, and then click **OK**.

Adjusting a Count Sheet

You can change the count sheet that is used to perform a count.

1. Prior to counting, select the function to adjust a count sheet.

2. If multiple receptacles are available, highlight the appropriate receptacle, and then click **OK**.

3. Select the count sheet you want to use, and then click **OK**.

Depositing Cash

You can transfer cash funds from your receptacle to another receptacle designated to receive cash deposits. You must count the receptacle before you can deposit cash. The application transfers cash funds into the destination receptacle and records the transfer as a cash deposit transaction for reporting purposes.

1. Select the function to deposit cash.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

3. If multiple destination receptacles are available (safe or bank deposit), highlight the appropriate session, and then click **OK**.

4. Enter the amount to transfer to the destination receptacle, and then click **OK**. A receipt prints on the local printer.

Transferring Funds

You can transfer funds from one receptacle to another.

1. Select the function to transfer.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

3. If multiple destination receptacles are available, highlight the appropriate session, and then click **OK**.

4. If multiple classes are available, highlight the type of funds (class) to transfer, and then click **OK**.

5. Enter the amount that is being transferred, and then click **OK**.

6. Select a reason code for the transfer. Click **Cancel** to bypass the reason code, or click **OK**. A receipt prints on the local printer.

Opening, Saving, Recalling, and Submitting a Change Order (Safe Only)

You can open a Change Order when a safe runs low on a particular denomination or to stock up for a seasonal or special event. A Change Order operation allows you to create a Change Order Request for the bank. This request contains a defined breakdown of currency units (for example, ones, fives, tens, and so on). You can adjust the PAR Level values for each day of the week and manually adjust counts based on the values calculated for the Change Order.

During the change order process you may be called away to perform other tasks. You can save your place in the change order creation process and recall the Change Order request later.

1. Select the function to open a new Change Order.

2. Highlight the appropriate safe, and then click **OK**.

3. Enter a reference for the Change Order, and then click **OK**.

4. (Optional) Select the day of the week on the PAR Sheet to change the values.

5. The Count column shows the variance between the last count for the receptacle and the PAR Level Set defined from the EMC. You can see what is needed to return to the PAR level. Change each number as appropriate.

   a. To save the Change Order request (without submitting), click **Save**.

   b. To submit the Change Order request, click **OK**, select the submission method, and then click **OK** again. A configured number of Change Orders prints to include in the safe or with the request that is sent to the bank.

Reconciling a Change Order

After a Change Order request is submitted with the new denominational breakdown, the funds must be returned to circulation for use by the application.

1. Select the function to reconcile (or close) a Change Order.

2. Enter the amount of the change order session balance (without having an over or short difference), and then click **OK**. The funds are returned to the source (for example, the safe).

    If there is an over or short difference, the POS client prompts you to select an over or short reason. The over or short difference appears on the Over/Short Detail Report.

Removing Funds (Safe Only)

Selecting this function removes money from a safe session and from tracking. These funds are no longer available for use in ECM.

1. Select the function to remove funds.

2. If multiple safe receptacles are available, highlight the appropriate safe, and then click **OK**.

3. Highlight the type of funds (class) to remove, and then click **OK**.

4. Enter the amount of funds, and then click **OK**. A transaction chit prints on the local printer.

Reconciling a Receptacle Session

You can reconcile (close) the receptacle's tracking session to prevent further activity and mark it as completed. Some receptacles automatically close with the completion of the count. In order to close a receptacle, the session balance must be zero (0).

1. Select the function to close the receptacle.

2. If multiple receptacles (or banks if closing a bank deposit session) are available, highlight the appropriate session, and then click **OK**.

3. Click **Yes** at the prompt to confirm the closure.

Adjusting a Cash Deposit (Bank Deposit Only)

You can adjust the amount of a cash deposit that was placed into a bank deposit session. This accounts for cash deposits where the amount deposited by the workstation operator differs from the amount actually received in the cash deposit. When prompted, you must select an Adjust Deposit Amount Reason to complete the adjustment.

1. Select the function to adjust a cash deposit.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

3. Select a reason code for the adjustment, or click **Cancel** to bypass the reason code, and then click **OK**.

4. Enter the correct cash deposit amount, and then click **OK**.

Adjusting a Reference (Bank Deposit Only)

You can adjust the reference of a bank deposit session that was created. When prompted, you must select an Adjust Deposit Reference Reason to complete the adjustment. You can adjust the last reference entered for a bank deposit session.

1. Select the function to adjust a bank deposit reference.

2. If multiple bank deposits are available, highlight the appropriate session, and then click **OK**.

3. If required, select the reason code, or click **Cancel** to bypass the reason code (if allowed), and then click **OK**.

4. Enter the new reference, and then click **OK**.

Till and User Assignment

You can assign a till to a cash drawer and assign users to a till using several methods:

• Manually

• Using Quick Start

• Using Allow All

You must assign the till to a cash drawer and assign a user to the till in order to perform cash transactions on the till.

Related Topics:

• Assigning a Till to a Cash Drawer

• Assigning a User to a Till

• Unassigning a User From a Till

• Unassigning a Till From a Cash Drawer

Assigning a Till to a Cash Drawer

You must assign a till to a cash drawer before you can assign users to the till.

1. Select the function to assign a till to a cash drawer.

2. If multiple cash drawers are available, highlight the appropriate drawer, and then click **OK**.

3. Select the till, and then click **OK**.

4. If prompted, enter the starting amount, and then click **OK**

5. Click **Yes** at the prompt to confirm. Starting amount funds are transferred from the safe to the till. The cash drawer opens (if connected).

Related Topics:

• Till and User Assignment

Assigning a User to a Till

You can assign one or more users to the till session on the workstation.

1. Select the function to assign a user to a till.

2. Depending on your configuration, select one of the following:

   • Highlight an employee, and then click **Add** to add the employee to the assigned list. Repeat this step if more than one employee can use the till.

   • Click **Add All** to add all employees to the assigned list.

3. Click **Save** to complete the assignments.

4. Click **Yes** at the prompt to confirm.

Related Topics:

• Till and User Assignment

Performing Quick Start

Quick Start allows you to quickly assign a user and till to a cash drawer on the workstation. This operation combines the Assign Till and Assign User operations. You must configure the user with a cash drawer in order to perform Quick Start.

1. Select the function to Quick Start a till.

2. If prompted, highlight the appropriate till, and then click **OK**.

3. If prompted, enter the starting amount, and then click **OK**.

4. Click **Yes** at the prompt to confirm. The application transfers starting amount funds from the safe session to the till session.

Allowing Access to the Till

A manager can allow any user to perform transactions on the till, but only assign workstation operators that actually use the till. Allowing access:

• Opens the till to all workstation operators who can sign on to the workstation to which the till is assigned

• Assigns the workstation operator when performing a transaction that is tracked by ECM

1. Select the function to assign a user to a till.

2. Click **Allow All**.

3. Click **Save**.

4. Click **Yes** to the message indicating that all workstation operators can use the till.

Determining Till Assignment Status with Smart Key

When you implement a smart key, the key determines whether the entire workstation is usable based on the till assignment.

- When a till is unassigned, the application prompts the workstation operator to assign a till to the cash drawer.
- When a till is assigned, the application prompts the workstation operator to sign on to the workstation.

Adjusting the Starting Amount

When opening a till, it contains a starting amount based on the till template. You can adjust the starting amount if greater or fewer funds are required to operate the till for the day. You must adjust the starting amount before adding guest check transactions against the receptacle. When you initially count the till (prior to performing activities), the starting amount might differ from the expected value. The adjusted starting value is used as part of the count.

1. Select the function to adjust the starting amount.
2. If prompted, highlight the appropriate till (the operator might be assigned to more than one), and then click **OK**.

   This step is not applicable to server banks.
3. Enter the new starting amount for the session, and then click **OK**.

Pulling Cash

1. Select the function to pull cash.
2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.
3. Enter the cash pull information, and then click **OK**.
4. Enter the amount to pull, and then click **OK**.
5. (Optional) Enter a reference for the cash pull transaction, and then click **OK**. The configured number of chits prints.

Unassigning a User From a Till

Unassigning a user from the till does not close the till; it prevents the user from performing additional transactions on the till.

1. Select the function to unassign a user from a till.
2. Depending on the configuration, select one of the following:
   - Highlight an employee, and then click **Remove** to remove the employee from the assigned list. Repeat this to unassign more than one employee.
   - Click **Remove All** to remove all assigned employees.
3. Click **Save** to complete the unassignments.

4. Click **Yes** at the prompt to confirm.

Related Topics:

• Till and User Assignment

Unassigning a Till From a Cash Drawer

Use this operation to swap the current till for another during a shift change. Unassigning the till from the cash drawer does not close the till; it restricts the till to a limited number of operations (count, transfer, cash deposit). After unassigning a cash drawer, you can assign the till to a different cash drawer on either the same or a different workstation. You can also take the till to the back of house and reconcile it.

1. Select the function to unassign a till from a cash drawer.

2. Click **Yes** at the prompt to confirm.

Related Topics:

• Till and User Assignment

Reopening a Receptacle Session

You can reopen a closed front of house receptacle session. After reopening, the balance on the session is zero. An authorized user must manually return any funds to the session before posting transaction activity.

1. Select the function to reopen.

2. If multiple receptacles are available, highlight the appropriate session, and then click **OK**.

Viewing Receptacle Status

The Cash Management Status provides summary information for all receptacle sessions and open Change Orders at the location. The Change Order receptacle details are not included in the cash on hand total that is sent to the bank.

1. Select the function to view Cash Management status.

2. On the Cash Management Status page, manually refresh the information on the form and optionally print the current status information to a chit.

3. Highlight the appropriate receptacle type from the list (if more than one receptacle session is open), and then click **OK**.

No Sale Operation

The No Sale operation allows a privileged workstation operator to open the cash drawer outside of a transaction without performing other operations. The workstation operator typically uses this function key to make change for a customer. When configured, the workstation operator must enter a No Sale reason to open the cash drawer.

No Sale operations are recorded for:

• The workstation operator's assigned receptacle

- Reporting purposes

Viewing ECM Alerts and Summary with the Engagement Cloud Service

If the property has configured the Engagement Cloud Service, you can view Enterprise Cash Management (ECM) alerts and summary information for till and server bank receptacle types through Engagement.

1. Open the Engagement site or sign on to Engagement using a tablet device.

2. On the Hub page, click the ECM alert widget or the ECM summary widget. The following table describes the ECM alert and summary widgets.

Table 8-1   ECM Alert and Summary Engagement Widgets

Engagement Widget	Description
ECM Alert	This widget allows you to view ECM alerts based on cash pull thresholds for all receptacle types. The ECM alert widget shows: • Receptacle Name • Alert Type • Alert Level (if applicable) • Variance (threshold value – actual receptacle session amount) The ECM alert widget also indicates when there are no active alerts.
ECM Summary	This widget allows you to view summary information for all active ECM receptacles. The ECM summary widget shows: • Receptacle Name • Number of Open Receptacle Sessions for each Receptacle Type • Current Total The ECM summary widget also indicates: • An active alert for a session (triangle with exclamation point) • An open receptacle session that is offline (two semi-circle arrows with a slash)

Swapping Tablets with the Oracle MICROS Base Station

You can use ECM on the Oracle MICROS Tablet E-Series 11-inch and Oracle MICROS Base Station. The workstation operator can dock and undock multiple E-Series tablets from the Base Station to allow mobile activities. The till session assigned to a cash drawer persists while swapping tablets on a single Base Station.

Offline Cash Management Operations

Most ECM features depend on access to the Cash Management Service on the primary posting workstation. When connectivity to the service is unavailable, some offline capabilities automatically start without intervention to allow limited Cash Management operations. Operations differ between front of house and back of house receptacles.

Back of House Receptacles Offline

When a workstation is offline from the Cash Management Service, workstation operators cannot perform any functions against a safe, bank deposit, or petty cash receptacle. Operators can perform these functions only from the primary posting workstation that runs the Cash Management Service. The POS application must be accessible from the primary posting workstation in order to perform these operations.

Till Offline

When a workstation that supports a cash drawer is offline, you can open a new offline till and assign or unassign users. These workstation operators can perform most Cash Management functions on an offline till session, including:

- Tendering transactions on guest checks
- Pulling cash: Funds are not transferred and a chit represents the cash pull
- Printing reports for the session from the workstation
- Counting the till
- Depositing cash: The application creates an offline bank deposit on the local workstation to accept the cash deposit
- Closing the till

Server Bank Offline

When a server wants to post transactions from a workstation that is offline, you can open a new offline server bank. You can create a new server bank as a server may work on multiple workstations. Oracle Hospitality recommends limiting the number of workstations the server can use while offline. The server can perform most Cash Management operations on an offline session, including:

- Tendering transactions on guest checks
- Pulling cash: Funds are not transferred and a chit represents the cash pull
- Printing reports for the session from the workstation
- Counting the server bank
- Depositing cash: The application creates an offline bank deposit on the local workstation to accept the cash deposit
- Closing the server bank

After the workstation re-connects online and establishes communication with the Cash Management Service on the primary posting workstation, the application synchronizes all offline sessions and activity performed on the offline workstation with the Cash Management Service.

Consolidating Offline Server Banking Sessions

If the server created more than one server banking session during the course of a shift (for example, to perform cash activities on offline workstations), Oracle Hospitality recommends consolidating all offline sessions into a single session. Consolidation reports transaction activity for the unselected sessions into the single master session to maintain a complete audit trail. The application automatically clears sessions that are not consolidated before the next business day, and does not record transaction activity from these sessions. The server should reconcile funds recorded for these sessions as an over or short count on the valid server banking session.

