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Preface

Oracle MICROS 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 Configuration Guide provides instructions for system administrators to set up Simphony.

Audience

This document is intended for system administrators of Oracle MICROS Simphony.

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 and any associated log files
- Screen shots of each step you take

Documentation

Product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/food-beverage/pos.html.

Simphony Digital Learning

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 Oracle Food & Beverage Learning Subscription.

Revision History

Date	Description of Change
September 2022	Initial publication for Simphony release 19.4.

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November 2022	Updated the following topics in the Taxes chapter: • Serving Periods • Configuring a Serving Period Updated the following topics in the Configuring Pre-Production Chits to Output to Remote Printers chapter: • Configuring Pre-Production Chits to Output to Remote Printers • Example of a Pre-Production Chit Removed the Configuring the Biometrics CAL Package Deployment topic from the Peripheral Devices chapter. Updated the following topics in the Transaction Services chapter: • Transaction Services • Configuring the Transaction Services Workstation Client Updated Adding an Employee in the Employees and Privileges chapter Added or updated the following topics for Simphony release 19.4.1: • Configuring the OPERA Self Pay Button • Suppressing Condiment Groups on a Condiment Orderer Page (new topic) • Configuring the Cash Tender • Configuring Closed Check Settings • Configuring a Cash Drawer
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January 2023	Added Enabling the Unused Credit Card Authorization Release Alert to the Payments and Currency chapter (SPI section). Updated the POS Clients Running Android Mobile Operating System section in the POS Workstations chapter.
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April 2023	Updated Adding an Employee in the Employees and Privileges chapter. Updated XProcessor Extension Application Migration in the Loyalty and Gift Card Interfaces and Drivers chapter.
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Date	Description of Change
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July 2023	Added Configuring EMC Display Scale Settings for Microsoft Windows Devices to the Introduction to Simphony chapter.
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September 2023	Added Configuring Zero-Payment Transactions to the Guest Checks chapter. Updated Activating the Extension Application for Order Information Service in the Transaction Services chapter. Updated CAPS Optimization for High Loads in the Check and Posting Service (CAPS) chapter.
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June 2025	Added cerificate details to topic Location-Based API Requirements for Simphony Transaction Services Gen 2.

1

Introduction to Simphony

Oracle Hospitality Simphony is an Enterprise-class Point-of-Sale (POS) software product. Simphony can be hosted in the Oracle Cloud Hosting Center, self hosted at multiple properties or at a customer's data center. Simphony can support multiple or single property configurations.

Administrators can configure Simphony using the Enterprise Management Console (EMC) tool. This application allows you to set up the Enterprise, properties, revenue centers, and zones from a PC that has access to the central server.

Simphony interacts with the following devices and solutions:

- Peripheral Devices, such as cash drawers, magnetic stripe readers, and barcode readers
- Printers and Order Devices, such as a Kitchen Display System (KDS)
- Credit Card Drivers
- Loyalty and Gift Card Interfaces and Drivers
- Oracle Hospitality Reporting and Analytics
- Oracle Hospitality OPERA 5 Hotel Property Systems

EMC Basics

This section describes the basic functions in EMC. For information about accessing the EMC after a fresh installation or upgrade, see the *Oracle Hospitality Simphony Post-Installation or Upgrade Guide*, specifically the *EMC Access Security* chapter.

EMC Configuration Hierarchy

The Simphony EMC has three areas that allow you to choose where to define certain definitions and records in the EMC's hierarchy tree. In EMC, modules are configured (in order from highest to lowest) on the enterprise, property, or revenue center levels. See Enterprise for more information on EMC levels.

An employee's assigned role determines whether users have full or partial access to specific modules on certain levels. See Employees and Privileges for more information on employee roles

EMC Home Page

When you log in, EMC defaults to the Home Page. The Home Page shows a navigation tree in the Locations pane based on the EMC levels. Modules appear to the right of the Locations pane and filters based on the location you select from the navigation tree.

You can use the filters below the Locations pane to easily search for properties, revenue centers, and zones within a large enterprise.

Figure 1-1 EMC Home Page Filters



- **Filter**: Enter the name of a property, revenue center or zone to filter the navigation tree.
- **Coll**: Click to collapse the navigation tree. If the navigation tree is collapsed when filtering, the search returns the top most level. For example, when you search for a revenue center, the navigation tree shows the property to which it belongs.
- **Exp**: Click to expand the navigation tree.
- **Show all zones**: Select to shows zones in the navigation tree and to include zones in your search.
- **#**: Select to show the object number in front of properties, revenue centers, and zones in the navigation tree.

EMC remembers each users state at the time of exit. Therefore, the next time you log in, the EMC Home Page defaults to the location that was last viewed by you when EMC was closed.

Table View and Form View

Table view and form view are two views used to show information within modules.

Most modules open to table view, which is a grid view showing all records sorted by object number. Typically, the first two columns are the object number and name of the record. Table view is generally used when making bulk changes. When a record is changed, table view highlights the record in yellow.

Form view shows the same content that is available in table view, but for a single record. Depending on the data, sometimes form view shows more information than table view. For example, the Employee Roles module, which contains only object number and name in table view, contains several configurable tabs in form view. Form view includes a navigation bar that shows the object number and name of each record available, making record-to-record navigation easier. To navigate to a specific record, simply select the record within the navigation bar and the corresponding form view tabs populate with the selected record's information.

Three methods are available for switching between table view and form view:

- Click the **Toggle Table/Form View** icon on the EMC toolbar.
- While in table view, double-click the Object Number column to open form view.
- While in form view, double-click the object number/name in the navigation bar to open table view.

While configuring Simphony (in either table or form view), certain files have **Go To Previous** navigational buttons. This icon



, links you to the location in this current file (or a different file) where the selected information is stored. You may want to use this option to change an entry, add an entry, or just view its programmed characteristics.

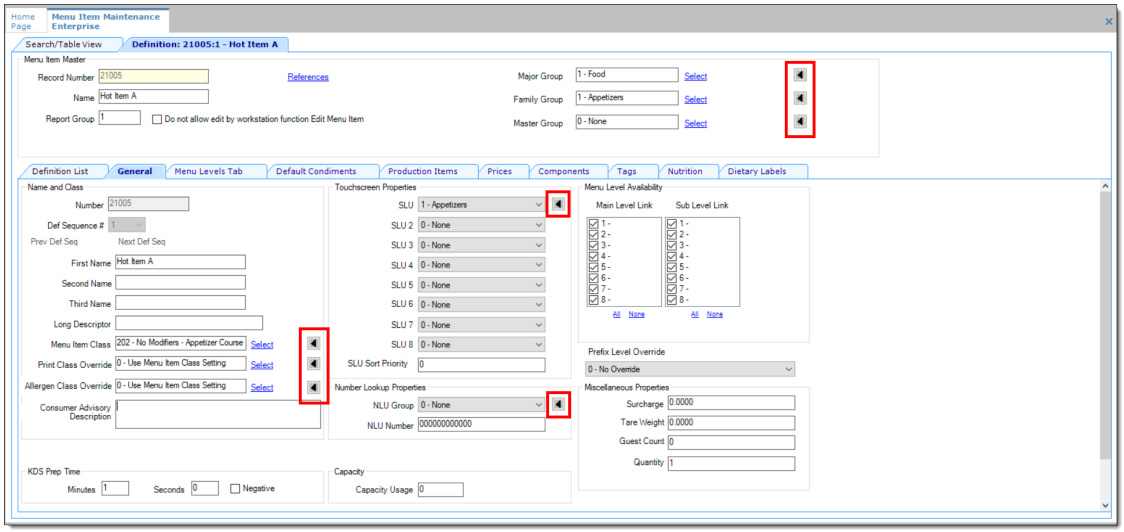
Example: You are adding a group of menu items and you do not see the Screen Look Up (SLU) group you want to assign them to.

1. Click the

   icon next to the **SLU** field. This opens the **Menu Item** file, which can be found under the SLU Names section from the **Descriptors** tab.
2. From here you can view the existing groups or add new a SLU group name. Click **Save** if you make any changes.
3. Navigate back to the MI Definition file and select the new (or differing) SLU group to the menu item from the SLU field's drop-down list.

Figure 1-2 EMC Go To Previous Navigational Links



Module Record Filters

By default, most modules in EMC show all of the available records when opened. You can remove unwanted records from view using the filters available in table view. The filters appear above the table and is set to Show All Records.

Figure 1-3 EMC Filter Section in Table View



When records are filtered,

- Form view shows only the records that appear in table view. While in form view, the navigation buttons (next, previous, first, and last) change to only the records that appear in table view.
- The Option Bit Comparison Dialog shows only the records that appear in table view.

The Menu Item Maintenance module provides additional filters for streamlining the records. See Searching and Filtering Menu Items for more information.

Sorting Records

In EMC, you can sort records presented in tables by one of the columns. By default, records are sorted by object number. To sort by another column, click the column header.

EMC Toolbar

EMC uses common controls that are familiar to most users. For example, the top of the screen includes a menu bar with the standard File, Edit, and View options. Additionally, a number of navigational icons are available on the toolbar.

The following table describes the icons on the EMC toolbar. You can also access the functions performed by these icons within the menu bar.

Table 1-1 EMC Toolbar Icons

Toolbar Icon	Name	Function	Available in Table View?	Available in Form View?
	Refresh	Performs a refresh of the data in the current module.	Yes	Yes
	Close	Closes the currently active module.	Yes	Yes
	Close All	Closes all open modules.	Yes	Yes
	Location Selector	Opens the current module in another property or revenue center. This icon is enabled only if you open a module from the property or revenue center level.	Yes	Yes
	Language Translation	Opens the EMC Record Translation dialog. This icon is enabled only when the current GUI control is a translatable text field.	Yes	Yes
	Print	Opens a dialog that allows you to print records from table view.	Yes	No
	Save	Saves changes to records in the currently active module. This icon is enabled only when changes have are made to the current module. When you insert a new record to a module, Simphony automatically saves that record. To invoke this icon, you must make initial entries or modify an existing record entry.	Yes	Yes
	Save All	Saves changes to records in all open modules. This icon is enabled only when any open module has its records change.	Yes	Yes

Table 1-1 (Cont.) EMC Toolbar Icons

Toolbar Icon	Name	Function	Available in Table View?	Available in Form View?
	Insert	Adds a new record to the module. This icon is enabled only when the current module supports the Insert functionality and only when the logged-in user has Employee Role permissions to add new records to the module.	Yes	Yes
	Delete	Deletes records. This icon is enabled only when the current module supports the Delete functionality, and only when the logged-in user has Employee Role permissions to delete records from the module.	Yes	Yes
	Distribute	Distributes records. This icon is enabled only when the EMC user is associated with an Enterprise Role with the option **Distribute** enabled, and only when the current module supports distribution.	Yes	Yes
	Copy Record(s)	Copies records while in table view.	Yes	No
	Undo/Redo	Performs the undo/reload function. You cannot undo the addition or deletion of a record. EMC uses a record-level undo, where all changes to a single record are undone. You cannot undo a previous change because the flow and layout of EMC make this an impractical option. The standard Ctrl+Z functionality does exist to undo changes to a text field. In Employee Maintenance and Menu Item Maintenance, undo is available through the right-click menu only.	Yes	Yes
	Paste Record(s)	Pastes records while in table view.	Yes	No
	Toggle Table/ Form View	Switches the current module between table view and form view.	Yes	Yes
	First Record	Navigates to the first record in the module.	No	Yes
	Previous Record	Navigates to the previous visible record in the module.	No	Yes
	Next Record	Navigate to the next record.	No	Yes
	Last Record	Navigates to the last record in the module.	No	Yes
	Go To	Opens a dialog that allows you to type an object number and navigate to the specified record.	Yes	Yes

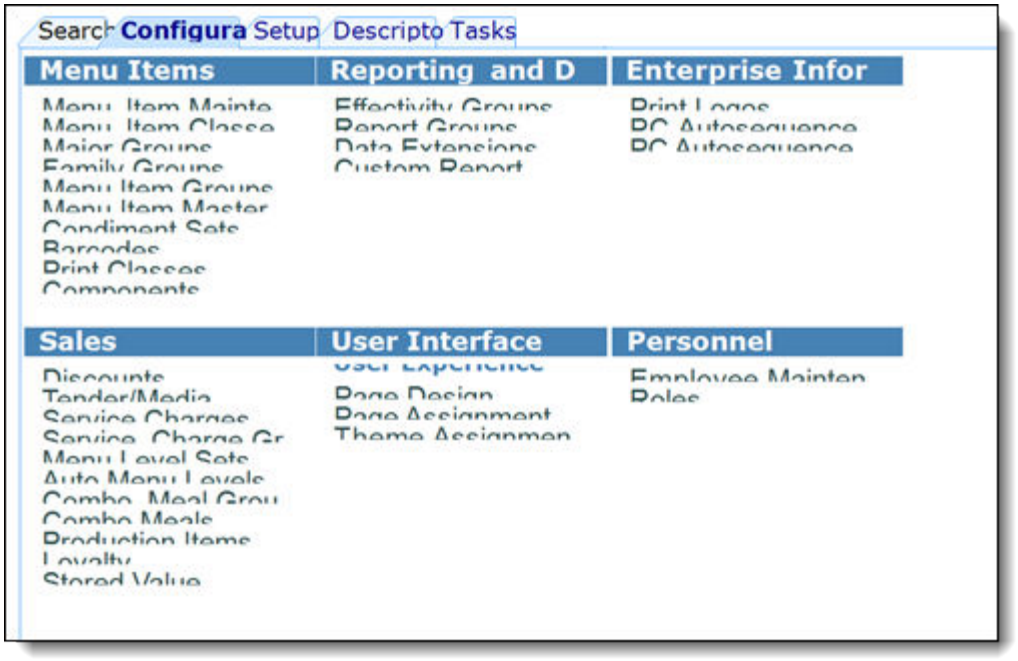
Table 1-1 (Cont.) EMC Toolbar Icons

Toolbar Icon	Name	Function	Available in Table View?	Available in Form View?
	Find	Opens a dialog that allow you to find a record based on text comparison in any column.	Yes	No
	Go To Previous	In some modules, go to links are provided to quickly open other modules. For example, the Job Codes module includes a go to link to open the Employee Classes module. After clicking a go to link, this icon is enabled. When clicked, it closes the module that you were navigated to (for example, Employee Classes) and returns you to the module from which the link was pressed (for example, Job Code).	N/A	N/A
	Navigation Bar	Switches the visibility of the navigation bar in form view.	No	Yes

Configuring EMC Display Scale Settings for Microsoft Windows Devices

When using an Enterprise Management Console (EMC) on Microsoft Windows devices, you may come across perceived defects in the application's user interface (UI) when viewing particular modules or fields. This may include aspects of the pages being skewed, overlapping or truncated text, font sizes within forms varying in size, to the point where the status of checkboxes being enabled (or not) is unclear. To resolve such EMC UI display issues, Oracle MICROS Food and Beverage recommends configuring the display scale settings of your computer. This possible solution applies to either locally accessed or remote EMC's.

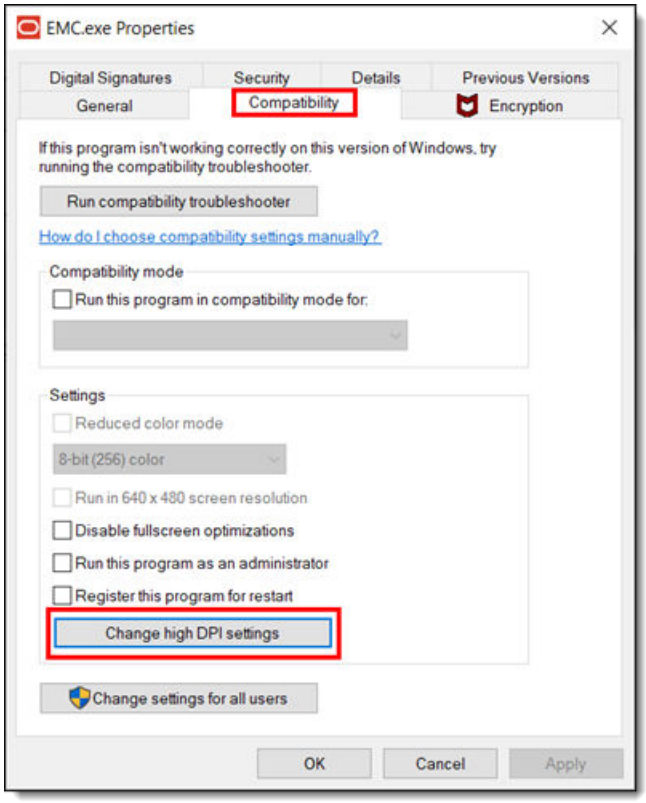
Figure 1-4 Example of Possible EMC UI Display Issues



To modify your display scaling settings:

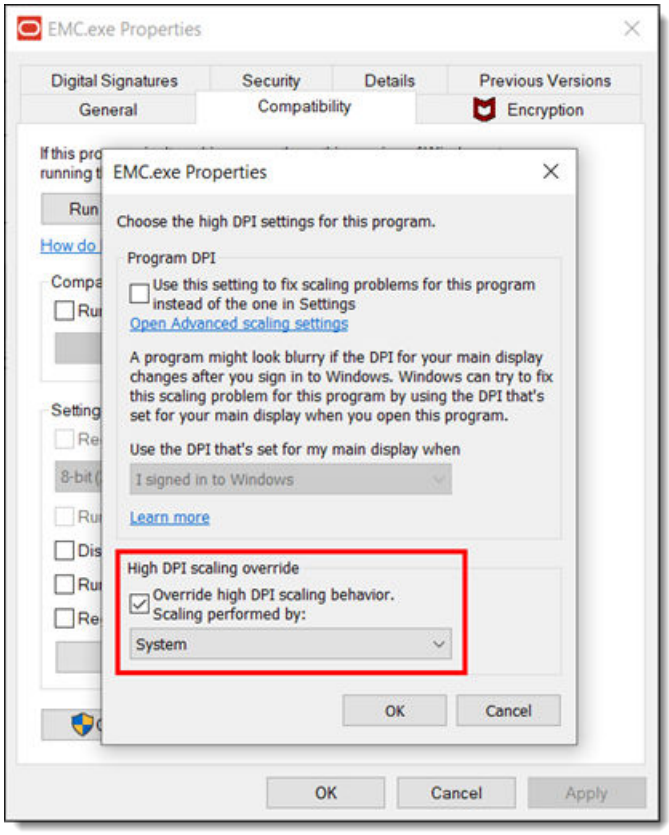
1. Close the EMC on the computer you are using.
2. Navigate to the `<Drive letter>:\...\Oracle Hospitality\EMCClient` folder, right-click on the **EMC.exe** file, and then select **Properties**.
3. Click the **Compatibility** tab.
4. Click the **Change high DPI settings** button.

Figure 1-5 EMC.exe Properties Window



5. Enable the **Override high DPI scaling behavior. Scaling performed by** checkbox.
6. From the drop-down list, change the scaling override to **System**, and then click **OK**.

Figure 1-6 EMC.exe Properties Window Scaling Override Settings



7. Click **Apply**.
8. Reopen your EMC and review.

2 Getting Started

This chapter provides a high-level overview of Simphony configuration.

Table 2-1 Getting Started

I Want To	Go To
Configure the business start of day	Resetting Daily Totals
Add properties	Adding a Property
Configure languages	Adding a Language
Configure currencies	Payment and Currency
Add revenue centers	Adding a Revenue Center
Add employees	Employees and Privileges
Add menu items	Menu Items
Add condiments to menu items	Condiments
Create combo meals	Combo and Fixed Price Meals
Configure menu levels	Menu Levels
Configure service charges	Service Charges
Configure taxes	Taxes
Configure discounts	Discounts
Configure guest checks and receipts	Guest Checks
Add workstations	POS Workstations
Configure workstation touchscreens	Workstation Touchscreen Pages
Configure Kitchen Display Systems	*Oracle Hospitality Simphony KDS Configuration and User Guide*
Configure printers	Printers
Configure cash drawers, coin dispenses, barcode scanners, and other peripheral devices	Peripheral Devices

3
Enterprise

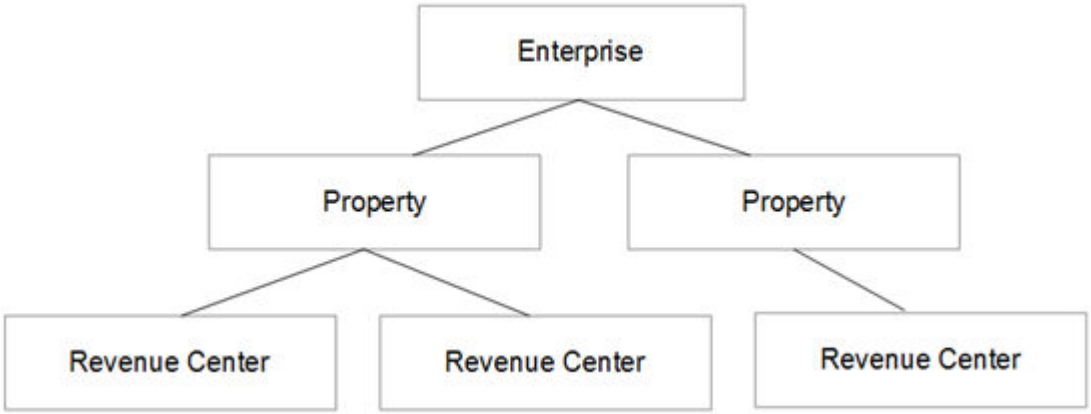
The term Enterprise refers to the company's business operations managed by Simphony. Simphony supports multiple properties, and administrators can configure each property individually. Simphony allows these properties to report centrally to a single database.

Configuration flexibility accommodates differences between properties and revenue centers. In an Enterprise, the EMC configuration hierarchy is important to the administrator. Some module components are configured at the Enterprise and are then used in various properties and revenue centers.

The EMC level refers to the location where an EMC module is configured. In the EMC, you can configure modules for the Enterprise, property, revenue center, and zone levels based on the information you are configuring. For example, employee roles are set at the Enterprise level because typically a company keeps privileges the same throughout the Enterprise (for example, all bartenders have the same privileges). Tax rates are set at the property level because a property in Chicago uses different tax rates than a property in Dallas. Order devices are set at the revenue center level for a particular restaurant.

The following figure depicts the Enterprise with two properties. One property has two revenue centers (they might be a restaurant and bar), while the other property has one revenue center.

Figure 3-1 Enterprise Hierarchy Organization Levels



Inheritance and Overrides

When configuration elements that are the same throughout an Enterprise, inheritance allows you to configure the elements once and use them throughout the properties and revenue centers. When an operation differs at the property or revenue center levels, override allows you to break away from the ancestry.

When you configure a module at the Enterprise level, the property and revenue center levels inherit the module settings. If you want the property or revenue center to have a different configuration than the Enterprise level, you can override the inheritance at the property and

revenue center levels. For example, you can configure menu items at the Enterprise level, and override the menu items for a property by changing the configuration at the property level.

Some EMC modules show the Zone/Location or Tab and Inheritance Type columns. The Zone/Location column shows the zone or the location (Enterprise, property, or revenue center) of each record. The Inheritance Type column indicates the type of inheritance for each record:

- **Defined Here, No Override**: This status indicates the record is defined in the location of the module that is open. The record does not override another record. It is possible that another record overrides this record. (EMC is not aware of records below the current location.)
- **Inherited**: This status indicates the record is defined in another location, and it is inherited in the current module and location.
- **Defined Here, Overriding**: This status indicates the record is defined in the location of the module that is open. The record overrides another record from a higher location.

Additionally, in Menu Item Maintenance, the Override Indicator column shows visual markers denoting the overriding level hierarchy (where an item is configured) for definitions on the Enterprise:

- Up arrow (↑): Indicates that there is a definition above the current level in the hierarchy.
- Down arrow (↓): Indicates that it is overridden below in the hierarchy.
- Plus sign (+): Indicates that there is a definition at another unit, which can be a peer to the current level or a different zone, which is not above or below the current unit in the hierarchy.

You need to change a record from the location in which it is inherited. If the change only applies to a particular location (such as the Bar revenue center), you can override the record. You cannot edit an inherited record from a child hierarchy. When overrides exist for a record, the lowest record location applies.

The Override Indicator column is calculated only when the **Map Menu Item Override** option is set on the search panel.

Distribution

Distribution is an EMC function that enables you to copy records between properties and revenue centers. You can configure records once within the EMC and distribute the records throughout the enterprise to multiple properties and revenue centers without having to create a record multiple times.

Remote Distribution

Remote distribution enables you to distribute data between two different Simphony systems. Remote distribution is database independent; therefore, you can distribute from a Microsoft SQL database into an Oracle Database and conversely, from an Oracle Database into a Microsoft SQL database. Remote distribution is specifically designed for the following two scenarios:

- Moving data from a testing system into a production system. This allows testing in a pre-production environment before moving to production.
- Distributing a new revenue center into the production system.

The Importance of Object Numbers

When records are distributed from one location to another, the object number stays the same. Therefore, it is important to configure properties and revenue centers consistently. For example, if object number 11 is Room Charge in one property, it must be Room Charge in all properties. Consider the following sample serving period configuration in revenue center 4:

- Object Number: 1
- Default Transaction Page: 41

When distributing this record to revenue center 8, it is created with the object number 1, and there are two possibilities for the default transaction page:

- If transaction page object number 41 exists in revenue center 8, the serving period's default screen is set to 41.
- If transaction page object number 41 does not exist in revenue center 8, the default screen is set to 0. This is the standard functionality for all types of distributed records. If the referencing object number does not exist, the value is set to 0.

Configuring Distribution Privileges

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Actions** tab, and then select the appropriate privileges:

Table 3-1 Distribution Privileges

Privilege Name	Allows the Employee to ...
Distribute	Use the EMC Distribute function.
Remote Distribute Out	Move data from one revenue center to another revenue center or from one property to another property between two different Simphony systems. Select this option to allow employees associated with this role to remote distribute from this Simphony system out to another Simphony system. Employees need login credentials with permissions on the receiving Simphony system to Remote Distribute In.
Remote Distribute In	Move data from one revenue center to another revenue center or from one property to another property between two different Simphony systems. Select this option to allow employees associated with this role to remote distribute from another Simphony system into this Simphony system. Employees need **Remote Distribute Out** permissions on the other system to distribute in.

3. Click **Save**.

Distributing Properties and Revenue Centers

1. To distribute a property:

a. Select the Enterprise, click **Setup**, and then click **Properties**.

b. Select the source property record.

2. To distribute a revenue center:

a. Select the property, click **Setup**, and then click **RVC Configuration**.

b. Select the source revenue center record.

3. To distribute within the same Simphony system, in the EMC toolbar, click **Edit**, and then click **Distribute**.

4. To remotely distribute between Simphony systems:

a. In the EMC toolbar, click **Edit**, and then click **Remote Distribute**.

b. Enter or select the **Server** or the IP address of the destination Simphony system.

c. Enter the user credentials for the destination system in the **User** and **Password** fields respectively, and then click **OK** to log on to the system.

5. From the Destination pane, select the destination properties or revenue centers.

6. From the Modules To Copy pane, select the modules to distribute.

7. Select the appropriate options:

The following table lists the distribution options and indicates whether the options are applicable for property distribution or revenue center distribution. See Distribution Based on Source, Destination, and Selected Options for more information on how Simphony distributes records based on the source record, destination record, and the configuration of options **Distribute inherited records** and **If destination record is inherited, create override**.

Table 3-2 Property and Revenue Center Distribution Options

Option	Description	Property	RVC
Create Clone	Select this option to copy IP addresses of workstations and KDS displays and to distribute all revenue centers and create new revenue centers. Selecting this option also enables the **Distribute RVCs** and **Copy IP Addresses** options.	Yes	No
Distribute RVCs	Select this option to distribute revenue centers, including all modules, in addition to distributing the selected modules for the property, if revenue centers exist in both properties. Existing records are overwritten and new records are created. Selecting **Create Clone** automatically enables this option.	Yes	No
Create RVCs	If remote distributing, select this option to create revenue centers in the destination properties, if they do not exist. This option only becomes active when you select **Distribute RVC**.	Yes	No

Table 3-2 (Cont.) Property and Revenue Center Distribution Options

Option	Description	Property	RVC
Copy IP Addresses	Select this option to copy IP addresses of the source record to the destination record. This option applies only to modules where the records include an IP address (for example, workstations and KDS displays). Selecting **Create Clone** automatically enables this option.	Yes	No
Distribute inherited records	Select to distribute all records (defined and inherited) to the destination property. Deselect to distribute only records defined at the source property.	Yes	Yes
If destination record is inherited, create override	Select to override inherited definition records in the destination property. Deselect to keep inherited records unchanged.	Yes	Yes
Distribute Data Extension if they Exist	Select to distribute any existing data extension values. The source and destination data extension property record must match	Yes	Yes

8. Click **OK**.

Distributing Records

This procedure is applicable for most modules in the EMC. Some modules, such as Menu Item Maintenance, contain module-specific distribution dialog boxes. See Distributing Menu Items for more information.

1. Navigate to the module that you want to distribute.
2. To distribute records within the same Simphony system, in the EMC toolbar, click **Edit**, and then click **Distribute**.
3. To remotely distribute records between Simphony systems:
   a. In the EMC toolbar, click **Edit**, and then click **Remote Distribute**.
   b. Enter or select the **Server** or the IP address of the destination Simphony system.
   c. Enter the user credentials for the destination system in the **User** and **Password** fields respectively, and then click **OK** to log on to the system.
4. From the Record Selection pane, select the records to distribute:
   - **All Records**: Select to copy all records from the source to the destination.
   - **Selected Records**: Select to distribute only the selected records.
   - **Specify Records**: Select to enter a list or range of records to distribute, and then enter the record numbers or ranges in the text box below separated by a comma. For example, 3-7, 9-20, 21-30.
5. From the Options pane, select the appropriate options:

   See Distribution Based on Source, Destination, and Selected Options for more information on how Simphony distributes records based on the source record, destination record, and the configuration of options **Distribute inherited records** and **If destination record is inherited, create override**.

- **Overwrite records if they exist**: Select to overwrite existing records in the destination location. If the destination record is inherited, it is not overwritten.
- **Create records if they do not exist**: Select to create new records in the destination location.
- **Distribute inherited records**: Select to distribute all records (defined and inherited) to the destination property. Deselect to distribute only records defined at the source property. This option only appears if the module supports inheritance and override.
- **If destination record is inherited, create override**: Select to override inherited definition records in the destination property. Deselect to keep inherited records unchanged. This option only appears if the module supports inheritance and override.
- **Distribute Data Extension if they Exist**: Select to distribute any existing data extension values. The source and destination data extension property record must match.

6. From the Destination pane, select one or more destinations for the records.
7. Click **OK**.

   Once distribution completes, a Distribution Report appears showing all records that were created, overwritten, and any errors encountered. You can save this report by clicking **Save to Disk**.

Distribution Based on Source, Destination, and Selected Options

The following table describes how records are distributed based on the source record, destination record, and the selected distribution options.

Table 3-3 Distribution Based on Source, Destination, And Selected Options

Record Source Type	Record Destination Type	Option Distribute Inherited Records	Option If Destination Record is Inherited, Create Override	Destination Record Created?
Inherited	Inherited	Selected	Selected	Yes
Inherited	Inherited	Selected	Deselected	No
Inherited	Inherited	Deselected	Selected	No
Inherited	Inherited	Deselected	Deselected	No
Inherited	Defined	Selected	N/A	Yes
Inherited	Defined	Deselected	N/A	No
Defined	Inherited	Selected	Selected	Yes
Defined	Inherited	Selected	Deselected	No
Defined	Inherited	Deselected	Selected	Yes
Defined	Inherited	Deselected	Deselected	No
Defined	Defined	Selected	N/A	Yes
Defined	Defined	Deselected	N/A	Yes

Configuring Permissions for the EMC

You can set user permissions for the EMC modules. The privileges define the actions which users linked to the role can perform throughout EMC.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the record of the role for which to set user permissions (for example, administrator, manager or server).
3. Click the **EMC Modules** tab.
4. Select the appropriate module permission options for the user role. You can grant user permissions for the following module actions:
   - **View**: Open and view a module. If you allow a user to Edit, Add, or Delete, you must also grant View access (otherwise the user cannot open the module).
   - **Edit**: Update fields or records within a module.
   - **Add**: Add records to a module.
   - **Delete**: Delete records from a module.
   - **Add Override**: Override records within a module.
   - **Allow Duplicate Obj#**: Add menu item records where existing records with the same number exist elsewhere in the Enterprise.
   - **Allow Duplicate Name**: Add records where existing records with the same name exist elsewhere in the Enterprise.

   To grant access for all module actions, select **All Modules** from the Global Access section for each action. The **All Modules** option allows you to easily configure all permissions for the user for every module without individually selecting each option. Selecting **All Modules** also allows the user to access new modules that become available in future Simphony versions. Oracle Hospitality recommends granting **All Modules** permission for an administrator role.
5. Click the **Actions** tab.
6. Select the appropriate action permissions for the role.

   To grant access to perform all actions, select **All Actions** from the Global Access section. Selecting **All Actions** also allows the user to perform new actions that become available in future Simphony versions. Oracle Hospitality recommends granting **All Actions** permission for an administrator type of role.
7. Click **Save**.

4

Cloning Simphony Database Configurations

Starting with Simphony 18.2.2, you can clone an existing Simphony database configuration to quickly set up a new database. Cloning a database configuration consists of extracting data from a source environment and then uploading that data to the new target environment. Roles are not deleted during the cloning process, preserving existing users, so they can continue to log onto the system.

To clone a database configuration, you need the EMC logon credentials for both the source and new target environments.

> **Note:**
>
> The Shell DB Clone tool only supports Oracle-to-Oracle Database solutions. The tool is not supported for use with Microsoft SQL Server database installations.

How it Works

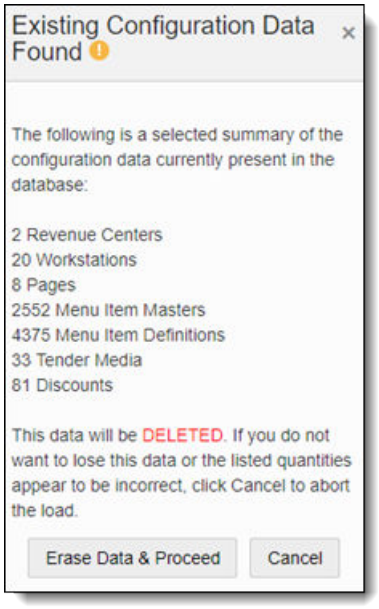
Data Extraction

- Data extraction from the source database only extracts configuration and definition related data. It does not extract any Payment Card Industry (PCI) data (where cardholder data includes any information that could be used to identify the individual) or transactional data.
- Data extraction only partially occurs for employee related data. See the Post-Uploading Cloned Data Instructions section for more information.
- A validation check is run against each extracted table for a row count of one million or more. If the detected row count is greater than one million records, the extraction process stops and users are prompted to confirm continuing with the data extraction. This is meant as a safe-guard to ensure the data extraction is occurring from the correct database.
- The Shell DB Clone tool is not designed to serve as a database backup strategy. Only a limited amount of data/configuration items are extracted which does not fulfill an entire database backup.

Uploading Data

- During the data upload process, the application first checks to ensure users are not uploading data into an organization running live transactions.
- The Shell DB Clone tool detects any existing configuration related data and generates a warning message to users which indicates the cloned data upload process deletes any currently existing configuration records (as listed on the validation check window).

Figure 4-1 Uploading Data Validation Check



> **Note:**
>
> You can proceed with uploading cloned data despite the warning message by clicking the **Erase Data & Proceed** button, but be aware the cloned data upload does not merge data, rather it only inserts cloned data.

Extracting Data from the Source Environment

1. Log in to the source environment.
2. Click **Clone Config** on the toolbar.
3. Click **Create Configuration Export File**.
4. In the Extract and Download window, click **Download Link** to download the data ZIP file.
5. Log out of the clone configuration tool.

Uploading Data to the Target Environment

1. Log in to the new target environment.
2. Click **Clone Config** on the toolbar.
3. Drag and drop the data ZIP file to the Import Configuration window or click the link to upload the file. Do **not** unzip the data ZIP file first.
4. Click **Import Configuration File**.
5. After the upload is complete, verify the configuration settings in the new environment.

If the upload fails, review the error messages returned by the clone tool, and then try the upload again.

If configuration data exists in the target environment, the clone tool detects the data during the upload. To overwrite the existing data with the data you are uploading, click **Erase Data & Proceed**.

Post-Uploading Cloned Data Instructions

Once you have successfully uploaded cloned data, you need to access the EMC for the new environment and perform the following:

Employee Configuration

Most personal information data contained in employee records is not cloned during the data extraction process. Your new environment now contains only partial employee records which can be used to log on to the EMC (for example, as the default user). Users need to configure employee information such as their first and last name, password, email address, and enable their access to generate Reporting and Analytics reports, and so on.

See the *Oracle MICROS Simphony Configuration Guide*, specifically the **Employees and Privileges** chapter and the **Configuring Employee Privileges for Oracle Hospitality Reporting and Analytics** topic in the **Reporting** chapter for more information.

Reporting and Analytics Integration

Reporting and Analytics configuration data is not cloned. Users need to map all associated properties and revenue centers to the Reporting and Analytics environment.

See the *Oracle MICROS Simphony Installation Guide*, specifically the **Post-Installation Tasks** chapter, and the **Connecting Reporting and Analytics to Simphony** topic for more information.

Workstation Configuration

Existing workstations are erased during the cloning process. Workstations for the targeted location need to be updated with their correct host names, subnet masks, and default gateways.

See the *Oracle MICROS Simphony Configuration Guide*, specifically the **POS Workstations** chapter for more information.

CAL Package Configuration

CAL packages are not cloned. As with standard operations, you need to assign CAL packages to the workstations. After this is complete, workstations with updated CAL packages can begin to process transactions.

See the *Oracle MICROS Simphony Client Deployment Guide* for more information.

5

Log File Management

Built-in log archiving capabilities are included with Simphony version 2.8 and later. Rather than deleting the oldest log file when a log reaches its maximum size, Simphony compresses the oldest log file up to two percent of its original size and then stores it in an AutoArchive folder, which is located in the same directory as the original logs. This reduces the disk space consumed by the log files and allows you to keep the files for a longer period of time. For example, if the maximum file size for a single log file is 1 MB and the total amount of disk space (log size) that can be used by all log files is 10 MB or 10 logs, when the application generates the eleventh log, it compresses the oldest log file and moves it to the AutoArchive folder.

Simphony names the archived files after the log files and includes the date and time of compression. You can easily search the log files for a particular date. For example, if the log file is Log_PEPPER_172.txt, the archived file is Log_Pepper_172.DateOfCreation_TimeOfCreation.zip.

Simphony purges archived log files only when one of the following configured thresholds is met:

Table 5-1 Log Archive Purge Thresholds

Purge Threshold	Description
LogArchiver.MinDiskUsedPercent	This threshold defines the free disk space threshold. When the free disk space falls below the configured percentage, Simphony purges the archived files. The minimum disk space is set to 10% by default.
LogArchiver.MaxDiskUsedMB	This threshold defines the maximum size for the archived files. When the total size of all the archives exceeds the configured amount, Simphony purges the archived files. The size is set to 100 MB by default.
LogArchiver.DaysToKeeep	This threshold defines the number of days to keep the archived logs before purging. The number of days to keep is set to 21 days by default.

The ArchiveHistory.txt file, which resides in the original log directory, tracks log archiving operations. When this file reaches 20 KB, Simphony renames it to ArchiveHistory.previous.txt. Simphony retains only one ArchiveHistory.previous.txt file at a time.

Log archiving is active by default for application servers and services, while it is deactivated by default for workstation services due to the constrained disk space of workstations.

Modifying the Default Log Archive Purge Settings for Application Services

To modify the default archive purge settings, you need to add entries to four application service configuration files. The following table lists the configuration files for the application services and their locations:

Table 5-2 Application Services Configuration Files

Application Service	Configuration File Name	Location
EGateway Service	Web.config	[Drive Letter]:\MICROS\Simphony2\EGatewayService
Data Transfer Service (DTS)	DataTransfeService.exe.config	[Drive Letter]:\MICROS\Simphony2\DataTransfeService
Direct Posting Service (DPS)	DirectPostingService.exe.config	[Drive Letter]:\MICROS\Simphony2\DirectPostingService
Sequencer Service	SequencerService.exe.config	[Drive Letter]:\MICROS\Simphony2\SequencerService

1. Browse to the file location and open the configuration file.
2. Add the following entries:
   - To turn off log archiving, add `<add key="LogArchiver.Enabled" value="false" />`.
   - To change the free disk space threshold, add `<add key="LogArchiver.MinDiskUsed-Percent" value="`*`MinDiskUsedPercent`*`" />`.
   - To change the maximum size for the archived files, add `<add key="LogArchiver.MaxDiskUsedMB" value="`*`MaxDiskUsedMB`*`" />`.
   - To change the number of days to keep the archived logs, add `<add key="LogArchiver.DaysToKeep" value="`*`DaystoKeep`*`" />`.
3. Repeat Steps 1 and 2 for each configuration file listed in the table.

Enabling Log Archiving for Workstations

Workstations keep 10 logs by default. In some cases, it is necessary to retain the logs for a longer period of time. This is accomplished by enabling the **Log Archiving** settings on each workstation where needed.

Once enabled, an additional folder in the EGatewayLog folder named **AutoArchive** is created. The logs that are rotated out of the EgatewayLog folder are then zipped and placed in the AutoArchive folder.

There are default values in place to ensure that the Workstations do not keep excess logs, which can cause disk space issues. The available default values are:

- MinDiskUsedPercent: 10 — When only 10% free space remains on the workstation's drive, the oldest logs are removed as each log is rotated.
- MaxDiskUsedMB: 100 — When only 100 MB of free space remains on the workstation's drive, the oldest logs are removed as each log is rotated.
- DaysToKeep: 21 — Any archived logs older than 21 days are removed

To override the defaults, optional keys and values can be added as well. Care should be taken when overriding the default values to ensure that the Workstation does not run out of disk space.

To enable this functionality:

1. Browse to the [Drive Letter]:\MICROS\webserver\wwwroot\EGateway folder and open the Web.config file.
2. Add the following entry to the Web.config file:

   ```
   <add key="LogArchiver.Enabled" value="true" />
   ```

3. Add optional keys to override default values by adding the following entries:
   - `<add key="LogArchiver.MinDiskUsedPercent" value="MinDiskUsedPercent" />`
   - `<add key="LogArchiver.MaxDiskUsedMB" value="MaxDiskUsedMB" />`
   - `<add key="LogArchiver.DaysToKeep" value="DaystoKeep" />`
4. Save the changes.

Enabling Upload of Egateway and SPI Logs

You can allow Oracle Customer Support staff to access the Egateway and Simphony Payment Interface (SPI) logs from POS client devices operating in a specific locations (for example, restaurant, stadium, or airport). POS Operations automatically uploads these log files, and Support staff can access and use them to troubleshoot payment issues, decreasing time spent resolving issues. All workstations at a location that are running POS Operations will upload the log files to the cloud, except for KDS Displays.

After enabling the upload of Egateway and SPI logs, and then starting the workstation(s) or updating the workstation database, the following occurs:

- POS Operations uploads all SPI files that are available via PMC.
- POS Operations randomly selects a time between 12:00 a.m. and 6:00 a.m. local time the next day to automatically upload log files.
- Once the next upload time is selected, the upload will occur every 24 hours thereafter.
- A local cache memory stores the files that were uploaded and the last modification time of those files.
- In each automatic upload, log files are uploaded only if the last modification time has been changed. This prevents POS Operations from flooding the Enterprise with the same older log files.

You can view the uploaded files in the EMC Workstations module on the Service Log tab. Each uploaded file contains comments in the Sender Note column in the format `filename(uploaded date time)` (for example, `Log_WS1.txt (12/22/022 03:44 AM)`. The files can be read, deleted, or saved to disk.

To enable the automatic upload of Egateway and SPI log files:

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Options** tab, and then select **63 - Enable Upload of Egateway and SPI Logs**.

   If you deselect this option, the automatic upload of log files will be disabled upon the next update of the workstation database.
3. Click **Save**.

You can also manually upload log files to the EMC on demand at any time from the workstation using the Property Management Console (PMC). On the workstation device, press the **Launch PMC** function key, press **Support**, and then press **Log Files**. Click the **Select Log File** tab, highlight the log to upload, and then press **Upload**.

6
Properties

A property is a place of business. A property can have one or more revenue centers within a confined geographic location. For example, a hotel property can have three revenue centers (restaurant, bar, and gift shop), and a shopping mall can have several restaurant revenue centers. Both properties can belong to the same Simphony Enterprise, but each property has separate sales figures, tax information, and other configuration specific to the location.

Adding a Property

1. Select the Enterprise level, click **Setup**, and then click **Properties**.
2. Click the **Insert** icon  on the toolbar.
3. In the Add Property dialog, enter the **Property Number** and **Property Name**.
4. To include this property in Reporting and Analytics, select **Add Location To Simphony Reporting**.
5. Select the **Time Zone** for the property location.
6. (Optional) The content in the Simphony Reporting Location section is intended for users of Simphony Transaction Services (STS) Gen 2. If you want customers to view your property name and location information via STS Gen 2, complete this section.

   See Transaction Services for more information about Transaction Services Gen 1 and STS Gen 2.
7. If the property connects to Labor Management Cloud Service, enter the **Simphony Labor Logon** username and **Simphony Labor Password**.
8. Select the appropriate options as applicable:
   - **Enable Inventory**: Select to enable Inventory Management for the property.
   - **Enable Enterprise Labor Management**: Select to enable Labor Management for the property.
9. (Optional) To copy information from a property template, in the Source Property section, select **Copy from source property**. The hierarchy panel and **Modules To Copy** fields become active.
   a. To add the property to the same locations as the template property, select **Add to Zones**
   b. In the hierarchy panel, select the property to use as the source property.
   c. In the Modules to Copy section, select the modules you want to copy from the source property. To automatically select all modules, click the **Select All Modules** link.
   d. (Optional) To copy the Internet Protocol (IP) addresses of workstations and kitchen display system (KDS) displays, and to create new revenue centers, select **Create Clone**. Selecting this option essentially selects the next two options (described in Steps 9d and 9e).
   e. (Optional) To create new revenue centers for the property based on the existing revenue centers in the template property, select **Create RVCs**.

f. (Optional) To copy the IP addresses of workstations and KDS displays from the source property to the destination property, select **Copy IP Addresses**. Use this option when properties are segmented on their own networks and IP address conflicts do not occur.

g. (Optional) To distribute all records (defined and inherited) from the source property to the destination property, select **Distribute inherited records**. Deselect this option to distribute only records defined at the source property to the destination property.

h. (Optional) To create an override record in the destination property when an inherited definition exists, select **If destination record is inherited, create override**.

i. (Optional) To distribute data extension values, select **Distribute Data Extensions if they exist**.

10. Click **OK** to copy the records from the source template property to the new property.
11. Click **Save**.
12. If you want to manually configure the property settings, double-click the property you just added to switch to form view.

> **Note:**
>
> The property location details listed here (excluding the optional items) are required to be configured if you are using the Oracle MICROS Payment Cloud Interface.

13. On the **General** tab, configure the following fields:

a. (Optional) The **Consumer Facing Name** field in the General section is intended for users of Simphony Transaction Services (STS) Gen 2. If you want customers to view your revenue center name and location information via STS Gen 2, complete this section.

See Transaction Services for more information about Transaction Services Gen 1 and STS Gen 2.

b. **Phone Number**: Enter the phone number for the property.

c. **Address 1**: Enter the address line 1 for the property.

d. **Address 2**: Enter the address line 2 for the property.

e. **Address 3**: Enter the address line 3 for the property.

f. **City**: Enter the city in which the property is located.

> **Note:**
>
> For users who previously entered text in the **Country** and **State/Region** fields in the Properties and RVC Configuration modules prior to performing an upgrade to this release, Oracle MICROS Food and Beverage recommends (after upgrading) to access each Property and Revenue Center individually and update these fields using the drop-down lists now provided there. In an effort to make it easier for users to view the prior text entries for these fields, the old text is shown in red font in the Country and State/Region fields. Once completed, Data Transfer Service (DTS) jobs update the R&A database with the new settings.

g. **Country**: Select the country in which the property is located from the drop-down list.

> **NOT_SUPPORTED:**
>
> When a country is first selected in the **Country** field and then saved, you cannot go back to assign a null or empty field again.

h. **State/Region**: Select the state or region in which the property is located from the drop-down list.

i. **ZIP/Postal Code**: Enter the ZIP or postal code for the property.

j. **Latitude** and **Longitude**: Enter the latitude and longitude coordinates for the property in each respective field.

k. (Optional) **Comment**: Enter additional information about the property in this free text field.

l. Click **Save**.

14. In the Oracle MICROS Reporting and Analytics section, select the location configured in the reporting database from the **Report Location** drop-down list. The Oracle MICROS Reporting and Analytics database determines the locations that appear in the list.

    a. To add a location, click **New**, and then enter the appropriate information. An administrator must then add the information to the Reporting and Analytics property list in order to run reports.

    b. To change an existing location, click **Edit**, and then enter the appropriate information.

    If you change the report location for a live location, update the corresponding Simphony Transaction Services API account in Oracle MICROS Reporting and Analytics to use the same location.

15. Click **Save**.

Adding a Revenue Center

1. Select the property, click **Setup**, and then click **RVC Configuration**.
2. Click the **Insert** icon  on the toolbar.
3. From the Add Revenue Center dialog, enter the **RVC Number** and the **RVC Name**.
4. (Optional) To copy information from an existing revenue center, select **Copy from source Revenue Center** from the Source Revenue Center section. The hierarchy panel and **Modules To Copy** fields become active.

    a. From the hierarchy panel, select the revenue center to use as the source revenue center.

    b. From the Modules to Copy section, select the modules you want to copy from the source revenue center. To automatically select all modules, click the **Select All Modules** link.

    c. (Optional) Select **Distribute inherited records** to distribute all records (defined and inherited) from the source revenue center to the new revenue center. Deselect this option to distribute only records defined at the source revenue center to the new revenue center.

    d. (Optional) Select **If destination record is inherited, create override** to create an override record in the new revenue center when an inherited definition exists.

e. (Optional) Select **Distribute Data Extensions if they exist** to distribute data extension values if they exist.

5. Click **OK** to copy the records from the source template revenue center to the new revenue center.

6. If you want to manually configure the revenue center settings on the **General** tab, configure the following fields:

> **Note:**
>
> The revenue center location details listed here (excluding the optional items) are required to be configured if you are using the Oracle MICROS Payment Cloud Interface.

a. (Optional) The **Consumer Facing Name** field in the General section is meant for users of Simphony Transaction Services (STS) Gen 2. If you want customers to view your Revenue Center name and location information via STS Gen 2, complete this section.

   See Transaction Services for more information about Transaction Services Gen 1 and STS Gen 2.

b. **Phone Number**: Enter the phone number for the property.

c. **Address 1**: Enter the address line 1 for the property.

d. **Address 2**: Enter the address line 2 for the property.

e. **Address 3**: Enter the address line 3 for the property.

f. **City**: Enter the city the property is located.

> **Note:**
>
> For users who previously entered text in the **Country** and **State/Region** fields in the Properties and RVC Configuration modules prior to performing an upgrade to this release, Oracle MICROS Food and Beverage recommends (after upgrading) to access each Property and Revenue Center individually and update these fields using the drop-down lists now provided there. In an effort to make it easier for users to view the prior text entries for these fields, the old text is shown in red font in the Country and State/Region fields. Once completed, Data Transfer Service (DTS) jobs update the R&A database with the new settings.

g. **Country**: Select the country in which the property is located from the drop-down list.

> **NOT_SUPPORTED:**
>
> When a country is first selected in the **Country** field and then saved, you cannot go back to assign a null or empty field again.

h. **State/Region**: Select the state or region in which the property is located from the drop-down list.

i. **ZIP/Postal Code**: Enter the ZIP or postal code for the property.

j. **Latitude** and **Longitude**: Enter the longitude and latitude coordinates for the property in each respective field.

k. **Comment**: (Optional) Enter additional information about the property in this free text field.

l. Click **Save**.

7. Toggle to Table view and select the following options as applicable for the new revenue center:
   - **LDS Active**: Select this option if the revenue center uses a Liquor Dispensing System (LDS), which is a third-party system used for pouring and tracking liquor and beverages, as well as mixed drinks.
   - **KDS Controller**: Select the KDS Controller to control the kitchen display system (KDS) order devices in the revenue center.
8. Click **Save**.

After adding a new revenue center, restart the workstations to ensure changes are saved.

Revenue Center Groups

You can create a revenue center group for use when a property hosts an event that occurs in multiple revenue centers. For example, a baseball game takes place in every revenue center at a stadium. When you create the event, you can associate it with the revenue center group rather than selecting each revenue center individually.

Revenue center groups are also useful when multiple revenue centers use the same kitchen or bar to prepare menu items. You can set a Menu Item Availability record for a revenue center group.

Configuring a Revenue Center Group

1. Select the property, click **Setup**, and then click **Revenue Center Groups**.
2. Insert a new record or select an existing record, and then double-click the record to open it.
3. Select the revenue centers to include in the revenue center group.
4. Click **Save**.

Deleting a Property

Administrators can remove a property from the Enterprise when it has stopped operating. All property level data is removed, including revenue centers in the property.

Before deleting a property, close all modules in the EMC that are related to the property, and close all open checks and transactions.

1. Select the Enterprise level, click **Setup**, and then click **Properties**.
2. Highlight the property to delete, and then click the **Delete** icon () on the toolbar.
3. On the Properties: Delete dialog, click **Yes** to confirm.

   A progress bar shows the status. Depending on the amount of data being deleted, the deletion process may take several minutes.

If you click **Cancel**, the operation will finish deleting the current property, but will not delete any properties remaining in the queue.

7 Zones

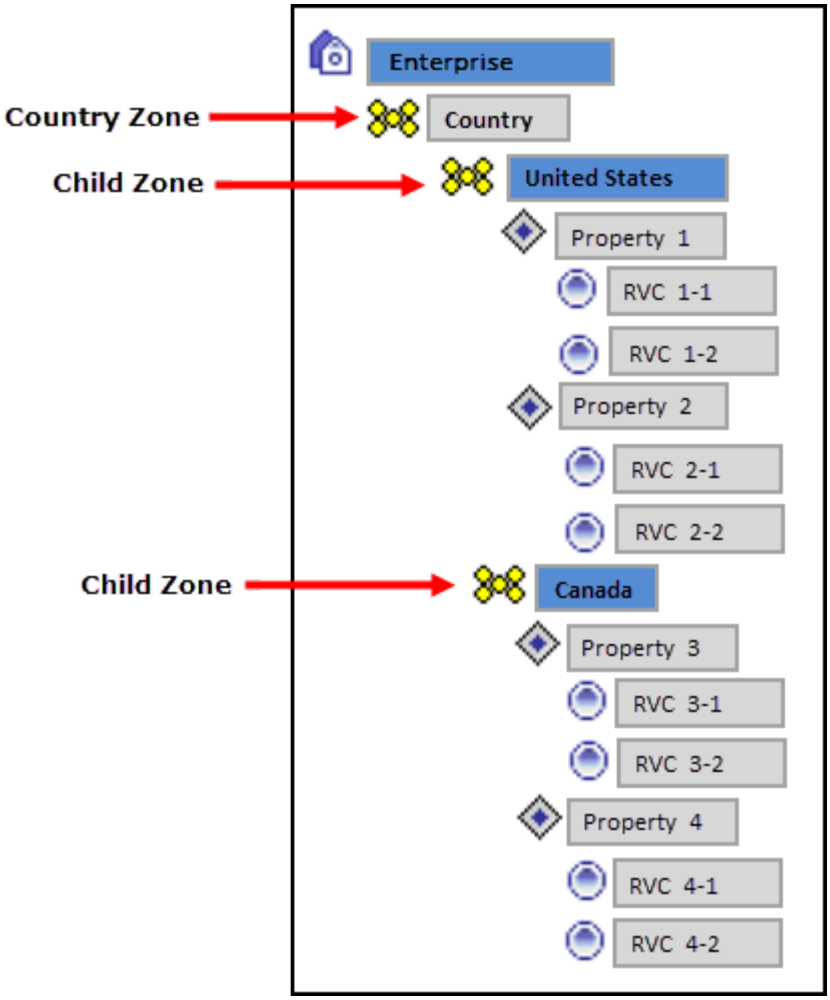
Zones are custom hierarchies within the Enterprise. You can use zones to group similar aspects of an Enterprise together to manage configuration tasks with minimum effort and to eliminate duplicate configuration. For example, you can categorize:

- Taxes by country, state, county, and city
- Prices by region, tier, and property
- Menu item maintenance by item groups (food, beverage, retail), price tiers, and stores

Zones assist in managing definitions and records in a more streamlined manner. Simphony's Inheritance and Override feature enables you to configure definition records on the Enterprise level, and they are inherited throughout the system. If there are unique circumstances where a particular definition must be different from an inherited record, you can override that record at the zone, property, or revenue center level. Inheritance and Override contains more information.

For example, you can create a country zone for the Enterprise, create sub-zones (child zones) for each country, and then create or override the records from the relevant level as illustrated in the following figure. This figure shows a sample zone hierarchy for a single record group, where the existence of records is denoted in blue and inheritance is denoted in gray.

Figure 7-1 Sample Zone Configuration



A single revenue center or property can belong to multiple zones, and a single zone can contain an unlimited number of sub-zones. Zones with meaningful names provide a clear overview of the structure. Configuring zones effectively:

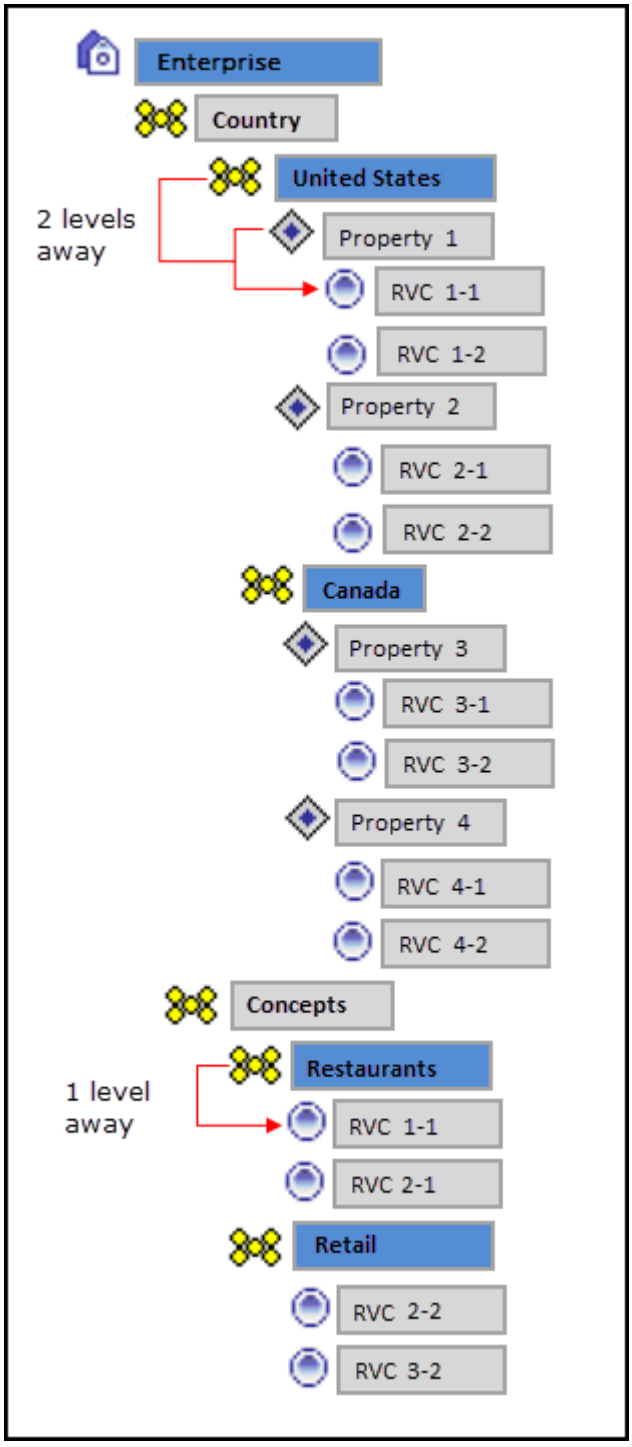
- Allows privileged users to view and navigate the entire Enterprise from within the EMC in a more logical manner
- Creates a big picture that shows which locations might be affected by potential changes or updates
- Saves time with definition handling and updates throughout the system
- Controls definition distribution to POS clients

Record Priority within Multiple Zone Configurations

If a property or revenue center exists in multiple zones, Simphony uses the definition record which is closest to the hierarchy when determining which record to use for a specific object number. For example, in the following figure, the Enterprise depicted has two separate zone hierarchies. The Country zone has two sub-zones: United States and Canada. The second zone, Concepts, also has two sub-zones: Restaurants and Retail. Both zone hierarchies have revenue centers in common. Imagine that a discount record is defined in the Enterprise, and the four sub-zones (United States, Canada, Restaurants, and Retail) override this discount

record, which is then inherited by their properties and revenue centers respectively. The existence of the record is denoted in blue and inheritance is denoted in gray.

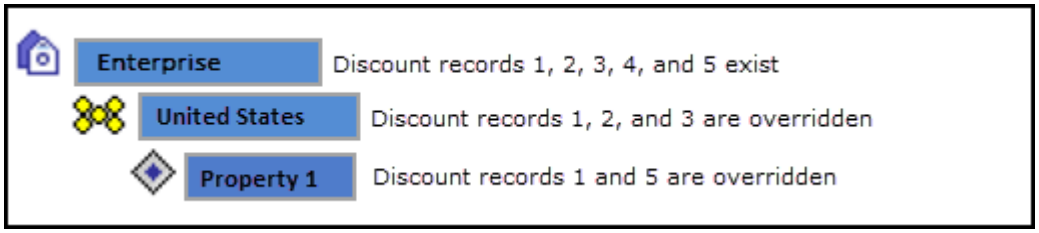
Figure 7-2 Sample Configuration of a Single Record Definition



Because the revenue centers are closer to the definition record in the Concepts zone (RVC 1-1 is only one level away from Restaurants while it is two levels away from United States), the Concepts zone record wins.

Consider the following sample configuration for multiple discount records:

Figure 7-3 Sample Configuration of Multiple Record Definitions



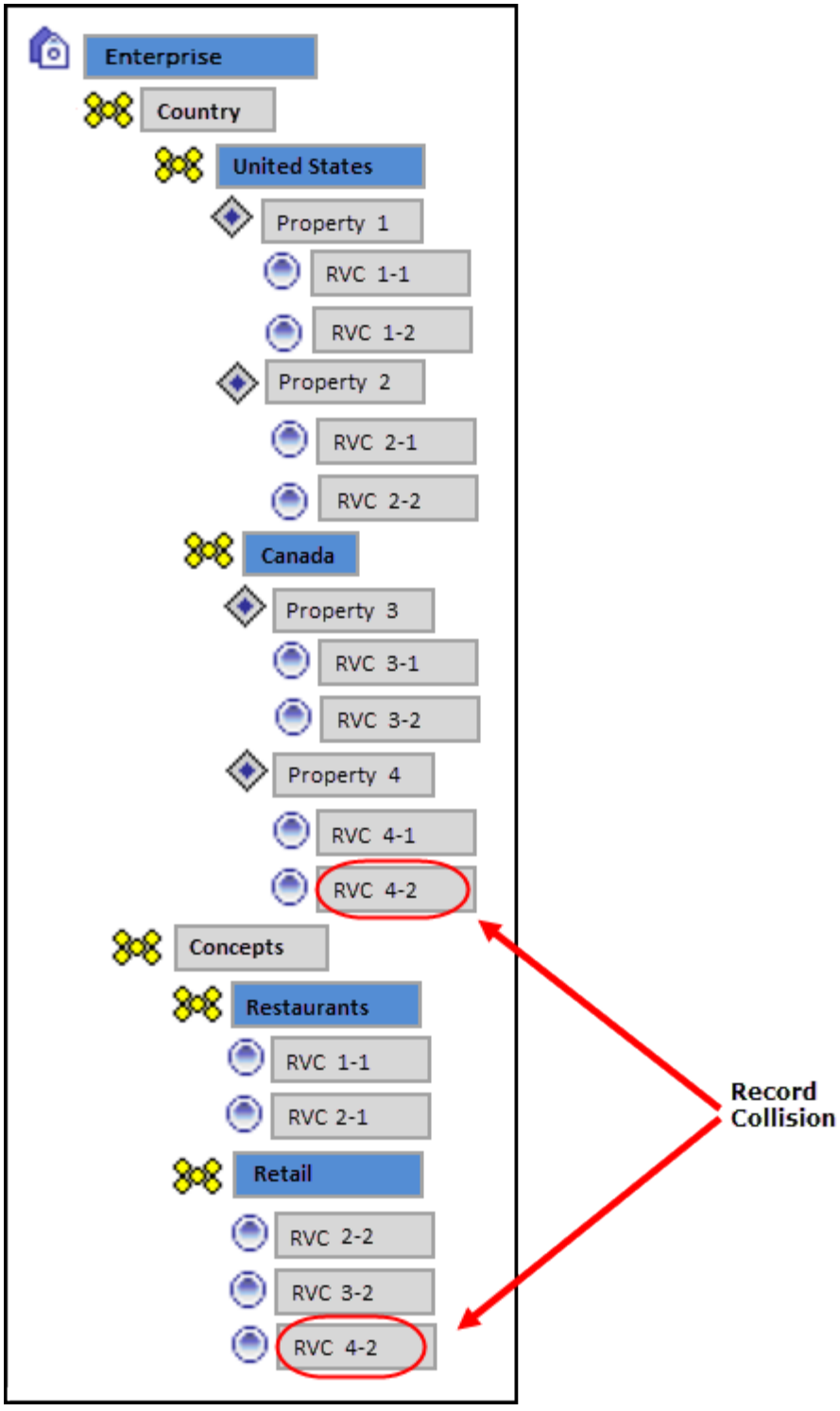
Given the configuration in the above image, Simphony uses the following discount records for Property 1:

- Record 1 defined in Property 1
- Record 2 defined in the United States zone
- Record 3 defined in the Unites States zone
- Record 4 defined in the Enterprise
- Record 5 defined in Property 1

Record Collisions

Record collisions occur when a property or revenue center has two competing winning records that are the same number of levels away from the hierarchy. For example, in the following figure, RVC 4-2 is one level away from Property 4 and Retails, both of which have overriding record definitions.

Figure 7-4 Sample Zone Configuration with Record Collision



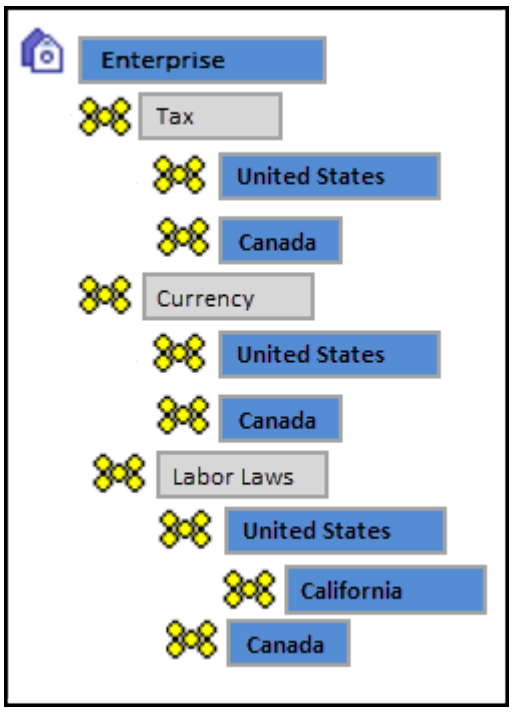
While EMC prevents you from manually creating a competing record, such situations can arise when moving revenue centers and zones, or when using the Import/Export Service. In such instances, EMC detects the error and prevents you from opening the module corresponding to the definition record until the conflict is resolved.

Example Configuration Scenarios

You can use zones to organize the Enterprise in multiple ways. Here are a few examples:

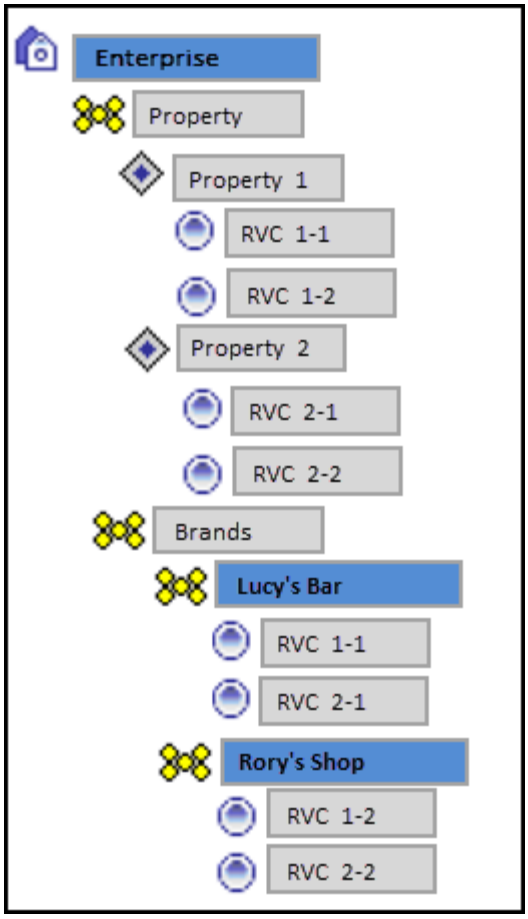
- Example 1: Region zones are useful for many applications, from global considerations such as alphanumeric keyboards and currencies to tax or labor laws. These zones are usable repeatedly in multiple trees.

Figure 7-5 Sample Zone Configuration for Regions



- Example 2: Enterprises that have different concepts (Dine-In, Take-Out) between properties or revenue centers can manage their differences through zones. Similarly, zones are useful for configuring brands. Hotel chains that have certain concessions in various or all properties can configure them as zones and place the appropriate revenue centers into the Brand Zones to inherit the relevant records.

Figure 7-6 Sample Zone Configuration for Brands



Reporting and Analytics Posting

Reporting and Analytics is zone independent. Transactions post to the actual location where the transaction originated. For example, if a menu item definition record originated in the Retail zone, it posts under the revenue center that inherited the record from the zone at the time of the transaction. If you create an overriding record later in the same revenue center and another transaction is posted for the same menu item, Reporting and Analytics shows as if the price change was made for the same menu item.

Creating Zones

1. Select the Enterprise, click **Setup**, and then click **Zone Configuration**.
2. In the Zone Configuration pane on the left, right-click Enterprise, and then select the appropriate option:
   - **Add Zone**: Select to create only a single zone.
   - **Add Multiple Zones**: Select to create more then one zone simultaneously.
3. In the Add Zones to Enterprise dialog, enter the **Name** and **Object Number** for each zone, and then click **OK**.

   Enter a meaningful name, such as a description of what modules are defined in the zone, to provide a clear overview of the structure.
4. To apply enforcement rules to the zone to prevent record collisions and unwanted updates:

a. From the Zone Configuration pane, select a zone, and then click **Edit Selected Note**.

b. Select the appropriate **Zone Type**:

- **0 - None**: Select if the zone has no restrictions.
- **1 - Properties and RVCs**: Select if the zone can only contain properties and their revenue centers.
- **2 - RVCs Only**: Select if the zone can only contain revenue centers.

c. Select the appropriate enforcement rules. The following table describes the enforcement rule options and indicates the zone types for which each option is available.

Table 7-1 Zone Enforcement Rule Options

Option	Description	None	Properties and RVCs	RVCs Only
1 - Enforce Unique Properties within this Zone	Select to prevent properties from existing more than once in the zone and all child zones.	No	Yes	No
2 - Enforce Unique RVCs within this Zone	Select to prevent revenue centers from existing more than once in the zone and all child zones.	No	Yes	Yes
3 - Modules Available in this Zone are not available in Child Zones.	Select to prevent child zones from inheriting the modules from the zone.	Yes	Yes	Yes
4 - All RVCs must be from the same Property	Select to enforce all revenue centers within the zone to belong to the same property.	No	No	Yes
5 - Sort the selected zone alphabetically	Select to sort a zone in alphabetical order.	Yes	Yes	Yes

d. To make all EMC modules configurable in the zone, select **All Modules**.

e. To select the EMC modules that are configurable in the zone, deselect **All Modules**, and then select the modules that are accessible from the EMC module list.

Modules that are available in one location are also available in the children of that location, unless you configure otherwise.

f. Click **OK**.

5. To add properties to a zone:

a. From the Zone Configuration pane, right-click the zone, and then click **Add Properties**.

b. From the Add Property dialog, select the properties to add, and then click **OK**.

6. To add revenue centers to a zone:

a. From the Zone Configuration pane, right-click the zone, and then click **Add Revenue Centers**.

b. From the Add RVC dialog, select the property to which the revenue centers belongs, and then select the revenue centers from the list.

c. Click **OK**.

7. To apply enforcement rules to the properties or revenue centers in the zone:
   a. From the Zone Configuration pane, select a property or revenue center, and then click **Edit Selected Node**.
   b. Select the appropriate enforcement rules and configurable EMC modules. Refer to the Zone Enforcement Rule Options table in Step 4 for more information on the enforcement rules.
8. Click **OK**.

8
POS Workstations

A workstation is a device used by managers, servers, bartenders, hosts, and cashiers at a property to perform various functions, such as creating guest checks, adding menu items, applying discounts and service charges, and paying a check. Examples of POS workstations include the Oracle MICROS Workstation 6 Series and the Workstation 5a.

Workstation Tasks

Adding a workstation consists of completing the following tasks:

- Adding a workstation
- Configuring workstation transaction settings
- Setting offline transaction posting time
- Configuring workstation security
- (Optional) Configuring an Android mobile device as a workstation

Adding a Workstation

1. Select the property, click **Setup**, and then click **Workstations**.
2. Insert a record for the workstation, enter the name, and then click **OK**.

   Workstations cannot be named using solely numerical characters. Alpha characters must be included in each workstations naming convention. A combination of alphanumeric characters is supported.
3. Double-click the new workstation record.
4. On the **General** tab, enter information in the following fields:

Table 8-1 General Workstation Settings

Field	Description
Type	Select the type of workstation from the drop-down list: • **1 - Mobile MICROS**: Mobile devices • **2 - Workstation Client**: Workstations and virtual machines Select this option when configuring these devices: – Oracle MICROS Tablet E-Series – Oracle MICROS Workstation 6 Series – Oracle MICROS Tablet 700 Series – Oracle MICROS Compact Workstation 310 • **3 - POSAPI Client**: Simphony Transaction Services or Pay@Table • **6 - Tablet Client**: Select this option for Android Tablet devices • **7 - Castles Tech S1F2**: Castles S1F2 payment device. Enter the device's serial number in the **Serial Number** field.
Language	Select the default language of the workstation. This is the language that appears on the workstation's Sign On screen. If an employee has a different default language set, the employee sees their default language after signing in to the workstation.
Resolution Cols	Enter the number of Resolution Columns for the workstation's display. The default value is 0 (zero).
Resolution Rows	Enter the number of Resolution Rows for the workstation's display. The default value is 0 (zero).
Log Verbosity	Select the logging verbosity for the workstation. Select 0 (zero) for minimal logging. Higher log verbosity provides more information in the log file, which may be helpful in troubleshooting issues.
(Optional) Workstation Class	Select a Workstation Class to allow similar workstations to be grouped together and to share certain page configuration settings.
Database Update Frequency	Enter the number of seconds for the workstation to receive changes. The default value is 1800 seconds (30 minutes). The value in this field overrides the Property Parameter's Database Update Frequency setting.
Check Inactivity Timeout	Enter the number of seconds before the workstation shows the message (Do you need more time?), prompting the workstation operator to cancel the transaction. When you enter 0 (zero), the message does not appear. When you select **Enable Follow Me** from the RVC Parameters module, the check is automatically suspended rather than cancelled.
Check Inactivity Dialog Timeout	Enter the number of seconds that the workstation shows the Inactivity dialog before automatically cancelling the transaction. This field is unavailable when you set the **Check Inactivity Timeout** value to 0 (zero).
Report Timeout	Enter the number of seconds the workstation waits for a response before showing a communication failure notice.

Table 8-1 (Cont.) General Workstation Settings

Field	Description
Address / Host Name	Enter the IP address of the Oracle MICROS Simphony Service Host where the workstation application runs. When configuring this field for **Castle S1F2** devices, after the Simphony POS Android Package (APK) has been installed on the device and you have the device at hand, find its assigned IP Address, and copy it to this field, and then click **Save**. If the device is not immediately accessible, you must remember to access the device and then enter its IP Address here to complete its configuration. **NOT_SUPPORTED:** To utilize Castles devices, you must be running Reporting and Analytics version 20.1.10 version or higher. See Replacing, Deleting, or Upgrading Castle S1F2 Devices for more information.
Subnet Mask	Enter the subnet mask of the Service Host where the workstation application runs.
Default Gateway	Enter the default gateway of the Service Host where the workstation application runs.
Is Connectionless	Select this option to have the Service Host open and close a new connection for each web service call. This prevents the workstation from reaching the maximum number of web connections allowed, although the connection becomes slightly slower.
Is Windows Service	Select this option to allow the Service Host to start as a Windows service. The Service Host service starts on Microsoft Windows startup with other Microsoft Windows services. The POS client starts only when the workstation operator signs on to the operating system. If you select this option, you need to change the ports of the services being run (for example, Check and Posting Service (CAPS) and Oracle Hospitality Simphony Kitchen Display System (KDS) Controller) in addition to the POS client. Use the EMC modules to change the ports. If a non-POS client is required to run on the Service Host, it must run on a different port than the workstation port. You can also set the Service Host to run as a Microsoft Windows service from the Service Host module (rather than from the Workstations module). If you set this option in the Service Host module, you do not need to change the ports of the services being run as the device is not intended to run the POS client.

5. Click the **Options** tab, and then click the **Display/Security** subtab.
6. Select the appropriate Display Options:

Table 8-2 Workstation Display Options

Display Option	Description
5 - Do Not Clear Screen After Transaction	Select this option to have the last screen of a transaction remain visible on the workstation display after the transaction is complete.
6 - Enable Rear Display	Select this option to enable output to a rear customer display that is attached to the workstation.
33 - Show Cursor	Select this option to show the mouse cursor for this workstation when workstations are installed on PCs (such as a host/hostess desk). This option is usually disabled for Workstation 4 and other Oracle MICROS hardware platforms.
39 - Floating Tablet	Select this option for an Oracle tablet that is not docked to a base station. When enabled, the tablet cannot configure or use the majority of the hardware devices that traditional workstations support.
42 - Display Discounts on Customer Display	Select this option to show discount totals and amount due on the second line of the customer display. Deselect this option to show only the amount due.
43 - Auto-Pickup Next Check	In a drive-through environment, select this option to allow the Payment Window workstation to automatically pick up the oldest open check (that has this workstation's order type) as soon as the current check is paid. When no checks are open, the workstation prompts to check again or to exit the Auto-Pickup functionality. This option is intended for drive-through environments that have an Ordering Window and a Payment Window.
44 - Use LCD Customer Display	Select this option to use an LCD customer display. Deselect this option to use a pole display. This option is dimmed when **6 - Enable Rear Display** is deselected.
52 - Do not display currency symbol on rear/customer display	Select this option to suppress the currency symbol appearance on the rear customer display.
53 - Display non-rounded amounts on rear/customer display	Select this option to show a non-rounded value for the total amount due on a rear customer display. You must also select **4 - Round Currency** in the Currency Parameters module. Configuring Base Currency and Alternate Currency contains more information.
54 - Display Change to dispense in Bills in the Change due dialog	Select this option to show the Change to Dispense in bills in the Change Due dialog. This lets workstation operators easily determine the change due in bills while the coin dispenser dispenses the rest of the amount.
61 - Always Hide Frame	Select this option to hide the POS Operations window frame when the POS Operations UI is not in full-screen mode.
62 - Prompt for Destination Printer when docked	Select this option to have the workstation prompt for a Destination Printer (if configured) when docked.

7. If the workstation is a concessions terminal, click the **Offline/Misc** subtab, and then select option **59 - Concessions terminal**.

   This allows a separate count of concessions workstations to appear in the Enterprise Parameters module under the License Configuration tab.

8. Click the **Printers** tab.

9. Click the **Select** link next to each printer type that you need to configure, select the printer, and then click **OK**.
10. Click the **Revenue Centers** tab.
11. Select the revenue centers for the workstation. You must select at least one revenue center.
12. If you are configuring the Castles S1F2 device, click the **Devices** tab.
    a. In the Peripheral Device Configuration section, click the **Add** link.
    b. In the **Select Peripheral Device Type** drop-down list, select **Simphony Payment Interface**.
    c. Ensure that the **Primary Host** shows `https://localhost:8443` to allow self pay, and then click **OK**.
13. Click **Save**.
14. When adding or removing workstations, you need to edit the system's license count using the following steps:
    a. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
    b. Click the **License Configuration** tab.
    c. Click **Configure** adjacent to **Workstations Client License Count**.
    d. To add a license count (for the first time), select **I would like to set the license count to X, making the new license count X**.
    e. To append licenses to an existing license count, select **I would like to add X to the current license count, making the new license count Y**.
    f. Enter the number of client licenses purchased.
    g. (Optional) Enter additional details regarding the purchased license in **Enter Reference Information for the License Count Change**, and then click **OK**.
    h. Repeat Steps 13-c through 13-g for **Transaction Service Client License Count**, and **KDS Client License Count**.
    i. Click **Save**, and then click **Yes** to agree to the license.
    j. To perform a side by side comparison of the number of purchased licenses against the number of configured clients, click **View** adjacent to the Properties, Revenue Centers, Concessions Terminals, Workstation Client License Count, Transaction Services Client License Count, or KDS Client License Count labels.

Configuring Workstation Transaction Settings

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation record to open it.
3. Click the **Transactions** tab, and then enter information in the following fields:

Table 8-3 Workstation Transaction Settings

Field	Description
Minimum Check Number	Enter the minimum guest check number to use: • When the workstation is in offline mode • When the workstation is used in revenue centers without the RVC Parameters option **Use Revenue Center Check Numbers**. In these revenue centers, each workstation determines its own check number range.
Maximum Check Number	Enter the maximum guest check number to use: • When the workstation is in offline mode • When the workstation is used in revenue centers without the RVC Parameters option **Use Revenue Center Check Numbers**. In these revenue centers, each workstation determines its own check number range.
(Optional) Default Order Type	Select the default active order type for the workstation (for example, Dine In, Take Out, or Drive Thru).
Barcode Format Set	Select the barcode format for the workstation to read barcodes of various lengths.
Cashier Link	Select the cashier record to link to the workstation. This provides a link to tracking totals for Tender/Media information. This field is available only when you select **8 - On** = **Link Cashier Totals to WS; OFF** = **Link to Operator** from the Workstations module (**Options**tab, and then the **Offline/ Misc** subtab).
Merchant Group	Select the merchant group for the workstation, or select **0 - Use RVC Setting** to use the settings from the revenue center in which the transaction occurs. If multiple revenue centers exist, each revenue center may route payment information to a different bank. These banks can be grouped into merchant groups.
Thai Tax Rd Number	If applicable, enter the number to print on Thai Tax trailers.

4. Click **Save**.

Setting Offline Transaction Posting Time

When a property or its workstations are unable to communicate with the database for an extended period of time, transactions do not post. You can determine whether offline transactions post using the current time or the transaction time once communication resumes.

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Options** tab.
3. To allow offline checks to post to the database (when communication with the Check and Posting server is re-established) with the actual time of the transaction, select **6 - Post Offline Transactions with Actual Transaction Time**. Deselect this option to allow offline checks to post with the time that the check is uploaded into the database.
4. Click **Save**.

Configuring Workstation Security

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation record to open it.
3. Click the **Options** tab, and then click the **Display/Security** subtab.
4. Select the appropriate options:

Table 8-4 Workstation Security Options

Security Option	Description
Mag Card Entry Required for Employee ID	Select this option to require all employee identification (ID) entries at the workstation to use a magnetic employee identification card (for example, to sign on and authorize privileged operations). When you select this option, the workstation does not accept an employee ID number entered through the keyboard or touchscreen. Deselect this option to allow employee ID entery by either a magnetic card or by the keyboard or touchscreen.
Disable Employee Auto Sign Out	Select this option to if you do not want to use the **Automatic Operator Popup Interval** set in the RVC Parameters module. Deselect this option to sign out workstation operators after the **Automatic Operator Popup Interval** is reached.
Use Alternate ID for Sign-in	Select this option to allow workstation operators to sign on using a four-digit alternate ID number rather than a ten-digit employee ID number.
Fingerprint Scan Required for Employee ID	Select this option to require all employee ID entries at the workstation to scan a fingerprint. When you select this option, the workstation does not accept an employee ID number entered through the keyboard or touchscreen.
Employee ID or Fingerprint Scan Required for Employee ID	Select this option to require all employee ID entries at the workstation to scan a fingerprint or enter an employee ID through the keyboard or touchscreen. When you select this option, the workstation only accepts an employee ID number entered through the keyboard or touchscreen, or fingerprint scan.
Employee ID and Fingerprint Scan Required for Employee ID	Select this option to require all employee ID entries at the workstation to scan a fingerprint and enter an employee ID through the keyboard or touchscreen. When you select this option, the workstation only accepts an employee ID number entered through the keyboard or touchscreen and fingerprint scan.
Mag Card or Fingerprint Scan Required for Employee ID	Select this option to require all employee ID entries at the workstation to scan a fingerprint or swipe a magnetic card. When you select this option, the workstation only accepts either a magnetic card swipe or fingerprint scan.

Table 8-4 (Cont.) Workstation Security Options

Security Option	Description
Mag Card and Fingerprint Scan Required for Employee ID	Select this option to require all employee ID entries at the workstation to scan a fingerprint and swipe a magnetic card. When you select this option, the workstation accepts only a magnetic card swipe and fingerprint scan.

5. Click **Save**.

Changing the Appearance of Workstations

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Theme Assignment**.
2. Change the following settings:
   - **Default Theme**: Select the default theme for the workstations.
   - **Default Palette**: If you selected **Edge** as the Default Theme, select the color palette for the theme.
3. Click **Save**.

Configuring the Magnetic Stripe Reader on the Oracle MICROS Tablet 720

The Oracle MICROS Tablet 720 comes with a built-in OPOS Mag Stripe Reader (MSR).

1. In EMC, select **Property**, **Setup**, **Hardware/Interfaces**, **Workstations**, and then **Devices**.
2. In the **Peripheral Device Configuration** section, click **Add**.
3. For **Select Peripheral Device Type**, select **OPOS Mag Stripe Reader**.
4. For **Configuration**, enter `IDTECH_SECUREMAG_USBHID`.
5. Click **OK**, and then **Save**.

The *Oracle MICROS Tablet 720 Setup Guide* contains more information on setting up and using the Tablet 720.

Configuring the Barcode Scanner on the Oracle MICROS Tablet 720

The Oracle MICROS Tablet 720 comes with a built-in OPOS Barcode Scanner.

1. In EMC, select **Property**, **Setup**, **Hardware/Interfaces**, **Workstations**, and then **Devices**.
2. In the **Peripheral Device Configuration** section, click **Add**.
3. For **Select Peripheral Device Type**, select **OPOS Barcode Reader**.
4. For **Configuration**, enter `Honeywell`.
5. Click **OK**, and then **Save**.

The *Oracle MICROS Tablet 720 Setup Guide* contains more information on setting up and using the Tablet 720.

Allowing Employees to Install and Authenticate POS Clients and Service Hosts

In Simphony release 19.3 and later, you must allow administrator employees to download software, install, and authenticate clients and service hosts using CAL version 150 or later. After granting this privilege, employees can use their credentials to configure POS clients. In addition, the User Security Credentials configured in the Property Parameters module become inactive.

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Double-click an employee role.
3. Click the **Operations** tab, click the **Miscellaneous** subtab, and then select **10065 - Download Software, Install and Authenticate Clients and Service Hosts Using CAL**.
4. Click **Save**.

Using the Simphony POS Client and Mobile Solution Application on One Device

Your organization can run Mobile Solution 18.1 (used with Oracle Hospitality Inventory Management and Oracle Hospitality Materials Control) on a Simphony tablet device. To share applications on the device, you need to configure a button (using the Page Design module in the EMC) that closes the Simphony POS client on the device. (Minimizing Simphony does not release the scanner.)

After configuring the **Close Application** function button:

- When the device is powered on, the Simphony POS client starts automatically.
- The workstation operator must click the **Close Application** button to stop the Simphony POS client.
- The workstation operator must manually start the Mobile Solution application.
- After using Mobile Solution, the workstation operator must stop it.
- The workstation operator must manually start the Simphony POS client.

Configuring the Close Application Button

To configure a button that closes Simphony on the workstation:

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the close application button.
3. On the **Edit** tab, select the page area in which to define the button.
4. Click **Button** to add a button.
5. From the **Type** drop-down list, select **Function**.
6. Click the black arrow beneath the **Type** drop-down list.

7. In the **Name** field, enter `close`, select **Close Application** in the **Results** section, and then click **OK**.
8. On the **General** subtab, click the **Generate Legend** link.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Configuring an Alpha-Numeric Keyboard

The following steps describe how to configure an Alpha-Numeric Keyboard in EMC:

1. In Enterprise Management Console, select the property, click the **Setup** tab, and then click **Alpha-Numeric Keyboard** under the **Custom Content** section.
2. Insert a new record. Choose **Regular Alpha-Numeric** or **Small Screen Alpha-Numeric** from the template record drop down menu.
3. Add a name for the record, and then click **OK**.
4. In the list view, set the desired language from the **Language** drop down menu.
5. Click the **Options** button, and then ensure that the **Default keyboard for this language** option is enabled.
6. Double-click the record to enter page design view.
7. In page design, add the necessary buttons for the workstation. Ensure that the **Popup Alpha Numeric Keyboard** button is added. In addition to this, add a **Cancel** button to be able to exit in the workstation.
8. Click the **Save** icon to complete.

POS Clients Running Android Mobile Operating System

You can run Simphony release 2.7 and later on devices that have the Android mobile operating system. The Simphony POS client operates in a similar way on an Android mobile device and a Microsoft Windows device. You can configure the POS client using the EMC.

Oracle recommends using one revenue center per Android device, and a maximum of 10,000 menu item definitions.

The UI is the same on all devices and workstations. Android devices have special requirements to consider, including deployment method, configuration requirements, and the procurement process.

The *Oracle Food and Beverage Compatibility Matrix* contains more information about supported POS client operating systems.

Android Network Requirements

Android devices are connected wirelessly to Simphony using an 802.11x network. Therefore, it is vital that the property have a high quality wireless network. Spotty Wi-Fi coverage causes application performance issues with check sharing and posting, as well as bouncing between online and offline states with the services on property (for example, check and posting, printing and kitchen display) and the Enterprise, which impacts the ability to receive database updates.

You must configure the Android device to use a wireless local area network (WLAN) with connectivity to the local area network (LAN) used by the Check and Posting Service and other Simphony POS clients with which they might share checks. Simphony does not support the

use of a 3G or 4G connection through a telecommunications provider back to these local devices.

Oracle Hospitality recommends that you configure Android devices to use a static Internet Protocol (IP) address. Simphony does not support the use of Dynamic Host Configuration Protocol (DHCP) assigned addresses unless you define a DHCP reservation.

Android Payments

The Android clients support credit card processing and other forms of electronic payments.

The following drivers are supported with the Android mobile operating system:

- Oracle Payment Interface (OPI)
- Simphony Payment Interface (SPI)

The loadable Stored Value and Loyalty modules support Android clients, and are used with Oracle Hospitality Gift and Loyalty and with FreedomPay. The Xprocessor Extension Application, which is used for third party gift cards such as Givex, does not support Android devices.

Viewing and Editing Simphony Android Files

After installing Simphony on an Android device, you can use the Configuration Management Tool to view and edit certain files.

1. Launch the Simphony application on the Android device.
2. After the application loads, perform the following task on the Android device: On event (left swipe + right swipe + left swipe + tap + tap).
3. Enter the code based on the six-digit number shown at the top, and then tap **Sign In**. The Management Tool Home screen appears.
4. The following table lists the options and actions you can perform.

Table 8-5 Simphony Android Files

Option	Action
View web.config.txt	Tap to view and edit the web.config.txt file
View config32.web	Tap to view and edit the config32.web file
View Log	Tap to view the EGateway Log
View LogZone	Tap to view the LogZone_LoadHandlers.txt file, which is not editable
Ping Server	Tap to view the Server Name or IP Address
Delete DataStore	Tap to delete the DataStore database file and restart the application on the device
Copy DataStore	Tap to copy the DataStore database file within the device

Enabling a Third Party Mobile Device Management (MDM) to Distribute Simphony POS Client Software

Starting with Simphony release 19.4.2, you can use a third party Payment Service Provider (PSP) and its proprietary external Mobile Device Management (MDM) platform to distribute Simphony software to Android devices. The Third Party Managed Device option is only available for use with the following types of POS workstations:

- 1 - Mobile
- 2 - Workstation Client
- 6 - Tablet Client

1. Select the property, click **Setup**, and then click **Workstations**.
2. Select an Android workstation record that has **Type 1 - Mobile**, **2 - Workstation Client**, or **6 - Tablet Client**.
3. Click the **Options** tab, and then click the **Hardware/Cash Drawer** subtab.
4. Select **68 - Third Party Managed Device**.

   Enabling this option allows a third party PSP to ensure the device's CAPS and Service Host versions are compatible and in sync. When the option is enabled, if the device's CAPS version does not match the Service Host version, the customer is prompted to upgrade the Simphony application version on the device.
5. Click **Save**.

Viewing Android POS Client Logs on the CAPS Machine

When the Transfer Logs feature is enabled on an Android device using the Property Management Console (PMC) in POS Operations, the Oracle Simphony Support team can access the transferred Android POS client logs by connecting to a CAPS machine. This functionality allows log files to be retained on the CAPS machine for a longer time period than they may be available on the Android device due to limited storage. The Support team can easily access and view these logs on CAPS to troubleshoot Android device issues.

The Android log files are transferred to CAPS in .zip format.

To view logs that were transferred from an Android device, navigate to the POSClientLogs directory on the CAPS machine:

- Windows CAPS: `[Drive Letter]:\Micros\Simphony\WebServer\wwwroot\EGateway\WinGatewayLog\POSClientLogs`
- CAPS on IIS: `[Drive Letter]:\Micros\Simphony\IISCAPSServiceHost\EGateway\POSClientLogs`
- Linux: `/opt/oracle/simphony/webserver/wwwroot/Egateway/POSClientLogs`

The zipped Android log files have the workstation name, UTC time stamp, and local time stamp in the file name.

Wireless Signal Strength Threshold

Wireless devices occasionally behave unpredictably or inconsistently due to weak wireless signal strength or a flickering network, leaving the device in a state that is not consistently online or offline. To handle unstable network environments, you can configure the wireless network signal strength at which devices automatically go offline. Configure the wireless signal strength threshold for workstations that use a wireless network (tablet devices running the Microsoft Windows and Android mobile operating systems). Some devices may have both cable and wireless network connections; when docked, the device can use both network types. Disable this wireless signal strength feature when docking a device with a cable (wired) network.

You can define the wireless threshold settings from the following EMC modules:

- **Property Parameters**: The values are set at the property.
- **Workstations**: The workstation inherits the values from the property, unless overridden here.

Configuring Wireless Signal Strength Control Permissions

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type record (for example, administrator, manager or server).
3. Click the **Actions** tab, and then click the **Hardware** subtab.
4. Select the **Wireless Monitor** option.
5. Click **Save**.

Configuring the Wireless Signal Strength Threshold for Tablet Devices

1. Perform one of the following, depending on which level you want to configure or override:
   - To configure at the property level, select the property, click **Setup**, and then click **Property Parameters**.
   - To override at the workstation, select the property, click **Setup**, and then click **Workstations**.
2. On the **General** tab, in the Wireless Signal Strength Control section, enter information in the following fields:
   - **Offline Threshold**: Enter a number between 0 and 99 to represent the signal strength percentage at which devices go offline. Devices will go offline when the signal strength is at or below this percentage value. For example, if the **Offline Threshold** is set to 90 (90%), and the device's current signal is 89%, the device will go offline. When the signal is detected above 90%, the device reconnects online.
   - **Reconnect Threshold**: Enter a number between 0 and 99 to represent the signal strength percentage at which devices recover online after being in an offline state. Devices will go online when the signal strength is at or above this percentage value. For example, if the **Reconnect Threshold** is set to 80, and the device's signal strength is 85%, the device will go online.

   These values appear in a status bar on the POS client workstation.
3. Click **Save**.

9

Language Settings and Translation

Simphony allows you to translate the user interface to the local language and to maintain translation files for the EMC. You can configure up to four languages to appear on workstations, guest checks, and customer receipts. When a new language is configured for a property, all POS workstation clients must receive the new database updates and must restart prior to the changes becoming active. When the Translation CAL package is loaded, the POS workstation clients, including the CAPS workstation, need to be restarted upon receiving the language translation files.

Simphony upgrades earlier versions of translation files to later versions, and translates all languages defined in the system. You cannot translate core translation files as they are managed internally.

Configuring languages allows strings that have been translated to be presented to the user based on their language setting. You must manually translate menu items, touchscreen buttons, and user-defined strings in the EMC.

Adding Languages contains a list of all supported languages in Simphony.

Language Translation Configuration Tasks

Configuring language translation in Simphony consists of completing the following tasks:

Table 9-1 Overview of Configuring Languages

Task	Go To
Set the Translation Privileges	Configuring Translation Privileges
Create an Enterprise language entry	Adding a Language
Load translation file	• Loading Workstation Translations • Setting Languages in the EMC
Translate definition data	• Translating Menu Item Records • Translating EMC Records • Translating Touchscreen Buttons
Set languages for the property	Setting Languages for the Property
Assign languages to employees	Associating Languages to Employees
Set the default language for a workstation	Setting the Default Language for a Workstation
(Optional) Configure Simphony to print a secondary language on guest checks and customer receipts	Multiple Languages on Guest Checks and Customer Receipts
(Optional) Create touchscreen button to switch between languages on workstations	Configuring Screen Language Buttons

Configuring Translation Privileges

To enable privileges so that users can modify, import, or configure translations, perform the following steps:

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Actions** tab, and then select the appropriate privileges:

Table 9-2 Translation Privilege Settings

Privilege Name	Allows the Employee to...	Recommended Roles
EMC Text Translations	Import and modify the EMC related text files	Property expert
Workstation Text Translations	Import and modify workstation related text files	Property expert

3. Click **Save**.

Configuring Languages

Configuring languages as described in this procedure changes the user interface message language on workstations, and in the EMC for text labels, options, help text, and error messages. You must manually change the language for EMC records, menu items, and touchscreen buttons.

1. Select the Enterprise, click **Setup**, and then click **Languages**.
2. Insert a record and enter a name (for example, Spanish).
3. Double-click the record to open it.
4. On the **General** tab, select the language from the **Keyboard Type** drop-down list.
5. On the **Printing** tab, set the following options (if needed):
   - **Print Custom Numerals**: Select this option to print numerals defined in the **Custom Numerals** field on the **General** tab.
   - **Asian Characters**: Select this option for languages such as Chinese, Japanese, Thai, and Korean where characters are picture-based. When you select this option, characters print double-wide to make them more readable. The order device printer also prints the characters double-wide to maximize readability.
   - **Mapping Font**: By default, this option is set to **Amap** (used for Arabic). Select **Vmap** for Thai and Hebrew.
6. Click the **Miscellaneous** tab.
7. Select the language from the **Locale String** drop-down list. The following table lists all of the languages currently supported in Simphony.

Table 9-3 Supported Language Settings

Language	Locale String	Local ID	Language Culture
Arabic	Arabic-SaudiArabia	Arabic (Saudi Arabia)	ar-SA

Table 9-3 (Cont.) Supported Language Settings

Language	Locale String	Local ID	Language Culture
Chinese (Simplified)	chinese-simplified	Chinese (People's Republic of China)	zh-CHS
Chinese (Traditional)	chinese-traditional	Chinese (Taiwan)	zh-CHT
Danish	danish	Danish (Denmark)	da-DK
Dutch	dutch	Dutch (Netherlands)	nl-NL
English	english-us	English (United States)	en-US
Finnish	finnish	Finnish (Finland)	fi-FI
French	french	France (France)	fr-FR
German	german	German (Germany)	de-DE
Italian	italian	Italian (Italy)	it-IT
Japanese	japanese	Japanese (Japan)	ja-JP
Korean	korean	Korean (Korea)	ko-KR
Norwegian	norwegian	Norwegian (Norway)	nb-NO
Portuguese (Brazil)	portuguese	Portuguese (Brazil)	pt-BR
Portuguese (Portugal)	portuguese	Portuguese (Portugal)	pt-PT
Russian	russian	Russian (Russia)	ru-RU
Spanish	spanish	Spanish (Spain)	es-ES
Swedish	swedish	Swedish (Sweden)	sv-SE
Thai	chinese	Thai (Thailand)	th-TH
Turkish	turkish	Turkish (Turkey)	tr-TR

See https://docs.oracle.com/cd/E13214_01/wli/docs92/xref/xqisocodes.html for a more detailed list of language codes (not all of the languages listed on this website are supported by Simphony).

8. Select the **Local ID** from the drop-down list, and then enter the **Language Culture** corresponding to the language.
9. Click **Save**.
10. To configure translated text files for the workstation, see Configuring Workstation Translation Files.
11. To configure translated text files for the EMC, see Configuring the EMC Translation Files

Configuring Workstation Translations

Configuring Translations for Required Files

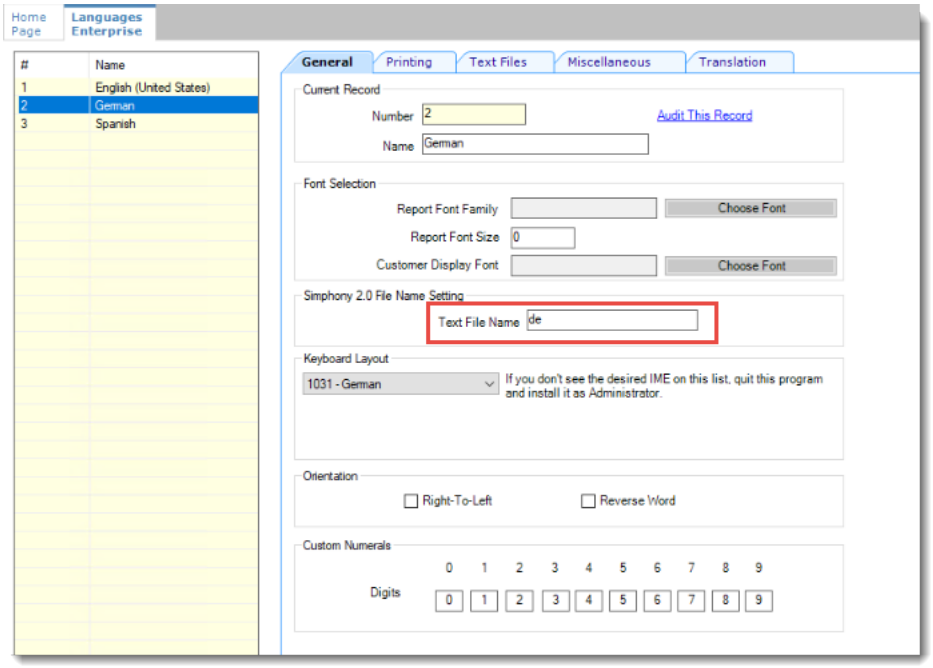
The following file types require translation configuration:

- OPS Text
- POS Core Text
- Payment Cash

To configure translated text files for required files:

1. Select the Enterprise, click **Setup**, and then click **Languages**.
2. Double-click the appropriate language record to open it.
3. Click the **General** tab, and apply the appropriate language abbreviation in the **Text File Name** field. Refer to the table of standard language abbreviations below these steps as an example.

Figure 9-1 General Tab

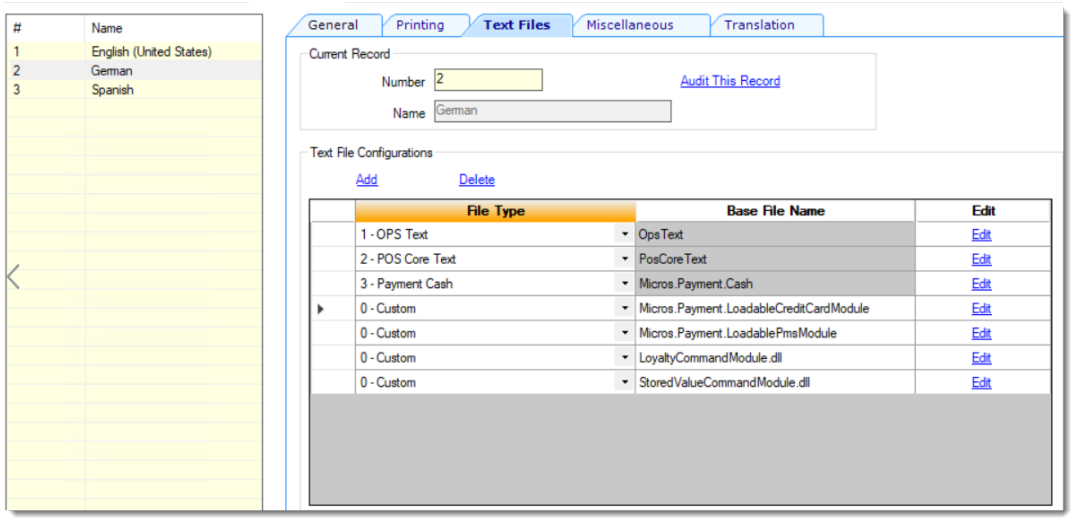


4. Click **Save**.

> **Note:**
>
> If you are using non-standard languages (that is, any language other than the 20 standard languages that are included with Simphony), proceed to the following steps.

5. Click the **Text Files** tab.

Figure 9-2 Text Files Tab



6. Click the **Add** link in the **Text File Configurations** section, and then select the file type from the **File Type** drop-down list.
7. Click the **Edit** link, and then click the **Import from a file** link.
8. Browse to the `[Drive Letter]:\MICROS\Simphony2\Tools\Translations` folder, and then select the file corresponding to your language. Use the following sample German translation text file names as an example:
   a. For an OPS Text file, select `OpsText_de.xml` to translate to German.
   b. For a POS Core Text file, select `PosCoreText_de.xml` to translate to German.
   c. For a MICROS Payment Cash file, select `MicrosPaymentCash_de.xml` to translate to German.
9. Click **Open**, click **OK**, and then click **Save**.

> **Note:**
>
> Text files uploaded to EMC are available to use for all client types.

Table 9-4 Sample Translation Files and Used Abbreviations for Language Settings

Language	Sample OpsText Filename	Abbreviation
English	OpsText.xml	No Abbreviation
German	OpsText_de.xml	de
Spanish	OpsText_es.xml	es
Italian	OpsText_it.xml	it
French	OpsText_fr.xml	fr
Danish	OpsText_da.xml	da
Dutch	OpsText_nl.xml	nl
Arabic	OpsText_ar.xml	ar
Portuguese	OpsText_pt.xml	pt

Table 9-4 (Cont.) Sample Translation Files and Used Abbreviations for Language Settings

Language	Sample OpsText Filename	Abbreviation
Finnish	OpsText_fi.xml	fi
Japanese	OpsText_ja.xml	ja
Korean	OpsText_ko.xml	ko
Norwegian	OpsText_no.xml	no
Portuguese (Brazil)	OpsText_pt_BR.xml	pt_BR
Russian	OpsText_ru.xml	ru
Swedish	OpsText_sv.xml	sv
Thai	OpsText_th.xml	th
Turkish	OpsText_tr.xml	tr
Chinese (Simplified)	OpsText_zh_CN.xml	zh_CN
Chinese (Traditional)	OpsText_zh_TW.xml	zh_TW

Configuring Translations for Custom Files

The following steps are required only for non-standard language users.

In addition to configuring the required translated files for POS client workstations and the EMC, you can also configure the translated text for the following custom files:

- Micros.Payment.LoadableCreditCardModule
- Micros.Payment.LoadablePmsModule
- LoyaltyCommandModule.dll
- StoredValueCommandModule.dll

To configure translated text files for custom files:

1. Select the Enterprise, click **Setup**, and then click **Languages**.
2. Double-click the appropriate language record to open it.
3. Click the **General** tab and set the language abbreviation. Refer to Step 3 from the previous section if you have not set your language abbreviation.
4. Click the **Text Files** tab.
5. Click the **Add** link in the **Text File Configurations** section, and then select **0 - Custom** from the **File Type** drop-down list.
6. Click the **Edit** link, and then click the **Import from a file** link. For standard language users, Simphony's preset translation files are automatically sent through the Service Host Download package.
7. Browse to the `[Drive Letter]:\MICROS\Simphony2\Tools\Translation` folder, and then select the custom text file corresponding to your language.

   For example, if you are adding a translation text file for StoredValueCommandModule.dll, browse to that folder in the Translations folder, and select the desired language. Use the following sample German translation text file name as an example:

   - `StoredValueCommandModule.dll_de.xml`

8. Click **Open**, and then click **OK**.
9. Repeat Steps 3 through 5 for each custom file.
10. Click **Save**.

Configuring Translation Files for Non-Standard Languages

The following steps apply to users who need to create a translation file for a non-standard language (that is, any language other than the 20 standard languages that are included with Simphony).

1. Select the Enterprise, click **Setup**, and then click **Languages**.
2. Create a custom language record by clicking the **Add** icon on the toolbar. Click **OK** to save the custom language record.
3. Click the **General** tab and set the language abbreviation in the **Text File Name** field. Refer to this site and find the appropriate language abbreviation in the **ISO 639–1 column**.
4. Click the **Translation** tab and select the desired **Text File Type**.
5. In the **Translated Text** column of the **Text Elements** section, manually translate each text element listed in the desired language. For example, if the non-standard language is Czech, manually translate each text element to its Czech equivalent.
6. After translating each text element, click **Export to a File** in the **Text File** section. The custom text file name is automatically generated from the text in the **Text File Name** field of the **General** tab. For example, when setting up a translation file for OPS Text in Czech, the file name displays as `OpsText_cz.xml` if the abbreviation was set to **cz**.
7. Navigate to the appropriate text file type folder, click **Save**, and then click **OK**.
8. The non-standard language translation file is now available for use when adding and importing in the **Text Files** tab.

Configuring the EMC Translation Files

When you add a new language or after the Simphony Cloud Service has been upgraded, you need to import the translation files for each local language you want to use or that you have configured.

To configure translated text files for the EMC:

1. Select the Enterprise, click **Setup**, and then click **Languages**.
2. Double-click the language record to open it.
3. Click the **Translation** tab.
4. To access a standard translation file:
   a. In the **Type** drop-down list, select **EMC Text**.
   b. Click **Import Standard Translation**.
   c. In the **Select translation** field, select the EMC Text file corresponding to the standard language, and then click **OK**.

      For example, select `EMCText_de.xml` for German.

      If you do not import a standard translation file, the system will use the default English (EMCText.xml). The default English text file does not appear in the list.
   d. The Import Summary Report shows the number of fields that were successfully imported from the application server. Click the **Exit** button.

The translated fields are listed in the Text Elements section of the Translation tab.

5. To manually import a translation file for each language used:
   a. In the **Type** drop-down list, select **EMC Text**.
   b. Click **Import from a File**.
   c. Browse to the `[Drive Letter]:\MICROS\Simphony2\EmcClient` folder, select the language translation text file, and then click **Open**.
   d. Click **Yes** in the Translation dialog to proceed.
   e. The Import Summary Report shows the number of fields that were successfully imported from the application server. Click the **Exit** button.

      The translated fields are listed in the Text Elements section of the Translation tab.
6. Click **Save**.

Translating Menu Item Records

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Use the filters to search for the items to translate, and then click **Search**.
3. To translate menu item master records, enter the translated text in the relevant language column on the **Master Records** tab.

   For example, to translate master records to Spanish, enter the translated text in the **Name - Spanish** column. Master records show a separate column for each language configured in the Enterprise.
4. To translate menu item definitions, click the **Definition Records** tab, and then enter the translated text in the relevant language column.

   Definition records show two extra columns per language, **First - [Language Name]** and **Second - [Language Name]**, to allow translations for the first name and second name of each definition.
5. Click **Save**.

EMC Record Translation

In the EMC, you can translate the name of any record into multiple languages using the Text

Translation dialog. This dialog is invoked by the Language Translation icon ( ) on the toolbar (or using the shortcut key F8). The Language Translation icon only becomes active when a translatable text field or a translatable table view cell is active in the module. This icon is dimmed if:

- Only one language exists in the Enterprise
- You do not have Edit access for the selected module

Translated text saves when the record itself is saved. Therefore, if you perform an undo operation on a record, record translations are also reverted.

Translating Touchscreen Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Open the page to translate, and then on the **Edit** tab, click the **Translate current item legend** () icon.
3. In the Edit Content Area Translated Text dialog, enter the translation for each button in the relevant language column.

   The dialog shows a separate column for each language assigned to the current property in Property Parameters. Each row in the grid represents a single touchscreen button.
4. Click **Save**.

Setting Languages for the Property

You can specify four languages that are available to be used in the property. Workstation operators can then switch between the four different languages on the fly, independent from the employee language settings. For example, if an employee has a different language assigned that what is configured for the property, the workstation operator will be prompted to select any of the available languages of the property upon first signing in to the workstation.

After configuring languages for a property, all POS workstation clients must receive the new database updates and must be restarted prior to the changes becoming active.

To configure the screen languages for the property:

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. On the **General** tab, select the default language from the **Language 1** drop-down list.
3. (Optional) From the **Language 2** through **Language 4** drop-down lists, select the secondary languages.
4. Click **Save**.

Setting the Default Language for Employees

You can configure the default language for employees, which appears on the following:

- POS Operations UI for the logged in workstation operator
- Workstation messages and prompts not configurable in the EMC
- PMC labels and ad hoc reports

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Employee Maintenance**.
2. Double-click an employee record to open it, change the default **Language** of the employee, and then click **Save**.
3. Repeat Step 2 for all employees.

Setting the Default Language for a Workstation

You can configure the language that appears on the POS UI Sign-In page.

Employees with a different language configured see their default language after signing in to the workstation.

The CAPS workstation requires the translation files, so the ad hoc reports for the workstation operator who is signed in show the report in the his or her assigned language.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click a workstation record to open it.
3. On the **General** tab, select the **Language** to appear on the workstation device, and then click **Save**.
4. Repeat Steps 2 and 3 for all workstations.

Configuring Screen Language Buttons

If more than one language is configured, you can create touchscreen buttons to allow workstation operators to switch between the languages.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the Front of House page on which to place the language buttons, and then on the Edit tab, select the page area in which to define the buttons.
3. Click **Button**, and then on the General subtab, select **Function** from the **Type** drop-down list.
4. Click the black arrow directly beneath the **Type** drop-down list, and then select **Multi Language** from the **Type** pane.
5. To allow workstation operators to select the preferred language from a list, select **Screen Language List**, and then click **OK**.
6. To configure separate touchscreen buttons for each language configured for the property, select **Screen Language 1**, and then click **OK**.

   Screen Language 1 shows the descriptors for the default language.
7. Enter a **Legend** for the button, and then position and size the button on the page.
8. If you are creating separate buttons for each language, repeat Steps 3 through 7 and configure buttons for the following:
   - **Screen Language 2**: Shows the descriptors for the second language defined in the system.
   - **Screen Language 3**: Shows the descriptors for the third language defined in the system.
   - **Screen Language 4**: Shows the descriptors for the fourth language defined in the system.
9. Click **Save**.

Multiple Languages on Guest Checks and Customer Receipts

You can show guest check detail and print a customer receipt showing both primary and secondary languages configured for the property. For example, English and Arabic can appear on the guest check detail area of the POS client and print on the customer receipt. When configured, all areas of the check show both languages, except the check number, table number and employee name and number. These fields print in the primary language.

Multilingual printing with Simphony is supported through the internationalized domain name (IDN) and ethernet interface. There is no need to change the default language setting for the printer. Each property in Simphony can be set up to support four languages at one time for multilingual printing.

Simphony version 2.7 and later supports printing custom numerals on a customer receipt (not in the check detail area of the POS client). For example, Arabic digits can print on the customer receipt rather than Latin digits.

Printing a Secondary Language on Guest Checks and Customer Receipts

To configure Simphony to print menu items in an alternate language beneath the default language on guest checks and customer receipts:

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. On the **General** tab, select a language from the **Select Secondary Print Language** drop-down list. Select **0 - None** to print only the default language.
3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
5. Click the **Options** tab.
6. Select **52 - Print Secondary Language on Guest Checks/Customer Receipt**.
7. Click **Save**.

Configuring Right to Left Reading Languages

To show guest check detail and print customer receipts and guest checks in the right to left orientation configured for a language (for example, Arabic and Hebrew), set the following:

- Enterprise Language
- Workstation Language
- Secondary Print Language

1. Select the Enterprise level, click **Setup**, and then click **Languages**.
2. Double-click the language record to open it.
3. To show the check detail area and customer receipt on the POS client and print in right-to-left orientation, select **Right-To-Left**.
4. To print Hebrew characters in the correct order, select **Reverse Word**.
5. Click **Save**.
6. Select the property, click **Setup**, and then click **Workstations**.
7. From the **Language** drop-down list, select the language to appear on the workstation.

   You can override the default language on the workstation for specific employees using the Employee Maintenance module. Employees with a different language configured in Employee Maintenance see that language after signing on to the workstation.
8. Click **Save**.
9. Select the property, click **Setup**, and then click **Property Parameters**.
10. From the **Language 1** and **Language 2** drop-down lists, select the primary and secondary languages.
11. From the **Select Secondary Print Language** drop-down list, select the language.

    To print only the default language, select **0 - None**. When printing multiple languages, the application prints item names in the order configured for the property.

12. Click **Save**.
13. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
14. Click the **Options** tab, and then select **52 - Print Secondary Language on Guest Checks/Customer Receipt**.
15. Click **Save**.

Creating a Print Language List Button

When printing multiple languages, you can have each workstation operator select the language from a list in the POS client using the Print Language List button.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Add a button to the appropriate screen with the function **Print Language List**.
3. Click **Save**.

Creating Print Language Buttons

The Print Language function allows the workstation operator to select a specific language. For example, if the secondary language is Arabic, the Print Language 2 button prints the customer receipt in Arabic. Follow these steps to create one or more Print Language buttons.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Add a button to the appropriate screen with the function **Print Language 2**. Depending on the number of languages, you can create other Print Language buttons (for example, **Print Language 3** and **Print Language 4**).
3. Click **Save**.

Copying Translations from One Language to Another

1. Select the Enterprise, click **Setup**, and then click **Languages**.
2. Double-click the appropriate language record to open it, and then click the **Translations** tab.
3. To copy all translations from another language, click **Copy All Translations**, select the language from which to copy, and then click **OK**.
4. To copy the translations for selected elements:
    a. From the Text Element section, select the relevant records, and then click **Copy Selected Translations**.
    b. Select the language from which to copy, and then click **OK**.
5. Click **Save**.

Exporting a Translation File

After you modify a language file, you can export it and then import it into another system.

1. Select the Enterprise, click **Setup**, and then click **Languages**.

2. Double-click the appropriate language record to open it, and then click the **Translations** tab.
3. Click **Export to a File**, and then browse to the desired local directory and save the file.

   The default file name appends the language to the end. For example, if the language is French, the exported default file name is `OPSText_French`.

10

Privacy and Personal Data Management

Before entering and storing the personal information of an employee in the system, consent must first be obtained. Consent can be denied, which stops you from entering a new employee record. You can enable or disable the prompt of the consent message. The prompt of the consent message applies for the Enterprise.

The consent notification message for an employee appears in the EMC at the Enterprise level when creating a new employee. If consent is granted, the personal information is entered in the Employee Maintenance module and stored in the application database.

The Audit Trail tracks and logs the user name of whomever is currently logged in (either in the EMC or workstation), and responds to the consent request for employees. Audit Trail contains more information.

Configuring Consent Messages

1. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **Data Privacy** tab.
3. Enter or paste the consent message for employees in the **Capture Consent Message** text box, and then click **Save**.

   The character limit for consent messages is unlimited. The default language is English and you must first enter the consent message in English. You can then enter the message in multiple languages (depending on the languages configured in the Languages module). The language tabs that appear are those configured for the Enterprise.
4. To enable the consent prompt, select **Enable Consent Capture**.

   If **Enable Consent Capture** is enabled, when an administrator adds a new employee, the configured consent message prompt appears in the administrator's language. The consent must be accepted to add a new employee. If consent is denied, the employee record cannot be created nor saved.
5. To disable the consent prompt, select **Disable Consent Capture**. The **Capture Consent Message** text box, and the **No Of Days to keep Employee PII Data** fields also become inactive.
6. In the **No Of Days to keep Employee PII Data** field, enter the number of days after an employee withdraws consent when the system de-identifies the employee's PII data. De-identifying deletes a person's personal data from the system.

   Removing Personal Data from Simphony contains more information about configuring de-identification.
7. Click **Save**.
8. If prompted with a consent message for bulk updates for existing employees, click **OK**.

   To deny the bulk updates for existing employees, click **Cancel**. The data is not saved.
9. To edit the consent message:
   a. Modify the message text, and then click **Save**.

If you modify the consent message, you are prompted with the option to trigger re-capturing of consent from users.

b. To present the updated consent message to all employees and require recapture of consent when employees log in to EMC, the workstation, the Engagement Cloud Service, or the Simphony Web Portal, click **OK**.

c. On the Consent status updated successfully dialog, click **OK**.

   The Employee Maintenance module shows all employee records and the **Is Consented** option is unchecked for everyone. After an employee logs in and agrees to the modified consent message, the **Is Consented** option becomes checked.

Withdrawing Consent

Before withdrawing an employee's consent, you must ensure that:

- **Enable Consent Capture** is selected in the Enterprise Parameters module. Configuring Consent Messages contains more information.
- The employee is in a deleted state. Deleting an Employee contains more information.

If an employee has withdrawn consent, they can be reactivated if the employee personal information has not been removed from Simphony. Consent must be asked again upon reactivation. See Removing Personal Data from Simphony for more information about de-identification.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Select **View Deleted Employees**, and then click the **Search** button to locate the employee record.
3. Right-click the employee record, and select **Withdraw Consent**.
4. In the Withdraw Consent confirmation dialog, click **Yes**. The employee's consent status is removed.
5. Click **Save**.

Removing Personal Data from Simphony

When you de-identify someone, their personal data is deleted from Simphony. The employee who withdrew consent in the system will have their records de-identified after a configured number of days. Simphony automatically runs a DTS job on a periodic basis to check for records eligible for de-identification; the default is every 12 hours.

After an employee has been de-identified, the employee cannot be reactivated.

1. To configure automated de-identification:
   a. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
   b. Click the **Miscellaneous** tab.
   c. In the DTS Jobs section, enter the **Interval** for the **Withdraw Employee Consent** job. This is the number of minutes between jobs. For example, if you enter `1`, the DTS job runs every minute.
   d. Click **Save**.
2. To manually de-identify an employee without using the DTS job:

a. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.

b. Search for the employee record with the **View Deleted Employees** option selected in the Search/Table View pane.

c. Right-click the employee record, and then select **De-identify Now**.

d. In the De-Identify Now confirmation dialog, click **Yes**. The employee's PII data is de-identified with a standard template.

11 Employees and Privileges

If you are using Oracle Hospitality Labor Management, you need to add employees using Labor Management. The *Oracle Hospitality Labor Management Cloud Service Feature Reference Manual*, located at the Oracle Help Center, contains information about adding employees in Labor Management. The initial employee information is sent from Labor Management to Simphony. To change the role for an existing employee, use the Simphony EMC.

In Simphony, privileges determine the activities an employee can perform, the EMC modules available to the employee, and the types of transactions the employee can process. You can configure privileges by the job role (for example, host, server, bartender, cashier, manager).

Creating Employee Roles

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Insert a record for the type of role (for example, host, bartender, server, manager, or administrator), and then click **OK**.
3. Double-click the role type.
4. On the **General** tab, select the role security from the **Level** drop-down list.

   Level 0 (zero) has greater privileges than level 9. The value in this field prevents EMC users from creating employee records with greater privileges than the administrator is granted. The following table describes typical levels for various types of roles. Gaps appear to allow flexibility for other types of roles that are not listed.

Table 11-1 Role Security Levels

Level	Type of Role
0	System Administrator
1	Enterprise Level Administrator
2	
3	
4	Property Level Administrator
5	
6	Property Floor Manager
7	
8	Bartender, Cashier, Server
9	

5. Click the **EMC Modules** tab.
6. For each EMC module listed in the File column, select one or more of the following privileges:

- **View**: Selecting this option grants access to view a module. You must select **View** so that employees in the role can open the module.
- **Edit**: Selecting this option allows employees in the role to update fields or records within a module.
- **Add**: Selecting this option allows employees in the role to add records to a module.
- **Delete**: Selecting this option allows employees in the role to delete records from a module.
- **Add Override**: Selecting this option allows employees in the role to override records in a module.
- **Allow Duplicate Obj#**: Selecting this option allows employees in the role to add menu item records where existing records with the same number exist elsewhere in the Enterprise.
- **Allow Duplicate Name**: Selecting this option allows employees in the role to add records where existing records with the same name exist elsewhere in the Enterprise.
- To easily configure a role to View, Edit, Add, Delete, or Add Override for every module without individually selecting each option, right-click a column heading and select **Set All**.

7. Click the **Actions** tab.
8. Select **Enable** for the appropriate EMC tasks listed in the Action column.

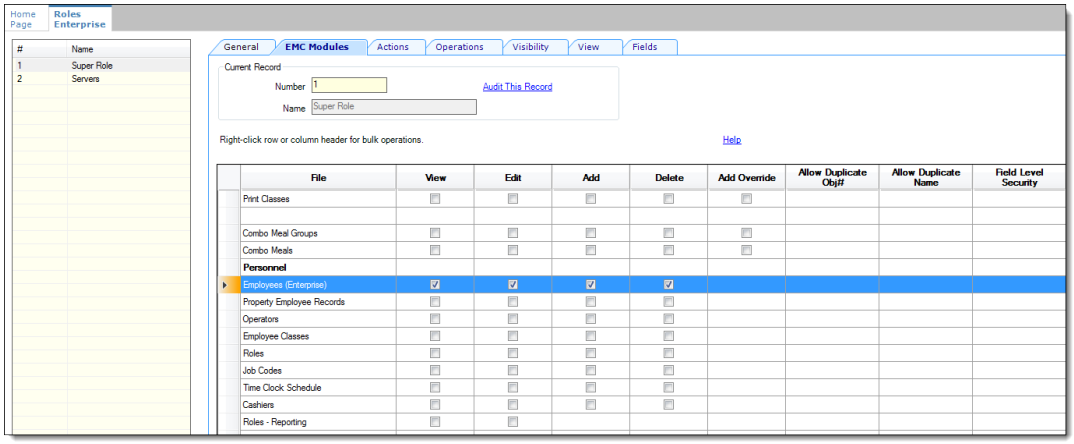
   To activate a role for every module without individually selecting each option, right-click the **Enable** heading, and then select **Set All**.
9. Click **Save**.

Configuring Access Privileges for Resetting a Password

To access and reset passwords for other users, you need to be assigned the appropriate privileges in the EMC.

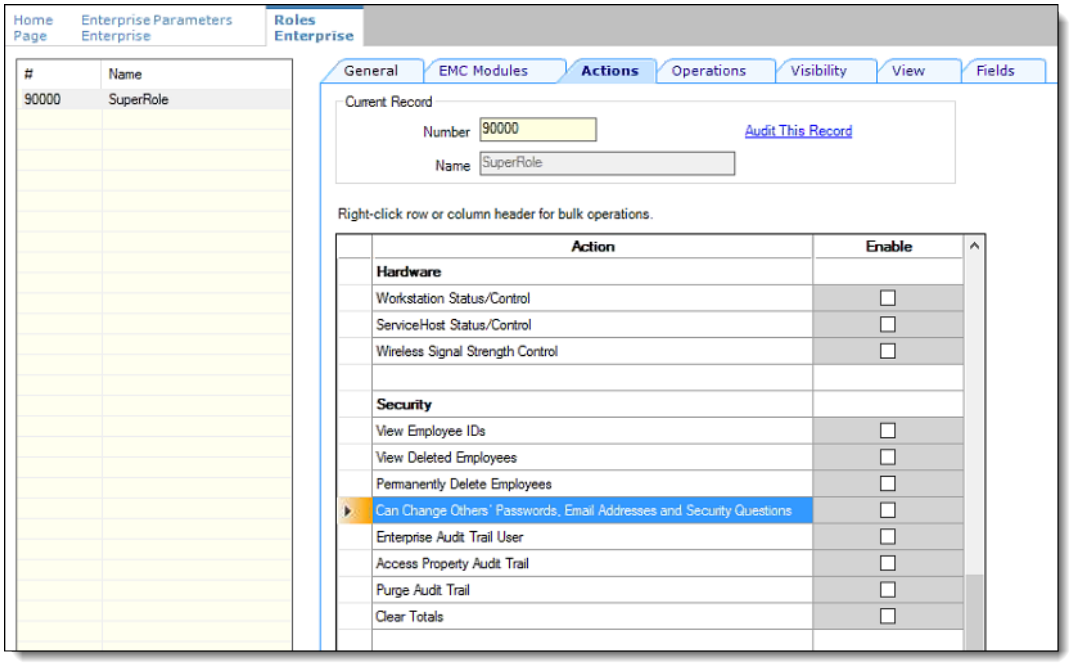
1. Select the **Enterprise**, click **Configuration**, and then click **Roles**.
2. Click the **EMC Modules** tab, and then scroll to the Personnel section.
3. Select the options for the **Employees (Enterprise)** access privileges for each of the following columns:
   - **View**
   - **Edit**
   - **Add**
   - **Delete**

Figure 11-1 Roles for EMC Modules



4. Click **Save**.
5. Click the **Actions** tab, and then scroll through the Action column until you reach the Security section.
6. Select the **Can Change Others' Passwords and Email Addresses and Security Questions** check box to enable the option, and then click **Save**.

Figure 11-2 Roles Actions Security Settings



7. Ensure that all users requiring Multi-Factor Authentication (MFA) configuration permissions are assigned a role that have these access privileges enabled.

Menu Item Field Security

EMC Employee Role privileges have been added so access to all of the fields within the Menu Item (MI) Master, MI Definition, MI Prices, Event Definitions, and Effectivity Groups files can be controlled more precisely. All current EMC and POS client access privilege controls remain

enforced. However, all of the fields within these files now have Editable, View Only, and Exclude privileges available for configuration. By default, all of the new field access levels are set to **Editable** (full access privileges).

EMC Configuration

To configure the Role's module Fields tab settings:

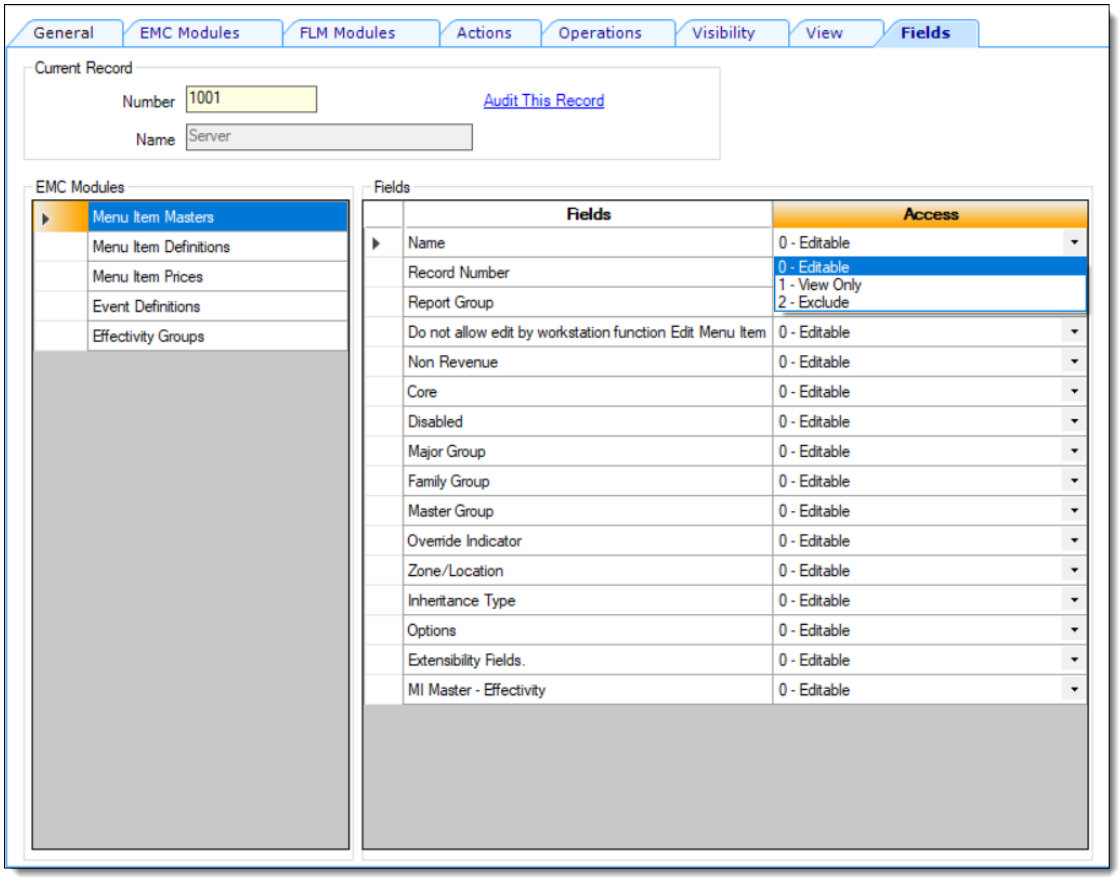
Access the EMC and select the **Enterprise**, **Configuration** tab, under Personnel, **Roles** module.

Select the **Fields** tab. You can set the access levels under the **Access** column.

Select the drop-down list to view the settings. The levels you have available are:

- 0 - Editable
- 1 - View Only
- 2 - Exclude

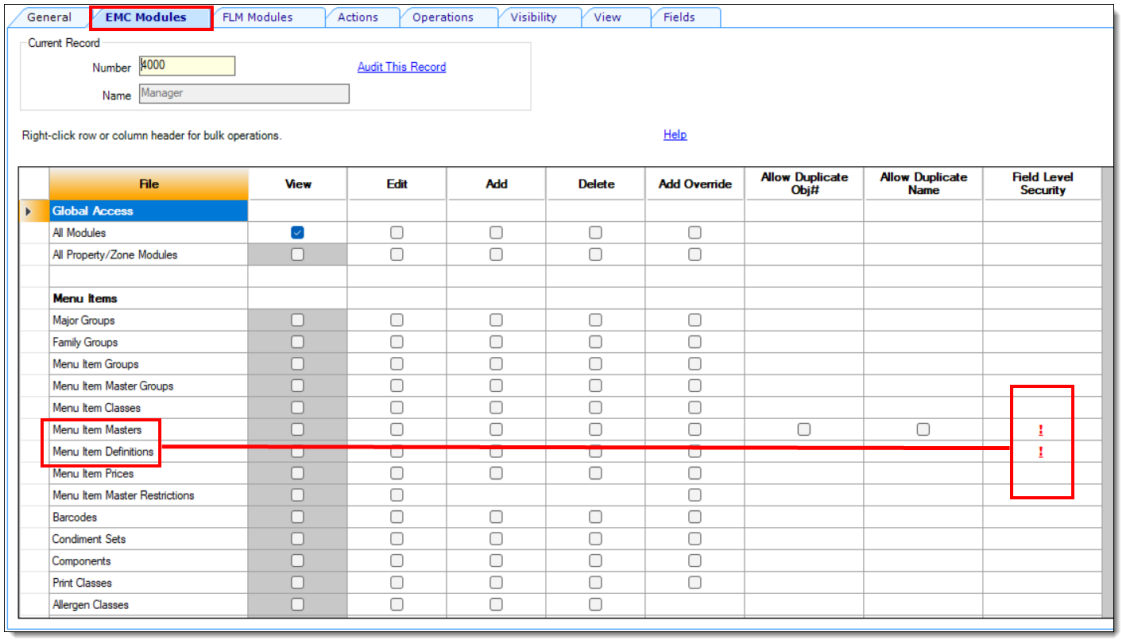
Figure 11-3 Roles Module 'Fields' Tab



From the same **Roles** module, when you select the **EMC Modules** tab, there is a column named **Field Level Security**. This column shows an indicator (**!**) when viewed from Table view if any of the access privileges located in the Fields tab have been set to the **View Only** or **Exclude** access settings.

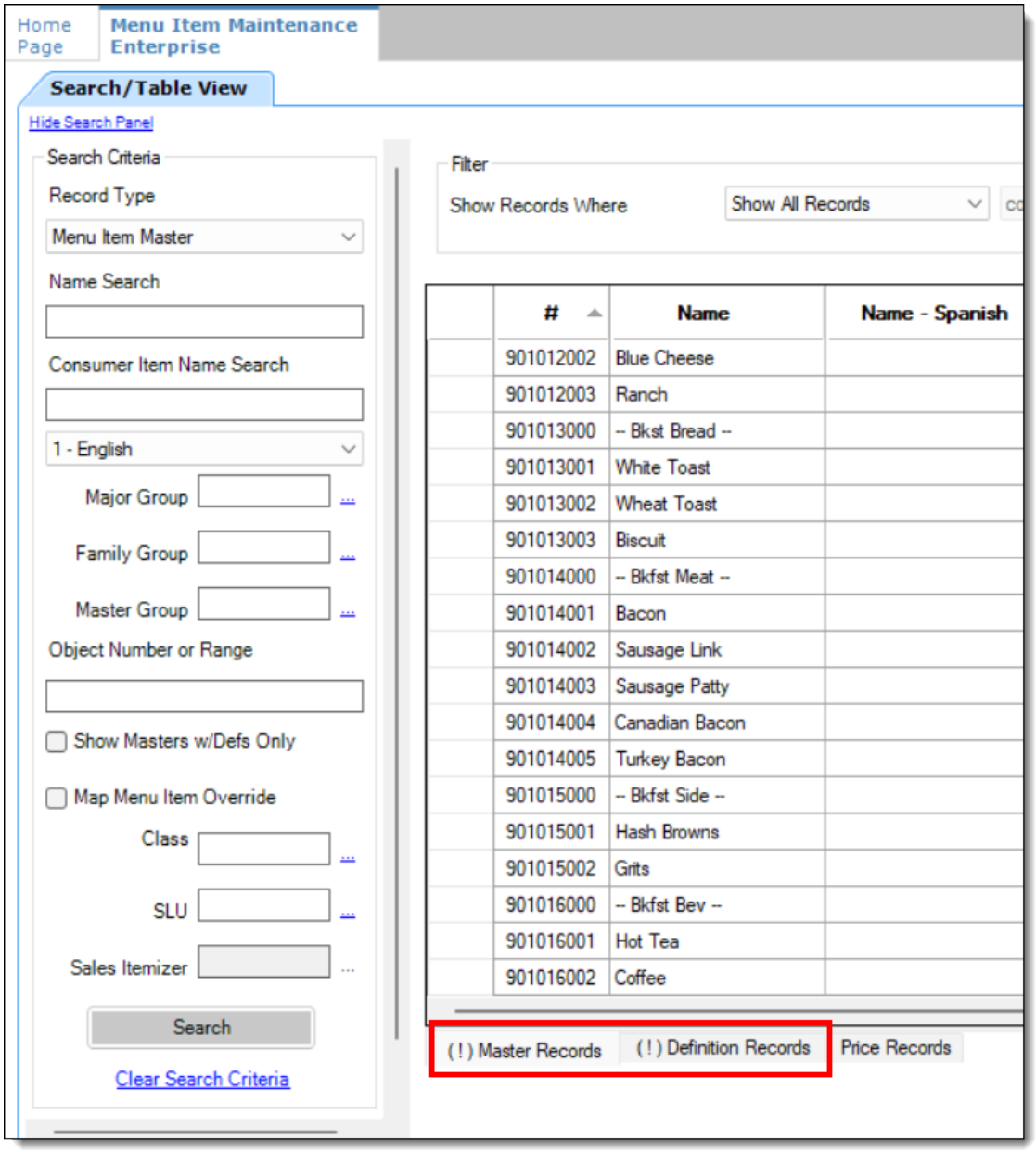
In the following example, the Manager role has been assigned **View Only** access privileges for the **Menu Item (MI) Masters** and **MI Definitions** modules.

Figure 11-4 Roles Module 'EMC Modules' Tab



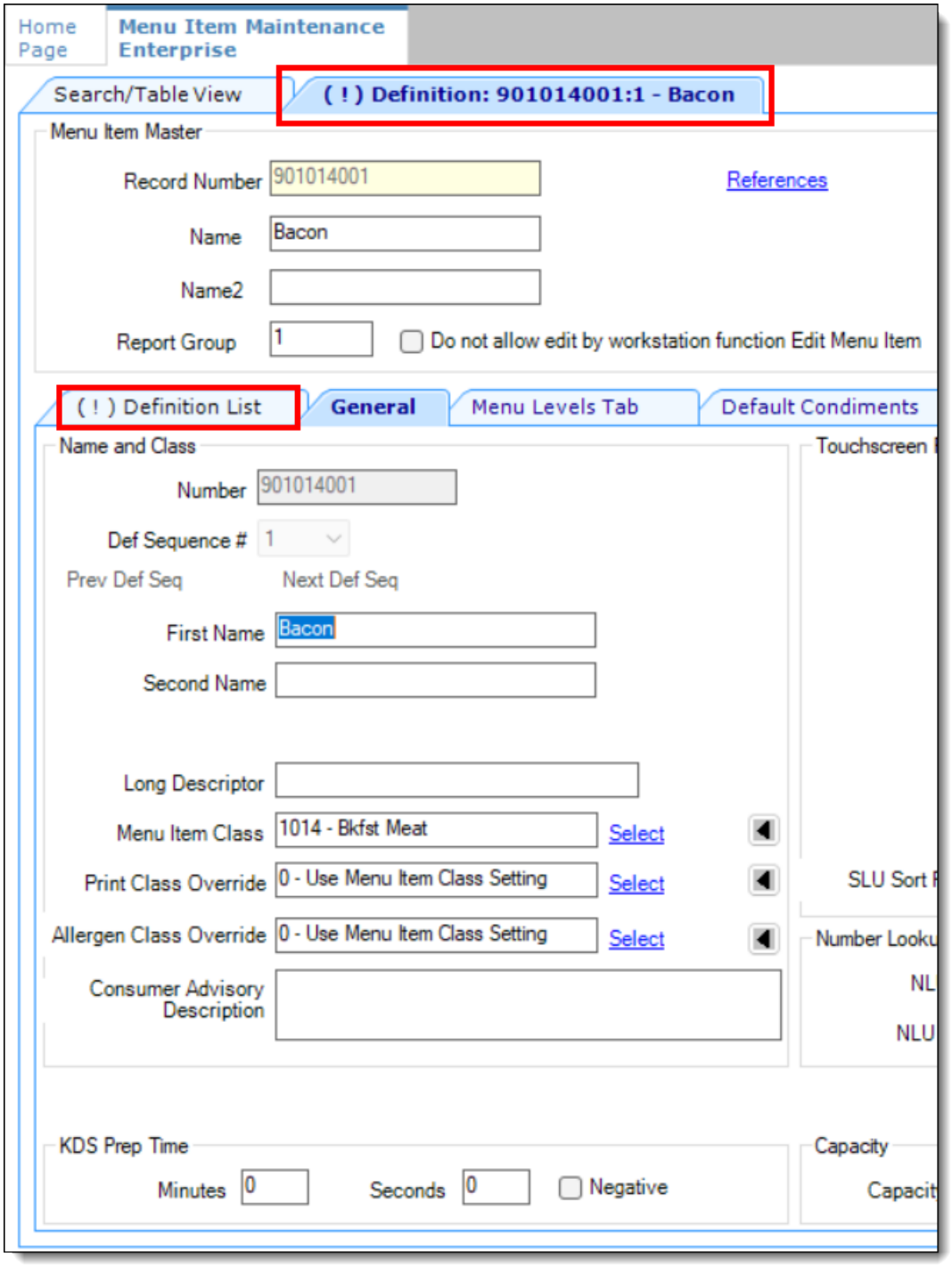
If you restrict access to users using the View Only or Exclude Field settings, the indicators (**!**) display on the tabs located in the MI Maintenance module while in Table view. Additionally, if users attempt to filter a search using an excluded field, the Filter becomes disabled.

Figure 11-5 Menu Item Maintenance Module - Restriction Indicators for MI Records



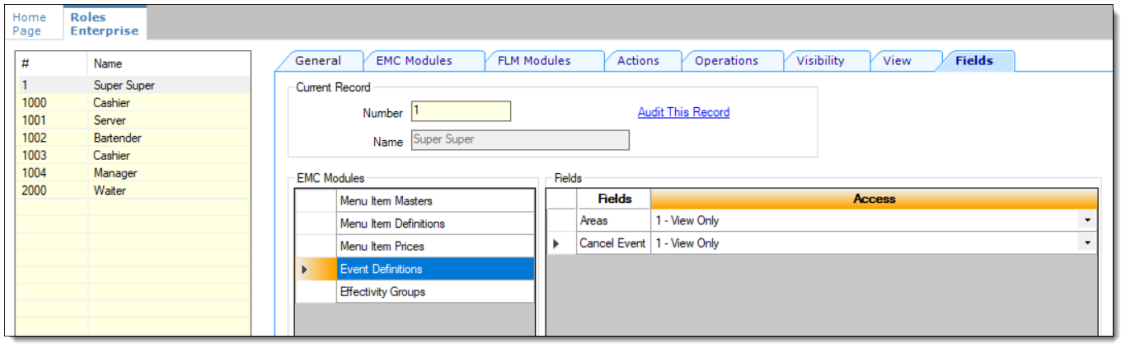
If you are in Form view from within the Menu Item Definition module, restriction indicators show on the record tabs as shown below.

Figure 11-6 Menu Item Definition Module - Restriction Indicators from Form View



When working with **Event Definitions**, if the Roles module Fields setting is assigned to View Only or Exclude, the fields from within the module are grayed out and non-configurable by the user.

Figure 11-7 Roles Module 'Fields' Tab - Event Definitions



The grayed out fields shown here are non-configurable based on the previous Fields tab configuration.

Figure 11-8 Event Definitions Module Showing Grayed Out Fields

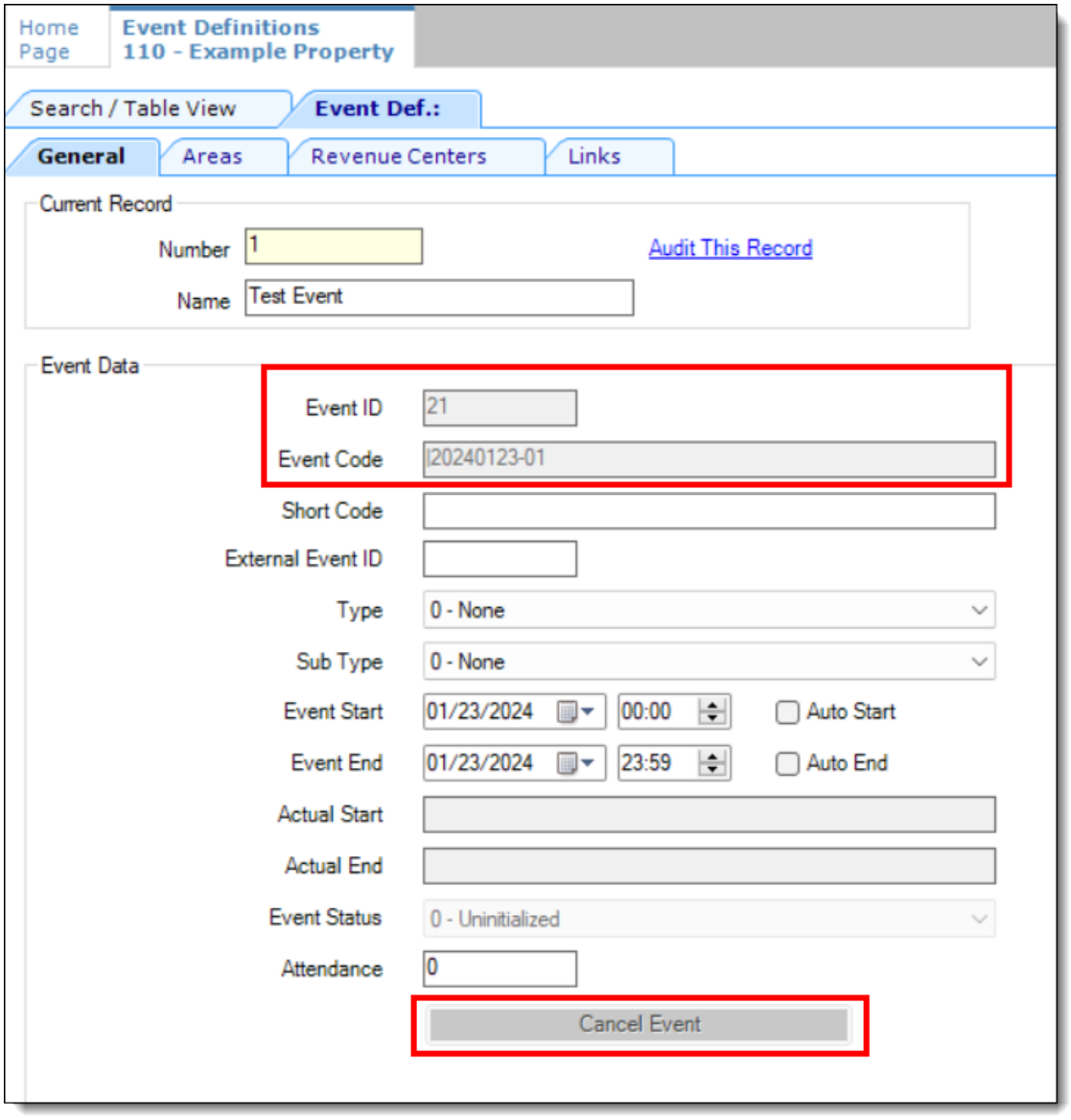
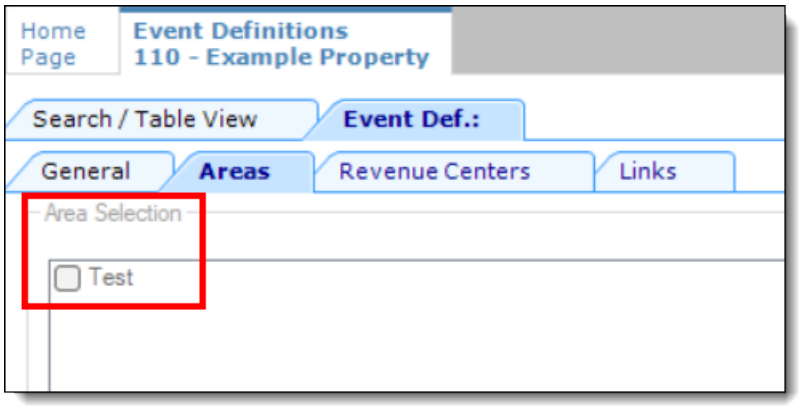
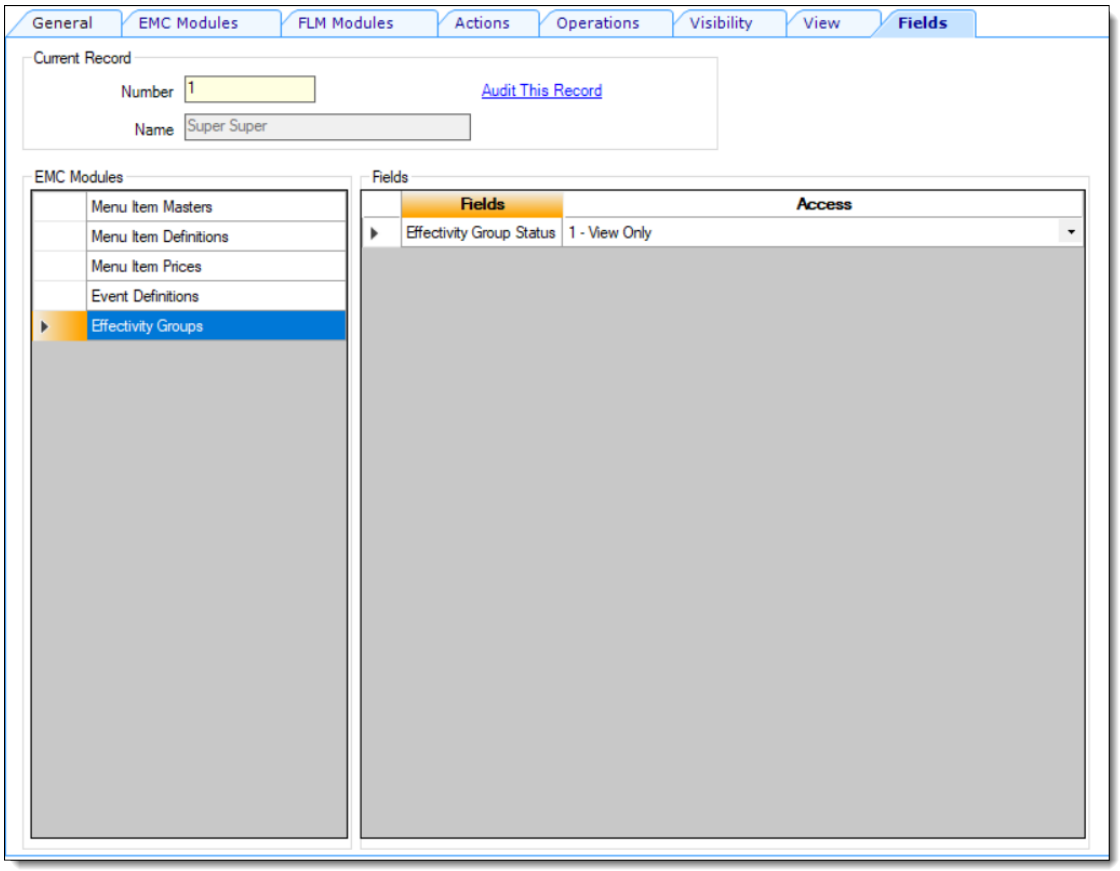


Figure 11-9 Event Definitions Module - Grayed Out 'Areas' Tab



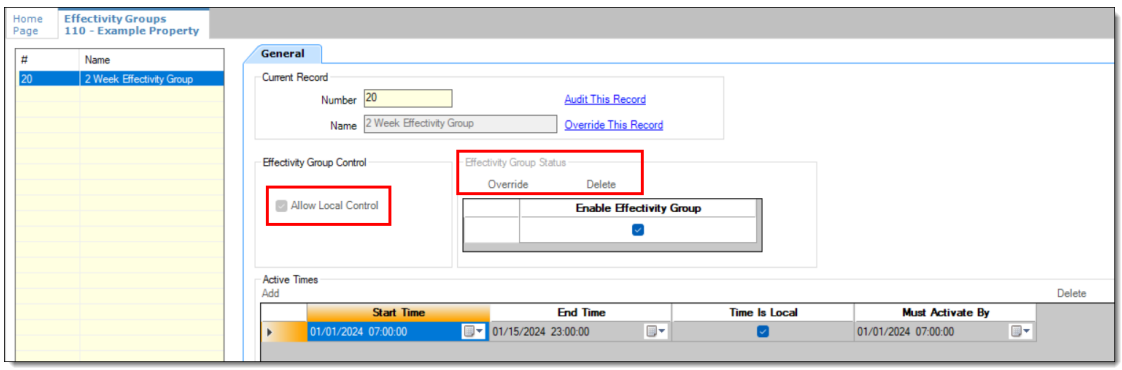
When working with **Effectivity Groups**, if the Roles module Fields setting is assigned to View Only or Exclude, the fields from within the module are grayed out and non-configurable by the user.

Figure 11-10 Roles Module 'Fields' Tab - Effectivity Groups



The grayed out fields shown here are non-configurable based on the previous Fields tab configuration.

Figure 11-11 Effectivity Groups Module Showing Grayed Out Fields



See *Creating Employee Roles* in the **Employees and Privileges** chapter for more information.

Creating Employee Classes

You can set collective options for a group of similar employee roles using an Employee Class. Each employee must belong to an Employee Class to perform workstation operations.

1. Select the property, click **Configuration**, and then click **Employee Classes**.
2. Insert a record for a group of employees (for example, server, bartender, or host), and then double-click the record to open it.
3. On the **General** tab, set information for the fields as described in the following table:

Table 11-2 Employee Class Settings

Field	Description
#Hours/Day Before OT	Enter the number of regular hours that employees in the Employee Class can work in a single day before being paid at the overtime rate.
#Hours/Period Before OT	Enter the number of regular hours that employees in the Employee Class can work in a single pay period before being paid at the overtime rate.
ISL Options	Select the **ISL Employee Options** to allow employees in the Employee Class to execute Interface Script Language (ISL) scripts. ISL is the Oracle Hospitality proprietary interpreted language used to create small programs called scripts. The ISL options act like a transaction privilege level in an ISL script. ISL scripts can be written to include variables that check for the presence of these privileges for the employee who is running the script. If the employee is not a member of an Employee Class that has the necessary ISL employee option set, the script does not execute, and a privilege prompt appears.
Default Trans TS	Select the default touchscreen that appears when members of the Employee Class sign on to a workstation.
MMH Default Trans TS	Select the default touchscreen that appears when members of the Employee Class sign on to a Mobile MICROS device.
Pickup/Add/Xfer SLU Style	Select a touchscreen style that workstation operators can use when adding and transferring checks with the **Add/Transfer Check Screen Lookup (SLU)** function key.
View Screen/Style Names for RVC	Select this option to view the screen names and styles set in the revenue centers.

4. Click the **Operator Options** tab.
5. For each revenue center listed, from the **Operator Type** drop-down list, select the guest check printing method for workstation operators assigned to the Employee Class.

- **By Round**: Select this option to print a guest check at the end of each service round, showing only the changes posted to the service round.
- **On Demand**: Select this option to print a buffered guest check after performing a Service Total or tender set to print an on demand check.
- **Temp On Demand**: Select this option to print a guest check on demand (in a by round manner).
- **Special By Round**: Select this option to print a guest check on demand for all rounds except the first round of a check. The first round always prints. Subsequent service rounds print if the Service Total is set to print an on demand check.

6. For each revenue center listed, select the appropriate **Options** for workstation operators assigned to the Employee Class, and then click **OK**.

   Using a Server Employee Class as an example, you can require all servers in a revenue center to enter the number of guests when beginning new checks and to enter table numbers.

7. Click **Save**.

Allowing Users to Override Employee Class Options

You can optionally override Employee Class configuration options for individual workstation operators.

1. Select the Enterprise, zone, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Select a property and revenue center, and then click **Search**.
3. Select **Operator Records**.
4. Select **Override Class Options** for an employee.
5. Select the override options.

Table 11-3 Override Employee Class Options

Option	Description
Options	When you select **Override Class Options**, the application automatically selects the Operator Options for the employee's revenue center. You can override option **25 - View Blind Totals** here.
Cash Management Accounting Method	When you select a Cash Management accounting method here for an employee, you override the accounting method set in the Employee Class module.
Cash Drawer	This option indicates the cash drawer that is defined for the workstation operator within the revenue center: 0 (no cash drawer assignment, user prompted), 1, or 2. The Quick Start till operation uses the defined cash drawer.

6. Click **Save**.

Adding an Employee

You must have the Enterprise level permission Add Employees to add an employee record from a template.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Click the Insert Record icon from the toolbar. The Add Employees dialog appears.
3. From the **Select a task to perform** drop-down list, select **Add Employee Record from Template**.

   Using a template simplifies the process of adding employees.
4. Click the **Select** link next to the **Employee To Copy** field.
5. From the Select Employee dialog, select a template employee record, and then click **OK**.
6. Enter employee information in the following fields, and then click **OK**.
   - **First and Last Name**
   - (Optional) **Check Name**: Enter the employee name to appear on guest checks (for example, Sally S).

     > **Note:**
     >
     > The system will not allow the following values to be used as an ID and Alternate ID:
     >
     > – **8700**
     > – **9700**
     > – **1234**
     > – **2211**
     > – **1212**
     > – **1550**

   - (Optional) **ID**: Enter the employee identification number.
   - (Optional) **Alternate ID**: Enter an ID to use instead of the Employee ID when signing into the workstation.
   - **Record Number**: The next available record number appears by default.
   - **Property # and Name**: The property where the employee works.
   - **RVC # and Name**: The revenue center (RVC) where the employee works.
7. Click **Yes** in the Add Employee confirmation dialog.
8. If prompted with the employee consent message, click **OK** to accept consent and save the new employee record.

   Click **Cancel** to deny consent. The Warning Data Privacy Declined dialog appears. If you click **OK**, the employee record is not created nor saved.

   When employee consent capture is enabled, the consent must be accepted to add a new employee.

9. To add another employee:
    a. Click **Yes** on the Item Added Successfully dialog (prompt to add another employee), and then repeat Steps 6 through 8
    b. When you are finished adding employees, click **No**.
10. Click **Save**.

Deleting an Employee

You must have the Enterprise level permission called Delete Employees to remove an employee record.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Search for the employee record.
3. Right-click the employee record, and then select **Delete**.
4. From the Delete Employee Records dialog, click **Yes** to confirm.
5. To view a list of all deleted employees in the search area, select **View Deleted Employees**, and then click **Search**.
6. To reactivate a deleted employee, right-click the employee record, select **Reactivate**, and then click **Yes** to confirm.

    After an employee has been de-identified, the employee cannot be reactivated because the employee's personally identifiable information has been deleted from Simphony and cannot be reconstructed. Removing Personal Data from Simphony contains more information about de-identification.
7. If you are an administrator and want to permanently delete an employee, right-click the employee record, select **Permanently Delete**, and then click **Yes** on the prompts to confirm.