1. Select the function to consolidate multiple server banking sessions.

2. If necessary, on the employee form, select the employee with multiple sessions to consolidate, and then click **OK**.

   This is required only when more than one employee with multiple sessions exists.

3. Highlight the session to retain as the master session, and then click **OK** to consolidate all other sessions into the master session.

Individual Receptacle Types

The following table lists the receptacle types and indicates the operations you can use when working in each receptacle.

Table 8-2   Individual Receptacle Operations

Receptacle Type	Description	Operations Available

Safe	A safe is the primary cash receptacle for all ECM activity and is the source of all initial funds added to the location. ECM allows you to track and report all activity within a safe receptacle session.	• Open
		• Add funds
		• Paid-in
		• Paid-out
		• Count
		• Save count
		• Recall count
		• Adjust count
		• Adjust count sheet
		• Deposit cash
		• Transfer funds
		  – To safe
		  – To server bank
		  – To till
		  – To petty cash
		• Open/submit change order
		• Save change order
		• Recall change order
		• Reconcile (close) change order
		• Remove funds
		• Close

Bank Deposit	A bank deposit allows you to create a unique receptacle to track funds that will be sent to the bank for deposit into an account. ECM allows you to track and report all activity within a bank deposit receptacle session.	• Open
		• Adjust cash deposit
		• Adjust bank deposit reference
		• Transfer funds
		  – To bank deposit
		  – To safe
		  – To server bank
		  – To till
		  – To petty cash
		• Close

Table 8-2   (Cont.) Individual Receptacle Operations

Receptacle Type	Description	Operations Available

Till	A till allows you to create a unique receptacle to track funds that post in the front-of-house, typically behind a counter or bar. ECM allows you to track and report all activity within a till receptacle session.	• Open
		  – Quick Start till
		  – Assign till
		  – Assign user
		  – Allow all
		• Adjust starting amount
		• Pull cash
		• Paid-in
		• Paid-out
		• Count
		• Save count
		• Recall count
		• Adjust count
		• Adjust count sheet
		• Deposit cash
		• Transfer funds
		  – To petty cash
		  – To safe
		  – To server bank
		  – To till
		• Unassign till
		• Unassign user
		• Close
		• Reopen

Server Bank	A server bank allows you to create a unique receptacle to track funds that are posted in the front-of-house, typically behind a counter or bar. ECM allows you to track and report all activity within a server bank receptacle session.	• Open
		  – On transaction
		  – On open
		• Adjust starting amount
		• Pull cash
		• Paid-in
		• Paid-out
		• Count
		• Save count
		• Recall count
		• Adjust count
		• Adjust count sheet
		• Deposit cash
		• Transfer funds
		  – To petty cash
		  – To safe
		  – To server bank
		  – To till
		• Close
		• Reopen

Table 8-2   (Cont.) Individual Receptacle Operations

Receptacle Type	Description	Operations Available

Petty Cash	Petty cash is a cash receptacle that supports manager cash activities. ECM allows you to track and report all activity within a petty cash receptacle session.	• Open
		• Paid-in
		• Paid-out
		• Count
		• Save count
		• Recall count
		• Adjust count
		• Adjust count sheet
		• Deposit cash
		• Transfer funds
		    – To petty cash
		    – To safe
		    – To server bank
		    – To till
		• Close

Property Reports

The workstation property reports contain information about active receptacle sessions and transactions to assist in daily operations management. The following table lists the ECM reports.

Table 8-3   Property Reports

Report	Provides Information About
Safe Report	Active safe sessions for the location.
Server Bank Report	The active server bank session for the workstation operator signed on to the workstation.
Server Banking Report	Active server banking sessions for the location.
Till Report	Active till sessions assigned on the workstation.
Till Banking Report	Active till sessions for the location.
Cash Pull Report	Cash pull transactions posted for the current business date.
Over/Short Detail Report	Over and short conditions recorded for the current business date.
Bank Deposit Report	Active bank deposit sessions for the location.
Petty Cash Report	Active petty cash sessions for the location.
Paid-In/Paid-Out Report	Paid-in and paid-out transactions recorded for the current business date.
Change Order Report	Open Change Order sessions and transactions for the location.

9
Using a Workstation

A workstation is a physical device that allows you to perform point of sale (POS) operations such as adding menu items to an order, recording payments, clocking in and clocking out employees, printing guest checks and customer receipts, and generating reports.

Topics:

- Understanding Online and Offline Communication Modes
- Determining Whether a Workstation is Online or Offline
- Updating Workstations After Configuration Changes
- Reloading and Refreshing the Check and Posting (CAPS) Database

Related Topics:

- Updating Workstations After Configuration Changes
- Reloading and Refreshing the Check and Posting (CAPS) Database

Understanding Online and Offline Communication Modes

A workstation that can communicate with the database to post transactions is online. Conversely, a workstation that cannot communicate with the database is offline. While online, workstations contact the database for a variety of activities, including:

- Beginning a check
- Ending the current service round of a check
- Paying a check
- Running a report
- Performing a function on the Property Management Console (PMC)

When a workstation attempts to perform one of these actions but cannot contact the application server, the workstation enters offline mode. The POS client can only distinguish between online and offline modes, but a workstation that is offline can still communicate with other workstations or services. Therefore, Simphony further categorizes offline mode as yellow mode and red mode. The following table explains the offline modes and describes how workstations handle transaction and timekeeping information when offline.

Table 9-1   Workstation Offline Modes and Transaction Handling

Offline Mode	Description	Transaction and Timekeeping Handling	Reporting Limitations
Yellow Mode	The workstation can communicate with other workstations and services. In this environment, the local Transaction Cache is able to provide reporting and labor information. In the simplest situation, yellow mode refers to a property that has lost contact with the central database or application servers, usually because the wide area network (WAN) is no longer available. In this environment, the workstations and other services within the property can communicate, but no direct communications to the database are available.	The workstation directs transaction information and timekeeping information to the Offline Cache.	When a workstation is offline (yellow mode or red mode) you can only generate offline reports from the workstation. While in offline mode, the offline financial reports do not show data for the following: • Returns • Void Total • Training Total • Checks Carried Over • Checks Begun • Checks Paid • Checks Outstanding • Check Error Corrections • #TBLS $AV • #TRNS $AV • Total Net Sales
Red Mode	The workstation cannot communicate with other workstations or services. In general, a red mode workstation is a workstation without network communication. A workstation can enter red mode intentionally (remote concession stand) or unintentionally (bad network port on a router or hub).	The workstation stores all transaction and timekeeping information in its local DataStore.	

When an offline workstation detects a connection to the database, it attempts to replay transactions to the central database automatically. While replaying transactions, the workstation is still considered offline. A workstation only attempts to return to online mode when the replay queue has no transactions remaining. Depending on the configuration of the workstation, the workstation returns online automatically or prompts you for confirmation to return online.

Determining Whether a Workstation is Online or Offline

Depending on how the workstations in the revenue center are set up, you can use either of these methods to determine whether a workstation is online or offline, and which offline mode is occurring:

• Check the status bar in the lower area of the screen. The following table describes what the Enterprise Connection Status and the Check and Posting Service (CAPS) Connection Status elements in the status bar show when the workstation is online and offline.

Table 9-2   Workstation Communication Mode Indicators in the Workstation Status Bar

If...	Enterprise Connection Status Shows ...	CAPS Connection Status Shows...	Offline Mode
The workstation is online	Online	Online	N/A
The workstation cannot connect to the central database	Offline	Online	Yellow Mode
The workstation does not have network communication	Offline	Offline	Red Mode

• If you are a manager, select the **Launch PMC** function key, and on the General tab, check the status of the Check and Posting Status and Database Sync Status lines. The following table describes what each line shows when the workstation is online and offline.

Table 9-3   Workstation Communication Mode Indicators in the Property Management Console

If...	Database Sync Status Shows...	Check and Posting Status Shows...	Offline Mode
The workstation is online	Online	Online	N/A
The workstation cannot connect to the central database	Offline	Online	Yellow Mode
The workstation does not have network communication	Offline	Offline	Red Mode

Updating Workstations After Configuration Changes

When an administrator makes configuration changes, workstations automatically download the new information based on the EMC's database update frequency settings. If you want to force an immediate update to workstations, you can use the following functions to save time:

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Table 9-4   Workstation Database Actions

Action	Description
Reload	Reloads the workstation database to immediately get the latest information. You cannot reload the database of workstations that are offline.
	The process of reloading downloads the entire database to the workstation. Reloading may take longer to complete due to the large amount of information being sent.
Refresh	Refreshing the database allows workstations to download the latest EMC configuration changes since the workstation's last database update.
Redraw Page Content	Flushes and redraws all pages with any newly added content. The difference between this function and the Reload and Refresh functions is that Redraw Page Content updates the page that the button is on, without you having to log out and log back onto the workstation. Updates occur after you navigate away from the page and then return to it.

You must have the appropriate privileges to use the Reload, Refresh, and Redraw functions.

1. To reload the workstation database, click the **Reload Workstation Database** function key.

2. To set the workstation to start a job in the background to download the configuration changes, click the **Refresh Database** function key.

3. To set the workstation to start a job in the foreground to download the configuration changes, click the **Refresh Database Live** function key. When you are running a database refresh in the foreground, you cannot perform other tasks on the workstation until the update completes.

4. To redraw all pages with any newly added content, click the **Redraw Page Content** function key.

Related Topics:

• [Using a Workstation](#)

Reloading and Refreshing the Check and Posting (CAPS) Database

You can reload and refresh the Check and Posting (CAPS) database. The following table explains the difference between each database action.

Table 9-5   CAPS Database Actions

Action	Description
Reload	Use this method to update the database of CAPS workstations
Refresh	Use this method to start a background job to download any configuration changes from the central database made since the CAPS workstation's last database update.

1. To reload the CAPS database, click the **Reload CAPS** function key.

2. To refresh the CAPS database, click the **Refresh CAPS** function key.

Related Topics:

• Using a Workstation

10
Manager Tasks for Workstation Reports and Procedures

Managers can perform tasks on the workstation, such as:

- Generating workstation reports
- Changing employee settings
- Testing workstation device connections
- Updating database information using Manager Procedures

The manager must have privileges to perform a particular procedure.

Topics:

- Running Workstation Reports
- Changing Employee Settings
- Running Workstation Diagnostics
- Manager Procedures
- Replaying Checks
- Redirecting Orders
- Editing Routing Groups
- Adjusting Menu Item Definitions
- Adjusting Menu Item Availability
- Adjusting the Menu Item Price on a Check
- Creating, Editing, and Assigning Barcodes to Menu Items
- Changing the Serving Period
- Reloading and Refreshing the CAPS Database
- Voiding All Menu Items From a Closed Check
- Reprinting Time Cards
- Changing the Kitchen Theme
- Performing a Manual End of Day (EOD) Settlement
- Enabling and Disabling Sales Recording Modules

Related Topics:

- Running Workstation Reports
- Changing Employee Settings
- Running Workstation Diagnostics

Running Workstation Reports

You need to have the appropriate privileges to run the reports.

1. Open the Reports List on the workstation.

2. Select a report or enter the Report Number, and then press **OK**.

3. Use the report filters to streamline the report, and then press **Run Report**.

4. (Optional) To print the report on the receipt printer, press the **Print** button.

5. Press **Close** to close the Reports dialog box.

Related Topics:

• [Manager Tasks for Workstation Reports and Procedures](#)

Changing Employee Settings

Managers can perform a variety of employee-related tasks using the workstation.

1. To add employees to a new property:

   a. Sign on to a workstation that belongs to the property to which you want to assign employees.

   b. Click the **Launch PMC** function key, and then click **Add Employee**.

   c. Click the # button, enter the ID of the employee that you want to assign to the property, and then click **OK**.

   d. Click **Search**, select the employee, and then click **Add Employee**.

   e. Click **OK** when prompted for confirmation.

2. To change an employee identification (ID) number:

   a. Click the **Launch PMC** function key, and then click **Edit Employee PIN**.

   b. Use the filters to narrow your search, select the relevant employee from the list, and then click **Edit**.

   c. Enter the **Employee PIN** or swipe the employee magnetic card, and then click **OK**.

3. To enroll employee fingerprints:

   a. Click the **Launch PMC** function key, and then click **Edit Employee PIN**.

   b. Use the filters to narrow your search, select the relevant employee from the list, and then click **Enroll Fingerprint**.

      • To scan the same finger, click **Yes** when prompted.

      • To scan three different fingers, click **No** when prompted.

   c. Place the employee's finger on the fingerprint reader and remove it when the scan is complete. The scanner flashes red while scanning and then turns blue when complete. Remove the finger from the scanner after it turns blue.

   d. Repeat Step 3-c two more times until the enrollment process completes.

4. To change employee training status:

    a. Click the **Edit Employee Training Status** function key.

    b. To add employees to Training Mode, select the **Training** check box adjacent to the employee name, and then click **Save**.

    c. To remove employees from Training Mode, deselect the **Training** check box adjacent to the employee name, and then click **Save**.

Related Topics:

• Manager Tasks for Workstation Reports and Procedures

Running Workstation Diagnostics

Workstation diagnostics assist in troubleshooting and testing the workstation's connection to peripheral devices.