    You cannot permanently delete an employee who is not marked **Is Deleted** and who has associated sales or timecard records in the Oracle Hospitality Reporting and Analytics database. Employees are mapped between the Simphony and Reporting and Analytics databases using the object number from the EMC. Consider the following example:

    - Employee 12345, Ted Davis, has $500 in sales
    - Employee 12345 is deleted from the database
    - If the EMC allowed this employee to be permanently deleted, a new employee, Mary Smith, could be added at employee record 12345 and the new employee would essentially start with $500 in sales

    Thus, the two-step employee deletion process preserves the object number between the two databases. Because of this potential scenario, object numbers are not reusable. If employee 12345 shows as **Is Deleted** in the database, you cannot create a new employee record using number 12345.
8. Click **Save**.
9. To withdraw an employee's consent, see Withdrawing Consent.

Changing Employee Information

You must have the Enterprise level permission Edit Employees to change an employee record.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Search for the employee record using the **Search Criteria** fields to limit the results, and then click **Search**. Depending on the hierarchy level at which you opened the Employee Maintenance module (Enterprise, property, or revenue center), the resulting list of employee records appears in one of the following tabs located near the lower area of the screen:
   - Employee Records – Enterprise level
   - Property Employee Records – Property level
   - Operator Records – Revenue Center level
3. Make changes in either table view or form view. To make changes in form view, double-click the object number of the employee record.
4. Change any of the information in the active fields. The following tables list the types of information you can change for each hierarchy level.

Table 11-4 Employee Records Information

Subtab	Type of Information
General	Allows you to change basic information about the employee, including name, language, identification numbers, level, group, email address, and EMC login credentials. **Note:** The Employee Access Level is not manageable from EMC when Labor Management is in use. When the Employee Access Level is changed in Labor Management, it is subsequently updated in Simphony.
Roles	Allows you to change the employee's role.

Table 11-4 (Cont.) Employee Records Information

Subtab	Type of Information
Reporting	In previous versions, this tab allowed you to change an employee's logon credentials for Oracle Hospitality Reporting and Analytics (R&A). **Note:** Beginning with the Simphony 19.1.2 release, when integrated with R&A version 20.1, Reporting User creation is no longer possible from the Simphony EMC because the Employee records **Reporting** subtab has been disabled. Moving forward, Reporting Users are only able to be created from the R&A version 20.1 application. It is still possible to add Reporting Users from Simphony when it is associated with R&A version 9.1. See the *Enterprise Back Office 20.1* documentation, specifically the Reporting and Analytics User Guide's Adding Users section for more information about adding users from R&A.
References	Shows the locations where the employee is being referenced (excluding workstations).

Table 11-5 Property Employee Records Information

Subtab	Type of Information
General	The **General** subtab allows you to change basic information about the employee, including name, employee class, revenue center, check name, email address, and clock-in options.
Job Codes	The **Job Codes** subtab shows the job code assigned to the employee in the property. You can change the **Regular and Overtime Pay Rates** for each job code.
Operators	The **Operators** sub tab shows each revenue center in the property where the employee has an operator record. You can change the **Cash Drawer**, **Table Count**, **TMS Color**, and **Server Efficiency**. You can also select whether to use the Employee Class options or set options at the operator level.

Table 11-6 Operator Records Information

Subtab	Type of Information
General	The **General** subtab allows you to change basic information about the employee, including name, employee class, revenue center, and clock-in options.
Job Codes	The **Job Codes** subtab shows the job code assigned to the employee in the property. You can change the **Regular and Overtime Pay Rates** for each job code.
Operators	The **Operations** subtab shows each revenue center in the property where the employee has an operator record. You can change the **Cash Drawer**, **Table Count**, **TMS Color**, and **Server Efficiency**. You can also select whether to use the Employee Class options or set options at the operator level.

5. Click **Save**.

Configuring Employee Shifts

A shift is the period of time that an employee is scheduled to work. Employees can volunteer or are scheduled to work more than one shift. Simphony provides the ability to post employee or cashier totals to shifts to account for the multiple shifts worked during a single business day.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
2. Click the **Options** tab, and then select the appropriate shift options.

Table 11-7 Shift Options

Option	Description
49 - Enable Shift Tracking	Select this option to activate shift reporting, segregating employee, employee tip, and cashier financial totals by shift. Deselect this option to accumulate employee, employee tip, and cashier totals in a single total set. When you deselect this option, the subsequent shift-related options are dimmed.
50 - Increment Cashier Shift when Clocking Out	Select this option to increment the shift for the cashier associated with the employee clocking out (except when clocking out on break). Deselect this option to have the shift for the cashier associated with the employee remain the same.
51 - Increment Cashier Shift when Clocking In	Select this option to increment the shift for the cashier associated with the employee clocking in (except when returning from break). Deselect this option to have the shift for the cashier associated with the employee remain the same.

Table 11-7 (Cont.) Shift Options

Option	Description
52 - Increment Cashier Shift when Changing Job	Select this option to increment the shift for the cashier associated with the employee when they clock in with a different job. This clock in occurs automatically when the employee signs on to a workstation with a different revenue center than the job in which they are currently clocked in. Deselect this option to have the shift for the cashier associated with the employee remain the same during this clock in cycle.
53 - Increment Cashier Shift when Changing Revenue Center	Select this option to increment the shift for the cashier associated with the employee when signing on to a different revenue center. Deselect this option to have the shift for the cashier associated with the employee remain the same when signing on to a different revenue center.
54 - Prompt before incrementing Cashier Shift	Select this option to prompt the employee to increment the shift for the cashier associated with the employee when the shift is set to increment upon clocking in or out, changing jobs, or changing revenue centers. Deselect this option so that no prompting occurs when the cashier shift is set to increment through one of those methods.
55 - Prompt to Increment Cashier Shift after Shift Report	Select this option to prompt the workstation operator to increment the cashier shift when a Cashier Shift Report is generated with a shift scope. Deselect this option so that no prompting occurs and the cashier shift does not increment.
56 - Increment Employee Shift when Clocking Out	Select this option to increment the shift for the employee upon clocking out (except on break). Deselect this option to have the shift for the employee remain the same.
57 – Increment Employee Shift when Clocking In	Select this option to increment the shift for the employee upon clocking in (except when returning from break). Deselect this option to have the shift for the employee remain the same.
58 - Increment Employee Shift when Changing Job	Select this option to increment the shift for the employee when clocking in with a different job. This clock in occurs automatically when the employee signs on to a workstation with a different revenue center than the job in which they are currently clocked in. Deselect this option to have the shift for the employee remain the same during this clock in cycle.
59 - Increment Employee Shift when Changing Revenue Center	Select this option to increment the employee shift when signing in to a different revenue center. Deselect this option to have the employee shift remain the same when signing in to a different revenue center.

Table 11-7 (Cont.) Shift Options

Option	Description
60 - Prompt to Increment Employee Shift after Shift Report	Select this option to prompt the workstation operator to increment the employee shift when an Employee Shift Report is generated with a shift scope. Deselect this option to set no prompting and leave the employee shift the same.
61 - Prompt before incrementing Employee Shift	Select this option to prompt the workstation operator to increment the employee shift when the shift is set to increment upon clocking in or out, changing jobs, or changing revenue centers. Deselect this option to set no prompting when the employee shift is set to increment through one of those methods.

3. Click **Save**.
4. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
5. Click the **Calendar** tab.
6. From the Shift Incrementing Options section, select the following options if you do not want Employee or Cashier Financial Shifts to reset with the start of business day:
   - **Do not reset Employee Financial Shifts with the start of each business day**
   - **Do not reset Cashier Financial Shifts with the start of each business day**
7. Click **Save**.

Configuring Employee Breaks

A break is a rest period for hourly workers, such as a lunch break. Breaks can be either paid or unpaid and you can set time limits for breaks. Some jurisdictions legislate break length requirements for minor employees.

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Timekeeping** tab, and then enter values in the following fields:
   - **Minor Unpaid Break Minimum Length**: If applicable, enter the minimum number of minutes allowed for unpaid breaks taken by a minor employee.
   - **Minor Unpaid Break Maximum Length**: If applicable, enter the maximum number of minutes allowed for unpaid breaks taken by a minor employee.
   - **Minor Paid Break Minimum Length**: If applicable, enter the minimum number of minutes allowed for paid breaks taken by a minor employee.
   - **Minor Paid Break Maximum Length**: If applicable, enter the maximum number of minutes allowed for paid breaks taken by a minor employee.
   - **Regular Unpaid Break Minimum Length**: Enter the minimum number of minutes allowed for an unpaid break taken by a regular employee.
   - **Regular Unpaid Break Maximum Length**: Enter the maximum number of minutes allowed for an unpaid break taken by a regular employee.
   - **Regular Paid Break Minimum Length**: Enter the minimum number of minutes allowed for a paid break taken by a regular employee.

- **Regular Paid Break Maximum Length**: Enter the maximum number of minutes allowed for a paid break taken by a regular employee.

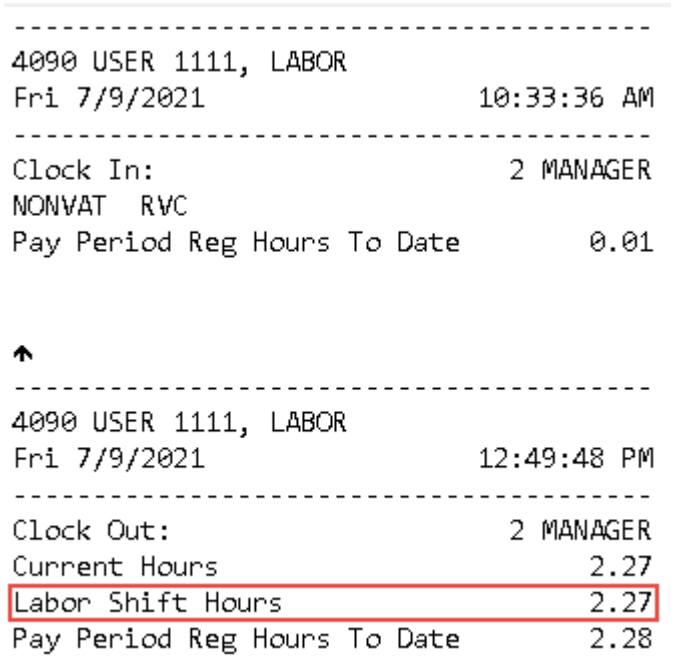
3. Click **Save**.

Configuring Time Card Chit Printing

You can print time card chits for an employee with the total hours worked per shift. The time card chit combines their regular hours with any overtime hours worked during a shift into a single total. The total labor hours worked are labeled **Labor Shift Hours** on the printout. The **Labor Shift Hours** label text cannot be translated.

The following figure shows an example of the printed time card chit with the **Labor Shift Hours** indicated in red.

Figure 11-12 Time Card Chit with Combined Labor Shift Hours



To configure printing for time card chits:

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Timekeeping** tab.
3. Select **Print Accumulated Labor Shift Total in Clock In/Out Chits**.

   When enabled, the system prints single labor shift total hours worked by employees on final clock-out chits for the shift.
4. Click **Save**.

Clock-In and Clock-Out Cycles

A clock-in cycle for a workstation operator includes one clock in and the subsequent clock out. Clock-in cycles are sequentially numbered from the start of the current payroll period to the

current date on employee time cards and labor detail reports. If breaks are not in use, a cycle is the equivalent of a work shift.

A clock-in cycle includes the day, date, and time of the entry and the Job Code under which the employee clocks in.

Setting Clock-In and Clock-Out Cycles

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Search for the property employee record.
3. Select the **Employee Records** tab near the lower part of the screen, and then double-click the object number of the appropriate record.
4. If the **ID** field is blank, enter the employee identification number.
5. Click the **Search/Table View** tab.
6. Click the **Property Employee Records** tab near the lower part of the screen, and then double-click the object number of the appropriate record.
7. Click the **Job Codes** tab and add a job code for the role if it does not exist.

   Employees who clock in require a job code. Employees without a job code assigned typically do not need to clock in (such as tax exempt employees). If an employee has more than one job code assigned (for example, bartender and server), the workstation prompts the employee to select a job code when clocking in.
8. Click **Save**.
9. Select the Enterprise level, click **Configuration**, and then click **Roles**.
10. Select the role type, click the **Operations** tab, and then click the **Timekeeping** subtab.
11. From the Job Rate Options section, select the appropriate **Clock in at Rate** options for employees associated with the role. Each rate number refers to a pay rate that is assigned for the employee record.
12. Click **Save**.

Declaring Tips

Tip declaration is a generic term that applies to direct tips and indirect tips.

Tip Track is a Simphony feature that involves declaration of indirect tips. Servers can use Tip Track to:

- Share tips with other employees
- Edit tip-outs
- Claim tips from other employees

Managers can use Tip Track to:

- Grant tip-out privileges
- Generate tip-out transaction reports

Configuring Tip Tracking and Reporting

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the type of role (for example, server or bartender).
3. Click the **Operations** tab, and then select the appropriate options as described in the following table:

Table 11-8 Tip Tracking and Reporting Privileges

Option Number	Privilege Name	Allow the Employee to...	Recommended Role
65	Authorize/Use the [Direct Tips] and [Indirect Tips] Keys	Use the Direct Tips and Indirect Tips function keys to declare cash tips received, and to authorize others to do so	Server
66	Authorize/Use the [Direct Tips] and [Indirect Tips] Keys for Another Employee	Use the Direct Tips and Indirect Tips keys to declare cash tips received by another employee, and to authorize others to do so	Manager
187	Authorize/Perform the Pay Tip Out To Others Keys	Give cash tips to others, and to authorize non-privilege employees to do so	Server
188	Claim Tips From Other Employee	Receive a tip from another employee	Server
189	Authorize/Perform Edit Of Any Tip Outs	Edit cash tips given to other employees, and to authorize non-privilege employees to do so	Manager
195	Allow Edit of My Tip Out	Edit tip outs	Server
303	Authorize/Perform a zero Direct Tip	Enter a $0 direct tip without requiring authorization to do so when clocking out	Manager
31010	Run Employee Tip Report	Run the Employee Tip Report	Manager
31045	Run Employee Tip Track Report	Run the Employee Tip Track Report	Manager

4. Click **Save**.
5. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
6. Click the **Options** tab.

7. To print a validation receipt when a tip-out or tip edit operation occurs, select **7 - Validate Employee Direct/Indirect Tips Declared Transactions**.
8. Assign a validation printer at the property level:
    a. Select the property, click **Setup**, and then click **Workstations**.
    b. Click the **Printers** tab.
    c. Select a **Validation Printer**, and then click **OK**.
    d. Click **Save**.

Configuring Tip Track Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place tip track buttons.
3. On the **Edit** tab, select the page area in which to define the tip track functions.
4. Click **Button**.
5. On the **General** subtab, enter the button name **Tip Track Tip Out** in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, select **Tips** from the Type section, select **Tip Track Tip Out** from the Results section, and then click **OK**.
8. Repeat Steps 3 through 7 to create the following buttons:
    - **Tip Track Edit My Tips**
    - **Tip Track Edit**
9. Click **Save**.

12

Payments and Currency

Guests pay guest checks with various types of payments or tenders, ranging from paper to plastic to digital.

Types of Payment

Payments reduce the balance of the guest check, and can include the types listed in the following table:

Table 12-1 Payment Types

Payment Type	More Information
Cash	Configuring the Cash Tender
Credit Cards	The Oracle Payment Interface (OPI) The Simphony Payment Interface (SPI)
Gift Cards	Stored Value Configuration Tasks
Pay at the Table	Pay@Table
Hotel Room Charge	Configuring the Room Tender

Configuring Currency

You can configure the types of currencies in circulation for exchange at workstations.

Oracle Food and Beverage recommends to use Currency ISO standard 4217 in the Currency module's Abbreviation field. For example:

- USD for the US Dollar
- CAD for the Canadian Dollar
- EUR for the Euro
- GBP for Pound Sterling
- MXN for the Mexican Peso
- JPY for the Japanese Yen

> **Note:**
>
> The currency **Abbreviation** field is where the currency type is pulled from by the Simphony Transaction Services (STS) Gen2 API.

1. Select the Enterprise, property, or zone, click **Setup**, and then click **Currency**.
2. Insert a record, enter the name (for example, US Dollars), and then click **OK**.

3. Double-click the record to open it.
4. Enter the **Abbreviation** for the currency (for example, USD).
5. Enter the **Symbol** for the currency record (for example, $).
6. Select the **Number of Digits** from the drop-down list.

   This is the number of digits after the decimal point that the currency allows.
7. Enter the **Smallest Bill Amount** for the currency (for example, 1).
8. Select **1 - On = Print Symbol After Total; Off = Print Symbol Before Total** to print the currency's symbol after the amount due on guest checks and customer receipts. Deselect this option to print the currency's symbol before the amount due.
9. Select **5 - Use Thousands Separator Character** to use the thousands separator (comma as in the example 1,000) when numbers are printed.
10. Click **Save**.
11. Repeat Steps 2 through 10 for each currency payment allowed.

Configuring Base Currency and Alternate Currency

1. Select the Enterprise, property, or zone, click **Setup**, and then click **Currency Parameters**.
2. Select the **Base Currency** from the drop-down list. This is the primary currency for the location.

   Oracle recommends setting the base currency once during initial configuration of a property, prior to opening guest checks. When you change the base currency after opening checks, the EMC prompts you for verification twice.
3. (Optional) Select the **Alternate Currency** from the drop-down list.

   This is the other currency used at the location. For example, a property located near Niagara Falls might set US Dollars as the base currency and accept Canadian Dollars as the alternate currency.
4. To use rounding, select **4 - Round Currency**. Selecting this option activates the subsequent options. Select the appropriate options to round the amount due:
   - **5 - ON = Round to Nearest 0; OFF = Round to Nearest 5**: Select this option to round currency amounts to the nearest 0 (for example, 163.336 rounds to 163.340). Deselect this option to round currency amounts to the nearest 5 (for example, 163.336 rounds to 163.335).
   - **6 - ON = Round to Second-Least Significant Digit; OFF = Round to Least Significant Digit**: Select this option to round currency amounts based on the second least significant digit (for example, in 100.45, the second least significant digit is 4). Deselect this option to round currency amounts based on the least significant digit (for example, in 100.45, the least significant digit is 5).
5. Click **Save**.
6. Select the Enterprise, property or zone, click **Setup**, and then click **Currency Availability**.
7. If you selected the Enterprise level, for each record, select the non-base currency (foreign or alternate currency) for conversion in the **Currency** field.
8. Select the appropriate alternate currency options:
   - **2 - Issue Change In Other Currency**: Select this option to issue change from a currency conversion in the currency. Deselect this option to issue change only in the base currency.

- **3 - Prompt For Issuing Change**: Select this option to ask the workstation operator with a **Yes**/**No** prompt whether change is required in the alternate currency. Deselect this option to issue change only in the base currency without prompting.
- Select options **4**, **5**, and **6** as appropriate for the alternate currency. These options are described in Step 4.

9. Click **Save**.

Configuring Currency Conversions

You can configure the manner in which one currency rate converts to another currency rate. Typically, currency conversion rates are set at the Enterprise level, and each property receives the same conversion. If one location has a slightly different conversion rate for the same two currencies, you can set the currency conversion at the zone (for example, a Euro-to-US Dollar conversion might be standard for the Enterprise level, while an airport property has a different rate).

1. Select the Enterprise, property or zone, click **Setup**, and then click **Currency Conversions**.
2. Insert a record. Each record contains two currencies: a Currency and a Conversion Currency.
3. Click the ellipsis point (...) button from the **Currency** column, select the currency, and then click **OK**.

   This field, divided by the Rate, determines the number of Conversion Currency records.
4. Click the ellipsis point (...) button from the **Conversion Currency** column, select the conversion currency, and then click **OK**. You must select a different currency than the selection in the **Currency** field. That is, the **Currency** and **Conversion Currency** fields cannot contain the same values.

   This field, multiplied by the Rate, determines the number of Currency records.
5. Enter the conversion **Rate**.

   The Rate determines how Simphony calculates the Currency and Conversion Currency. The Conversion and Conversion Reverse fields calculate automatically to show additional information about the record.
6. Click **Save**.

Configuring the Cash Tender

You must configure a cash tender to allow guests to pay the check with cash.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Payments**.
2. Insert a record, enter **Cash** as the name, and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers, select **Micros.Payment.Cash.dll**, and then click **Open**.
6. Click the **Configuration** tab, and then click the **Module Configuration** subtab.
7. Enter information in the following fields:

Table 12-2 Module Configuration Fields

Field	Description
Module ID	Enter **MicrosCashPaymentModule**.
Description	Enter a description for the payment driver (for example, MICROS Cash Payment Module).
Do Not Batch	Select **False**.
Run As Service	Select either **True** or **False** to indicate whether to run the MICROS Cash Payment Module as a Service Host service. Select **False** to run the cash module directly on the POS client.
Show Change Due Dialog	Select **True** to show the Change Due dialog on the POS client.

8. Click **Save**.
9. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
10. Insert a record, name it **Cash**, and then click **OK**.
11. Double-click the **Cash** record to open it.
12. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
13. Select the **Print Class** to associate with the cash tender.

    Print Class Output contains more information.
14. Click the **Options** tab, and then click the **Printing Options** subtab.
15. Select **8 - Print Customer Receipt** and **21 - Print Summary Totals**.
16. Select the **Ops Behavior** subtab, and then select the appropriate Amount Options as described in the following table:

Table 12-3 Amount Options

Option	Description
2 - Amount Required	Select this option to require an amount when using the cash tender. If the workstation operator presses the cash tender button at the POS client without entering an amount, the POS client prompts to enter the tender amount. If you deselect option **2** and select option **3**, the tender is used for 0.00, unless the workstation operator enters an amount before pressing the tender key.
3 - Assume Paid in Full	Select this option to record the exact amount due as the entry. You must also deselect option **2**. If you deselect both options **2** and **3**, the system records 0.00 as the entry.
4 - Use with Currency Conversion	Select this option to post payment amounts entered through a currency key to the cash payment key.
37 - Partial Tender Not Allowed	Select this option to prevent the cash tender from being used to partially tender a transaction.

Table 12-3 (Cont.) Amount Options

Option	Description
53 - Round Tender to Next Highest Dollar	Select this option to round the cash tender up to the next highest whole number dollar amount. Options **53**, **3**, and **56** work together; to enable option **53**, you must also select options **3** and **56**. In addition, option **2** must be deselected. In this scenario, the Change Due will always be 0.00 and the rounding value will show the difference. In Page Design, you must configure the **Payment Type** as **Cash:Cash** and the **Function** as **Default** in the Payment Configuration dialog when configuring the Cash payment tender button. Partial tenders are allowed when Amount Options **3**, **53**, and **56** are enabled, when the **Payment Type** is **Cash:Cash** and the **Function** is **# (DollarUp)** in the Payment Configuration dialog when configuring the payment tender button in Page Design. Partial Tenders are not allowed when option **37** is enabled. (The message "Tender must be made in full" will appear when option **37** is enabled). Adding Payment Keys to the Transaction Page contains more information.
56 - Round Change Due	Select this option to accept payments for the exact amount and to round change due. Selecting option **56** overrides option **87**.
87 - Rounded Payments and Change	Select this option to round change due resulting from an overtender.
88 - Round Payments and Change To the Nearest 0	Select this option to round the payment total or change due to the nearest 0 or 10. You must also select one of the following options: • **56** • **87** If you select option **88**, the least significant decimal digit is rounded to 0 or 10. Deselect option **88** to round the least significant decimal digit to 0 or 5. Tender/Media Amount Options **53** and **88** are mutually exclusive; you cannot select both.
96 - Round To Second Least Significant Digit	Select this option to round the payment total or change due to the nearest .50 or 1.00. You must also select one of the following options: • **56** • **87** If you select option **88**, the payment total and change due are rounded to the nearest 0. With option **96** enabled, it is rounded to the nearest .00. If you deselect option **88**, the payment total and change due are rounded to the nearest 0 or 5. With option **96** enabled, it is rounded to the nearest .00 or .50.

Table 12-3 (Cont.) Amount Options

Option	Description
97 - Round Change Due Down	Select this option to round change due down when the unrounded change is exactly half of the rounding number. For example if the payment given is .25 greater than the amount due, and rounding is to the nearest .50, the change due will be 0 instead of .50. Select option **97** to round the change due down. Deselect option **97** to round the change due up.

17. If the workstation that accepts cash payments is assigned to a cash drawer, select **1 - Open Cash Drawer** in the Hardware Options section.

    This option is ignored if you select **23 - Open Drawer Only if Balance Due is 0.00** in the Control Parameters module for the revenue center. You can override these settings for transactions that do not change the transaction balance from 0.00, by selecting **36 - Do Not Open Drawer if Subtotal is 0.00** in the Control Parameters module for the revenue center. Configuring a Cash Drawer contains more information.

18. Click **Save**.

Adding Payment Keys to the Transaction Page

You can create payment keys for each type of payment tender (for example, Cash, Auth, Auth and Pay, Final Authorization, and Split Tender).

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the Front of House page (typically the Transaction page) on which to place the payment buttons.
3. On the **Edit** tab, select the page area in which to define the payment buttons.
4. Click **Button** to add a button.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. From the **Type** drop-down list, select **Payment Tenders**.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select the tender payment type, and then click **OK**.
9. From the Payment Configuration dialog, select the **Payment Type**, and then click **OK**.
10. Position and size the button on the page. Use the Style arrow to change the color.
11. Click **Save**.

Configuring a High Amount Lockout (HALO) for Tenders

High Amount Lockout (HALO) is a set limit on the dollar amount of menu items or tenders that may be entered by the workstation operator. A HALO is used to filter out erroneously high entries.

When a Tender/Media HALO is active, dollar amount entries are compared to the HALO amount. The HALO may be configured to limit either the tender amount entered or the amount over tendered.

Authority to override a Tender/Media HALO may be restricted to certain employees.

When a menu item HALO is active, the quantity of the item ordered times the item price is compared to the HALO amount. For example, if a menu item is priced at $3.00, and the HALO for this menu item class is set at $30.00, then ordering 11 of these menu items would exceed the HALO amount (11 x $3.00 > $30.00).

If the HALO is exceeded in an entry, the workstation prompts “AMOUNT TOO LARGE-CONTINUE?”. The operator may then change the entry or continue with the large amount.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Double-click a record to open it in form view.
3. Click the **Options** tab, and then click the **Miscellaneous Options** subtab.
4. To require authorization to exceed the HALO, select **18 - Enable HALO**.
5. To compute the HALO for this Tender/Media on the amount entered, select **19 - On=Use HALO on Amount Entered; Off=Amount Overtendered**. You must also select option **18**.

   To prevent a workstation operator from issuing change for the Tender/Media, set the **HALO Code** to 0 (zero), and deselect option **19**.

   Options **18** and **19** influence non-privileged users of option **35 - Authorize Over HALO Amounts on [Tender/Media] Keys** set in the Roles module, which is described in step 7.
6. Click **Save**.
7. To set employee privileges for HALO:
   a. Select the Enterprise level, click **Configuration**, and then click **Roles**.
   b. Double-click an employee role, click the **Operations** tab, and then click the **Transactions** subtab.
   c. In the Tender Media Options section, select **35 - Authorize Over HALO Amounts on [Tender/Media] Keys**.

      Enabling this option allows employees with the role to exceed the HALO amount set for a Tender/Media key.
   d. Click **Save**.

The Oracle Payment Interface (OPI)

The Oracle Payment Interface (OPI) simplifies credit card payment configuration by enabling Simphony to communicate with payment service providers (PSPs) that provide credit card processing using a single payment driver. In addition the OPI:

- Enhances security by not handling or storing card holder or sensitive authentication data in Simphony or OPI. PSPs process card data and provide a token to Simphony.
- Eliminates credit card batch processing in Simphony by automating end-of-day settlement for credit card transactions through the OPI.

Before performing an installation or upgrade, ensure that you install or upgrade to OPI version 6.2, including the latest patch.

See My Oracle Support (MOS) at https://support.oracle.com/ to access the latest OPI payment drivers.

OPI Architecture

In the Simphony implementation, an OPI server is installed on-premise and processes payment requests between the Simphony POS clients and the PSP. The PSP provides the PIN Entry Devices (PEDs) that read and process credit card data, and then communicate with the PSP Host on the Cloud. The PEDs can be connected directly to the POS clients (usually via serial, USB, or Bluetooth connection) or they can be network devices.

OPI supports two modes:

- Terminal Mode
- Middleware Mode

In Terminal mode, the OPI Datastore database contains a table with a one-to-one mapping of POS client to PED. A payment request from a POS client is directed to the correct PED. In Middleware mode, the PSP provides an application, called middleware, that handles the mapping of a POS client to a PED. The OPI server directs all payment requests to the middleware application, which then routes the request to the appropriate PED. In either mode, neither the OPI server nor Simphony come in contact with credit card data. Sensitive data is handled strictly between the PED or middleware and the PSP Host. OPI receives and stores tokens and voucher printing instructions from the PSP, and passes the voucher data to Simphony, leaving Simphony and the OPI server out of PA-DSS scope.

Figure 12-1 Terminal Mode Architecture

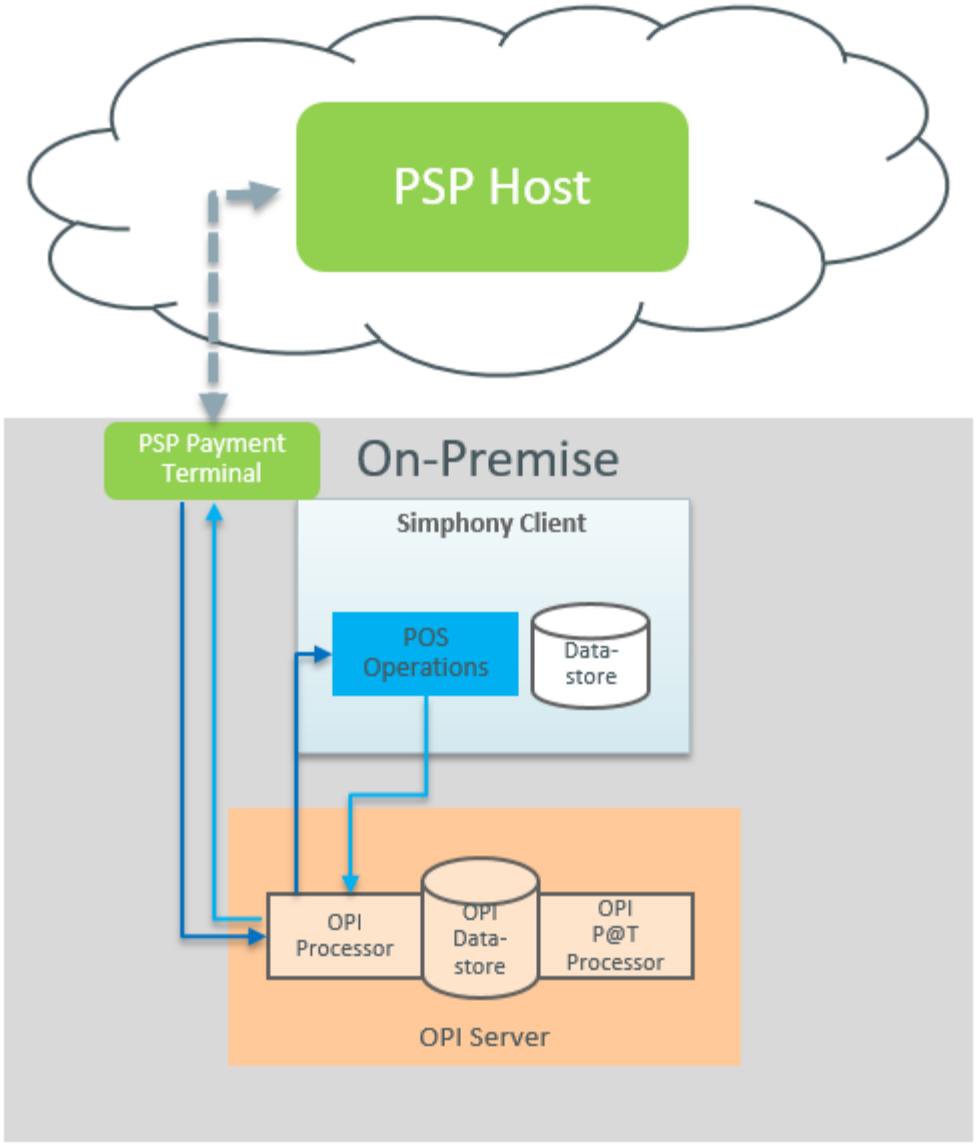
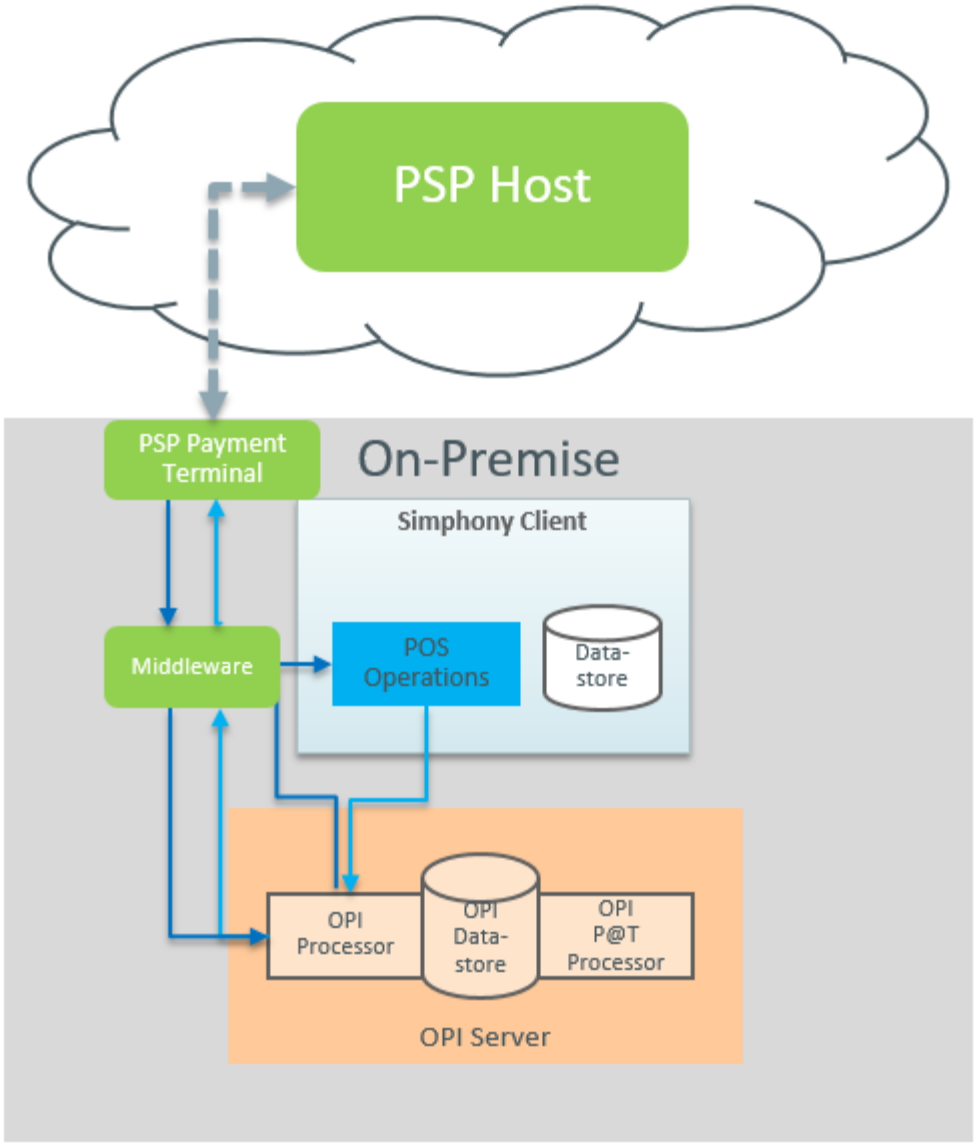


Figure 12-2 Middleware Mode Architecture



Configuring the OPI Driver

If the property sends transactions to multiple Merchant IDs, create the OPI driver record in the property with the Merchant ID that is used by a majority of the revenue centers, and then override the driver records of the revenue centers that route transactions to other Merchant IDs.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Payment Drivers**.
2. Insert a new Payment Driver record named `OPI`, and then double-click the record to open it.
3. On the **General** tab, select **3 - DLL** or **26 - Secure DLL Configuration** as the **Content Type**, click **Import from a file**, browse to `[Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers\OPIPayment.dll`, and then click **Open**.

4. On the **Configurations** subtab, enter information in the following fields:
   - **Display Name**: Enter a display name for the driver (for example, `OPI`).
   - **Merchant Number**: Enter the Merchant ID.
   - **Primary Host**: Enter the URL for the OPI gateway.
   - **Host Timeout**: Enter the timeout value in seconds. The default timeout value is 180 seconds.
   - **Pass Phrase**: Enter a passphrase for authentication.
5. Click **Save**.

Configuring the OPI Payment Module

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Payments**.
2. Insert a new record for the OPI, and then double-click to open it.
3. Click **Import from a file**, browse to `[Drive letter]\MICROS\Simphony2\EgatewayService\handlers\Micros.Payment.LoadableCreditCardModule.dll`, and then click **Open**.
4. Select the OPI **Driver** from the drop-down list.
5. Select the **Device** from the drop-down list.
6. Select **3 - DLL** from the **Content Type** drop-down list.
7. On the **Configuration** subtab, modify the settings as required. Obtain the configuration information from the credit card processor.

   To enable **Incremental Authorizations**, select **True**. By default, **Incremental Authorizations** is disabled (**False**). You must use the native Oracle Payment Interface (OPI) payment drivers and the payment service provider must support Incremental Authorizations.
8. Click **Save**.

Configuring the Default Payment Tender for OPI

1. Create a credit card tender for the OPI. See Configuring a Credit Card Tender for instructions.

   Give the tender a general name such as `OPIDefault`.
2. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tender Parameters**.
3. On the Configuration tab, select the credit card tender that you created for the OPI as the **Payment Card Tender**.
4. Click **Save**.
5. Create a button for the default OPI tender. See Creating Credit Card Payment Buttons for instructions.

Creating Credit Card Payment Buttons

Oracle recommends that you create payment card buttons on a page for the credit card functions.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place credit card buttons.
3. On the **Edit** tab, select the page area in which to define the credit card functions (typically the payment area).
4. Click **Payments**.
5. On the **General** subtab, select **Payment Tenders** from the **Type** drop-down list.
6. Click the black arrow beneath the **Type** drop-down list.
7. From the Select Tender/Media Payment dialog, select the payment tender, and then click **OK**.

   Select **None** to use all types of credit cards.
8. From the Payment Configuration dialog, select **CreditDebit:Loadable** from the **Payment Type** drop-down list.
9. Select the appropriate function key from the **Functions** drop-down list:
   - **CreditAuthOnly**: This function sends a request to the cardholder's bank to authorize available funds and place a hold on those funds for sale. The account is not charged. This function is used in Table Service to obtain authorization of payment.
   - **CreditAuthAndPay**: This function authorizes funds available and completes the sale. This function is used in Quick Service to apply payment and close a check.
   - **InitialAuthorization**: This function sends a request to the cardholder's bank to authorize available funds and place a hold on those funds for sale. The account is not charged. This function is used in Table Service to obtain authorization of payment for a large party or with bar tabs where additional charges may be incurred. It is also used to name a bar tab after the patron whose credit card was authorized.
   - **ManualAuthorization**: When connection to the credit card processor is unavailable, this function allows the workstation operator to manually enter the authorization code (obtained by phoning the credit card processor).
10. To use the Initial Authorization process to update the check ID (check name) with the card holder's name from the authorized credit card:
    a. In the **Argument** field, enter **GuestCheckId**.
    b. Click **OK**.

    The Initial Authorization performs an SPI authorization, and Simphony retrieves the card holder name (if present) from the payment service provider (PSP) and inserts it into the **Guest Check ID** field.
11. Position and size the button on the page. Use the Style arrow to change the color.
12. In the **Legend** field, enter the button name.
13. Repeat Steps 7 through 11 for each type of payment tender.
14. Click **Save**.

Updating Credit Card Preambles for OPI

1. Click the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Double-click a credit card tender type to open it, click the **Options** tab, and then click the **Credit Card Options** subtab.

3. In the Preambles section, if standard credit card preambles are defined, select the preamble records, and then click **Delete**.

   You must delete all preexisting standard credit card preambles.

4. Click **Add**, and then configure the **Start** preamble and the **Length** based on the card payment type.

   See Credit Card Preambles for OPI and SPI for a list of preambles for commonly used card types.

5. Click **Save**.

6. Repeat Steps 2 through 5 for other credit card payment types.

Configuring the OPI and SPI to Settle Transactions Automatically

You can configure the OPI or SPI settlement to run automatically at a recurring day and time. The settlement occurs at the Coordinated Universal Time (UTC) standard. Here are a few configuration examples:

Workstation Time Zone: Eastern

Recurrence Time: 15:00

Configuration 1 (There is no conversion to UTC in this case)

- Time Zone: 0 - Local Time Zone
- Time Settlement Occurs: 15:00

Any event with a Time Zone is converted to UTC. This is best illustrated with Configuration 2.

Configuration 2

- Time Zone: 35 - Eastern Time Zone (UTC - 5) (Daylight Savings Time is active)
- UTC Time Settlement Will Occur: 19:00

Configuration 3

- Time Zone: 260 - Brisbane (UTC + 10)
- UTC Time Settlement Will Occur: 05:00 Tomorrow

1. Select the Enterprise or property, click **Configuration**, and then click **Task Schedules**.
2. Insert a new record for the OPI or SPI EOD, and then double-click the record to open it.
3. On the General tab, in the **Service Type** drop-down list, select **8 - Check and Posting**, and then select **5 - EOD Settlement** as the **Task Type**.
4. In the **Schedule Type** drop-down list, select **4 - Recurring - Daily**, and then select **Enabled** in the Duration section.
5. Select the **Start date**, and then click **No end date**.
6. Click the **Recurrence** tab.
7. To set the SOD settlement:
   a. In the Daily Frequency section, select **Occurs once at**.
   b. Schedule the EOD settlement to execute at the same time SOD runs on the property.
8. To set the EOD settlement:
   a. In the Daily section, enter **1** in the **Every xx day(s)** field.

b. In the Daily Frequency section, select **Occurs every** and schedule the EOD batch settlement time to execute.

9. Click **Save**.

Configuring the OPI and SPI to Settle Transactions Manually

If credit card settlement fails, you can enable workstation operators to manually perform the EOD OPI or SPI settlement through the workstation.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the button to appear on the workstation, and insert a new button.
3. On the General tab, select **Payment Tenders** as the **Type**, click the right arrow directly beneath the **Type** drop-down list, select the **0–None** payment record, and then click **OK**.
4. On the Payment Configuration dialog, select **CreditDebit:Loadable** from the **Payment Type** drop-down list.
5. In the **Argument** drop-down list, select **CreditDebit:Loadable ManualEODSettlement**, and then click **OK**.
6. Enter a **Legend** for the button (for example, `OPI EOD` or `SPI EOD`), and then click **Save**.

Credit Card Preambles for OPI and SPI

The preambles configured in EMC are different than the Issuer IDs used by SPI and OPI, and these numbers are not a one-to-one match.

The following table lists the credit card preambles for OPI and SPI.

Table 12-4 Credit Card Preambles for OPI and SPI

Card Type	Preamble	Preamble Length	Issuer ID
Visa	0*	1	01
Visa PIN Credit	12*	2	
Visa Electron	17*	2	17
Visa Debit	18*	2	18
VPAY	20*	2	20
MasterCard	1*	1	02
MasterC Debit	24*	2	24
MasterCard PIN Credit	13*	2	
American Express	2*	1	03
Discover	26*	2	12
Diners	3*	1	04
JCB	4*	1	05
Stored Value Card (SVC)	7*	1	07
Maestro	19*	2	19
Gift Card	8*	1	07
Points	9*	1	

Table 12-4 (Cont.) Credit Card Preambles for OPI and SPI

Card Type	Preamble	Preamble Length	Issuer ID
CUP	10*	2	06
CUP Debit	14*	2	09
Debit	11*	2	00
Interac	15*	2	10
UKDM/Switch	16	1	16
VPAY	20*	2	20
Alliance	21*	2	21
ecChip	22*	2	22
GiroCard	23*	2	23
Bank Card	25*	2	11
PayPal	27*	2	13
RESERVE-1	28*	2	31
RESERVE-2	29*	2	32
RESERVE-3	30*	2	33
RESERVE-4	31*	2	34
RESERVE-5	32*	2	35
RESERVE-6	33*	2	36
RESERVE-7	34*	2	37
RESERVE-8	35*	2	38
RESERVE-9	36*	2	39
RESERVE-10	37*	2	40
RESERVE-11	38*	2	41
RESERVE-12	39*	2	42
RESERVE-13	40*	2	43
RESERVE-14	41*	2	44
RESERVE-15	42*	2	45
AliPay			26
MIR			27
WeChat Pay			25

The Simphony Payment Interface (SPI)

The SPI is a resilient version of the OPI. It is part of the Simphony client application and formats the individual messages for the PSP (terminal or middleware) and processes the responses for the client directly. This eliminates the need for the OPI server and avoids traffic over the LAN on POS clients that have a PIN Entry Device (PED) attached.

SPI Architecture

With the exception of Pay@Table, there is no longer a need for the OPI server. The business logic and communication layer that with the OPI are handled by the OPI server are included in

the SPI, which is a component of the Simphony client application. If a POS client has a PED attached, it is possible to be completely independent of the LAN for payment processing.

The SPI can be deployed using one of the following connection methods: Terminal mode or Middleware mode. Talk to your PSP to identify the mode(s) which are available and best suited to your environment.

Terminal Mode

POS Clients With Attached PEDs

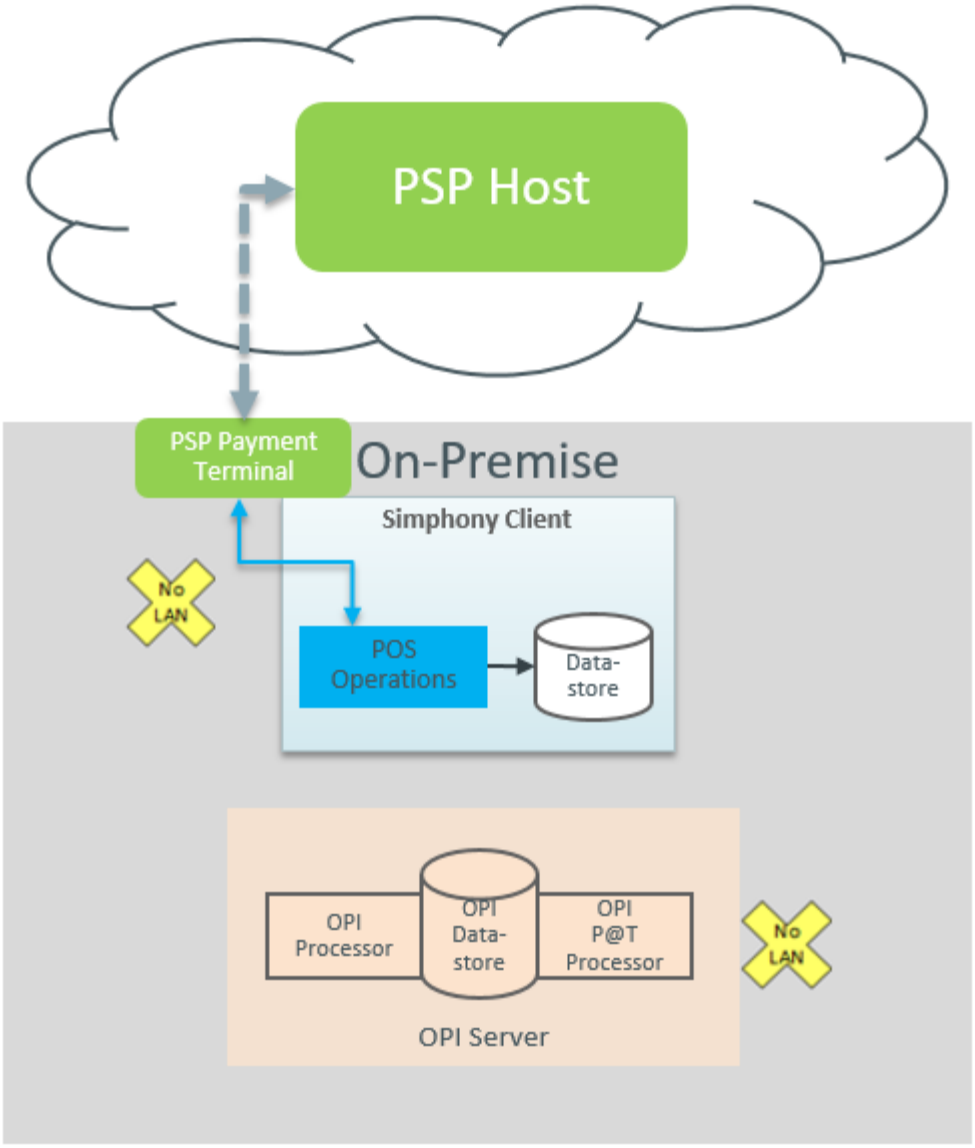
In the ideal scenario, Simphony POS clients (typically Win32 or Win64) are each attached to a PED. This setup eliminates the need for a LAN connection.

Figure 12-3 POS Clients With Attached PEDs



The process for a credit card transaction follows these steps (as illustrated in the following figure):

Figure 12-4 Terminal Mode Architecture With Attached PED



1. POS Operations sends a payment request to the PED, addressing it as localhost:port.
2. The PED communicates with the PSP Host and returns the token and voucher printing instructions to POS Operations.
3. The token and other transaction details are saved in the Datastore on the POS client.

This scenario is independent of both the LAN and the OPI server.

POS Clients Without Attached PEDs

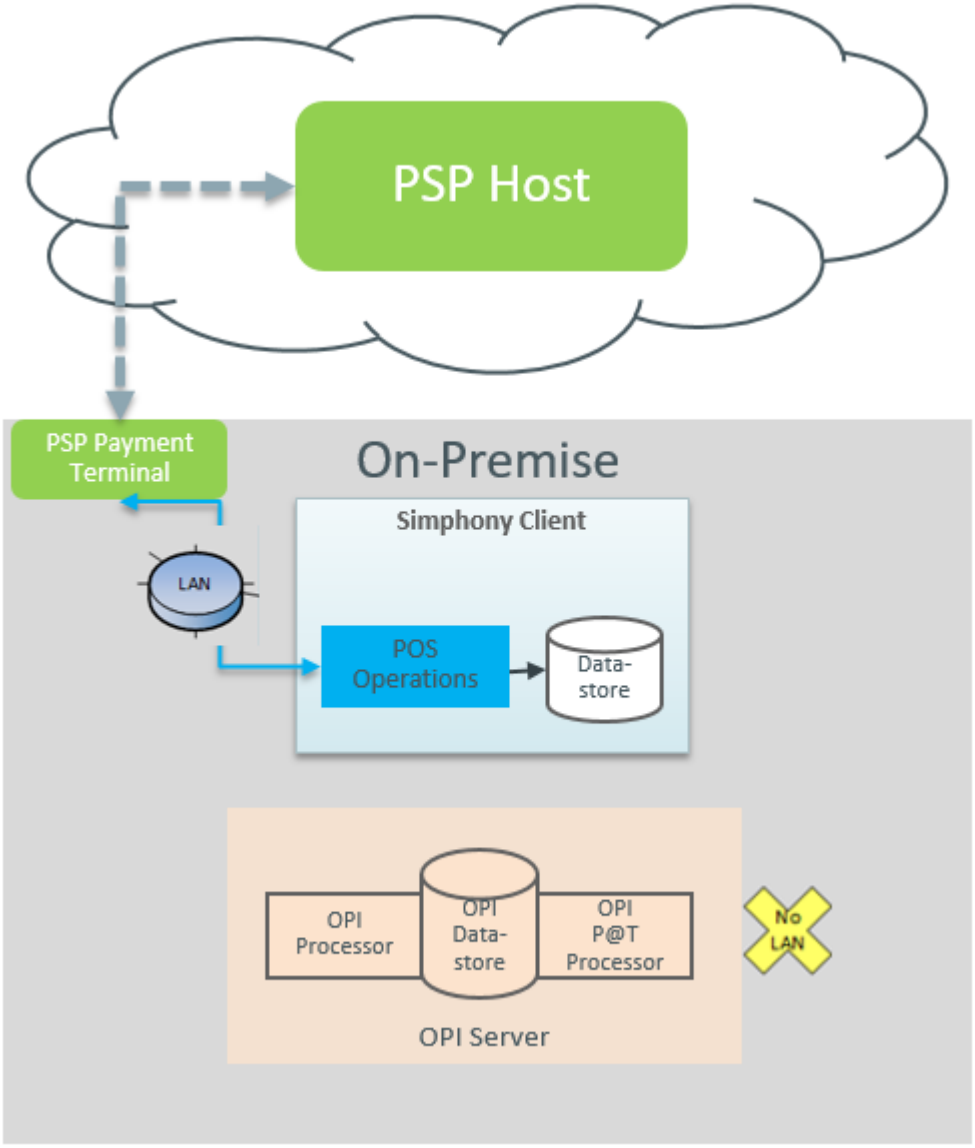
POS clients, such as tablets and Android devices, may not have PED devices directly attached. However, PSPs offer network-capable PEDs that can be used.

Figure 12-5 POS Clients Without Attached PEDs



The process for a credit card transaction follows these steps (as illustrated in the following figure):

Figure 12-6 Terminal Mode Architecture Without Attached PED



1. POS Operations sends a payment request to the PED over the network, addressing it with its IP address:port.
2. The PED communicates with the PSP Host and returns the token and voucher printing instructions to POS Operations.
3. The token and other transaction details are saved in the Datastore on the POS client.

This scenario depends on a LAN connection and is vulnerable to network failure to the PED, but does not require an OPI server.

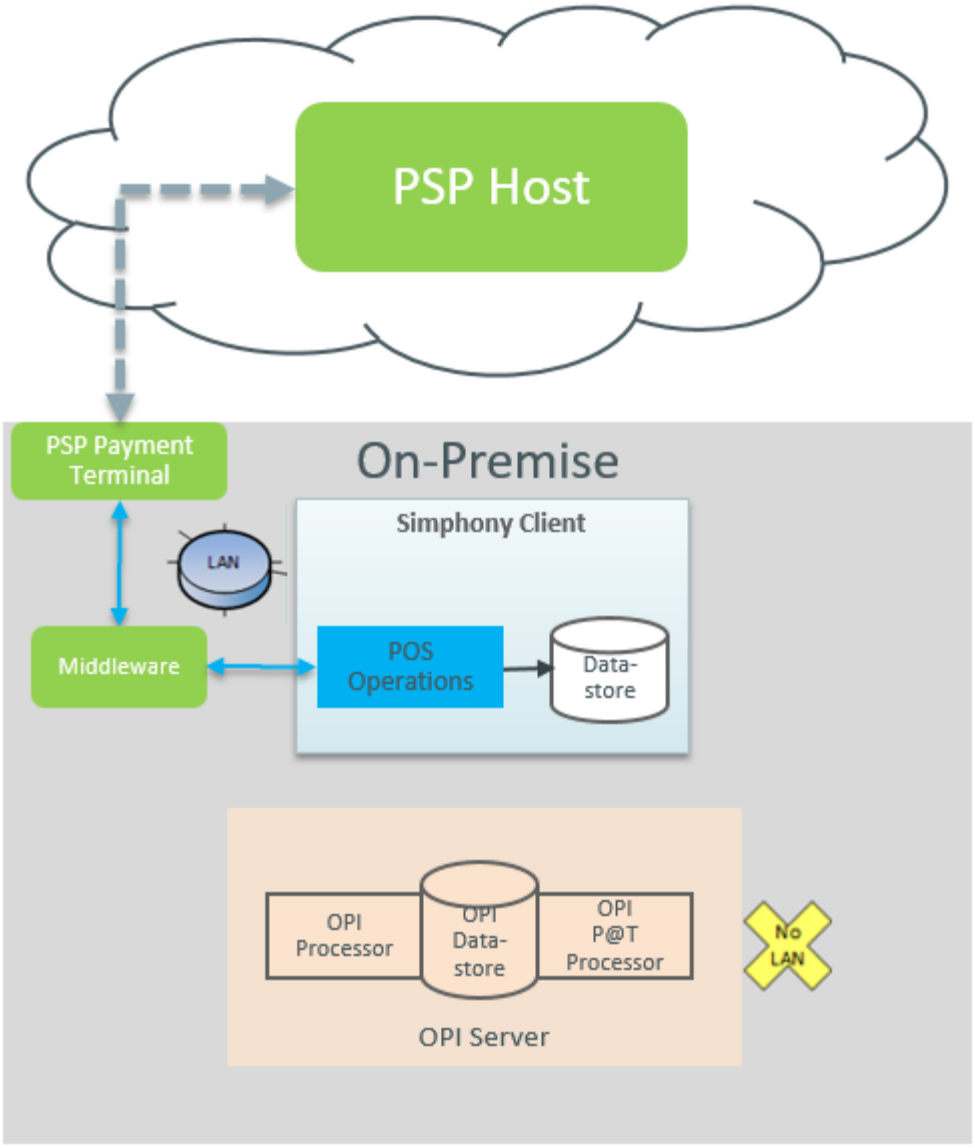
Middleware Mode

POS Clients With or Without Attached PEDs

The PSP provides an application, called middleware, which handles the mapping of a POS client to a PED.

The process for a credit card transaction follows these steps (as illustrated in the following figure):

Figure 12-7 Middleware Mode Architecture With or Without Attached PED



1. POS Operations sends a payment request to the IP address where the middleware application is configured.
2. The middleware application passes the request to the appropriate PED.
3. The PED communicates with the PSP Host and returns the token and voucher printing instructions to POS Operations.
4. The token and other transaction details are saved in the Datastore on the POS client.

This scenario depends on a LAN connection and is vulnerable to network failure to the PED, but does not require an OPI server.

Payment Driver vs. Workstation Settings

You must configure SPI as a payment driver. You can configure the SPI driver at the Enterprise, zone, property, and revenue center levels in the Payment Drivers module, and you

can override the SPI configuration to set client specific values at the workstation level in the Workstations module. Workstation settings override Payment Driver settings in case of conflict. If workstation settings are present, but the driver is not SPI, workstation settings are ignored.

One example where workstation device settings are required when a property or revenue center has a mix of Windows clients that have PEDs directly attached, and Android clients that are paired with network PEDs in Terminal mode:

- For the Windows clients, entering http://localhost:port in the **Primary Host** of the Payment Driver module is sufficient as each PED communicates with the client on the local host IP address.
- For the Android clients, it is necessary to enter each PED's IP address individually. An SPI device is added for each Android client, and the only setting entered is the paired PED's actual URL. When the Android client attempts to process a credit card transaction, the device setting URL will override the Payment Driver setting, and it will communicate with its own paired PED. If this environment is a middleware mode, this configuration is not necessary. In that case, the URL in the Payment Driver points to the middleware host, which in turn looks up the paired PED for the requesting client, and passes the request on.

SPI supports TLS 1.2 with two-way authentication, where server and client exchange certificates. The PSP is responsible for issuing certificates. Another scenario in which workstation devices have to be used for each client is HTTPS with two-way authentication when client certificates are to be issued for each client individually. In that case, the Payment Driver settings reflect the security settings as HTTPS with Certificate Validation, and the Server Certificate's public key file will be loaded. For each client, a workstation SPI device is created, and the client's certificate with password is loaded.

OPI Users

If you are currently using the Oracle Payment Interface (OPI), you will not experience changes as the system can run SPI and OPI together at the same property. OPI transaction data remains in the OPI database. If an Enterprise is currently using OPI, you can create an override record at a property or revenue center to configure it to use SPI, while other properties or revenue centers remain on OPI. Only a few settings that were configured on the OPI server are now configured in EMC. If required, client-specific settings (such as the PED's IP address or client certificates) can be set at each workstation by configuring an SPI device.

The OPI and SPI use the same OPIPayment.dll file.

Pay@Table

Pay@Table is supported by both OPI and SPI. Pay@Table devices continue to connect to the OPI server and use Transaction Services to close the check. The architecture and configuration remains the same. These devices are supported with a LAN connection, but not during LAN failure. If the LAN connection is not available, Pay@Table devices are dependent on the OPI server.

Configuring the SPI Payment Driver

To add the SPI driver for the first time, or to update an existing property, revenue center, or zone from OPI to using SPI:

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Payment Drivers**.

   If multiple properties exist and you are configuring one property or revenue center to use SPI, select the property or revenue center that will use SPI.

2. Insert a new Payment Driver record named `SPI`, and then double-click the record to open it.
3. On the **General** tab, select **26 - Secure DLL Configuration** as the **Content Type**, click **Import from a file**, browse to `[Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers\OPIPayment.dll`, and then click **Open**.
4. On the **Configuration** subtab, enter information in the following fields:

Table 12-5 Configuration Fields

Field	Description
Description	Enter a description for the driver (for example, `SPI`).
Display Name	Enter a display name for the driver (for example, `SPI`).
Currency Code	Enter or verify the existing ISO numeric three-digit currency code for the country. (This value can only be set when **SPI Interface** = **True**.)
Enable Quick Chip	Set the value to **True** when using the quick chip feature. (This value can only be set when **SPI Interface** = **True**.) Ensure that your PSP supports quick chip before you enable this feature. Quick chip lets the guest swipe or dip a credit card at the beginning of a fast transaction while the workstation operator enters the menu items. The system must allow fast transactions by enabling option **15 - Allow Fast Transactions** in the RVC Parameters module.
Merchant Number	Enter the Merchant ID.
Host Timeout	Enter the timeout value in seconds. This is the amount of time that the host waits for a response from the PSP. The default timeout value is 180 seconds.
Pass Phrase	Leave this field blank for SPI.
Primary Host	Enter the URL for the PSP endpoint. For example, in Terminal Mode this is `http://PEDIPAddress:Port`. In Middleware Mode, this is `http://MiddlewareIPAddress:Port`. If the IP address for each PED is different (network/wireless PEDs in Terminal mode), you need to create workstation devices to enter each POS client's PED's IP address individually. If the **Security Settings** use HTTPS, ensure that the **Primary Host** field shows `https`. This is based on the **Security** settings below.
SPI Interface	Set the value to **True** when using the SPI driver. This is helpful in preparation for an upgrade or switch from OPI to SPI, when you have a property with many POS clients that each require a certificate. While the property is still operating on OPI and the payment driver remains set to **SPI Interface** = **False**, each client SPI device can be created and certificates loaded. As long as the payment driver is not set to SPI, the device record is ignored. When the property is ready to switch to SPI, you simply need to set the **SPI Interface** to **True**.

Table 12-5 (Cont.) Configuration Fields

Field	Description
Validate XML Message Against Schema	To validate the format of existing messages that are sent to the PSP against the schema, set the value to **True**. (This value can only be set when **SPI Interface** = **True**.)
Security	You can load the certificate into the payment driver or the workstation device, depending on the communication method and connection between the POS client and the PED. The certificates are installed on the POS clients as part of the DBSync process. • **Security Settings**: Select the appropriate option: – **Use Http Only** – **Use Https with No Certificate Validation** – **Use Https with Certificate Validation** (one- or two-way authentication) * For one-way authentication, the PSP provides the private key for the server certificates, which must be distributed to all POS clients. * For two-way authentication, the client certificates with passwords are also issued by the PSP for each Simphony POS client. • **Load Server Certificate**: Click the ellipsis button, select the server certificate, and then click **Open**. • **Load Client Certificate**: Click the ellipsis button, select the client certificate, enter the password when prompted, and then click **Open**. • **Delete Certificates**: To delete a certificate, select **Do Not Delete**, **Delete All Certificates**, **Delete Server Certificate**, or **Delete Client Certificate**. Confirm with **Yes** or **No**. The *Oracle Hospitality Simphony Security Guide* contains more information about the certificates.

5. Click **Save**.

Enabling the Unused Credit Card Authorization Release Alert

If you are using SPI, you can add a warning message to alert workstation operators that unused credit card authorizations are about to be released when finalizing a guest check using a non-credit card tender (for example, cash or gift card). The operator can then cancel the payment or proceed and release the card authorizations. Room charges and partial payments do not trigger the alert nor release unused authorizations. Credit card payments do not trigger the alert message.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
2. Click the **Options** tab.
3. Select **73 - Enable unused Credit Card authorization release alert**.
4. Click **Save**.

Configuring Mail Order Telephone Order (MOTO)

You need to create the MOTO button on a page, allowing workstation operators to use the MOTO feature with SPI.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the MOTO button to appear on the workstation, and insert a new button.
3. On the **General** tab, select **Payment Tenders** as the **Type**, click the right arrow directly beneath the **Type** drop-down list, select the **0 - None** payment record, and then click **OK**.
4. On the Payment Configuration dialog, select **CreditDebit:Loadable** from the **Payment Type** drop-down list.
5. In the **Function** drop-down list, select **CreditAuthAndPay** or **CreditAuthOnly**.
6. In the **Argument** field, enter **MOTO**, and then click **OK**.
7. Enter a **Legend** for the button (for example, **MOTO Sale** or **MOTO Auth**), and then click **Save**.

Configuring Cash Back

Cash back is supported when the Simphony Payment Interface (SPI) is configured, and if the Payment Service Processor (PSP) also supports cash back.

In addition to the steps explained in this section, you need to configure a cash drawer and ensure that an employee is assigned to the cash drawer. Configuring a Cash Drawer contains more information.

1. (Optional) Create a cash back pickup tender. This is used for reporting, if configured.
   a. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
   b. Insert a record, name it **Cash back**, and then click **OK**.
   c. Double-click the cash back record to open it.
   d. On the **General** tab, select **3 - Pickup** from the **Key Type** drop-down list.
   e. Select **9 - CASHBACK** in the **Report Group** drop-down list.
   f. Select **17 - Cash** in the **Print Class** drop-down list.
   g. Click the **Options** tab, and then click the **Ops Behavior** subtab.
   h. Enable the following options:
      - **1 - Open Cash Drawer**
      - **91 - Cash Management Transaction Item**
      - **92 - Affects Cash Pull Threshold**

      Tracking Tender Transaction Items contains more information about **91** and **92**.
   i. Click **Save**.
2. Create a Cash Back non-revenue service charge.
   a. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.

b. Insert a Cash Back service charge record, and then double-click the record to open it.
c. Select **Cash back** in the **Pickup/Tender Media** drop-down list.
d. Select **Cash** in the **Print Class** drop-down list.
e. Select **CASHBACK** in the **Report Group** drop-down list.
f. Select the following options:
   - **1 - ON = Open; OFF = Preset**
   - **7 - Non-Revenue Service Charge (No Post to Sales)**
   - **28 - Cash Management Transaction Item**
g. Click **Save**.

3. Associate the Cash Back non-revenue service charge with the tender:
   a. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tender Parameters**.
   b. On the Configuration tab, ensure that **Default SPI** is selected in the **Payment Card Tender** drop-down list.

      This must be set for SPI transactions to function.
   c. Select an open amount, non-revenue service charge (Cashback) to apply for cash back transactions in the **Cashback Service Charge** drop-down list.
   d. Click **Save**.
4. Enable Cash Back at the workstation:
   a. Select the property, click **Setup**, and then click **Workstations**.
   b. Double-click the workstation that has a Pinpad attached.
   c. Click the **Options** tab, and then click the **Offline/Misc** subtab.
   d. In the Miscellaneous Options section, select **63 - Enable Cashback**.
   e. Click **Save**.

Allowing Employees to Authorize and Perform Cash Back

You must grant permission for employees to authorize and perform a cash back transaction.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, and then click the **Operations** tab.
3. Click the **Transactions** sub-tab, and then in the Service Charge and Discount Options section select **305 - Authorize/Perform Cashback**.
4. Click **Save**.

Configuring Activate, Issue, and Reload Gift Cards with SPI

You can create three different service charge records for Activate Gift Card, Issue Gift Card, and Reload Gift Card, or you can create one service charge record for all three.

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
2. Insert the service charge record (for example, Activate Gift Card, Issue Gift Card, or Reload Gift Card), and then double-click it.

Note the Object # of each service charge.

3. On the **General Settings** tab, select the following options:
   - **1 - ON = Open; OFF = Preset**
   - **7 - Non-Revenue Service Charge (No Post to Sales)**
   - **28 - Cash Management Transaction Item**

   See Configuring Service Charges for a description of each option.
4. Repeat Steps 2 and 3 to configure the other service charge records.
5. Click **Save**.
6. Select the Enterprise or property, click **Configuration**, and then click **Print Classes**.
7. Insert a new record and enter the name of the gift card print class in the **Name** field (for example, Gift Card).
8. Select the following options:
   - **1 - Print on Customer Receipt**
   - **2 - Print on Journal**
   - **3 - Print on Guest Check**
9. Click **Save**.

Configuring Default Gift Card Redemption and Cash Out Gift Card with SPI

You can create two tender media records for Default Gift Card Redemption and Cash Out Gift Card.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Insert a record, name it **Default Gift Card Redemption**, and then click **OK**.
3. Double-click the **Default Gift Card Redemption** record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Select **3 - Gift Cards** from the **Report Group** drop-down list.
6. Click the **Options** tab, and then click the **Printing Options** subtab.
7. Select **8 - Print Customer Receipt** and **21 - Print Summary Totals**.
8. Select the **Ops Behavior** subtab, and then select the following options:
   - **2 - Amount Required**
   - **91 - Cash Management Transaction Item**
9. Repeat Steps 2 through 8 to configure the Cash Out Gift Card record.
10. Click **Save**.
11. Select the Enterprise or property, click **Configuration**, and then click **Print Classes**.
12. Insert a new record and enter the name of the gift card print class in the Name field (for example, Default Gift Card Redemption).
13. Select the following options:
    - **1 - Print on Customer Receipt**
    - **2 - Print on Journal**

- **3 - Print on Guest Check**

14. Click **Save**.

Configuring Gift Card Providers for SPI

You can configure multiple gift card providers to use with SPI. The Gift Card Provider lets you configure the transaction type.

1. Select the Enterprise, click **Configuration**, and then click **Gift Card Provider**.
2. Insert a new gift card provider record with a relevant name, and then double-click the record to open it.
3. Enter the **Provider Reference**. This is the Provider ID, which is obtained from the Payment Service Provider (PSP). You cannot enter duplicate Provider References.

   Simphony reads the Provider ID that is returned from the PSP and uses this configuration to obtain the specific gift card provider. If no Provider ID is returned or if a Provider ID is returned that is not configured in this module, Simphony uses the Tender Parameters module configuration.
4. Select the default transaction type value for the following fields:
   - **Activate Service Charge**: Select the service charge to use to activate a gift card for this provider. Only non-revenue service charges may be used.
   - **Issue Service Charge**: Select the service charge to use to issue a gift card for this provider. Only non-revenue service charges may be used.
   - **Reload Service Charge**: Select the service charge to use to reload a gift card for this provider. Only non-revenue service charges may be used.
   - **Redeem Tender Media**: Select the tender to use to redeem a gift card for this provider.

     When performing a gift card redemption transaction, the preambles in the Tender/Media module are not used if a Provider ID is returned in the PSP response.
   - **Cash Out Pickup**: Select the tender to use to cash out a gift card for this provider. Only Pickup Tenders may be used.
5. Repeat steps 2 through 4 for all gift card providers.
6. Click **Save**.

Configuring Gift Card Tender Parameters for SPI

You need to have the privileges to configure the Tender Parameters module for gift cards.

To configure the default transaction types for SPI gift cards:

1. Select the Enterprise, click **Setup**, and then click **Tender Parameters**.
2. On the Configuration tab, select the SPI default values for the following fields:
   - **Payment Card Tender**: Select the payment tender to use as the default for SPI (for example, **14 - Default SPI**).
   - **Activate Gift Card Service Charge**: Select the default service charge to activate a gift card (for example, **7 - Activate Gift Card**).
   - **Issue Gift Card Service Charge**: Select the default service charge to issue a gift card (for example, **8 - Issue Gift Card**).

- **Reload Gift Card Service Charge**: Select the default service charge to reload a gift card (for example, **9 - Reload Gift Card**).
- **Redeem Gift Card Tender**: Select the default tender to redeem a gift card (for example, **41 - Default Gift Card Redemption**).
- **Cash Out Gift Card Tender**: Select the default tender to cash out a gift card (for example, **42 - Default Cashout Gift Card**).

  The default **Payment Card Tender** must be configured for a Cash Out Gift Card transaction to function.
- **Cashback Service Charge**: Select the default service charge to use for giving cash back from the use of a gift card (for example, **37 - Cashback**).

3. Click **Save**.

Creating SPI Gift Card Buttons

You can create buttons on a POS client page for the SPI gift card functions.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place gift card buttons.
3. On the **Edit** tab, select the page area in which to define the gift card functions (typically the payment or function area).
4. Click **Button**.
5. On the **General** subtab, select **Payment Tenders** from the **Type** drop-down list.
6. Click the black arrow beneath the **Type** drop-down list.
7. Select **0 - None**, and then click **OK**.
8. In the Payment Configuration dialog, select **CreditDebit:Loadable** from the **Payment Type** drop-down list.
9. Select **Balance Inquiry** from the **Functions** drop-down list, and then click **OK**.
10. Position and size the button on the page. Use the Style arrow to change the color.
11. In the **Legend** field, enter the button name (for example, Gift Card Balance Inquiry)
12. Click **Save**.
13. Repeat steps 4 through 12 to create buttons for each gift card function listed in the following table. Select the corresponding function shown below from the **Functions** drop-down list in Step 9.

Table 12-6 Gift Card Buttons

Button Name	Function
Issue Gift Card	IssueGiftCard
Activate Gift Card	ActivateGiftCard
Reload Gift Card	ReloadGiftCard
Cash Out Gift Card	CashoutGiftCard

Configuring a Credit Card Tender

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Insert a record and name it based on the credit card company (for example, Visa or MasterCard).
3. Double-click the credit card record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Click the **Options** tab, and then click the **Printing Options** subtab.
6. Select **8 - Print Customer Receipt** and **21 - Print Summary Totals**.
7. Click the **Ops Behavior** subtab.
8. Select **3 - Assume Paid in Full**.
9. Click **Save**.

Configuring a Tender with Charged Tips

A charged tip is a gratuity credited to a server by adding it to a charge slip, such as a credit charge slip or room charge slip. Thus, like the meal, the tip is “charged” to a credit card or room account. A charged tip is credited to the check operator.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Double-click a credit card tender record to open it (for example, Visa or OPERA Room Charge).
3. Click the **Ops Behavior** subtab.
4. Select the following options:.
   - **9 - Charged Tip Required**
   - **10 - Post to Gross Receipts on Tip Reports**

     Disabling **10** causes service charges to post to gross receipts as a negative amount on tip reports.
   - **11 - Post Amount to Charged Receipts on Tip Reports**
5. Click **Save**.
6. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
7. Double-click a service charge record to open it
8. In the Service Charge options section, select **3 - Post to Charged Tips Total on Tip Reports**.

   Configuring Service Charges contains more information about option **3**.
9. Click **Save**.

Credit Card Preamble

A credit card preamble—sometimes called a credit card prefix, issuer identification number (IIN), or bank identification number (BIN)—is a digit or series of digits at the beginning of a credit card number that identifies the type of card or company that issued the card.

Adhere to the following rules for governing a valid credit card preamble:

- The **Start** and **End** preambles must end with an asterisk (*) (for example, `304*`).
- The number of digits in the **Start** and **End** fields must be the same.
- The number of digits in the **Start** and **End** fields cannot exceed the **Length** defined.
- The value of the **End** field must be greater than the value of the **Start** field.

Configuring Standard Credit Card Preambles

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Double-click a credit card tender to open it, click the **Options** tab, and then click the **Credit Card Options** subtab.
3. In the Preambles section, click **Add**, and then enter the **Start**, **End**, and **Length** for the preamble.

   If the preamble record defines a range such as 3050 to 3090, the Start field represents the begin range, which is 3050*, and the End field represents the end range, which is 3090*.

   See List of Standard Preambles for the U.S for a list of standard credit card preamble ranges for different card types.
4. To add another preamble for the card, Repeat Step 3.
5. Click **Save**.

List of Standard Credit Card Preambles for the U.S.

The values listed in the following table apply to all US sites. Additional types are accepted in other countries. Contact the local processor for the specific list. Preambles also change as card providers are bought out (for instance, Discover purchased Diner's Club) and should be updated regularly.

Table 12-7 List of Standard U.S. Credit Card Preambles

Card Type	Start	End	Length
Visa	40000000*	49999999*	16
MasterCard	51000000*	55999999*	16
	222100*	272099*	16
American Express	34000000*	34999999*	16
	37000000*	37999999*	15
Diners Club	36000000*	36999999*	14
	38000000*	39999999*	16
	30000000*	30599999*	16
	30950000*	30959999*	16
JCB	35280000*	35899999*	16
Discover	60110000*	60110999*	16
	60112000*	60114999*	16
	60117400*	60117499*	16
	60117700*	60117999*	16
	60118600*	60119999*	16
	64400000*	65999999*	16

Table 12-7 (Cont.) List of Standard U.S. Credit Card Preambles

Card Type	Start	End	Length
Discover (CUP)	62212600*	62292599*	16
	62400000*	62699999*	16
	62820000*	62889999*	16

Configuring Equal Payment Functionality

To configure the Equal Payment On/Off function in EMC:

1. Select the Enterprise or property level, click **Configuration**, and then click **Page Design**.
2. In the **Page Design** module, select the **Transaction** page for editing.
3. In the **Edit** tab, add the new toggle button function **Equal Payment On/Off**. You can also edit an existing button function and replace it with the **Equal Payment On/Off** button.
4. Click **Save**.
5. Select the Enterprise, zone, property, or revenue center, click **Configuration**, and then click **Format Parameters**.
6. In the **Options** tab, select **62 - Print Equal Payment Receipts**.

   When enabled, the printed equal payment receipt shows all menu items, subtotal, tax, total due, and equal partial payment amount including tips or change. The receipt prints on the workstation guest check printer or customer receipt printer for fast transactions.
7. Click **Save**.

Configuring Credit Card Authorization to Print Merchant Vouchers and Customer Receipts

You can configure the printing of credit card vouchers when workstation operators press the **Credit Card Authorization** function key on the POS client. Complete the steps below to allow the following items to print:

- Merchant voucher (for cardholder signature)
- Customer receipt

Confirm the cardholder signature verification with your Payment Service Processor (PSP) before configuring Quick Service Limits. Cardholder signature verification prompts are forced by the PSP, and may appear for every transaction, even if the property is configured to not print merchant vouchers below a certain amount. This could leave a property in a situation where no signature is present, but the workstation operator is prompted to verify it.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Click the **Printing Options** tab, and then select the following options:
   - **8 - Print Customer Receipt**
   - **54 - Print 2 Guest Checks/Receipts**
3. Click **Save**.
4. Repeat Steps 1 through 3 for each credit card tender record.

If multiple properties exist and each property has different credit card tenders (not inherited from the Enterprise), you will need to configure the printing options separately for each property.

5. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
6. Click the **CA/EDC** tab (Credit Card Authorization/Electronic Draft Capture), and then select **7 - Print Two Credit Card Vouchers**.
7. Click **Save**.

Configuring Credit Card Voucher Headers and Trailers

Credit card headers and trailers are leading and trailing lines that print on credit card vouchers.

1. Select the Enterprise or revenue center, click **Descriptors**, and then click either **Credit Card Headers** or **Credit Card Trailers**.
2. In the Text column, enter the text to appear on the header or trailer in the rows.
3. To insert a logo for the header or trailer, select a check box from the **Use Logo** column, and then select a logo using the ellipsis point (...) button in the **Logo** column.

   Logo Printing contains more information about setting a header or trailer line to print logos rather than text.
4. Click **Save**.

Configuring Email Receipts

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. On the **General** tab, click the **Primary SMTP Server** subtab.
3. Enter information in the fields as described in the following table:

Table 12-8 Email Receipt Fields

Field	Description
Server	Enter the email server or service to use. Click **Select** to choose from the SMTP Server list of commonly used mail servers (for example, Outlook, Gmail, or Yahoo).
Port	Enter the port number for the SMTP email server. A default port of 587 works for most SMTP servers.
SSL	Select this option to require secure Internet communication.
User Name	Enter the user name of the email address that will send receipts.
Password, Confirm Password	Enter the password associated with the email user name.
Source Email	Enter the full email address to appear as the sender in the emailed receipt. Depending on the SMTP server, this may not create a copy of emails sent.

Table 12-8 (Cont.) Email Receipt Fields

Field	Description
Name	Enter the business name or sender name to appear along with the email in the sender field. Depending on the SMTP server, this value may or may not appear in the sent email (for example, Username = jsmith Name = John could appear as: John<jsmith@oracle.com>).
BCC List	Enter the email addresses to receive a blind carbon copy of the email receipt that is sent to the guest. Oracle recommends that you list the source email in the BCC field so you can resend copies of email receipts later if necessary.