1. Click the **Launch PMC** function key.

2. On the **Functions** tab, click **Device Diagnostics**.

3. To test cash drawers:

    a. To check the functionality of the cash drawers, click **Open Cash Drawer 1** and **Open Cash Drawer 2**.

    b. To check the status of the cash drawers, click **Status**.

4. To test the customer display:

    a. Click **Write**. A dialog box shows the number of lines currently on the customer display.

    b. To clear the customer display, click **Clear**.

5. To change the display intensity:

    a. Click **Current Intensity**.

    b. To make the intensity lighter, click **Lighter**.

    c. To make the intensity darker, click **Darker**.

6. To test the scale, place an item on the scale, and then click **Get Scale Weight**.

7. To test the coin dispenser, click **Dispense Change**.

8. To test the barcode scanner:

    a. Click **Log Scanner Data**.

    b. Scan a menu item, and then click **OK**.

    c. Click the **Support** tab, and then view the log files.

9. To test the magnetic stripe reader (MSR):

    a. Click **Log MSR Data**.

    b. Swipe a card through the MSR, and then click **OK**.

    c. Click the **Support** tab, and then view the log files.

10. To change Internet Protocol (IP) printer settings:

    a. Click **IP Printers**.

    b. Select a printer from the list, and then click **Edit**.

    c. (Optional) Enter a new **Device Name**.

    d. (Optional) To have the application dynamically assign IP addresses for the printer, select **Use DHCP**.

    e. (Optional) Enter the new **Device IP Address**, **Device Subnet Mask**, and **Device Default Gateway**.

    f. Click **Update Printer** to save the changes.

11. To trace COM port information:

    a. Click **Start COM Port Trace**, enter the COM port number, and then click **OK**.

    b. To stop the port trace, click**Stop COM Port Trace**, enter the COM port number, and then click **OK**.

    c. To log the trace details, click **Log COM Port Trace**, enter the COM port number, and then click **OK**.

Related Topics:

- Manager Tasks for Workstation Reports and Procedures

Manager Procedures

Managers can perform many activities at the workstation:

- Replaying checks
- Redirecting orders to other order devices
- Editing routing groups
- Adjusting menu item definitions, availability, and prices
- Creating and editing barcodes and assigning them to menu items
- Changing the serving period of a revenue center or workstation
- Reloading and refreshing the Check and Posting (CAPS) database from the Property Management Console (PMC)
- Voiding all menu items from a closed check
- Reprinting time cards

Related Topics:

- Replaying Checks
- Redirecting Orders
- Editing Routing Groups
- Adjusting Menu Item Definitions
- Adjusting Menu Item Availability
- Adjusting the Menu Item Price on a Check
- Creating, Editing, and Assigning Barcodes to Menu Items
- Changing the Serving Period
- Reloading and Refreshing the CAPS Database
- Voiding All Menu Items From a Closed Check

- Reprinting Time Cards
- Changing the Kitchen Theme
- Enabling and Disabling Sales Recording Modules

Replaying Checks

1. Press the **Launch PMC** function key.

2. On the **Functions** tab, press **Replay Checks**.

3. Select one of the following locations:
   - **Workstation**: Replays checks stored in the workstations
   - **Check and Posting Service**: Replays checks stored in the Check and Posting Service (CAPS) workstation
   - **Check and Posting Backup Service**: Replays checks stored in the CAPS backup workstation

4. Select the workstation, the date, and the time period for which you want to replay the checks.

5. To find the current check replay status for the period that you selected in Step 4, press **View Transaction State**.

6. Press **Replay Checks**, and then press **OK** to confirm.

Related Topics:
- Manager Procedures
- Performing a Manual End of Day (EOD) Settlement

Redirecting Orders

1. Press the **Redirect Order Device** function key, or press the **PMC Launch** function key, and then press the **Edit Redirect Order Device** button on the **Functions** tab.

2. Select the revenue center, select an order device from the list, and then press **Edit**.

3. Select the device to which you want to redirect the orders that come to the device you selected in Step 2, and then press **OK**.

Related Topics:
- Manager Procedures
- Performing a Manual End of Day (EOD) Settlement

Editing Routing Groups

1. Press the **Edit Routing Groups** function key, or press the **PMC Launch** function key, and then press the **Edit Routing Groups** button on the **Functions** tab.

2. Select the workstation and the routing group.

3. Select the new order device, and then press **Save**.

Related Topics:

- [Manager Procedures](#)
- [Performing a Manual End of Day (EOD) Settlement](#)

Adjusting Menu Item Definitions

1. Press the **Edit Menu Item** function key.

2. Use the filters to streamline the menu item list, select an item, and then press **Edit**.

3. Make the changes on the **Definition** tab.

4. To edit price details, select the **Price** tab, and then make the changes.

5. Press **Save**, and then press **Done** to return to the Select Menu Item screen.

Related Topics:

- [Manager Procedures](#)
- [Performing a Manual End of Day (EOD) Settlement](#)

Adjusting Menu Item Availability

1. Press the **Menu Item Availability** function key.

2. Use the filters to streamline the menu item list, select an item, and then press **Edit**.

3. If the menu item is not available, select **Out Of Menu Item**.

4. To change the available menu item count, select **Check Menu Item Availability**, and then enter the available count in the **Count Available** field.

5. Press **Save**.

6. Use the buttons with the left and right angle brackets (< >) to move between menu items from within the Edit Menu Item Availability dialog box, and then press **Done**.

7. To remove the availability settings from all menu items in the list, press **Clear Avail of All Items**, and then press **Yes** to confirm.

8. Press **Done** to close and exit the Select Menu Item: Edit Menu Item Availability screen.

Related Topics:

- [Manager Procedures](#)
- [Performing a Manual End of Day (EOD) Settlement](#)

Adjusting the Menu Item Price on a Check

1. Select a menu item from the check detail area, and then press the **Menu Item Price Override** function key.

2. Enter the new price, and then press **OK**.

3. (Optional) Enter reference information, and then press **OK**.

Related Topics:

- [Manager Procedures](#)

• Performing a Manual End of Day (EOD) Settlement

Creating, Editing, and Assigning Barcodes to Menu Items

1. Press the **Edit Barcode** function key, and then select a revenue center.

2. Scan or enter a barcode number, and then press **Find**.

3. To create a new barcode number, press **Yes** when prompted.

4. Press the **Select** button adjacent to the Menu Item field, select a menu item from the list, and then press **Select**. You can use the filters to streamline the list.

5. (Optional) Select a new **Price Number**.

6. (Optional) Enter the **Alternate Price** and the **Alternate Prep Cost**.

7. To change the barcode number, press **Assign Barcode**, scan or enter a new barcode, and then press **OK**.

8. Press **Save**, and then press **Done** to exit the Edit Barcode screen.

Related Topics:

• Manager Procedures

• Performing a Manual End of Day (EOD) Settlement

Changing the Serving Period

You can change the serving period of a revenue center or a workstation.

1. To change the serving period of a revenue center, press the **Change RVC Serving Period** function key, select a serving period, and then press **OK**.

2. To change the serving period of a workstation, press the **Change WS Serving Period** function key, select a serving period, and then press **OK**.

Related Topics:

• Manager Procedures

• Performing a Manual End of Day (EOD) Settlement

Reloading and Refreshing the CAPS Database

1. To reload the Check and Posting (CAPS) database, press the **Launch PMC** function key, press **Reload CAPS Database** on the **Functions** tab, and then press **Yes** to confirm.

2. To refresh the CAPS database, press the **Launch PMC** function key, and then press **Refresh CAPS Database** on the **Functions** tab.

Related Topics:

• Manager Procedures

• Performing a Manual End of Day (EOD) Settlement

Voiding All Menu Items From a Closed Check

1. If you know the check number:

   a. Press the **Void Check** function key, enter the check number, and then press **OK**.

   b. Press **OK** again, and then press **Yes** to confirm.

2. If you do not know the check number:

   a. Press the **Void Check by List** function key, select the check from the list, and then press **OK**.

   b. Press **Yes** to confirm.

   Related Topics:

   • Manager Procedures

   • Performing a Manual End of Day (EOD) Settlement

Reprinting Time Cards

1. Press the **Reprint Time Card** function key.

2. Enter the employee ID of the employee whose time card you want to print, and then press **OK**.

   Related Topics:

   • Manager Procedures

   • Performing a Manual End of Day (EOD) Settlement

Changing the Kitchen Theme

You need to have the appropriate privileges to perform this task.

1. Sign on to a workstation, and then press the **Set Active Kitchen Theme** function key.

2. Select a new kitchen theme from the list, or select **None** to use the default configuration, and then press **OK**.

   Related Topics:

   • Manager Procedures

   • Performing a Manual End of Day (EOD) Settlement

Performing a Manual End of Day (EOD) Settlement

If you are using the Oracle Payment Interface (OPI) and EOD credit card settlement fails, you can a manually perform the settlement through the workstation by clicking the **EOD Settlement** function key.

Related Topics:

• Replaying Checks

- Redirecting Orders
- Editing Routing Groups
- Adjusting Menu Item Definitions
- Adjusting Menu Item Availability
- Adjusting the Menu Item Price on a Check
- Creating, Editing, and Assigning Barcodes to Menu Items
- Changing the Serving Period
- Reloading and Refreshing the CAPS Database
- Voiding All Menu Items From a Closed Check
- Reprinting Time Cards
- Changing the Kitchen Theme
- Enabling and Disabling Sales Recording Modules

Enabling and Disabling Sales Recording Modules

You must have the appropriate privileges to perform this task.

1. Press the **Quebec SRM Control** function key.
2. To disable the SRM, select the SRM connected printers, and then press **OK**.
3. To enable the SRM, select the SRM connected printers that are disabled, and then press **OK**.

Related Topics:

- Manager Procedures
- Performing a Manual End of Day (EOD) Settlement

11
Hosting and Managing the Dining Room

Hosting staff can manage seating capacity, available server staff, guest seating preferences, dining table status, the wait list, and reservation list. When using the Table Management System (TMS), many functions require a long-press. To perform a long-press, right-click on the function or page area, hold down the right mouse click for a second, and then select an option.

Topics:

- Host Command Area
- Host Display
- Host Legend
- Dining Table Status
- Employee Lines
- Section Layout
- Enhanced Dining Table Information
- Table Status and Functions
- Using Gestures
- Selecting a Table
- Creating a Section Layout
- Changing a Section Layout
- Activating a Section Layout
- Deactivating a Section Layout
- Closing a Section Layout
- Deleting a Section Layout
- Changing Server Availability
- Hiding Colors and Table Decorators from a Table
- Viewing the Employee Section Assignment Report
- Managing Guest Seating
- Viewing Estimated Wait Times
- Greeting the Guest
- Seating a Guest from the Wait List
- Seating a Guest Using Quick Seat
- Unseating a Table
- Reservation List
- Showing and Hiding the Reservation List

Host Command Area

In most cases, the administrator creates the hosting page with a designated Host Command Area. The Host Command Area contains many of the hosting staff and manager functions for the table management system (TMS).

Host Display

The Host Area Display option allows you to view the following information:

- • Show Legend
- • Show and Hide Dining Table Status
- • Show and Hide Reservation List
- • Show and Hide Employee Lines
- • Show and Hide Wait List
- • Show and Hide Section Layout
- • Show and Hide Sections
- • Show and Hide Table Decorators
- • Show and Hide Employees

Information that appears dimmed has not been configured for use in the Host Area.

Host Legend

The Legend Area shows information about the following visual features of the Table Management System (TMS).

Table Decorators

The decorators indicate one or more table statuses. A decorator covers all or a portion of the table in the Dining Table Layout screen. You can hide certain decorators by removing the check mark next to the decorator and clicking OK. The table decorators are preset in the application.

Table 11-1   Table Decorators

Decorator	Description
Clean	The table is clean.
Dirty	The table is dirty.
Close	The table is closed.
Reserved	The table is reserved.
Parent	The table is a parent to one or more child tables. This is the primary table when joining tables.
Child	These tables are joined to a parent table.
Seated	Hosting staff recently seated a guest at the table.
Occupied	A guest is occupying the table.
Printed	The server printed the guest check for the guests at the table.
Paid	The guests at the table tendered the guest check.
User Suggested	This is the table that the host or guest requested as part of the reservation or wait request. This decorator appears only when you select a request that is waiting to be seated.
System Suggested	This is the table at which the system suggests the reservation or wait request be seated based on configuration to more efficiently manage dining activities. This decorator appears only when you select a request that is waiting to be seated.
Selected	This decorator indicates that you have selected the table and it is available for an action or update. You can select more than one table. This table decorator cannot be hidden.

Course Decorators

Course decorators show the current dining course for the guests on the table. Updates to the table occur as menu items are saved to the guest check and when a specific event occurs in the Kitchen Display System (KDS) (such as bumping an order).

Employee Colors

A color assigned to the employee appears on the host page to distinguish one employee from another. All TMS features that show the employee use this color as the employee indicator. If no TMS color is defined for the employee's Operator record, white appears to identify the employee.

Section Colors

A section color indicates tables that are assigned to sections.

Service Alerts

Service Alerts can change the Alert color window, based on the length of elapsed time since a server performed an action on the guest check for the table. When an action occurs, the Service Alert resets and the counter starts at zero. The Service Alert also shows the cover count for the table. If multiple guest checks are open on the table, the Service Alert also shows the number of checks and cover count for each check.

Check Alerts

Check Alerts can change the Alert color window, based on the length of elapsed time for the guest check on the table. The Check Alert indicates the length of time (in hours and minutes) the guest has occupied the table and whether the table is expected to be available soon.

Employee Totals

The Employee Totals window appears after you click the **More** button in the Legend. Employee Totals provides information about the current workload and statistics for servers assigned to tables in the revenue center for the current business date. Click **OK** to close the Employee Totals window and return to the Legend.

Dining Table Status

The Dining Table Status dialog shows detailed information about the table and open guest checks on the table. You can manage this dialog on its own page or as a popup in the host view.

The Dining Table Status supports gesture swipes. The arrows indicate that you can swipe through the area through (left, right, up, and down). When you swipe your finger on the screen from left to right the application cycles through information on the guest check. If multiple checks are present on the table, a top and bottom gesture option appears, allowing you to cycle through any of the guest checks on the table.

To show the Dining Table Status dialog, long-press on the Host Command area and select **Show Dining Table Status**.

To hide the Dining Table Status dialog, long-press on the Host Command area and select **Hide Dining Table Status**.

You can view the following information on the Dining Table Status dialog:

* Table Details

    – Current Section Assignment

    – Current User Assignment

    – Table Image with Table Name and Decorators: A set of navigation icons facing left and right appears. To cycle through each table, swipe the icon in the direction it is pointing to advance one table at a time.

    – Current Seating Capacity

    – Associated Child Tables (if parent): When you merge two or more tables and select the parent table, the Dining Table Status dialog shows information about the child table. When you select a child table, the Dining Table Status dialog shows information about the parent table. If a parent table has more than one child table, the first child table is shown followed by an ellipsis (…).

- Check Details

  – Current Check Count: If the table contains multiple checks, a pair of navigation icons facing up and down appear. To cycle through each check, swipe the icon in the direction it is pointing to advance one check at a time.

  – Current Cover Count

  – Financials (per check)

  – Current Course and History (per check): To view the Course History, a set of navigation icons facing left and right appears in the Check Details portion of the Dining Table Status dialog. To cycle from the Financials to the Course History, swipe the icon in either direction to advance.

Employee Lines

After you assign employees to tables and sections, an optional Employee Lines feature shows the table assignments. A line appears from the employee name label to the table.

To show Employee Lines, long-press on the Host Command area and select **Show Employee Lines**.

To hide the Employee Lines, long-press on the Host Command area and select **Hide Employee Lines**.

Section Layout

The Seating Section Layout allows hosting staff to quickly select tables to be used in the revenue center, and assign section and employees. You can manage the Section Layout on its own page or as a popup in the host view.

To show the Section Layout, long-press on the Host Command area and select **Show Section Layout**.

To hide the Section Layout, long-press on the Host Command area and select **Hide Section Layout**.

Related Topics:

- Creating a Section Layout
- Changing a Section Layout
- Activating a Section Layout
- Deactivating a Section Layout
- Closing a Section Layout
- Deleting a Section Layout

Enhanced Dining Table Information

The on-screen table provides a visual indication of the current table and check status and assignment information. The following table information is shown by default.

- Section Colors

- • Table Decorators
- • Employee Colors

Related Topics:

- • Hiding Colors and Table Decorators from a Table

Table Status and Functions

Enhanced tables provide graphical images that represent dining statuses and indicators. The following example table illustrates several of the status and indicator icons that might appear on a seated table.

Figure 11-1   Table Status Example
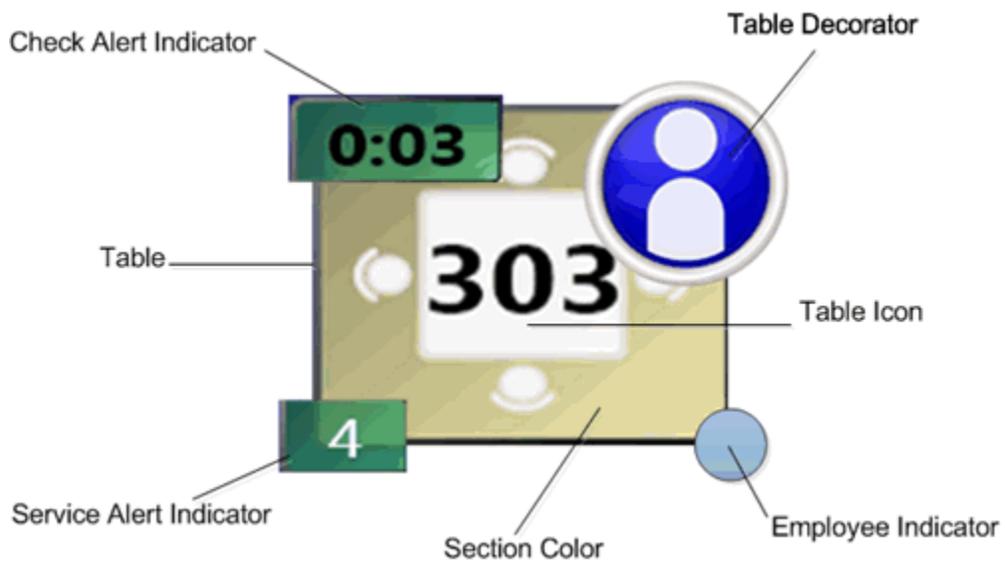
You can change the status of:

- • Open Tables
- • Occupied Tables
- • Closed Tables

Long-press on a table without seated guests to see the functions available on an open table. The following table lists the functions you can perform.

Table 11-2   Open Table Functions

Table Function	Description
Begin Check	Create a new guest check on the selected table. Using the Begin Check function from the table does not include the guest check in Table Management System reporting. Oracle Hospitality recommends that you do not begin a guest check from this function.

Table 11-2   (Cont.) Open Table Functions

Table Function	Description
Assign Section	Assign the table to a different section. The section override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears.
Select Employee	Assign the table to a different server. The employee override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears.
Set as Clean	Indicate that a table is clean and show the Clean table decorator. A clean table is available for seating.
Set as Dirty	Indicate that a table is dirty and show the Dirty table decorator. A dirty table is unavailable for seating.
Close Table	Indicate that a table is closed and show the Closed table decorator. A closed table is unavailable for seating.
Reserve Table	Indicate that a table is reserved for a party arriving in the future and show the Reserved table decorator. A reserved table is not suggested by the system when seating from the Wait List.
Merge Table	Join two or more tables. The application prompts you to select the table to merge into. The tables remain merged until you deactivate the section layout or activate a different layout. Both parent and child tables update the table decorator. The application might prompt you to indicate the number of seats available with the newly merged tables. The cumulative number of seats between all merged tables appears by default.
Change Table Capacity	The application might prompt you to change the seating capacity of a table. The table retains the override capacity until you: • Manually update the table • Deactivate the section layout • Activate a different layout

Long-press on a table with an open guest check to see the functions available on an occupied table. The following table lists the functions you can perform.

Table 11-3   Occupied Table Functions

Table Function	Description
Begin Check	Add a guest check to the selected table. Using the Begin Check function from the table does not include the guest check in Table Management System reporting. Oracle Hospitality recommends that you do not begin a guest check from this function.
Pickup Table (Check#)	Pick up an existing guest check on the table. Ownership of the check transfers to the employee performing the pickup.

Table 11-3 (Cont.) Occupied Table Functions

Table Function	Description
Unseat Table (Check #)	Returns the guest to the Wait List and makes the table available. If a guest check was already on the table, it becomes lost.
Assign Section	Assign the table to a different section. The section override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears.
Select Employee	Assign the table to a different server. The employee override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears. Pre-existing guest checks remain with the original employee.
Set as Clean	Indicate that a table is clean and show the Clean table decorator. A clean table is available for seating.
Set as Dirty	Indicate that a table is dirty and show the Dirty table decorator. A dirty table is unavailable for seating.
Close Table	Indicate that a table is closed and show the Closed table decorator. A closed table is unavailable for seating.
Reserve Table	Indicate that a table is reserved for a party arriving in the future and show the Reserved table decorator. A reserved table is not suggested by the system when seating from the Wait List.
Merge Table	Join two or more tables. The application prompts you to select the table to merge into. The tables remain merged until you deactivate the section layout or activate a different layout. Both parent and child tables update the table decorator. The application might prompt you to indicate the number of seats available with the newly merged tables. The cumulative number of seats between all merged tables appears by default.

Long-press on a closed table to see the functions available. The following table lists the functions you can perform.

Table 11-4 Closed Table Functions

Table Function	Description
Open Table	Indicate that a table is open and remove the Closed table decorator. An open table is available for seating.
Change Table Capacity	The application might prompt you to change the seating capacity of a table. The table retains the override capacity until you: • Manually update the table • Deactivate the section layout • Activate a different layout

Using Gestures

Gestures simulate actions that you can perform with a mouse click on a touchscreen device. The following table lists the gestures you can use in Simphony.

Table 11-5   Gestures

Gesture	Description
Simple Click	The Simple Click touchscreen operation is the standard way of interacting with the POS client. When you click an item on the screen (for example, a Screen Lookup (SLU), menu item, or tender), Simphony responds by activating the object.
Multi Select	The Multi Select touchscreen operation allows you to select several objects at once. For example, when you use the Table Management System (TMS) in Host Mode, you can select multiple dining table objects. After selecting the tables, you can perform a common action, such as Press and Hold or Drag.
Double-click	Use the double-click touchscreen operation with the Reservation and Wait Lists. When you double-click (or double-tap) the Reservation List or Wait List, a dialog appears for you to add a new entry. The Wait List toggles the selection of an item in the list in response to a Simple Click, but does not: • Perform an action to transition away from the screen • Change the application state (other than to toggle the item selection) You can also use double-click with another user interface (UI) element that does not immediately launch a task during a simple click.

Table 11-5   (Cont.) Gestures

Gesture	Description
Press and Hold	Use the Press and Hold touchscreen operation with the following TMS areas: • Wait List • Dining Tables • Host Command Area • Seating Section Layout When you press the touchscreen and release over the same object or list item, Simphony considers this to be a Press and Hold operation if the length of time between the press and the release is more than 1.5 seconds. You can use Press and Hold to show a pop-up dialog with context sensitive operations. For example, the Wait List shows a list of options to Greet Guest, Abandon Request, Hide Summary Area, and Modify Summary Area. The Press and Hold operation allows a large number of buttons to be kept off of the touchscreen, resulting in more screen space for the other UI objects. It also allows a specific command area to act as a launch point for miscellaneous commands that are not directly related to a specific UI element. An example of this is the Host Command area.
Swipe	Use the Swipe touchscreen operation with the Dining Table Status area. When you press the touchscreen and release over the same object with a distance of at least .5 inches, Simphony considers this to be a Swipe operation. The operation most commonly performed is to change to a next or previous item from a list. In the case of the Dining Table Status area, swiping changes to or from the next or previous dining table. If you perform a Swipe gesture too quickly on a touchscreen device, the driver may not be able to detect the movement.
Drag	Use the Drag touchscreen operation with Dining Table objects in TMS to merge one or more tables. Pressing the touchscreen in one area and releasing over a different object is considered to be a Drag operation to Simphony. Dragging a dining table object to another dining table object allows the first object to be added as a child of the second object. You can also Drag various TMS UI areas to different locations on the screen. Using your fingers, press the title area of the TMS UI area and drag it to a different part of the screen. You can move the following TMS items: • Wait List Area • Reservations Area • Section Layout Area • Dining Table Status Area • Host Command Area

Table 11-5   (Cont.) Gestures

Gesture	Description
Edge Scrolling	Use the Edge Scrolling touchscreen operation to scroll through a list of items without a scroll area. This allows more space for other UI elements.
	When you press and hold a location at the top or bottom 10% of a list, the list begins to scroll. The scrolling is slow at first and increases speed the longer you press the auto-scroll area.

Selecting a Table

You can select one or more enhanced tables on the host page by touching a table or using the Select Table option.

1. Touch one or more tables on the host page. If a table decorator is defined for the Selected status, the decorator appears on the table.

2. To use the Select Table option:

    a. Long-press on the Host Command area, and then select **Select Table**.

    b. Select one of the following options:

        • **All Tables**

        • **None** (A quick way to deselect all tables)

        • **By Employee(s)** (Only available with tables assigned to one or more employees)

        • **By Section(s)** (Only available with tables assigned to one or more sections)

Creating a Section Layout

A Seating Section Layout allows hosting staff to quickly select tables in a revenue center and assign them to a section or to employees.

1. Open a Section Layout page, and then click **Create Layout**.

2. From the Create Layouts dialog, select **New Layout**, and then select **Create Layout**.

    If table or section layouts are set at the enterprise level, the layout templates appear in the Create Layouts dialog. You can select an existing template for use in creating the new layout.

3. Enter a name that reflects the purpose of the layout, and then click **OK**. For example, if you are creating a layout to accommodate a service staff of 5 during the breakfast serving period, you might name the layout Breakfast 5.

Related Topics:

• Section Layout

Changing a Section Layout

1. Click the **Load Layout** button.

2. Select the layout you want to change, and then click the **Load** button.

   If you selected a section that was created from a template, table numbers could be assigned to sections within the list. You can alter the table numbers for the layout. If the section was not created from a template, no assignments exist for the section.

3. To assign a table to a section:

   a. Highlight the section.

   b. Touch the table on the workstation screen to add the table number to the section.

   c. Long-press on the section, and then select **Assign Table**.

   d. Select the appropriate Table ID and Table Name to assign. The POS client shows a list of tables that are not associated with a section.

      You can select **Unassign Table** to remove a Table ID and Table Name from the section.