4. Click the **Send Test Email** button to send a test email receipt message to the source email address. A confirmation appears after the email is successfully sent.
5. Click the **Backup SMTP Server** subtab.
6. Configure the Backup SMTP Server with the same settings as the Primary SMTP Server or an alternate server from which to send emails in the event the primary server becomes unavailable.
7. Click the **Text Formatting** subtab, and then enter information in the following fields:
   - **Email Subject**: Enter text in rich text format to appear as the subject line of email receipts.
   - **Email Body**: Enter text in rich text format to appear as the body of email receipts. You must include @@Check in the body in order to send a copy of the receipt.
8. Click the **HTML Formatting** subtab, and then enter information in the following fields:
   - **Email Subject**: Enter text in HTML format as the subject line of email receipts.
   - **Email Body**: Enter text in HTML format as the body of email receipts. You must include @@Check in the body in order to send a copy of the receipt.
9. Select the **Send Html Email** check box to dim the Text Formatting tab and send only the HTML format. Deselect this option to dim the HTML Formatting tab and send only the text formatted email.
10. Click **Save**.

Autosequence Events

You can set up automatic event tasks, such as running Start of Day (SOD) and nightly credit card batching, using the PC Autosequence feature. After you create an automatic event, you can schedule it to run repeatedly at specific frequencies or time intervals.

To set up an automatic event, you must configure the Autosequence Event and the Autosequence Event Schedule.

Configuring Autosequence Events

1. Select the Enterprise level, click **Configuration**, and then click **PC Autosequences**.

2. Insert a record for the autosequence event (for example, Nightly Batch). If the autosequence event record exists, skip this step.
3. Double-click the record to open it.
4. On the **General** tab, select each **Property** to include in the autosequence event run.
5. (Optional) Select the employee group that is allowed to run the autosequence event from the **Privilege Group** drop-down list.
6. (Optional) To restrict execution of the autosequence event, click the **Add** link from the Parameters section, and then add optional parameters.
7. Click the **Steps** tab.
8. Beneath the Steps section, click the **Add** link to add the first step of the autosequence event.
9. From the Step Parameters section, select the **Step Type** from the drop-down list.
10. Repeat Steps 9 and 10 to add each step required to run the autosequence event.
11. Select the outcome for each step:
    - **Step on Success**: Select the step number to occur next if a step succeeds. For example, after Step 1 runs successfully, proceed to Step 2.
    - **Step on Failure**: Select the step number to occur next if a step fails. For example, if Step 1 fails, do no proceed with any steps.
12. Click **Save**.

Configuring the Autosequence Event Schedule

1. Select the Enterprise level, click **Configuration**, and then click **PC Autosequence Schedules**.
2. Insert a record for the autosequence schedule (for example, Nightly Batch). If the autosequence schedule record exists, skip this step.
3. Double-click the record to open it.
4. On the **General** tab, enter information in the following fields:

Table 12-9 General Settings Fields

Field	Description
Autosequence	Select the autosequence event from the drop-down list.
Server Name	Enter the name of the server located at the Enterprise level or Hosting Center.
Time Zone	Select the time zone of the Enterprise level or Hosting Center.
Schedule Type	Select the frequency for the autosequence event.
Duration	Select **Enabled** for the autosequence event to run. Select the **Start** and **End dates** for the autosequence event.

5. Click the **Recurrence** tab.

6. From the **Daily** section, enter the number of days for the autosequence event to reoccur. For example, to run the event daily, set this value to Every 1 day(s).
7. From the **Daily Frequency** section, set the time or times for the autosequence event to run.
8. Click **Save**.

Removing Legacy Credit Card Drivers

The following steps describe how to remove legacy credit card drivers from EMC, in order to allow for upgrading from older versions of Simphony. Oracle Food & Beverage provides an Upgrade Eligibility tool for customers that need to remove legacy credit card drivers.

1. On the client system file explorer, navigate to the **Handlers** directory, and run the **UpgradeEligibilityCheck.exe** utility.
2. After the utility finishes checking, it notifies you that there are configuration settings that are preventing an upgrade. Navigate to the **UpgradeEligibilityCheck.log** in the **Handlers** directory and open the file to view the list of detected settings.
3. Make note of the listed legacy payment drivers (and their property/enterprise locations in EMC) in the log file that are preventing the upgrade.
4. In EMC, at the enterprise or property level, navigate to the **Setup** tab and then click **Payment Drivers**.
5. Select the payment driver record(s) that need to be deleted, and then click the **Delete** icon button.
6. Run the **UpgradeEligibilityCheck.exe** utility to verify that there are no additional payment drivers to delete.

Configuring the Loadable PMS Payment Module

Configure a property management system (PMS) payment module for guests to charge meals to a hotel room using Oracle Hospitality OPERA version 5.0.04.01 and later.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Payments**.
2. Insert a record and name it **LoadablePMS**.
3. Double-click the LoadablePMS record to open it.
4. Click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers\Micros.Payment.LoadablePmsModule.dll, and then click **Open**.
6. Click **Save**.
7. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tender Parameters**.
8. On the Configuration tab, select **OPERA** as the **Payment Card Tender**.
9. Click **Save**.

13
Consumer Payments

Simphony lets you accept payments from guests. Guests can pay their checks with a credit card through the handheld terminal that the server uses to take orders.

Configuring Guest Pay

1. Set the Tender Parameters options and enable a credit card payment:
   a. Select the Enterprise, click **Setup**, and then click **Tender Parameters**.
   b. Click the **Guest Pay** tab.
   c. To ensure that guests cannot exit Guest Pay and start using the POS system, deselect (uncheck) **1 - Exit Guest Pay Without ID Prompt**.

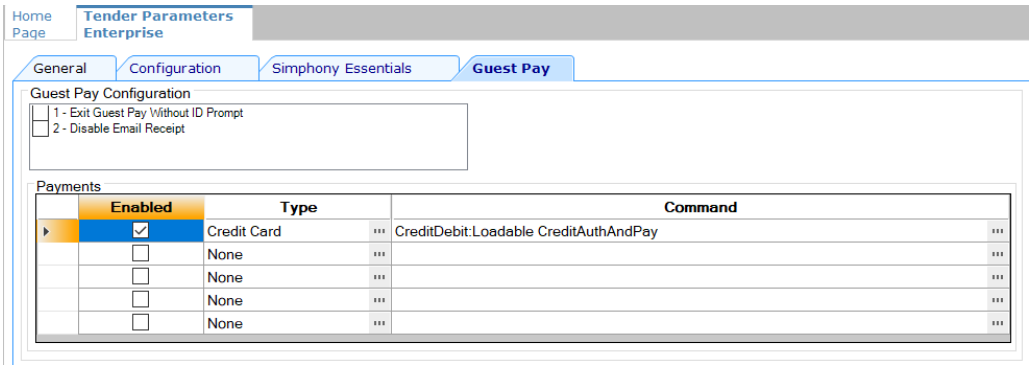
      When exiting from Guest Pay, a dialog will prompt for an employee ID, ensuring that only restaurant servers can use the POS system.
   d. To hide the email receipt option, select (check) **2 - Disable Email Receipt**.

      If you select option **2**, guests will not be able to email their receipt.

      Email receipts must be set up in the Property Parameters module. See Configure Email Receipts for more information.
   e. In the Payments section, click the ellipsis point (...) button in the **Type** column, select **Credit Card**, and then click **OK**.
   f. Click the ellipsis point (...) button in the **Command** column, select the following values, and then click **OK**.
      - **Payment Type**: Select **CreditDebit:Loadable**.
      - **Functions**: Select **CreditAuthAndPay**.

      The following figure shows an example of the Guest Pay credit card configuration in the EMC Tender Parameters module.

Figure 13-1 Guest Pay Configuration



   g. Click **Save**.

2. Configure a service charge for tips to appear on the Employee Tip Report:
   a. Select the Enterprise, click **Configuration**, and then click **Tender/Media**.
   b. Double-click the SPI Tender/Media record that is being used for Guest Pay.
   c. Click the **Options** tab, and then click the **Charge Tip Options** subtab.
   d. Select a **Service Charge** from the drop-down list for Guest Pay tips.
   e. Select **9 - Charged Tip Required**.
   f. Click **Save**.

   If there is no service charge set up, the following error appears when Guest Pay is selected in POS Operations: Please add a charge tip to your credit card tenders to use Guest Pay.
3. To suppress a prompt for tips each time the Tender/Media record is used outside Guest Pay:
   a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
   b. Click the **Options** tab.
   c. Select **46 - Do Not Prompt For Tips (Suppress "Charge Tip Amount is 0.00")**.
   d. Click **Save**.

QR Code Payments

Restaurant guests can pay a check by scanning a QR code on the guest check using their mobile device. After the guest scans the code, the mobile device browser opens, and the guest can enter their payment information. After payment is complete, the check is closed in Simphony and then shows the payment method that was used by the guest.

The following peripheral devices are supported for QR code printing:

- Epson TM-T88 (III, IV, V, VI) Ethernet printers
- Adyen Castles S1F2 onboard terminal printer

Supporting payments through QR codes consists of the following high-level steps:

- Configuring the Enterprise for QR code payments. This is completed by Oracle Hosting and is not explained in this guide. Tasks typically include:
  - Installing or upgrading to Simphony release 19.4.
  - Setting up Reporting and Analytics release 20.1.10 with supporting payment APIs.
  - Setting up the Oracle MICROS Payment Cloud Service (includes merchant account and API details).
  - Enabling Simphony Transaction Services (STS) Gen 2 for the Enterprise.

    A POSAPI workstation for STS must be set up if it does not already exist. See Configuring the Transaction Services Workstation Client for more information.
  - Setting up QR code payment URLs for the Enterprise.
- In the Enterprise Management Console (EMC), configure the property to accept QR code payments, including:
  - Activating QR code payments.
  - Assigning a printer to the STS Gen 2 workstation

- Creating a service total tender media record to print a QR code.
- Creating a workstation button for QR code printing, and associating this button to the new service total tender media record.

Configuring a Property to Use QR Code Payments

1. Activate QR code payments:
   a. Select the Enterprise, click **Setup**, and then click **Enterprise Parameters**.
   b. Click the **Applications** tab, and then select **Activate QR Pay**.

      The system automatically populates the **Oracle Payments Organization Short Code**, **Oracle MICROS Payment Cloud Service**, and **Last Updated** fields.
   c. Click **Save**.
2. Assign a printer to the STS Gen 2 workstation:
   a. Select the property, click **Setup**, and then click **Workstations**.
   b. Double-click the STS Gen 2 workstation record.
   c. Click the **Printers** tab.
   d. Click the **Select** link next to the Guest Check Printer type, select the printer, and then click **OK**.

      If no printers are available, close the Workstations module, configure a printer and assign it to the STS Gen 2 workstation. See Configuring a Printer for more information.
   e. (Optional) Add a backup printer by clicking the **Select** link next to the Backup Printer type, selecting the printer, and then clicking **OK**.
   f. Click **Save**.
3. Set up a service total tender media record that will print a QR code:
   a. Select the property, click **Configuration**, and then click **Tender/Media**.
   b. Add a record or double-click an exiting record.
   c. On the **General** tab, select **Service Total** from the **Key Type** drop-down list.
   d. Click the **Options** tab, and then click the **Printing Options** subtab.
   e. Select **99 - Print QR Pay QR Code**.

      This allows the QR code to appear on the guest check that is printed using this service total tender.
   f. Click **Save**.
4. Add a QR Pay Print button:
   a. Select the property, click **Configuration**, and then click **Page Design**.
   b. Open the transaction page on which to add the QR Pay Print button.
   c. On the **Edit** tab, click in the page area, and then click **Button** in the upper left area to add a button to the layout.
   d. Select **Tender/Media** from the **Type** drop-down list.
   e. Click the black arrow directly beneath the **Type** drop-down list, select the QR Pay Print service total tender media configured in Step 4, and then click **OK**.
   f. Click **Save**.

g. On the POS client device, refresh the workstation database to download the latest EMC configuration changes.

   See **Updating Workstations After Configuration Changes** in the *Oracle MICROS Simphony POS User Guide* for more information.

OPERA Self Pay

This section describes the process in which a guest can pay a check using a tablet device, and an overview for setting up OPERA Self Pay features for Simphony.

The OPERA Self Pay feature is currently supported for OPERA Property Management System (PMS) version 5.6.8.0 or higher and OPERA Cloud version 19.5.0.0 and higher.

After a dining room guest or hotel guest places an order, a server or room service staff member presents a tablet device containing the check to the guest, who can:

- View the check
- Add a tip or change the tip value
- Select a different language
- Charge entire check to a room account
- Enter a room number and guest last name
- Sign the check with electronic signature after authorization
- Enter a valid email address and receive a receipt electronically through email

When a guest charges payment to a room account, Simphony posts the total payment to the OPERA property management system (PMS). The front desk manager can view the payment and signature from OPERA Self Pay in:

- Oracle Hospitality Reporting and Analytics using the Check Query and Audit and Analysis portlets
- Oracle Hospitality Simphony Reports

Check images, including captured electronic signatures, are available through the Oracle Hospitality Reporting and Analytics Check Query and Audit and Analysis portlets.

Complete the following tasks to set up the OPERA Self Pay feature.

- Configure the Tenders
- Configure the Payment Drivers
- Configure the Payment Modules
- Create buttons for the POS Client
- Configure E-mail Receipts
- Configure Languages

Configuring the Room Charge Tender

Configure a room charge tender for guests to charge meals to a hotel room using Oracle Hospitality OPERA.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Insert a record and name it **OPERA Room Charge**.

3. Double-click the **OPERA Room Charge** record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Click the **Options** tab, and then click the **Interface Options** subtab.
6. Configure settings on the subtab as follows:
   - Click the **Interface Link** drop-down and select **0 - None**.
   - Select **38 - Use ISL TMED Procedure Instead of PMS Interface**.
   - Select **39 - Reverse PMS Itemizers On VOID Postings**.
7. Click **Save**.
8. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tender Parameters**.
9. On the Configuration tab, select **4 - PMS** in the **Room Charge Tender** drop-down list.

   This is the Tender/Media record to use for room charges with the OPERA PMS Interface.
10. Click **Save**.

Configuring the OPERA PMS Payment Driver

To configure the Oracle Hospitality OPERA 5 Hotel Property Systems payment driver:

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Payment Drivers**.
2. Insert a record, enter **OPERA PMS Driver** as the name, and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers, select **OperaWSPayment.dll**, and then click **Open**.
6. Click the **Configuration** tab.
7. From the Assembly/Class section, enter information in the following fields:

Table 13-1 Assembly/Class Fields

Field	Description
Description	Enter a description for the payment driver (for example, PMS posting driver for OPERA).
Display Name	Enter the name of the PMS driver (for example, OPERAPMS). This value appears in the **Driver** drop-down list.
Driver ID	Enter **OPERAPMS**.

8. From the Opera Interface Properties section, enter information in the following fields:

Table 13-2 Opera Interface Properties Fields

Field	Description
Connection String	For Opera Cloud, enter **CLOUD**. For Opera version 5, enter the connection string provided. It will look similar to **jdbc / abcde**.
Interface ID	Enter the OPERA interface ID.
Opera Tender Number	Enter the Tender/Media object number mapped for the Room Charge.
Password	Enter the password.
Posting Format	Select one of the following: • **Encoded**: Select to post to OPERA with encoded format in the XML request. The **Encoded** format is used for backward compatibility. Use this format with OPERA version 5.0.04. • **Literal or Empty (by default)**: Select to post to OPERA with plain text format. The room charge will post to OPERA with **Literal** format in the XML request. Use this format with OPERA version 5.0.05.
Resort	Enter the name of the property using OPERA.
UserName	Enter the user name.
Web Service	Enter the URL of the OPERA Web Service.

9. Click **Save**.

Configuring the OPERA Self Pay Button

OPERA Self Pay utilizes the Loadable PMS Payment Module to perform a room charge from the Simphony POS client to the OPERA Property Management System. To configure the OPERA Self Pay button:

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the OPERA Self Pay button.
3. On the **Edit** tab, select the page area in which to define the OPERA Self Pay functions (typically the payment area).
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, and then select **OPERA Self Pay**.

   - (Optional) To have OPERA Self Pay validate payments by only entering a guest's room number instead of a guest's name, enter **NoGuestName** in the Text field.

8. Highlight the OPERA Self Pay button.
9. Click the **OPERA Self Pay Configuration** button. The following steps are optional:
   a. Select **Exit Opera Self Pay Without ID Prompt** when OPERA Self Pay is used on a guest-facing device (such as a kiosk). This allows for the guest to exit to the order screen without employee intervention.

b. Select **Hide Email Prompt Screen** so that the UI does not ask for a guest's e-mail address. If this option is disabled, the option to enter an e-mail address appears for the guest.

c. Select **Enable Tip Screen**, and then enter the **Default Tip Percent** value between 0–99. This tip percentage value is shown to the guest.

10. In the **Select Payment Methods** section, select **Opera** as the payment type from the**Type** drop-down list.
11. Click the **Edit...** link in the Command column.
12. From the Payment Configuration dialog window, select the appropriate payment method from the **Functions** drop-down list.
13. Select the Loadable PMS Driver Payment command **Other1:LoadablePms** from the **Payment Type** drop-down list, and then click **OK**.

Table 13-3 OPERA Self Pay Payment Methods

Type	Command
Opera	**Other1:LoadablePms**: Loadable property management system driver for room charges

14. In the **Style** section, click the arrow to change the color of the button.
15. Position and size the button to the desired area and dimension on the page.
16. Click **Save**.

Configuring the Display of OPERA Guest Package Information

The following steps describe how to set up the display of OPERA Guest Package information.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Payment Drivers**.
2. Create a new Payment Drivers record to support the display of OPERA package information.
3. Double-click the new Payment Drivers record, and then click the **Configuration** tab.
4. In the **Opera Interface Properties** section, enter the details for the following required fields:
   - **Connection String**
   - **Interface ID**
   - **Opera Client ID**
   - **Opera Client Secret**
   - **Opera Tender Media**
   - **Password**
   - **Posting Format**
   - **Resort**
   - **UserName**
5. Click **Save**.

6. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
7. Add a button on the **Transaction Page** called **Display Opera Packages**.
8. Enter the following information in the button configuration section:
    a. Set the **Type** to **Function**.
    b. Click the black arrow beneath the **Type** drop-down list to open the **Edit Command** pop up window.
    c. In the **Name** field, enter **Opera**.
    d. Select **Display Opera Packages** from the**Results** section.
    e. Click **OK**.
9. In the button configuration section, click **Generate Legend**.
10. Click **Save**.

14 Taxes

A tax is a sum of money imposed by a government, levied upon prepared food and beverages sold in a restaurant. The following table explains the Simphony methods of taxation:

Table 14-1 Tax Methods

Tax Method	Description
Value Added Tax (VAT)	A VAT is a form of sales tax used in some countries. VAT is an inclusive tax, which means the tax is included in the menu item price. The global tax type can be set as European or United States. A VAT is calculated differently, depending on the global setting. In Europe, only inclusive type tax is calculated. In the United States, inclusive type tax and add-on type tax can be used at the same time. VAT inclusive taxes are broken out from sales totals on financial related reports (for example, Revenue Center Financial Report or System Financial Report), with the inclusive tax reflected in the Tax Collected totals field. If your property uses VAT, the following Reporting and Analytics templates can be applied for the Open/Closed Check reports: • EAME_MMRevCtrOpenChecks_VAT • EAME_MMRevCtrClosedChecks_VAT
U.S. Inclusive Tax	U.S. inclusive tax uses the item price and a percent value to calculate the tax amount. The tax is then included in the price of each menu item added to the bill. For example, if the tax rate is 5% and the item price is $5.00, the inclusive tax method calculates by the formula: $5.00/(1+5%) = $4.76. The total cost for the customer remains $5.00, but the net sales price is $4.76 and the tax is $0.24. If U.S. inclusive tax is used, only one inclusive tax rate can be applied to a menu item. U.S. inclusive taxes do not appear on the Open Check Report in Reporting and Analytics, and do not print on Open/Closed Check reports. Additionally, inclusive taxes are broken out from net sales totals on financial related reports (for example, Revenue Center Financial Report or System Financial Report), with the inclusive tax reflected in the Tax Collected totals field.
Add-on Tax	Add-on tax uses the item price to calculate tax, which is then added to the bill. For example, if the tax rate is 5% and the item is $5.00, the application calculates 5% of $5.00, posting $0.25 tax to the check and making the total due of $5.25.
Breakpoint or Threshold Tax	Breakpoints establish the points at which an increase of one cent in sales increases tax by one cent. For example, a breakpoint tax might be one percent for sales from zero to twenty cents and then two percent from twenty-one to forty cents. Twenty cents would be the breakpoint for this tax.

Tax Rates and Tax Classes

Simphony uses tax rates and tax classes to assign taxes to menu items, discounts, and service charges.

A tax rate is the percentage at which taxes are paid to a government. In some jurisdictions, multiple tax rates apply. Usually these tax rates must be calculated separately for accounting purposes (allowing each jurisdictional government to collect the appropriate tax amount).

A tax class is a collection of tax rates. Tax classes determine the tax rates that apply to menu items and service charges, and which tax rates can be reduced by discounts. Consider the following example: `2% City Tax Rate + 4% State Tax Rate = 6% Sales Tax (tax class which contains two tax rates)`. In this example, both the city and state tax rates are active for the Sales tax class. The total sales tax is 6%. By grouping multiple tax rates into a single tax class, you can view a record named Sales Tax.

You can associate a tax class with the following types of records:

- Menu Item Class: All menu item definitions in the menu item class are taxed using the tax class.
- Discount: When you assign a tax class to a discount, the taxes linked to the tax class are recalculated when the discount is applied using the reduced taxable sales value.
- Service Charge: Some types of service charges are taxed, such as banquet and room service transactions.

For server convenience, bars often use inclusive taxes. In some properties with multiple revenue centers, it is common that a bar revenue center uses inclusive taxes while a restaurant revenue center uses add-on taxes, even though both revenue centers serve the same items. In this scenario, the configuration of a Liquor tax class might be:

- Inclusive tax rate – 5%
- Add-on tax rate – 5%

Using this scenario, you can set either order types or serving periods to have the appropriate tax rates in the revenue centers. The following table shows an example configuration using Order Types:

Table 14-2 Example of Inclusive Tax with Multiple Revenue Centers

Revenue Center	Order Type Tax Configuration
Bar	• Inclusive tax rate enabled • Add-on tax rate disabled
Restaurant	• Inclusive tax rate disabled • Add-on tax rate enabled

Configuring Tax Rates and Classes

1. Select the Enterprise, property, or zone, click **Setup**, and then click **Tax Rates**.
2. Locate the appropriate tax rate. There are 64 active tax rates.
3. Select the tax rate type from the **Type** drop-down list. The following table describes the tax types:

Table 14-3 Tax Types

Type	Description
0 - Disabled Tax Rate	Select this option if the tax rate is not used.
1 - Add On, Breakpoint	Select this option to calculate the add-on tax using the Breakpoint method.
2 - Add On, Percentage	Select this option to calculate the add-on tax using the tax percentage rate.
3 - Included, Percentage	Select this option to calculate the inclusive tax using the tax percentage rate to determine what portion of the sales price is the tax. The inclusive tax applies differently depending on the global VAT (European or United States). Because the tax is included in the price, the tax is backed out of gross sales on reports.
4 - Surcharge	Select this option to calculate surcharges for items.

4. Click **Save**.
5. Select the Enterprise, property, or zone, click **Setup**, and then click **Tax Classes**.
6. Insert a tax class record with the appropriate name (for example, Soda Tax, Liquor Tax, or Surcharge).
7. From the **Taxes Enabled** field, select the applicable tax rates, and then click **OK**. The tax rates you select are active for the tax class.
8. Click **Save**.

Tax Parameters

The Tax Parameters module enables you to configure options related to taxes. You can configure the Tax Parameters module at the property, zone, or revenue center levels. Configuring Tax Parameters contains more information.

The following tables list all tax parameter options.

Table 14-4 Tax Parameters International Options

International Options	Description
1 - ON = Apply Tax as Add-On; OFF = Apply Tax as VAT	Select this option to treat taxes as add-on. Deselect this option to treat taxes as a value added tax (VAT). If you enable VAT, all tax rates in use must be type **Included, Percentage**.

Table 14-4 (Cont.) Tax Parameters International Options

International Options	Description
3 - Print Tax Itemizers	Select this option to print tax itemizers on guest checks and receipts. An itemizer is considered a bucket that holds the sale amount of all items taxed at a specific rate. At the end of a transaction, the tax is applied to the subtotal of all items in the bucket. Menu Item Classes are linked to Tax Classes, which in turn, are linked to Tax Rates 1-64. When you link to a tax rate, you are creating an itemizer bucket for that item. You must enable this option for Philippine tax.
4 - Enable Canadian GST	Select this option to enable Canadian Goods and Services Tax (GST).
6 - Enable Thailand Tax Printing	Select this option to enable Thai tax options. Starting with the Simphony 19.2.1 release, this option is not in use.
13 - Truncate Inclusive Taxes	This option applies to all inclusive tax calculations. It determines whether the inclusive tax amount that is calculated is rounded or truncated. For example, if a currency has two decimal places and the tax calculated is 12.005, the rounded tax is 12.01, but the truncated tax is 12.00.
14 - Print Item Inclusive Tax Total	If the check contains items with inclusive taxes, this option enables the total inclusive tax to print on the guest check. The line prints according to Tax Parameters option **4 - Print Inclusive Tax Totals when 0.00**. The inclusive tax amount is the sum of the inclusive taxes for each item on the check. You must also select Tender/Media Printing Options **21 - Print Summary Totals** and **24 - Print Inclusive Tax or VAT Lines on Check or Receipt** for the inclusive tax totals to print.
15 - Print Check Inclusive Tax Total	If the check contains items with inclusive taxes, this option enables the total inclusive tax to print on the guest check. The line prints according to Tax Parameters option **4 - Print Inclusive Tax Totals when 0.00**. The inclusive tax amount is calculated on the total sales for each tax rate. You must also select Tender/Media Printing Options **21 - Print Summary Totals** and **24 - Print Inclusive Tax or VAT Lines on Check or Receipt** for the inclusive tax totals to print.
16 - Print Tax Rate per item	Select to print the applied tax rates for each menu item on guest checks, customer receipts, and the journal.
17 - Enable Tax Labels	Select to consolidate tax reporting information based on the defined Tax Labels configured under Tax Rates.

Table 14-5 Tax Parameters Options

Options	Description
1 - Do Not Include Tax in Totals on Tip Reports	Select this option to prevent a transaction's calculated tax amount from posting to the gross receipts and charged receipts totals on tip reports.
2 - Require a Reference Entry with Tax Exemptions	Select this option to require workstation operators to enter a reference entry when using an exempt tax function key.
3 - Print Inclusive Tax Lines Before Summary Totals	Select this option to print inclusive tax total before summary totals on guest checks and customer receipts.
4 - Print Inclusive Tax Totals when 0.00	Select this option to print inclusive totals on guest checks and customer receipts even if the calculated tax due is 0.00.
5 - Print Consolidated VAT Line on Checks and Customer Receipts	Select this option to print a consolidated VAT line. If you use this option in conjunction with individual VAT line printing, the consolidated line prints last.
6 - Print VAT Net Totals on Guest Checks and Customer Receipts	Select this option to print a VAT Net Totals line on guest checks and customer receipts.
7 - Print Tax Exempt Voucher	Select this option to print a voucher when any tax is exempted. The voucher prints when a tax exempt function key or a tender exempts tax. The voucher prints at the validation printer designated for the workstation. Deselect this option to suppress printing of a tax exempt voucher.
8 - Post Taxable Sales When the Tax Rate is Zero	Select this option to have taxable sales post to the TAX_DAILY_TOTAL table in Reporting and Analytics when the tax rate is set to 0.00%. The taxable amounts can be used for reporting even though there are no applied taxes. Deselect this option so that taxable sales do NOT post to Reporting and Analytics when the tax rate is set to 0.00%.
9 - Prorate Tax for Each Combo Meal Menu Item Price as a Percentage of Total Combo Meal Price	Select this option to prorate the menu item price of each combo meal item as a percentage of the total combo meal price in order to apply the correct amount of tax to each item.

Configuring Tax Parameters

Tax Parameters contains a list of all tax parameter options.

1. Select the property, zone, or revenue center, click the **Setup** tab, and then click **Tax Parameters**.
2. Click the **International Options** tab, enable the appropriate options, and then click **Save**.
3. Click the **Options** tab, enable the appropriate options, and then click **Save**.
4. To set printing lines for the appropriate tax rates, select the **VAT Options**, and then click **Save**.

Tax Labels

Setting tax labels allows you to perform the following actions:

- Define up to two tax labels and associate each of them with a specific tax rate
- Associate multiple tax rates with the same tax labels
- Associate a blank tax label with tax exempt items (considered non-value-added tax (VAT))

Configuring Tax Labels

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tax Parameters**.
2. Click the **International Options** tab.
3. Select **17 - Enable Tax Labels**.
4. Click the **Options** tab.
5. To post items with a 0% tax rate, select **8 - Post Taxable Sales when Tax Rate is Zero**.
6. Click **Save**.

Serving Periods

A serving period is a time period during the business day in one revenue center.

When configuring serving period start and end times (in 24-hour HH:MM format), the serving period's start and end times must not overlap.

The following examples illustrate some serving periods start and end times:

- Breakfast (5:00 a.m. to 11:00 a.m.)
- Lunch (11:00 a.m. to 5:00 p.m.)
- Dinner (5:00 p.m. to 10:00 p.m.)

You can run sales reports for serving periods, include the active serving period in interface posting messages, and use serving periods to determine the default transaction screen.

Configuring a Serving Period

1. Select the revenue center, click **Configuration**, and then click **Serving Periods**.
2. Insert a record and enter the serving period name.

   The name is used in Serving Period Reports and is also available as an indicator on the POS client.
3. Select the serving period **Start Time** and the **End Time**. If the serving period lasts all day, use the same start and end times.

   When configuring serving period start and end times (in 24-hour HH:MM format), the serving period's start and end times must not overlap.
4. In the **Table Count** field, enter the number of tables available during the serving period.
5. Select the days of the week when the serving period is active.

6. (Optional) Select the **Default Main Level** to use when the serving period is active.

   The values available in the **Default Main Level** and the **Default Sub Level** fields are set in the RVC Parameters module. Setting the Default Menu Levels for a Revenue Center contains more information.

   Menu Levels contains more information about Menu Level Hierarchy.

7. Select the **Default Sub Level** to use when the serving period is active.
8. Click the **Taxes** tab.
9. Select the tax rates to use when the serving period is active.
10. Click **Save**.

Printing Tax Rate Per Item

You can configure a menu item's tax rate to print on guest checks and customer receipts, and in the journal. The following diagram illustrates a sample customer receipt printed with the tax rates for each menu item, workstation number and transaction number.

Figure 14-1 Sample Guest Check with Tax Rates



Configuring Tax Rates Per Item to Print on Guest Check, Customer Receipt and Journal

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tax Parameters**.
2. Click the **International Options** tab.
3. Select **16 - Print Tax Rate per item** to print tax rates associated with the menu item class on the guest checks and customer receipts. Deselect this option if you do not want the tax rates to print on the guest check, customer receipt, or journal.

   For example, the line item for a Grilled Cheese Sandwich on the printed check appears as follows:

   1 Grilled Cheese 5.99 T2 T4

The guest check and customer receipt indicate the tax rate applied to each item. The T2 and T4 shown after the item's price indicate that tax rates 2 and 4 were applied to a Grilled Cheese.

4. Click **Save**.

Configuring Workstation Number and Transaction Number to Print on Guest Check, Customer Receipt, and Journal

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
2. Click the **Options** tab.
3. Select the appropriate workstation and transaction options.
   - **54 - Print Workstation Number**: Select this option to print the workstation number on the header of guest checks and customer receipts, and in the journal.
   - **55 - Print Transaction Number**: Select this option to print the transaction number on the header of guest checks and customer receipts, and in the journal. The journal header does not contain the legacy transaction number (labeled TRN).
4. Click **Save**.

Configuring Prorated Taxes for Each Combo Meal Menu Item Price as a Percentage of the Total Combo Meal Price

When menu items in a combo meal have different tax rates assigned to them, it may be necessary to prorate the price of each item as a percentage of the total combo meal price. Fiscal requirements may warrant allocating the correct tax amount for each item included in the combo meal.

Enabling this feature requires all combo meal parent, main, and side items to have à la carte prices configured and linked to each of the items' Menu Item Definition record.

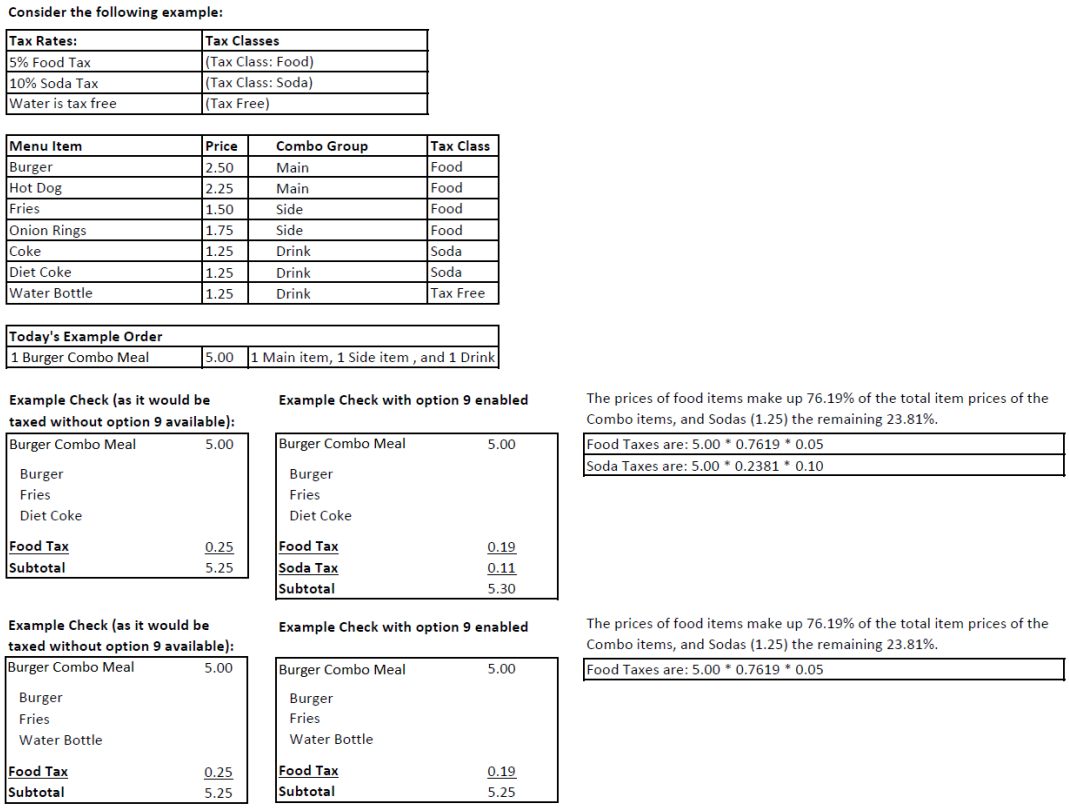
Enabling option **9 - Prorate Tax for Each Combo Meal Menu Item Price as a Percentage of Total Combo Meal Price** affects the amount of tax charged for combo meals based on the tax rates assigned to individual menu items that comprise the combo meal. Each combo meal menu item is assigned a Tax Rate (which is assigned to a Tax Class, which is then ultimately linked to the item in its Menu Item Class setting from each item's Menu Item Definition record).

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tax Parameters**.
2. Click the **Options** tab.
3. Enable option **9 - Prorate Tax for Each Combo Meal Menu Item Price as a Percentage of Total Combo Meal Price**.

   Option **9** supports all of the tax types, as well as Value Added Tax (VAT) configurations (via the Tax Parameters module **International Options** tab).

   All tax totals are tracked and appear on the Tax Summary Report.

Figure 14-2 Examples: View of POS Workstation Check Detail and Guest Check/ Customer Receipt Output with Prorated Tax Calculation Formula



Consider the following example:

Tax Rates:	Tax Classes
5% Food Tax	(Tax Class: Food)
10% Soda Tax	(Tax Class: Soda)
Water is tax free	(Tax Free)

Menu Item	Price	Combo Group	Tax Class
Burger	2.50	Main	Food
Hot Dog	2.25	Main	Food
Fries	1.50	Side	Food
Onion Rings	1.75	Side	Food
Coke	1.25	Drink	Soda
Diet Coke	1.25	Drink	Soda
Water Bottle	1.25	Drink	Tax Free

Today's Example Order		
1 Burger Combo Meal	5.00	1 Main item, 1 Side item , and 1 Drink

Example Check (as it would be taxed without option 9 available):

Burger Combo Meal	5.00
Burger	
Fries	
Diet Coke	
Food Tax	0.25
Subtotal	5.25

Example Check with option 9 enabled

Burger Combo Meal	5.00
Burger	
Fries	
Diet Coke	
Food Tax	0.19
Soda Tax	0.11
Subtotal	5.30

The prices of food items make up 76.19% of the total item prices of the Combo items, and Sodas (1.25) the remaining 23.81%.

Food Taxes are: 5.00 * 0.7619 * 0.05

Soda Taxes are: 5.00 * 0.2381 * 0.10

Example Check (as it would be taxed without option 9 available):

Burger Combo Meal	5.00
Burger	
Fries	
Water Bottle	
Food Tax	0.25
Subtotal	5.25

Example Check with option 9 enabled

Burger Combo Meal	5.00
Burger	
Fries	
Water Bottle	
Food Tax	0.19
Subtotal	5.25

The prices of food items make up 76.19% of the total item prices of the Combo items, and Sodas (1.25) the remaining 23.81%.

Food Taxes are: 5.00 * 0.7619 * 0.05

See the **Combo and Fixed Price Meals** chapter in the *Oracle MICROS Simphony Configuration Guide* for more information about configuring combo meals.

4. Click **Save**.

Surcharges

A surcharge is a preset tax amount that is applied to a menu item. For example, some cities charge a sugar tax for beverages that contain added sugar, such as carbonated soft drinks, sports drinks, and energy drinks.

Configuring Surcharges

1. Create a surcharge tax rate:
   a. Select the Enterprise, property, or zone, click **Setup**, and then click **Tax Rates**.
   b. Insert a record and name it for the surcharge.
   c. Select the **4 - Surcharge** tax rate type from the **Type** drop-down list.
   d. Click **Save**.
2. Create a surcharge tax class:
   a. Select the Enterprise, property, or zone, click **Setup**, and then click **Tax Classes**.
   b. Insert a tax class record and name it for the surcharge.

c. From the **Taxes Enabled** field, select the surcharge tax rate, and then click **OK**.

d. Click **Save**.

3. Configure the Tax Mask:

a. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Order Type Parameters**.

b. Click the ellipsis point (...) button in the **Tax Mask** column, select the surcharge tax rate for the order type, and then click **OK**.

c. Ensure that **Active** is enabled for the order type with the surcharge tax rate.

d. Click **Save**.

4. Configure the serving period for the tax rate:

a. Select the revenue center, click **Configuration**, and then click **Serving Periods**.

b. Insert a record and enter the serving period name, or select an existing serving period.

c. On the **Taxes** tab, select the surcharge tax rate

d. Click **Save**.

5. Change the Menu Item Class to the surcharge tax class:

a. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.

b. Double-click the menu item class.

c. On the **General** tab, select the surcharge tax class from the **Tax Class** drop-down list.

d. Click **Save**.

6. Configure the surcharge for the Menu Item Definition record:

a. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.

b. Double-click the menu item master record corresponding to the definition to open it.

c. Click the **General** tab, and then enter the surcharge for the menu item in the **Surcharge** field.

d. Click **Save**.

Configuring the Menu Item Tax Class Override

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Menu Item Groups**.
2. Insert a record and name it for the tax class override.
3. Double-click the record to open it.
4. Select **2 - Tax Override** from the **Group Type** drop-down list in the Group Type Configuration section.
5. Enter the **Threshold Quantity**.

- The base tax class setting is applied if the quantity of an ordered menu item is below the designated threshold value.
- You can use the Menu Item Definition **Quantity** field to contribute (or add to) to the Menu Item Group module's Threshold Quantity value. Once the Threshold Quantity setting has been reached or exceeded, the previous base tax class setting is

overridden by the tax class assigned to the Menu Item Group record. See Configuring Menu Item Definitions for more information.

- For **Add-on taxes**, the overall price of an item changes when the threshold is met or exceeded.
- For **Inclusive taxes**, only the tax rate changes when the threshold is met or exceeded.

6. From the **Tax Class Override** drop-down list, select the desired tax class override.

   You can use the lookup function for tax class override, which opens the Tax Classes module.

   Tax Rates and Tax Classes contains more information.

7. You must add all menu items to a specific Menu Item Group to which you want to apply a tax class override. In the **Include** section, click **Add** to assign menu items (or range of items) that you want to be able to apply to this particular tax class override.
8. Select information for the fields described in the following table:

Table 14-6 Include Fields

Field	Description
Type	Select **4 - By Menu Item**. This the only option that is applicable as an included item for tax class override. An error message appears if you select family group or major group.
Start #	Click in this field, and then enter the start item.
End #	Do not enter anything in this field.
See Items and Select	Click the link, select the item or item range in the See Items and Select dialog, and then click **OK**.
Range	Items selected in **See Items and Select** appear in this field.

9. If a menu item or menu item range was entered in error or is no longer needed, select the row, and then click **Delete**.
10. Repeat Steps 7 through 9 as needed.
11. Click **Save**.

Configuring the Parent Item Tax Class Override

There are some locations where food is taxed differently based upon its preparation. For example, a whole bagel is not taxed. However, a bagel that is sliced in two, or warmed up is taxed. In both cases, the bagel's status changes from non-prepared to prepared - resulting in a tax change.

The configuration described here is only meant for condiment menu items. A condiment item can be configured to override a parent item’s tax class on all menu items associated with the condiment. The condiment only applies to the item to which it is added; the condiment does not change the taxes for the entire check, nor for items not associated with the parent item.

Preparation instructions, such as *sliced* and *warmed*, can be configured as condiment items in the EMC, and then workstation operators can add them to the parent item on the POS workstation.

To configure condiment items with a parent item tax class override:

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, click **Menu Item Maintenance**, and then search for and select a **Menu Item Definition** record.
2. Double-click the Menu Item Definition record to open it.
3. Click the **Prices** sub-tab.
4. Under the **Parent Tax Class Override** column, select the tax class to apply to the parent item if this condiment changes how that item is taxed.

> **Note:**
>
> Since this configuration is meant for only condiment menu items, the Parent Tax Class Override column is grayed out for regular menu item records, and is not configurable.

When the Parent Tax Class Override column is set to a valid tax class, there are two available options to drive the behavior of the parent tax class if there is a conflict with an existing menu item tax class override. To access these options, remain on the Prices sub-tab.

5. Click the ellipsis (**...**) under the **Options** column to configure the following options:
   - **3 - Use Menu Item Group Tax Class Override instead of parent Tax Class Override** - Select if this condiment causes the parent item to use the Menu Item Group Tax Class Override instead of the parent item Tax Class Override.
   - **4 - Exclude parent from Tax Override Threshold Quantity** - Select if this condiment causes the parent item to not count toward the Tax Override Threshold Quantity in Menu Item Groups.
6. Click **Save**.

Configuring Australian Goods and Services Tax (GST)

The Australian Goods and Services Tax (GST) is a Value Added Tax (VAT) on the supply of goods an services in Australia. It was introduced by the Australian Federal Government with the “A New Tax System (Goods and Services Tax) Act 1999”, which took effect on July 1, 2000.

In Australia, restaurant businesses that registered for GST must include GST in the price charged for their goods and services. Restaurants may claim credits for the GST included in the price of goods and services they buy for their business. The goods and services sold in Australia are taxable, with the exception of goods and services deemed GST-free.

In restaurants, the tax percentage calculated on items is either **10%** or **0%** based on the category of the item, the order type, or both. The sum of all GST a customer pays always appears on the check, and the receipt indicates the amount that is GST.

Simphony integrates the Australian GST by:

- Displaying the total GST tax for all items purchased, on the customer receipt
- Marking all GST-free menu items with an asterisk

- Printing a customer receipt that displays the total GST tax for all items, when a check exceeds the first configured threshold
- Printing a customer receipt that displays the Customer Name or Australian Business Number (ABN) on the receipt (along with the total GST tax). when a check exceeds the second configured threshold

The topics in this chapter apply to Australian clients who use Reporting and Analytics version 9.1 and Reporting and Analytics version 20.1.9.5 or later.

- For clients who use R&A version 9.1 for reporting, see the Oracle MICROS Reporting and Analytics User Guide 9.1 for more information.
- For clients who use R&A version 20.1.9.5 or later for reporting, see the Oracle MICROS Reporting and Analytics User Guide 20.1 for more information.

Configuring Taxes for GST

The following steps explain how to configure the Tax Rate, Tax Class, and Tax Parameters for Australian GST.

1. In EMC, click **Setup**, then in the **Taxes and Order Types** section click **Tax Rates**.
2. Choose the desired Tax Rate record to configure, and enter the name as **GST 10%**.
3. In the **Type** column, select **3 – Included, Percentage**.
4. In the **%** column, enter the percentage value **10**.
5. Click **Save**.
6. On the EMC home page, click **Setup**, then in the **Taxes and Order Types** section click **Tax Classes**.
7. Create a Tax Class for GST, enter a relevant name, and then enable **1 – GST 10%** in the Taxes Enabled section.
8. Click **Save**.
9. On the EMC home page, click **Setup**, then in the **Taxes and Order Types** section click **Tax Parameters**.
10. Click the **International Options** tab and enable the following options:
    - **1 – On = Apply Tax as Add-On**
    - **18 – Enable Australian GST, Post Inclusive Tax to Net Sales Totals**

    > **Note:**
    >
    > Option 18 must remain disabled for Australian GST, if R&A 9.1 is used for reporting.

11. Click **Save**.

Configuring Order Types for GST

The following steps describe how to configure Order Types in EMC for Australian GST.

1. In EMC, click **Descriptors**, and then in the **Miscellaneous** section click **Order Types**.
2. Configure two Order Type records with the following names:

- Order Type 1 = **Dine-in**
- Order Type 2 = **Takeaway**

3. Click **Save**.
4. On the EMC home page, click **Setup**, and then in the **Taxes and Order Types** section click **Order Type Parameters**.
5. In the Order Type Parameters module, set **Dine-In** and **Takeaway** as active.
6. For both Order Types, click **...** in the **Tax Mask** column, and then enable the tax.
7. For the **Takeaway** order type, click **...** in the **Options** column, and then enable the option **11 – Forgive Inclusive Tax**, alongside other options as needed.
8. Click **Save**.

> **Note:**
>
> Simphony uses the label of the first tax rate linked to the first active order type, to print the GST label on guest checks and customer receipts.

Configuring Format Parameters for GST

The following steps describe how to configure Format Parameters for Australian GST

1. In EMC, click **Setup**, then in the **Parameters** section click **Format Parameters**.
2. In the Format Parameters module, click the **Options** tab.
3. Enable the option **61 – Enable to show and print Tax Forgiven Indicator**. This option controls the following:

   For clients using R&A 20.1 and later:

   - Displaying an asterisk (*) next to tax forgiven menu items
   - Printing the tax rate name with the tax value
   - Printing the GST Taxable Total with the total taxable amount

   For clients using R&A 9.1:

   - Displaying an asterisk (*) next to tax forgiven menu items
   - Printing the tax inclusive information (e.g. xx.xx Inclusive Tax in Total yy.yy), and tax forgiven information on the check or customer receipt.
4. Click the **Configuration** tab.
5. In the **Print Tax invoice after Sales Threshold** field, enter the appropriate dollar amount. This threshold prompts the workstation operator to print the check if it exceeds the set dollar amount.
6. In the **Print Customer Information after Sales Threshold** field, enter the appropriate dollar amount. This threshold prompts the workstation operator to enter the Customer Name or Australian Business Number (ABN) so that it prints on a check.
7. In the **Customer/Trade Identity Label** field, enter **Customer Name/ABN**
8. Click **Save**.

Configuring Serving Periods for GST

The following steps describe how to configure the Serving Period for Australia GST. These steps are only required if your system is configured with serving periods.

1. In EMC, select your **Revenue Center**, click **Configuration**, and then in the **Reporting and Data** section click **Serving Periods**.
2. In the **Taxes Enabled** column, enable the tax rate for each Serving Period.
3. Click **Save**.

Configuring Menu Item Classes for GST

The following steps describe how to configure Menu Item Classes for Australia GST.

1. In EMC, click **Configuration**, and then in the **Menu Items** section click **Menu Item Classes**.
2. Click the **Options** tab.
3. For each Menu Item Class eligible for forgiving the inclusive tax when the **Takeaway** order type is selected:
   a. Link the appropriate Tax Class.
   b. Enable the option **78 – Forgive Inclusive Tax**.
4. For each Menu Item Class for Menu Items that are always taxable, even when the **Takeaway** order type is selected:
   a. Link the appropriate Tax Class.
   b. Do not enable the option **78 – Forgive Inclusive Tax**.
5. For each Menu Item Class for Menu Items that are always GST Free:
   a. Do not link a Tax Class.
6. Click **Save**.

Configuring Menu Items for GST

The following steps describe how to configure Menu Items for Australia GST.

1. In EMC, click **Configuration**, and then in the **Menu Items** section click **Menu Items**.
2. For Menu Items that are designated as GST free:
   - Select a Menu Item Class with no associated Tax Class

     OR
   - Select a Menu Item Class associated with a Tax Class linked to a 0% Tax Rate
3. For Menu Items that always include GST (for either order type):
   - Select Menu Item Classes that have the option **78 – Forgive Inclusive Tax** disabled.
4. For Menu Items that include GST for Dine-in, but are GST-free for Takeaway:
   - Select Menu Item Classes that have the option **78 – Forgive Inclusive Tax** enabled
5. Click **Save**.

Configuring Discounts for GST

The following steps describe how to configure Discounts for Australia GST.

1. In EMC, click **Configuration**, and then in the **Sales** section click **Discounts**.
2. Select and link the Australian GST tax classes for all discounts.
3. Click **Save**.

Configuring Tender/Media for GST

The following steps describe how to configure Tender/Media for Australian GST.

1. In EMC, click **Configuration**, and then in the **Sales** section click **Tender/Media**.
2. Select the desired Tender/Media record.
3. Click the **Options** tab and then click the **Printing Options** tab.
4. For clients using R&A 20.1.9.5 and later for reporting:

   Enable the option **24 – Print Inclusive Tax or VAT Lines on Check or Receipt**. This option must be enabled for payment tenders.

   > **Note:**
   >
   > In order to print GST tax information, the Format Parameters option **61** and the Tax Parameters international option **18** must be enabled.

5. For clients using R&A 9.1 for reporting:

   Enable the option **24 – Print Inclusive Tax or VAT Lines on Check or Receipt**. This option must be enabled for payment tenders.

   > **Note:**
   >
   > In order to print GST tax information, the Format Parameters option **61** must be enabled.

6. For clients running Simphony versions 19.3.2 or earlier:

   Enable the following options:

   - **22 – Print Guest Check Trailer for all “Payment” tender types**
   - **28 – Print Guest Check Trailer on Fast Transaction Customer Receipt for all “Payment” tender types**

7. Click **Save**.

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Order Types

An order type is a sales category, such as Dine In or Take Out. You can set up to thirty-two order types for each location. Order types control active tax rates for a transaction and help to reduce theft in fast transaction environments. You can specify order types at three different levels of a transaction, as described in the following table: Transaction, Check, and Menu Item.

Table 15-1 Order Types

Order Type	Description
Transaction Order Type	This is the order type of the current round. If the workstation operator changes the transaction order type, the order type of all menu items in the current round changes to the selected order type while the order type of the check remains unaffected. A reference entry with the name of the changed order type appears at the top of the menu items.
Check Order Type	The active check order type appears in the check detail header. When option **16 - Post to Check Order Type** is enabled (in the RVC Parameters module **Posting** options), and the menu item order type is different from the active check order type, menu item sales post to the check order type on financial reports, even if the **Menu Item Order Type** function is used and will result in a different order type. When option **16 - Post to Check Order Type** is disabled, and the menu item order type is different from the active check order type, menu item sales post to the menu item order type on financial reports. For example, a Dine In guest wants to take a dessert home, so the server changes the dessert item's order type to Take Out. Doing so may have tax rate implications, as well as notifying the prep station to package the dessert for carry out. In this instance, if option **16** is disabled, the dessert posts to the Take Out order type totals on the financial reports.
Menu Item Order Type	This is the order type of the menu item and also affects the condiments of the menu item. The workstation operator can change the order type of an entire combo meal or selected items in a combo meal. A reference entry appears with the name of the order type beneath the menu item to which the change was made. If the workstation operator consolidates menu items, changing the menu item order type affects all consolidated items. When the workstation operator changes a condiment order type, it applies to the parent menu item. Review the Check Order Type information (in the row directly above) for information about how **Posting** option **16 - Post to Check Order Type** in the **RVC Parameters** module affects order types and their reporting totals.

Order Type Subtotal Security Option

In a fast transaction environment, you can increase security and reduce theft by restricting the workstation operators' ability to perform voids and cancel transactions, while still allowing

operators to perform legitimate error corrections. Simphony allows you to suppress the check total on the workstation until the workstation operator presses an order type key that functions as a subtotal. The following table describes the type of theft that can be prevented using the subtotal security.

Table 15-2 Subtotal Restriction Scenarios

No Order Type Subtotal Keys	Using Order Type Subtotal Keys
• Workstation operator begins transaction. • Customer orders hamburger and soda. • Workstation operator sees the total as $4.78 and requests the payment amount from the customer. • The customer gives $4.78 in cash. • Workstation operator pockets the cash and voids the items or cancels the transaction.	• Workstation operator begins transaction. • Customer orders hamburger and soda. • Workstation operator does not see the total amount due, and must press one of the **Order Type** function keys to view the subtotal. • The customer gives $4.78 in cash. • Workstation operator cannot void items or cancel the transaction after pressing the **Order Type** key. After pressing the **Order Type** key, the items ordered are considered previous-round items for voiding purposes. Typically, only managers can perform previous-round voids. If the workstation operator adds another menu item after pressing the **Order Type** key, the Summary Totals are hidden until an Order Type is declared again. The workstation operator can perform error corrections on items that were ordered since the Order Type key was pressed, but cannot perform error corrections on items before the Order Type declaration.

Configuring Order Types

1. Select the Enterprise, property, or zone, click **Descriptors**, and then click **Order Types**.
2. In the **Text** field, enter an order type for each record (for example, Dine In, Take Out, Drive Thru).
3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Order Type Parameters**.
5. For each order type record, select the appropriate options as described in the following table:

Table 15-3 Order Type Options

Option	Description
1 - Print on Customer Receipt and Guest Check	Select this option to print the order type name on customer receipts and guest checks.
2 - Print on Order Printer	Select this option to print the order type name on order printers.

Table 15-3 (Cont.) Order Type Options

Option	Description
3 - Enable Guest Count by Menu Item in Transaction Services	Select this option to enable transaction services to count guests like POS operations. This option must be enabled along with Menu Item Classes option **11 - Add to Guest Count** in order for the guest count to be incremented.
4 - Do Not Post Transactions to Tip Report Totals	Select this option to exclude sales for the order type from Tip Report Totals.
5 - Perform Auto Combo Recognition	Select this option to have workstations automatically perform auto combo recognition when the workstation operator changes the workstation to the order type.
6 - Transaction Cancel Default	Select this option when starting orders without an order type. When a workstation operator begins a transaction and cancels it before selecting an order type, the POS client requires the workstation operator to associate the check with an order type for posting purposes. The POS client finds the first order type that has this option selected and uses it. Deselect this option to have the POS client use the first order type record in the list to associate with the check.
8 - Enable Routing Order by Order Type	Select this option to control order routing by the order type. Deselect this option if you are using Dynamic Order Mode (DOM) on KDS Displays as it is not compatible.
9 - KDS Allow Item Print on Item All Prep Done	See **Printing Runner Chits by Order Type** in the *Oracle MICROS Simphony KDS Configuration and User Guide* for more information.
10 - Suppress Dining Course	See **Suppressing Dining Courses from Orders** in the *Oracle MICROS Simphony KDS Configuration and User Guide* for more information.
11 - Exempt Inclusive Tax	Select this option to exempt the inclusive tax for take away order types.
12 - Always Use KDS Prep Time	See **Setting the Relative Capacity Used By Each Menu Item** in the *Oracle MICROS Simphony KDS Configuration and User Guide* for more information.

6. Click the ellipsis point (**...**) button in the **Tax Mask** column, select the tax rates for the order type, and then click **OK**.

   If you are creating an order type for a delivery service provider (for example, Uber Eats, Deliveroo, or DoorDash), do not select any tax rates in the **Tax Mask** column.

7. Select **Active** for each order type that you want to activate.

8. Set the desired **Service Level Time** value (in minutes) for each active order type.

   The Service Level Time setting supports the ability to set a pickup time for placed orders. It allows for a requested order to be prepared within an allotted timeframe, ensuring that orders are made ready for pickup by customers or a delivery service. The value set in this column for active order types signifies the preparation time (in minutes) for a given order.

9. Click **Save**.

10. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
11. (Optional) Select the **Default Order Type** from the drop-down list. This is the order type that is active when a workstation operator begins a check.
12. Click **Save**.
13. To override the default order type setting for a workstation:
    a. Select the property, click **Setup**, and then click **Workstations**.
    b. Click the **Transactions** tab.
    c. Select the **Default Order Type** from the drop-down list.
    d. Click **Save**.

Configuring Order Types as Subtotal Keys

You can allow the Order Type keys in the revenue center to act as Subtotal keys. After pressing the Order Type key, the items ordered are considered previous-round items for voiding purposes. This is a security option to prevent fast transaction operators from voiding items after viewing the check subtotal.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Control Parameters**.
2. Click the **Options** tab.
3. If you do not want summary totals (subtotal, tax, amount due, and change due) to appear on the workstation until the workstation operator presses an **Order Type** key, select **8 - Display Summary Totals Only After Order Type Declared**.
4. Click **Save**.

Configuring Touchscreen Buttons for Order Types

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the order type buttons, and then on the Edit tab, select the page area in which to define the buttons.
3. Click **Button**.
4. To configure a menu item order type button:
    a. On the General subtab, select **Menu Item Order Type** from the **Type** drop-down list
    b. Click the black arrow directly beneath the **Type** drop-down list, select an order type from the list, and then click **OK**.
5. To configure a transaction order type button:
    a. On the General subtab, select **Transaction Order Type** from the **Type** drop-down list
    b. Click the black arrow directly beneath the **Type** drop-down list, select an order type from the list, and then click **OK**.
6. To configure a check order type button:
    a. On the General subtab, select **Order Type** from the **Type** drop-down list
    b. Click the black arrow directly beneath the **Type** drop-down list, select an order type from the list, and then click **OK**.

7. Enter a **Legend** for the button, and then position and size the button on the page.
8. Click **Save**.
9. Repeat Steps 3 through 8 to configure more order type buttons.

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Discounts

You can activate a discount using the methods described in the following table:

Table 16-1 Discount Methods

Discount Method	Description
Manual	A workstation operator manually applies a discount to a check by pressing a discount key. This is a traditional discount method.
Automatic	Simphony applies an automatic discount when a transaction meets certain criteria. As a workstation operator adds menu items to the guest check, Simphony detects items that trigger a discount, and then applies the discount to the check.
Coupon	A coupon is an automatic discount with one difference: the workstation operator must first apply the discount (coupon) to the guest check. Coupon discounts do not require trigger menu items on the transaction when entering the coupon. The coupon discounts the check if trigger menu items are added before or after the coupon is entered. The coupon is applied only when the menu items are ordered and it is not excluded by the presence of a better deal.
Combination Pricing	A combination pricing discount charges a single price for multiple items when they appear on a check at the same time. Restaurants use this type of discount in combo meal scenarios such as Burger, Fries, and Soda are $3.25. Configuring a Combination Pricing Discount contains instructions to set up combination pricing discounts.

Manual Discounts

Workstation operators can manually apply a discount to a transaction. You can configure manual discounts as:

- Subtotal discounts
- Item discounts

Subtotal Discounts

All discounts are subtotal discounts by default. That is, the discount applies to all items on a check that belongs to a menu item group or itemizer group affected by the discount. Subtotal discounts are item discounts that apply to multiple items. The amount of a subtotal discount is allotted to all items to which the discount applies. For example, a $3.00 discount that applies to two items will discount each item by $1.50. Workstation operators can add a subtotal discount any time during the transaction, and the subtotal discount is applied to all trigger items that are already on the check. New items added after applying the discount are not discounted.

Item Discounts

An item discount applies to only one item. Item discounts apply to any menu item that belongs to a Menu Item Class with option **7 - Item Discounts May Be Applied to these Menu Items** set. Discount Itemizers and Menu Item Groups are not applicable for item discounts. Workstation operators must add an item discount immediately after adding the menu item to discount.

Automatic Discounts

The workstation automatically applies discounts to a guest check based on conditions within the transaction and without workstation operator interaction. For example, a property may run a promotional sale: buy one DVD and receive one CD for free. In this situation, whenever both a CD and a DVD appear on a single transaction, a 100% discount applies to the CD. There are several automatic discount types. This scenario is just one example of an automatic discount configuration.

Automatic discounts and coupon discounts use the following Menu Item Groups to determine which items receive a discount:

- Trigger Menu Item Group: Trigger menu items are the menu items that trigger a discount award. A Trigger Menu Item Group contains at least one item that initiates a discount. For example, in a Buy a DVD, get a CD example, the DVD is in the Trigger Menu Item Group. When a workstation operator adds the minimum quantity of items (1) from this menu item group (DVD), items from the Award Menu Item Group are discounted based on the award configuration for the discount.
- Award Menu Item Group: The Award Menu Item Group is the Menu Item Group to be used as the award group. An Award Menu Item Group contains at least one item to receive a discount. For example, in the Buy a DVD, get a CD example, the CD is in the Award Menu Item Group. When a workstation operator adds the minimum quantity of items from the Trigger Menu Item Group, items from this Award Menu Item Group are discounted based on the award configuration for the discount. As another example, in a Buy-One-Get-One scenario, such as Buy one DVD and get one CD for 50% off, set the Award Menu Item Group to CDs and the Percent Off to 50.

A menu item can be in both the trigger and award groups.

Simphony uses several other factors to determine the automatic discount amount:

- Automatic Discount Rules
- Awarding Algorithms
- Discount Award Types
- Discount Exclusivity

Automatic Discount Rules

Various algorithms (known as Automatic Discount Rules) determine how Simphony calculates a discount. The following table explains the Automatic Discount Rules:

Table 16-2 Automatic Discount Rules

Automatic Discount Rule	Description
Item Price Substitution	The discount is applied when the **Minimum Quantity** has been satisfied. If the **Minimum Quantity** is not met, the normal item price applies. When the **Minimum Quantity** is set to 1, the **Max Count** is equal to the number of items awarded. When the **Minimum Quantity** is set to a value greater than 1, the **Max Count** field applies to groups of awarded menu items. When set, the **Max Count** field affects which items get the reward. A value of 0 indicates that the discount applies to an unlimited number of items. This discount rule is used in scenarios such as: • All Beverages are half-price on Tuesday • If you order three or more hamburgers, they are 20% off • Candy bars are 10% off • Candy bars are 50 cents off • Candy bars are $1 each The Item Price Substitution discount rule is more complex than the Sales Price rule.
Quantity Threshold	Use a Quantity Threshold discount when the number of items added triggers a discount, and the awarded items are different than the trigger items. The discount is applied when the **Minimum Quantity** has been satisfied. When the workstation operator adds the configured number of items from the **Trigger Menu Item Group**, the discount award is applied. For example, to configure a scenario where every three shirts purchased awards a free tie, set the **Minimum Quantity** value to 3, the **Trigger Menu Item Group** as the Shirt group, the **Award Menu Item Group** as the Tie group, and the **Award Count** to 1. This discount rule can be used for Buy-One-Get-One scenarios, such as Buy one DVD and get one CD for 50% off, or Buy two entrees and a dessert is free.
Total Price Threshold	Use a Total Price Threshold discount when the total price of items triggers a discount. This discount is similar in operation to Quantity Threshold, except that Total Price Threshold looks at the total price of the trigger items rather than the quantity of items on the transaction. This discount rule is used for scenarios such as 15% off all purchases of $200 or more.
Combination Pricing	Use a Combination Pricing discount to include each combo item to apply the discount. Workstation operators must add at least two of an item before a discount can be applied. This discount rule is used for combination meals, such as when a hamburger, fries, and soda are applied on one check, charge $4.00.

Table 16-2 (Cont.) Automatic Discount Rules

Automatic Discount Rule	Description
Sales Price	This discount rule is similar to Item Price Substitution, but it is easier to configure. Sales Price discounts have no **Minimum Quantity** or **Max Count** associated, always apply before another discount, and cannot be replaced by a better deal. Use this discount rule for All hamburgers are $2.00 on Wednesdays, without configuring **Minimum Quantity** of trigger items or **Max Count** per check.

Awarding Algorithms

The better deal always wins with automatic discounts. For example, if you set both Buy One DVD Get One CD For Free and Buy One DVD Get One Car For Free, the application discounts the price of the car to $0.00 because this is a better deal than receiving a CD for $0.00.

When using automatic discounts, Simphony detects the presence of discountable menu items on a transaction, and then performs algorithms to determine which discounts are applied and which items receive a discount. The following two types of algorithms determine the discount:

Table 16-3 Awarding Algorithms

Awarding Algorithm	Description
Best Deal for Customer	If two discounts can be applied to a check and one yields a higher discounted amount, that discount is said to give the best deal. If two discounts can be applied to a check, and the order in which they are applied yields a different amount, the ordering which gives the customer the highest discount is said to give the best deal. Each automatic discount type provides the best deal for the customer, which means that the workstation scans all menu items and determines the largest discount to apply. In this example, a common best deal scenario is described as follows: • A combo discount is configured so any Pants-and-Shirt purchase is $30. • If a customer orders a $25 pair of pants and a $20 shirt, the discount is $15: – $25 for a pair of pants, $20 for a shirt = $45 – The combination price is $30, so the discount is $15. • If the customer then orders a $25 shirt, the discount recalculates: – $25 for a pair of pants, $25 for a shirt = $50 – The combination price is $30, so the discount is $20. In this example, the higher-priced shirt is discounted, so the customer receives a total discount of $20 instead of just $15. This is the calculation for all automatic discounts and you cannot configure it (except for Quantity Threshold Discounts). By default, the POS client considers all menu items on the check and all discounts that can apply, and creates the largest discount possible for the customer.
Best Deal for Merchant	You can configure Quantity Threshold Discounts to provide the best deal for the merchant, which means that the customer receives the lowest possible discount. Some jurisdictions require this configuration.

Figure 16-1 Examples of Best Deals for Merchant and Customer

```
-- Ex 1: Best for Customer --
  Filet           20.00
  Chicken Dinner  15.00
  Spaghetti       10.00
  Discount        -7.50
```

```
-- Ex 2: Best for Merchant --
  Filet           20.00
  Chicken Dinner  15.00
  Spaghetti       10.00
  Discount        -5.00
```

Consider this discount: Buy one entree and get a second (of equal or lesser value) for 50% off. The examples show the different calculations of the discount based on the best deal configuration.

- In Example 1, the Filet is the most expensive item, so it is the trigger. The Chicken Dinner is more expensive than the Spaghetti, so it is discounted by 50%. The total discount is $7.50.
- In Example 2, the Filet is the most expensive item, so it is the trigger. The Spaghetti is the least expensive entree, so it is discounted by 50%. The total discount is $5.00.

Discount Award Types

An award type identifies the discount that customers receive. The following table describes the three discount award types in Simphony.

Table 16-4 Award Types

Award Type	Description
Percent Off	This award type is used when all menu items in the Trigger Menu Item Group (Item Price Substitution discounts) or in the Award Menu Item Group (Threshold discounts) are to receive a percent discount. You can use the Percent Off award type for discounts such as All sodas are 50% off on Tuesdays or Get 15% off all shirts for purchases of $80 or more. Simphony calculates this type of award as a percent of the sales total. For example, if the item is $10.00 and the discount is 20%, the discount amount is $2.00. The amount owed is reduced to $8.00.
Amount Off	This award type is used when all items in the Trigger Menu Item Group (Item Price Substitution discounts) or in the Award Menu Item Group (Threshold discounts) are to receive a flat amount discount. You can use the Amount Off award type for discounts such as All sodas are $1.00 off on Tuesdays or Save $25 on shirts for purchases of $150 or more on pants. Simphony calculates this type of award as a fraction of the sales total. The discount awarded cannot be greater than the Amount Off value. The Amount Off is subtracted from the item's price. For example, if the item is $10.00 and the Amount Off is $3.00, the discount amount is $3.00. The amount owed is $7.00. Items are not discounted below 0.00; if an item's price is $5.00 and the Amount Off is set to $9.00, the amount owed is $0.00. Amount Off Examples contains more complex examples of the Amount Off award type.

Table 16-4 (Cont.) Award Types

Award Type	Description
Amount Substitution	This award type is used when all items in the Trigger Menu Item Group (Item Price Substitution discounts) or in the Award Menu Item Group (Threshold discounts) are to be charged a fixed amount. You can use the Amount Substitution award for discounts such as All sodas are $2.00 on Tuesdays or Buy $80 of shirts and receive up to 3 pairs of pants for $15.00 each. The amount is substituted for the original price of the item. For example, if the item is $10.00 and the amount substitution is $5.99, the discounted item's price is $5.99. Calculations do not change with whole numbers. For decimal values, Simphony calculates what percent of the parent item the original substitution price was, and applies that percent discount to the new decimal quantity. Amount Substitution contains more complex examples of the Amount Substitution award type.

Discount Exclusivity

Exclusivity stops all discounts from applying to a check at once. Discount exclusivity controls how multiple discounts interact with each other. You can configure discounts to be exclusive to the following:

- Per transaction
- Per menu item
- Based on workstation operator-defined groups

In short, discount exclusivity stops discounts from applying multiple times to the same items.

Discount exclusivity applies in these situations:

- A senior citizen discount coupon cannot be used at the same time as a 25% off all items discount.
- A Buy One Get One Free discount cannot be applied to a transaction that also has a Buy $100, Get 25% Off Discount.
- The customer's 10% coupon cannot be applied to items that receive the Happy Hour discount.

You can configure two types of discount exclusivity: simple exclusivity and group exclusivity. Simple exclusivity is easier to use and configure. Group exclusivity yields greater flexibility, but at the price of complexity. Simple Exclusivity and Group Exclusivity contain more information about these types of discount exclusivity.

Automatic discounts always recalculate after the workstation operator adds or removes an item from a guest check. Because of this, automatic discounts are always applied after manual discounts. Consider the following example:

- The revenue center is configured with automatic discounts enabled in the RVC Parameters module.
- One automatic discount is active: all food is 10% off.

- A manual discount is configured, and it allows the 10% off all food discount to be on the check at the same time as the manual discount.
- The operator orders $20 of food.
- The automatic discount applies on the check for $2.

If the workstation operator then adds a manual discount for $5.00 off, the discount changes:

- All automatic discounts are removed (this occurs internally on the workstation but is listed here to explain the logic)
- The check's total is $15.00 ($20.00 minus the $5.00 manual discount)
- The 10% automatic discount is applied for $1.50, taking the check's total to $13.50

Because of the scenario described here, it is not possible to get a better deal when combining automatic and manual discounts. Either the discounts can both be on the check (as in this example) or the manual discount is not allowed (if the automatic discount is exclusive to the manual discount). Thus, to use manual discounts and automatic discounts in the same environment, configure the discounts that would normally be manual as automatic coupon discounts, which follow the best deal rules of the Discount Engine. See Understanding Awarding Algorithms for more information.

Configuring Discounts contains more information about setting the **Simple Item Exclusivity** and **Simple Transaction Exclusivity** options.

Simple Exclusivity

The following three discount options apply to simple exclusivity in the Discounts module:

Table 16-5 Simple Exclusivity Options

Option	Description
9 - Simple Item Exclusivity	When you select this option, only this discount can be applied to a menu item. This prevents individual items from being discounted more than once. Deselecting this option causes the Exclusivity Group settings to determine how this discount interacts with other discounts. If other discounts that are better deals can apply to the item or transaction, the better deal discounts apply.
23 - Simple Transaction Exclusivity	When you select this option, only this discount can be applied to a single check. This prevents the check from being discounted more than once. Deselecting this option causes the Exclusivity Group settings to determine how this discount interacts with other discounts. If other discounts that are better deals can apply to the item or transaction, the better deal discounts apply.
24 - Discount is Final	When you select this option, no additional discounts can be applied to the transaction after this discount posts. (This option works in automatic discount transactions only.)

Group Exclusivity

Group exclusivity lets you configure the manner in which discounts interact. When two discounts are exclusive to each other, it means that only one discount applies. This exclusiveness can apply either per transaction or per menu item:

- If two discounts are transaction exclusive to each other, only one can be applied to the same transaction. The discount that provides the best deal is applied to the check.
- If two discounts are item exclusive to each other, only one can be applied to a specific menu item. Two discounts that are item exclusive can both be present on a transaction, but only applied to different menu items. Again, the discount that provides the best deal is applied to the item.

Table 16-6 Transaction Exclusivity

Discount	In Exclusivity Group 1	In Exclusivity Group 2
A	Yes	Yes
B	Yes	No
C	No	Yes
D	No	No

Given the configuration shown in the Transaction Exclusivity table, the following occurs:

- Discounts A and B cannot appear on the same transaction because they both belong to the first group.
- Discounts A and C cannot appear on the same transaction because they both belong to the second group.
- Discounts B and C can appear on the same transaction because they do not belong to the same groups.
- Discount D can appear on any transaction with A, B, and C because it does not belong to any group.

The Transaction Exclusivity example shows a configuration with only two groups. The combinations become more complex (yet more flexible) when using all 32 groups in the property.

Table 16-7 Item Exclusivity

Discount	In Exclusivity Group 1	Menu Items Affected by Discount
A	Yes	x, y
B	Yes	x
C	No	y

Given the configuration shown in the Item Exclusivity table, the following occurs:

- Menu Item x is discounted by A or B, but not both. Discounts A and B are exclusive to each other.
- Menu Item y is discounted by A and C. These discounts are not exclusive to each other, so they may both discount the same items.

Menu Item Groups

Each record in a menu item group specifies the menu items it represents. Within the Menu Item Group module, you can assign menu items based on major groups, family groups, or by menu item object number or range. Each menu item group can have a combination of major

groups, family groups, and so on. You can configure menu item groups to include and exclude major groups, family groups, and so on.

Examples of menu item groups are:

- All menu items in major group Liquor
- All menu items in major group Liquor, but not Bottles of Wine in family group 6
- All menu items in family groups Cold Appetizers, Warm Appetizers, and Soups
- All menu items with object numbers in the range 4000-4999, 14000-14999, and major group Non-liquor
- All menu items with object numbers in the range 5000-10000, except those in 6500-6600

Configuring Menu Item Groups

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Menu Item Groups**.
2. Insert a menu item group record, and then double-click it to open.
3. Click **Add** near one of the following areas:
   - Include: You can add the menu item groups to include in the discount here
   - Exclude: You can add the menu item groups to exclude from the discount here
4. Select information for the fields described in the following table:

Table 16-8 Include and Exclude Fields

Field	Description
Type	Select the grouping to include or exclude: • **0 - None** • **1 - All** • **2 - By Major Group** • **3 - By Family Group** • **4 - By Menu Item**
Start #	Click in this field, and then select the start item.
End #	Do not enter anything in this field.
See Items and Select	Click the link and then select the menu items to be the trigger. This item appears in the End # field.
Range	The items you selected in the See Items and Select dialog appear in this field.
Override Price Amount/ Percentage (Include only)	If you want a discount to apply to menu items differently, use this field. For example, you can set discounts for Sweet Potato Fries to 15% and Pub Fries to 20%. To use this field with automatic discounts, you must select the **Use Price in MI Group Detail** option from the Discounts module **Auto** subtab. You can set amount off, percent off, or amount substitution, based on the discount configuration. For example, enter 10.00 to indicate 10% off (not 0.10). The **Use Price in MI Group Detail** option does not function with combination pricing discounts.

5. Click **Save**.

Configuring Discount Privileges

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Voids/Returns** subtab.
3. Select the following options to allow employees to void discounts in a previous round and on closed checks:
   - **27 - Authorize/Perform Void of Discounts from a Previous Round**
   - **70 - Authorize/Perform Void of Discounts on Closed Checks**
4. Click the **Transactions** subtab.
5. Select the options that apply to discounts:
   - **20 - Post Discounts to Checks Belonging to Another Operator**
   - **52 - Authorize/Perform Posting of Discounts in Priv Group 1**
   - **53 - Authorize/Perform Posting of Discounts in Priv Group 2**
   - **54 - Authorize/Perform Posting of Discounts in Priv Group 3**
   - **98 - Authorize/Perform Employee Meal Discount Override for Non-Scheduled Employees**
   - **282 - Authorize/Perform Minimum Amount Threshold Override**
6. Click **Save**.

Configuring Discounts

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Insert a record for a discount or double-click a record to select it.
3. On the **General** tab, select the type of discount from the **Activation Type** drop-down list:
   - **0 - Manual (Manually entered and applied)**
   - **1 - Automatic (Automatically applied, operator cannot enter)**
   - **2 - Coupon (Automatically applied, operator must enter)**
4. (Optional) Enter the minimum menu item subtotal required on a check to apply the discount in the **Min Amount** field.
5. To configure a manual discount, enter the following information. Otherwise, skip this step.
   a. To use a percent discount, enter the percentage in the **Percent** field.
   b. If configuring an open-priced discount, enter the maximum amount allowed for the discount in the **Max Amount** field.
   c. If configuring a preset amount discount, enter the amount of the discount in the **Amount** field.

      This field works with options **7 - Limit Discount to Value in Amount Field** and **8 - If No Amount is Entered, Use the Full Discountable Amount**.
   d. From the **Trigger MI Group** drop-down list, select the menu item group that triggers the discount.

This is an alternative and preferred method to using discount itemizers. The discount applies to only those qualifying menu items based on the selected Trigger MI Group, Trigger Condiment Group, and other discount configurations.

6. To make the discount available to the workstation operator, select **Enabled**.

   You can turn off temporary discounts by deselecting **Enabled**.

7. Select the **Tax Class** to use for the discount.

8. Select a **Privilege Group** to restrict the discount to only employees who are linked to the same privilege group. Set the **Privilege Group** to **0** to allow all employees to use the discount.

9. Select the method to determine how condiment menu items are discounted from the **Condiment Discountability** drop-down list.

   If you select **0 - Use MI Class Option**, the discounts only apply to parent items unless you enable the Menu Item Class option **55 - Discounts Apply to Priced Condiments**.

   If you are configuring an open discount for a delivery service provider, set the **Condiment Discountability** to **4 - Parent and All Condiment Items**.

10. Select the **Report Group** to associate with the discount.

    Report groups are subcategories that allow reports to show similar discounts grouped together. You can set report groups from the Report Groups module, in the Reporting section of the Property tab.

11. Select the **Print Class** to associate with the discount.

    Print Class Output contains more information.

12. Select the appropriate options for the discount. The following table describes the options and indicates the Activation Types (Manual, Automatic, Coupon) that are available for each option.