4. To assign an employee to a section:

   a. Long-press on the section, and then select **Assign Employee**.

   b. Select the employee to assign. If the section has an employee assigned, None appears to allow you to unassign the employee from the section.

5. Click the **Save** button.

   The **Save As** button allows you to save a copy of the loaded layout with a different layout name. You can use the **Save As** button to make minor changes from one layout to another rather than re-creating a new layout.

   a. Click the **More...** button.

   b. Select **Save As**.

   c. Enter a name that reflects the purpose of the layout you are saving, and then click **OK**.

   Related Topics:

   • Section Layout

Activating a Section Layout

You can activate a layout to assign employees to sections and tables. Activating a new layout establishes the next employee to open a guest check on a table. Changing the active layout does not change the ownership of open guest checks.

1. Click the **Load Layout** button.

2. Select the layout you want to apply, and then click the **Activate** button. The layout appears as the active table layout.

Related Topics:

- [Section Layout](#)

Deactivating a Section Layout

You can deactivate a layout to quickly clear all section and employee assignments for the tables. Tables with open guest checks appear with the Occupied status. Guest check ownership does not change when deactivating a layout.

1. Click the **More...** button.

2. Select **Deactivate Layout**. Assigned sections and tables disappear.

Related Topics:

- [Section Layout](#)

Closing a Section Layout

Follow these steps to close a layout and return to the active layout:

1. Click the **Close Layout** button.

2. If you made layout changes without saving, the application prompts you to save the changes or cancel without saving.

Related Topics:

- [Section Layout](#)

Deleting a Section Layout

Follow these steps to remove a layout that you no longer need:

1. Click the **More...** button.

2. Select **Delete Layout**.

3. Select the layout you want to remove, and then click **OK**.

Related Topics:

- [Section Layout](#)

Changing Server Availability

This option allows hosting staff to place an employee as unavailable for a duration of time (such as breaks). An unavailable employee is not included in table assignments. Follow these steps to change a server to unavailable for 15 minutes:

1. Long-press on the Host Area, and then select **Server Availability**. The Edit Server Availability dialog appears. This list shows active employees who are assigned to tables in the revenue center.

   If you do not have the Edit Server Availability privilege, the application prompts you for authorization.

2. Select a server from the list.

3. Click the **+** and **–** buttons to change the length of time during which the server will be unavailable, and then click **OK**.

   After 15 minutes (or the amount of time you set) elapses, the application automatically changes the server to available for table assignments. To change an unavailable server to available before the time duration elapses, repeat Steps 1 through 3, clicking the **Available** button (rather than the **+** and **–** buttons).

Hiding Colors and Table Decorators from a Table

1. Long-press on the Host Command area.
2. Select one of the following options:
   - To hide section colors, select **Hide Sections**.
   - To hide employee colors, select **Hide Employees**.
   - To hide decorators, select **Hide Table Decorators**.

Related Topics:

- Enhanced Dining Table Information

Viewing the Employee Section Assignment Report

The Employee Section Assignment Report provides the employee section assignments for a revenue center in the Table Management System (TMS). The report contains the information listed in the following table:

Table 11-6   Employee Section Assignment Report Information

Report Information	Description
Report Name	Employee Section Assignment Report
Property Name	The name of the property in which the report is being run.
User Name	The employee running the report.
Date and Time	The date and time the report was run.
Revenue Center	The name of the revenue center. Only revenue centers that have a section with associated tables appear.
Section	The name of the section. Only sections that have associated tables appear.
Employee	The Check Name of the employee that is assigned to a table associated with the section. If multiple employees are assigned to tables within the section, a new line appears for each employee.
Tables	The table names associated with the section. If multiple tables are assigned to a section, a comma separates each table name. If more tables are assigned to a section than can fit within the available report width, the report wraps the information to the next line without repeating the Table label on additional lines.

Follow these steps to run the Employee Section Assignment Report:

1. Open the Reports List on the workstation.

2. Select the **Employee Section Assignment Report**, or enter the Report Number, and then click **OK**.

3. (Optional) Change the revenue center in the **View** field.

4. Click the **Run Report** button. Results appear in the **Print**, **Display**, and **Stats** tabs of the Reports form.

   If you do not have privileges to run the report, a message appears and the application returns to the Reports list.

5. (Optional) To print the report on the receipt printer, click the **Print** button.

6. Click the **Close** button to close the Reports form.

Managing Guest Seating

All seating requests on the Wait List automatically move up or down in the list depending on the configuration. Oracle Hospitality recommends that you seat requests at the top of the list first, working down the list.

After a guest table request appears on the Wait List (either by adding a wait request or a reservation that moved to the Wait List), and a table is available, hosting staff can seat the guest. You can use one of the following methods:

• Seat the request from the Wait List on a host page

• Perform a Quick Seat

Related Topics:

• Seating a Guest from the Wait List

• Seating a Guest Using Quick Seat

• Unseating a Table

Viewing Estimated Wait Times

The Estimated Wait Times option shows the estimated amount of time remaining until the application anticipates each request being seated.

1. Long-press on the Host Area, and then select **Estimated Wait Times**. The following information appears in the columns:

   • Cover Count: The number of people that the table capacity allows.

   • Estimated Wait Time: The estimated time remaining until a table is available for the cover count.

   • Projected Table: The system suggested table number for the request.

   • Projected Server: When employees are assigned to tables, the probable server name appears.

2. Click **OK** to close the Estimated Wait Times list.

Greeting the Guest

The Greet Guest feature allows hosting staff to greet guests who arrive earlier than anticipated or with reservations on future days. You must have the Greet Wait List Entry privilege to use the Greet Guest feature.

1. Double-tap quickly on either the Reservation List or Wait List to open it.

2. Long-press on the request, and then select **Greet Guest**. If a reservation request is not present on the Wait List, it moves from the Reservation List to the Wait List. When the hosting staff selects Greet Guest, a future reservation appears on the Wait List, but the reservation record does not move to today's date.

Seating a Guest from the Wait List

Follow these steps to seat a guest request from the Wait List on the host page.

1. Double-tap quickly on the Wait List to open it.

2. Select the wait list request.

3. Select the table for the guest.

   A checkmark indicates the system or user suggested table for the party. (Depending on the configuration, the table suggestion icons might be different.) If you attempt to seat a guest at a table that does not meet the system requirements or guest preferences, the application prompts you for authorization if you do not have the appropriate privilege. Depending on the configuration, the application might prevent you from seating a party that is smaller or larger than the selected table can accommodate. For example, when you attempt to seat a cover count of 1 or 6 at a table whose minimum is 2 and maximum is 5, the application prompts you to confirm the cover count upon seating.

4. If prompted, select a server to assign to the guest check.

5. Click **Yes** at the prompt to begin a new guest check. Seat the guest at the table.

   Depending on the configuration, a guest information chit might print after seating the guest from the Wait List. This chit contains information about the table request, such as guest name, VIP status, party size, revenue center, table assignment, table preferences, server name, seating date and time, and special requirements.

   Related Topics:

   • [Managing Guest Seating](#)

Seating a Guest Using Quick Seat

You can rapidly seat a guest using the Quick Seat feature without adding them to the Wait List.

1. Double-tap the table. (Do not highlight or select anything on the Wait List.)

2. Change the Cover Count on the Quick Seat dialog by entering a new number, or using the **+** and **–** buttons, and then clicking **OK**.

   • If you attempt to quick seat a guest with covers below or above the minimum or maximum table capacity, the application prompts you to confirm.

- If you attempt to quick seat a guest at a table that does not meet the system requirements (for example, the table is unavailable or unassigned), the application prompts you for authorization if you do not have the appropriate privilege.

3. Click **Yes** at the prompt to begin a new guest check. Seat the guest at the table.

Related Topics:

- Managing Guest Seating

Unseating a Table

If the guest wants to move to another table after being seated, you can unseat them and re-seat the guest at a different table. You can only unseat a table if the guest has not ordered menu items. After a guest check is open on a table, you cannot use the Unseat Table feature.

Perform a long-press on the table with the seated guest, and then select **Unseat Table**.

- If the guest was previously seated from the Wait List, the guest's name appears on the Wait List.

- If the guest was previously seated using Quick Seat, the guest appears on the Wait List as QS in the guest name column.

Related Topics:

- Managing Guest Seating

Reservation List

The Reservation List contains all reservation requests for the revenue center. Hosting staff with access to the Reservation List can create, edit, and cancel reservation requests from this list. You can manage the Reservation List on its own page or as a popup in the host view.

The Reservation List shows the following information in columns.

Table 11-7   Reservation List Information

Column Name	Description
Confirmation Number	Simphony issues a confirmation number after a workstation operator or guest creates a reservation.
Covers	This column shows the number of guests for the reservation request.
Creation Date	This column shows the date and time that the reservation request was created.
Greeted Date	This column shows the time when the host staff greeted the guest.
Time	The time is always enabled and is the second column shown in the Reservation List. This column shows the time when the reservation is scheduled to be seated.

Table 11-7   (Cont.) Reservation List Information

Column Name	Description
Guest Name	This column shows the name in which the reservation was created.
Phone Number	This column shows the guest's phone number.

Related Topics:

- Showing and Hiding the Reservation List
- Sorting the Reservation and Wait Lists
- Adding a Reservation
- Changing a Reservation
- Cancelling a Reservation
- Setting the Reservation Summary
- Reservation List Icons

Showing and Hiding the Reservation List

1. To view the reservation list, long-press on the Host Command area, and then select **Show Reservation List**.

2. To hide the reservation list, long-press on the Host Command area, and then select **Hide Reservation List**.

Related Topics:

- Reservation List
- Reservation List Icons

Sorting the Reservation and Wait Lists

1. Double-tap quickly on the Reservation List or the Wait List to open it.

2. Click the column headings with up or down arrows to sort the list.

   - When you sort the icon column in ascending order, the VIP records sort in order by Creation Date.

   - Each time you select the **Guest Name** header, the name toggles alphabetically by last name.

   - Each time you select the **Covers** header, the number of guests toggles between ascending and descending.

Related Topics:

- Reservation List
- Reservation List Icons

Related Topics:

- Wait List

- Wait List Icons

Adding a Reservation

1. Open the Reservation List using one of the following methods:

   - Double-tap quickly on the Reservation List.

   - Click the **New Reservation** button (if enabled).

2. (Optional) Click the **Date** button to change the date. The date of the reservation request defaults to the highlighted date before opening the Reservation List.

   On the Reservations calendar, select a different date, and then click **OK**. Click the arrows to move forward and backward between months.

3. Enter information about the guest on the Add Reservation Entry dialog, and then click **OK**.

   You can enter data using either a keyboard or mouse that are physically attached to the workstation in which you are entering the request. Alternately, click the **Keyboard** button on the Add Reservation Entry dialog. The following table describes the fields and buttons.

   Table 11-8   Add Reservation Entry Fields

Field or Button	Description
Name	Enter the First Name, Last Name, or both. The name appears on the reservation request and guest check.
Look Up (optional)	If the property is using a loyalty application, such as Oracle Hospitality Gift and Loyalty Advanced Cloud Service, you can look up and associate a guest's loyalty account with the reservation.
VIP (optional)	Select this option to indicate the guest is a VIP.
Cover Count	Enter the number of guests in the party that require seating.
Phone Number (optional)	Enter the guest phone number to use in contacting the guest if questions arise regarding the reservation.
Requested Table (optional)	If the guest has a specific table request, select the table number. This does not guarantee the table for the guest, but increases the likelihood that the table will be available when the guest arrives for the reservation.
Time	Select the Time button to advance the reservation time using the Hour and Minute + or – buttons.
Availability (optional)	Select Availability to view a list of open reservation times (set by the property manager). Select the time you want to reserve.

Table 11-8   (Cont.) Add Reservation Entry Fields

Field or Button	Description
Email (optional)	Enter the guest's e-mail address to send future promotions from the property.
Notes (optional)	Enter special information for the staff working on the day of the reservation (for example, birthday, anniversary, allergic to shellfish).
Revenue Center	If the property supports reservations across multiple revenue centers (for example, a resort or hotel), a selection list appears. This allows hosting staff in the dining room to make a reservation for the guest in another revenue center at the property.
	If you change the revenue center after selecting Availability, you must re-select the **Availability** button to determine the open reservation times in the new revenue center.
Preferences (optional)	If the guest has a table preference (for example, smoking, patio, booth, or window), click the **Edit** button on the Add Reservation Entry dialog, and select the table preferences.
Referral (optional)	Enter referral sources, such as taxi services, hotel concierge, or advertisements.

4. In some cases where the request values do not match the application's allowable timeframes, the workstation prompts for reservation approval. If you have the **Enable Reservation Approval** permission, click **No** to save the request as unapproved, or click **Yes** to approve the reservation.

   Unapproved reservations appear in the Reservation List. You can approve the reservation, cancel a reservation, or manually control the quickness of seating the request versus other approved requests.

5. After the reservation appears in the Reservation List, the application issues a confirmation number. The confirmation number appears in the summary area at the end of the Reservation List. Highlight the reservation request in the list to view details in the summary area.

Related Topics:

- Reservation List
- Reservation List Icons

Changing a Reservation

1. Double-tap quickly on the Reservation List to open it.

2. Open the reservation request using one of the following methods:

   - Double-tap quickly on the line with the reservation request.

   - Highlight the record, and then click the **Edit Reservations** button.

3. Change the appropriate information, and then click **OK**. The updated reservation request appears on the Reservation List.

   If hosting staff can open and update the Reservation List requests on multiple workstations, the last record to be updated wins and reflects the changes.