Table 16-9 Discount Options

Option	Description	Manual	Automatic	Coupon
1 - ON = Open; OFF = Preset	Select this option to make the discount open. The workstation prompts the workstation operator to enter the amount or percentage. If you are configuring an open discount for a delivery service provider, select this option. Deselect this option to use a preset amount or preset percentage for the discount.	Yes	No	Yes
2 - ON = Amount; OFF = Percentage	Select this option to make the discount an amount. Deselect this option to make the discount a percentage.	Yes	No	No

Table 16-9 (Cont.) Discount Options

Option	Description	Manual	Automatic	Coupon
3 - This is an Item Discount	Select this option to calculate the discount based on the price of the last menu item entered. Deselect this option to calculate the discount based on the discountable transaction subtotal. For automatic discounts, this option controls the discount sorting and consolidation on a check. When set, each item in the Menu Item Award Group shows the discounted amount on customer receipts and on the POS client. When deselected, all items in the Menu Item Award Group show a combined discounted amount as one entry.	Yes	Yes	Yes
4 - Employee Meal	Select this option to set the discount as an Employee Discount. The POS client prompts the workstation operator to enter the employee number or ID of the employee receiving the discount.	Yes	No	Yes
5 - Reference Entry Required	Select this option to require the workstation operator to enter a name or number when using the discount.	Yes	No	Yes
6 - Validation Required	Select this option to print a validation chit when the discount is applied.	Yes	No	Yes
7 - Limit Discount to Value in Amount Field	Select this option to limit the amount of a discount. Enter an amount in the **Max Amount** field, which represents the highest discount possible when setting this option.	Yes	No	Yes
8 - If No Amount is Entered, Use the Full Discountable Amount	Select this option to control the open amount discount calculation if the workstation operator does not enter an amount before pressing the Discount button. In short, this option allows you to set a discount as: • A 100% discount (if the workstation operator does not enter an amount before selecting the Discount button) • An open amount discount (if the workstation operator enters an amount before selecting the Discount button) You must select option **2 - ON** = **Amount; OFF** = **Percentage** to activate this option.	Yes	No	No

Table 16-9 (Cont.) Discount Options

Option	Description	Manual	Automatic	Coupon
9 - Simple Item Exclusivity	Select this option to apply the discount to only one menu item. This setting imposes a limit of one discount per item and prevents individual items from receiving a discount more than once. Deselect this option to have the Exclusivity tab settings determine how the discount interacts with other discounts.	Yes	Yes	Yes
10 - Tender Required (Only for Subtotal Discounts)	Select this option to require workstation operators to tender the transaction after applying a subtotal discount. You must also deselect option **3 - This is an Item Discount**.	Yes	No	No
11 - Affects Auto Service Charge (Only Subtotal Discounts)	Select this option to apply the discount to Menu Item Itemizers that allow Auto Service Charges. This results in an adjusted Auto Service Charge value based on the Itemizers discounted. Deselect to keep the Auto Service Charge unchanged.	Yes	No	No
14 - Do Not Allow Subtotal Discount While Seat Filter is Active	Select this option to disallow subtotal discounts while seat filtering is active. Deselect for item discounts or when not using seat handling.	Yes	No	No
23 - Simple Transaction Exclusivity	Select this option to have the discount apply to a single transaction. This setting prevents the transaction from receiving a discount more than once.	Yes	Yes	Yes
24 - Discount is Final	Select this option to prevent workstation operators from applying additional discounts to the transaction after the discount is posted.	No	Yes	No
25 - Discount Combo Meal Group Items	Select this option to discount combo group menu items when the **Allow Discounts** option is set for the combo group.	Yes	Yes	No
28 - Apply to Returned or Direct-Voided Menu Items	Select this option to allow the discount to be applied to returned and voided items.	No	Yes	Yes
29 - Menu item to use check open time	Select this option to have a menu item use the check's open time (instead of using the current time) to determine effectivity of the discount.	Yes	Yes	Yes
30 - Selected menu item to include parent menu item in discount	Select this option to include a parent menu item in the discount when the workstation operator selects a child menu item for the discount.	Yes	Yes	Yes

Table 16-9 (Cont.) Discount Options

Option	Description	Manual	Automatic	Coupon
31 - Net Automatic Service Charge Itemizer	Select this option to post the net value of the menu item to the Automatic Service Charge Itemizer, reducing the Automatic Service Charge after the discount is applied. This option is available when you set option **3 - This is an Item Discount** (above) and option **12 - Add to Automatic Service Charge Itemizer** from the Menu Item Classes module.	No	Yes	Yes
32 - Limit Discount value to value of Discountable Item	Select this option to limit the discountable amount to the item or award when the Amount Off exceeds the item or award. For example, if the Amount Off is $5.00 and the item or award is $4.00, the discount is limited to $4.00.	Yes	Yes	No
33 - Cash Management Transaction Item	Select this option to include the discount in Enterprise Cash Management (ECM) tracking and reports.	Yes	No	Yes

13. Click the **RVC Type** tab.
14. Select the revenue centers that can have the discount available.
15. Click the **Menu Levels** tab.
16. In the **Menu Level Configuration** section, select the **Active On Main Levels** and **Active On Sub Levels** on which the discount is active.
17. In the Main Level Popup and Sub Level Popup sections, select **Transaction Default** to return the transaction to the default Main Level or Sub Level after the discount is pressed, select **0 - Stay Down** to keep the current transaction levels, or select one of the levels 1-8 to become active. Deselect **Transaction Default** to make the other levels active for selection.
18. (Optional) If you are using NLUs or SLUs, click the **NLU/SLU** tab.
19. (Optional) Enter the unique **NLU** number for the discount (0 to 255).
20. (Optional) Select a screen lookup key for the discount from the **SLU** drop-down list.

    The SLU is configured by selecting the Enterprise or property, clicking **Descriptors**, and then clicking **Discounts**.
21. (Optional) From the **MMH SLU** drop-down list, select a Mobile MICROS screen lookup key for the discount.
22. (Optional) From the **Icon** drop-down list, select an icon to assign to the discount key.
23. Click the **Effectivity** tab.
24. Select the dates, days, and times for the discount to be in effect.
25. To configure manual discount printing output, click the **Output** tab, and then select the order devices that will show the discount. Otherwise, skip this step.

    Automatic Discounts and Coupons are excluded from Order Device output.
26. Click the **Effectivity Groups** tab.

Effectivity groups allow you to configure and package promotions so that the menu items and their discounts are only available for a fixed period of time. If effectivity groups do not exist, you must create one or more in the Effectivity Groups module. Configuring Effectivity Groups contains more information.

27. Click the **Add Effectivity Record** link.
28. Click the **Select** link adjacent to **Effectivity Group**, select the effectivity group, and then click **OK** twice. The new effectivity record shows the discount name, Effectivity Status (for example, Active or Future), Date Start, and Date End.
29. Click **Save**.
30. To set an automatic discount to apply to a revenue center:
    a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
    b. Click the **Options** tab.
    c. Select **48 - Enable Automatic Discounts by Default**. If you do not select this option, workstation operators must activate automatic discounts per transaction using one of the following function keys:
       - **655 - Auto Discount Toggle**: Switch the automatic discounts for the transaction
       - **656 - Auto Discount Apply**: Apply all discounts possible
       - **657 - Auto Discount Remove**: Remove all discounts from the transaction

       Examples of the types of discounts that are available with this option include:
       - All appetizers are 25% off
       - All domestic beers are $3.00 during Happy Hour
       - Buy an appetizer, get another one for 50% off
       - Buy an entrée, get $2.00 off a dessert
    d. Click **Save**.
31. To configure an Item Price Substitution Discount, see Configuring an Item Price Substitution Discount.
32. To configure a Quantity Threshold Discount, see Configuring a Quantity Threshold Discount.
33. To configure a Total Price Threshold Discount, see Configuring a Total Price Threshold Discount.
34. To configure a Combination Pricing Discount, see Configuring a Combination Pricing Discount.
35. To configure a Sales Price Discount, see Configuring a Sales Price Discount.

Configuring Effectivity Groups

You can assign discounts, menu item prices, and reservation periods to an effectivity group. Effectivity groups let you configure and package promotions and reservation times. For example, you can make menu items or discounts available for a fixed period of time.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Effectivity Groups**.
2. Insert a record for the effectivity group, enter a descriptive name, and then click **OK**.
3. Double-click the record to open it.

4. Click the **Add** link, and then select the **Start Time** and the **End Time** from the calendar.
5. Click **Save**.
6. After creating the Effectivity Group, you need to associate the Effectivity Group with one of the following types of records to make it active:
   - Tender/Media
   - Menu Item Prices

   > **Note:**
   >
   > When adding (or editing) effectivity group records to menu item price records, a price record's sequence number can only be associated with one effectivity group. Oracle Food and Beverage recommends configuring (and saving) effectivity groups from one price record at a time to avoid errors.

   - Discounts
   - Combo Group Detail Prices
   - Service Charges
   - Taxes
   - Page Content Areas

   You can make the association in the record type. For example, to associate a Tender/Media record with the Effectivity Group, click the **Tender/Media** module, and then click the **Effectivity** tab.

   > **Note:**
   >
   > Valid Property effectivity date settings take precedence over enterprise effectivity date settings. If no valid effectivity dates are configured for a property, then valid enterprise effectivity dates are then used by the system.

Automatic Discounts with Decimal Quantity Menu Items

Simphony ignores decimal quantity menu items with automatic discounts and applies the discount for the closest whole number. For example:

- 1 Cherry Pie = $20.00
- 1.5 Cherry Pies = $30.00
- If you add a menu item to the check with a quantity less than 1, Simphony does not apply the automatic discount.
- If you add a menu item to the check with a discount and then split the check, the discount no longer applies to either check.

The following automatic discount rules ignore decimal quantities when ordering:

- Quantity Threshold
- Combination Pricing

The discount engine ignores menu items added with a quantity less than 1 (for example .5 cup of yogurt). Understanding Automatic Discount Rules contains more information about Quantity Threshold and Combination Pricing.

Amount Off Examples contains examples of the Amount Off award type.

Amount Substitution contains examples of the Amount Substitution award type.

Amount Off Examples

This section provides examples of the Amount Off discount award type.

Example 1: Whole Number Quantity Item

- 1 Salad: $10.00
- Amount Off: $2.00
- Award Percent = Amount Off ($2.00) / Item Base Price ($10.00) = .20
- Discount = Discountable Total ($10.00) x Award Percent (.20) = $2.00

Because the Discountable Total is greater than or equal to the base price, the customer receives the Amount Off.

Example 2: Decimal Number Quantity Item

- .5 Salad: $5.00
- Amount Off: $2.00
- Award Percent = Amount Off ($2.00) / Item Base Price ($10.00) = .20
- Discount = Discountable Total ($5.00) x Award Percent (.20) = $1.00

When the Discountable Total is less than the base price, the customer receives the discount based on the Award Percent calculation.

Example 3: Decimal Number Quantity Item with Condiment

- .5 Salad: $5.00
- 1 Chicken: $5.00
- Discountable Total = $10.00
- Discount = Discountable Total ($10.00) x Award Percent (.20) = $2.00

Because the Discountable Total is greater than or equal to the base price, the customer receives the Amount Off.

Amount Substitution Examples

This section provides examples of the Amount Substitution discount award type.

Example 4: Whole Number Quantity Item

- 1 Salad: $10.00
- Amount Substitution: $9.00 (discounted $1.00)
- Award Percent = Amount Substitution ($9.00) / Item Base Price ($10.00) = .90
- Discount = ($10.00) - Amount Substitution ($9.00) = $1.00

When dealing with whole number quantity menu items, the customer always pays the Amount Substitution. If the customer orders items totaling $100, they pay only $9.00.

Example 5: Decimal Number Quantity Item

- .5 Salad: $5.00
- Amount Substitution: $9.00 (discounted $1.00 from parent item base price)
- Award Percent = Amount Substitution ($9.00) / Item Base Price ($10.00) = .90
- Discount = (Current Sales Total – (Current Sales x Award Percent) = $5.00 – ($5.00 x .90) = $5.00 – $4.50 = $.50

Example 6: Decimal Number Quantity Item, More Condiments Than Parent Items

- The Award Percent for Amount Substitution is based on the parent item base price, not the total price of each item plus condiments.
- The Discount Calculation only applies when the menu item plus condiments are less than the base price amount of the parent item.

Order Number	Items	Price	Award Percent	Discount Calculation	Discount Amount	Customer Pays
1	1 Salad 1 Chicken 1 Steak 1 Steak (This extra condiment is added to the first menu item.)	$10.00 $5.00 $5.00 $5.00	($9.00) / ($10.00) = .90	($25.00 – $9.00)	$16.00	$9.00
2	1 Salad 1 Chicken 1 Steak	$10.00 $5.00 $5.00	($9.00) / ($10.00) = .90	($25.00 – $9.00)	$11.00	$9.00
3	1 Salad 1 Chicken 1 Steak	$10.00 $2.50 $5.00	($9.00) / ($10.00) = .90	($17.50 – $9.00)	$8.50	$9.00
4	.5 Salad 1 Steak	$5.00 $5.00	($9.00) / ($10.00) = .90	($10.00 – $9.00)	$1.00	$9.00

Configuring Decimal Quantity Menu Items

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click the menu item class record to open it.
3. (Optional) On the **General** tab, select **2 - Decimal/fraction allowed, round sales count up** from the **Count Entry** drop-down list.
4. Click **Save**.

Configuring an Item Price Substitution Discount

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Double-click an automatic discount record to open it.
3. On the **Auto** tab, select **1 - Item Price Substitution** from the **Automatic (Automatically applied, operator cannot enter)** drop-down list.
4. (Optional) Enter a **Priority** for the discount.

   Priority determines the order in which discounts are calculated. By default, this field is blank (0) for all discounts, meaning that discounts are calculated at the same time. If you enter a priority, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority zero (0) discounts are calculated last. The priority field allows Simphony to calculate discounts more efficiently.
5. In the Trigger section, configure a trigger to invoke the discount:
   - **Trigger MI Group**: Select the menu item groups that will trigger the discount award.
   - **Trigger Condiment Group**: Select the condiment menu item groups to use as the trigger for the discount, if any. For example, If customers can get a bagel for $0.50 when they add cream cheese to any bagel, cream cheese is the trigger condiment and bagel is the trigger menu item for the $0.50 discount.
   - **Minimum Quantity**: Enter the number of items that customers must order from the corresponding trigger menu group before applying the discount award.
6. In the Awards section, configure the discount amount:
   - **Percentage Off**: If this is a percent discount, enter the percentage to discount from each item in the Trigger MI Group.
   - **Amount Off**: If this is an amount discount, enter the amount to discount from each item in the Trigger MI Group.
   - **Amount Substitution**: If this is an amount substitution discount, enter the price to charge for each item in the Trigger MI Group.
   - **Max Count**: Enter the maximum number of discounts that can be applied to a single check when option **23 - Simple Transaction Exclusivity** is enabled for this discount. If set to zero (0), the maximum count is unlimited.

     For example, if the discount is $5.00 off every appetizer with a limit of 3 appetizers per check, set this field to 3. Then, if seven appetizers are ordered, the three most expensive appetizers are discounted while the other four appetizers are charged the regular price.
7. If you configured a Percent Off discount, click the **General** tab, and then enter the maximum amount allowed for the discount in the **Max Amount** field.
8. Click **Save**.

Configuring a Quantity Threshold Discount

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Double-click an automatic discount record to open it.
3. Click the **Auto** tab, and then select **2 - Quantity Threshold** from the **Automatic (Automatically applied, operator cannot enter)** drop-down list.

4. Select the appropriate **Awarding Algorithm**:
   - **1 - Best Deal for Customer**: Select to apply the best possible deal (highest discount amount) to the check. Oracle recommends using this setting unless specific business needs are required at the property.
   - **2 - Best Deal for Merchant**: Select to apply the smallest discount amount to the check. This option is intended for properties with specific needs and configurations.
5. (Optional) Enter a **Priority** for the discount.

   Priority determines the order in which discounts are calculated. By default, this field is blank (0) for all discounts, meaning that discounts are calculated at the same time. If you enter a priority, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority zero (0) discounts are calculated last. The priority field allows Simphony to calculate discounts more efficiently.
6. Enter the maximum number of times the coupon discount can be entered on a check in the **Max Count Per Check** field.
7. To use promotion prices that appear in the Menu Item Groups module for the discounted menu item, select **Use Price in MI Group Detail**.
8. In the Trigger section, configure up to eight unique triggers to invoke the discount. You must configure the triggers in sequential order.
   - **Trigger MI Group**: Select the menu item groups that will trigger the discount award.
   - **Trigger Condiment Group**: Select the condiment menu item groups to use as the trigger for the discount, if any. For example, If customers can get a bagel for $0.50 when they add cream cheese to any bagel, cream cheese is the trigger condiment and bagel is the trigger menu item for the $0.50 discount.
   - **Quantity**: Enter the number of items that customers must order from the corresponding trigger menu group before applying the discount award.
   - **Minimum Quantity**: Enter the number of items that customers must order from the corresponding trigger menu group before applying the discount award.
9. In the Awards section, configure up to eight rewards for the discount:
   - **Award MI Group**: Select the menu item groups to use as the award group when the minimum quantity of items from the Trigger MI Group is ordered.
   - **Award Type**: Select the discount type.
   - **Percentage Off**: If this is a percent discount, enter the percentage to discount from each item in the Award MI Group.
   - **Amount Off**: If this is an amount discount, enter the amount to discount from each item in the Award MI Group.
   - **Amount Substitution**: If this is an amount substitution discount, enter the price to charge for each item in the Award MI Group.
   - **Award Count**: Enter the number of award items that are allowed once the Trigger MI Group's Minimum quantity is reached. For example, if this is a Buy Three Coffees and Get Two Donuts at 50% off discount, set this field to 2.
   - **Max Count**: Enter the maximum number of award items that can be discounted on a single check. If set to zero (0), the maximum count is unlimited.
   - **Allow award of higher priced item**: Select to allow a discount to be applied when the trigger item price is lower than the award item price.
10. If you configured a Percent Off discount, click the **General** tab, and then enter the maximum amount allowed for the discount in the **Max Amount** field.

11. Click **Save**.

Configuring a Total Price Threshold Discount

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Double-click an automatic discount record to open it.
3. Click the **Auto** tab, and then select **3 - Total Price Threshold** from the **Automatic (Automatically applied, operator cannot enter)** drop-down list.
4. (Optional) Enter a **Priority** for the discount.

   Priority determines the order in which discounts are calculated. By default, this field is blank (0) for all discounts, meaning that discounts are calculated at the same time. If you enter a priority, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority zero (0) discounts are calculated last. The priority field allows Simphony to calculate discounts more efficiently.
5. To use promotion prices that appear in the Menu Item Groups module for the discounted menu item, select **Use Price in MI Group Detail**.
6. In the Trigger section, configure up to eight unique triggers to invoke the discount. You must configure the triggers in sequential order.
   - **Trigger MI Group**: Select the menu item groups that will trigger the discount award. When the total amount of all items on a check exceeds the amount configured for the trigger group, the discount will be applied to all items in the Award Menu Item Group.
   - **Trigger Condiment Group**: Select the condiment menu item groups to use as the trigger for the discount, if any. For example, If customers can get a bagel for $0.50 when they add cream cheese to any bagel, cream cheese is the trigger condiment and bagel is the trigger menu item for the $0.50 discount.
   - **Total**: Enter the total amount of corresponding trigger menu item group items customers must order before applying the discount (that is, to activate the Award Menu Item Group). For example, if you are giving 15% off all shirts for a purchase of $80 or more, enter 80.00 in this field.
7. In the Awards section, configure up to eight rewards for the discount:
   - **Award MI Group**: Select the menu item groups to use as the award group when the total amount of all items on a check exceeds the Total configured for the Trigger MI Group.
   - **Award Type**: Select the discount type.
   - **Percentage Off**: If this is a percent discount, enter the percentage to discount from each item in the Award MI Group.
   - **Amount Off**: If this is an amount discount, enter the amount to discount from each item in the Award MI Group.
   - **Amount Substitution**: If this is an amount substitution discount, enter the price to charge for each item in the Award MI Group.
   - **Max Count**: Enter the maximum number of award items that can be discounted on a single check. If set to zero (0), the maximum count is unlimited.
8. If you configured a Percent Off discount, click the **General** tab, and then enter the maximum amount allowed for the discount in the **Max Amount** field.
9. Click **Save**.

Configuring a Combination Pricing Discount

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Double-click an automatic discount record to open it.
3. On the **Auto** tab, select **4 - Combination Pricing** from the **Automatic (Automatically applied, operator cannot enter)** drop-down list.
4. (Optional) Enter a **Priority** for the discount.

   Priority determines the order in which discounts are calculated. By default, this field is blank (0) for all discounts, meaning that discounts are calculated at the same time. If you enter a priority, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority zero (0) discounts are calculated last. The priority field allows Simphony to calculate discounts more efficiently.
5. If you are configuring an automatic coupon discount with combination pricing, enter the maximum number of times the coupon discount can be entered on a check in the **Max Count Per Check** field. Enter a value of `0` to allow the discount to be added an unlimited amount of times to the same check.

   This field is active only for automatic discounts with the **Activation Type** of **2 - Coupon (Automatically applied, operator must enter)**.
6. In the Trigger section, select up to eight unique **Trigger MI Groups** that invoke the discount. You must configure the triggers in sequential order.
7. Enter the price to charge for this combo meal in the **Amount Substitution** field.
8. Enter the maximum number of combo meals that customers can order per check in the **Max Count** field.

   In general, the **Max Count** field is set to **0** to allow an unlimited amount of combo meals on a single check
9. Click **Save**.

Configuring a Sales Price Discount

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Double-click an automatic discount record to open it.
3. On the **Auto** tab, select **5- Sales Price** from the **Automatic (Automatically applied, operator cannot enter)** drop-down list.
4. Select the menu item groups that will trigger the discount from the **Trigger MI Group** drop-down list, and then select the condiment menu item groups to use as the trigger for the discount, if any from the **Trigger Condiment Group** drop-down list.

   For example, if customers can get a bagel for $0.50 when they add cream cheese to any bagel, cream cheese is the trigger condiment and bagel is the trigger menu item for the $0.50 discount.
5. Select discount type, and then enter the discount amount:
   - **Percentage Off**: If this is a percent discount, enter the percentage to discount from each item in the menu group.
   - **Amount Off**: If this is an amount discount, enter the amount to discount from each item in the menu group.

- **Amount Substitution**: If this is an amount substitution discount, enter the price to charge for each item in the menu group.

6. If you configured a Percent Off discount, click the **General** tab, and then enter the maximum amount allowed for the discount in the **Max Amount** field.
7. Click **Save**.

Discounts With Condiments

You can apply manual, automatic, and coupon discounts to a check when a condiment item is present on the check. A workstation operator can manually apply a discount by selecting the condiment item. For example, configure a bagel to be a parent menu item and configure the condiment, such as cream cheese, to trigger a 5% discount. As a result, when the workstation operator enters the customer order for a bagel with cream cheese, the system applies the discount after the workstation operator selects cream cheese.

Place condiments in trigger menu item groups to have Simphony apply automatic and coupon discounts.

Complete the following tasks to apply discounts when condiments are present:

- Specify the condiment to be the trigger
- Set the discount to apply to the parent menu item, condiment, or both
- Set up the discount for a condiment
- Create a discount button to appear on the workstation page

Configuring Condiments as Discount Triggers

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Menu Item Groups**.
2. Create a menu item group record and then double-click it to open.
3. Click **Add** near the Include area.
4. Select information for the fields described in the following table:

Table 16-10 Include Fields

Field	Description
Type	Select **4 - By Menu Item**.
Start #	Click in this field, and select the start number.
End #	Click in this field, but do not enter a value.
See Items and Select	Click the link and then select the condiment to act as the discount trigger. This condiment appears in the End # field.

5. Click **Save**.

Configuring Discounts for Parent Menu Items in a Menu Item Class

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a menu item class record.
3. Click the **Options** tab.
4. To allow both parent and condiment items to receive the discount, select **55 - Discounts Apply to Priced Condiments (parent items only)**. Deselect option **55** to have only the parent item receive the discount.
5. Click **Save**.

Configuring a Condiment as the Discount Award

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Create the discount record and then double-click it.
3. On the **General** tab, enter the fields as described in the following table:

Table 16-11 Discount Fields

Field	Description
Activation Type	Select the type of discount: • **0 - Manual (Manually entered and applied)** • **1 - Automatic (Automatically applied, operator cannot enter)** • **2 - Coupon (Automatically applied, operator must enter)**
Percent	Enter the discount percentage to use a percent discount.
Max Amount	Enter the maximum amount allowed for the discount to use an amount discount.
Enabled	Select this option to make the discount available to the workstation operator. (If you configure a temporary discount, you can quickly turn it off.)
Condiment Discountability	Select the discount method for condiment menu items: • **0 - Use MI Class Option**: You must also select Menu Item Class option **55 - Discounts Apply to Priced Condiments (parent items only)**. • **1 - Parent Items Only**: Selecting this option applies the discount only to the parent menu item. • **2 - Condiment Items Only**: Selecting this option applies the discount to the trigger condiment and to all condiments associated with the check. • **3 - Parent and Highlighted Condiment Items**: This option is available only for manual discounts. • **4 - Parent and All Condiment Items**: Selecting this option applies the discount to the parent menu item and to all condiments associated with the check.

Table 16-11 (Cont.) Discount Fields

Field	Description
Trigger MI Group	Select the menu item group to trigger the discount award. When a workstation operator adds the minimum quantity of items from this menu item group, the items are discounted based on the award configuration for this discount. When you select **0 - Use Discount Itemizers**, the only options available for the Trigger Condiment Group are **0 - None** and all available condiment groups previously created.
Trigger Condiment Group	Select the Condiment Menu Item Group to use as the trigger for the discount. This field is dimmed when the Trigger MI Group is set to **0 - Use Discount Itemizers**. This is an alternative method to using discount itemizers. The discount applies to only qualifying menu items based on the selected **Trigger Menu Item Group**, **Trigger Condiment Group**, and other discount configuration.
Options	Select **25 - Discount Combo Meal Group Items** to discount combo group menu items. You must also select option **1 - Allow Discounts** from the Combo Meal Groups module.

4. On the **Effectivity** tab, select the days on which the application applies the discount.
5. On the **RVC Type** tab, select the revenue centers that can use this discount.
6. On the **Menu Levels** tab, in the **Menu Level Configuration** section, select all options for **Active On Main Levels** and **Active On Sub Levels**.
7. On the **Output** tab, select the following options:
   - **Print on Customer Receipt**
   - **Print on Journal**
   - **Print on Guest Check**
8. Click **Save**.

Creating the Discount Button

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the discount button.
3. Click the **Edit** tab, and then select the page area in which to define the button.
4. Click **Button**, and then on the General subtab, select **Discount** from the **Type** drop-down list.
5. Click the black arrow directly beneath the **Type** drop-down list, select the discount, and then click **OK**.
6. Enter a **Legend** for the button, position and size the button on the page, and then click **Save**.

17

Service Charges

A service charge is the amount added to a sales transaction for a service rendered and 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

You can configure the following types of service charges:

- Service changes that report as Tips on employee tip reports
- Service changes that report as Service Charges on employee tip reports
- Service changes that are paid to the House
- Non-revenue service charges
- Gift certificates sold

Configuring Service Charges

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
2. Insert the service charge record, and then double-click it.
3. On the **General** tab, enter information in the General Settings section as described in the following table:

Table 17-1 General Settings Fields

Field	Description
Percent	Enter the service charge percentage. This field becomes available only when you deselect option **2 - ON** = **Amount; OFF** = **Percentage**.
Amount	Enter the service charge amount. This field becomes available only when you select option **2 - ON** = **Amount; OFF** = **Percentage**.
Tips Paid Tender/Media	To link the service charge to a Tips Paid Tender/Media, select the **Pickup** configured as **Tips Paid** from the drop-down list. When a service charge linked to a Tips Paid Tender/Media is added to a check, it automatically posts to Tips Paid. Automatically posted Tips Paid occur as a part of a sales transaction and therefore are not included in non-sales transaction reports.

Table 17-1 (Cont.) General Settings Fields

Field	Description
Pickup Tender/Media	To link a pickup tender to the service charge, select the Tender/Media from the drop-down list. Only the tenders that have **3 - Pickup** set in the **Key Type** field of the Tender/Media module appear.
HALO	Enter the High Amount Lock Out (HALO) value for the service charge. This setting limits the amount workstation operators can enter for the service charge. To exceed this limit, the workstation operator must have the **Authorize/Perform Over HALO Amounts on Service Charge Keys** option set for the employee role. When you set the value to **0**, there is no HALO for the service charge. This field does not apply to automatic service charges.
Print Class	Select the Print Class for the service charge. Print Class Output contains more information.
Tax Class	To apply a tax class to the service charge, select a **Tax Class** from the drop-down list.
Privilege Group	Select a **Privilege Group** to restrict use of this service charge to employees who are linked to the same privilege group. You can set the field to **0** to allow all employees to use the service charge.
Percent to Tips Paid	Enter the percentage of a charged tip that posts to the Tips Paid Tender/Media.
Report Group	Select the report group to which this service charge record belongs. Report groups are subcategories that allow reports to show similar service charges grouped and subtotaled together. You can configure report groups from the Report Groups module, in the Reporting section of the Property tab.

4. Select the Service Charge options as described in the following table:

Table 17-2 Service Charge Options

Option	Description
1 - ON = Open; OFF = Preset	Select this option to make the service charge an open service charge, prompting the workstation operator for the amount or percentage. Deselect this option to use a preset amount or preset percentage for the service charge.
2 - ON = Amount; OFF = Percentage	Select this option to make the service charge an amount service charge. Deselect this option to make the service charge a percentage service charge.

Table 17-2 (Cont.) Service Charge Options

Option	Description
3 - Post to Charged Tips Total on Tip Reports	Select this option to post the service charge to the Direct Charged Tips total. This option records charged tips that employees receive directly from customers. If you select this option, workstation operators who use it must also enter a charge payment using a tender with Tender/ Media option **Post to Charged Receipts on Tip Reports** set. Select either **3 - Post to Charged Tips Total** on Tip Reports or **11 - Do Not Post to Gross Receipts**, but not both. Select either **3 - Post to Charged Tips Total** on Tip Reports or **4 - Post to Service Charges Total on Tip Reports**, but not both. Configuring a Tender with Charged Tips contains more information about charged tips.
4 - Post to Service Charges Total on Tip Reports	Select this option to post the service charge to the Service Charges total, but not the Total Tips or the Gross F&B Receipts total. Deselect this option to post the service charge to the Gross Food and Beverage Receipts, but not to the Service Charges total. The Service Charges total on tip reports meets the reporting requirements of United States IRS Form 8027, which states that this total should equal all tips that are paid to the employee as wages, and are less than 10% of the transaction total. Select either **3 - Post to Charged Tips Total** on Tip Reports or **4 - Post to Service Charges Total on Tip Reports**, but not both.
5 - Reference Entry Required	Select this option to require the workstation operator to enter an alphanumeric reference entry when using the service charge.
6 - Validation Required	Select this option to print a validation chit when the workstation operator uses the service charge.
7 - Non-Revenue Service Charge (No Post to Sales)	Select this option to create a service charge that does not post to Simphony sales totals (for example, cash back through the SPI). (A tracking group total can track this amount if necessary.) This option is used to create a service charge for gift card/certificate sales as the customer can pay for the gift certificate with a credit card. If you are using gift cards through the SPI, you need to create non-revenue service charges for: • Activate Gift Card • Issue Gift Card • Reload Gift Card You must also enable options **1** and **28**. When you select this option, you must configure the service charge as an amount service charge. A non-revenue service charge cannot post to a check that contains menu items. If a cashier link is required for tendering, a cashier link is also required for posting a non-revenue service charge. When using this option, deselect options **3** and **4**.

Table 17-2 (Cont.) Service Charge Options

Option	Description
8 - Taiwanese Paid Out	Select this option to create a service charge that is used to record the repayment of cash from a Taiwanese paid out.
9 - Reset Itemizer(s)	Select this option to reset service charge itemizers. When set, service charges can only apply once to menu items that post to the same service charge itemizers. Deselecting this option allows multiple service charges to apply to the same service charge itemizers.
10 - Service Charge Adds to Guest Count	Select this option to increment the transaction's guest count by one every time the service charge applies to the transaction. This option is often used for non-revenue service charges that apply as cover charges. Selecting the RVC Parameter option **8 - Use Number of Seats for Guest Count** overrides the setting of this option. When the workstation operator presses the **Number of Guests** key during a transaction, the guest count no longer increments when the service charge applies to the transaction. The workstation operator must maintain the guest count manually from that point.
11 - Do Not Post to Gross Receipts	Select this option to prevent checks with this service charge from posting to gross F&B receipts on tip reports. This is intended for service charges that meet the United States Internal Revenue Service's definition of non-allocable receipts (as defined in the IRS Instructions for Form 8027). Deselecting this option allows the service charge to post to gross F&B receipts on the tip reports. Select either **3 - Post to Charged Tips Total** on Tip Reports or **11 - Do Not Post to Gross Receipts**, but not both.
12 - Item is Shareable	Select this option to share the item between two or more seats or two or more checks when using TouchEdit or TouchSplit.
13 - Cash Tips	Select this option to add the Direct Cash Tips total on the tip reports. Selecting option **3 - Post to Charged Tips Total on Tip Reports** or **4 - Post to Service Charges Total on Tip Reports** overrides this option. This option is used in a cashier environment where the guest leaves the table and pays the check directly with a cashier. When paying the bill, the guest indicates to the cashier to give the change to the server. After receiving payment, the cashier can post a value to a Cash Tip Service Charge. This Cash Tip Service Charge posts to the employee's Direct Cash Tips total on the Employee Tip Report.
14 - Service Charge Used For Stored Value Transactions	Select this option if the service charge is used for stored value transactions.

Table 17-2 (Cont.) Service Charge Options

Option	Description
17 - Use Floor Amount (Automatic Service Charges Only)	Select this option to require a minimum value for the automatic service charge. Then enter the minimum floor amount in the Amount field, which is only active for percentage service charges when you select option **17**. This option only applies to the service charge in revenue centers where it is used as an automatic service charge. If a check is transferred between revenue centers (where one revenue center has an automatic service charge configured and the other revenue center does not have a service charge), the automatic service charge drops from the check. An automatic service charge is not a static value; the system recalculates this value with every round based on revenue center specific configuration. If the check moves to another revenue center, the automatic service charge is no longer applied to it. If the destination revenue center has an automatic service charge configured, that is a different service charge which applies to items originating in that revenue center. It does not apply to menu items from other revenue centers.
18 - Gift Certificate Sold	Select this option to create a service charge that can be paid without posting to sales totals. (A tracking group total can track the amount if necessary.) This option is similar to 7 **- Non-Revenue Service Charge**, except that menu items can be present on the check in addition to the service charge. When you select this option, you must configure the service charge as an amount. If a tender requires a cashier link, posting a non-revenue service charge also requires a cashier link. Selecting this option dims option 7.
22 - Add to Checks Begun/Paid Count if Non-Revenue	This option applies to the service charge if it is configured as non-revenue (option 7 is set). Selecting this option increases the checks begun or paid count on reports when the non-revenue service charge applies to a transaction. Deselecting this option results in no change to the checks begun or paid count.
23 - Rental Deposit	Select this option to use the service charge as a rental deposit. Rental deposits work with the deposit handling feature and are necessary to apply a deposit to a check. Service charges with this option set may be non-revenue service charges. However, unlike traditional non-revenue service charges, a check may contain more than one rental deposit service charge.
26 - Configure as Banquet Tip	Select this option to include the amount of the service charge transaction in the Tip Summary Total of the banquet check.
27 - Configure as Banquet Fee	Select this option to include the amount of the service charge transaction in the Fees Summary Total based upon the selected service charge on the banquet check.
28 - Cash Management Transaction Item	Select this option to include the service charge in Cash Management tracking and reporting.

Table 17-2 (Cont.) Service Charge Options

Option	Description
30 - Prorate Service Charges to Menu Items	Select this option to prorate the service charge based on the value of the menu items. This overrides the requirement for the minimum guest count for a memo check, if the minimum guest count requirement is met for the entire check.

5. Click **Save**.

Creating Service Charge Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page (typically the Transaction page) on which to place the **Service Charge** buttons.
3. On the **Edit** tab, select the page area in which to define the **Service Charge** buttons.
4. Click **Button** to add a button, and then on the General subtab, select **Service Charge** from the **Type** drop-down list.
5. Click the black arrow directly beneath the **Type** drop-down list, select the service charge, and then click **OK**.
6. Enter a **Legend** for the button.
7. Position and size the button on the page. Use the Style arrow to change the color.
8. Click **Save**.

Menu Item Fees

You can apply one or more menu item service charge fees (for example, a bottle deposit and a recycling fee), which are combined as a service charge group, to a menu item. When the workstation operator adds a menu item (for example, bottled soda) that is associated with a service charge group, Simphony adds the menu item fees to the guest check under the service charge group. Auditors can track the revenue from specific menu item fees, such as a recycling fee.

Configuring Menu Item Fees

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Service Charge Groups**.
2. Insert a new service charge group or double-click the existing service charge group record.
3. Add or remove service charges to be included with this service charge group using the **Add** and **Delete** links.
4. Click **Save**.
5. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
6. Double-click the menu item class record.

7. On the **General** tab, select the **Service Charge Group** from the drop-down list to apply to the menu item class record.
8. Click **Save**.
9. Select the Enterprise level, click **Configuration**, and then click **Roles**.
10. Select the role, click the **Operations** tab, and then click the **Voids/Returns** subtab.
11. Select **Authorize/Perform Void of Fees**.
12. Click **Save**.
13. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
14. Add the **Display/Hide Menu Item Fees** function key.

    Workstation operators use the **Display/Hide Menu Item Fees** function key to show or hide menu item fees on the workstation.
15. Click **Save**.

18
Menu Items

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.

Oracle recommends configuring menu items in the following order:

Figure 18-1 Sequence for Configuring Menu Items



Configuring Menu Items

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a menu item class.
3. To allow the main level of the transaction to change to another level when a workstation operator orders a menu item from this class, select a new **Main Level Popup**.
4. To allow the sub level of the transaction to change to another level when a workstation operator orders a menu item from this class, select a new **Sub Level Popup**.
5. To allow the transaction to return to the default main level after a workstation operator orders a menu item from this class, select **Main Level Default**.
6. To allow the transaction to return to the default sub level after a workstation operator orders a menu item from this class, select **Sub Level Default**.
7. Click the **Options** tab, and then select the appropriate options:

Table 18-1 Menu Item Options

Option	Description
10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing	Select this option for an item with multiple price definitions, to have the workstation use sub level pricing for the menu item class.
26 - Keep Main Level With Repeat Rounds	Select this option to have the items in the class use the same main menu level that was in effect during the most recent service round when ordered using the **Repeat Round** touchscreen button.
27 - Keep Sub Level With Repeat Rounds	Select this option to have the items in the class use the same sub menu level that was in effect during the most recent service round when ordered using the **Repeat Round** touchscreen button.
28 - Print Main Level Prefix and Suffix	Select this option to show the main menu level prefixes or suffixes on the check detail area and print on guest checks and order receipts.
29 - Print Sub Level Prefix and Suffix	Select this option to show the sub menu level prefixes or suffixes on the check detail area and print on guest checks and customer receipts. Prefixes and suffixes are often used to show the size of a menu item (for example, small or large soda). It is recommended to enable this option so customers understand why different charges are applied to the same menu item. For example, a Large Soda is $2.50, and a Small Soda is $1.50. When this option is deselected, the guest check or order receipt shows two entries for Soda: one Soda for $2.50 and another Soda for $1.50. If prefixes are printing, the customer understands that the Lrg Soda is $2.50 and the Sm Soda is $1.50.
52 - Prompt to begin another item if this item is incomplete	Select this option to prompt workstation operators to move to the next item before completing a menu item order. To use option **52**, you must deselect option **51 - Item must be complete before beginning another item**. Option **52** is not used with required condiments.
69 - Prompt to lookup menu item definition based on current menu levels (Repeat Rounds)	Select this option to prompt workstation operators to run a menu item definition lookup based on the current active menu levels when a repeatable menu item is unavailable. You must also select options **26 - Keep Main Level With Repeat Rounds** and **27 - Keep Sub Level With Repeat Rounds**.

8. Click **Save**.

Adding and Disabling Menu Items

Adding a menu item is a different process than adding records in other EMC modules. You can add master records, definition records, and price records at the same time for the Enterprise from the Menu Item Maintenance module. These instructions explain how to add menu item master records with definition and price records. For information about adding masters, definitions, and prices individually, see the appropriate section:

- Configuring Master Records for Menu Items
- Configuring Menu Item Definitions
- Configuring Menu Item Prices

1. To add menu items from the EMC, select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Insert a record.
3. If you opened Menu Item Maintenance at the revenue center level, from the **Select a task to perform** drop-down list, select **Add Master Record from Template**.
4. Click **Select** adjacent to the **Master to Copy** field, and then select a template record.
5. Enter the **Name** of the new menu item.
6. Enter the **Record Number** of the item. By default, this field shows the next available record number after the selected record to copy.
7. If you selected **Add Master Record from Template**, select **Copy Menu Item Names** to copy all existing primary and foreign names, including Long Descriptors, from the original menu item to the new menu item.
8. If the menu item is priced the same for the entire Enterprise or property, select **Use the same price for all records**, and then enter the price in the text box next to the option.
9. If the menu item has more than one definition and price, select **Configure Prices Individually**, enter the price for the first definition in the **Price** column, and then click **OK** to add the menu item.
10. To add another menu item, click **Yes** when prompted, and repeat Steps 4 through 9.
11. When you have finished adding items, click **No**.
12. Click **Save**.
13. To disable a menu item, select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
14. Double-click the menu item to disable.
15. Click the **General** tab, and then deselect all main and sub levels from the Menu Level Availability section.
16. Click **Save**.

Adding Non-Revenue Menu Items

Non-revenue menu items on guest checks do not add to the net sales total amounts on financial reports. A typical use case for non-revenue menu items is to use them to enter the value of a gift card reload amount. Workstation operators can add the item to a check and then tender the transaction, causing the item's value to be added to a gift card. This value does not increment the system’s revenue because no physical product has been sold.

The following restrictions are enforced on checks, including non-revenue menu items on the point-of-sales (POS) system (and including Transaction Services Gen1):

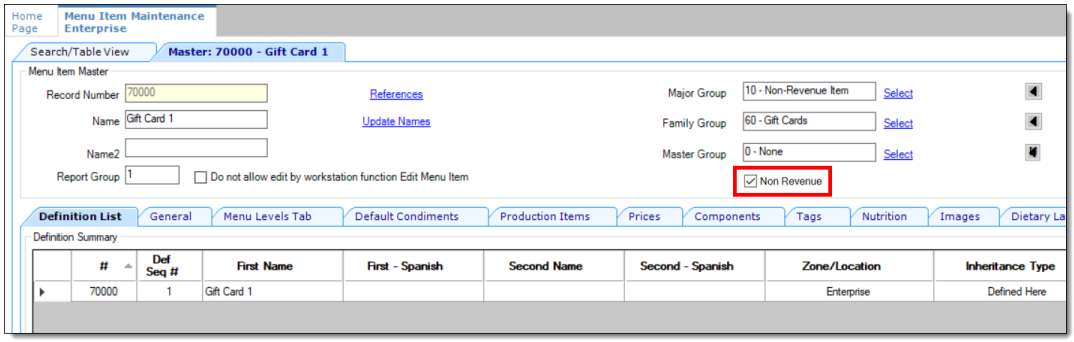
- Taxes and discounts are not applied to non-revenue menu items (even if they are configured in the EMC).
- Non-revenue menu items cannot be included as a part of combo meals. If a combo meal is added containing non-revenue menu items, the POS generates an error message.
- Non-revenue menu items can only be configured as condiments for non-revenue parent menu items. Non-revenue menu items cannot be configured as condiments (or combo meal sides) for conventional priced parent menu items, and vice versa. Incorrect configurations generate an error message.
- For all workstation financial reports, the previously existing line **Non Rev Svc** has been changed to **Non Rev Total**. Non-revenue menu items sales are now posted on the **Non Rev Total** line on reports.

> **Note:**
>
> The existing **Menu Item Sales** and **Menu Item Summary** reports do not post non-revenue menu item sales totals. Two workstation reports track such totals:
>
> – Non Revenue Menu Item Sales
>
> – Non Revenue Menu Item Summary

Configuring Non-Revenue Menu Items

1. Select the Enterprise, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click **Insert** on the toolbar.
3. Add a master record using your preferred configuration method. See Configuring Master Records for Menu Items for more information.
4. For each non-revenue menu item master record, enable the **Non-Revenue** checkbox, and then click **Save**.

Figure 18-2 Menu Item Maintenance - Master Records



See List of Workstation PMC Reports for more information about the non-revenue menu item reports.

Configuring Employee Privileges to Edit Menu Item Definitions and Prices

In the EMC, you must grant employees permission to edit menu item definitions and prices. The permissions enable workstation operators to change menu item definitions and prices at the property level from the workstation using the Edit Menu Item function key. The *Oracle Hospitality Simphony Manager User Guide* contains more information on Adjusting Menu Item Definitions.

Users cannot edit a menu item that is defined at the Enterprise or zone levels; users with the appropriate privileges can edit a menu item that is defined at the property level.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **PMC Procedures** sub-tab.
3. Select options **30020 - View Menu Items** to enable employees to access menu items from the workstation, **30021 - Edit Menu Item Definitions** to enable employees to edit menu item definitions from the workstation, and **30022 - Edit Menu Item Prices** to enable employees to edit menu item prices from the workstation.
4. Click the **PMC General/Reports** sub-tab.
5. Select **30001 - Run PMC** to allow employees associated with the role to launch the PMC on the workstation using Function Key 300, Launch PMC.
6. Click **Save**.

Configuring Employee Privileges for Menu Item Availability Adjustments

In the EMC, you must grant employees permission to adjust the availability of menu items. The permission enables workstation operators to change menu item availability at the workstation using the Menu Item Availability function key. The *Oracle Hospitality Simphony Manager User Guide* contains more information on Adjusting Menu Item Availability.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **PMC Procedures** sub-tab.
3. Select options **30020 - View Menu Items** to enable employees to access menu items from the workstation, and **30023 - Change Menu Item Availability** to enable employees associated with the role to adjust the availability of menu items from the workstation.
4. Click the **PMC General/Reports** sub-tab.
5. Select **30001 - Run PMC** to allow employees associated with the role to launch the PMC on the workstation using Function Key 300, Launch PMC.
6. Click **Save**.

Configuring Menu Item Availability for Multiple Definitions at the Workstation

By default, the **Menu Item Availability** function key only allows workstation operators to adjust the availability of the first menu item definition. To allow workstation operators to edit all definitions of an item from the workstation:

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab, and then select **66 - Manage Menu Item Availability/Out of Item for each Menu Item Definition**.
3. Click **Save**.

Adding the Menu Item Availability Key to the Transaction Page

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page (typically the Transaction page) on which to place the menu item availability function key.
3. On the **Edit** tab, select the page area in which to define the menu item availability function key.
4. Click **Button**.
5. On the **General** subtab, enter the key name in the **Legend** field.
6. From the **Type** drop-down list, select **Function**.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select **Menu Item** in the Filter list, select **Menu Item Availability** in the Results list, and then click **OK**.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Adding Menu Item Keys to the Transaction Page

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page (typically the Transaction page) on which to place the menu item buttons.
3. On the **Edit** tab, select the page area in which to define the menu item buttons.
4. Click **Button** to add a button.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. From the **Type** drop-down list, select **Menu Item**.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select the menu item, and then click **OK**.
9. From the **Menu Item Display Name** drop-down list, select the appearance for the menu item name.

10. Position and size the button on the page. Use the Style arrow to change the color.
11. Click **Save**.
12. Repeat Steps 4 through 11 to create keys for each menu item.

Adding the Edit Menu Item Key to the Transaction Page

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page (typically the Transaction page) on which to place the menu item buttons.
3. On the **Edit** tab, select the page area in which to define the menu item buttons.
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. From the **Type** drop-down list, select **Menu Item**.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select **Menu Item** in the Filter list, select **Edit Menu Item** in the Results list, and then click **OK**.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Repeatable Menu Items

Repeat Round allows workstation operators to order several items (typically beverages or fixed price meal items) from the previous round of a guest check to the current round using a single button. Repeat Round is used when customers re-order the same menu items for another round. For example, a group of 10 people at the bar ordered 10 beverages. After drinking the beverages, they ordered another round. Rather than entering all 10 drinks again, the bartender presses the **Repeat Round** function key to quickly re-enter the beverage order.

If a menu item is set to check for availability, the Repeat Round function inquires and updates this status. If the availability of an item is exceeded, the entire Repeat Round process stops.

The following menu item types are not repeatable:

- Weighed menu items
- Combo meals
- Voided and returned menu items
- Menu items that are programmed to allow a decimal amount entry

Configuring Menu Items to be Repeatable

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a menu item class record to open it.
3. Click the **Options** tab, and then configure the following settings: .
    - **25 - Use with Repeat Round Key**: Select if menu items in this class can be reposted on guest checks using the Repeat Round key. For an item to be repeatable, you must

make all associated condiments repeatable. Else, the parent menu item does not repeat when the Repeat Round key is used.

- **26 - Keep Main Level With Repeat Rounds**: Select for items in this class to use the same Main Menu Level that was in effect during the most recent service round when ordered using the Repeat Round key. Deselect to use current menu levels. For example, you can use a Main Level with Happy Hour prices, where Happy Hour ends at 7:00 pm. In this example, if you keep the Main Level, you will have an Extended Happy Hour.
- **27 - Keep Sub Level with Repeat Round**: Select for items in this class to use the same Sub Menu Level that was in effect during the most recent service round when ordered using the Repeat Round key. Deselect to use current menu levels. You can use a Sub Level for menu item sizing. If a pitcher of draft beer is ordered and service totaled, the Repeat Round key repeats the pitcher if this option is selected, but repeats only a pint of draft beer if deselected.
- **69 - Prompt to lookup menu item definition based on current menu levels (Repeat Rounds)**: Select to prompt the workstation operator to look up a menu item definition based on the current menu levels when a repeatable menu item is unavailable. You must also select options **26 - Keep Main Level With Repeat Rounds** and **27 - Keep Sub Level With Repeat Rounds**.

4. Click **Save**.

Configuring a Repeat Round Button

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Repeat Round button.
3. Click the **Edit** tab, and then select the page area in which to define the button.
4. Click **Button**, and then on the **General** subtab, select **Function** from the **Type** drop-down list.
5. Click the black arrow directly beneath the **Type** drop-down list, select **Transaction** from the **Type** pane, and then select **Repeat Round**.
6. Enter a **Legend** for the button (for example, `Repeat Round`), position and size the button on the page, and then click **Save**.

Menu Item Distribution

Menu Item Distribution is the method of distributing menu item records in the Menu Item Maintenance module. Because the Menu Item Maintenance module allows the configuration of multiple record types (Menu Item Masters, Menu Item Definitions, and Menu Item Prices), the Menu Item Distribution dialog differs from the dialogs that appear in other modules.

Distributing Menu Items

1. Select the Enterprise, property, revenue center, or zone, click the **Configuration** tab, and then click **Menu Item Maintenance**.
2. To distribute a specific set of records, use the filters to search for the items to distribute, and then select the records.
3. Click **Edit** on the EMC toolbar, and then select **Distribute**.

4. From the Destination pane, select the locations to which to distribute.
5. From the Record Type pane, select the attributes to distribute:
   - **Masters**: Select to distribute menu item masters.
   - **Definitions**: Select to distribute menu item definitions.
   - **Prices**: Select to distribute menu item prices.
6. From the Record Selection pane, select the records to distribute:
   - **All Records**: Select to copy all records from the source to the destination revenue center or property.
   - **Selected Records**: Select to distribute only the selected records. When distributing definitions and prices, all records for the object number are distributed. For example, if you choose to distribute definition number 1000, sequence #3, all definitions for number 1000 are distributed, not only sequence #3.
   - **Specify Records**: Select to enter a list or range of records to distribute, and then enter the record numbers in the text box below.
7. From the Options pane, select the appropriate options:
   - **Overwrite records if they exist**: Select to overwrite existing records in the destination location. If the destination record is inherited, it is not overwritten.
   - **Create records if they do not exist**: Select to create new records in the destination location.
   - **Distribute inherited records**: Select to distribute all records (defined and inherited) to the destination property. Deselect to distribute only records defined at the source property.
   - **If destination record is inherited, create override**: Select to override inherited definition records in the destination property. Deselect to keep inherited records unchanged.
   - **Distribute Data Extensions if they exist**: Select to distribute data extension values, if existing. The source and destination data extension property records must match. Deselect to prevent data extension values from distributing
   - **Create Masters for Definitions**: Select to create new Menu Item Master records for distributed Menu Item Definition records in the destination location, if they do not currently exist. This option is only available when Definitions are being distributed without Master records. It is recommended to select this option if distributing menu items between revenue centers in different properties.
8. Click **OK**.

   Once distribution completes, a Distribution Report appears showing all records that were created, overwritten, and any errors encountered. You can save this report by clicking **Save to Disk**.

Searching and Filtering Menu Items

The Menu Item Maintenance module allows you to search for menu items. Typically several thousand menu item records are likely to exist. Searching and filtering allows you to work with only the desired menu item records. By default, no items appear in table view.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. To view all records, click **Search** without entering search criteria.

Depending on the number of menu items, this step may take several minutes.

3. To view specific menu item records, enter information in the relevant search fields, and then click **Search**:

   - **Record Type**: Select the type of record to find (**Menu Item Master**, **Menu Item Definition**, or **Menu Item Price**). When both a **Menu Item Master** and a revenue center are selected, Simphony returns only master records with definitions in the selected revenue center.
   - **Name Search**: Enter the menu item name (partial or full) to search. Only records containing the text in the name field for the specified language are returned. Menu Item Definition and Price searches will look for the text in either the Name 1 or Name 2 fields. Entering Shrimp Cocktail returns the specific record; a family group search on Appetizers returns results more quickly.
   - **Major Group**: Enter a major group number or a range of major group numbers to include in the search.
   - **Family Group**: Enter a family group number or a range of family group numbers to include in the search.
   - **Master Group**: Enter a menu item master group number or a range of master group numbers to include in the search.
   - **Object Number or Range**: Enter an object number or range of object numbers to include in the search.
   - **Show Master w/Defs Only**: Select to show only menu item master records that contain one or more definitions for this zone or property. Deselect to show all menu item master records for this level or above.
   - **Map Menu Item Overrides**: Select to show the Menu Item Override indicator, which allows you to see other locations in the Enterprise where the item is configured. Deselect to exclude the Menu Item Override indicator. As the system needs to check the entire enterprise for the menu item, the search results will take longer to generate. Therefore, set this option only when there is a specific need to see this information.
   - **Class**: Enter a menu item class or range of menu item classes to include in the search when querying menu item definitions or menu item prices.
   - **SLU**: Enter a SLU or range of SLUs to include in the search when querying menu item definitions or menu item prices.
   - **Sales Itemizer**: Enter a sales itemizer or range of sales itemizers to include in the search when querying menu item definitions or menu item prices.

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Categorizing Menu Items into Groups

Both major groups and family groups categorize menu items and sales. Every menu item belongs to a major group and to a family group.

A major group is a basic category of a menu item, such as Food or Liquor. For example, you can configure major groups to represent revenue centers so that an accountant can see sales figures for a tenant.

A family group is a category of menu items.

Configuring Major Groups

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Major Groups**.
2. Insert a new record, and then enter a name for the major group (for example, Food).
3. Enter a number other than 0 (zero) in the **Report Group** field.

   For example, you can enter 1 for the Food major group and enter 2 for the Liquor major group. When you enter 0 (zero), the menu item does not appear on the Menu Item Report.
4. Click **Save**.

Configuring Family Groups

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Family Groups**.
2. Insert a new record, and then enter a name for the family group (for example, Appetizers).
3. Enter a number other than 0 (zero) in the **Report Group** field.

   For example, you can enter 1 for all family groups associated with Food and enter 2 for all family groups associated with Liquor. When you enter 0 (zero), the menu item does not appear on the Menu Item Report.
4. (Optional) Select the **Parent Major Group** to which the new family group belongs.

   > **Note:**
   >
   > Assigning a Parent Major Group to a Family Group provides a filtering of choices when assigning a family group to a Menu Item Master record, where only the family groups belonging to the assigned Major Group appear in the drop-down list. This is useful when there are a large number of family groups configured, or to prevent assigning a family group which is not associated with a major group.
5. Click **Save**.

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Menu Item Master Records

A menu item master record is configured at the Enterprise level and is inherited by all properties. This record resides at the top of the menu item hierarchy, and its primary purpose is to appear in reports. A menu item master:

- Does not appear on workstation touchscreens
- Does not have a price

A menu item can have only one menu item master per property (for example, one Shrimp Cocktail master record exists).

Configuring Master Records for Menu Items

You can add master records for menu items, along with menu item definitions and prices, using a template record. If you are creating a new property and there are no template records to use, at first you can add only a menu item master record, and then add menu item definition and price records later.

If a menu item name includes the special characters, $#$, they are replaced with the object number of the record being created. For example, if the name is My Record $#$ and is being inserted into object number 4, the new record is created as My Record 4.

1. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click **Insert** on the toolbar.
3. To add a master record using a template:
    a. From the **Select a task to perform** drop-down list, select **Add Master Record from Template**, and then select the menu item to use as the template from **Master to Copy**.
    b. Enter the **Name** of the new menu item, select the **Report Master**, and then enter the **Record Number** for the menu item master record.
    c. To copy all menu item names from the original menu item template, select **Copy Menu Item Name**.
    d. To modify the prices of each menu item definition, select **Configure Prices Individually**, and then enter the price for each definition in the table.

       This is the default setting. This option is used for menu items that do not use the same price in every revenue center. That is, multiple price records exist in a single revenue center for a single definition. If the **Price Level** field in the table is blank, the record has no price (it is probably a condiment), and no price will be created.
    e. To define a single price for all menu item definitions, select **Use same price for all records**, and then enter the price in the adjacent field.

       This option is used for menu items that are priced the same system-wide. It creates a menu item with the same price for every definition and price record. If the Price Level field in the table is blank, the record has no price (it is probably a condiment), and no price will be created. You can modify the price of a definition at any time.
4. To add a master record without a template:

a. From the **Select a task to perform** drop-down list, select **Add Master Record Without a Template**, and then enter the **Name** of the new menu item.

b. Select a **Major Group** and a **Family Group** for the menu item.

c. Enter a **Report Group** number between 1 and 99 for the menu item.

   Menu Item Reports sort and list subtotals by **Report Group**. When the **Report Group** number is 0 (zero), the menu item does not show on Menu Item Reports.

d. Select the appropriate value for the object number:

   - To insert the menu item in the next available position, select **Next Available Position**.
   - To define the record number or range for the new menu item record or records, select **Record Number Or Range**, and then enter the record numbers or ranges.
   - To insert the menu item at the next available record number after the currently selected record, select **After currently selected record**. For example, if you have record #50 selected and records 51 through 53 also exist, the new men item is created in record #54.

5. Click **OK**.
6. (Optional) Select the **Master Group** for the Menu Item Master record.

   A Menu Item Master Group is a collection of Menu Item Masters. The group is used for conversational ordering to allow the menu item master to be switched based on levels or other conditions.

7. Double-click the new master record to open it.
8. Click the **Production Item** tab, click **Add** and then, configure the following settings:

   - **Production Item Name**: Select the name of the production item. You can add more than one distinct production item.
   - **Production Item Count**: Enter the number of portions required to complete the menu item. The count must be between 1000.00 and 0.00. For example, a hamburger would require a single hamburger patty, while a double-cheeseburger would required 2 patties. You can enter half, quarter, and so on.

9. Click **Save**.

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Menu Item Search and Report

To prevent the addition of unnecessary menu item records, privileged users can run the Module Reference Report to search and review the system for existing menu item names or record numbers (or range of record numbers). This report shows the location of items and overrides throughout the Enterprise. The report appears in two views: tree view and text view.

Generating the Module Reference Report

1. Select the Enterprise level, click the **Tasks** tab, and then click **Module Reference Report**.
2. Select the appropriate **Report Type**:
   - **By Name**: Select to search for menu items by name.
   - **By Number**: Select to search for menu items by record number.
3. Click **Select Items for Report**, select the menu item names or numbers to include in the search, and then click **OK**.

   Select multiple menu items by pressing the CTRL or SHIFT key while selecting an item. You can select a maximum of 50 items at a time.
4. Click **Run Report by Name** or **Run Report by Number** to generate the report.
5. To print the report, click the **Text View** tab, and then click **Print**.
6. To save the report as a text file, click the **Text View** tab, click **Save as Text File**, and then enter the file name and browse to the location to save the file.

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Menu Item Classes

A menu item class consists of a set of options that apply to similar menu items in a revenue center. A menu item class specifies information, including:

- The tax class associated with the menu items
- The two types of menu items: Regular and Condiments
- Active menu levels after ordering an item from the class
- The order devices to which the items output

You can configure similar menu items into a class rather than individually setting each menu item's order device output or condiment settings. For example, the menu items Cola, Diet Cola, and Root Beer all share the following characteristics:

- Receive the same tax rates
- Do not require condiments
- Output to the same order device

Therefore, you can create one menu item class called Soda and make all soda menu items a part of this class.

Configuring Menu Item Classes

For information about configuring menu item classes for condiments and fixed price meals, see Creating Menu Item Classes for Condiment Groups.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Insert a new record, and then enter a name for the new menu item class.
3. Double-click the new menu item class.
4. On the **General** tab, configure the appropriate settings:

Table 22-1 General Menu Item Class Fields

Field	Description
Tax Class	Select the tax class to apply to the menu item class. To leave the tax class blank, select **0 - None**. Tax Rates and Tax Classes contains more information about tax classes.
Main Level Popup	Select the Main Level of the transaction that becomes active after ordering a menu item from the menu item class.
Sub Level Popup	Select the Sub Level of the transaction that becomes active after ordering a menu item from the menu item class.

Table 22-1 (Cont.) General Menu Item Class Fields

Field	Description
Privilege Group	Select a Privilege Group number to restrict the use of menu items in the menu item class to employees who are linked to the same Privilege Group. To enable all employees to order items in the menu item class, select **0** (zero).
Sales Itemizer	Select the Sales Itemizer that is associated with this Menu Item Class. The Sales Itemizer is often used for interface (Property Management System) purposes, or to replace the Subtotal on printed guest checks and customer receipts. You can either see the Subtotal, or Food, Liquor, Beer, and Wine.
Discount Itemizer	Select the discount itemizer to determine which discounts can apply to specific menu items.
Srv Chrg Itemizer	Select the Service Charge Itemizer that is associated with this Menu item Class. The Service Charge Itemizer is used to determine which Service Charges can be applied to specific menu items. Note that the automatic service charge is unaffected by this setting; only Menu Item Class Option **12 - Add to Automatic Service Charge Itemizer** affects the Automatic Service Charge posting.
HALO	Enter the High Amount Lock Out (HALO) value for menu items in this Menu Item Class. This field represents the total dollar amount of the items that are being ordered, and it is often used for Open Priced menu items. For example, if this field is set to 50, the operator is prompted to confirm items in this class if they exceed 50.00. Note that the entered value must contain all zeroes except for the first digit. Valid values are: 2, 20, 200, 2000. Invalid values are 45, 450, 405. HALO is also often used for preset priced menu items to safeguard against erroneous entry. For example, the price of Coffee is $1.00. A workstation operator could post 1 Coffee, 5 Coffees or 10 Coffees if someone is getting coffee for their entire office. It is unlikely that someone would order 100 Coffees ($100). It is likely that someone ordering 10 Coffees inadvertently presses an extra 0 when entering the quantity.
KDS/Dining Course	Select the course to which items in this Menu Item Class belong. You must also select Menu Item Class option 45 - Use KDS/Dining Course Number.

Table 22-1 (Cont.) General Menu Item Class Fields

Field	Description
Default Master Group	Select the default parent item for a condiment during conversational ordering. This field should only be set for condiments; it is meaningless for parent items.
Condiment Order Type	Select the method for adding a condiment to a check.
Condiment Order Popup	Select the Popup Condiment Orderer page to automatically pop up when adding a menu item with required condiments.
Condiment Edit Popup	Select the Condiment Orderer page to automatically pop up when selecting a menu item with required condiments in the check detail
Pricing Calculation	Select the calculation method to use for pricing menu items in the class. • To base the price on the amount entered, select **0 - Based on entered count** • To base the price on the rounded up count, select **1 - Based on sales count when sales rounded up**.
Count Display	Select the manner in which the amount appears for a decimal item on the workstation and printers. • **0 - Show entered amount** • **1 - Show sales count amount with entered count as reference** The count for an item can be entered as a decimal. There are two counts kept for an item; the entered amount, and the sales count. The sales count is always the entered amount if the entered amount is a whole number. If the entered amount is not a whole number then the sales count is the entered amount, only rounded up. For example, if a user enters 1.5, then the entered amount is 1.5 and the sales count is 2. This field determines whether the entered amount or the sales count appears on workstations and printers.
Count Entry	Select the manner in which workstation operators can enter the sales count of an item in the class.
Print Group	Enter the Print Group (1-99). The sorting mechanism uses this value for receipt printing, check detail, and order output devices. When the items are set to use groups for sorting, the items appear from lowest group number to highest.

Table 22-1 (Cont.) General Menu Item Class Fields

Field	Description
Print Class	Select the print class for the menu item class. If the Condiment Prefix Type is set to anything except **0 - Not a Prefix**, prefix condiments follow the same print class setting chosen for the condiment with which they are associated.
KDS Highlight Scheme	Select the KDS Highlight Scheme color to display menu items on the KDS.
Condiment Prefix Type	Select the prefix type associated with the condiment type.
Condiment Handling with Parent Item Switching	Select from the following condiment behaviors to use for default and other Condiments, when the parent item is switched in Conversational Ordering: • **0 - Condiments Remain Unchanged**: Condiment modifications will be unchanged. • **1 - Reset Default Condiments Only**: Only default condiments for a menu item reset. • **2 - Reset All Condiments**: All condiment types reset. All options are applicable when Condiment Prefixes are used.
Next Page/Panel	Select a Page or Panel that the order screen switches to after a menu item associated with this class is ordered. • **Page**: From the drop-down list, select the next screen to which the workstation user is directed. • **Panel**: If you select a tabbed template, this area specifies which tab to navigate to after pressing the button. To use the Next Page functionality in the Menu Item Classes module, Oracle recommends that you configure a Sales SLU screen in the Page Design module, and then select this newly created SLU page from the Page drop-down list and **Save**. Ensure that menu items are assigned the proper SLU from the Menu Item Definition record; this allows workstation operators to add the menu item from the SLU page. To enable a hard-coded menu item key to navigate to another page, configure the Next Page/Panel fields for the actual menu item key in the Page Design module.
Maximum Refill Count	Enter the maximum number of refills allowed (up to 99).
Refill Descriptor	Enter the optional label to identify refill items when printed on order chits (up to 12 characters).

Table 22-1 (Cont.) General Menu Item Class Fields

Field	Description
Service Charge Group	Select the Service Charge Group to apply to this Menu Item Class. Select **0 - None** for no service charge.
Pre-Production Chit Print Class	Select a Print Class to print pre-production chits to remote printers for the menu items assigned to this Menu Item Class. Remote pre-production chit printers are assigned in the Print Classes module. See *Configuring Pre-Production Chits to Output to Remote Printers* for more setup information.
Allergen Class	Select the Allergen Class for the Menu Item Class.

5. Click the **Options** tab, and then select the appropriate options.

Table 22-2 Menu Item Class Options

Option	Description
1 - On = Open-Priced Menu Items; Off = Preset Menu Items	Select this option to require workstation operators to enter a price when adding a menu item in the class. Deselect this option if you are using preset prices.
2 - On = Condiment Menu Items; Off = Regular Menu Items	Select to designate menu items as condiments. Deselect for regular and parent menu items.
3 - Negative Priced Menu Items	Select this option to have menu items in this class post a negative price. This option causes a minus sign (-) to appear before the price.
4 - Increment Seat Number With Sale of these Menu Items	Select this option to increase the seat number each time a workstation operator adds a menu item in the class. This feature is not available when seat filtering is active.
5 - Reference Entry Required	Select this option to require workstation operators to enter a reference entry when adding menu items in the class. The text that is entered outputs to order devices, checks, receipts, and journals.
6 - Validation Required	Select this option to print a validation chit at the validation printer designated in the Workstation module.
7 - Item Discounts May Be Applied to these Menu Items	Select this option to allow menu items in the class to be discounted with an item discount (manual discount only).

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
8 - Allow Menu Items in this Class to be Non-Priced	Select this option to allow menu items in the class to be non-priced. When selected, priced menu items in this class post a sales and count total when ordered, and appear on reports; non-priced items do not post a sales count and do not appear on reports. Priced menu items do not require an entry on the Menu Item Price form.
9 - Condiment Changes Print Group of Parent Menu item	Select to force a parent menu item that is modified by a condiment, to use the Print Group assigned to the condiment.
10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing	Select this option to apply Sub Level pricing to menu items assigned to the menu item class.
11 - Add to Guest Count	Select this option to increase the guest count each time a workstation operator adds menu items that are assigned to the class. When this option is selected and the Guest Count field is set to 0, Simphony increments the guest count in the transaction by one. If a workstation operator uses the **Number of Guests** function key during a transaction, the guest count no longer increments when menu items in the class are added to the check. Revenue Center Parameters option **8 - Use Number of Seats for Guest Count** overrides this option.
12 - Add to Automatic Service Charge Itemizer	Select this option to add sales of the menu items in this class to the Automatic Service Charge itemizer. Automatic service charges apply to all menu items associated with Menu Item Classes where this option is enabled.
13 - Print Price on Order Chit	Select this option to print the menu item price on order devices. This option is typically used with open-priced menu items. Order Devices option **Wrap Condiments** overrides this option.
14 - Do Not Put in Transaction Detail	Select this option to prevent zero-priced or non-priced menu items in the class from printing, appearing, or posting.
15 - Weighed Items	Select if all menu items in this class are sold by weight.
17 - Print Name 1 and Name 2 on Checks	Select this option to print the First Name and the Second Name (from the Menu Item's Definition record) of all menu items associated with the class on guest checks. For example, with wine menu items, the First Name shows the name of the wine, while the Second Name shows the Bin Number and the type of wine.

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
18 - Print Name 2 on Order Output instead of Name 1	Select this option to print the Second Name, if defined, of menu items associated with this class on order devices. If a Second Name is not defined, the First Name is used. Order Devices option **11 - Print Both Menu Item Names** overrides this option.
19 - Use Name 2 on Touchscreens instead of Name 1	Select this option to show the Second Name, if defined, of menu items in this class on touchscreen keys. If a Second Name is not defined, the First Name is used. This applies to names shown on Menu Item and Condiment SLU's, but not to Direct Access keys.
21 - Require Number of Condiments to Match Number of Parent Items	Select to require the number of required condiments to match the number of parent menu items ordered.
22 - On = Use Own Output Link; Off = Use Parent's (Condiments Only)	Select to have condiments in this class print to their own order devices. Deselect to have condiments print to the same order devices as the parent menu item, provided that the menu item class has the same order devices configured.
23 - Add Condiment Price to the Parent Item's Price on Check Only	Select to add condiment prices to the parent menu item's price on guest checks.
24 - LDS Items (International LDS Only)	Select this option if all menu items in this class can be ordered using an International Liquor Dispensing System (ILDS). Deselect if using a North American Dispensing System (NALDS).
25 - Use with Repeat Round Key	Select if all menu items in this class can be reposted on guest checks using the Repeat Round key.
26 - Keep Main Level With Repeat Rounds	Select to enforce items in this class to use the same Main Menu Level that was in effect during the most recent service round when ordered using the Repeat Round key. Deselect to use current menu levels.
27 - Keep Sub Level with Repeat Round	Select to enforce items in this class to use the same Sub Menu Level that was in effect during the most recent service round when ordered using the Repeat Round key. Deselect to use current menu levels.
28 - Print Main Level Prefix and Suffix	Select to have the Main level prefix or suffix show on the check detail area and to print on order output devices, guest checks, and customer receipts.
29 - Print Sub Level Prefix and Suffix	Select to have the Sub level prefix or suffix show on the check detail area and to print on order output devices, guest checks, and customer receipts.

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
30 - Sort Condiments by Print Group	Select to sort condiment display and printing tasks according to their Print Group assignment.
31 - Prompt for Seat Number with Each Menu Item	Select to prompt Enter Seat Number after adding each parent item with this Menu Item Class. Deselect to suppress the seat number prompt. You can disable seat numbers for a revenue center and use a condiment group programmed with menu items named Seat 1, Seat 2.
34 - Item is Beverage	Select if all items in this Menu Item Class are beverages. Use this option with Beverage Control to track beverage usage, or with Suites Management to determine if an item is considered food or beverage.
35 - Fixed Price Meal	Select this option to indicate all menu items in the class are the priced (parent) portion of a fixed price meal.
38 - Item is Shareable	Select this option to allow menu items in the class to be shared between two or more seats, or two or more checks.
39 - Retail Item	Select this option to designate all menu items in this class as retail items. Retail items do not post to Gross Food and Beverage receipts.
41 - Consolidate Menu Items with Condiments on Order Output	Select this option to consolidate parent menu items on Order Device Output, and then to print each condiment with its seat number to which the condiment applies. (The Order Device option, **Print Seat Numbers with Individual Items** must be enabled). For example, if this option is enabled, and an operator orders Chicken Wings with condiments 'Extra' and 'Sauce' on Seat 1, and Chicken Wings with condiments 'Without' and 'Bleu Cheese' on Seat 2, then the Order Device Output shows the following: Seat 1,2: Chicken Wings S1 Extra S1 Sauce S2 Without S2 Bleu Cheese
42 - Consolidate Parents with Matching Condiments on Order Output	Select to consolidate parent menu items with identical (matching) condiments.
43 - Include in CRM/TMS Check Detail Status Update	Select this option to indicate whether a menu item associated with this class is sent to TMS with the check detail status message
45 - Use KDS/Dining Course Number	Select this option to use KDS/Dining Coursing with the menu item class.
46 - Override KDS Course Number of Parent Class	Select to allow a parent menu item modified by a condiment in this Menu Item Class to use the KDS Course of the condiment.

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
49 - Participates in Menu Item Master Switching	Select to switch a parent menu item based a menu level change. All items switching based on menu levels must belong to the same Master Group, and each item's Menu Item Class has this option set. The menu item must be set as a Condiment Prefix.
50 - Anonymous Menu Item	Select to allow placeholder or anonymous menu items, which can be replaced with the actual parent menu items during the ordering process.
51 - Item must be complete before beginning another item	Select to prevent operators from adding a second menu item before completing the first item. Not used with required condiment
52 - Prompt to begin another item if this item is incomplete	Select to prompt to move to the next item before completing a menu item order.
53 - Remove Item on Subsequent Press if Ordering Type is Exclusive	Select to remove a condiment item and revert the parent menu item to the default state. The menu item must be set as a Condiment Prefix.
54 - Condiment entry/display relational to Parent Item’s quantity	Select to show the number of condiments for each parent menu item. Deselect to add each condiment individually or by quantity without relation to the parent item's quantity.
55 - Discounts Apply to Priced Condiments (parent items only)	Select to apply discounts to parent items in this class and all priced condiments associated with the items. Deselect to apply discounts only to parent items. The menu item must be a Condiment Prefix.
57 - Parent items appear on condiment order devices (for condiments only)	Select to send the parent item to the order devices programmed for this class. Deselect to send parent menu items based on the Menu Item Class settings only. The menu item must be set as a Condiment Prefix.
58 - Condiment order device programming overrides that of parent	Select to allow the order devices programmed for this condiments class to override the order devices defined for the parent items. The menu item must not be a Condiment Prefix.
59 - Allow Item Incomplete Based On Role	Select to allow the employee to add the parent menu item without the required condiments. You must also set Allow Incomplete Item in the Roles module for the employee.
60 - Placeholder	Select for menu items that serve as a placeholder during Combo Meal ordering.
61 - No Placeholder Display	Select to hide placeholder items from the check detail area.

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
62 - Count Menu Item	Select this option to allow the menu item count to appear on the KDS or at the bottom of the requisition chit from a local or remote printer. To use the Count menu item feature with a KDS, assign a KDS Chit Layout Style containing a menu item count element (for example, #301 - Chit-Std-DOM). You must also select the Order Devices KDS option **11 - Display Menu Item Count** for the order device. To be counted, you must send a menu item to at least one KDS Display. This feature informs the expediter or bagger of how many items go into the bag for carry-out or quick service orders.
63 - Autofill	Select to adjust the quantity to satisfy the required condiments when adding the condiment with a required condiment group that has Min/Max set, and more than one condiment is still needed.
64 - Rental Deposit	Select to make all items in this class Rental Deposits.
65 - Support Enhanced Prefix Mode (Parent Only)	Select this option to use enhanced prefix support for non-condiment menu items in the Menu Item Class. Enhanced prefix support uses condiment prefix items to describe condiments such as “Extra” or “No”. Existing condiment threshold levels are supported for condiment prefixes. See Assigning Condiments to Parent Menu Item Classes and Using Condiment Prefixes with Menu Item Classes for more information.
66 - Print Name 3 on Order Output instead of Name 1	Select this option to print the menu item definition’s Third Name, if defined, on order devices for all menu items in this class. If a Third Name is not defined, the First Name is used. Menu Item Classes option **18 - Print Name 2 on Order Output instead of Name 1** and Order Devices option **11 - Print Both Menu Item Names** overrides this option.
67 - Use Name 3 on Touchscreens instead of Name 1	Select to show the third name (if defined) on system generated touchscreen keys. Override this option by selecting Use Name 2 on Touchscreens instead of Name 1 in the Menu Item Class module.
68 - Print Name 3 on Checks	Select this option to print the menu item definition’s Third Name, if defined, on guest checks for menu items in this class. **17 - Print Name 1 and Name 2 on Checks** overrides this option.

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
69 - Prompt to lookup menu item definition based on current menu levels (Repeat Rounds)	Select to prompt the operator to look up a menu item definition based on the current menu levels when a repeatable menu item is unavailable. You must also select options **26 - Keep Main Level With Repeat Rounds** and **27 - Keep Sub Level With Repeat Rounds**.
70 - Use Name 2 on OCB instead of Name 1	Select this option to show the menu item definition's Second Name, if defined, on an Order Confirmation Board (OCB). If a Second Name is not defined, the First Name is used.
71 - Use Name 3 on OCB instead of Name 1	Select to show the third name (if defined) on an Order Confirmation Board (OCB). If no third name is defined, the first name is used. Override this option by selecting Use Name 2 on OCB instead of Name 1 in the Menu Item Class module.
72 - Enable Refill	Select for customers to pay once for selected menu items, while receiving multiple servings or refills.
74 - Prevent Menu Items from Being Held	Select this option to prevent menu items belonging to this menu item class from being held.
75 - KDS Sort Priority Above Normal	See Prioritizing Menu Item Classes on KDS Displays in the *Oracle MICROS Simphony KDS Configuration and User Guide* for more information.
76 - Post Sales Count To KDS Reports	Select this option to add the menu item count to the Menu Item Count totals on KDS reports.
77 - Only allow condiments with an active price record	Select this option to have condiment items with an active effectivity price record appear in SLUs. When the effectivity record is expired or has a future date, the condiments are not available in SLUs. You must also disable option **8 - Allow Menu Items in this Class to be Non-Priced**.
78 - Forgive Inclusive Tax	Select this option to forgive the inclusive tax for the Menu Item Class.

Table 22-2 (Cont.) Menu Item Class Options

Option	Description
79 - Do not print unpriced condiments on Guest Checks	Select this option to prevent unpriced condiments from printing on guest checks and customer receipts. Option **79** applies to the menu item condiments. For example, if there is no charge for lettuce on a sandwich, you can configure this condiment to not print. If there is a charge for avocado on a sandwich, you can configure this condiment to print. You must also select **65 - Support Enhanced Prefix Mode (Parent Only)** for the main menu item (such as a hamburger or chicken sandwich) that can be modified with condiments. Using Condiment Prefixes with Menu Item Classes contains more information about option **65**.
82 - Contains Alcohol	Select this option to identify menu items containing alcohol. This setting can then be used by integrators (via Simphony Transaction Services Gen2) to show users which menu items contain alcohol.
83 - Ignore KDS Prep Time (Capacity)	Select for menu items in this class to be displayed at a KDS display as soon capacity is available, ignoring having all menu items prep complete at the same time.
84 - Override Parent's Ignore KDS Prep Time option	Overrides option **83** of the parent class.

6. Click **Save**.

Print Groups

Print groups are user-defined values used to sort menu items. Print groups control sorting on various types of print jobs including order chits, guest checks, and customer receipts. However, it is most commonly used for order device output. You can use print groups to:

- Sort by preparation time (items that take longer are sorted first)
- Sort by meal course (appetizers before entrees)
- Sort specific condiments last
- Change the print group of parent menu items

Print groups are configured for a menu item class; new menu item class records are created with a default value of 1.

Configuring Print Groups for Menu Item Classes

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a menu item class to open it.
3. On the General tab, select a **Print Group** for the class.

When the items are set to use print groups for sorting, the items appear from lowest group number to highest.

4. Click **Save**.

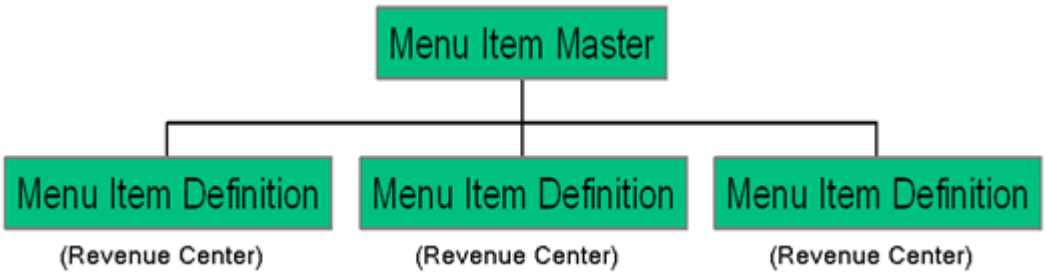
23

Menu Item Definitions

Menu item definitions define the menu items available within the revenue center, including:

- Screen look up (SLU) on which the menu item appears
- Menu item class to which it belongs
- Menu levels where the item is active
- Name of the item that appears on guest checks, customer receipts, order receipts, and journals

Menu item definitions are the records that customers can order. Menu item definitions appear on touchscreens and print on order chits, guest checks, and customer receipts. A menu item can have up to 64 menu item definitions in a revenue center for a single menu item master. The following figure shows the relationship between the menu item master and menu item definitions.



When customers order menu items (configured as menu item definitions), the sale count of the menu item master increases. This is the purpose of the menu item master record. Only one instance of the item needs to exist in a property, but multiple menu item definitions allow this master record to behave differently.

You can create new definitions based on an existing menu item or without using an item. You can add menu item definitions to existing menu item master records from both table and form view.

Adding Menu Item Definition Records to Multiple Menu Item Masters

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click **Insert**.
3. From the **Select a task to perform** drop-down list, select **Add Definition to Masters**.

   The drop-down list shows valid choices based on your location within the application and your privilege levels.

4. To add definitions to a menu item master record, select the menu item master record from the master record list.
5. To add definitions to multiple menu item master records, select one of the following from the **Range Type** drop-down list:
    a. **Record Number or Range**: Select this option if the menu item master records to receive the definitions are not in sequential order, and then enter individual record numbers or ranges (for example, 3, 5, 6-12).
    b. **Select Range**: Select this option if the menu item master records to receive the definitions are in sequential order, and then select the begin and end items.
6. Select one of the following methods to create the new definitions:
    - **Use Template**: Select this option to use an existing definition record as a template for creating the new definitions, and then select the menu item definition record to use as the template from the **Template Definition** field.
    - **Menu Item Class**: Select the menu item class, and then click **OK** to create new definitions from scratch (without a template).
7. Select the definitions to create for the master records from the **Definitions to Add** list.

    Up to 64 definitions can exist for one master record in one zone. Simphony ignores requests to create a definition sequence for a master, if it already exists.
8. If you are using a template and you want the new definitions to inherit price records, from the **Insert Price Records** drop-down list, select **Inherit Prices from Template**.
9. To add new price records for the new menu item definitions:
    a. From the **Insert Price Records** drop-down list, select **Specify Prices**.
    b. Select the **Number of Price Records** to create for the definitions.
    c. Enter the **Price** for the definitions.

    Typically, you use **Specify Prices** when the new definitions each have only one price record.
10. Click **OK** to confirm.
11. Configure the definitions. See Configuring Menu Item Definitions for instructions.

Adding Menu Item Definition Records to a Single Menu Item Master

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Double-click a master record to open it.
3. Click the **Insert** icon on the toolbar.
4. From the **Select a task to perform** drop-down list, select **Add Definition Records to this Master**.

    The Master field shows the Menu Item Master to receive the new definition records.
5. From the **Definitions to Add** list, select the number of definitions to create for the master.

    Up to 64 definitions can exist for one master record. Simphony ignores requests to create definitions greater than sequence number 64.

6. If the master record already has definitions configured, select an existing menu item definition to use as a template for the new definition record from the **Use Template** drop-down list.
7. (Optional) To add price records when creating the definition:
   a. Select **Insert Price Records**.
   b. If you are not using a definition template, select the **Number of Price Records** to create for the definition, and then enter the default **Price** for the new price records.

      If using a definition template, Simphony copies the price records from the template record.
8. Click **OK** to confirm.
9. Configure the definitions. See Configuring Menu Item Definitions for instructions.

Configuring Menu Item Definitions

The Major and Family Groups assigned to the corresponding Master are shown here for reference and are generally used for filtering purposes.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. From the Search Criteria section, select **Menu Item Definition** from the **Record Type** field's drop-down list, and then click **Search**. Double-click the desired record to open it to Form view.
3. Click the **General** tab, and then configure information for the fields described in the following table:

Table 23-1 Menu Item Definition Fields

Field	Description
Def Sequence #	If more than one definition exists for this item, select the Menu Item (MI) Definition number to change to another definition of this item. For example, a Vodka menu item can have two definitions: one appears on a SLU and prompts for a modifier; and another as the item that is prompted for, for instance, if a Martini requires the type of Vodka. The definition sequence number is the number of the definition in the revenue center for the master record. Up to 64 definitions can exist in one revenue center for a single Menu Item Master record.
(Optional) First Name	Enter the name for the MI Definition, which appears on the workstation, KDS Displays, guest checks, customer receipts, and order device output.

Table 23-1 (Cont.) Menu Item Definition Fields

Field	Description
(Optional) Second Name	Enter an alternate second name for the menu item to use on touchscreen keys or order device output depending on Menu Item Classes options **18 - Print Name 2 on Order Output instead of Name 1** and **19 - Use Name 2 on Touchscreens instead of Name 1**. Leave this field blank to use the First Name by default. The output to order device printers appears double wide, showing fewer characters than single wide output. Oracle recommends enabling option **18 - Print Name 2 on Order Output instead of Name 1**, because only 12 characters print to order devices, but 16 are allowed as the Definition Name. **Second Name** is sometimes used when the kitchen staff does not use the native language. This field is also used when Order Devices option **11 - Print Both Menu Item Names** is set for a wine order device. This allows the **First Name** of the wine, while the **Second Name** represents the Bin number and type of wine.
(Optional) Third Name	Enter the third name for a definition to use for search operations with the **Order Menu Item By Name 3** function key.
(Optional) Long Descriptor	Enter the descriptor to print on guest checks and receipts, below the menu item and price.
Menu Item Class	Select the Menu Item Class to assign to this definition.
Print Class Override	Select the Print Class for the menu item definition to override its menu item class setting. Select option **0** to use the menu item class setting.
KDS Prep Time Minutes Seconds Negative	Enter the time it takes to prepare the menu item, in **Minutes** or **Seconds**. If the item has a negative prep time (for example, a condiment that changes the item's prep time), select the **Negative** check box.
SLU through SLU 8	Select the relevant SLU numbers.
SLU Sort Priority	If you are using SLUs, enter a SLU sort priority number (between 1-99) for the menu item. Use this field when Touchscreen Style option **Sort Screen Using Menu Item Sort Priorities** is set. When configured, menu items with Sort Priority 1 appear on the screen first, followed by menu items with Sort priority 2, and so on up to Sort Priority 99, and then finally Sort Priority 0 items.
(Optional) NLU Group	Select the number of the NLU Group to assign to this menu item.
(Optional) NLU Number	Enter the NLU number for the menu item. Up to 12 digits are allowed.

Table 23-1 (Cont.) Menu Item Definition Fields

Field	Description
Main Level	Select the Main Levels on which the definition is active (for example, you can use this field for menu item sizes, such as Small, Medium and Large, or for serving periods, such as Happy Hour). Click **All** to make the definition active on all Main Levels. Click **None** to deselect all Main Levels.
Sub Level	Select the Sub Levels on which the definition is active. Click **All** to make the definition active on all Sub Levels. Click **None** to deselect all Sub Levels.
Prefix Level Override	Select to allow the condiment prefix to override the price level of the item it modifies. You must select **65 - Support Enhanced Prefix Mode (Parent Only)** in the Menu Item Class module.
(Optional) Surcharge	Enter the surcharge for the menu item, if **4 - Surcharge** is enabled in the Tax Rates module.
Tare Weight	Enter the weight of the empty package for an item that is sold by weight (for example, the weight of the salad container at a salad bar, where salad is sold by weight). The Tare Weight should not be more accurate than your scale can measure so that the application does not round. For kilograms this is to the thousandth 0.000, for pounds the hundredth 0.00, and for ounces the tenth 0.0.
Guest Count	Enter the guest count for the menu item to increment the check guest count when added. For example, if a catering order consists of 2 Catering Appetizer Platters, each representing 10 guests as defined here, the guest count on the check will be 20. You must select **11 - Add to Guest Count** in the Menu Item Class module. This value does not affect the guest count when **8 - Use Number of Seats for Guest Count** is set in the Revenue Center Parameters module. If the workstation operator presses the **Number of Guests** key during a transaction, the guest count no longer increments when menu items are added to the check.
(Optional) Quantity	For some menu items, you might want to assign a quantity (greater than one) to a single MI Definition record. For example, you could have one MI Definition record for ½ Dozen Donuts (whose assigned Quantity setting is 6). The default value of the **Quantity** field is one (1). The **Quantity** field is accessible from a MI Definition record and then switching to Table view. The MI Definition Quantity field also links to and enhances the Menu Item Tax Class Override feature. Configuring the Menu Item Tax Class Override contains more information about menu item tax class overriding.

Table 23-1 (Cont.) Menu Item Definition Fields

Field	Description
(Optional) Consumer Advisory Description	This field is meant for Simphony Transaction Services (STS) Gen 2 users who want to provide dietetic information to customers. Allergen, Nutrition and Consumer Advisory Information contains more information about configuring these fields.

4. Click **Save**.

Allowing Users to Override Restricted Menu Item Ranges

You can allow users to add, edit, and delete menu item master records, definitions, and prices for menu item object numbers that are set as restricted in the Properties module.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click an employee role.
3. Click the **EMC Modules** tab.
4. From the Menu Items section, select the **Edit** privilege option for **Menu Item Master Restriction**.
5. Click **Save**.

Configuring Menu Tag Groups and Tags

A delivery service provider menu is a collection of Simphony menu items. Use a menu tag to associate a Simphony menu item with the delivery provider menu. Each provider must have a unique menu tag in Simphony. Only the menu items with these tags are visible in the delivery provider application.

You need to have the role privilege to view, edit, add, or delete tags. Creating Employee Roles contains more information about setting these privileges for tags in the Roles module, EMC Modules tab.

Simphony retains all tag activity (including add, edit, and delete) for use in auditing.

1. To add a tag group:
   a. Select the Enterprise level, click **Descriptors**, and then click **Tag Groups**.
   b. Click the insert icon
   (
   
) on the toolbar.
   c. Add a new tag group record with the appropriate name, and then click **OK**.
   d. Click **Save**.
2. To add a tag:
   a. Select the Enterprise level, click **Descriptors**, and then click **Tags**.
   b. Click the insert icon
   (


) on the toolbar.

c. Add a new tag record with the appropriate name (for example, Online Only), and then click **OK**.

   You cannot duplicate tag names.

d. Select the **Tag Group**.

e. Click **Save**.

3. To edit a tag:

   a. Select the Enterprise level, click **Descriptors**, and then click **Tags**.

   b. Change the tag name in the **Name** column.

   c. Click **Save**.

4. To delete a tag:

   If you delete a tag that is associated with a menu item definition, the association is also deleted.

   a. Select the Enterprise level, click **Descriptors**, and then click **Tags**.

   b. Highlight the tag record, click the delete icon
   (
   
) on the toolbar, and then click **Yes**.

   c. Click **Save**.

5. To associate a tag with a menu item definition, see Associating a Menu Item Definition with a Tag for detailed instructions.

Associating a Menu Item Definition with a Tag

Menu tags need to be added in the Tags module before associating them with a menu item definition. Configuring Menu Tag Groups and Tags contains more information about adding tags.

Simphony Transaction Services Gen 2 uses tags to filter and to group menu item definitions. A menu item definition record can be associated with more than one tag. The menu item master record must have at least one menu item definition to enable the Tags tab in the Menu Item Maintenance module.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Double-click the menu item master record corresponding to the definition to open it.
3. Click the **Tags** tab.
4. Click the **Add** link.

   By default, the first tag from the Tags module appears.

5. To change the tag, click the ellipsis (**…**), select the new tag from the list, and then click **OK**.
6. To change the tag name, click inside the **Tags** column and edit the text.
7. If the menu item master record has more than one menu item definition, click the **Next Def Seq** link, and then click the **Add** link again for another tag.

8. Click **Save**.

Allergen, Nutrition and Consumer Advisory Information

Administrators can configure allergen, consumer advisory, and nutrition related menu item content in the EMC. This information can be used in Oracle API interfaces to meet legal requirements where necessary. The allergen, nutrition, and consumer advisory details are supported in the Simphony Transaction Services (STS) Gen2 configuration service responses, such as self-service kiosks or Enterprise online ordering.

The allergen, nutrition, and consumer advisory content is configured for individual menu item definitions. Each menu item definition can have multiple allergens and multiple nutrition entries configured. One consumer advisory description is allowed per menu item definition.

The allergen, nutrition, and consumer advisory content is translatable. You can also change the nutritional content unit of measure for each language translation.

Simphony does not support the % of Daily Value or Serving Size.

Allergen

Simphony contains a fixed list of allergens (for example, eggs, fish, peanuts, and milk) in the Allergens module at the Enterprise level. Administrators can create an allergen class using the Allergen Classes module, and then associate allergens to an allergen class. Then the allergen class can link to a menu item class. You can override the allergen class at the menu item definition level.

Nutrition

Administrators can configure nutritional values (for example, calories, total fat, saturated fat, and sodium) for each menu item definition. The nutrition information is typically found on a packaged goods label.

The Nutrition Names module provides a pre-defined list of nutrients available at the Enterprise level. This is a reference list used for entering nutritional details and cannot be modified.

You can use the Nutrient Sets module, available at the Enterprise level, to create a set of nutritional details that can be associated with a menu item definition. For example, you can add nutritional content for a Chicken entrée to a Chicken nutrient set, with details of calories, dietary fiber, carbohydrates, total fat and protein, and link this nutrient set to the menu item definition for the Chicken entrée.

The Menu Item Definition module has a Nutrition tab that is used to add nutritional details based on the defined nutrient sets. You can use the Nutrition tab to link Nutrient Sets to the menu item definition.

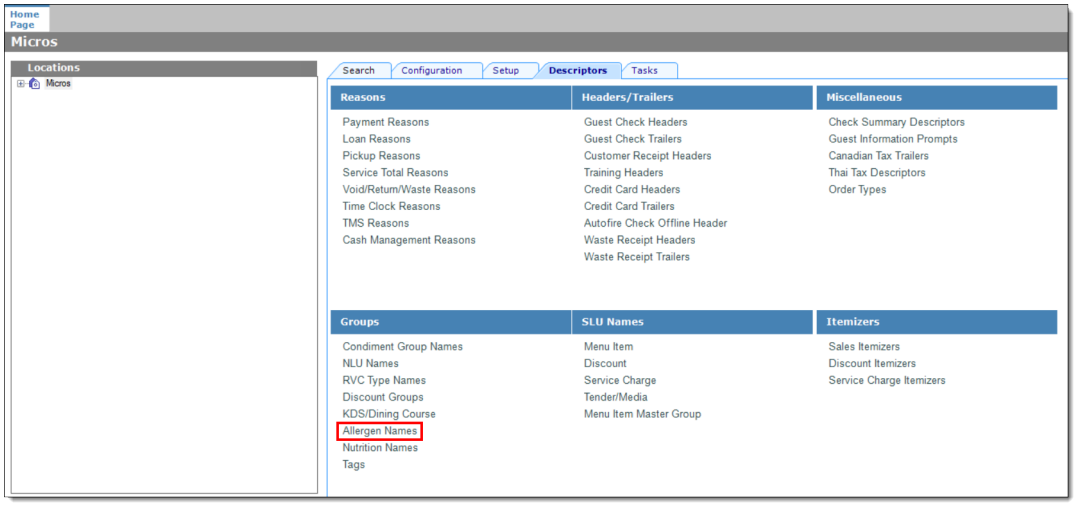
Consumer Advisory

A consumer advisory provides information about the risks of eating raw or undercooked menu items. An example of a consumer advisory description is: Consuming raw or under-cooked meats, poultry, seafood, shellfish, or eggs may increase your risk of foodborne illness.

Creating Allergen Classes

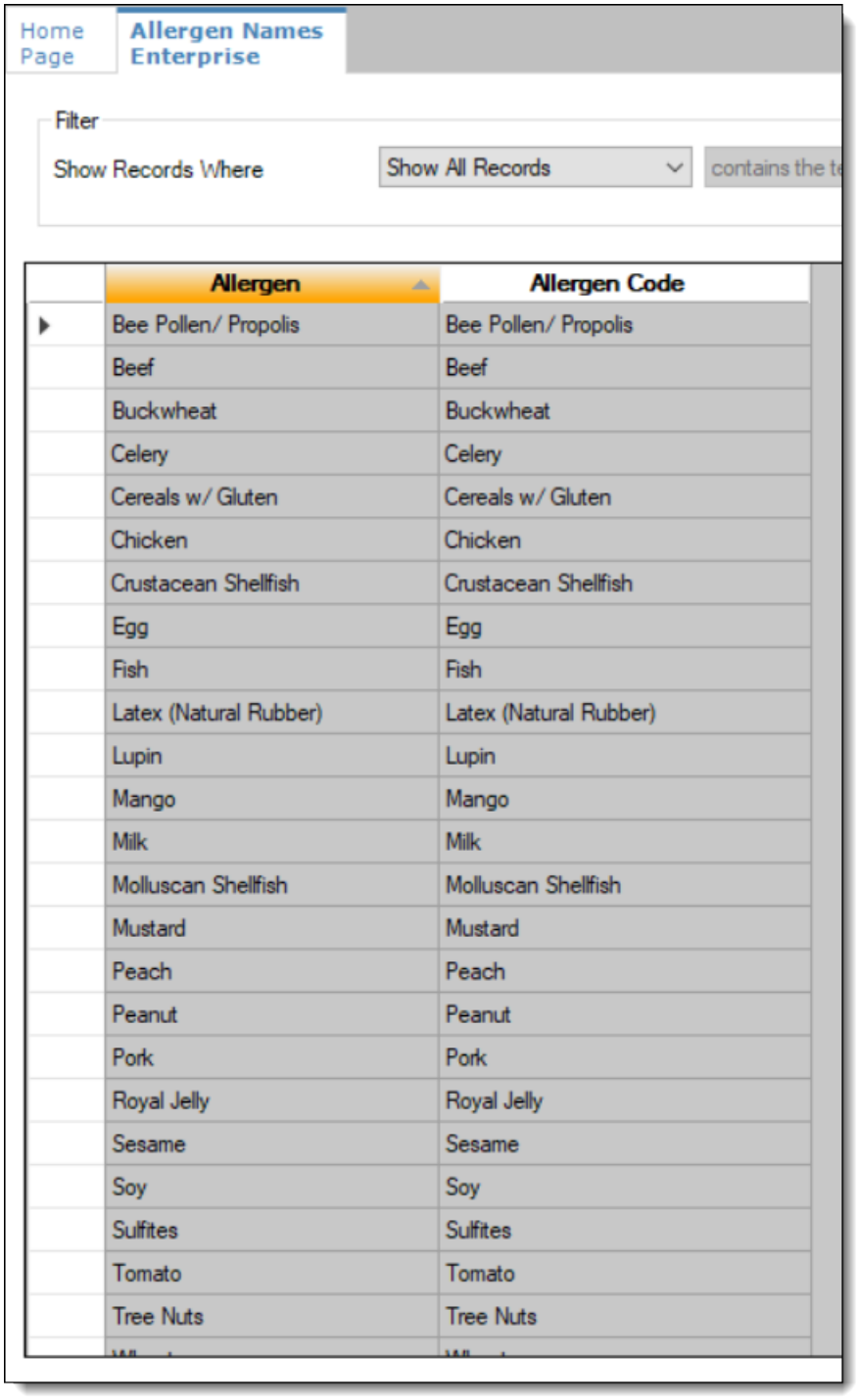
1. Select the Enterprise level, click **Descriptors**, and then click **Allergen Names**.

Figure 23-1 EMC Enterprise Descriptors Tab - Allergen Names



- The module has several pre-configured allergen names/codes.

Figure 23-2 EMC Allergen Names Module



- The existing allergen names and codes cannot be edited or deleted; however the text can be translated.

2. To insert new allergen names:

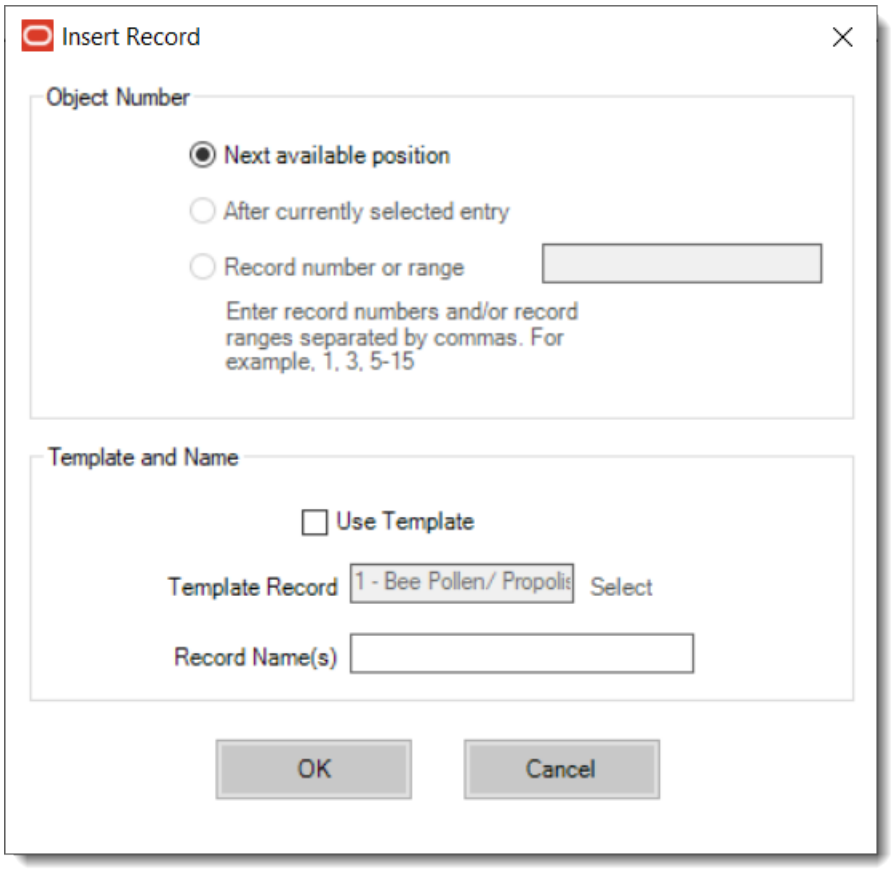
a. Click the insert icon

on the toolbar.

b. After adding a record, click **OK**, and then click **Save**.

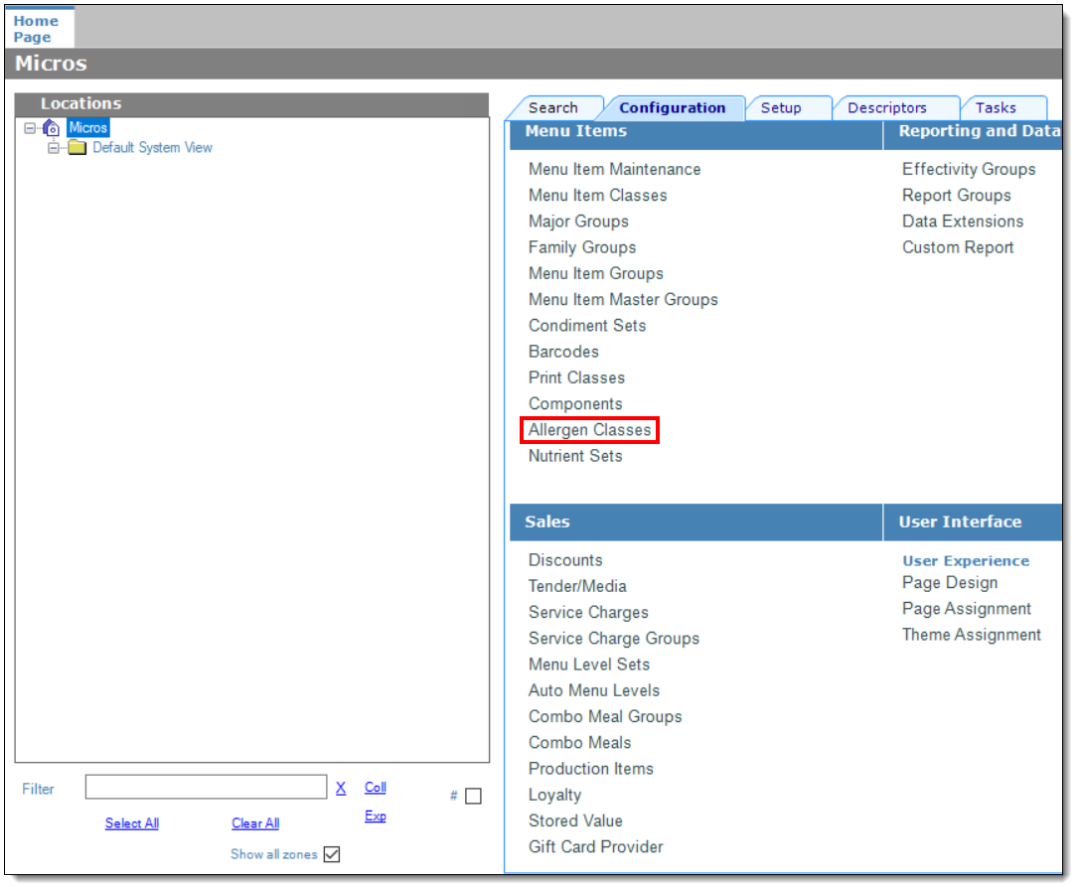
The system does not allow duplicate allergen names.

Figure 23-3 Inserting Allergen Names



3. Select the Enterprise level, click **Configuration**, and then click **Allergen Classes**.

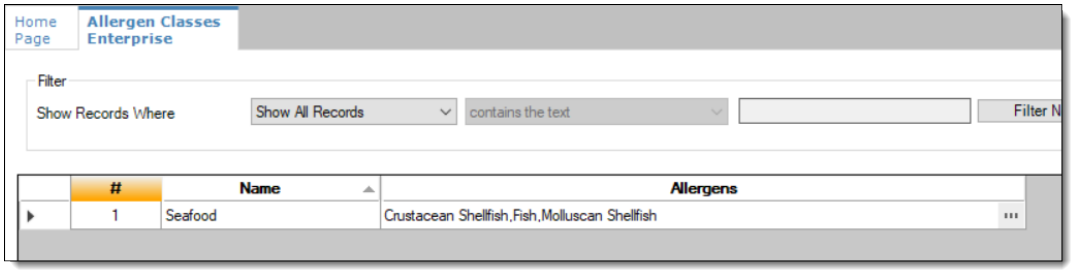
Figure 23-4 EMC Configuration Tab - Allergen Classes



4. Insert a new record and enter a name for the allergen class.

   You can configure the Allergen Classes module from either table or form view. In table view, if more than one allergen is selected, allergens are listed and comma separated.

Figure 23-5 Allergen Classes - Table View



5. Based on the allergy class' name, select the allergen you want to include in the class.

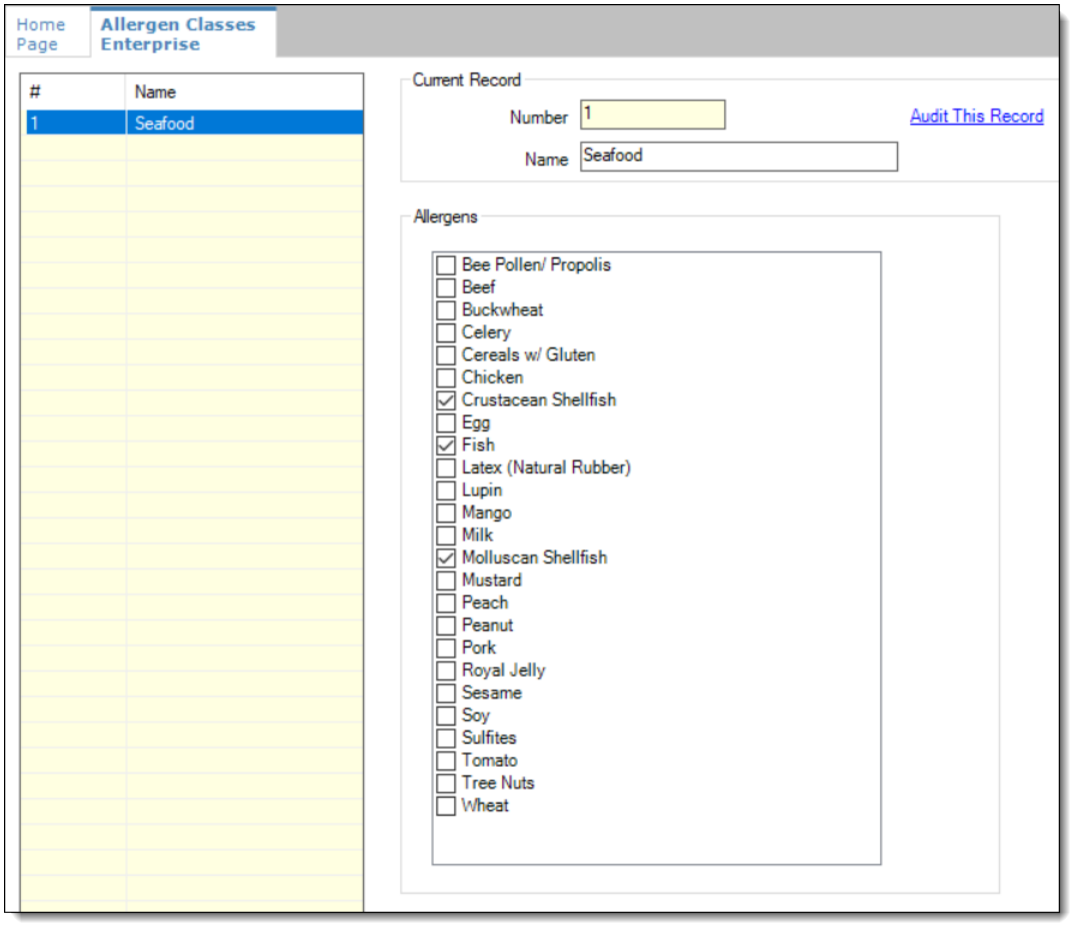
   You can select more than one allergen. Switch to form view by using the toggle icon on the toolbar

   , or double-click the record.

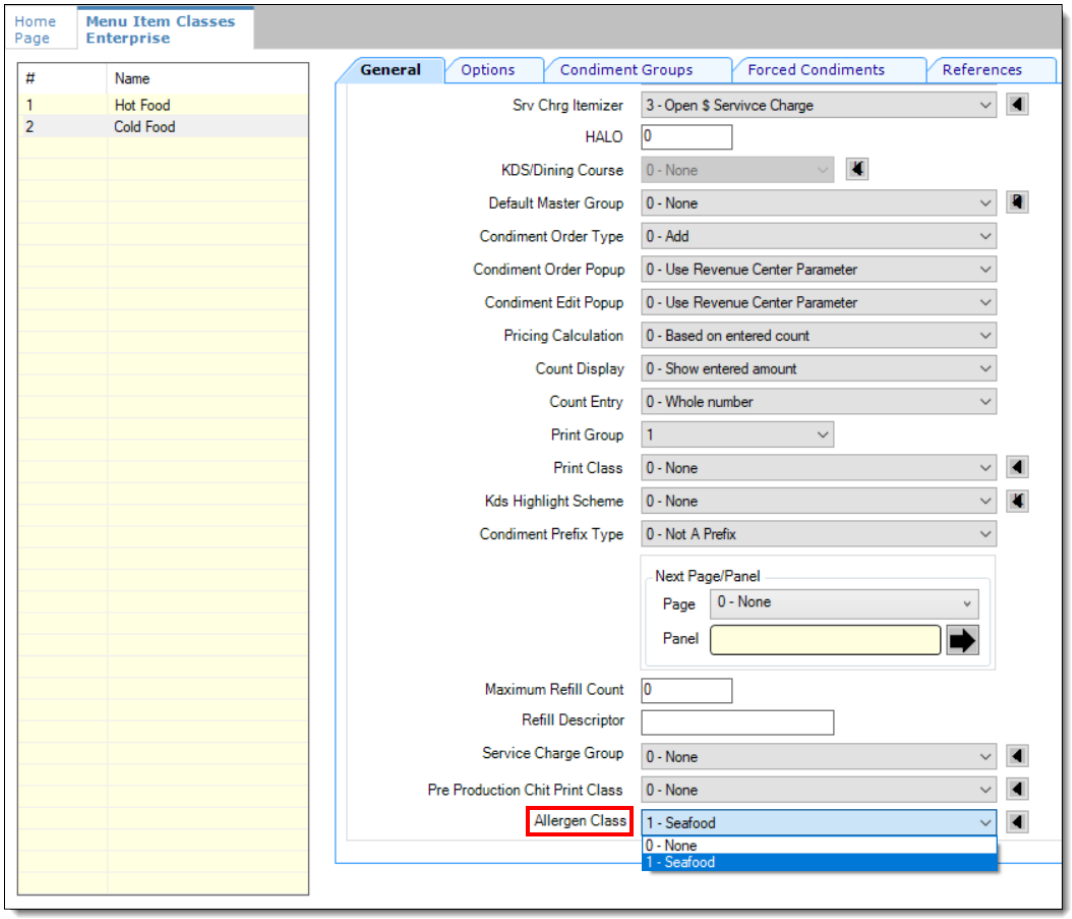
   This is an example of an allergen class named Seafood. Each allergen selected here is seafood related.

Figure 23-6 Allergen Classes - Form View



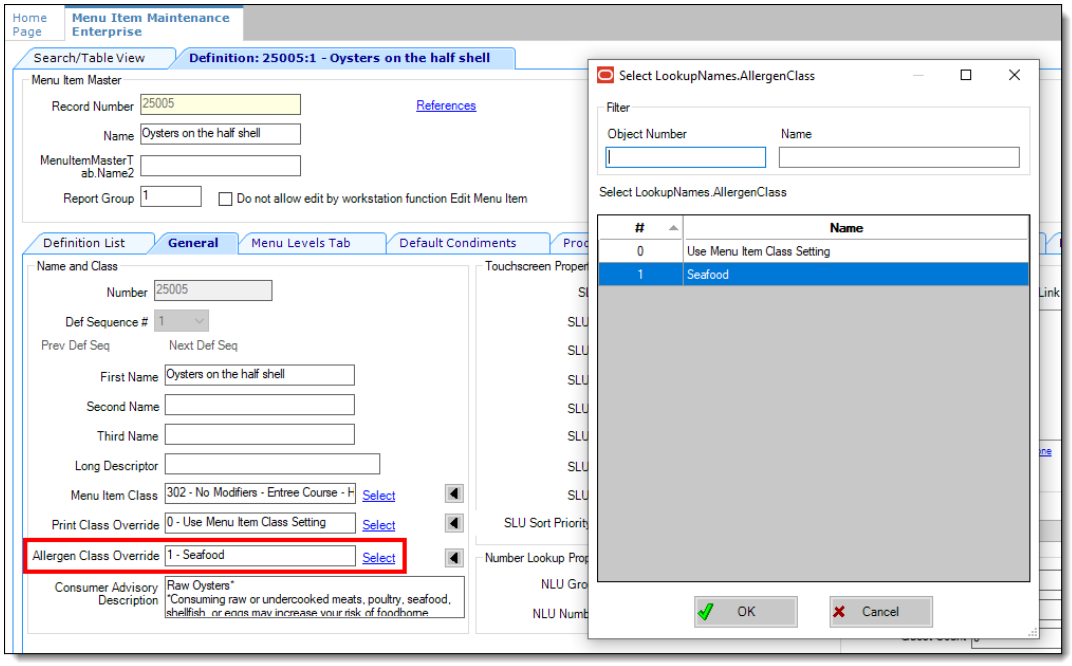
6. Create as many allergen classes as needed, and then click **Save**.
7. Select the Enterprise, property, or revenue center level, click **Configuration**, and then click **Menu Item Classes**.
8. On the **General** tab, assign an allergen class from the drop-down list in the **Allergen Class** field, and then click **Save**.

Figure 23-7 Menu Item Classes - Allergen Class Field



9. Select the Enterprise, property, or revenue center level, click **Configuration**, and then click **Menu Item Maintenance**.
10. Search **Menu Item Definition** records for items you wish to assign an allergen class.
11. On the record's **General** tab, select the allergen class from the drop-down list that you want to assign to the menu item class from the **Allergen Class Override** field, click **OK**, and then click **Save**.

Figure 23-8 Menu Item Definition - Allergen Class Override Field



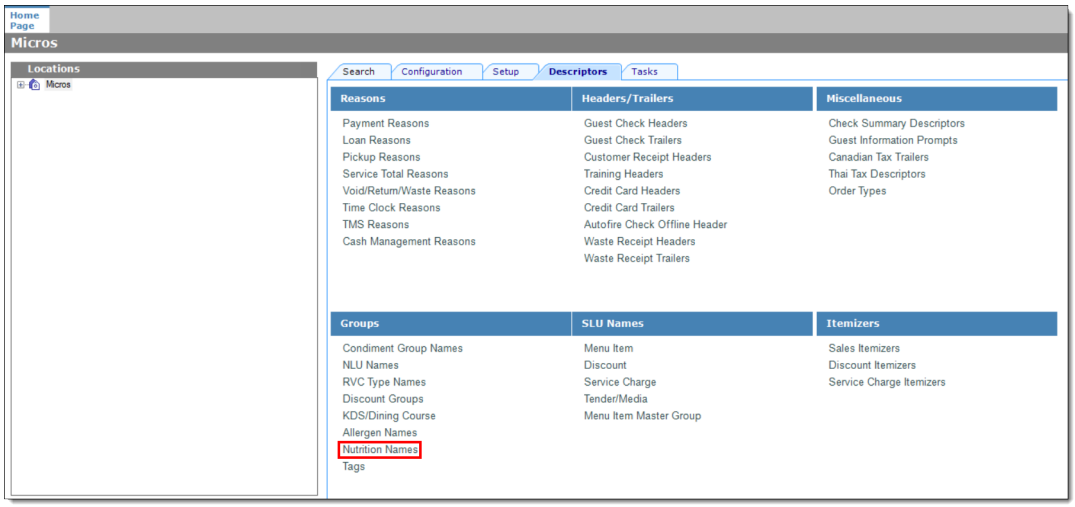
Configuring Nutrition Settings

To configure nutritional information for menu items:

> **Note:**
>
> Even though the EMC shows a pre-configured list of nutrient records, you can only specify calorie information for Uber Eats.

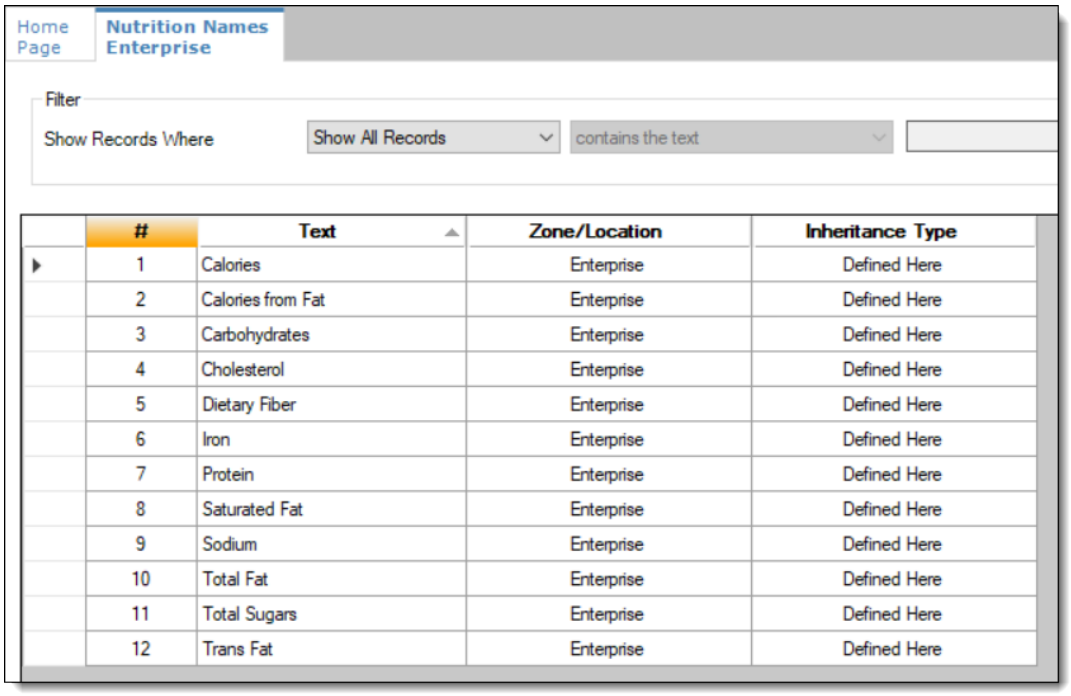
1. Select the Enterprise level, click **Descriptors**, and then click **Nutrition Names**.

Figure 23-9 EMC Enterprise Descriptors Tab - Nutrition Names



The EMC shows pre-configured nutrient records. No new nutrient records can be added at this time. These existing nutrient names cannot be edited or deleted, but you can translate the nutrient names in the **Text** column.

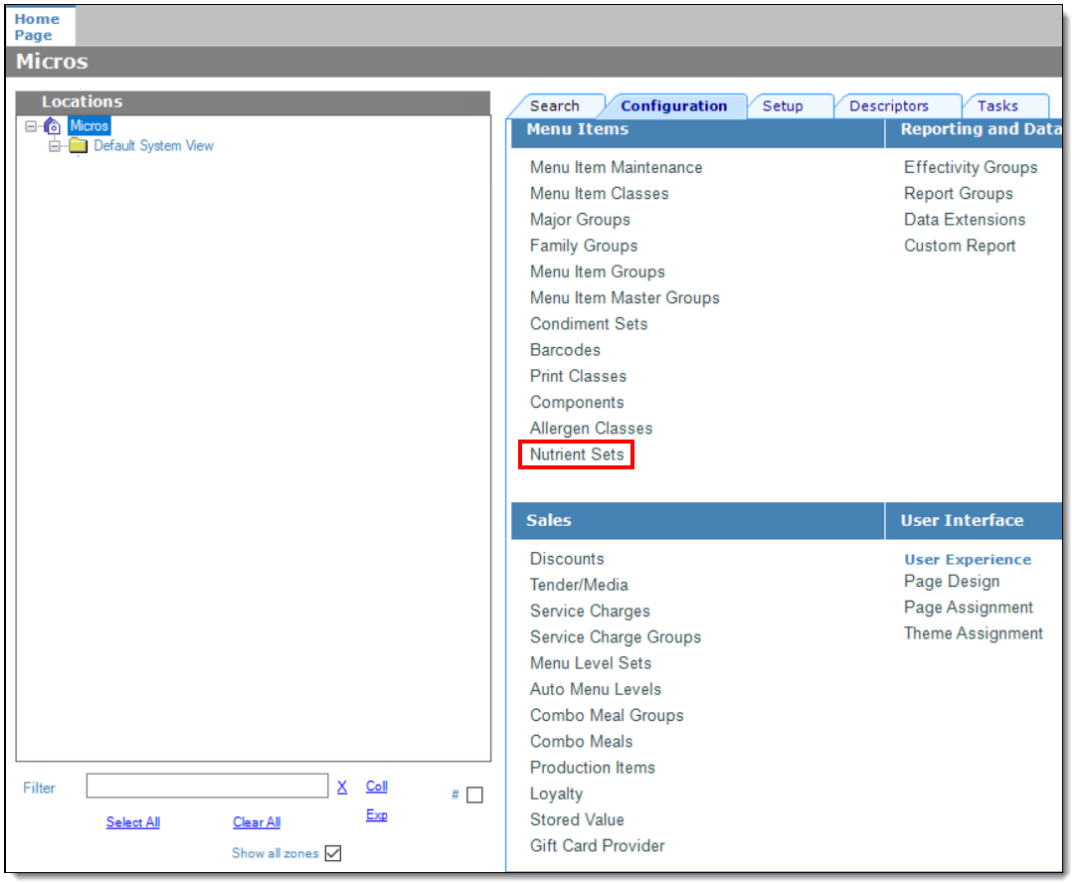
Figure 23-10 EMC Nutrition Names Module



#	Text	Zone/Location	Inheritance Type
1	Calories	Enterprise	Defined Here
2	Calories from Fat	Enterprise	Defined Here
3	Carbohydrates	Enterprise	Defined Here
4	Cholesterol	Enterprise	Defined Here
5	Dietary Fiber	Enterprise	Defined Here
6	Iron	Enterprise	Defined Here
7	Protein	Enterprise	Defined Here
8	Saturated Fat	Enterprise	Defined Here
9	Sodium	Enterprise	Defined Here
10	Total Fat	Enterprise	Defined Here
11	Total Sugars	Enterprise	Defined Here
12	Trans Fat	Enterprise	Defined Here

2. Select the Enterprise level, click **Configuration**, and then click **Nutrient Sets**.

Figure 23-11 EMC Configuration Tab - Nutrient Sets

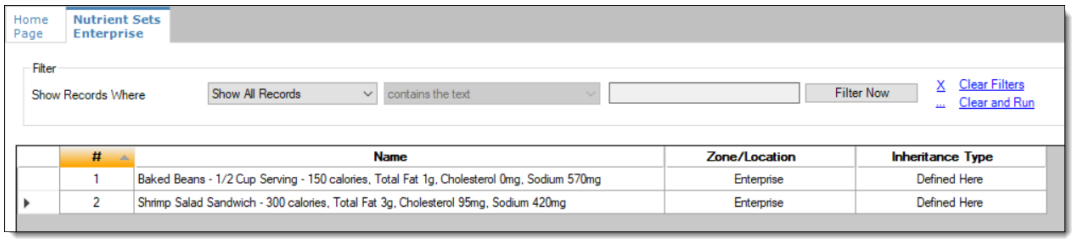


3. To insert new nutrient set records, click the insert icon



on the toolbar.

Figure 23-12 Nutrient Sets - Table View

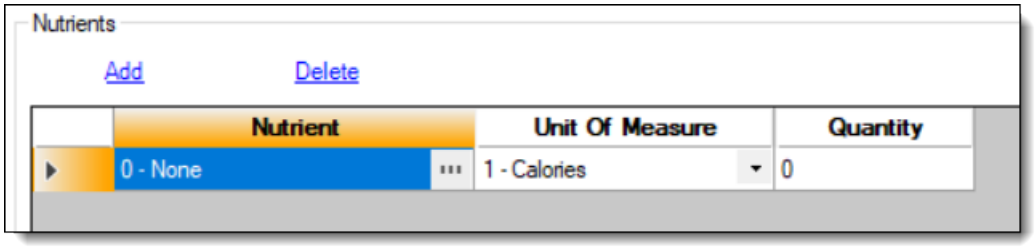


4. Enter the nutrient set name in the **Name** field.
5. Switch to form view by clicking the toggle icon on the toolbar



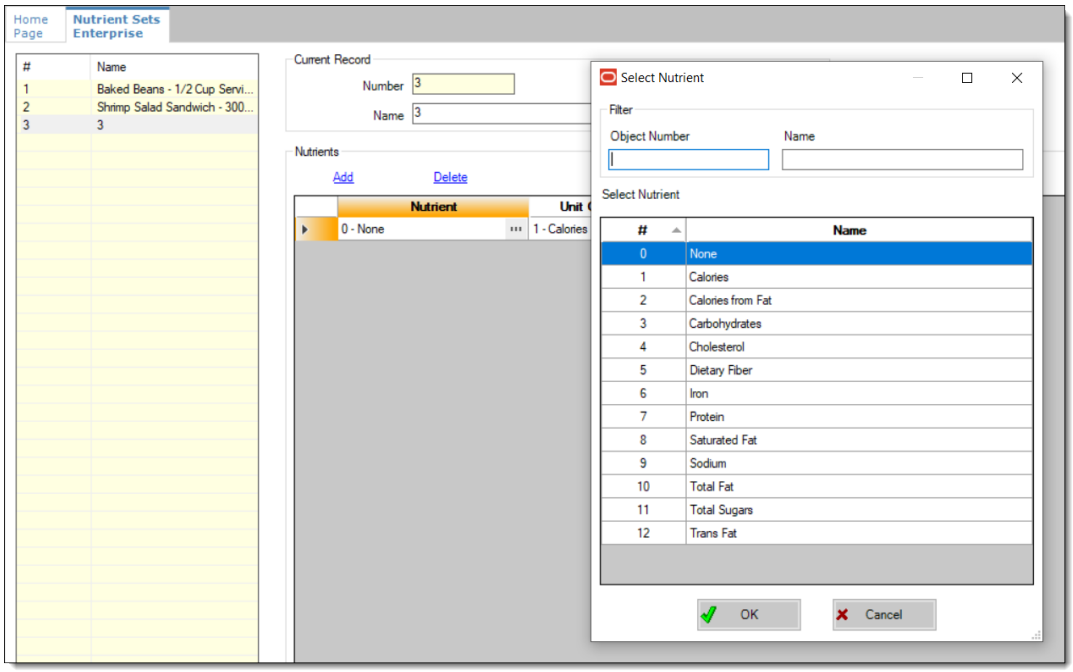
, or double-click the record. In the **Nutrients** section, click **Add** to insert and configure nutritional information.

Figure 23-13 Nutrient Sets - Adding Nutrients



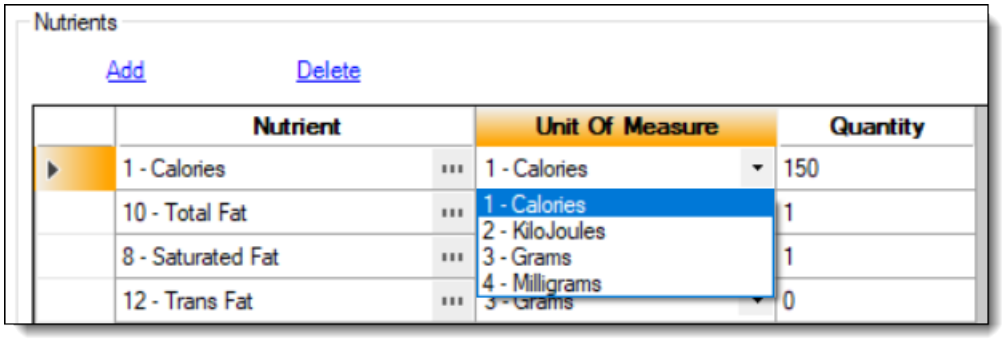
6. In the **Nutrient** column, click the ellipsis (**...**), select the nutrient type from the drop-down list, and then click **OK**. Repeat this step for each nutrient you add to the record.

Figure 23-14 Adding Items to Nutrient Sets



7. In the **Unit of Measure** column, select the appropriate measurable for each nutrient. The available units are:
   - Calories
   - Kilojoules
   - Grams
   - Milligrams

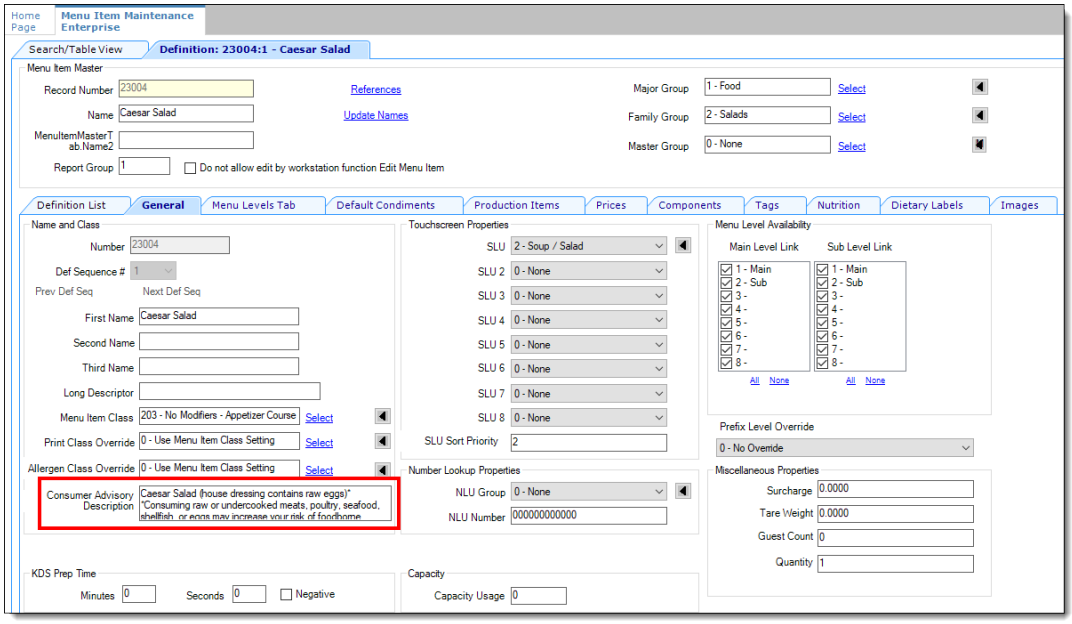
Figure 23-15 Nutrient Sets - Unit Of Measure Column



8. In the **Quantity** column, enter the numerical value associated with each unit of measure type, and then click **Save**.
9. Select the Enterprise, Property, or Revenue Center level, click **Configuration**, and then click **Menu Item Maintenance**.
10. Search **Menu Item Definition** records for items you wish to assign nutrition sets.
11. (Optional) Open a menu item definition record and enter text in the **Consumer Advisory Description** text box.

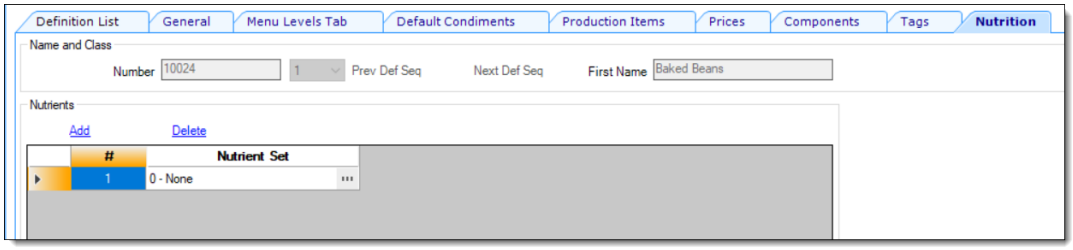
    The text shown in the following image contains the disclosure in the **Consumer Advisory Description** field. There is a character limit of 1,024 for this field.

Figure 23-16 Menu Item Definition Record - Form View



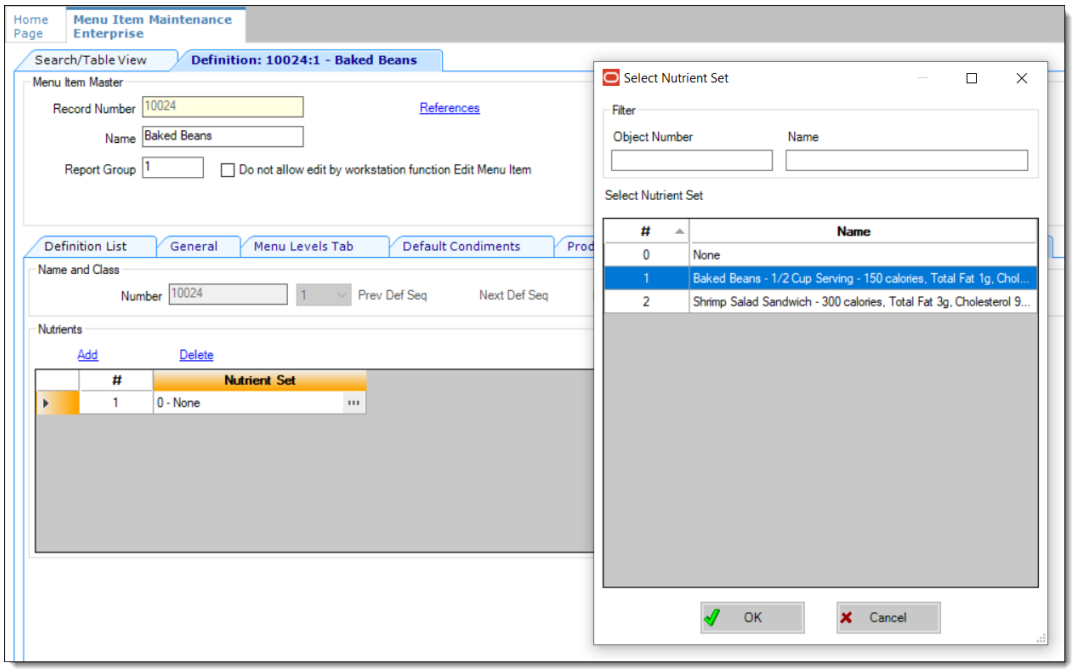
12. Open a menu item definition record, and then select the **Nutrition** tab.
13. In the **Nutrients** section, click the **Add** link.

Figure 23-17 Menu Item Definition Record - Nutrition Tab



14. In the **Nutrient Set** column, click the ellipsis (**...**), select the nutrient set from the drop-down list, and then click **OK**.

Figure 23-18 Adding Nutrient Sets to a Menu Item Definition Record



15. You can add more than one nutrient set to a menu item definition record. Repeat these steps for each menu item definition record for which you want to add nutrient sets.

    Adding Nutrient Sets to menu item definition records cannot be performed from table view. You need to manually add each Nutrient Set to each individual menu item definition record.

16. Click **Save**.

Adding Dietary Labels to Menu Item Masters

To configure and add dietary labels to menu item masters:

1. Select the Enterprise or property level, click **Configuration**, and then click **Roles**.
2. Double-click the employee record, and then click the **EMC Modules** tab.
3. In the bulk operations list, scroll to the **Dietary Labels** row, and ensure the necessary operations are selected.
4. Click **Save**.

5. Select the Enterprise level, click **Descriptors**, and then click **Dietary Labels**.
6. Add dietary label records as needed. If you delete a dietary labels record, this will in turn delete all dietary labels associated with a menu item.

   The **Use Template** function is not supported in the Dietary Labels module.
7. Click **Save**.
8. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
9. Search for and then double-click the menu item master record, and then click the **Dietary Labels** tab.
10. In the **Dietary Labels** section, click **Add**, and then click the **...** button.
11. Select the dietary label for the menu item, and then click **OK**.
12. Repeat Steps 10 and 11 to add more dietary labels.
13. Click **Save**.

24

Menu Item Prices

A menu item price is the amount charged for the sale of a menu item. In Simphony, menu item prices are configured per menu item definition. Typically a menu item definition has one price. However, in some cases a definition has multiple prices (for example, separate prices for a small, medium, and large soda), or no price (common for condiments).

When multiple prices are active for the current Main or Sub Level, the workstation searches the prices assigned to the definition starting with price sequence number 1, then price sequence number 2, and so on. The workstation adds the first price that meets the active level to the check. For example, based on the configuration described in the following table, the item price is $8.00 when ordered on menu level 7, and $4.00 when ordered at any other level. The workstation's logic is:

- The current level of the transaction is level 5.
- Price number 1 for the item is active on level 7. Continue to the next price.
- Price number 2 for the item is active on level 0. This represents any level. The item is $4.00.

Table 24-1 Correct Menu Prices and Levels

Price Sequence Number	Price	Level
1	8.00	7 - Double
2	4.00	0 - All Levels

When configuring multiple prices, you must always configure the 0 - All Levels price level as the last price sequence number for the definition. For example, in the following table, the configurations in the previous table are reversed.

Table 24-2 Incorrect Menu Prices and Levels

Price Sequence Number	Price	Level
1	4.00	0 - All Levels
2	8.00	7 - Double

The workstation's logic is:

- The current level of the transaction is level 7.
- Price number 1 for the item is active on level 0; this includes all levels. The item is $4.00.

The item price $8.00 never becomes active because the 0 - All Levels price level is set as the first price sequence for the definition.

Configuring Menu Item Prices

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.

2. Click **Search** to show all menu items, and then double-click a menu item master record.
3. Click **Prices**, and then click the **Insert** button on the toolbar.
4. From the **Prices to Add** field, select **Price Sequence #1**, enter the **Default Price** for the menu item, and then click **OK**.
5. Configure the price record. The following table describes the price record fields:

Table 24-3 Price Record Configuration Fields

Field	Description
Price	Enter the menu item price amount.
(Optional) Prep Cost	Enter the menu item prep cost. This field is grayed out for properties that have Inventory Management enabled.
Tax Class Override	To allow the menu item price to use a different tax class than the tax class configured for the menu item definition, select a new tax class from the list. If you select **0 - None**, the price uses the tax class configured for the menu item class associated with the menu item definition.
Service Charge Group	If the price includes a service charge, select a service charge group from the list.
Active on Level	Select the main or sub menu level in which this price becomes active. Select **0 - All Levels** to make the price active for all menu levels.
Effectivity Group	To make the price active at a specific date and time, select the corresponding effectivity group from the list.
Effectivity Status	Shows the current availability of the price record based on the record's effectivity group setting.

6. Click **Save**.
7. Repeat Steps 3 through 6 to add price definitions for the menu item.

   See Configuring Effectivity Groups for more information.

Configuring Menu Item Prices for Multiple Definitions

You can define price records for multiple menu item definitions simultaneously.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. (Optional) In table view, click the **Definition Records** tab, and then select the definitions for which to add the new price records.

   This is the most common method of adding prices to definitions.
3. Click **Insert** on the toolbar.
4. From the **Select a task to perform** drop-down list, select **Add Prices to Definitions**.

5. To insert the new price records to the definitions you selected in Step 2, select **Selected Records** from the **Range Type** drop-down list.

   This is the default setting if Menu Item Definitions are active in table view and you selected at least one menu item definition before accessing the Add Menu Items dialog. The selected records show beneath the **Range Type** drop-down list.

6. To insert the new price records into a range of menu item definitions:

   a. Select **Select Range** from the **Range Type** drop-down list.

   b. Select the first and last definition records to receive the new prices from the **Begin Range** and the **End Range** fields respectively.

7. From the **Prices to Add** list, select the price sequences to add for each menu item definition selected, and then enter the **Price**.

   Simphony ignores requests to create the same price sequence for a definition multiple times and requests to create prices greater than sequence number 8. For example, if a definition already has six prices and you choose to add three prices, Simphony does not create price 9.

8. Select the **Menu Level** in which the new price records become active, and then click **OK**.

   Prices are active on either the sub level or the main level, as dictated by the Menu Item Definition's class.

25
Menu Levels

Simphony uses menu levels to:

- Determine which sales items (Menu Items, Discounts, Service Charges, Tender/Medias) are available in a transaction.
- Allow different prices for one menu item.

A main menu level and a sub menu level are always active. You can determine which levels are active by default (using the menu level hierarchy) and allow workstation operators to change the levels during a transaction using a function key or menu level pop-ups. You can also configure the status bar in the upper or lower area of the workstation to show main and sub level names that are active.

Auto Menu Level

You can set the main menu level, sub menu level, or both to change automatically at a specific time of day. This configuration is called auto menu level, and controls the availability of sales detail items. For example, a revenue center can offer an Early Bird Special (Burgers are $5.00) every weekday from 3:00 p.m. to 6:00 p.m. For the Early Bird Special to automatically occur, you can set an auto menu level from 3:00 p.m. to 6:00 p.m. Monday through Friday. Set menu item definitions with multiple prices accordingly (one price for the Early Bird level and another general price).

If you configure auto menu levels to overlap, menu levels become active based on the order in which you set the auto menu levels. After the workstation determines that one level is active, it does not look at the other auto menu levels. Therefore, you must pay special attention when configuring multiple auto menu levels that occur on the same days at the same times.

According to the configuration in the following table, at 3:00 p.m. the main level become 2 - Early Bird, and at 4:00 p.m. the main level becomes 3 - Free Drinks. This occurs because the Free Drinks level is set at auto level 1, and starts after Early Bird, which is set at auto level 2.

Table 25-1 Example of Correct Auto Menu Levels

Number	Main Level	Start Time	End Time	Days Active
1	3 - Free Drinks	16:00	17:00	Monday–Friday
2	2 - Early Bird	15:00	18:00	Monday–Friday

The workstation's logic for these two menu levels is explained in the following table.

Table 25-2 Workstation Logic

Time	Logic
15:00	Is auto level 1 active? No Is auto level 2 active? Yes. Active main level is 2 - Early Bird
16:00	Is auto level 1 active? Yes. Active level is 3 - Free Drinks

Table 25-2 (Cont.) Workstation Logic

Time	Logic
17:00	Is auto level 1 active? No Is auto level 2 active? Yes. Active main level is 2 - Early Bird
18:00	Is auto level 1 active? No Is auto level 2 active? No The main level is 1 - Regular, which is the default menu level for the revenue center

Menu Level Hierarchy

The following menu level hierarchy determines which setting controls the default transaction menu levels:

Table 25-3 Menu Level Hierarchy

Number	Enterprise Management Console (EMC) Configuration	Description
1	Serving Periods	If the active serving period has a main or sub level that is not 0, that is the active main or sub level.
2	Auto Menu Levels table	If the time of day falls during an active auto menu level, the main or sub level that is specified for that auto menu level is the active level.
3	Transaction Menu Level Defaults	If the main or sub level set in the RVC Parameters module is not 0, that is the active main or sub level.
4	Main 1 and sub 1 are always defaults	If the other hierarchy rules have not been met, the workstation defaults to main level 1 and sub level 1.

Menu Level Configuration Tasks

Setting up menu levels consists of completing the following tasks:

- Set up main, sub, and custom menu levels
- Configure the default main and sub levels for serving periods
- Configure auto menu levels
- Configure the default menu levels for a revenue center
- Configure the active menu levels for menu item definitions, prices, discounts, service charges, and Tender/Media
- Configure the functionality of menu items at the workstation

Setting Main, Sub, and Custom Menu Levels

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Level Sets**.

The **Type** column specifies whether the Menu Level Set refers to the Main Levels, the Sub Levels, or to the levels defined within the record. Main Levels and Sub Levels are not configured in this module. However, you can create an entry for the entire Main Level Set and Sub Level Set in this module; this allows you to configure the Options and Default Master Group fields for Main and Sub levels.

2. To create a custom menu level, insert a new record, and then enter a custom level set name.
3. To define main menu levels, double-click **Main**.
4. To define sub menu levels, double-click **Sub**.
5. To define menu levels for a custom level set, double-click the new custom level that you created in Step 2.
6. Select the appropriate options:
    a. To change the menu level to the default level when the workstation operator presses a touchscreen button corresponding to any menu level in this menu level set again, select **1 - Pressing level key again reverts to default level**.
    b. If the menu level set is bound to a Default Master Group and you want the POS client to switch the active parent menu item when the active menu level changes, select **2 - Bound to parent**.
7. (Optional) Select the **Default Master Group** for the menu level set.

    This field is used for conversational ordering. If a Default Master Group is assigned, when a Menu Level in this group is pressed, Simphony determines which item from the selected Menu Item Group (if any) to apply to the check.
8. In the Menu Level Entries section, define the menu levels.

    You can use Menu Levels to specify menu item sizes, such as Small, Medium, and Large, and serving periods, such as Happy Hour.
9. (Optional) Enter the **Prefix** or **Suffix** for each menu level to show on the check detail area and print on guest checks and customer receipts.
10. To define a menu level as the default level for the menu level set:
    a. In the Options column, click the ellipsis point (...) button adjacent to the default menu level.
    b. Select **1 - Default**, and then click **OK**.
11. To define a menu level as an anonymous level for the menu level set:
    a. In the Options column, click the ellipsis point (...) button adjacent to the anonymous menu level.
    b. Select **2 - Anonymous**, and then click **OK**.

    The Default and Anonymous menu levels are generic, and are typically used with $0.00 priced menu item definitions that have names such as [SIZE] Hot Drink or [TEMP] Drink.
12. Click **Save**.

Setting the Default Main and Sub Levels for Serving Periods

1. Select the revenue center, click **Configuration**, and then click **Serving Periods**.
2. Double-click a serving period record.
3. On the **General** tab, select the **Default Main Level**, and then select the **Default Sub Level**.

4. Click **Save**.

Configuring Auto Menu Levels

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Auto Menu Levels**.
2. In the **Start** column, enter the time at which the menu level becomes active.
3. In the **End** column, enter the time at which the menu level becomes inactive.
4. Select the **Main Level**, and then select the **Sub Level**.
5. Click the ellipsis point (...) button from the **Options** column.
6. Select **1 - This Entry is Active**, and then select one or more of the following options that correspond with the days that the menu level becomes active:
   - **2 - Active On Sunday**
   - **3 - Active On Monday**
   - **4 - Active On Tuesday**
   - **5 - Active On Wednesday**
   - **6 - Active On Thursday**
   - **7 - Active On Friday**
   - **8 - Active On Saturday**
7. Click **Save**.

Setting the Default Menu Levels for a Revenue Center

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. On the **General** tab, select the **Default Main Level**, and then select the **Default Sub Level**.

   The values configured in the **Default Main Level** and the **Default Sub Level** fields are available in the Serving Periods module. Configuring a Serving Period contains more information.
3. Click the **Options** tab, and then set the main and sub menu levels as follows:
   - To set the workstation to remain at the current main menu level after completing a transaction, select **23 - Retain Current Main Level after a Transaction**.
   - To set the workstation to remain at the current sub menu level after completing a transaction, select **24 - Retain Current Sub Level after a Transaction**.
4. Click **Save**.

Configuring Active Menu Levels for Menu Item Definitions and Prices

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Search for and then double-click a menu item master record.

3. If the menu item has multiple definitions, select a definition, and then click the **General** tab.
4. From the Menu Level Availability section, select the active main and sub levels for the item.
5. To set the menu item definition as active on all menu levels, click **All**.
6. To set the menu item definition as active on a custom menu level:
    a. Click **Menu Levels Tab**, select a **Menu Level Set**, and then select the menu levels.
    b. To set the definition as active on all custom levels, select **Active on All Levels**.
7. If the menu item has multiple price records click **Prices**, and then select the **Active Menu Level** for each price definition.

    When menu items are assigned to a class which uses sub level pricing (Menu Item Class option **10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing** is set), Simphony lists sub levels.
8. Click **Save**.

Configuring Active Main or Sub Level Pricing for Current Round

When using the Change Price Level feature, you can also change the active main or sub level pricing for the current round (transaction) only. This allows the active menu (price) main or sub level to be maintained for the current round so that further menu items are priced at the same price level.

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab, and then select the following:
    - **71 - Change Price Main Level sets active Main Level**: Select this option to set the active Main Level for the current round after using Change Price Main Level.
    - **72 - Change Price Sub Level sets active Sub Level**: Select this option to set the active Sub Level for the current round after using Change Price Sub Level.
3. Click **Save**.

26

Sales Itemizers

Sales itemizers are used with PMS postings and other third-party interfaces. When the workstation operator adds items to a check, Simphony maintains various subtotals, known as itemizers, in the background. An itemizer is a bucket where totals accumulate. Simphony uses sales itemizers to separate menu item sales into categories such as food, beverage, and merchandise. You can configure up to 16 sales itemizers, which can output in the Summary Totals section of a guest check or customer receipt in lieu of the Subtotal.

Configuring Sales Itemizers

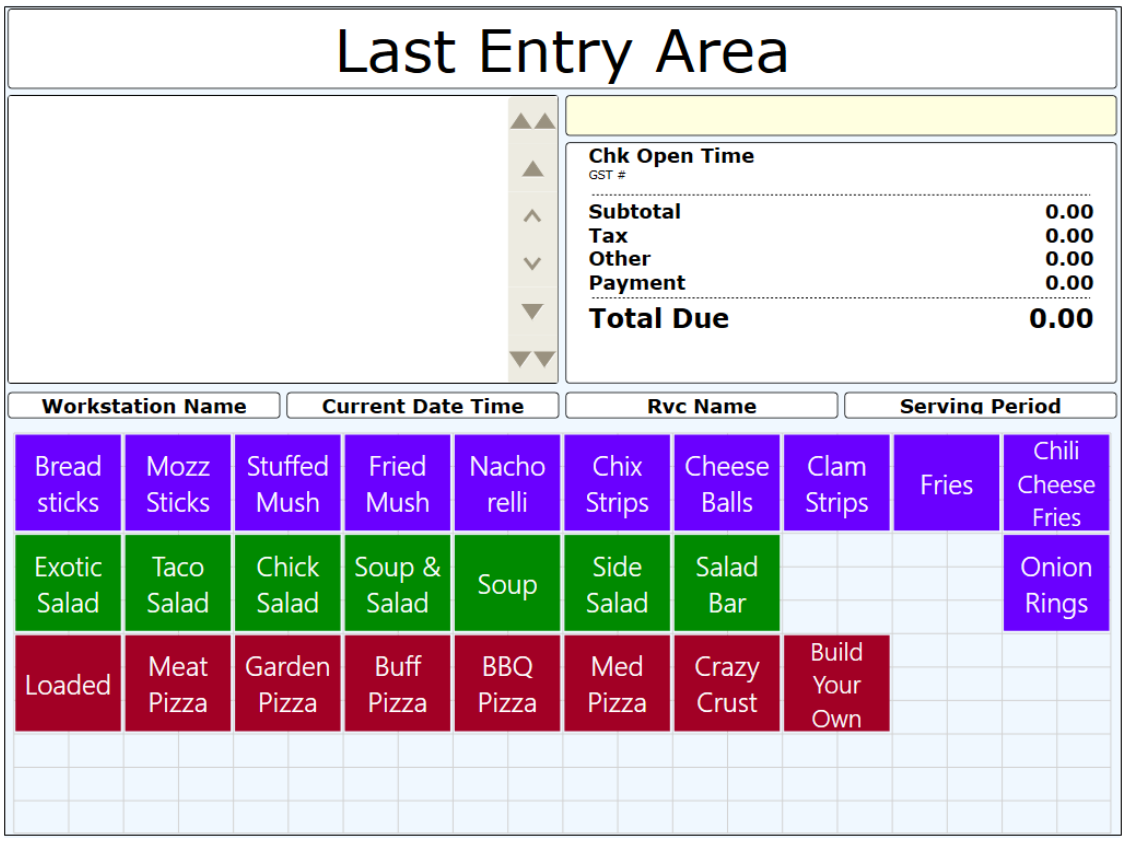
1. Select the Enterprise level, click **Descriptors**, and then click **Sales Itemizers**.
2. In the **Text** column, enter the names for each descriptor.
3. Click **Save**.

27
Screen Look Up (SLU)

A screen look up (SLU) is used to organize items, making it easier for workstation operators to find specific items on the workstation. A SLU is a system-generated screen that is created when a workstation operator selects a SLU button.

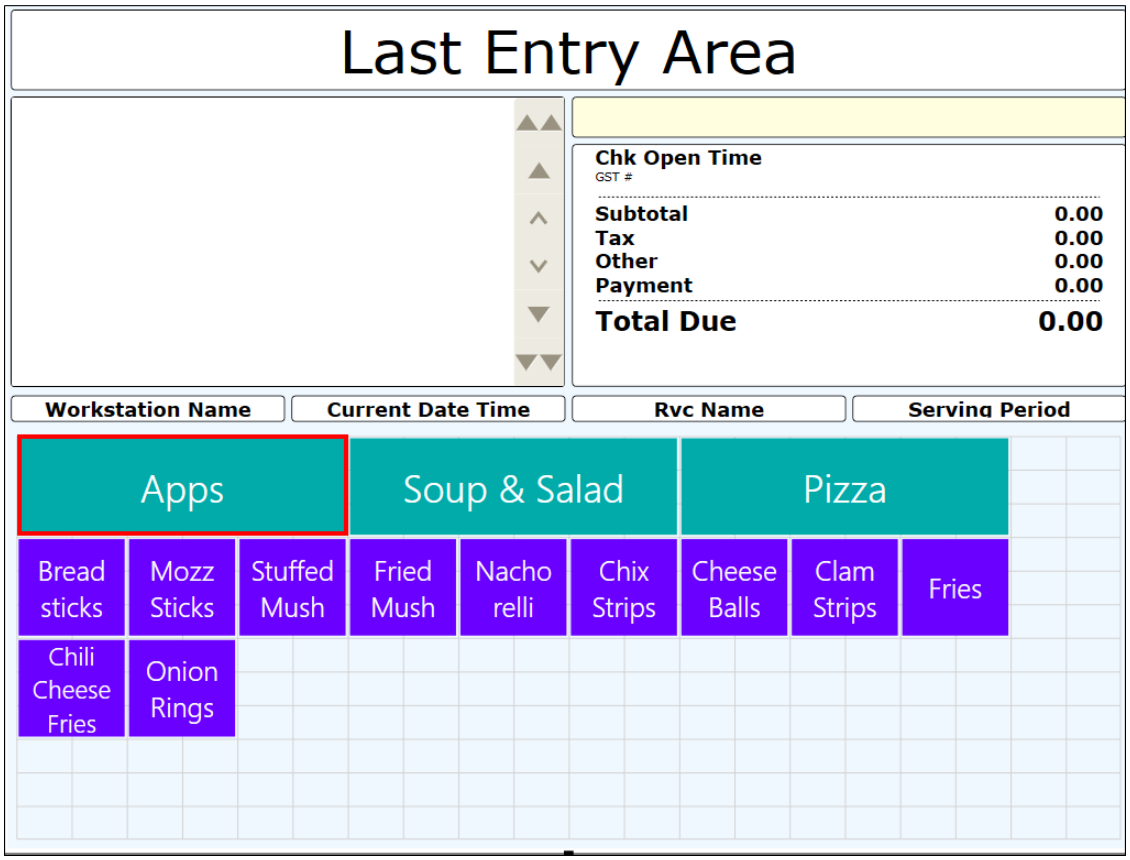
The following figure shows an example of a menu item touchscreen without SLUs.

Figure 27-1 Menu Item Touchscreen Without SLUs



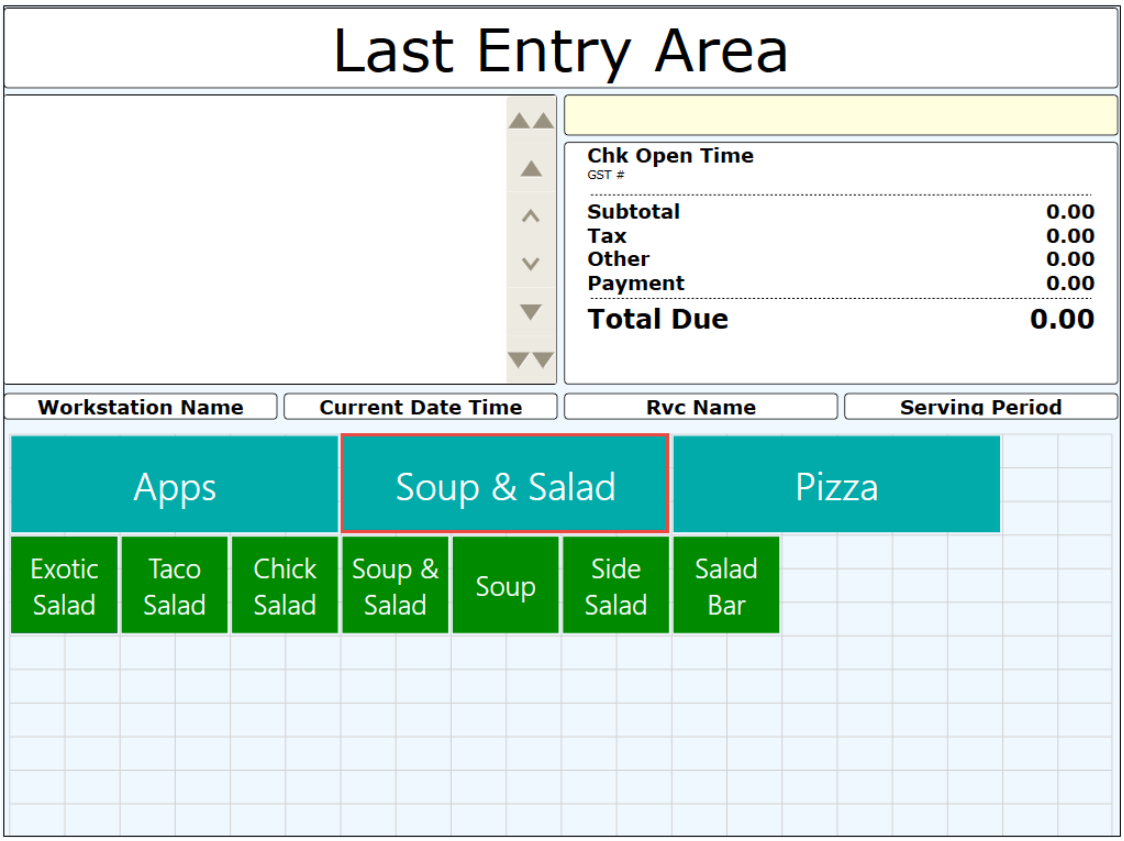
The next figure shows an example of a menu item touchscreen with SLUs. After selecting Apps, only the menu items associated with appetizers appear on the screen.

Figure 27-2 Menu Item Touchscreen With Appetizer SLUs



The third example shows a menu item touchscreen with Soup and Salad SLUs. After selecting Soup and Salad, only the menu items associated with soup or salad appear on the screen.

Figure 27-3 Menu Item Touchscreen With Soup and Salad SLUs



Typically menu item buttons are not added directly to a touchscreen, but instead menu items are usually linked to SLUs.

SLUs are efficient; after setup, there is no need to go to the Page Design module to link new items as all linking is done at the item level. SLUs also manage screen paging automatically; if the SLU items exceed the space allotted on a touchscreen display, up and down navigation keys automatically appear. You can define the sort method (alphabetical or by object number, or an optional sort priority can advance an item to the top of the list), background and font color, font size, and grid layout (number of columns and rows).

You can configure screen look ups for the following:

- Menu Items
- Discounts
- Service Charges
- Family Groups
- Major Groups
- Custom Reports
- Open Checks

Creating Screen Look Ups for Menu Items

You can assign each menu item definition to a maximum of eight different SLUs in table view of the Menu Item Maintenance module. Assigning multiple SLUs to a menu item allows flexibility in building POS client pages that are customized to use dine in, carry out, and curbside to go, and shows the menu items supported by the order type.

1. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click **Menu Item**.
2. Insert a new record, enter a name for the menu item screen look up (for example, `DinnerCarryOut`) in the **Record Name** field, and then click **OK**.
3. Repeat step 2 to add more SLUs, and then click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
5. To assign a SLU, click the ellipsis point (...) button adjacent to the menu item First Name, select the **SLU,** and then click **OK**.