Related Topics:

• Reservation List

• Reservation List Icons

Cancelling a Reservation

Ensure that you have the Cancel Reservation Entry privilege.

1. Double-tap quickly on the Reservation List to open it.

2. Long-press on the reservation request, and then select **Cancel Request**.

3. Select a reason code for the reservation cancellation (if prompted).

Related Topics:

• Reservation List

• Reservation List Icons

Setting the Reservation Summary

The summary area must be configured in order to view it in the Front of House.

1. Double-tap quickly on the Reservation List to open it.

2. Highlight a reservation request in the list. The summary area appears beneath the Reservation List and contains the following information about a reservation request.

Table 11-9   Summary Area Options

Summary Option	Shows
Cancel Date	If the reservation request was cancelled, this summary option shows the date and time the request was cancelled or set to a no-show.
Confirmation Number	The confirmation number associated with the reservation request.
Covers	The number of covers associated with the reservation request.
Creation Date	The date and time the request was created.
Greeted Date	The time the request was greeted by a hosting staff member.
Notes	Text that has been included in the notes field of the reservation request.
Phone Number	The phone number associated with the reservation request.

Table 11-9   (Cont.) Summary Area Options

Summary Option	Shows
Referral Notes	Text included in the referral notes field of the reservation request.
Request Method	A description of the request method for the reservation (for example, phone ahead, Internet).
VIP	A VIP flag if the guest has VIP status.

3. To hide the summary area and prevent it from showing, long-press on a reservation request, and then select **Hide Summary Area**.

4. To show the summary area, long-press on a reservation request, and then select **Show Summary**.

5. To modify the summary area, long-press on a reservation request, and then select **Modify Summary Area**.

   a. Select the appropriate summary options in the Select Items column.

   b. To show the summary option on a separate line in the summary area, select the corresponding **Add New Line** check box. The text wraps when you deselect **Add New Line**.

   c. Click **OK**.

Related Topics:

- Reservation List
- Reservation List Icons

Reservation List Icons

The following icons appear on the Reservation List.

Table 11-10   Reservation List Icons

Icon	Icon Name	Description
	Call Guest	Hosting staff paged the guest.
	Phone Reservation	The guest phoned to make the reservation, and hosting staff greeted the guest.
	Phone Reservation (Ungreeted)	The guest phoned to make the reservation, but hosting staff has not greeted the guest.
	Internet Reservation	The guest made the reservation online, and hosting staff greeted the guest.
	Internet Reservation (Ungreeted)	The guest made the reservation online, but hosting staff has not greeted the guest.

Table 11-10   (Cont.) Reservation List Icons

Icon	Icon Name	Description
	VIP	The reservation is for a VIP guest.
	Cancelled	The reservation has been cancelled.
	Unapproved Reservation	The reservation was made without approval.
	Abandoned	The guest abandoned or walked away from the reservation.
	No Show	The guests did not arrive and were not greeted.
	Table Preference	The wait or reservation record contains a request for a specific type of table.

Related Topics:

- [Reservation List](#)
- [Showing and Hiding the Reservation List](#)
- [Sorting the Reservation and Wait Lists](#)
- [Adding a Reservation](#)
- [Changing a Reservation](#)
- [Cancelling a Reservation](#)
- [Setting the Reservation Summary](#)

Wait List

Often a guest arrives and asks for a table. When tables are not immediately available for seating, the guest may request a wait time and add their name to a Wait List. The Wait List contains all wait requests for the revenue center. The Wait List also shows reservations prior to the scheduled arrival. Reservations appear on the Wait List a configured number of minutes prior to the schedule seating time. Hosting staff with access to the Wait List can add, change, and abandon wait requests from this list. Hosting staff can manage the Wait List on its own page or as a popup in the host view.

The Wait List shows the following information in columns.

Table 11-11   Wait List Information

Column Name	Description
Abandoned Time	This columns shows the date and time the guest abandoned the request from the Wait List.

Table 11-11   (Cont.) Wait List Information

Column Name	Description
Alert Icons	The icons indicate status or special considerations about the wait request or reservation.
Confirmation Number	This column shows the confirmation number issued to the reservation request
Covers	This column shows the number of people to be seated for the request.
Creation Date	This column shows the date and time that the request was created.
Greeted Date	This column shows the time when the host staff greeted the guest.
Guest Name	This column shows the name of the guest.
Pager Number	This column shows the pager number assigned to the guest when hosting staff greeted them.
Phone Number	This column shows the guest's phone number.
Request Method	This column shows the source of the reservation request (for example, phone ahead or Internet).
Time	The time is always enabled and shows the time that the guest is scheduled to be seated.
Wait Quote	This column shows the amount of time the hosting staff quoted to the guest upon arrival, or the amount of time a reservation had from the time that hosting staff greeted them to the time they are scheduled to be seated.

Related Topics:

- Showing and Hiding the Wait List
- Sorting the Reservation and Wait Lists
- Adding a Wait List Request
- Changing a Wait List Request
- Abandoning a Wait List Request
- Setting the Wait List Summary
- Wait List Icons

Showing and Hiding the Wait List

1. To view the wait list, long-press on the Host Command area, and then select **Show Wait List**.

2. To hide the wait list, long-press on the Host Command area, and then select **Hide Wait List**.

Related Topics:

- [Wait List](#)

- [Wait List Icons](#)

Adding a Wait List Request

To determine the current wait time for the guest, you need to know the cover count for the party. When you have this information, perform the following steps:

1. Open the Wait List using one of the following methods:

   - Double-tap quickly on the Wait List.

   - Click the **Add Wait List** button.

2. Enter information about the guest on the Add Wait List Entry dialog, and then click **OK**. The following table describes the fields and buttons.

   You can enter data using either a keyboard or mouse that are physically attached to the workstation in which you are entering the request. Alternately, click the **Keyboard** button on the Add Wait List Entry dialog.

Table 11-12   Add Wait List Entry Fields

Field or Button	Description
Cover Count	Enter the number of guests in the party.
Wait Quote	The Wait Quote field automatically updates with the estimated quote time. The estimated quote time is the amount of time before the application expects a table to be available that can accommodate the covers entered. The application automatically calculates wait quotes after you enter the request. Quotes are based on availability, guest preferences (if any), and calculated turn times. You can provide this quote time to the guest. • Click the **Wait Quote** button to override the quote value set by the application. • Select the quote time from the list, or use the **+** and **–** buttons to increase and decrease the wait quote time.
Cancel	If the guest does not want to wait for a table, click the **Cancel** button.
Name	Enter the First Name, Last Name, or both. The name appears on the request and guest check.
Look Up (optional)	If the property is using a loyalty application, (such as Oracle Hospitality Gift and Loyalty Advanced) you can look up and associate a guest's loyalty account with the request.
VIP (optional)	Select this option to indicate the guest is a VIP.

Table 11-12   (Cont.) Add Wait List Entry Fields

Field or Button	Description
Cover Count	Enter the number of guests in the party that require seating.
Phone Number (optional)	Enter the guest phone number to use in contacting the guest if questions arise regarding the request.
Requested Table (optional)	If the guest has a specific table request, select the table number, and then click **OK**. This does not guarantee the table for the guest, but increases the likelihood that the table will be available when the guest is seated.
Email (optional)	If the guest provides an e-mail address, they may receive future promotions from the property.
Notes (optional)	Enter special information for the staff (for example, birthday, anniversary, allergic to shellfish).
Revenue Center	If the property supports reservations across multiple revenue centers (resort or hotel), a selection list appears. This allows hosting staff in the dining room to make a request for the guest in another revenue center at the property. If you change the revenue center after selecting a wait quote, you must re-select the **Wait Quote** button to determine the open seating times in the new revenue center.
Preferences (optional)	If the guest has a table preference (for example, smoking, patio, booth, or window), click the **Edit** button on the Add Wait List Entry dialog, and then select the table preferences.
Referral (optional)	Enter referral sources, such as taxi services, hotel concierge, or advertisements.

After creating a request, a Wait List chit prints (if configured). The chit contains information about the table request (such as guest name, revenue center, party size, greeted time, and estimated wait quote time).

Related Topics:

- Wait List
- Wait List Icons

Changing a Wait List Request

1. Double-tap quickly on the Wait List to open it.

2. Open the request using one of the following methods:

   - Double-tap quickly on the line with the request.

- Highlight the record, and then click the **Edit Wait List** button.

3. Change the appropriate information, and then click **OK**. The updated request appears on the Wait List.

   If hosting staff can open and update the Wait List requests on multiple workstations, the last record to be updated wins and reflects the changes.

Related Topics:

- Wait List
- Wait List Icons

Abandoning a Wait List Request

You must have the Wait List Entry privilege to use the Abandon Request function.

If the guest changes their mind and decides they want to cancel their request before the wait time expires, you can mark the Wait List request as Abandoned. Requests that remain on the Wait List beyond the configured number of minutes are considered abandoned, and the application automatically removes them from the Wait List.

1. Double-tap quickly on the Wait List to open it.

2. Long-press on the request, and then select **Abandon Request**.

3. Select a reason code for the guest's departure (if prompted).

Related Topics:

- Wait List
- Wait List Icons

Setting the Wait List Summary

The summary area must be configured in order to view it in the Front of House.

1. Double-click (or tap) quickly on the Wait List to open it.

2. Highlight a request in the list. The summary area appears beneath the Wait List and contains the following information about a request.

Table 11-13   Summary Area Options

Summary Option	Shows
Abandoned Time	If the guest leaves before being seated, this summary option shows the date and time the request was abandoned.
Confirmation Number	The confirmation number associated with a reservation request.
Covers	The number of people to be seated for the request.
Creation Date	The date and time the request was created.
Estimated Wait Time	The estimated amount of time remaining until the application anticipates the request being seated.

Table 11-13   (Cont.) Summary Area Options

Summary Option	Shows
Greeted Date	The time the request was greeted by a hosting staff member.
Pager Number	The pager number assigned to the guest when hosting staff greeted them.
Phone Number	The guest's phone number.
Referral Notes	Text included in the referral notes field of the request.
Request Method	A description of the request method (for example, phone ahead, Internet).
VIP	A VIP flag if the guest has VIP status.
Wait Quote	The amount of time the hosting staff quoted to the guest upon arrival, or the amount of time a reservation had from the time they were greeted to the time they are scheduled to be seated.

3. To hide the summary area and prevent it from showing, long-press on a request, and then select **Hide Summary Area**.

4. To show the summary area, long-press on a request, and then select **Show Summary**.

5. To modify the summary area, long-press on a request, and then select **Modify Summary Area**.

   a. Select the appropriate summary options in the Select Items column.

   b. To show the summary on a separate line in the summary area, select the corresponding **Add New Line** check box. The text wraps when you deselect **Add New Line**.

   c. Click **OK**.

Related Topics:

- Wait List
- Wait List Icons

Wait List Icons

The following icons appear on the Wait List.

Table 11-14   Wait List Icons

Icon	Icon Name	Description
	Call Guest	Hosting staff paged the guest.
	Phone Reservation	The guest phoned to make the reservation, and hosting staff greeted the guest.

Table 11-14   (Cont.) Wait List Icons

Icon	Icon Name	Description
	Phone Reservation (Ungreeted)	The guest phoned to make the reservation, but hosting staff has not greeted the guest.
	Internet Reservation	The guest made the reservation online, and hosting staff greeted the guest.
	Internet Reservation (Ungreeted)	The guest made the reservation online, but hosting staff has not greeted the guest.
	VIP	The reservation is for a VIP guest.
	Reservations	The reservation was generated from the Reservation List (not from the Wait List).
	Wait Quote Threshold Exceeded	The amount of time the hosting staff quoted to the guest has elapsed. The request is overdue for seating.
	Table Ready	The table is now ready to seat the request.
	Table Preference	The wait or reservation record contains a request for a specific type of table.

Related Topics:

- Wait List
- Showing and Hiding the Wait List
- Sorting the Reservation and Wait Lists
- Adding a Wait List Request
- Changing a Wait List Request
- Abandoning a Wait List Request
- Setting the Wait List Summary

12
Managing POS Operations

Authorized workstation operators can lock and unlock workstations, transactions, and revenue centers from a workstation to avoid sales transactions during critical times. You can perform locking and unlocking operations individually or in groups.

You can prevent transactions in certain revenue centers for limited time periods, such as when running Start of Day (SOD), balancing the PMS and POS, and updating the application.

When a workstation is offline from the Check and Posting Service (CAPS) while submitting a workstation action (lock or unlock), the submitted command is queued and played as soon as possible. The following table lists offline workstation scenarios and describes the action results.

Table 12-1   Workstation Offline Scenarios

Workstation Offline From CAPS	Description of Lock and Unlock Outcome
Workstation from which the lock/unlock action occurs is offline from CAPS	Lock or unlock only the offline workstation
Workstation that is being locked/unlocked (action performed from another workstation) is offline from CAPS	Lock or unlock action occurs after the workstation resumes connection to CAPS

Topics:

- Locking and Unlocking Front of House Operations from the Property
- Updating and Reloading the Workstation Database
- Running Start of Day Manually

Related Topics:

- Locking and Unlocking Front of House Operations from the Property
- Updating and Reloading the Workstation Database
- Running Start of Day Manually

Locking and Unlocking Front of House Operations from the Property

When a workstation, transaction, or revenue center is locked, Autofire Checks continue to process. When a workstation sends a check to an order device using the Autofire function, the totals post to Reporting and Analytics Advanced and to the Check Journal Report.