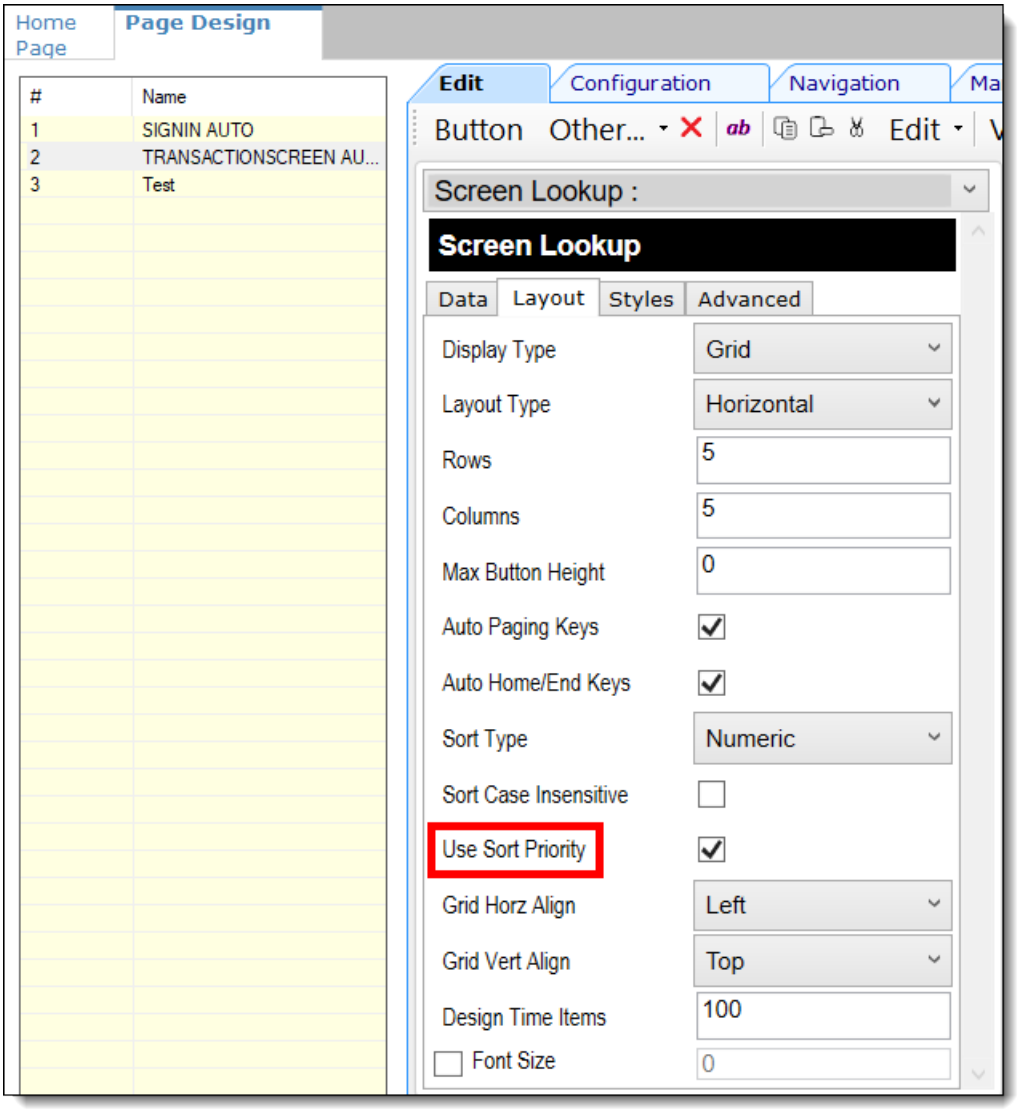
   To assign another SLU to the menu item, select the SLU from the **SLU 2** column. You can assign up to eight SLUs per menu item. Duplicate SLUs do not appear on the same workstation page.
6. (Optional) To assign a SLU sort priority:
   a. Double-click a menu item, and then click **General**.
   b. Select the relevant **SLU** from the Touchscreen Properties section.

      Use the **SLU 2**, **SLU 3**, and so on for multiple SLUs.
   c. Enter a **SLU Sort Priority** (between 1-99) for the menu item.

      Use this field when Page Design Layout option, **Use Sort Priority**, is enabled from the Screen Lookup settings.

      When **SLU Sort Priority** is used, menu items with Sort Priority 1 appear on the screen first, followed by menu items with Sort priority 2, and so on up to Sort Priority 99, and then finally Sort Priority 0 items. (Priority 0 means “Do not sort”; items with 0 appear at the end of the list.) Typically the most popular menu items have Sort Priority 1 for easy access. Items in the same SLU can belong to the same Sort Priority.

Figure 27-4 Page Design Screen Lookup (SLU) Layout Settings



7. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
8. Double-click the transaction page on which you want the screen look up to appear on the workstation.
9. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
10. Select **Menu Item** from the **Type** drop-down list, select **SLU** as the **Property**, and then select the menu item screen lookup as the **Value**.
11. Select the **Menu Item Display Name**, and then click **Save**.
12. If the revenue center uses hand held POS client devices:
    a. Select **Dynamic SLU** as the **Property**, and then select a menu item screen look up group as the **SLU Value**.
    b. Enter a non-zero value for the **Visual State(s)**.

       The application uses the Visual State value to link menu item screen look ups with their corresponding Visual State buttons, which workstation operators use to change the menu items that appear in the Dynamic SLU.

c. To add more screen look ups to the Dynamic SLU, click **Add**.

d. Select the **Menu Item Display Name**, and then click **Save**.

e. Insert buttons for each screen look up that you added to the Dynamic SLU.

   For example, if you added five screen look up groups to the Dynamic SLU, insert five buttons.

f. Select **Function** from the **Type** drop-down list, and then select **Visual State** from the **Function** list.

g. In the **Arguments** field, enter the **Visual State** value that you assigned to a screen look up group in Step 12-b.

h. Click **Save**.

Configuring Screen Look Ups for Discounts

1. Select the Enterprise, property, or zone, click **Descriptors**, and then click **Discount**.
2. Enter names for discount screen look up groups in the Text column, and then click **Save**.
3. Select the Enterprise property, or zone, click **Configuration**, and then click **Discounts**.
4. Double-click a record, and then click **NLU/SLU**.
5. Select the relevant **SLU** for the discount, and then click **Save**.
6. Repeat Steps 3 through 5 for all discounts to appear in screen lookups.
7. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
8. Double-click the transaction page on which you want the screen look up to appear on the workstation.
9. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
10. Select **Discount** from the **Type** drop-down list, and then select the discount screen lookup from the **Value** drop-down list.
11. Click **Save**.

Configuring Screen Look Ups for Service Charges

1. Select the Enterprise property, or zone, click **Descriptors**, and then click **Service Charge**.
2. Enter names for service charge screen look ups in the **Text** column.
3. Click **Save**.
4. Select the Enterprise property, or zone, click **Configuration**, and then click **Service Charges**.
5. Double-click a record, and then click **NLU/SLU**.
6. Select the relevant **SLU** for the service charge.
7. Click **Save**.
8. Repeat Steps 4 through 7 for all service charges to appear in screen lookups.
9. Select the Enterprise, property, revenue center, or zone, click **Configuration** and, and then click **Page Design**.

10. Double-click the transaction page on which you want the screen look up to appear on the workstation.
11. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
12. Select **Service Charge** from the **Type** drop-down list, and then select the service charge screen lookup as the **Value**.
13. Click **Save**.

Configuring Menu Item Screen Look Ups by Family Group

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the screen look up to appear on the workstation.
3. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
4. Select **Menu Item** from the **Type** drop-down list, select **Family Group** as the **Property**, and then select the family group to show in the screen look up as the **Value**.
5. Select the **Menu Item Display Name**.
6. Click **Save**.

Configuring Menu Item Screen Look Ups by Major Group

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the screen look up to appear on the workstation.
3. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
4. Select **Menu Item** from the **Type** drop-down list, select **Major Group** as the **Property**, and then select the major group to show in the screen look up as the **Value**.
5. Select the **Menu Item Display Name**.
6. Click **Save**.

Configuring Menu Item Screen Look Ups by Menu Item Master Group

You can assign a Menu Item Master Group to a SLU, which is applied to a workstation page. This feature is useful with conversational ordering as it enables easy addition to the page without hard coding individual menu items on the page. The system automatically generates the Master Group SLU button on the page.

1. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click **Menu Item Master Group SLU Names**.
2. Enter names for menu item master group screen look ups in the **Text** column.
3. Click **Save**.
4. Select the Enterprise, property, or zone, click **Configuration**, and then click **Menu Item Master Groups**.

5. Select the **SLU** assignment for each Menu Item Master Group.

   You can assign a maximum of 32 Menu Item Master Group SLUs.

6. Click **Save**.
7. Select the Enterprise, property, revenue center, or zone, click **Configuration** and, and then click **Page Design**.
8. Double-click the transaction page on which you want the screen look up to appear on the workstation.
9. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
10. Select **Master Group** from the **Type** drop-down list, select **SLU** as the **Property**, and then select the menu item master group to show in the screen look up as the **Value**.

    The **Value** drop-down list shows the menu item master group screen look up names that you created in Step 2.

11. Select the **Menu Item Display Name**.
12. Click **Save**.

Configuring Screen Look Ups for Custom Reports

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the screen look up to appear on the workstation.
3. Click **Other** in the Page Design toolbar, and then click **Sales SLU**.
4. Select **Custom Report** from the **Type** drop-down list.
5. Click **Save**.

Configuring Screen Look Ups for Open Checks

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the screen look up to appear on the workstation.
3. Click **Other** in the Page Design toolbar, and then click **Check SLU**.
4. In the **Show Checks For** drop-down list, select one of the following:
   - **All Employees**: Select this option to set the SLU to show open checks belonging to all employees.
   - **Currently Signed In Employee**: Select this option to set the SLU to show open checks belonging to only the employee who is signed in.
5. Select the type of open checks to appear on the SLU:

Table 27-1 Open Check Options

Open Check SLU Option	Description
All Checks	Select this option to show all open checks.

Table 27-1 (Cont.) Open Check Options

Open Check SLU Option	Description
Autofire Checks Only	Select this option to show only open checks that are configured to send to order devices at a preset time.
All Except Autofire Checks	Select this option to hide open checks that are configured to send to order devices at a preset time.
Checks with Held Items Only	Select this option to show only open checks with items on hold.
All Except Checks with Held Items	Select this option to hide checks with items on hold.
All Except Autofire and Checks with Held Items	Select this option to hide open checks with items on hold and checks that are configured to send to order devices at a preset time.
Autofire Checks with Held Items Only	Select this option to show only open checks that are configured to send to order devices at a predefined time and have items on hold.

6. In the **Sort Order** drop-down list, select the primary sort criteria for the SLU. Selecting a **Sort Order** option in the Page Design module simplifies SLU sorting configuration in the EMC.

Table 27-2 Open Check Sort Order Options

Open Check SLU Sort Order Option	Description
Check Open Time	Select this option to show open checks in the order in which they are created (opened) in the check SLU. The earliest time is shown first. This option is the default sort order.
Table Name	Select this option to sort open checks started with a table name or number in alphanumeric order in the check SLU. Checks without table names or numbers appear first before table name/number checks.
Service Total Time	Select this option to sort open checks in the order in which they are service totaled. The earliest service total time is shown first. This is useful for drive thru operations where checks are ordered in the same sequence as cars entering the drive thru. Workstation operators are able to pick up checks quickly and service guests efficiently with their drive thru orders.

Sort Order Overrides:

When options **65 - Sort Check SLU by Table Name** (in the RVC Parameters module) or **23 - Sort Check SLU by Table Name** (in the Employee Classes module or the Employee Maintenance module (Operator Records tab)) are enabled, these options override the check SLU **Sort Order** set here in the Page Design module (described in the preceding table). When options **65** or **23** are enabled, the Page Design setting is the secondary sort order when no table name/number is used.

Sort Order Exceptions:

- When **Table Name** sort order is enabled, checks using a Check Name (ID), where the name or ID is a customer reference, are shown first in the Check SLU in alphabetical order so they can be easily identified.
- Autofire (future) checks are listed at the end of the check SLU, irrespective of the sort order setting, and follow regular checks chronologically sorted by scheduled fire date/time.

7. To show only open checks that belong to specific order types (for example, Dine-in or Take Out), select one or more **Order Types**, and then click **Add**.
8. Click **Save**.

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Number Look Up (NLU)

A number look up (NLU) is a touchscreen button that allows workstation operators to access a numbered list of items. The workstation operator can select one of the following items or enter the relevant NLU number to apply the item to the transaction:

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

> **Note:**
>
> Payment tenders are not supported for use with NLUs.

To show an item in NLU, you must configure a valid NLU number greater than zero (0) for the item. You can intentionally assign duplicate NLU numbers. If this occurs, the workstation applies the lowest numbered record (by object number) to the check.

When showing discounts, service charges, and tender/media records, the workstation takes the active menu level of the transaction into consideration. For example, Chardonnay has 3 definitions used: 4-ounce pour (small), 6-ounce pour (medium), and carafe (large). All three definitions are configured with NLU 23. The workstation operator selects the Small, Medium, or Large Menu Level and the 23 menu item NLU to get the desired Chardonnay.

Configuring Number Look Ups for Discounts

1. Select the Enterprise or property, click **Configuration**, and then click **Discounts**.
2. Double-click a record, and then click **NLU/SLU**.
3. Enter a unique **NLU** number for the discount.

   You can enter a value between 1 and 255.
4. Click **Save**.
5. Repeat Steps 2 through 4 for all discounts to appear in the number look up.
6. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
7. Double-click the transaction page on which you want the number look up to appear on the workstation.
8. Insert a new button, select **Function** from the **Type** drop-down list, select **Discount NLU** from the **Function** list, and then click **OK**.
9. Click **Save**.

Configuring Number Look Ups for Service Charges

1. Select the Enterprise or property, click **Configuration**, and then click **Service Charges**.
2. Double-click a record, and then click **NLU/SLU**.
3. Enter a unique **NLU** number for the service charge.

   You can enter a value between 1 and 255.
4. Click **Save**.
5. Repeat Steps 2 through 4 for all service charges to appear in the number look up.
6. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
7. Double-click the transaction page on which you want the number look up to appear on the workstation.
8. Insert a new button, select **Function** from the **Type** drop-down list, select **Service Charge NLU** from the **Function** list, and then click **OK**.
9. Click **Save**.

Configuring Number Look Ups for Tender/Media Records

Simphony does not support the use of payment tenders through a NLU in POS Operations. If a workstation operator attempts to use the Tender/Media NLU function key as a payment tender with a NLU value set, a “Tender/Media not found” error appears in POS Operations. Workstation operators can use the same payment tender without error if it is configured as an individual payment tender button via the Page Design module; administrators must assign a special type of payment button in the Page Design module in order to configure the payment configuration arguments.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Double-click a record.
3. Enter a unique **NLU** number for the tender/media record.

   You can enter a value between 1 and 255.
4. Click **Save**.
5. Repeat Steps 2 through 4 for all tender/media records to appear in the number look up.
6. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
7. Double-click the transaction page on which you want the number look up to appear on the workstation.
8. Insert a new button, select **Function** from the **Type** drop-down list, select **Tender/Media NLU** from the **Function** list, and then click **OK**.
9. Click **Save**.

Configuring Number Look Ups for Main and Sub Levels

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Double-click the transaction page on which you want the number look up to appear on the workstation.
3. Insert a new button, select **Function** from the **Type** drop-down list, select either **Main Level NLU** or **Sub Level NLU** from the **Function** list, and then click **OK**.
4. Click **Save**.

Configuring Number Lookups for Menu Items

You can create NLUs for retail menu items (for example, bottled wine, t-shirts, and hats).

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Double-click a menu item, and then click the **General** tab.
3. Select the relevant **NLU Group** from the Number Lookup Properties section.
4. Enter a unique **NLU Number** for the menu item. Up to 12 digits are allowed
5. Click **Save**.
6. Repeat Steps 2 through 5 for all menu items to appear in the number look up.
7. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
8. Double-click the transaction page on which you want the number look up to appear on the workstation.
9. Insert a new button, select **Function** from the **Type** drop-down list, select **Menu Item NLU** from the **Function** list, and then click **OK**.
10. Click **Save**.

Configuring NLU Groups

An NLU Group contains menu items that workstation operators can scan with a barcode scanner to look up items.

1. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click **NLU Names**.
2. In the **Text** field, enter the NLU Group name (for example, Barcode Items).

   You can configure up to 32 NLU Groups.
3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
5. Select a menu item record (for example, potato chips).
6. Select the **NLU Group** to associate with the menu item.
7. Enter the NLU number or barcode value in the **NLU Number** field.
8. Repeat Steps 5 through 7 for each menu item that associates with an NLU Group.
9. Click **Save**.

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Weighed Menu Items

A weighed menu item is measured in ounces, pounds, or kilograms and is priced per unit of measurement (for example, lobster is sold by the pound). You can measure the weight manually or automatically. The workstation calculates the price regardless of the weight entry method.

- Manual: The workstation operator is prompted to enter the weight of the item if the scale is not connected.
- Automatic: A scale attached to a workstation can automatically calculate the weight of the item.

Tare weight is the weight of a container or wrapper that is deducted from the gross weight to obtain the net weight. For example, in a restaurant with a salad bar where salad is sold by weight, the customer should not be charged for the weight of the container. To prevent this, a tare weight is configured for the salad menu item, and the weight of the salad's container is automatically subtracted from the weight of the salad.

The weight and tare weight (if set) appear for a weighed menu item on guest checks and customer receipts. The weight formatting meets the United States Department of Agriculture Weights and Measures requirements for scale certification. The weight is determined by the Unit of Measure (UOM) as follows:

- Kilograms: 0.000
- Pounds: 0.00
- Ounces: 0.0

The UOM must match in the Enterprise Management Console (EMC) configuration and on the scale setting. For example, the scale must measure in ounces and EMC must be set to use ounces.

Configuring a Weighed Menu Item

There are two methods of configuring a weighed menu item. You can use one of the following:

1. Assign the menu item to a menu item class that has option **15 - Weighed Items** set.
2. Configure a Tare Weight for the menu item definition. See Setting the Tare Weight for a Menu Item for more information.

Setting the Tare Weight for a Menu Item

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click **Search** to show all menu items, and then double-click a menu item master record.
3. Click the **Definition Records** tab in the lower area of the screen.
4. In the **Tare Weight** field, enter the weight of the empty package for an item that is sold by weight (for example, the weight of the salad container at a salad bar, where salad is sold by weight).

The **Tare Weight** should not be more accurate than your scale can measure so that the application does not round. For kilograms this is to the thousandth 0.000, for pounds the hundredth 0.00, and for ounces the tenth 0.0.

5. Click **Save**.
6. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
7. Click the **Options** tab, and then select **13 - Convert Weight to System Unit of Measure**.

   You must set this option in the United States to comply with the Department of Agriculture Weights and Measure requirements. Setting this option allows the POS client to convert the item weight to the property's UOM if the UOM received from a scale does not correspond to the UOM set from the Property Parameters module.
8. Click **Save**.

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Menu Item Waste

Menu Item Waste describes menu items that are not sold to customers due to reasons such as spillage, spoilage and quality standards. Menu Item Waste also includes menu items that are donated (for example, to soup kitchens, employee parties, or used for photo shoots). There are three main characteristics of a menu item waste check:

- Does not post to sales
- Deplete inventory
- Service Total and Print functions close a waste check

When menu item waste occurs, authorized workstation operators can begin a menu item waste check and then enter menu items to waste or donate. Managers can generate waste reports by revenue center, menu item, employee, and waste reason. Depending on the reasons for waste, managers can take action to reduce inventory loss. You can differentiate waste checks from other checks in the Employee Journal Report and the Check Journal Report by the Waste Check banner on the check header.

The following table lists the functional differences between menu item waste checks and guest checks.

Table 30-1 Differences Between Waste Checks and Guest Checks

Function	Menu Item Waste Checks	Guest Checks
Kitchen Display Systems (KDS) or screen lookups display the check	No	Yes
Reopen a closed check	No	Yes
Apply discounts	No	Yes
Apply taxes	No	Yes
Apply service charges	No	Yes
Apply guest count	No	Yes
Return item	No	Yes
Edit seat	No	Yes
Split check	No	Yes
Gift card or credit card operations	No	Yes
Send and Stay	No	Yes
Hold and Fire	No	Yes
Transaction void	No	Yes
Transaction return	No	Yes
Menu item availability	No	Yes

Complete the following tasks to configure the Menu Item Waste feature:

- Configure employee privileges to begin waste checks and run waste check reports

- Define reasons for menu items declared as waste
- Configure waste receipt headers and trailers
- (Optional) Hide price details on waste checks
- Add a Declare Waste button to the touchscreen page

Allowing Employees to Begin Waste Checks and Run Waste Reports

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, and then click the **Operations** tab.
3. To allow employees associated with this role to begin waste checks and to authorize other employees to begin waste checks, select **263 - Authorize/Begin Menu Item Waste Check**.
4. Select the appropriate report privileges as described in the following table:

Table 30-2 Menu Item Waste Report Privileges

Privilege Name	Allows the Employee to ...
31062 - Run Employee Waste Report	Run the Employee Waste Report from the workstation.
31063 - Run Menu Item Waste Report	Run the Menu Item Waste Report from the workstation.
31064 - Run Waste Summary Report	Run the Waste Summary Report from the workstation.
31065 - Run Waste Detail Report	Run the Waste Detail Report from the workstation.

5. Click **Save**.

Configuring Waste Reasons

1. Select the Enterprise level, click **Descriptors**, and then click **Void/Return/Waste Reasons**.
2. To add a new waste reason, enter a waste reason in an empty row of the Text column, and then select **2 - Use for Waste** in the Options column.
3. To use an existing void or return reason as a waste reason, select **2 - Use for Waste** in the Options column adjacent to the void or return reason.

   The options work independently of each other; you can set one, both, or none.
4. Click **Save**.

Configuring Waste Receipt Headers and Trailers

When you post a waste check, the guest check printer assigned to the workstation prints a waste receipt.

1. Select the Enterprise level, and then click **Descriptors**.

2. Select one of the following options, depending on whether you want to configure receipt headers or trailers:
   - **Waste Receipt Headers**
   - **Waste Receipt Trailers**
3. Perform one of the following actions:
   - Enter text for the header or trailer in the rows of the Text column.
   - Select a check box in the **Use Logo** column, and then select a logo using the ellipsis point (...) button in the **Logo** column.
4. Click **Save**.

Hiding Price Details on Waste Checks

A waste check measures the cost of wasted inventory as opposed to a guest check that posts the prices of menu items to the sales totals.

Complete these steps if you do not want to show prices of waste menu items in the check detail area of the workstation screen or print prices on waste receipts.

1. Select the Enterprise level, click **Setup**, and then click **Format Parameters**.
2. Click the **Options** tab, and then select **56 - Do not display/print price for Waste**.
3. Click **Save**.

Creating the Declare Waste Button

To declare waste, you need to add the **Declare Waste** function key to a page.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the Front of House page on which to place the **Declare Waste** button.
3. On the **Edit** tab, select the page area in which to define the **Declare Waste** button.
4. Click **Button** to add a button.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, and then select **Declare Waste**.
8. Highlight the **Declare Waste** button.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

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Menu Item Refills

Refills is a function that provides workstation operators the ability to reorder menu items from the previous round of a check to the current round, free of charge. It is ideal for occasions such as an all-you-can-eat buffet where customers can reorder menu items for free until the refill limit of the menu item is reached.

When a menu item with a condiment is refilled, the condiment retains its cost for the restaurant, while the sales price of the parent menu item shows a zero amount.

To control costs, only one refill is enabld for each parent menu item per service round.

Allowing Employees to Refill Menu Items

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type record (for example, administrator, manager or server).
3. Click the **Operations** tab, click the **Transactions** subtab, and then select **186 - Perform Menu Item Refills**.
4. Click **Save**.

Making Menu Items Refillable and Configuring the Refill Limit

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a menu item class to open it.
3. Click the **Options** tab, and then select **72 - Enable Refill**.
4. Click the **General** tab, and then enter maximum number of refills customers can order in the **Maximum Refill Count** field. The maximum refill count is 99.
5. Enter a label (for example, `Refill`) to identify refill items on printed order chits in the **Refill Descriptor** field. Up to 12 characters are allowed.
6. Click **Save**.
7. Repeat Steps 2 through 6 for all menu item classes that are refillable.

Adding Refill Buttons

In order for workstation operators to initiate refills for customers, you must configure touchscreen buttons for the refill function. There are two types of refill functions.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the refill buttons.
3. On the **Edit** tab, select the page area in which to define the buttons.

4. Click **Button**, and then on the General subtab, select **Function** from the **Type** drop-down list.
5. Click the black arrow directly beneath the **Type** drop-down list, and then select **Transaction** from the **Type** pane.
6. Select one of the following function keys, and then click **OK**:
   - **Refill Auto**: Shows a list of refillable items on the check for selection.
   - **Refill Interactive**: Refills only the parent menu item and allows the workstation operator to select required and allowed condiments as necessary. Only one menu item is refillable at a time using this function.
7. Enter a **Legend** for the button (for example, `Refill`), and then position and size the button on the page.
8. Repeat Steps 4 through 7 and create a button for the remaining Refill function.
9. Click **Save**.

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Condiments

Condiments typically provide details to the cook preparing the menu item, such as a rare steak and salad dressing. Other examples of condiments include tomatoes, onions, and pickles. In Simphony, enhanced condiment prefixes include the words extra, add, substitute, and without.

Setting up condiments consists of completing the tasks listed in the following table:

Table 32-1 Condiment Configuration Tasks

Task	More Information
Create condiment groups	Configuring Condiment Groups
Create menu item classes for the condiment groups	Creating Menu Item Classes for Condiment Groups
Create menu item master records for condiments and assign to condiment classes	Creating Menu Item Master Records for Condiments
Create condiment sets and assign condiments	Configuring Condiment Sets
Assign condiments to parent menu item classes	Assigning Condiments to Parent Menu Item Classes
Assign default condiments to parent menu items	Assigning Default Condiments to Parent Menu Items
Create condiment prefixes	Configuring Condiment Prefixes
Configure additional settings for condiment appearance on workstations, guest checks, and customer receipts	Setting Condiment Appearance

Condiment Groups and Condiment Sets

A condiment set defines the condiments that accompany the parent menu item. For example, a condiment set for a bacon cheeseburger includes the following condiments:

- Bacon
- Cheddar Cheese
- Mayonnaise
- Lettuce
- Ketchup

A condiment group defines the category to which a condiment set belongs and dictates its behavior.

Configuring Condiment Groups

1. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click **Condiment Group Names**.

2. Enter condiment group names (for example, Meat Group or Cheese Group) in the **Text** field.
3. Click **Save**.

Creating Menu Item Classes for Condiment Groups

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**
2. Insert a new record, enter the class name, and double-click the new record.
3. On the **General** tab, select the **Condiment Order Type** from the drop-down list.

   This setting describes how the condiment is added to a check when it is ordered:

   - **0 - Add**: Select to create a new item on the check even if it already exists for that parent.
   - **1 - Increment**: Select to add the item if it does not exist for the parent or increments an existing one.
   - **2 - Replace In Condiment Group**: Select to remove any items that exist in the item's member condiment group before adding it (this simulates a radio button effect).
   - **3 - Replace In Master Group**: Select to remove any items that exist in the item's master group are before adding it.
   - **4 - Toggle**: Select to toggle the item on and off.
4. Click the **Options** tab, and then select **2 - ON = Condiment Menu Items; OFF = Regular Menu Items**.

   When you select this option, Simphony updates the Type column in table view to Condiment for this menu item class. For a menu item to be a condiment, it must belong to a class where at least one Member Condiment Group is enabled.
5. To set no charge for the condiments in this class, select **8 - Allow Menu Items in this Class to be Non-Priced**.

   To prevent a condiment from printing on the guest check and customer receipt if it does not have an associated price, see Configuring Menu Item Classes, specifically option **79 - Do not print unpriced condiments on Guest Checks**.
6. To set each condiment in this class to print to a specific order device, select **22 - ON = Use Own Output Link; OFF = Use Parent's (Condiments Only)**.

   By default, the ideal setup of a condiment group class is to keep this option deselected and to select all order devices as the output. This ensures that the condiment always follows the parent item to its order devices. This option does not apply to Condiment Prefixes.
7. To override order device programming of the parent menu item, select **58 - Condiment order device programming overrides that of parent**.

   When this option is selected, order devices configured for the condiments class override the order devices defined for parent menu items. Use this option in a situation where a menu item is sent to a different order device when a specific condiment is added. For example, a Muffin served at room temperature outputs to the Pantry Order Device. Warm is set to output to the Hot Order Device. When the Condiment Warm with this option set is added to the Menu Item Muffin, the Muffin will use the Order Device output of the Warm Condiment and go to the Hot Order Device instead of the usual Pantry. This option does not function if the menu item is a Condiment Prefix.

8. Click the **Condiment Groups** tab, and then select the **Member Condiment Groups** for the class.

   For example, if the condiment class is Deli Meat Class, select Meat Group from the Member Condiment Groups list.

9. Click **Save**.

10. Repeat Steps 2 through 9 to create menu item classes for all condiment groups.

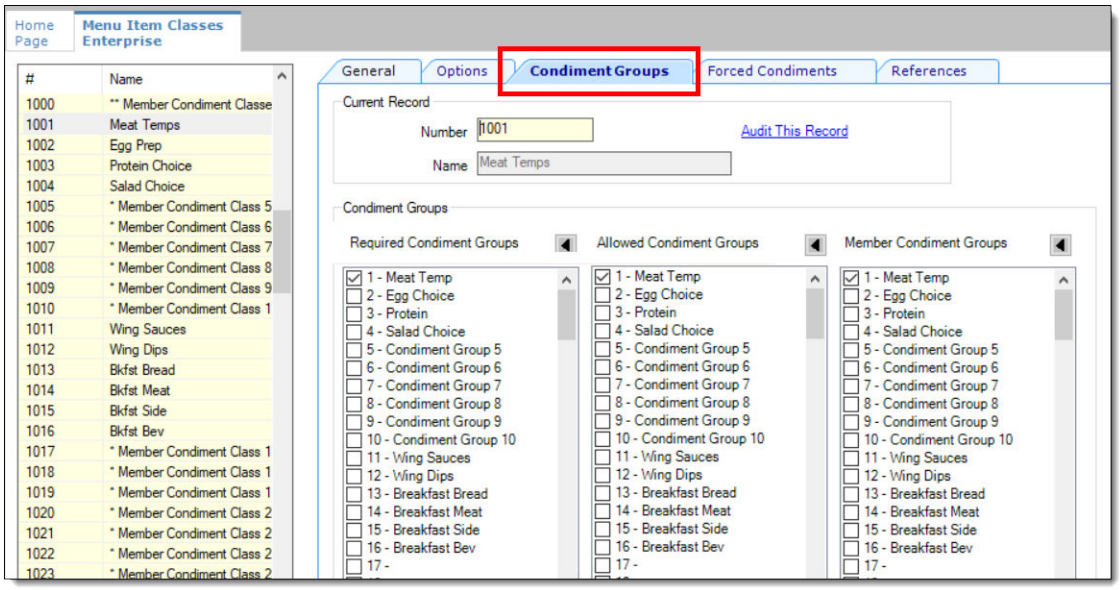
Suppressing Condiment Groups on a Condiment Orderer Page

There are times when you do not want to show a condiment group on the Condiment Orderer page because there are no valid condiments in the group of the current ordering context. You can specify one or more condiment groups to suppress from view.

You can assign condiment menu item classes to condiment groups in the Menu Item Classes module.

> **Note:**
>
> The Condiment Orderer hides selected condiment groups regardless of whether they are required or allowed. Hiding required condiment groups could lead to ordering issues on the POS workstation.

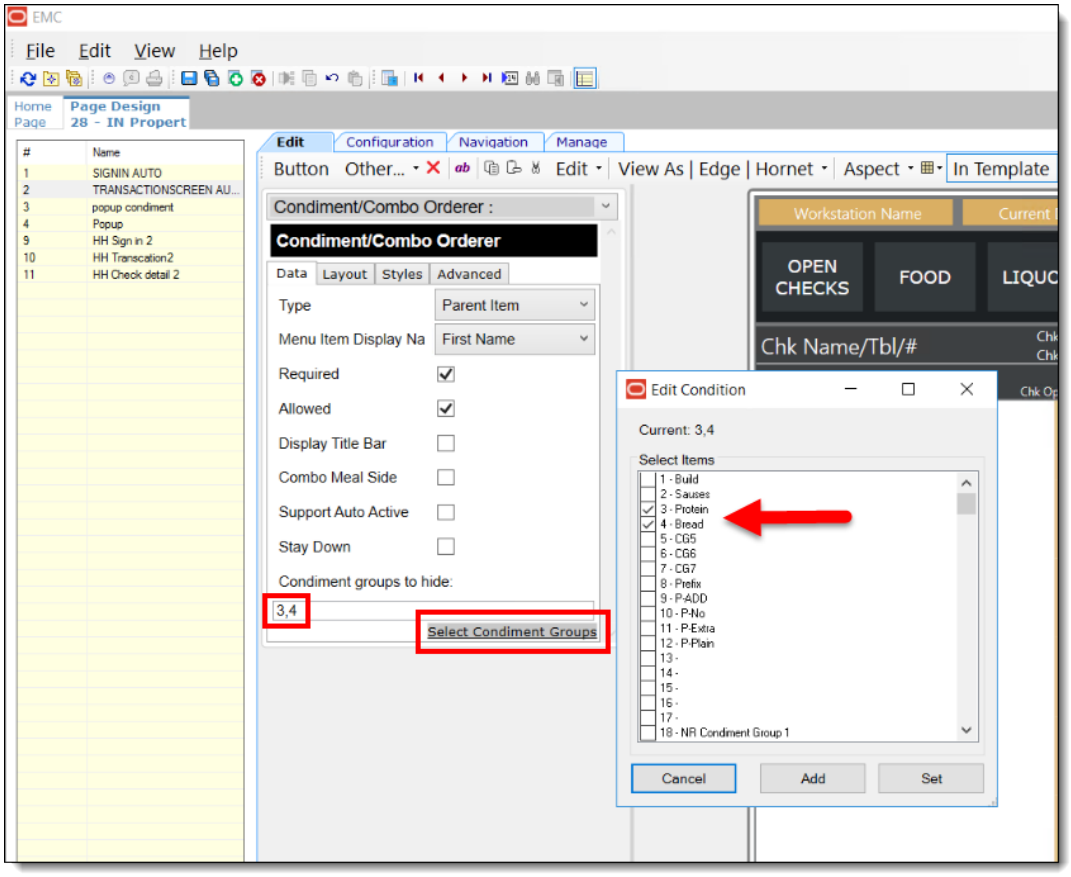
Figure 32-1 Menu Item Classes - Condiment Groups Column



1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Insert a new page record or select an existing page, and then select **Condiment/Combo Orderer**.

Figure 32-2 Page Design - Condiment/Combo Orderer



3. Click the **Select Condiment Groups** link, select the condiment groups to hide, and then click **Set**.
4. Click **Save**.

   Once condiment groups have been selected to be hidden, the object numbers of the condiment groups show within the **Condiment groups to hide:** field (comma separated). Users cannot manually edit this field.

Creating Menu Item Master Records for Condiments

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Insert a new record, and then enter the condiment name (for example, Ham).
3. Search for and then double-click the new record
4. Insert a definition record, and then click the **General** subtab.
5. From the Name and Class section, select the **Menu Item Class** for the condiment.
6. To set a priced condiment:
   a. Click the **Prices** subtab, insert a price definition, and then enter the **Price** for the condiment.
   b. To set the price to become active at a specific menu level, select **Active On Level**, and then select the level.

7. Click **Save**.
8. Repeat Steps 2 through 6 to create menu item master records for all condiments.

Configuring Condiment Sets

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Condiment Sets**.
2. Insert a new record, enter a name for the condiment group, and then double-click the new record.
3. Click **Add** from the Condiments section.
4. From the Menu Item column, click the ellipsis point (...) button, select a condiment from the list, and then click **OK**.
5. Enter the number of condiments that accompany the condiment group in the **Default Count** field.

   For example, if the condiment is a slice of cheddar cheese and you enter number 2 as the default count, 2 slices of cheddar cheese accompany the condiment.
6. In the **Sort Order** field, enter the order in which the workstation shows the condiment on screen.
7. If you want the condiment to remain in the order when the workstation operator changes a menu item to plain (for example, when a workstation operator changes the order to a plain bacon cheeseburger, the bacon and the cheese are not removed), click the ellipsis point (...) button from the **Options** column, select **1 - Persist On Plain**, and then click **OK**.
8. Enter the **Menu Item Definition Sequence** number that coincides with this condiment.

   The Menu Item Definition Sequence number helps workstation operators switch between condiments. For example, the cheeseburger has two menu item definitions. If the customer orders definition 1, the cheeseburger should have cheddar cheese and if the customer orders definition 2, the cheeseburger should have mozzarella cheese. When configuring the condiment group for the cheeseburger, you must enter 1 as the Menu Item Definition Sequence for the condiment cheddar cheese and 2 as the Menu Item Definition Sequence for the condiment mozzarella cheese.
9. Repeat Steps 3 through 8 to add more condiments to the condiment group.
10. Click **Save**.

Assigning Condiments to Parent Menu Item Classes

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a parent menu item class.
3. Click the **Condiment Groups** tab, and then select the appropriate **Required Condiment Groups** and **Allowed Condiment Groups** for the class.

   For example, if the parent menu item class is Sandwich Class, the required and allowed condiment groups are listed in the following table:

Table 32-2 Examples of Required and Allowed Condiment Groups

Condiment Group	Examples
Required Condiment	Meat Group, Bread Group Each Required Condiment Group that you select appears on the Forced Condiments tab. From there you can enter the **Minimum** and **Maximum** amounts for each item.
Allowed Condiment	Meat Group, Bread Group, Cheese Group, Sauce Group, and Veggie Group

4. (Optional) Click the **Forced Condiments** tab.
5. For each required condiment group, enter the **Minimum** and **Maximum** condiment count required to complete the order.

   For example, if you set the minimum condiment count for Veggie Group as 2, the workstation operator must add two types of vegetables to complete the order.
6. To limit the number of selections that workstation operators can add from a condiment group at a certain menu level, enter the **Threshold 1** and **Threshold 2** for each required condiment group.

   - To configure the menu levels that are used for the condiment price, enter numerical values in the **Threshold 1 Level** and **Threshold 2 Level** fields corresponding to the price sequence record in the Menu Item Maintenance module for each menu level. For example, if you enter **2** and **3** in **Threshold 1 and 2 Levels**, Menu Item Maintenance price sequences 2 and 3 are used for condiment pricing when **Threshold 1** and **Threshold 2** quantities are exceeded.

   Threshold configuration is supported with option **65 - Support Enhanced Prefix Mode (Parent Only)** in the Menu Item Classes module. The **Threshold 1 Level** and **Threshold 2 Level** pricing is recalculated based on the value selected in the **Condiment Handling with Parent Item Switching** drop-down list (located in the Menu Item Classes module on the General tab): option **1 - Reset Default Condiments Only** or **2 - Reset All Condiments**. On the Menu Item Classes module Forced Condiments tab, do not enter zero in the **Threshold 1 Level** and **Threshold 2 Level** fields for Condiment Groups when **Threshold 1** and **Threshold 2** quantities are used.

   See Using Condiment Prefixes with Menu Item Classes and Configuring Menu Item Classes for more information about option **65** and enhanced prefix support.
7. Click the **Options** tab, and then select the appropriate options as described in the following table:

Table 32-3 Condiment Menu Item Class Options

Option	Description
9 - Condiment Changes Print Group of Parent Menu Item	Select this option to have the menu items in this class use the print group of the condiment. This is used to modify the parent menu item's Order Device Sorting. For example, you can use the condiment As Entree to modify an appetizer, forcing it to print and sort with other entrée menu items. If a parent menu item has several condiments with this option set, the last condiment for which this option is enabled determines the parent's print group. The menu item cannot be a Condiment Prefix.
21 - Require Number of Condiments to Match Number of Parent Items	Select this option to match the number of the required condiments belonging to the menu item class to the number of parent menu items ordered. For example, if selected, when a workstation operator orders 3 Steak Dinner, the operator is prompted for the Meat Temperature condiment group three times. If this option is deselected and a workstation operator orders 3 Steak Dinner, the operator is prompted for the Meat Temperature condiment only once, and the cook assumes that all three steaks are to be prepared at the same temperature. **Note:** The system ignores this option when orders are submitted through Simphony Transaction Services Gen 2.
23 - Add Condiment Price to the Parent Item's Price on Check Only	Select this option to have guest checks and customer receipts show the price of condiment added to the price of the menu item it is modifying. For example, a Salad is $5.00, and Blue Cheese dressing is $0.25. With option **23** set, the guest check and receipt show the price as $5.25. This option does not apply to Condiments Prefixes.

Table 32-3 (Cont.) Condiment Menu Item Class Options

Option	Description
30 - Sort Condiments by Print Group	Select this option to sort condiments according to their print group. Deselect to print condiments in the order in which they were ordered. For example, Prime Rib requires three condiments: meat temperature, potato type, and salad dressing. In addition to these required condiments, which must be entered first, other condiments such as End Cut are ordered for this item. By configuring menu item class print groups to anticipate this situation, the meat temperature items are assigned to Print Group 1, the potato type and salad dressing items are assigned to Print Group 4, and the End Cut item is assigned to Print Group 2. When the item is added, the cook sees the condiments print in this order: meat temperature, End Cut, potato type, and then salad dressing. Therefore, Simphony sorted the End Cut item immediately after the meat temperature, making the order receipt more logical to read. This option does not apply to Condiment Prefixes.
41 - Consolidate Menu Items with Condiments on Order Output	Select this option to have order devices consolidate items with condiments and print each condiment with the seat number to which the condiment applies. You must also select **6 - Print Seat Numbers with Individual Items** from the Order Devices module at the revenue center level.
42 - Consolidate Parents with Matching Condiments on Order Output	Select this option to have order devices consolidate parent menu items with identical condiments.
54 - Condiment entry/display relational to Parent Item's quantity	Select to show the number of condiments for each parent menu item. Deselect to add each condiment individually or by quantity without relation to the parent item's quantity. Use this option based on the ordering process and flow of operations. For example, if set and there are 3 Burgers, when a workstation operator enters 2 Cheese, each Burger will get 2 cheese for a total of 6 Cheese. Because the condiments are relational to the parent item's quantity, it only shows how many Cheese each Burger will get—in this example 2 for each Burger. If deselected, to order 2 Cheese for each Burger, workstation operators must enter 6 Cheese.

8. Click **Save**.
9. Repeat Steps 2 through 8 for all parent menu item classes.

Assigning Default Condiments to Parent Menu Items

Default condiments are used for the following purposes:

1. The default building of a menu item (for example, a hamburger comes with tomato, onion, and pickle)
2. Breaking down a menu item to the ingredient level for inventory system integration (for example, the default number of pickles that accompany a hamburger)

Default condiments are not supported with Transaction Services. If you are using Transaction Services, workstation operators need to add default condiments separately.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
2. Search for and double-click a parent menu item record.
3. Click the **Default Condiments** subtab, and then click **Add**.
4. Click the ellipsis point (...) button from the **Condiment Set** column, select the condiment set, and then click **OK**.
5. (Optional) Enter the sort group number for the condiment set in the **Sort Group** column.

   All condiment sets appear in the workstation according to the Sort Group. Condiment sets in Sort Group 0 appear first, followed by 1, 2, and so on. Items that have the same Sort Group number appear as they are listed in the EMC.
6. To show the default condiments, click the ellipsis point (...) button from the **Options** column, and then select **1 - Display when in default state**.
7. To always charge guests for the condiment count, select **2 - Charge for entire sales count**, and then click **OK**.

   For example, if a burger comes with 2 slices of cheese by default, the guest is charged regardless of whether they order 1 or 2 slices of cheese on the burger. If you do not select this option, guests are only charged when the condiment count exceeds the default count.
8. Click **Save**.

Condiment Prefixes

Many restaurants allow workstation operators to modify menu items, such as adding, removing, increasing and decreasing the number of condiments on the item. Workstation operators can add prefixes (for example, No, Add, Extra) before the condiment on the guest check, order devices, and customer receipts. This provides helpful preparation instructions to the kitchen staff and eliminates order confusion.

Condiment prefixes follow the same print class settings configured for the condiment to which they are associated.

Complete the following tasks to set up condiment prefixes:

- Create condiment prefix menu items
- Create menu item classes for the prefixes
- Activate and deactivate condiment prefixes
- Configure separate touchscreen buttons for condiment prefixes

Creating Condiment Prefix Menu Items

1. Select the Enterprise, click **Configuration**, and then click **Menu Item Maintenance**.
2. Insert a new record and name it Prefixes.
3. Select the Prefixes header record and insert a new record. Enter the prefix (for example, ADD) as the name for the new menu item record.
4. Double-click the record you created in Step 3, and then click **Menu Levels Tab**.
5. Select **Active on All Levels**.
6. Click **Prices** and insert a $0 priced record.
7. Click **Save**.
8. Repeat Steps 3 through 7 to create records for the remaining prefixes.

Creating Menu Item Classes for Prefixes

1. Select the Enterprise level, click **Descriptors**, and then click **Condiment Group Names**.
2. In the **Text** field, enter a group name to appear in the POS client for the condiment prefixes.
3. Click **Save**.
4. Select the Enterprise level, click **Configuration**, and then click **Menu Item Classes**.
5. Insert a new record and name it after a prefix (for example, Add).
6. Double-click the new record.
7. On the **General** tab, select the **Condiment Prefix Type** that corresponds to the prefix menu item class that you created in Step 5:
   - **1 - Description Prefix**: Indicates that the prefix describes the condiment it modifies more clearly (for example, Lite Mayo).
   - **2 - No Prefix**: Indicates the removal of the default condiment (for example, No Cheddar).
   - **3 - Add Prefix**: Indicates the addition of a non-default condiment (for example, Add American).
   - **4 - Sub Prefix**: Identifies the item as replacing a default condiment with a similar condiment (for example, No American, Sub Cheddar).
   - **5 - Plain Prefix**: Works like a function key. When selected, all condiments are removed from the check detail. If an item is re-added after being set to Plain, the workstation shows the items in the check detail, including default items that are placed back on the menu item. Switching the Plain key is the same as selecting the Reset key.
   - **6 - Reset Prefix**: Resets the menu item to its original ordered state with no non-default condiments ordered and all of the default condiments automatically ordered.
8. Click the **Options** tab, and then select **2 - ON = Condiment Menu Items; OFF = Regular Menu Items** and **8 - Allow Menu Items in this Class to be Non-Priced**.
9. Click the **Condiments Group** tab.
10. From the Member Condiment Groups section, select the condiment group that you created in Step 2.

11. Click **Save**.
12. Repeat Steps 5 through 11 to configure menu item classes for the remaining prefixes.

Using Condiment Prefixes with Menu Item Classes

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Click the **Options** tab.
3. For all regular menu item classes, select **65 - Support Enhanced Prefix Mode (Parent Only)**, and then click **OK**.

   If you are not using condiment prefixes, do not select **65 - Support Enhanced Prefix Mode (Parent Only)**.

   See Configuring Menu Item Classes and Assigning Condiments to Parent Menu Item Classes for more information.
4. Click **Save**.

Disabling Condiment Prefixes

You can disable condiment prefixes to prevent them from appearing in the Combo/Condiment Orderer.

1. Select the Enterprise level, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click a regular menu item class with condiments.
3. Click the **Condiments Group** tab, and then change all Allowed Condiment Groups to Required Condiment Groups.
4. From the Allowed Condiment Groups section, select the condiment group you created in the section Creating Menu Items Classes for Prefixes.
5. Click the **Forced Condiments** tab, and then set the **Minimum** value for the previously enabled condiment groups to 0 (zero).
6. Repeat Steps 2 through 5 for all regular menu items with condiments.
7. Click **Save**.

Configuring Touchscreen Buttons for Condiment Prefixes

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Locate the Combo/Condiment Orderer and deselect **Allowed**.
3. Click **Save**.
4. Insert a new button on the transaction screen, select **Menu Item** as the button type, and then select a prefix as the menu item (for example, ADD).
5. Enter or generate a legend for the button, and then click **Save**.
6. Repeat Steps 4 and 5 to configure touchscreen buttons for the remaining condiment prefixes.

Setting Condiment Appearance

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Format Parameters**.
2. Click the **Options** tab, and then select the appropriate options:
   - To show as many condiments as possible printed together on each line of guest checks and customer receipts, select **4 - Wrap Condiments on Guest Checks**.
   - To hide previous round condiments and show only the parent menu item when a workstation operator picks up a check, select **35 - Hide Previous Round Condiments on Display**.
   - To set the check detail area to actively sort condiments while they are added, select **45 - Sort Current Round Condiments on Screen**. Condiment sorting occurs only when items are in different print groups and the parent allows condiment sorting.
3. Click **Save**.
4. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Control Parameters**.
5. Click the **Options** tab, and then select the appropriate options:
   - To show only condiments that workstation operators are allowed to add with the parent menu item, select **37 - Enable Condiment Masking**.
   - To allow workstation operators to add condiments out of order (conversational ordering), select **44 - Permit Required Condiments To Be Entered Out Of Order**.
6. Click **Save**.
7. Select the revenue center, click **Setup**, and then click **Order Devices**.
8. Double-click a printer record, and then click the **Options** tab.
9. To print condiments in red font, select **10 - Print Condiments in Red (Overrides Print Class Settings)**.
10. Click **Save**.

Popup Condiment Orderer

The Popup Condiment Orderer provides a screen workflow that automatically advances the workstation operator through required condiments when adding menu items.

The Popup Condiment Orderer resides in a template. The system creates a page (based on the template) that pops up for required condiments. When adding a menu item (for example, Steak) that requires condiment selection to a transaction, the page with the template appears as a popup where the workstation operator can select the required condiment groups (for example, meat temperature and sauce).

The workstation operator can also recall a Popup Condiment Orderer to modify the required condiments of a previously ordered menu item. The workstation operator can select the parent item or condiment in the check detail or select the Recall Popup Condiment Orderer function key (depending on configuration).

Unlike the regular Condiment Orderer, the Popup Condiment Orderer automatically pops up and closes.

Complete the following tasks to set up the Popup Condiment Orderer:

- Configure a Popup Condiment Orderer page
- Configure a revenue center to use the Popup Condiment Orderer
- Configure a menu item class to use the Popup Condiment Orderer

Configuring a Popup Condiment Orderer Page

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Insert a record for **Popup Condiment Orderer** if it does not exist.
3. Double-click the record to open it.
4. Select **Specify Template**, and then select **Popup Condiment Orderer** from the **Internal Templates** list.

   The template is preset with a Condiment Orderer control and a Done button. You cannot delete these elements from the template, nor can you copy elements to this template. The Popup Condiment Orderer template supports two key functions: Void and Transaction Cancel.
5. From the **Popup Type** drop-down list, select the location for the Popup Condiment Orderer on the page. (The Popup Types do not apply to POS clients running the Android mobile operating system.)
   - **Full Screen**
   - **Centered**
   - **Next to Check Detail Area**
   - **In Dynamic Content Area**
6. Select **Allow selection in check detail area** to allow workstation operators to select the current menu item and its condiments in the check detail area while the Popup Condiment Orderer is open.
7. Select **Manually dismiss Condiment Orderer** to have the Popup Condiment Orderer remain open after the workstation operator selects all required condiments. The workstation operator must use the **Done** button to close the Popup Condiment Orderer.

   If you configure required condiment groups with a zero minimum count, select **Manually dismiss Condiment Orderer**. Otherwise the Popup Condiment Orderer automatically closes because the application meets the minimum required count (zero) before the workstation operator orders a condiment in the group.
8. (Optional) Change the page settings, such as layout and button styles. You cannot modify the dimmed settings.
9. (Optional) Repeat Steps 2 through 8 to create additional Popup Condiment Orderer pages. The POS client requires one page for initial condiment selection and subsequent editing, although you can configure two pages.

   When you designate Next Page/Panel for menu items (in menu item classes and on menu item buttons), the POS client goes to the designated page or panel after the Popup Condiment Orderer closes (either manually or automatically).
10. Click **Save**.

Configuring a Revenue Center to Use the Popup Condiment Orderer

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. From the **Default Condiment Ordering Popup** drop-down list, select the default Popup Condiment Orderer Page to appear when the workstation operator adds a menu item with required condiments for the revenue center.
3. From the **Default Condiment Editing Popup** drop-down list, select the default Popup Condiment Orderer Page to appear when the workstation operator selects a menu item with required condiments in the check detail area for the revenue center.
4. Click **Save**.

Configuring Menu Items Linked to Classes to Use the Popup Condiment Orderer

The Popup Condiment Orderer configuration in the Menu Item Classes module overrides the revenue center configuration in the RVC Parameters module.

If you do not configure a revenue center or menu item class to use the Popup Condiment Orderer, the feature is turned off. You can use a mix of the settings. For example, you can set the revenue center to use the Popup Condiment Orderer, and set specific menu items to use the revenue center parameter, other menu items to use a different Popup Condiment Orderer, and some menu items with no popup.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click the menu item class record.
3. From the **Condiment Order Popup** drop-down list, select the Popup Condiment Orderer Page to automatically appear when the workstation operator orders a menu item with required condiments:

   If you want the menu item class to use the Default Condiment Ordering Popup assigned to the revenue center, select **0 - Use Revenue Center Parameter**.
4. From the **Condiment Edit Popup** drop-down list, select the Popup Condiment Orderer Page to automatically appear when the workstation operator selects a menu item with required condiments in the check detail area:

   If you want the menu item class to use the Default Condiment Editing Popup assigned to the revenue center, select **0 - Use Revenue Center Parameter**.

   To use gestures on transaction pages, set the **Condiment Edit Popup** to **No Popup** for the menu item classes, and use the **Recall Popup Condiment Orderer** function key to modify previously ordered required condiments.
5. Click **Save**.

33

Combo and Fixed Price Meals

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

A combo meal group allows you to configure the menu items within a group so that the POS client knows which items to combine. Two typical combo meal groups are combo sides and combo drinks. For example, you can configure a meal named Combo 1 with a primary menu item called Combo Sandwiches and additional Combo Groups (such as Combo Drinks and Combo Side Items).

A fixed price meal (FPM) is a complete meal offered at a fixed price. For example, during special occasions or holidays, restaurants sometimes serve multi-course meals with only a few menu item choices for each course, and charge a fixed total price.

There is no restriction on the number of FPMs or courses. The workstation operator can order multiple meals on the same seat. The sides can default to a placeholder menu item that the workstation operator replaces in a later round. Placeholder menu items can be shown or hidden in the check detail area.

You can configure FPMs like combo meals. Creating Combo Meal Groups contains more information about assembling required items for a FPM, and assigning alternate groups to allow guests to substitute items.

Combo Meal Group Pricing

You can use many pricing scenarios for combo meal groups, as described in the following examples.

Pricing Combo Meal Groups Based on Side Items

You can price side items on the combo meal's side items level instead of the pricing at the combo meal groups items level. In some cases, this simplifies combo meal price configuration. If you set prices in both places, the pricing on the combo meal groups item level takes precedence. Consider the following examples:

- (Traditional Pricing) Combo Meal #1 Drink price $0.99
- (Traditional Pricing) Combo Meal #2 Drink price $1.09
- (Side Item Pricing) Milk (drink choice) price $1.50 (upcharge)

1 Combo Meal #1: Root Beer $0.99

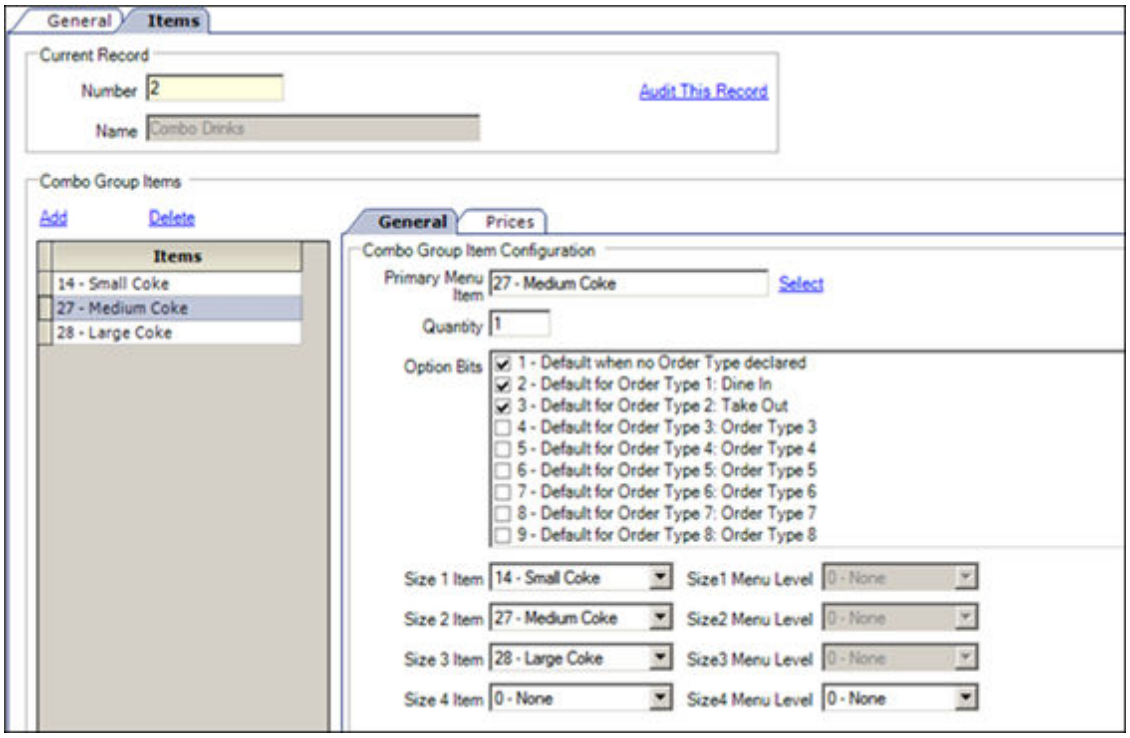
1 Combo Meal #1: Milk $1.50

1 Combo Meal #2: Root Beer $1.09

Pricing Combo Meal Groups Based on Size

The following figure illustrates the configuration of a basic combo meal group using different sizes and associated prices. A combo meal group called Combo Drinks contains the menu items Small Cola, Medium Cola and Large Cola. The Medium Cola is the default drink for all applicable Order Types. The workstation operator does not need to make a selection when adding the combo meal item using the workstation. The application automatically adds the Medium Cola as the default selection. (A workstation operator can modify this choice using the sizing or substitute function keys.) You can apply the prices of $1.00 for the Medium Cola and $2.00 for the Large Cola. To use combo meal sizing, set the Small Cola as the Size 1 Item, the Medium Cola as the Size 2 Item and the Large Cola as the Size 3 Item. You must set Size 1-4 Item settings for all sizable combo group items listed. To enable workstation operators to add or change combo meal item sizes, add buttons to the combo transaction page using the Page Design module.

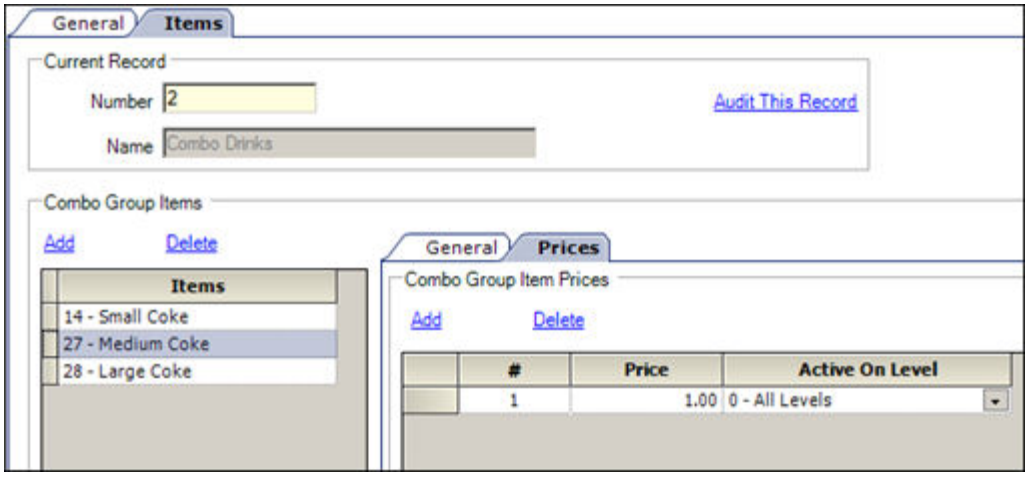
Figure 33-1 Example of Pricing Based on Item Size



Pricing Combo Meal Groups Based on Menu Item Definition

The following figure shows another optional pricing convention. You can price any combo meal menu item (for example, a Hamburger Combo to include all combo side and drink items). Set the combo's price in the menu item definition record (in the Menu Item Maintenance module), and deselect option **4 - Add Side Prices To Meal Price** in the Combo Meals module.

Figure 33-2 Example of Pricing Based on Menu Item Definition



Another method is to lower the combo meal menu item price and then roll the price of the combo sides and combo drink items into the price of the primary combo meal menu item.

Placeholder Menu Items in Combo Meals

When ordering a combo meal, the guest might not know what they want for dessert when placing the initial appetizer and entrée for a combo meal. The workstation operator can post a placeholder menu item to complete the combo meal, substituting it with the guest's dessert choice (made after the entrée is cleared and they are ready to order dessert). Placeholder items stand in for unknown items until the workstation operator substitutes the placeholder item with the actual menu item in a subsequent service round.

You need to configure a placeholder as a menu item (MI), including inserting a MI master, MI definition and a 0.00 MI price record. Additionally, assign a MI class to its MI definition file using the placeholder options. Then add the placeholder menu item to each desired combo meal group (for example, combo sides) so Simphony shows placeholder items on the condiment orderer area of the page. When the workstation operator selects the placeholder item, it occupies a place in the check to enable service totaling.

The workstation operator can substitute the placeholder menu item at any time prior to closing the check. After substituting it with a valid item (as shown in the following figures), the workstation operator cannot change the item back to a placeholder item. However, the workstation operator can substitute with another valid item.

Figure 33-3 Example: POS Workstation SIZE Placeholder Menu Item

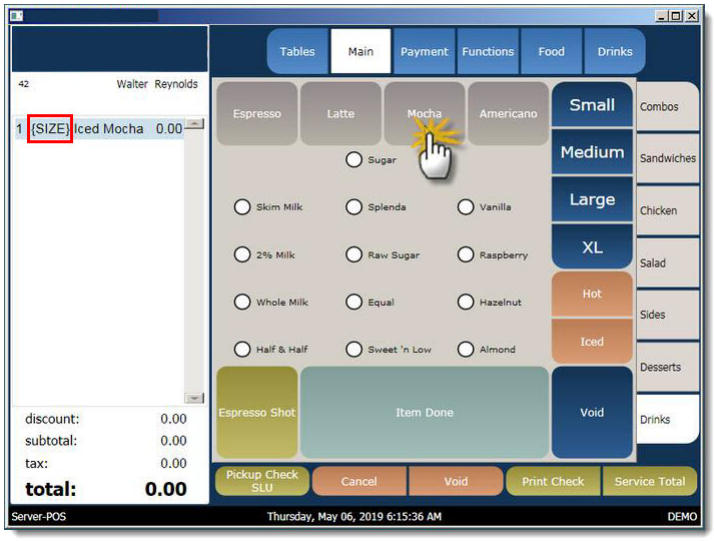
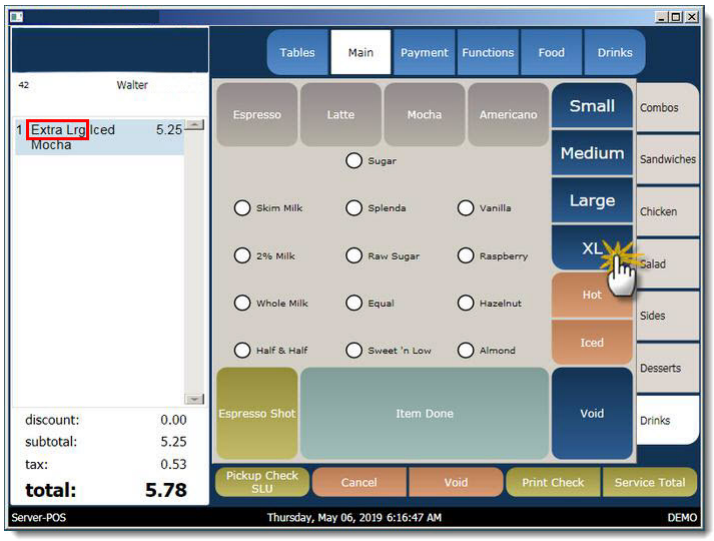


Figure 33-4 Example: POS Workstation XL Sized Menu Item is Selected



Creating Combo Meal Groups

You need to configure the menu items that comprise a combo meal group. Then you can configure combo meals using two EMC modules: Combo Meal Groups and Combo Meals. Configure the Combo Meal Groups module first and then configure the Combo Meals module.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Combo Meal Groups**.
2. Insert a record for a new combo meal group with the appropriate name, or double-click an existing record.
3. Select the appropriate combo group configuration options:

- **1 - Allow Discounts**: Select this option to apply discounts to items in the group. The discount being applied must have option **25 - Discount Combo Meal Group Items** set from the Discounts module.
- **2 - Substitution Group items use this sides price**: Select this option to set the menu item price to the side's combo meal price specified on the combo meal form. The price setting occurs when the workstation operator substitutes a combo meal side with a menu item from an alternate group. Deselect this option to set the menu item price in the alternate group.

4. (Optional) To enable substitution side items, add **Alternate Groups** using the **Add** link.
   - When **Alternate Groups** are present, workstation operators can substitute combo side items with other combo meal groups. For example, the guest might want to have an onion rings side item that is generally available in Combo Meal #2 with a Combo Meal #4. You can add a Combo Onion Rings alternate group that enables menu item substitution with a Combo Fries group. Configuring alternate side groups enables the application to substitute these side menu items. You must configure an Alternate Side button (using the Page Design module) to substitute items in the POS client.
   - If you are using Simphony version 2.7 MR3 or later, configure FPMs in the **Alternate Groups** field. For example, guests often substitute an appetizer or salad for the entrée portion of an FPM and this field accommodates these substitutions.
5. Click the **Items** tab to configure all menu items within a combo meal group.
   - To have all of the combo meal side items sent to the order device of the parent item, select **11 - Send to Combo Parent Order Devices**. This enables an entrée that comes with two sides to print to the same order device.

     For example, if you have a steak with mashed potatoes and broccoli, you can send the steak, potatoes, and broccoli to the grill order device. Deselect option **11** to send the steak and potatoes to the grill order device and the broccoli to the pantry order device.
6. Click the **Add** and **Delete** links to add or remove menu items from the combo meal group.
7. Enter or select information in the following fields for each item:

Table 33-1 Combo Meal Group Fields

Field or Option	Description
Primary Menu Item	Select a menu item to be the primary item in the combo meal group. This field shows all menu item master records that contain a definition in the revenue center.
Quantity	Enter the number of times the menu item is needed in the combo group (for example, a combo meal has one hamburger).
1 - Default when no Order Type declared	Select this option to make the selected item the default item for the combo group without an Order Type.
2 - 9 Default for Order Types 1-8	Select these options to make the selected item the default item when Order Type 1 (through 8) is active. Deselect these options to have the workstation operator select an item to fulfill the combo meal requirements.

Table 33-1 (Cont.) Combo Meal Group Fields

Field or Option	Description
10 - Autofill	Select this option to change the quantity of the side item ordered to the number of remaining items to complete the side requirements when the workstation operator orders one of the combo meals and more than one remaining item is required.
Size 1-4 Items	Select a menu item that substitutes for the **Primary Menu Item** when using the Combo **Size 1** through **Size 4** function keys (set in Page Design under **Type**). This list shows all menu items assigned to the combo group after saving the items. You cannot copy or paste combo meal groups in the EMC. The Size 1-4 Items field populates only after you save items. For example, if you create a new combo group and add the items Soda and Large Soda, you must save these items before selecting either item in this field.
Size 1-4 Menu Levels	Select a menu level that can affect the price of the substituted Size 1-4 Items.

8. To set specific side items with a different price (upcharge), click the **Prices** subtab.

   For example, Fries are priced at $0.00, but there is an extra charge of $1.25 when the guest orders Onion Rings.

9. Click the **Add** and **Delete** links to add or remove prices for each item. You can configure up to 8 prices for a single item.

   Set the following fields when adding a price:

   - **Price**: Enter the price to charge for the item.
   - **Prep Cost**: Enter the à la carte price of the combo group item.
   - **Active On Level**: Select the menu level on which the price is active.
   - (Optional) **Effectivity Group**: Select the effectivity group for this price.
   - (Optional) **Date Start** and **Date End**: Enter start and end dates.

10. Click **Save**.

Creating Combo Meals

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Combo Meals**.
2. Insert a record for a new combo meal, or double-click an existing record.
3. Click the **Select** link next to the **Menu Item Master** field, select the menu item that represents the combo meal, and then click **OK**.
4. Click the ellipsis point button, select the **Primary Combo Group**, and then click **OK**.

   This is the combo meal group of the primary item for the combo meal. For example, if you have a Burger Combo, you might select a Burgers Combo Meal Group.

5. In the **Priority** field, enter the combo meal priority when workstation operators press the **Auto Combo** function key.

6. From the **Auto Combo Algorithm** drop-down list, select the setting for the application to use when the workstation operator creates a combo meal from menu items already listed on a check. When the workstation operator presses the **Auto Combo** function key, the application uses one of the following options to combine the combo meal items:
   - **0 - First Deal Found**: Select this option to have the application use and combine the first items found.
   - **1 - Best Deal for Customer**: Select this option to combine the most expensive items as a combo meal.
   - **2 - Best Deal for Merchant**: Select this option to combine the least expensive items as a combo meal.
7. Select the appropriate options as described in the following table:

Table 33-2 Combo Meal Options

Option	Description
1 - Disable Auto-Combo Recognition	Select this option to prevent the combo meal from being considered when the workstation operator presses the **Auto Combo** function key.
2 - Allow Auto-Combo in Previous Round	Select this option to allow the combo meal to consider previous-round items when the workstation operator presses the **Auto Combo** function key.
3 - Is Sized Combo Meal	Select this option to allow the combo meal to use Combo Size **Size 1-4** function keys, changing the size of the items ordered.
4 - Add Side Prices To Meal Price	Select this option to add the prices of the meal's side items to the price of the meal on the Kitchen Display System (KDS) display and the customer receipt.
5 - Only Print Priced Sides On Guest Check	Select this option to prevent the meal's side items from printing on the customer receipt when they have no price, or when their price rolls into the price of the meal.
6 - No Charge For Condiments	Select this option when added condiments (to the meal) are non-priced.
7 - No Bulk Order With Quantity Order	Select this option to prompt the workstation operator for each non-default side item per meal. This option is used when a workstation operator adds more than one combo meal. Deselect this option to allow the workstation operator to specify a count when ordering non-default side items. When you deselect this option, the application does not continue to the next side item until all of the combo meals satisfy the side items requirement.
8 - Allow Resizing of Individual Sides	Select this option to allow the workstation operator to change the size of one selected combo meal side item. Deselect this option to allow the workstation operator to resize the entire combo meal.

Table 33-2 (Cont.) Combo Meal Options

Option	Description
9 - Do Not Show With Combo Meal Choices	If workstation operators can create multiple combo meals from the existing menu items listed on a check and you select this option, a system-generated list of available choices does not include the combo meal. This combo meal only appears in the list when no combo meals are found.
10 - Keep Last Item Selected after Ordering a New Meal	Select this option if you expect modifications to the combo meal after adding the last side, keeping the combo meal selected. This is particularly useful if the last side is often modified.
11 - Is Defined Combo Meal	Select this option to allow the application to incorporate the meal items in the combo as individual menu items in the Auto Combo On The Fly process. For example, you can configure a Donut 6 combo meal and set option **11**. When a guest orders a Donut 6 combo and then adds one more donut, the option allows the application to handle the Donut 6 combo as six individual donuts. The auto combo procedure creates an auto combo meal from the menu items added to the check in the current round and initiates a Donut 7 combo instead of adding a seventh donut at full price. This results in a lower price for the customer.

8. To add a combo group:
   a. Cick the **Add** link in the **Combo Groups** section.
   b. Enter the **Side Count**.
   c. Click the ellipsis pint button in the **Side Item Group** column, select the side items for the combo meal, and then click **OK**.

      For example, if the combo meal is a Burger, Fries, and Soda, the side items include two Combo Meal Groups: Fries and Soda.
   d. To include only the menu items that are active at the menu level in the combo meal group SLU list, select the default size for a combo meal side item using the **Default Menu Level** drop-down arrow.

      The menu item's active menu level needs to be configured in order to select the **Default Menu Level**. Configuring Active Menu Levels for Menu Item Definitions and Prices contains more information.

      The menu level availability is configured for each individual item in the Menu Item Maintenance module. The **Main Level Link** must be selected in the Menu Item Maintenance module. Configuring Menu Item Definitions contains more information.

      A workstation operator can select the menu items that appear on the page by switching between menu levels on the POS client. If the workstation operator uses a main or sub level button while this side item is active, the Menu Level Change dialog appears after adding the side item to the guest check.

      Using the example shown in the following table, you can have the SLU show only medium sized beverages by setting the side item's **Default Menu Level** to 3 in the

Combo Meals module. Workstation operators can use the Menu Level buttons to switch to the small and large size beverages. To have the SLU show all sizes of beverages in this example, set the **Default Menu Level** to 1.

Table 33-3 Example of Menu Levels Used for Combo SLU Sizes

Number	Default Menu Level
1	Small Beverage Medium Beverage Large Beverage
2	Large Beverage
3	Medium Beverage
4	Small Beverage

e. To configure the SLU menu item sizes that appear on a workstation page, select the **Menu Level**.

   Selecting the **Menu Level** reduces the number of items shown in a SLU, making it easier for workstation operators to locate the right combination of menu items and sizes for a combo meal without scrolling through many lists. The list of items in the SLU changes based on the Menu Level. If there are no Menu Levels configured, all SLU items appear on the workstation.

9. Do not price items within the combo meal's **Combo Group Price** field for combo size meals as this could cause issues with the **Size 1-4 Items** fields in the Combo Meal Groups module. See Creating Combo Meal Groups for more information.
10. Click **Save**.

Configuring Additional Combo Meal Settings

You can configure additional combo meal options in various EMC modules.

1. To prevent tendering with incomplete combo meals:
   a. Select the Enterprise, property, or zone, click **Configuration**, and then click **Tender/Media**.
   b. Double-click the tender media record.
   c. Click the **Options** tab, and then click the **Printing Options** subtab.
   d. To prevent the tender from being enabled when a meal is missing a side item, select **85 - Not Allowed With Incomplete Meals**.
   e. Click **Save**.
2. To enable workstation operators to add incomplete combo meals and placeholder items:
   a. Select the Enterprise, click **Configuration**, and then click **Roles**.
   b. Double-click the role record.
   c. Click the **Operations** tab, and then click the **Transactions** subtab.
   d. To enable workstation operators to add a parent item without a required condiment, select **161 - Allow Incomplete Item**.

      The parent menu item must have **59 - Allow Item Incomplete Based on Role** set from the Menu Item Classes module.

e. To enable workstation operators to authorize or perform a service total or tender on a transaction with a placeholder item, select **164 - Authorize/Perform Service Total/ Payment with Placeholder item**.

   You must also set option **85 - Not Allowed With Incomplete Meals** in the Tender/ Media module. Placeholder Menu Items in Combo Meals contains more information.

f. Click **Save**.

3. To control a user's ability to change non-placeholder side items added during a previous round for combo meal orders:

   a. Select the Enterprise, click **Configuration**, and then click **Roles**.

   b. Double-click the role record.

   c. Click the **Operations** tab, and then click the **Transactions** subtab.

   d. In the **Transaction Control Options** section, select **310 - Authorize/Perform changes to non-placeholder side items ordered in previous rounds**.

      When this option is disabled, workstation operators are prompted to have a privileged employee enter their ID in order to continue changing previous round non-placeholder combo meal side items.

4. To configure revenue center parameters for combo meals:

   a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.

   b. Click the **Options** tab.

   c. To enable the combo key to function with Auto Combo Meal recognition, select **51 - Allow Auto Combo Meal Recognition with the "Combo" key**.

   d. To enable the Auto Combo Meal recognition to create combo meals from menu items that were ordered in previous rounds, select **52 - Allow Creation of Combo Meals from Previous Round Menu Items**.

   e. To show a list of combo meal choices when the workstation operator attempts to create meals from menu items already on the check, select **55 - Show Combo Meal Choices**.

   f. To have the application create combo meals from the menu items added to the check in the current round, select **58 - Auto Combo Items On The Fly**.

   g. Click **Save**.

5. To configure menu item class options:

   a. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.

   b. Double-click the menu item class record.

   c. Click the **Options** tab.

   d. To indicate that all menu items in the class are the priced (parent) portion of a Fixed Price Meal, select **35 - Fixed Price Meal**.

      If this option is not selected, the class is treated as a child (non-priced) component of a Fixed Price Meal. The system relies on the setting of the Course Mask options to determine whether a menu item class is associated with a fixed price meal.

   e. To enable the workstation operator to add a menu item without satisfying the required condiment's conditions, select **59 - Allow Item Incomplete Based On Role**.

      The role privilege **161 - Allow Incomplete Item** must be set for the workstation operator ordering a parent item with this menu item class.

f. If the menu item is a placeholder in a combo meal, select **60 - Placeholder**.

g. To hide placeholder items from the check detail area, select **61 - No Placeholder Display**.

h. Click **Save**.

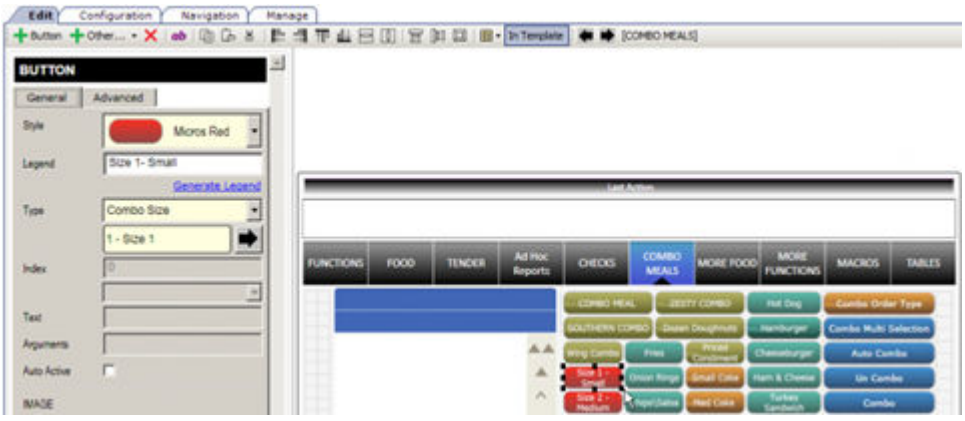
Creating Combo Meal Pages

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page (typically the Transaction page) on which to place the combo meal keys and functions.
3. Click **Button**, and then create combo meal menu item keys on the Transaction page.
4. Click **Other...**, and then add a **Condiment/Combo Orderer**.

   Add the Condiment/Combo Orderer to the same Transaction page as the combo menu items and function keys to view the combo meals and substitute side items easier.
5. Select the **Condiment/Combo Orderer**, click the **Data** tab, and then select **Display Title Bar**.

   The Display Title Bar on the POS client indicates when required combo meal sides or condiments are not ordered.
6. Select **Combo Meal Side** to have the application generate and show combo meal side items.
7. (Optional) Create combo meal size keys (if needed). These keys enable switching between sizes of combo meal items. You can name the combo size keys for an actual size such as small, medium, or large, or Combo Size 1, Combo Size 2, and so on.

Figure 33-5 Combo Meal Size Key



8. Add the appropriate function keys to the Combo Meal Transaction page (for example **Combo**, **Un-Combo**, **Auto Combo** and **Combo Multi-Selection**).

   Combo Meal Function Keys contains more information about each combo meal function key.
9. Configure keys for all individual menu items available (in particular combo groups).
10. Click **Save**.

Configuring a Smart Key to Show Menu Level Buttons

You can configure a smart key that workstation operators use to change menu levels. Define a smart key on the page containing the Condiment/Combo Orderer and set the main and sub level buttons for only small, medium, and large levels to appear when a combo side item with a default menu level is active. The buttons disappear from the page when the combo meal moves to the next side item or is complete. The smart key is only active while adding a combo meal side with a default menu level.

Follow these steps to implement the smart key.

1. Select the Enterprise, zone, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Select the page that has the **Condiment/Combo Orderer**. This is typically the Transaction page that also has the combo menu items and function keys.

   Creating Combo Meal Pages contains information about configuring the **Condiment/ Combo Orderer**
3. On the **Edit** tab, click **Button**.
4. Enter information in the Page Design fields.