To lock and unlock a workstation, transaction, or revenue center:

1. Sign on to the workstation.

2. Click the **Workstation Control** function key.

3. Click the workstation action you want to perform, click the workstations to receive the action, and then click **OK**.

Table 12-2   Workstation Locking and Unlocking Actions

Workstation Action	Click This Control To ...
Lock Workstations	Stop operations by workstation. If the workstation that you need to lock is offline from the Check and Posting Service (CAPS), you can physically go to the workstation and lock it.
Lock Transactions	Stop all sales transactions.
Lock Revenue Center	Stop operations within a revenue center.
Unlock Workstations	Restart operations by workstation. If the workstation that you need to unlock is offline from CAPS, you can physically go to the workstation and lock it.
Unlock Transactions	Restart sales transactions.
Unlock Revenue Center	Restart operations within a revenue center.

Related Topics:

• Managing POS Operations

Updating and Reloading the Workstation Database

Updating the workstation database refreshes the data that appears in the workstation. This allows you to obtain the latest business day information from the Enterprise database.

Reloading the workstation database updates the local data stored on a workstation.

1. Sign on to the workstation.

2. Click the **Workstation Control** function key.

3. To update the workstation database, click **Update Workstation Database**.

4. To reload the workstation database, click **Reload Workstation Database**.

Related Topics:

• Managing POS Operations

Running Start of Day Manually

You can run the Start of Day manually from the Enterprise level of the EMC or locally from the workstation.

1. To manually run the Start of Day from the Enterprise level:

   a. From the EMC, select the Enterprise level, click **Tasks**, and then click **Run PC Autosequences**.

   b. Select **Increment Business Day** from the **Choose PC Autosequence** drop-down list, and then click **Run**.

2. To manually run the Start of Day locally on a workstation:

    a. Sign on to the workstation at the appointed time to increment SOD.

    b. Press the **Start of Day** function key.

    c. Press **Yes** at the prompt to confirm.

Related Topics:

- Managing POS Operations

13
Importing and Exporting Data

The Simphony Data Import/Export web application is a user interface (UI) that helps you to create and submit data import and export job requests. Exporting menu items from one system and importing them to another saves time for the administrator or manager. This process allows the menu items to be functional and saleable on the new system's POS client workstations. The web application allows you to:

- Import and export data manually
- Export data automatically using the scheduler
- Review the status of completed import and export jobs
- Access a Help page that provides additional database and application program interface (API) details

Import/Export Prerequisites

- You can export and import menu items with Simphony version 2.8 and later.
- Use a spreadsheet application (for example, Microsoft Excel) that can receive database export and import requests. Data export requests are usually set to output to files that are formatted with comma-separated values (CSV).
- Obtain Simphony EMC logon credentials to access the web application.
- You must have the privilege to access the database and run the Simphony Import/ Export Service.
- Install a Secured Sockets Layer (SSL) certificate to establish a secure connection. See How to trust the IIS Express Self-Signed Certificate for information about installing SSL or digital certificates.

Topics:

- Using the Simphony Data Import/Export Web Application
- Exporting a File
- Creating an Export Schedule
- Generating a File to Export
- Preparing Menu Item Data Files for Import
- Preparing Event Data Files for Import
- Importing Menu Item Files
- Importing Event Files

Related Topics:

- Using the Simphony Data Import/Export Web Application

Using the Simphony Data Import/Export Web Application

You need Simphony EMC logon credentials to access the web application.

1. Open a web browser and enter the following address: `https://[ServerName]/ImportExportApp`.

2. Enter the **Username** and **Password**, and then click **Login**.

3. Select a page. The following table describes the web pages and the actions you can perform on each page.

Table 13-1   Simphony Data Import/Export Web Application Pages

Page	Description
Import/Export	Import or Export data in comma-separated values (CSV) or pipe delimited format.
Status	View a list of import and export jobs that were requested in the past 30 days, along with their status, the requested user, format, object type, and a link to download the data.
Schedules	View a list of import and export jobs that are scheduled to run, including the start date and time, the scheduled days of the month and week.
Help	View additional object details.

Application programming interface (API) documentation is located within the web service:

- https://[servername][:Port Number]/ImportExportApi/DataService.svc/web/Help

- https://[servername][:Port Number]/ImportExportApi/SecurityService.svc/web/Help

The port number is only necessary if the default https port (443) is not used.

Related Topics:

- Importing and Exporting Data

Exporting a File

You can extract information from the Simphony configuration database on demand or you can schedule a recurring export job. The exported data includes menu item or event information. You can then import this information into an inventory management system.

You can export menu item data from Simphony in any order. Export the following menu item database files to successfully import and enable them at a new location:

- Menu Item Masters
- Menu Item Classes
- Menu Item Definitions

- Menu Item Prices

You can export event data from Simphony in any order. Export the following event database files to successfully import and enable them at a new location:

- Event Type
- Event Sub Type
- Event Area
- Event Definition
- Event Definition Detail

Related Topics:

- Creating an Export Schedule
- Generating a File to Export

Creating an Export Schedule

Create a schedule to run an export job on a recurring basis (for example, weekly or monthly). You can create schedules only for exporting files. You cannot create a schedule to import files.

1. Click **Import/Export**.
2. Click **Schedules**.
3. Click **Add Schedule**.
4. In the **Name** field, enter the export schedule name.
5. Select a **Start Date** when the export begins.
6. In the **Time of Day** field, enter the time when the export runs (use 24-hour time in the format hh:mm).
7. Select the frequency of the export schedule:
   - To run the export on a specific day each week, select one or more days of the week. For example, to set the export to occur every Tuesday, select **Tuesday**.
   - To run the export on a specific date each month, enter one or more dates (separated by commas) in the **Dates to Run** field. For example, to set the export to occur on the 3rd and the 15th day of each month, enter **3, 15**.
8. Select **Active**, and then click **Create**.
9. To disable an active schedule from the Schedules page, click the **Disable** link adjacent to the appropriate schedule.

   You can deactivate a schedule, but you cannot delete it. When you deactivate a schedule, export jobs associated with that schedule do not process.

Related Topics:

- Exporting a File
- Generating a File to Export

Generating a File to Export

1. Click **Import/Export**.

2. Select the **Export** option.

3. Enter the **Unit Name**. This is the hierarchy level (for example, Enterprise, property, revenue center, or zone).

4. Select the **Language**.

5. In the **Date Since** field, select the date from which you want to export. For the most recent export, select the current date.

6. Select the **Format** for the export file:

   • **Excel Compatible CSC (ANSI)**: Select this option to edit the file using Excel, Notepad or Notepad++. This option is only available for the English language.

   • **International CSV (UNICODE)**: Select this option to edit the file using Notepad or Notepad++. This option is available for all character sets and languages.

   • **Pipe Delimited (UNICODE)**: Select this option to edit the file using Unicode. This option is available for all character sets and languages.

7. To export the file immediately, ensure that the **Schedule** field shows **Process Immediately**. This is a one-time export request.

8. To schedule the export, select the recurrence and time schedule from the **Schedule** drop-down list.

   If no schedules exist, nothing appears in the **Schedule** drop-down list. See Creating an Export Schedule for more information about schedules.

9. (Optional) Enter the **Request Name**.

   This is a description of the activity (for example, Exporting Menu Items for Property A).

10. Select the type of information to export from the **Object Type** drop-down list.

11. Select the **Data Level**:

    • **Selected Hierarchy**: Select this option to export only the current level of hierarchy. For example, if you created menu items at the property level, selecting this option exports only the menu items created for that property (the export does not include menu items created at the Enterprise level or revenue center).

    • **Selected Hierarchy With Ancestors**: Select this option to export the current level of hierarchy and the higher levels (parent level). For example, if you created menu items at the property level, selecting this option exports menu items created for the property and the Enterprise levels.

    • **Selected Hierarchy With Inherited**: Select this option to export the current level of hierarchy and the lower levels (child levels). For example, if you created menu items at the property level, selecting this option exports menu items created for the property and the revenue center levels.

    • **Selected Hierarchy With Ancestors And Inherited**: Select this option to export all levels of hierarchy (for example, Enterprise, property, and revenue center levels).

The information in the **Mandatory Columns** field automatically appears based on the **Data Level** you selected. The column names appear in the exported file and show the type of data to be exported. You cannot change the values in this field.

12. (Optional) In the **Sort By** field, add a sort option.

13. Click **Submit Request**.

14. Go to the Status page, and then click the appropriate link in the **Download Link** column.

15. (Optional) Change the file as necessary (insert, update, or delete).

16. After the export process completes, save the exported files using a text editor, such as Notepad.

17. When you export a file, the application assigns SimphonyExport.csv as the file name. Rename each exported file to keep them organized before importing the files.

Related Topics:

• Exporting a File

Preparing Menu Item Data Files for Import

Because there are relationships between the databases and menu items, you must import menu item data files in a specific order. Importing menu item data files out of order causes the import job to fail and an inability to add the new menu items on the POS client workstations.

After you export the required menu item data files but before you import the files, ensure that certain values contained in the prospective import files match in specific columns and rows.

1. Open the export file that contains the Menu Item (MI) Masters data, and record the value of the Id column and the corresponding MenuItemName for each menu item to be imported.

2. Open the export file that contains the MI Classes data.

   a. Record the name of each MI Class located in the Name column. Remaining on the same row, scroll to the ObjectNumber column and record the corresponding values there, which are associated with each MI Class name.

   b. Review the prospective MI Classes import data to ensure that all fields are configured in order for the menu items to function as expected.

3. Open the export file that contains the MI Definitions data.

   a. Enter the ObjectNumber values from the MI Classes data file into the MenuItemClass column for each MI Definition.

   b. Enter or verify that the values in the MenuItemMasterId column in the MI Definitions file match the values of the Id column in the MI Masters data file. This holds true for menu items that have multiple definitions.

   c. For items with multiple definitions, ensure that the DefinitionSequence column is numbered in sequential order.

4. Open the export file that contains the MI Prices data.

a. Enter or verify that the values in the MenuItemDefID column in the MI Prices data file match the values of the Id column in the MI Definitions data file. This holds true for menu items that have multiple prices.

b. For items with multiple prices, ensure that the PriceSequence column is numbered in sequential order.

Preparing Event Data Files for Import

Because there are relationships between the databases and event information, you must import event data files in a specific order. Importing event data files out of order causes the import job to fail and an inability to add the new events on the POS client workstations.

After you export the required event data files but before you import the files, ensure that certain values contained in the prospective import files match in specific columns and rows.

1. Open the export file that contains the Event Type data, and then record the value of the Id column for each event type to be imported.

2. Open the export file that contains the Event Sub Type data, and then record the value of the GroupEventType column for each sub event to be imported.

   To link an Event Sub Type to a specific Event Type, verify that the value in the Id column of the Event Type data file matches the value of the GroupEventType column in the Event Sub Type data file.

3. Open the export file that contains the Event Area data, and then record the values of the ObjectNumber column and the HierarchyId column for each event area to be imported.

4. Open the export file that contains the Event Definition data.

   a. Copy the values from the Id columns of the Event Type and the Event Sub Type data files.

   b. Paste the Id values into the GroupEventSubType and the GroupEventType columns in the Event Definition data file.

5. Open the export file that contains the Event Definition Detail data.

   a. Ensure that there is a column for GroupEventArea and a column for RevenueCenterID.

      To link a revenue center and an event area with Event Definition Details, add the following two rows in the Event Definition Details file:

      • Event Area

      • Revenue Center ID

   b. Copy the values from the Id column of the Event Definition data file.

   c. Paste the Id values into the GroupEventDefinition column of the Event Definition Detail data file.

• Importing Event Files

Importing Menu Item Files

The default maximum size of an imported file is 2 MB.

1. Click **Import/Export**.

2. Select the **Import** option.

3. Click **Browse**, and then select the import data file. When you import the menu item data files, do so in the following order:

    a. Menu Item Masters (Select this file first, and then continue with Step 4.)

    b. Menu Item Classes

    c. Menu Item Definitions

    d. Menu Item Prices

4. Enter the **Unit Name**.

    This is the hierarchy level (for example, Enterprise, property, revenue center, or zone).

5. Select the **Language**.

6. In the **Date Since** field, select the date from which you want to import. For the most recent import, select the current date.

7. Select the **Format** for the imported file:

    • **Excel Compatible CSC (ANSI)**: Select this option to edit the file using Excel, Notepad or Notepad++. This option is only available for the English language.

    • **International CSV (UNICODE)**: Select this option to edit the file using Notepad or Notepad++. This option is available for all character sets and languages.

    • **Pipe Delimited (UNICODE)**: Select this option to edit the file using Unicode. This option is available for all character sets and languages.

8. To import the file immediately, ensure that the **Schedule** field shows **Process Immediately**.

9. (Optional) Enter the **Request Name**.

    This is a description of the activity (for example, Importing Menu Items for Property A).

10. Select the type of information to import from the **Object Type** drop-down list.

11. The information in the **Mandatory Columns** and the **Columns** field automatically appears based on the **Data Level** selected with the export job. The column names appear in the imported file and show the type of data to be imported. You cannot change the values in this field.

12. Click **Submit Request**.

13. After the import process completes, save the imported files using a text editor, such as Notepad.

14. Repeat Steps 1 through 13 to import each menu item data file (Menu Item Masters, Menu Item Classes, Menu Item Definitions, Menu Item Prices).

Importing Event Files

The default maximum size of an imported file is 2 MB.

1. Click **Import/Export**.

2. Select the **Import** option.

3. Click **Browse**, and then select the import data file. When you import the export data files, do so in the following order:

   a. Event Type (Select this file first and then continue with Step 4.)

   b. Event Sub Type

   c. Event Area

   d. Event Definition

   e. Event Definition Detail

4. Enter the **Unit Name**.

   This is the hierarchy level (for example, Enterprise, property, revenue center, or zone).

5. Select the **Language**.

6. Select the importable format from the **Format** drop-down list.

   You can select either comma-separated values (**CSV**) or a **Pipe** delimited text file.

7. (Optional) Enter the **Request Name**.

   This is a description of the activity (for example, Importing Events for Property A).

8. Select the type of information to import from the **Object Type** drop-down list.

9. The information in the **Mandatory Columns** and the **Columns** field automatically appears based on the **Data Level** selected with the export job. The column names appear in the imported file and show the type of data to be imported. You cannot change the values in this field.

10. Click **Submit Request**.

11. After the import process completes, save the imported files using a text editor, such as Notepad.

12. Repeat Steps 1 through 11 to import each event data file (Event Type, Event Sub Type, Event Area, Event Definition, Event Definition Detail).

• Preparing Event Data Files for Import

14

Engagement Cloud Service

The Engagement Cloud Service is Simphony's interactive user interface for the Oracle MICROS Tablet E-Series and Workstation 6 Series. The Engagement Cloud Service is a web-based interface featuring an ultra-modern look and feel with interactive live tiles. The Engagement Cloud Service is visually stimulating and provides advanced capabilities that redefine the hospitality and retail experience.

Topics:

Understanding the Engagement Cloud Service

The Engagement experience allows administrators and managers to:

- Create customized pages online
- Assign and tag pages to properties, employees or workstations, or both

Workstation operators can run POS operations and execute Manager Procedures.

There are two types of pages:

- Welcome Pages: Initial page that appears on the MICROS Tablet E-Series device.
- Hub Pages: Pages that appear on the tablet after you sign on and press the **Hub** button.

Pages can contain widgets that enhance workstation functionality. For example, you can view daily specials, image slideshows, a Twitter feed, and Oracle Hospitality Reporting and Analytics reports on the tablet's touchscreen.

Understanding the Engagement Auditing Tool

You can track a variety of operations using the Engagement configurator. The auditing tool tracks and provides the date and time, user ID, user name, actions that were performed, and additional details about each operation.

The Engagement auditing tool provides information about the operations listed in the following table:

Table 14-1   Engagement Auditing Tool Tracking Information

Operation Category	Operation
Administrative (User)	• Successful and failed logins • Log outs from the configurator • Synchronizations performed
Tag	• Adding and deleting a tag name • Adding and deleting a tag name to pages
Page	• Creating, deleting, and cloning a page • Changing the theme of a page • Assigning, removing, and cropping a logo on a page
Widget	• Adding and removing a widget on a page • Saving a widget's template name • Changing the size of a widget (both previous and new sizes) • Changing the widget name (both previous and new names) • Uploading, removing, and cropping a widget background image
Workstation	Adding and removing a tag name for Engagement workstations
Employee	Adding and removing a tag name for Engagement privileged employees

Related Topics:

• Using the Engagement Auditing Tool

Using the Engagement Auditing Tool

1. Click the **Menu** bar, and then click **Audit**.

2. Filter your search by selecting a **Category** or **Date Range**, or enter a keyword in the **Search** text box.

3. Click **Filter**.

Related Topics:

• Understanding the Engagement Auditing Tool

15
Events

An event is a group of transactions that occur within a specific date and time range in one or more revenue centers at a property. Examples of events include sporting events and games, banquets, weddings, and receptions. A property can track sales and inventory, particularly when multiple events occur in a single business day (for example, a baseball double header).

Topics:

- Understanding the Event Status Bar
- Starting and Ending an Event
- Posting Checks to an Open Event
- Posting Checks to a Closed Event
- Workstation Reports

Related Topics:

- Starting and Ending an Event
- Posting Checks to an Open Event
- Posting Checks to a Closed Event
- Workstation Reports

Understanding the Event Status Bar

The event status bar allows you to view the event name for posting check sales. The event status bar is typically configured to appear on the top or bottom of the POS client page.

Depending on the status bar configuration, you can see some or all of the following information in the event status bar for the workstation operator and the current check detail:

- Event name
- Event short code
- Actual start date and time of the event
- End date and time (If the event is set to automatically end, the end time appears with an asterisk, such as 25/06/2016 11:00pm*.)

Depending on the status bar configuration, you can view the information while signing on or off of a workstation, and in a transaction.

Related Topics:

- Starting and Ending an Event
- Posting Checks to an Open Event
- Posting Checks to a Closed Event

- Workstation Reports

Starting and Ending an Event

You must have the privileges to manually start and end an event.

Events that are configured to automatically start or end will do so automatically at the preset date and time. No manual intervention is needed.

When a workstation is offline and has no connection to the Check and Posting Service (CAPS), events cannot start or end (automatically and manually).

1. Sign on to the workstation.
2. To manually start an event:
   a. Click the function key to select an event.
   b. Select the event to start, and then click **OK**.
3. To manually end an event:
   a. Click the function key to end an event.
   b. Select the event to close, and then click **OK**.
   c. Click **Yes** to confirm.
   d. If the event has open checks, click **Yes** to close the event with open checks remaining, or click **No** to cancel the closing, pick up the open checks, and then close them.

   A check can be associated with only one event. When you close an event with open checks, and then close the checks later, these checks post to the event they were associated with when opened.

   Linked events are closed at the configured time, with or without open checks.

Related Topics:

- Events
- Understanding the Event Status Bar
- Workstation Reports

Posting Checks to an Open Event

1. Select the function key to begin a check or fast transaction.
2. If multiple events are active (started) in the revenue center, select the event, and then click **OK**.

   When events are not set as mandatory, the POS client does not prompt you to select an event.
3. If prompted, enter the table number, and then click **OK**.
4. If multiple event areas are active for the event, select the area, and then click **OK**.
5. Add menu items, and then tender the check using the guest's payment method.

Related Topics:

- Events

- Understanding the Event Status Bar
- Workstation Reports

Posting Checks to a Closed Event

You can add a check to an event that is closed. For example, when you end a wedding event at the workstation, and then a wedding guest orders a last minute drink, you can post that check to the closed wedding event.

You must have the privilege to associate a check with an event that has ended.

1. Select the function key to begin a check or fast transaction. The Select Check Event list appears and includes closed events for the past seven days (including today).

    Closed events appear in the list preceded by an asterisk (*).

2. If the event does not appear in the Select Check Event list (because it occurred more than seven days ago), select **Change date to show ended Events**, and then click **OK**.

    You can view closed events for up to 60 days in the past (including today).

3. Select the date from the calendar, and then click **OK**. All closed events from the selected date to the current date appear.

4. Select the closed event, and then click **OK**.

5. Add menu items, and then tender the check using the guest's payment method.

Related Topics:

- Events
- Understanding the Event Status Bar
- Workstation Reports

Workstation Reports

The workstation property reports contain information about events. The following table lists the reports that contain event-related information.

Table 15-1   Event Property Reports

Report	Description
Property Financial Event Report	Shows events for each property for the period that you select, including total event and non-event sales, and outstanding (open) checks associated with events.
Property Financial Event VAT Report	Shows Property Financial Event information, with the addition of value-added tax (VAT) detail.
Employee Financial Event Report	Shows events for the period and employee that you select, including total event and non-event sales.

Table 15-1   (Cont.) Event Property Reports

Report	Description
Employee Financial Event VAT Report	Shows Employee Financial Event information, with the addition of value-added tax (VAT) detail.
Event Financial Report	Shows the event and period that you select, including total event and non-event sales.
Event Financial VAT Report	Shows Event Financial information, with the addition of value-added tax (VAT) detail.
Menu Item Sales Event Report	Shows menu items ordered during the period and event you select, including total event and non-event sales.
Employee Journal Report	Provides a journal of all sales transactions by a specific employee shown in a check detail layout. The information appears by revenue center and then by event.
Check Journal Report	Provides a journal of all sales transactions in a check detail layout. The information appears by revenue center and then by event.
Employee Open Check Report	Provides a list of all open checks belonging to an employee at the time the report is taken. Checks are grouped in the following order: employee, property or revenue center, and event. Event details appear in the check information.
Employee Closed Check Report	Provides a list of all checks that have been closed by an employee, including reopened checks that were closed again and checks closed as memo checks. In addition, special symbols on the report indicate whether the check was transferred, re-opened, split, or added. Checks are grouped in the following order: employee, property or revenue center, and event. Event details appear in the check information.
Offline Employee Open Check Report	Provides a list of all open checks belonging to an employee at the time the report is taken. Checks are grouped in the following order: employee, revenue center, and event. Event details appear in the check information. Unlike the online version of this report, the offline version functions only for a revenue center; it is not possible to take a report for the property.
Employee Autofire Open Check Report	Provides a list of all checks that are scheduled for autofire at the time the report is run. Checks are grouped by employee, property or revenue center, and event, and sorted by scheduled date and time. Event details appear in the check information.

Related Topics:

- Events
- Understanding the Event Status Bar
- Starting and Ending an Event
- Posting Checks to an Open Event
- Posting Checks to a Closed Event

16
Order Information Service

Topics:

- Understanding the Order Information Service
- Assigning Checks to a Delivery Agent
- Closing a Check After Delivery or Pickup
- Closing All Open Checks

Related Topics:
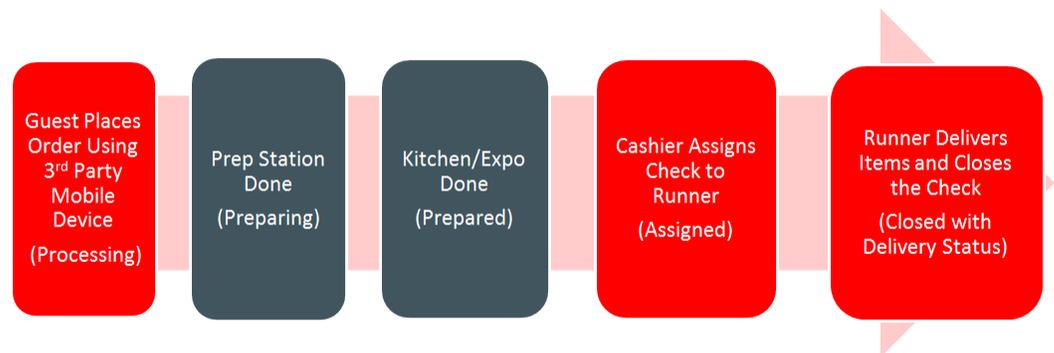
- Assigning Checks to a Delivery Agent
- Closing a Check After Delivery or Pickup
- Closing All Open Checks

Understanding the Order Information Service

The Order Information Service allows third-party solutions to offer mobile ordering for delivery and pickup (for example, in seat ordering at a stadium) with status updates to the guest. Guests may pick up their order or request delivery. Updates to the order status notify the guest when orders are ready for pickup or in transit for delivery. The Order Information Service includes the latest view of the order content, such as order ID, items purchased, payment, employee delivering the order, and so on.

The following diagram illustrates the order flow using the Order Information Service:

Figure 16-1   Order Information Service Workflow

Related Topics:

- Assigning Checks to a Delivery Agent
- Closing a Check After Delivery or Pickup
- Closing All Open Checks

Assigning Checks to a Delivery Agent

You can assign one or more checks to a delivery agent (also called a runner). This function transfers the check to the delivery agent.

1. To assign one or multiple checks, click the appropriate button:
   - **Assign Check**
   - **Assign Multiple Checks**

2. Enter the runner's employee ID number or swipe the employee card, and then click **OK**.

3. Enter the check number, and then click **OK**.

   When assigning multiple checks, the POS client prompts you to enter the next check number, and so on. Click **Cancel** when you are finished entering check numbers.

4. Click the **Get Check Detail** button.

5. Click the **Send Request** button. The check changes to the Assigned status.

6. Repeat Step 5 for each check number.

Related Topics:
- Order Information Service
- Understanding the Order Information Service

Closing a Check After Delivery or Pickup

You can close a check and indicate the delivery status. The status applies to items that are delivered to the guest, as well as items that the guest picks up.

1. Pick up the check you want to close.

2. Click the button configured for one of the following scenarios:
   - **Delivered**: All items were delivered successfully and payment was applied.
   - **Delivery Failed**: The delivery agent cannot find the guest to deliver the prepared items. All items are voided and returned to inventory.
   - **Delivered Without Alcohol**: The alcohol items are voided and returned to inventory.
   - **Cancelled**: The order is canceled prior to being prepared and delivered. All items are voided and the check is closed to a zero dollar amount.

Related Topics:
- Order Information Service
- Understanding the Order Information Service

Closing All Open Checks

You can close all open checks of a given order type or employee.

1. Pick up the check or checks you want to close.

2. Click the button configured for one of the following scenarios, and then click **Yes** to confirm:

   • **Close All Open Checks**: Voids all items on every check that is open and closes the checks to a zero dollar amount.

   • **Close All Open Checks by Order Type**: Voids all items on every check created by the Order Type that is open (for example, Dine In or Take Out) and closes the checks to a zero dollar amount.

   • **Close All Open Checks by Employee**: Voids all items on every check created by the employee ID that is open and closes the checks to a zero dollar amount.

Related Topics:

• Order Information Service

• Understanding the Order Information Service