Table 33-4 Page Design Edit Fields

Field	Entry
Legend	Enter the name of the button (for example, Smart Key).
Type	Select **Function** from the drop-down list.
Sub Type	Click the black arrow, and then select **Smart Key**.
Auto Active	Select this option to make the button automatically active.

5. Click the **Edit Smart Keys** button.
6. Click **Add**.
7. Enter information in the fields as described in the following table for the Main Level smart key.

Table 33-5 Smart Key 1 Fields

Field	Smart Key Entry
Condition	Select **Combo Side Default Level Active** from the drop-down list.
Value	Enter **1**.
Legend	Enter the name of the button (for example, Small, Medium, or Large).
Type	Select **Main Menu Level** from the drop-down list.

8. Click **Add**.

9. (Optional) Enter information in the fields as described in the following table for the Sub Level smart key.

Table 33-6 Smart Key 2 Fields

Field	Smart Key Entry
Condition	Select **Combo Side Default Level Active** from the drop-down list.
Value	Enter **2**.
Legend	Enter the name of the button.
Type	Select **Sub Menu Level** from the drop-down list.

10. Click **Close**.
11. Click **Save**.

Combo Meal Function Keys

Workstation operators can use the following function keys (if configured) with combo meals:

Table 33-7 Combo Meal Function Keys

Function Key	Description
Auto Combo	This key allows the workstation operator to create one or more combo meals from existing menu items.
Combo	This key changes the selected item or the last item on the check to a combo meal. The item must be a primary combo item. For example, if the combo meal is a burger with fries and a drink, the burger item must be the highlighted item or the last item ordered before pressing this key.
Combo Alternate Side	This key allows the workstation operator to substitute a combo meal side with a selection from another combo meal group (for example, when a customer orders an appetizer instead of an entree in a combo meal).
Combo Bulk Order	This key allows the workstation operator to order multiple combo meals at a time. The workstation operator must meet each combo's side item requirements before moving on to order the next combo's side items.
Combo Multi Selection	This key allows the workstation operator to select existing menu items to combine into a combo meal. This function shows the check detail in a window, which allows the workstation operator to select individual items to make up the combo meal. This gives the workstation operator greater control in determining what is included in the combo meal.
Un-Combo	This key separates an existing combo meal into individual à la carte items (non-combo pricing takes effect).
Type - Combo Order Size	This key changes the order size before ordering the combo meal.

Table 33-7 (Cont.) Combo Meal Function Keys

Function Key	Description
Type - Combo Size 1-4	These keys change the combo size after ordering the combo meal. Using these keys causes the workstation to resize the selected combo meal or combo meal side item to selected sizes 1 through 4. If the workstation operator does not select an item, the last item on the check is resized.

34

Guest Checks

A guest check contains a record of all sales on the check, from the guest's initial menu item to final payment.

Configuring Guest Check Numbers

The guest check number can be between 1 and 99999999 (an eight-digit number). Generally check numbers are created in sequential order. If a workstation operator begins check number 10000007, the next check number for the revenue center is 10000008. Check numbers are maintained at the revenue center.

If the property has multiple revenue centers and wants to keep unique check numbers for each revenue center, you can assign an exclusive range or check numbers per revenue center. For example, Revenue Center 1 could have checks from 1000 to 1999 and Revenue Center 2 could have checks from 2000 to 2999.

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. To set guest check numbers to generate automatically, enter the **Min Guest Check #** and the **Max Guest Check #** on the **General** tab.

   When Simphony generates check numbers automatically, after reaching the Max Guest Check # value, the next check number is the Min Guest Check # value.
3. To enable workstation operators to manually assign guest check numbers, click the **Options** tab, and then select **1 - Operator Assigns Check Numbers**.

   This option is used at properties that have guest checks with pre-printed numbers.
4. Click **Save**.

Configuring Guest Check Headers and Trailers

Guest check headers and trailers are leading and trailing lines that print on guest checks. Typically, the header lines include the name of the property or revenue center and address. The trailer lines generally show gratitude or promotional information about upcoming events. At hotels, guest check trailers are often configured to show room charge information for the customer to complete. You can also set a header or trailer line to print logos rather than text.

Headers print automatically on guest checks. You must set trailers to print per tender/media record.

1. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click either **Guest Check Headers** or **Guest Check Trailers**.
2. For each row, enter information in the following fields:
   - **Text**: Enter the text to appear on the header or trailer.
   - (Optional) **Use Logo**: Select this option to print a logo rather than text on the guest check header or trailer.
   - (Optional) **Logo**: If you selected **Use Logo**, select an image.

3. Click **Save**.
4. To configure trailers to print for each tender media record, select the Enterprise, property or zone, click **Configuration**, and then click **Tender/Media**.
5. Double-click the tender record.
6. Click the **Options** tab, and then click the **Printing Options** subtab.
7. Set the appropriate options as described in the following table:

Table 34-1 Trailer Printing Options for a Tender Record

Option	Description
20 - Print Sales Itemizers	Select this option to print the sales itemizer lines on guest checks, customer receipts, and memo checks when workstation operators use the tender record. Deselect this option to suppress printing of the sales itemizers.
21 - Print Summary Totals	Select this option to print the summary totals (subtotal, tax, amount due, and change due) on guest checks, customer receipts, and memo checks when workstation operators press the key. Deselect this option to suppress printing of the summary totals.
22 - Print Check Trailer	Select this option to print the guest check trailer lines at the end of the guest check.
28 - Print Guest Check Trailer on Fast Transaction Customer Receipt	Select this option to print the guest check trailer on the customer receipt when workstation operators use the tender to close a fast transaction. Deselect this option to prevent the trailer from printing on customer receipts.

8. Click **Save**.

Creating a Service Total to End the Current Service Round of Checks

You can configure the following two types of service totals. Both types are used to end the current service round of guest checks:

- Service totals that send menu items to order devices, end the current service round, and post totals
- Service totals that send menu items to order devices, end the current service round, post totals, and print to order devices

1. To have the service total send menu items to order devices:
   a. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
   b. Insert a new record, enter a name for the new tender record (for example, Send), and then double-click the new tender record.
   c. From the **Key Type** drop-down list, select **Service Total**.
   d. Click **Menu Levels**, and then select the Main and Sub Levels on which the service total is active.

e. Click **Save**.

2. To have the service total send menu items to order devices and print the guest check:
   a. Select the Enterprise or property, click **Configuration** and **Tender/Media**.
   b. Insert a new record, enter a name for the new tender record (for example, Print), and double-click the new tender record.
   c. From the **Key Type** drop-down list, select **Service Total**.
   d. Click **Options** and then click **Printing Options**.
   e. Select **23 - Print Check on Demand**.
   f. Click **Menu Levels** and select the Main and Sub Levels on which the service total is active.
   g. Click **Save**.

Adding a Service Total Key to the Transaction Page

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page (typically the Transaction page) on which to place the Service Total function key.
3. On the **Edit** tab, select the page area in which to define the Service Total key.
4. Click **Button**.
5. On the **General** subtab, enter the function key name (for example, Service Total or Send and Stay (if you are using Send and Stay functionality)) in the **Legend** field.
6. From the **Type** drop-down list, select **Tender/Media**.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select the **Service Total** tender, and then click **OK**.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Configuring Pickup Next Check by Check Open Time

You can configure a function key to pick up the next check by open time. This function allows a workstation operator to pick up the next check based on the time the check was opened.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the pickup next check by check open time function key to appear on the workstation.
3. On the **Edit** tab, select the page area in which to define the **Pickup Next Check by Check Open Time** key.
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field (for example, `Pickup Next Check by Check Open Time`).
6. Select **Function** from the **Type** drop-down list.

7. Click the black arrow directly beneath the **Type** drop-down list.
8. Enter `pick` in the **Name** field, select **Pickup Next Check by Check Open Time** in the **Results** list, and then click **OK**.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Configuring Pickup Next Check by Service Total Time

You can configure a function key to pick up the next check by service total time. This function allows a workstation operator to pick up the next check based on the service total time, and is typically used in a drive-through environment.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the transaction page on which you want the pickup next check by service total time function key to appear on the workstation.
3. On the **Edit** tab, select the page area in which to define the **Pickup Next Check by Service Total Time** key.
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field (for example, `Pickup Next Check by Service Total Time`).
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list.
8. Enter `pick` in the **Name** field, select **Pickup Next Check by Service Total Time** in the **Results** list, and then click **OK**.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Configuring the Purge Order Threshold for Open Checks

A restaurant manager may want the system to void and cancel all open checks. When an open check is purged, detail on the check is voided and the check is canceled. The void is applied to the last transaction operator associated with the check and the void is performed by the workstation that owns it.

Checks that are open on a workstation, and checks containing a tender or credit authorization are not purged. If a check is owned by an offline workstation, it is not purged until the workstation is back online.

To access the RVC Parameters module and configure this feature, you must be assigned **View** and **Edit** employee privileges (using the Roles module). See the **Employees and Privileges** chapter for more information about configuring employee roles and EMC access privileges.

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. On the **General** tab, enter a time value in the **Purge Order Threshold (in Minutes)** field.

   The minimum Purge Order Threshold is 30 minutes. Set the value to `0` (zero) to disable the purge feature.

POS Operations scans for old checks every 5 minutes, so a check could be up to 34:59 old before it is purged.

3. Click **Save**.

Configuring Zero-Payment Transactions

You can allow employees (usually managers) to post a zero payment to close a guest check with a zero balance due. This feature provides more control in cases where sales may be posted and later voided to a zero balance.

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Posting** tab, and then select **5 - Zero or Negative Transactions Do Not Add to Guest or Guest Check Counts**.
3. Click **Save**.
4. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
5. Double-click the tender record that will have zero-payment transactions allowed.
6. Click the **Options** tab, and then click the **Interface Options** subtab.
7. Select **29 - On=Post 0.00 Transactions to PMS; Off=Do Not Post**.

   Enabling option **29** lets the system post 0.00 transactions to the property management system for the tender selected in step 5.
8. Click **Save**.
9. Select the **Enterprise**, click **Configuration**, and then click **Roles**.
10. Double-click the role type record (for example, manager).
11. Click the **Operations** tab, and then click the **Transactions** subtab.
12. In the Tender Media Options section, select the following options:
    - **38 - Authorize/Perform Closing of Checks with a Zero Balance**
    - **39 - Authorize/Perform Closing of Checks with a Negative Balance**
13. Click **Save**.

Fast Transactions

A Fast Transaction is a transaction that is started by selecting a menu item or scanning a barcode to post a menu item rather than selecting a Begin Check function key. Workstation operators can quickly start transactions by pressing a menu item key or scanning an item. Fast transactions are used in quick service, concessions, bars, or retail environments where a workstation operator begins transactions repeatedly, and rarely assigns customers to a specific table or check number. A fast transaction is completed in a single service round, and generates a customer receipt.

Configuring Fast Transactions

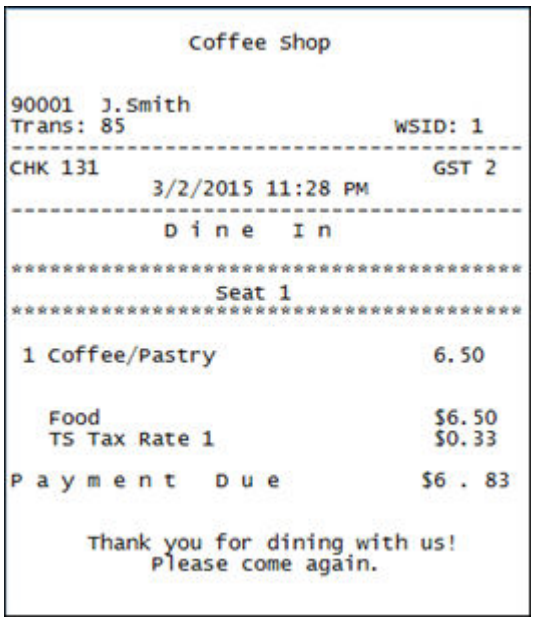
1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab, and then select **15 - Allow Fast Transactions**.
3. To prevent customer receipts from automatically printing after each fast transaction, select **9 - On Demand Customer Receipts**.

4. Click **Save**.
5. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
6. Click the **Options** tab.
7. To print the check number at the bottom of the customer receipt to be used as an order number, select **21 - Print order number at bottom of Receipts**.
8. Click **Save**.
9. Select the Enterprise, property, or zone, click **Configuration**, and then click **Tender/Media**.
10. Double-click the tender record.
11. Click the **Options** tab, and then click the **Printing Options** subtab.
12. To print the guest check trailer on the customer receipt when a workstation operator uses the tender to close a fast transaction, select **28 - Print Guest Check Trailer on Fast Transaction Customer Receipt**.
13. Click **Save**.

Full Seat Checks

A full seat check shows each seat's menu items with the subtotal separated by the seat header. Unlike a seat check, each full seat check includes a check header, a check trailer, and a paper cut.

Figure 34-1 Example of Full Seat Check



Configuring a Print Full Seat Check Service Total

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Add a new record, and then double-click it to open in form view.

3. Select **2 - Service Total** from the **Key Type** drop-down list.
4. Click the **Options** tab, and then click the **Printing Options** subtab.
5. Select **16 - Print Full Seat Check**.

   If you also select **14 - Print Seat Check**, option **16** overrides option **14**.
6. Select **21 - Print Summary Totals**.
7. Click the **Menu Levels** tab, and then select the Main and Sub Level on which the Print Full Seat Check Service Total is available.
8. Click **Save**.
9. Add a touchscreen button for the tender/media record that you created in Step 2. Creating a Full Seat Check Button contains more information about configuring the touchscreen button.

Creating a Full Seat Check Button

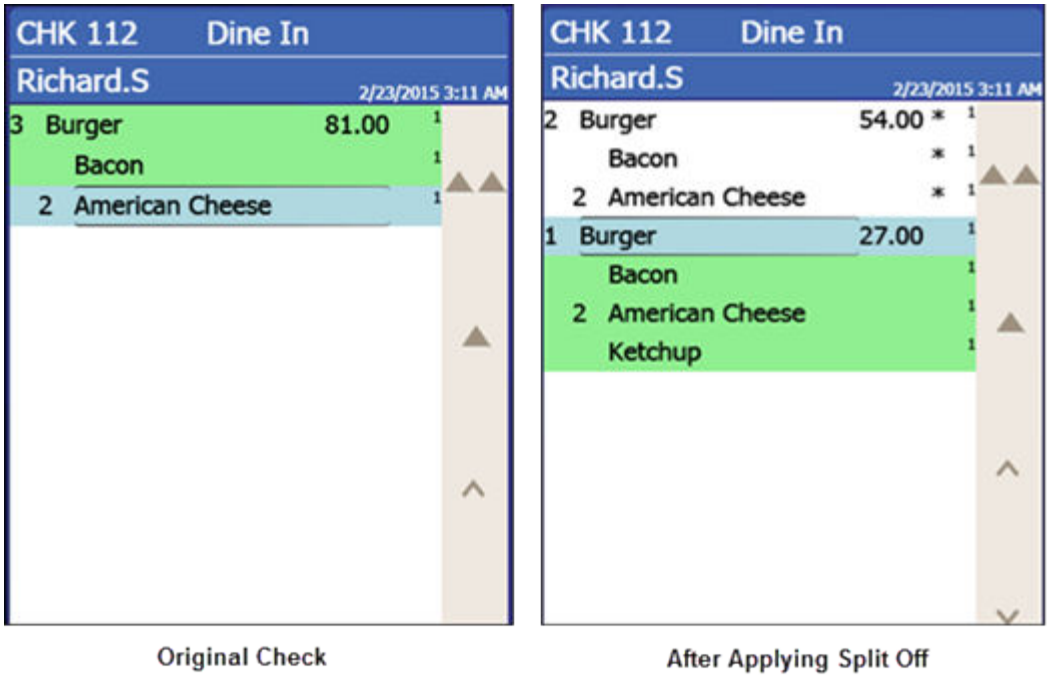
1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Full Seat Check button.
3. On the **Edit** tab, select the page area in which to define the Full Seat Check button.
4. Click **Button** to add a button.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. Select **Tender/Media** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, and then select **Full Seat Check**.
8. Highlight the **Full Seat Check** button.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Splitting Off an Item

A Split Off Item is a function key that enables workstation operators to separate (split) one or more items from a multiple quantity menu item entry so that it can be modified independently from the original item.

For example, a guest orders 3 burgers with 2 pieces of cheese and bacon. The guest then later requests to add ketchup to one burger. The workstation operator uses **Split Off Item** to separate one of the burgers and adds ketchup to it.

Figure 34-2 Example of a Check Before and After Splitting an Item



Original Check

After Applying Split Off

When a workstation operator splits a multiple quantity menu item with condiments (required or non-required condiments) the following results appear on the check:

- The condiments of the original item and their quantities are carried over to each split item.
- The quantity of the original parent menu item is reduced by the number of items split.

For example, if the workstation operator originally adds 3 burgers, after splitting one item, the original item entry shows as 2 burgers while the new split entry shows as 1 burger.

Configuring a Split Off Item Button

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the **Split Off Item** button.
3. On the **Edit** tab, select the page area in which to define the **Split Off Item** button.
4. Click **Button** to add a button.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, and then select **Menu Item**.
8. Highlight the **Split Off Item** button.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Adding the Assign Opera Account Button

After beginning a check, workstation operators can use the Assign Opera Account function to validate a guest's room number and last name. Upon validation, the confirmed OPERA account detail is stored in a way that it can be recalled for payment at a later time.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Assign Opera Account button.
3. On the **Edit** tab, select the page area on which to add the Assign Opera Account function.
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, select **Assign Opera Account**, and then click **OK**.
8. In the **Style** section, click the arrow to change the color of the button.
9. Position and size the button to the desired area and dimension on the page.
10. Click **Save**.

Conversational Ordering

Conversational ordering allows workstation operators to add specially configured menu items for guests who order these items in no particular sequence. For example, in a coffee shop, the workstation operator requires the following items:

- Drink Type (Espresso, Latte, Mocha, Tea)
- Drink Size (Small, Medium, Large)
- Drink Temperature (Hot, Iced)
- Condiments or Modifiers (Whipped Cream, Cinnamon, Skim Milk)

When using conversational ordering, the workstation operator adds the order as a guest states items (for example, an iced mocha, medium size, with whipped cream), improving Speed of Service (SOS), ease of ordering for guests, and overall order accuracy.

Setting up conversational ordering consists of completing the following tasks:

- Creating Menu Item Master Groups
- Configuring Menu Level Sets
- Configuring Menu Item Classes
- Setting Menu Items
- Creating Front of House Buttons

Creating Menu Item Master Groups for Conversational Ordering

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Menu Item Master Groups**.

2. Insert a new Menu Item Master Group.

   In the coffee shop example, you could create the following groups: Espresso, Latte, Mocha, and Americano.

3. Click **Save**.

Configuring Menu Level Sets for Conversational Ordering

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Level Sets**.
2. Insert a new Menu Level Set.

   In the coffee shop example, you could create Size and Temperature Menu Level Sets.

3. Select the **Default Master Group** for each Menu Level Set.

   In the coffee shop example, you could select **Drinks** as the Default Master Group. When a workstation operators selects a Menu Level in this group, Simphony determines which item of the selected Menu Item Group to apply to the check.

4. Double-click a Menu Level Set to open it in form view.
5. From the General section, select **2 - Bound to parent** to bind the Menu Item Master Group (for example, Drinks) to the custom Menu Levels (for example, Size and Temperature).

   When a guest initially orders a drink by either Size or Temperature, those menu items link to the Menu Item Master Group, which also link to Anonymous Menu Level Entry Options. This enables the workstation operator to add items in the exact order that the guest states or orders them.

6. From the Menu Level Entries section, click **Add**.
7. Enter menu level names for the Menu Level Set (for example, you could add Small, Medium, and Large Menu Level Entries to the Size Menu Level Set).
8. For each Menu Level Entry, select the **Default** and **Anonymous** options.

   Selecting these options enable the menu level sets to serve as temporary $0.00 placeholders for menu items when guests order them out of sequence.

9. Click **Save**.

Configuring Menu Item Classes for Conversational Ordering

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Insert a new Menu Item Class record.

   - For each menu item that a guest can order through Conversational Ordering, create at least two Menu Item Classes to accommodate the guest in ordering the same menu item in different ways. In the coffee shop example, each coffee type might have two classes: Latte Anonymous and Latte Defined. Create the Anonymous class first.
   - Create a generic Menu Item Class to assign only to Menu Item Definitions that are $0.00 priced menu items. In the coffee shop example, the Menu Item Class Drink Anonymous can be used for Menu Item Definitions such as {SIZE} Large Drink or {TEMP} Hot Drink. This Menu Item Class is assigned to the Default Master Group named Drinks.

3. Double-click a Menu Item Class to open it in form view.

4. From the General tab, select **2 - Replace in Condiment Group** from the **Condiment Order Type** drop-down list.

   Setting this option replaces the previously selected condiment with the latest condiment choice when the workstation operator selects condiments. If you set the Increment option, a priced condiment can be added to a transaction, such as a shot of espresso.

5. (Optional) Select the default parent to order from the **Default Master Group** drop-down list.

   In conversational ordering you can assign a default parent item to a condiment so that when the condiment is ordered without an existing parent, Simphony orders the condiment's default parent. For example, the condiment American Cheese has Burger as its default parent. If the workstation operator orders American Cheese and there is no current parent, Simphony orders the Burger automatically and the American Cheese appears as a condiment on the burger.

   Set this field only for condiments; it is meaningless for parent items.

6. Click the **Options** tab.

7. For each Menu Item Class with Anonymous in the name, select the following options:

   - **8 - Allow Menu Items in this Class to be Non-Priced**
   - **49 - Participates in Menu Item Master Switching**
   - **50 - Anonymous Menu Item**

8. For each Menu Item Class with Defined in the name, select the following options:

   - **8 - Allow Menu Items in this Class to be Non-Priced**
   - **49 - Participates in Menu Item Master Switching**

9. For the generic Menu Item Class, select the following options:

   - **8 - Allow Menu Items in this Class to be Non-Priced**
   - **49 - Participates in Menu Item Master Switching**
   - **50 - Anonymous Menu Item**

10. Click the **Condiment Groups** tab.

11. For each Menu Item Class, select the appropriate condiment groups:

    - **Required Condiment Groups**: These condiment groups must be entered when a workstation operator adds menu items in this class.
    - **Allowed Condiment Groups**: These condiment groups are allowed to be entered as condiments for menu items in this class.
    - **Member Condiment Groups**: These condiment groups consist of menu items in this class.

12. Click **Save**.

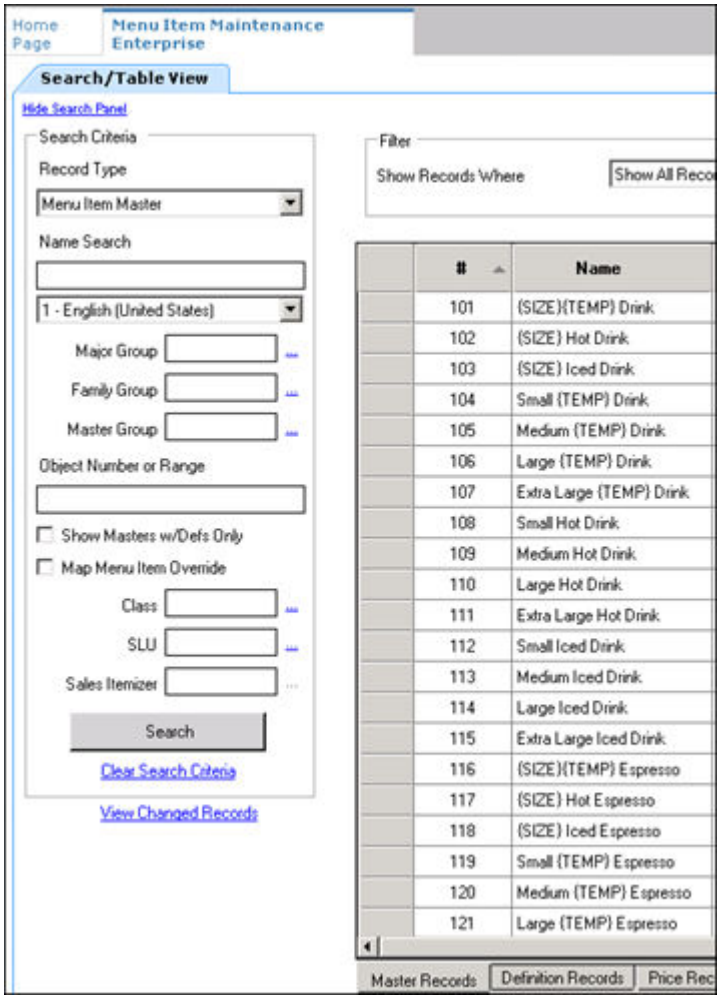
Configuring Menu Items for Conversational Ordering

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.

2. Insert a menu item master record for each menu item (including condiments) that can be ordered using conversational ordering. You need to account for all potential ordering combinations a guest might use. Use braces {} to surround the generic variables such as {SIZE} and {TEMP}.

In the coffee shop example shown in the following figure, you might have records for {SIZE} {TEMP} Drink, {SIZE} Hot Drink, and so on.

Figure 34-3 Menu Item Master Records for Conversationally Ordered Items



3. Select the **Major Group**, the **Family Group**, and the **Master Group**.
4. Click the **Definition Records** tab in the lower area of the page.
5. Set the following for each record:
   - Menu Item Class
   - Menu Item Price
   - Menu Level Availability
   - Default Condiments
6. Click **Save**.

Creating Buttons for Conversational Ordering

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Open the page on which to place menu item master buttons.
3. On the **Edit** tab, select the page area in which to define the menu items (including condiments) (typically the transaction area).
4. Click **Button** to add a button.
5. On the **General** subtab, select the appropriate function from the **Type** drop-down list.
6. Click the black arrow beneath the **Type** drop-down list.
7. Position and size the button on the page. Use the Style arrow to change the color.
8. In the **Legend** field, enter the button name.
9. Click **Save**.
10. Repeat these steps to create buttons for each of the menu item master names.

Configuring Employee Privileges for Automatic Check Firing

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click an employee role, click the **Operations** tab, and then click the **Guest Checks** subtab.
3. Select the appropriate privileges. The following table describes the privileges corresponding to automatic check firing.

Table 34-2 Employee Guest Check Privileges for Automatic Check Firing

Privilege	Description
183 - Begin Autofire Check using [Begin Autofire Check] Key	Select this option to allow employees in this role to create checks with orders that automatically fire at a preset time using the Begin Autofire Check function key.
184 - Authorize/Perform Pickup of Autofire Check Belonging to Another Operator	Select this option to allow employees in this role to pick up and edit checks with orders that fire at a preset time from other employees.
185 - Authorize/Perform Edit of Autofire Date/Time	Select this option to allow employees in this role to modify the date and time that orders are set to automatically fire.

4. To allow employees in this role to generate the Autofire Open Check Report from the workstation, click the **Ad Hoc Reports** subtab, and then select **31030 - Run Autofire Open Check Report**.
5. Click **Save**.

Configuring Automatic Check Firing (Autofire)

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Autofire** tab, and then configure the fields as described in the following table:

Table 34-3 Automatic Check Firing Fields

Fields and Options	Description
(Optional) Autofire Employee	To allow a specific employee to become the owner of all checks, including those placed using Transaction Services after the orders fire, select a workstation operator, and then click **OK**. • If you select an Autofire Employee, all sales totals post to the designated workstation operator and the checks appear under the Autofire Employee in the Open Check Report. • If you do not select an Autofire Employee, the check operator remains the owner of the check after the order fires.
Autofire Workstation	Select the workstation from which the orders fire and print. The application uses this value to determine the order output devices and workstation printers to use when an order fires.
Default Autofire Tender/Media	Select a service total that workstation operators can use with Autofire. You can assign any service total. Oracle recommends configuring a separate service total for automatic order firing to allow workstation operators to identify the designated touchscreen button. Creating a Service Total to End the Current Round of Checks contains information about configuring a service total.
Backup Autofire Delay (Mins)	Enter the amount of time (in minutes) that the autofire workstation must try to fire the orders. After the Backup Autofire Delay time elapses, if the autofire workstation is unsuccessful at firing the order, the workstation at which the check was originally created tries to fire the order. If both workstations fail, a memo chit prints and a workstation operator must manually fire the order.
(Optional) Maximum Days	Enter the maximum number of days for which workstation operators can schedule orders to fire automatically.
(Optional) 1 - Print Autofire Memo at Time of Entry	Select this option if you want a memo chit to print when workstation operators create orders that fire automatically.
(Optional) 2 - Print Guest Check at Time of Autofire	Select this option if you want a guest check to print when an order automatically fires to order devices. If you select this option, guest checks print at the guest check printer assigned to the autofire workstation.

Table 34-3 (Cont.) Automatic Check Firing Fields

Fields and Options	Description
3 - Enable Autofire in this Revenue Center	Select this option to allow the revenue center to create orders that fire automatically. If you are using DOM, do not enable Autofire or hold and fire.

3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click **Autofire Check Offline Header**.
5. From the **Text** column, enter the header lines to print on memo chits when orders fail to fire automatically.
6. To add a logo to the header, select **Use Logo**, click the ellipsis point (...) button from the Logo column, select the logo from the list, and then click **OK**.
7. Click **Save**.
8. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
9. Insert a new button on the transaction page, select **Function** from the **Type** drop-down list, and then select **Begin Autofire Check** from the **Function** list.
10. Click **Save**.

Configuring Employee Privileges for Check Re-firing

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click an employee role, click the **Operations** tab, and then click the **Transaction** subtab.
3. To allow employees in this role to re-fire items in a previous round, select **293 - Authorize/ perform re-fire Menu item**.
4. Click **Save**.

Configuring the Check Re-fire Button

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the transaction page on which to place the **Re-fire** button.
3. On the **Edit** tab, select the page area in which to define the **Re-fire** button.
4. Click **Button**.
5. On the **General** subtab, enter the button name (for example, Re-fire Pending Checks) in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, select **Re-fire**, and then click **OK**.
8. Position and size the button on the page. Use the Style arrow to change the color.
9. Click **Save**.

Suspend and Resume

With the Suspend and Resume feature, workstation operators can:

- Suspend a check started by another employee, and sign on to the workstation.
- Suspend a check when the workstation automatically signs off an employee.
- Suspend a check using a Service Total key.

When suspended, the check is stored in the memory until a workstation operator resumes it by signing on to a workstation.

Configuring Suspend and Resume

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab, and then select **60 - Enable Suspend/Resume**.
3. Click **Save**.
4. Select the Enterprise, property, or zone, click **Configuration**, and then click **Tender/Media**.
5. Insert a record with the tender name.
6. Double-click the tender record.
7. On the **General** tab, select **2 - Service Total** from the **Key Type** drop-down list.
8. Click the **Options** tab, and then click the **Ops Behavior** subtab.
9. Select **74 - Suspend Order**.
10. Click **Save**.
11. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tender Parameters**.
12. Click the **Configuration** tab.
13. To configure a default Suspend Order tender, in the **Default Suspend Order Tender** drop-down list, select the suspend order tender.

    A default Suspend Order tender is needed for certain suspend scenarios, such as when a workstation operator is auto-signed out or when another operator signs in.
14. Click **Save**.

Creating a Suspend and Resume Button

To allow workstation operators to manually suspend a check, you need to add a button assigned to the service total tender record.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Suspend/Resume button.
3. On the **Edit** tab, select the page area in which to define the Suspend/Resume button.
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field.

6. Select **Tender/Media** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, select the tender you created for the suspend and resume service total, and then click **OK**.
8. Position and size the button on the page. Use the Style arrow to change the color.
9. Click **Save**.

Setting the Employee Auto Sign Out Period

To automatically suspend a check and sign out an employee, you need to define the automatic operator popup interval.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
2. Click the **Configuration** tab.
3. In the **Automatic Operator "Popup" Interval (min:sec)** field, enter the amount of time (in minutes and seconds) that the workstation waits before signing out an inactive popup workstation operator.
4. Click **Save**.

Follow Me

Follow Me extends the functionality of the suspend and resume feature in Simphony. Follow Me allows workstation operators to use suspended checks across workstations in the same revenue center. This feature increases speed of service in a pub or fast casual restaurant environment.

For example, a pub may have three workstations and up to twelve bartenders working simultaneously. Each bartender can sign on and sign off at any workstation. A bartender can begin a check on workstation 1, prepare a drink, suspend the check (via idle timeout, manual suspend, or other employee sign on), and then sign on to workstation 2 to resume the check. The check is automatically resumed on workstation 2. Any menu items, discounts, and service charges that were added on workstation 1 appear on workstation 2. A check can be open on only one workstation at a time.

The journal logs the suspend and resume history of each check and lists the workstation on which the suspend and resume transaction was performed.

Configuring Follow Me Checks

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab, and then select **68 - Enable Follow Me**.

   When you set Follow Me, option **60 - Enable Suspend/Resume** dims, and vice versa. You cannot select both Follow Me and Suspend/Resume; they are mutually exclusive. When you set Follow Me, each workstation in the revenue center participates in the Follow Me operation.
3. Select the property, click **Setup**, and then click **Workstations**.
4. On the **General** tab, enter information in the fields as described in the following table:

Table 34-4 Workstation Timeout Settings

Timeout Setting	Description
Check Inactivity Timeout	Enter the number of seconds that the workstation waits before prompting the workstation operator to cancel a transaction. If you set this value to 0 (zero), the Cancel dialog does not appear. If you select **68 - Enable Follow Me** from the RVC Parameters module, the guest check is automatically suspended rather than cancelled.
Check Inactivity Dialog Timeout	Enter the number of seconds that the workstation shows the Do you need more time? Inactivity dialog before automatically cancelling the transaction. If you set this value to 0 (zero), the Cancel dialog does not appear.

5. Click **Save**.

Order Handling on Open Checks

This section describes how to configure the following Simphony features:

- Send and Stay: Send orders to order devices (such as remote printers or a Kitchen Display System (KDS)) when performing a Service Total while the guest check remains open
- Timed Fire: Manually or automatically send items on a guest check to order devices in groups over a period of time at preset times

Holding and Sending Items to Order Devices

The following table describes how to configure the workstation to hold and send menu items on open guest checks to order devices.

Table 34-5 Configure Workstations to Hold Items on Guest Checks

Task	More Information
Enable option to hold items on guest checks and add touchscreen buttons	Setting the Hold and Fire Option
Enable workstation notifications for held menu items when tendering	Setting the Hold and Fire Tender Notification
Configure workstations to remind workstation operators of checks with items on hold after signing into the workstation	Setting a Reminder for Items on Hold
Configure guest checks with items on hold to end current service round and add touchscreen buttons	Setting Checks with Items on Hold to End Current Service Round
Configure how to handle items on hold when closing checks	Setting Check Handling with Items on Hold when Closing Checks
(Optional) Configure Check Screen Look Up (SLU) to display checks with only held items	Configuring Check Screen Lookup (SLU) to Show Checks with only Held Items

Configuring Send and Stay

Follow these instructions to configure the Service Total to send items to be prepared while the check remains open.

1. Select the property, click **Configuration**, and then click **Tender/Media**.
2. Insert a Service Total record if it does not exist.
3. Double-click the record to open it.
4. On the **General** tab, select **2 - Service Total** from the **Key Type** drop-down list.
5. Click the **Options** tab, and then click the **Ops Behavior** subtab.
6. Select **95 - Send Order**.
7. Click **Save**.
8. Add a touchscreen button for the tender/media record that you created in Step 2. Adding a Service Total Key to the Transaction Page contains more information about configuring a service total touchscreen button.

Setting the Hold and Fire Option

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab, and then select **70 - Enable Hold and Fire**.

   Do not enable hold and fire if you are using DOM.
3. Click **Save**.

Setting the Hold and Fire Tender Notification

1. Select the revenue center, click **Setup**, and then click **Control Parameters**.
2. Click the **Options** tab, and then select **66 - Enable Hold and Fire Final Tender Notification**.

   This notification indicates that unfired menu items are on a check during the final tender process.
3. Click **Save**.

Setting a Reminder for Items on Hold

1. Select the Enterprise level, click **Setup**, and then click **Control Parameters**.
2. Click the **Configuration** tab.
3. In the **Confirm Threshold Period for Items on Hold (minutes)** field, enter the time that elapses before notifying workstation operators of checks with items on hold.

   If you set the **Confirm Threshold Period for Items on Hold (minutes)** to 0, the workstation shows a reminder each time a workstation operator signs on to the workstation.
4. Click **Save**.

Configuring Checks with Items on Hold to End Current Service Round

1. Select the property, click **Configuration**, and then click **Tender/Media**.
2. Insert a new record and name it `Hold Order`.
3. Double-click the new tender to open it.
4. On the **General** tab, select **2 - Service Total** from the **Key Type** drop-down list.
5. Click the **Options** tab, and then click the **Ops Behavior** subtab.
6. Select **2- Hold Order** from the **Hold Type** drop-down list. The Hold Type is used with Hold and Fire to establish the order device output instructions for menu items on the guest check. The following options are available.
   - **0 - Fire Order**: Sends all menu items, including items on hold, to order devices. Items that you configure to send at a preset time are exempt from this service total type.
   - **1- Keep Held Status**: Sends all items to the order device except those on hold.
   - **2- Hold Order**: Holds the entire guest check.
7. Click **Save**.
8. Repeat Steps 2 through 7 and configure service totals for **Fire Order** and **Keep Held Status**.
9. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
10. Open the Front of House touchscreen page (typically the Transaction page) on which to place the service total buttons.
11. On the Edit tab, select the page area in which to define buttons, and then click **Button**.
12. On the General subtab, select **Tender/Media** from the **Type** drop-down list.
13. Click the black arrow directly beneath the **Type** drop-down list, select **Hold Order**, and then click **OK**.
14. Position and size the button on the page, and then click **Save**.
15. Repeat Steps 11 through 14 and add touchscreen buttons for the **Fire Order** and **Keep Held Status** service total keys.

Configuring Check Handling For Closing Checks With Held Items

1. Select the property, click **Configuration**, and then click **Tender/Media**.
2. Double-click a Service Total tender record to open it.
3. Click the **Options** tab, and then click the **Ops Behavior** subtab.
4. In the **Tender Media Hold Types** section, select a **Hold Type** for each type of Service Total tender used when making a payment and closing a guest check. The following table describes the Hold Types and their affect on the workstation messages.

Table 34-6 Hold Types and Workstation Messages

Hold Type	Workstation Message When Closing a Check with Items on Hold
0 - Fire Order	Select this option to send all items on hold to the order devices. This is the default Hold Type.
1 - Keep Held Status	Select this option to show a message asking the workstation operator whether to send the items on hold to the order devices or to close the check without sending the items.
2 - Hold Order	Select this option to show a message asking the workstation operator whether to send the items on hold to the order devices or to close the check without sending the items.

5. Click **Save**.

Configuring Item Hold Buttons

To allow workstation operators to hold items on a check without sending to order devices, you need to add buttons to the touchscreen page.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the buttons, and then on the **Edit** tab, select the page area in which to define the buttons.
3. Click **Button**, and then on the **General** subtab, select **Function** from the **Type** drop-down list.
4. Click the black arrow directly beneath the **Type** drop-down list, select **Transaction** from the **Type** pane, and then select one of the following functions:
   - **Hold**: Holds the menu items selected in the check detail area.
   - **Hold Transaction**: Holds every successive menu item added to the check during the current round.
   - **Timed Fire Menu Item**: Holds selected items or an entire check until a predefined time.
   - **View Fire Times**: Shows the time each menu item is configured to send to order devices
5. Click **OK**, enter a **Legend** for the button, and then position and size the button on the page.
6. Repeat Steps 3 through 5 and configure buttons for the remaining hold functions in Step 4, and then click **Save**.

Configuring the Fire Now Button

To allow workstation operators to fire items on a check from the current service round to order devices, you need to add a Fire Now button to the touchscreen page.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Open the page on which to place the button, and then on the **Edit** tab, select the page area in which to define the button (for example, a menu item selection page).
3. Click **Button**, and then on the **General** subtab, select **Function** from the **Type** drop-down list.
4. Click the black arrow directly beneath the **Type** drop-down list, select **Fire Now** from the **Type** pane, and then select the **Service Total** configured as the Fire Now Service Total.
5. Click **OK**, enter a **Legend** for the button (for example, Fire Now), and then position and size the button on the page. The selected Tender Media's number appears in the **Arguments** field for the Fire Now function.
6. Click **Save**.

Team Service

Team Service allows assignment of more than one service personnel to a check. A team of service personnel can work together when there is a large party requiring more than one server. In some environments (usually high-end fine dining establishments), Team Service is used exclusively, regardless of the party size.

Tip and receipt totals are divided equally on the Employee Tip Report among all team members when a team check is closed. This allows resulting pay out of tips or service charges to be paid equally among the team members. As the Employee Tip Report is used for income reporting purposes for tax authorities, tax liabilities are shared equally among team members. See Reports and Totals Posting for Team Checks for more information.

Team members can access checks where they are assigned as part of the team, even if they are not the check owner. This is independent of Role option **18 - Authorize/Perform Pickup of a Check Belonging to Another Operator**.

Reports and Totals Posting for Team Checks

Team Service only affects Employee Tip Report totals. The Employee Financial Report is not impacted. When a team check is closed, all totals post as usual to the Employee Financial Report of the check operator. Totals posted to the Employee Tip Report are distributed equally among all members of the team.

The following table shows an example result from totals posting of a team check with three team members. Totals post only to the Employee Financial Report of the check owner (Employee 1) while totals are distributed equally among all team members on the Employee Tip Report.

Table 34-7 Sample Totals Posting for Team Checks

Report Name	Total	Employee 1	Employee 2	Employee 3
Employee Financial	Net Sales	$ 3000.00	$ 0	$ 0
Employee Financial	Charge Tips	$ 300.00	$ 0	$ 0
Employee Tip Report	Gross Receipts	$ 1000.00	$ 1000.00	$ 1000.00
Employee Tip Report	Charge Tips	$ 100.00	$ 100.00	$ 100.00

Totals posted to the Employee Tip Report outside of a team check, such as those from regular guest checks or employee tip declarations, are posted in the normal manner.

This reporting is visible in both Ad Hoc Reports available at the workstation and in Reporting and Analytics Reports.

Enabling Team Service

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
2. Click the **Options** tab, and then select **29 - Enable Team Service**.
3. To print the names of all team members on guest checks, select **41 - Print Team Member Names on Guest Check**.
4. Click **Save**.

Configuring Team Service Privileges

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Operations** tab, and then click the **Miscellaneous** subtab.
3. Select the appropriate privileges. The following table summarizes the privileges associated with Team Service and the recommended roles to have the privilege set:

Table 34-8 Team Service Privileges

Option Number	Privilege Name	Allows the Employee to ...
190	Authorize/Create Team	Create a team and add initial team members to it, and to authorize others to do so.
191	Authorize/Add or Delete Team Member to a Team	Add or delete members to an existing team, and to authorize others to do so.
192	Authorize/Delete a Team	Delete an existing team, and to authorize others to do so.
193	Print a list of Teams	Print a team list showing the name of the team and all assigned members, and to authorize others to do so. See also Step 5 below.
196	Available as Team Service Team Member	Appear in selection lists when assigning team member.

4. Click **Save**.
5. To print a team member list, you are also required to enable revenue center level option **7 - Validate Employee Direct/Indirect Tips Declared Transaction** in the RVC Parameters module.
   a. Select the revenue center where the team members were assigned, click **Setup**, and then click **RVC Parameters**.
   b. Click the **Options** tab.

c. Select option **7 - Validate Employee Direct/Indirect Tips Declared Transaction**.

d. Click **Save**.

e. Repeat Step 5-a through 5-d for each revenue center as needed.

Configuring Revenue Centers to Delete Service Teams at the Start of Day

You can configure Simphony to automatically remove all teams on a daily basis for locations that use Team Service as a standard of operation. As team members usually change each day based on employee scheduling and availability, this allows managers to create new teams each day without having to edit or delete previous teams.

1. Select the Enterprise or property, click **Configuration**, and then click **Task Schedules**.
2. Insert a new record, and then double-click the record to open it.
3. On the **General** tab, select **7 - Workstation** as the **Service Type**, and then select **3 - Reset Team Service** as the **Task Type**.
4. Select **4 - Recurring - Daily** as the **Schedule Type**, select **Enabled**, and then select the **Start Date**.
5. Click the **Recurrence** tab.
6. In the Daily Frequency section, set the time at which to run the task, and then click **Save**.
7. Repeat Steps 2 through 6 to create another task, but change the **Service Type** to **8 - Check and Posting**.

Adding Team Service Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Team Service buttons, and then on the Edit tab, select the page area in which to define the buttons.
3. Click **Button**, and then on the General subtab, select **Function** from the **Type** drop-down list.
4. Click the black arrow directly beneath the **Type** drop-down list, and then select **Check Begin Pickup** from the **Type** pane.
5. Select **Begin Team Check**, and then click **OK**.

   The Begin Team Check key allows workstation operators to start a team check. If the workstation operator is a member of multiple teams, the workstation shows a list of teams.
6. Enter a **Legend** for the button (for example, `Begin Team Check`), and then position and size the button on the page.
7. Click **Save**.
8. Repeat Steps 3 through 7 and add buttons for the following functions:
   - **Create Team Members or Add Team to Check**: Creates, edits, or deletes a team; adds a team to a check; and prints a team list.
   - **Edit Team**: Shows team information and allows member editing.
   - **Remove Team from Check**: Removes the team from a check.

Allowing Employees to Edit Guest Check ID on Open Check

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Operations** tab, and then click the **Guest Checks** subtab.
3. To set permission to edit the check ID, select **81 - Authorize/Perform Edit of Guest Check ID In an Open Check**.
4. Click **Save**.

Closed Guest Check Operations

After a check is closed, you can allow workstation operators to perform these operations:

- **Adjust Closed Check**: Change or add a tip, tender, or guest count to a closed check without reopening it.
- **Reopen Closed Check**: Reopen the check and use as a regular guest check. All menu items from the check are considered previous-round items.
- **Reprint Closed Check**: Reprint checks for a closed transaction in the current or previous business dates.
- **Reprint Previous Closed Check**: Reprint a receipt for the last closed check.

> **Note:**
>
> If workstation operators are allowed to reopen, adjust, or void closed checks, be aware of the following RVC Parameters options settings and their effect on the Check Count value on reports:
>
> - Whether RVC Parameters option **73 - Keep The Same Check Number When a Closed Check is Voided** is enabled or not has no impact on the Check Count value on reports.
> - When RVC Parameters Posting option **5 - Zero or Negative Transactions Do Not Add to Guest or Guest Check Counts** is enabled and a workstation operator closes a check with a 0.00 or negative amount, the Check Count value does not increment and remains the same value on reports.
> - When RVC Parameters Posting option **5 - Zero or Negative Transactions Do Not Add to Guest or Guest Check Counts** is enabled, when a workstation operator performs the Reopen Closed Check or Void Closed Check functions on a closed check, the Check Count value remains the same value on reports.
> - When a workstation operator initially closes a check with a positive amount, the Check Count value has already incremented to **1**, so when a workstation operator performs the Void Closed Check function on the same check, the Check Count value remains the same on reports.

Configuring Closed Check Settings

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
2. Click the **Configuration** tab, and then enter information in the following fields:
   - **Number of Days to Adjust Closed Checks**: Enter the number of days (0-14) a privileged employee can adjust closed checks. Enter **0** to allow the adjustment for the current business day only.
   - **Number of Days to Reopen/Reprint Closed Check from Previous Business Day**: Enter the number of days (0-14) a privileged employee can reopen or reprint closed checks. Enter **0** to allow checks from the current business day only to be reopened or reprinted.
3. To allow privileged operators to service total reopened checks, click the **Options** tab, and then select **31 - Allow Service Total of Closed Checks**.
4. To allow the cash drawer to open when there is a tender on the closed check and the workstation operator performs a **Void Closed Check** or **Void Closed Check From List** function, select **74 - Allow open of Cash Drawer when voiding a tender on a closed check**.
5. Click **Save**.
6. To retain the original guest check number when reopening a closed check and voiding menu items:
   a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
   b. Click the **Options** tab, and then select **73 - Keep The Same Check Number When a Closed Check is Voided**.

      If deselected, Simphony assigns a new guest check number to the closed check when reopened and voided.
   c. Click **Save**.
7. To configure reprinting of closed checks:
   a. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
   b. Insert a Service Total tender record if it does not exist.
   c. Double-click the Service Total record to open it.
   d. On the **General** tab, select **2 - Service Total** as the **Key Type**.
   e. Click the **Options** tab, and then click the **Printing Options** subtab.
   f. Select **19 - Reprint Check**.

      Setting option **19** does not print an exact copy of the receipt unless the printing options are the same as the original tender.

      You can enable other options to include elements of the check, such as **21 - Print Summary Totals** or **22 - Print Check Trailer**, but selecting these options is not required.
   g. Click **Save**.
   h. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Tender Parameters**.

i. Click the **Configuration** tab, and then in the **Default Reprint Check Tender/Media** drop-down list, select the Service Total tender from step 6-b.

j. Click **Save**.

Allowing Employees to Adjust Closed Checks

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Operations** tab, click the **Guest Checks** subtab, and then select the appropriate options:
   - **67 - Authorize/Perform Adjust Closed Check**: Select to allow employees with this role to use the Adjust Closed Check function key, and to authorize others to do so. A closed check adjustment allows the user (if privileged to void Tender/Media from a previous round) to adjust the tender/media, charge tip, or the number of guests on a closed check.
   - **133 - Auth/Perform Adjust Closed Check from Previous Business Days**: Select to allow employees with this role to adjust closed checks from previous business days.
3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
5. Open the page on which to place the Adjust Closed Check buttons.
6. On the **Edit** tab, select the page area in which to define the buttons.
7. Click **Button**, and then on the General subtab, select **Function** from the **Type** drop-down list.
8. Click the black arrow directly beneath the **Type** drop-down list, and then select **Check Begin Pickup** from the **Type** pane.
9. Select the appropriate function key, and then click **OK**.
   - **Adjust Closed Check**: Prompts for the check number of the closed check to adjust.
   - **Adjust Closed Check From List**: Prompts to select a closed check to adjust from a list of checks for the current business day.

   When adjusting a check using either function key, workstation operators can edit tenders, charge tips, and the number of guests on the check, but the check itself is not reopened.
10. Enter a **Legend** for the button, and then position and size the button on the page.
11. (Optional) Repeat Steps 7 through 10 and configure a button for the remaining Adjust Closed Check function in Step 9, and then click **Save**.

Allowing Employees to Reopen and Edit a Closed Check

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Operations** tab, click the **Guest Checks** subtab, and then select the appropriate options:
   - **68 - Authorize/Perform Reopen Closed Check**: Select to allow employees with this role to use the Reopen Closed Check key, and to authorize others to do so.
   - **134 - Auth/Perform Reopen Closed Check from Previous Business Days**: Select to allow employees with this role to reopen closed checks from previous business days.

3. Click the **Voids/Returns** subtab, and then select the appropriate options:
   - **69 - Authorize/Perform Void of Menu Items on Closed Checks**: Select to allow employees with this role to void menu items from closed checks after they have been reopened, and to authorize others to do so. You must also select Roles option **25 - Authorize/Perform Void of Menu Items from a Previous Round**.
   - **70 - Authorize/Perform Void of Discounts on Closed Checks**: Select to allow employees with this role to void discounts from closed checks after they have been reopened, and to authorize others to do so. You must also select Roles option **27 - Authorize/Perform Void of Discounts from a Previous Round**.
   - **71 - Authorize/Perform Void of Service Charges on Closed Checks**: Select to allow employees with this role to void service charges from closed checks after they have been reopened, and to authorize others to do so. You must also select Roles option **28 - Authorize/Perform Void of Service Charges from a Previous Round**.
4. Click **Save**.
5. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
6. Open the page on which to place the Reopen Closed Check buttons.
7. On the **Edit** tab, select the page area in which to define the buttons.
8. Click **Button**, and then on the **General** subtab, select **Function** from the **Type** drop-down list.
9. Click the black arrow directly beneath the **Type** drop-down list, and then select **Check Begin Pickup** from the **Type** pane.
10. Select the appropriate function key, and then click **OK**.
    - **Reopen Closed Check**: Prompts for the check number of the closed check to reopen.
    - **Reopen Closed Check From List**: Reopens the closed checks selected from a list of closed checks available on the current workstation.
11. Enter a **Legend** for the button, and then position and size the button on the page.
12. Repeat Steps 8 through 11 to create a button for the remaining Reopen Closed Check function in Step 10, and then click **Save**.

Allowing Employees to Reprint Closed Checks

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type, click the **Operations** tab, click the **Printing** subtab, and then select the appropriate options:

Table 34-9 Check Reprinting Options

Option	Description
23 - Authorize/Perform Unlimited Reprinting/ Printing of a Check	Select to allow employees associated with this role to perform two functions: a. Allow On-Demand operators to print more guest checks than the maximum number allowed. b. Allow By-Round operators to use the Reprint Closed Check key. Selecting this option also allows employees to grant authorization to others for these functions.
24 - Authorize/Perform Reprinting of Closed Checks	Select to allow employees with this role to reprint a closed guest checks and to authorize others to do so.

3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
5. Open the Front of House page on which to place the Reprint Closed Check buttons.
6. On the **Edit** tab, select the page area in which to define button.
7. Click **Button**, and then on the General subtab, select **Function** from the Type drop-down list.
8. Click the black arrow directly beneath the **Type** drop-down list, and then select **Print** from the **Type** pane.
9. Select **Reprint Closed Check**, and then click **OK**.

   When this function key is used, the Default Reprint Check Tender assigned in Tender Parameters is used to print the check.
10. Enter a **Legend** for the button, and then position and size the button on the page.
11. Repeat steps 7 through 10 to create a **Reprint Previous Closed Check** button.

    This function key is used to reprint a receipt for the last closed check.
12. Click **Save**.

Allowing Employees to Manually Replay Checks Through the Workstation

Beginning with Simphony version 2.9.2, you must grant employees permission to manually replay offline checks through the Property Management Console (PMC), if an offline POS workstation fails to automatically replay its checks before reconnecting online.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type record (for example, administrator or manager).
3. Click the **Operations** tab, and then click the **PMC General/Reports** subtab.
4. Select **30001 - Run PMC** to allow employees associated with this role to launch the PMC on workstations using the **Launch PMC** function key.

5. Click the **PMC Procedures** subtab, and then select **30069 - Replay Checks** from the Other Procedure Options section.
6. Click **Save**.

Check Add/Transfer

Transferring checks is a procedure that changes ownership of a guest check. Simphony enables privileged workstation operators to transfer checks from another server to themselves by employee number or by employee ID number. Guest checks may also be transferred across Revenue Centers. The Transfer Checks function only transfers the ownership of the guest check; it does not transfer the check's sales totals for reporting purposes.

Add Check means to combine two checks together while in a transaction.

Allowing Employees to Add or Transfer Checks

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type record (for example, administrator, manager or server).
3. Click the **Operations** tab, and then click the **Guest Checks** subtab.
4. Select the appropriate permission options for the user role:
   - **45 - Authorize Transfer of Checks in the Same Revenue Center**: Select to allow employees with this role to transfer checks from another operator within the same revenue center, and to authorize others to do so.
   - **46 - Authorize Transfer of Checks Between Revenue Centers**: Select to allow employees with this role to transfer checks from another revenue center, and to authorize others to do so.
   - **47 - Authorize Adding of Checks in the Same Revenue Center**: Select to allow employees with this role to add checks (to be in a check, and add another check to it) within a revenue center, and to authorize others to do so.
   - **48 - Authorize Adding of Checks Between Revenue Centers**: Select to allow employees with this role to add checks (to be in a check, and add another check to it) from another revenue center, and to authorize others to do so.
5. Click **Save**.

Configuring the Add/Transfer Revenue Centers

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. On the General tab, scroll down to the Add/Transfer Revenue Center section, and then select up to eight revenue centers from which checks can be transferred into this revenue center.
3. Click **Save**.
4. Repeat Steps 1 through 3 for all revenue centers in the property.

Configuring Add/Transfer Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Open the page on which to place the Add/Transfer buttons.
3. Click the **Edit** tab, and then select the page area in which to define the buttons.
4. Click **Button**, and then on the **General** subtab, select **Function** from the **Type** drop-down list.
5. Click the black arrow directly beneath the **Type** drop-down list, select **Check Add** from the **Type** pane.
6. Select one of the following function keys, and then click **OK**:
   - **Add/Transfer by Number**: Adds or transfers a check within the same revenue center using the check number entered.
   - **Add/Transfer Check by Number RVC Index**: Adds or transfers a check (using the check number) from the revenue center specified in the Index field. The Index field points to one of the eight revenue centers configured in the Add/Transfer section of the RVC Parameters module.
   - **Add/Transfer Check by Number Prompt RVC**: Adds or transfers a check (using the check number) from one of the eight add/transfer revenue centers configured in the RVC Parameters module.
   - **Add/Transfer Check by Table**: Adds or transfers a check within a revenue center. The workstation client prompts for the table number or table ID of the check to be added or transferred.
   - **Add/Transfer Check by Table RVC Index**: Adds or transfers a check (using the table number or table ID) from the revenue center specified in the Index field. The Index field points to one of the eight revenue centers configured in the add/transfer section of the RVC Parameters module.
   - **Add/Transfer Check by Table Prompt RVC**: Adds or transfers a check (using the table number or table ID) from one of the eight add/transfer revenue centers configured in the RVC Parameters module.
   - **Add/Transfer Check From List Prompt RVC**: Prompts users for the revenue center, and then shows all open checks that can be added or transferred from others within the specified revenue center.
   - **Add/Transfer Check From List RVC Index**: Shows all open checks in the revenue center (specified by the Index field) that can be added or transferred from others. The Index field points to one of the eight revenue centers configured in the Add/Transfer section of the RVC Parameters module.
   - **Add/Transfer Check SLU**: Shows a list of checks that can be added or transferred from other workstation operators on the Open Check SLU.
7. Enter a **Legend** for the button, and then position and size the button on the page.
8. Repeat Steps 4 through 7 to create buttons as needed for the remaining Add/Transfer functions in Step 6.
9. Click **Save**.

Seat Filtering and Memo Checks

You can configure check filtering by one or more seat numbers, allow workstation operators to apply a tender only for the detail and summary totals associated with the seat, and if required, allow workstation operators to create a check for the filtered seats. This enables workstation operators to:

- Review check detail posting to facilitate the delivery of meals to the proper guest

- Print checks for one or more seats, or for groups of seats in a large party without creating separate checks

For example, a party of four arrives at the restaurant. A workstation operator begins a check for the table, assigning a seat number to each order. When the party has completed the dining experience, guests at seats 1 and 2 want to pay and leave before the guests at seats 3 and 4. The workstation operator can:

1. Filter the check by seats 1 and 2.
2. Apply a tender and close the check for the filtered seats.
3. If configured, print a memo check.
4. Close the check by tendering the remaining seats.

After applying a tender to a filtered check, items belonging to the filtered seat or seats are removed from the primary guest check.

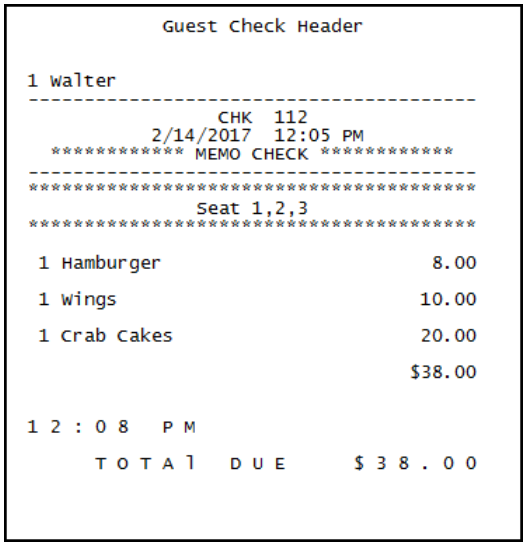
The check for the filtered seats is referred to as a memo check. After closing a memo check, depending on the configuration, the active seat in the filter increments to the next seat number, and menu items associated with that seat appear in the check detail area. A memo tendered check contains the same information as the primary check when closed, such as service team details, event details, and suite owner details.

Workstation operators can identify memo checks on the Check Journal Report by the MEMO CHECK banner on the check header and in ad-hoc reports, as well as on the printed check.

Figure 34-4 Sample Check Filtered by Seats



Figure 34-5 Sample Printed Memo Check



If a workstation operator prints a memo check before applying a tender to the filtered seats, the memo check prints with the check number of the primary check. If a workstation operator prints a memo check after applying a tender and closing the check, a new check number is assigned to the check that is closed. This check numbering continues until the last items on the check are tendered, which closes the primary check and retains the number.

Applying Discounts on Memo Checks

Workstation operators can apply manual discounts to a memo check.

- If one seat is in the active seat filter, the manual discount is applied to the seat that is filtered, and the indicator next to the discount shows the seat number in the check detail.
- If multiple seats are in the active seat filter, the manual discount is applied to all seats that are in the seat filter, but not on the remaining items on the primary check. The indicator next to the discount shows the letter F in the check detail as the discount is applied to multiple seats.
- If there is no active seat filter, the manual discount is applied to the entire check. There is no indicator next to the discount in the check detail.

If an automatic or coupon discount is applied to the primary check, Simphony recalculates the discount when the check is filtered by seats. That is, Simphony applies the automatic or coupon discount to the memo check only if the menu items for the filtered seats are eligible for the discount.

Performing Operations on a Memo Check

The following conditions apply when performing operations on a memo check:

- When the check is filtered by multiple seats, new menu items, discounts, and service charges are added to the lowest seat number.
- Workstation operators cannot perform the following functions when a seat filter is active:
  - Fire Now
  - Next #/Next Seat
  - Touch Split

  - Begin Check
  - Pick Up Check
  - Transfer Check
- Simphony supports assigning up to 65 seats to a check.

Performing Memo Tenders When Using a Kitchen Display System (KDS)

The following conditions apply to the KDS when performing a memo tender:

- KDS Reports and report drill downs do not account for memo tendered or split checks in check counts, timings, and check detail.
- Check modifications such as adding new menu items to a check, adding or editing condiments, and the voiding of existing menu items are not allowed when the following Dynamic Order Mode (DOM) types are enabled:
  - Fire on Fly
  - Fire on Next
  - Fire on Tender

Configuring Memo Check Printing

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/ Media**.
2. Insert a new record, name it `Print Memo Check`, and then click **OK**.
3. Double-click the **Print Memo Check** record to open it.
4. From the **Key Type** drop-down list, select **2 - Service Total**.
5. Click the **Options** tab, click the **Printing Options** subtab, and then select the following options:
   - **13 - Print Memo Check**: Select to allow this key to print memo checks.
   - (Optional) **15 - Increment Active Seat # after Memo Check Print**: Select to increment the active seat number on the seat filter or active memo check number to the next number each time this key is used to print. This allows workstation operators to, in succession, generate Memo Checks or to apply Memo Tenders. When this option is selected, pop-up operators remain signed in when the seat filter is reset. Deselect to reset the seat filter when this key is used to print.

   Select **13** and (optionally) **15** for all tender medias that can be used for Memo Tendering.
6. Click **Save**.
7. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design.**
8. Open the page on which to place the memo check button.
9. On the **Edit** tab, select the page area in which to define the buttons.
10. Click **Button**, and then on the General subtab, select **Tender/Media** from the **Type** drop-down list.
11. Click the black arrow beneath the **Type** drop-down list, select **Print Memo Check** from the list and then click **OK**.
12. Enter a **Legend** for the button (for example, Print Memo Check), and then position and size the button on the page.

13. Click **Save**.
14. (Optional) To prompt for the guest count for memo checks:
    a. Select the Enterprise, property, revenue center, or zone, click the **Setup** tab, and then click **Control Parameters**.
    b. Click the **Options** tab, and then select **9 - Prompt for Guest Count when Split Check**.

Configuring Service Charges for Seat Filtering

When a check is filtered by seats, automatic service charges prorate based on the active menu items. Manual service charges do not prorate when seat filtering is active. Instead, the manual service charge is added to the last memo check that is closed for the table. To set manual service charges to prorate based on the filtered seats:

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
2. Insert a record for either an automatic or a manual amount service charge with prorate option, or double-click an existing automatic or manual service charge record to open it.
3. On the **General** tab, select option **2 - On = Amount; Off = Percentage**, and then enter the service charge value in the **Amount** field under General Settings.
4. If required for your country, select the **Tax Class** from the drop-down list.
5. Select option **30 - Prorate Service Charges to Menu Items**.

   When selected, the service charge prorates based on the value of the menu items in the filtered seats. This overrides the requirement for the minimum number of guest count for a memo check, if the minimum guest count requirement is met for the entire check.
6. If you are configuring a manual amount service charge with prorate option, complete the following substeps to prorate to all menu items with corresponding service charge itemizers:
   a. Click the **Itemizers** tab, and then select all service charge itemizers.
   b. Click the **Menu Levels** tab, and then select the appropriate Main and Sub Levels.
7. Click the **Output** tab, and then select **Print on Customer Receipt**, **Print on Journal**, and **Print on Guest Check**.
8. Click **Save**.

Configuring Seat Filter Management Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design.**
2. Open the page on which to place the memo check button.
3. On the **Edit** tab, select the page area in which to define the buttons.
4. Click **Button**, and then on the General subtab, select **Function** from the **Type** drop-down list.
5. Click the black arrow beneath the **Type** drop-down list, and then select **Guest Seat** from the **Type** pane.
6. Select one of the following function keys, and then click **OK**:

- **Manage Seat Filter**: A pop-up screen appears showing all available seats on the guest check, and lets you add or remove seats interactively from the seat filter.
- **Add to Seat Filter**: Prompts you for a seat number that is to be filtered (if no seat filter is active), or adds the seat number to an active seat filter.
- **Remove From Seat Filter**: Prompts you for the seat number that you want to remove from the current seat filter.
- **Clear Seat Filter**: Removes all seats from the current seat filter.
- **Edit Seat**: Allows you to change the seat number of previously ordered menu items.

7. Enter a **Legend** for the button, and then position and size the button on the page.
8. Repeat Steps 3 through 6 and create buttons for the remaining functions in Step 6.
9. Click **Save**.

35

Workstation Touchscreen Pages

A touchscreen page is a defined layout of functions and buttons that you configure in the EMC. The touchscreen page appears on the workstation, allowing workstation operators to perform operations and transactions on the POS client.

Page templates allow you to customize a workstation touchscreen page in various ways. Page templates are categorized into the following types:

- Classic templates: These templates are similar to Simphony First Edition touchscreen templates
- Blank templates: These templates are used for customized pages or a Sign On page
- Tabbed templates: These templates are used for Sign On and Transaction pages

Tabbed templates allow the greatest functionality. With a tabbed template, you can configure multiple tabs on the page. Approximately 50 tabs and subtabs can appear on a page, and each tab and subtab contain up to 50 buttons. Having a large number of buttons on a single page allows you to configure a small number of pages for a revenue center. A tab is used for navigation. Navigation on a page is consistent from page to page (navigation bar and subtabs).

Pages can contain buttons and more sophisticated content, such as dining tables, Screen Lookups (SLUs), numeric entry areas, and background panels for highlighted groups of controls. All buttons performs a function.

The content appearing on a page can be dynamic based on the menu levels, serving period, employee class, or other criteria. For example, you can show a Manager Functions tab only if the manager is assigned to one of three manager employee classes.

When editing pages from the Page Design module, what-you-see-is-what-you-get.

Page Design

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The content appearing on a page can be dynamic based on the menu levels, serving period, employee class, or other criteria. For example, you can show a Manager Functions tab only if the manager is assigned to one of three manager employee classes.

When editing pages from the Page Design module, what-you-see-is-what-you-get.

Assigning Default Touchscreen Pages

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Assignment**.
2. Click the **Configuration** tab, and then configure the following settings:
   - **Default Sign In Page**: Select the page to show when workstation operators are not signed on to a workstation.
   - **Default Transaction Page**: Select the page to show for workstation operators who sign on to this location when a transaction page is not defined (through operator, Employee Class, and so on).
   - **Default Training Page**: Select the page to show for workstation operators in training mode. If you select **0 - None**, employees in training mode see the default touchscreen based on the touchscreen hierarchy.
3. Click **Save**.

Configuring a Custom Page Template

Custom page templates allow users to be flexible when configuring custom pages in the Page Design module. The following steps describe how to create and configure a custom page template:

1. In EMC, at the Enterprise level, navigate to the **Setup** tab and then click **Page Templates** in the **Custom Content** section.
2. Create a new page template record, import the appropriate template file, and then click **Save**.
3. Navigate back to the Page Templates list, click the **...** button in the options tab of the newly created template.
4. Select option **1 – Can Be Edited “In Template”** and then click **OK**.
5. Click **Save**.
6. At the Enterprise level, navigate to the **Configuration** tab and then click **Page Design** in the **User Interface** section.
7. Create a new page, and then select the page template you created in steps 2-5 from the **Database Templates** tab.
8. The custom page template now displays in the Page Design module and can be edited.

Configuring Function Keys

Function keys allow workstation operators to perform a variety of tasks, such as beginning a guest check, opening a cash drawer, authorizing a credit card, transferring checks, printing customer receipts, and many other operations.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place a function key.
3. On the **Edit** tab, select the page area in which to define the function key.
4. Click **Button**.
5. On the **General** subtab, enter the key name in the **Legend** field.
6. From the **Type** drop-down list, select **Function**.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select the appropriate function, and then click **OK**.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. Click **Save**.

Configuring Macros

A macro is a button that, when pressed, executes a series of commands. Macros save time when workstation operators frequently enter certain sequences or keystrokes. You can set macros to include menu items, service charges, discounts, tenders, function keys, alphanumeric keys, or a link to another macro.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the macro button.
3. On the **Edit** tab, select the page area in which to define the macro button.
4. Click **Button** to add a button.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. From the **Type** drop-down list, select **Function**.
7. Click the black arrow directly beneath the **Type** drop-down list, select the **Macro** function, and then click **OK**.
8. Click the **Edit Macro Keys** button, and then add the appropriate steps in the proper sequence.
9. Highlight the macro button.
10. Position and size the button on the page. Use the Style arrow to change the color.
11. Click **Save**.

Configuring a Smart Key on a Workstation

For Enterprise Cash Management users, a smart key prevents the use of a workstation until you assign a till session to a cash drawer on the workstation. After assignment, the key permits

the workstation operator to sign on to the workstation. Follow these steps to implement the optional smart key.

1. Select the Enterprise, zone, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Select the **Sign In** page.
3. On the **Edit** tab, click **Button**.
4. Enter information in the Page Design fields.

Table 35-1 Page Design Edit Fields

Field	Entry
Legend	Enter the name of the button (for example, Till Status).
Type	Select **Function** from the drop-down list.
Sub Type	Click the black arrow, and then select **Smart Key**.
Auto Active	Select this option to make the button automatically active.

5. Click the **Edit Smart Keys** button.
6. Click **Add**.
7. Enter information in the fields as described in the following table for Smart Key entry number 1.

Table 35-2 Smart Key 1 Fields

Field	Entry
Condition	Select **Till Assigned** from the drop-down list.
Value	Enter **1**.
Legend	Enter the name of the button (for example, Sign In).
Type	Select **Function** from the drop-down list.
Sub Type	Click the black arrow, and then select **Sign-In**.

8. Click **Add**.
9. Enter information in the fields as described in the following table for Smart Key entry number 2.

Table 35-3 Smart Key 2 Fields

Field	Entry
Condition	Select **Default** from the drop-down list.
Value	Enter **2**.
Legend	Enter the name of the button (for example, Assign Till).
Type	Select **Function** from the drop-down list.

Table 35-3 (Cont.) Smart Key 2 Fields

Field	Entry
Sub Type	Click the black arrow, and then select **Assign Till To Cash Drawer**.

10. Click **Close**.
11. Click **Save**.

36
Rental Deposits

Rental deposits are used in Simphony to record advance payments on scheduled events, such as banquets, parties, room rentals, or as a security deposit on loaned items, such as bowling shoes. The Rental Deposits feature allows workstation operators to accept, apply, record, report, and refund rental deposits taken at the POS client.

A rental deposit can be a menu item or a non-revenue service charge. Unlike traditional non-revenue service charges, a check can contain more than one rental deposit.

Automatic discounts are not applied to rental menu items as the discount amount can change when other items are added to the check.

Configuring Deposits as a Menu Item

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Insert a new record for the rental item (for example, Bike Rental or Bowling Shoes).
3. Double-click the new record to open it, and then click the **Options** tab.
4. Select **64 - Rental Deposit**, and then click **Save**.

   Enabling this option makes all menu items assigned to this class Rental Deposits. You can use this option with the Deposit Handling feature to apply a deposit to a check.
5. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Maintenance**.
6. Insert a new record and name it the same as the rental item.
7. Double-click the new record to open it, insert a definition record, and then click the **General** tab.
8. From **Menu Item Class**, select the class that you created in Step 2, and then click **Save**.
9. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
10. On the **General** tab, select the rental item that you created in Step 6 from the **Deposit Forfeit Return Item (Menu Item)** drop-down list, and then click **Save**.
11. Add a button for the rental item to the workstation Transaction page. See Adding Menu Item Keys to the Transaction Page for instructions.

Configuring Deposits as a Service Charge

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Menu Item Classes**.
2. Insert a new record for the rental service charge (for example, Banquet Service Charge or Conference Room Rental Service Charge).
3. Double-click the new record to open it, and then click the **Options** tab.
4. Select **64 - Rental Deposit**, and then click **Save**.

5. Select the Enterprise or property, click **Configuration**, and then click **Service Charges**.
6. Insert a new record and name it the same as the rental service charge.
7. Double-click the new record to open it.
8. On the **General** tab, select **23 - Rental Deposit**, and then configure the following settings:
   - **1 - On = Open; Off = Preset**: Select to make the rental deposit service charge an open service charge, prompting workstation operators for the amount or percentage. Deselect to use a preset amount or preset percentage for the rental deposit service charge.
   - **2 - On = Amount; Off = Percentage**: Select to make the rental deposit service charge an amount service charge. Deselect to make the rental deposit service charge a percentage service charge.
9. Click **Save**.
10. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
11. Click the **Options** tab, and then select **67 - Use Service Charge as Deposit Forfeit Return Item**.
12. Click the **General** tab, and then select the service charge that you created in Step 6 from the **Deposit Forfeit Return Item (Service Charge)** drop-down list.
13. Click **Save**.

Configuring Rental Deposit Buttons

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Rental Deposit buttons.
3. Click the **Edit** tab, and then select the page area in which to define the buttons.
4. Click **Button**, and then on the General subtab, select **Function** from the **Type** drop-down list.
5. Click the black arrow directly beneath the **Type** drop-down list, select **Transaction** from the **Type** pane.
6. Select one of the following function keys, and then click **OK**:
   - **Apply Deposit**: Applies a deposit to an active guest check containing a rental deposit.
   - **Edit Deposit**: Modifies information for the current or future rounds for a deposit in the check detail area.
   - **Show Deposit**: Refunds a deposit on a closed check, or prints a rental deposit report for all deposits or a selected deposit.

   > **Note:**
   >
   > When a Partial Refund is applied, references to the deposit no longer appear on the Rental Apply Deposit screen. Refunds can only be applied once.

7. Enter a **Legend** for the button, and then position and size the button on the page.
8. Repeat Steps 4 through 7 to create buttons for the remaining Rental Deposit functions in Step 6.

9. Click **Save**.
10. If you configured a deposit as a service charge, add a button for the Deposits service charge to the transaction page. Creating Service Charge Buttons contains instructions.

37
Resetting Daily Totals

A business day refers to the beginning and end times of a day of business. A business day can have any begin time, but typically a business day starts in the early morning hours during a slow or closed period of operations (for example, 3:00 a.m. or 4:00 a.m.). A calendar day always begins at 12:00 a.m.

The Start of Day (SOD) can be configured to run manually or automatically from the property. If the SOD is configured from the property level, all of its associated revenue centers have their totals resets occur at the same configured time.

The SOD daily totals reset can be configured to be automatically run after 12:00 noon, but before 12:00 (00:00) midnight, using the system's current business date. This configuration method for resetting daily totals must be set to run automatically and is not supported to be run manually.

To reset daily check and employee totals, a property or revenue center must start a new business day.

Start of Day

Start of Day (SOD) is the process that begins a new business day at a property or revenue center. The SOD can be set to run automatically or manually.

When the time of day occurs that a new business day is automatically configured to start (for example, at 4:00 a.m. each day), the following actions occur in the order listed:

- Simphony increases the Business Date and updates the status of checks and employees.
- The PC Autosequence runs, and typically performs the following actions:
  - Batches and settles credit cards
  - Runs custom applications for a property
- After the SOD Autosequence completes, Simphony checks to see whether it is time to run other autosequences (such as Start of Week Autosequence, Start of Pay Period Autosequence, and so on).

Many properties like to start a new business day manually at their own time (after a night auditor balances reports). Often these properties stop their Simphony and property management systems at the same time, increment to a new business date, and then bring the systems back up. An administrator can manually run SOD in Simphony using an interaction called PC Autosequence (from the EMC) or by pressing a button on the workstation. When SOD begins manually, Simphony performs the same actions as if it were run automatically. The only difference is the method by which SOD begins.

Start of Day Business Rules

Simphony has business rules to determine how and when a business day can begin, and which business day is beginning. The rules exist for both automatic and manual Start of Day (SOD).

The **Set Business Date equal to Calendar Date if Start of Day configured between 12:00 PM and Midnight** option allows you to configure the SOD to set the business date to the current date if the SOD is configured to run automatically after 12:00 noon and before 12:00 (00:00) midnight. If this option is not enabled, the legacy SOD behavior remains unchanged.

If the **Set Business Date equal to Calendar Date if Start of Day configured between 12:00 PM and Midnight** option is enabled when starting a new business day, the following rules apply:

- SOD cannot be run twice within 8 hours.
- SOD cannot be run twice between midnight and the <configurable time>.
- SOD cannot be run twice between the <configurable time> and midnight.
- When a business day is scheduled to run automatically, it is not possible to start the business day manually with a PC Autosequence.
- A business date is calculated based upon the <configurable time> to <configurable time>.

Prior to the Simphony 19.3.3.4 release, a business day is calculated based on 12:00 p.m. noon to noon times by default.

- If SOD is run before noon, Simphony assumes the business day completed is for the previous calendar day. For example, if the SOD runs at 3:05 a.m. on the 17th, the 16th is the business day that is closing, and the 17th is the business day being started.
- If SOD is run after noon, Simphony assumes the business day completed is for the current calendar day. For example, if the SOD is run at 11:52 p.m. on the 17th, the 17th is the business day that is closing, and the 18th is the business day being started.

With the Simphony 19.3.3.4 release and later, the **Set Business Date equal to Calendar Date if Start of Day configured between 12:00 PM and Midnight** option behaves as follows:

- **If enabled:** When SOD runs between <configurable> time (must be configured to run after 12:00 noon) and 12:00 midnight (00:00), the business date is set to the system's current calendar date.
- **If disabled:** The system exhibits the legacy totals reset behavior, where the <configurable> time initiates the SOD and the business date is incremented to the next calendar date.

See *Configuring an Automatic Start of Day* for more information.

Start of Day with Offline Workstations or Server

Workstations are aware of the business date configuration so that offline reports show relevant information. Consider the following scenario:

- Every business day begins at 3:00 p.m.
- On Tuesday at approximately 11:00 a.m., a property loses communication with the database (the property is in Yellow Mode).
- The site is offline until Friday afternoon.

In this situation, workstations run reports as if SOD occurred. For example, a report taken for today on Wednesday at 4:00 p.m, shows data from Wednesday at 3:00 a.m. (the time SOD would have occurred) to the current second when the report was taken. In addition, if days are configured for manual SOD, workstation reports assume that the business day begins 24 hours after the previous SOD occurred. In this situation, a dialog box appears on workstations informing the manager that a new business day has begun.

Catch-Up mode increases the business day after the Simphony server goes offline during an automatically scheduled SOD time period. Consider the following scenario:

- SOD is set to run automatically at 4:00 a.m.
- At 2:00 a.m., the Simphony server experiences a power failure.
- At 6:00 a.m., the Simphony server is online again.

In Catch-Up mode, the SOD Autosequence does not start. With Catch-Up mode, the business day still starts at 4:00 a.m. When Simphony comes online at 6:00 a.m., the PERIOD_INSTANCE table is populated with rows to indicate that the business day started. The rows do not show a 6:00 a.m. run time, however. Catch-Up mode knows that the application was supposed to have started at 4:00 a.m., so the rows are created with 4:00 a.m. as the start time. Simphony can catch-up from up to two missed automatic start of days and make the appropriate PERIOD_INSTANCE entries.

Configuring a Manual Start of Day

> **Important:**
>
> When utilizing the manual Start of Day (SOD) system reset methodology, it is incumbent on users to remain diligent and careful about not forgetting to run the SOD for every business date. Failing to do so could result in combining sales totals for multiple days of business on financial reports.

1. From the EMC, select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type (such as manager), click the **Operations** tab, and then click the **PMC Procedures** subtab.
3. Select the appropriate SOD role privileges:
   - **30058 - Run Start of Day from OPS**: Select this option to allow all employees with the role to increment the business date from the property's Check and Posting Service (CAPS) workstation.
   - **30059 - Prevent Running SOD from OPS with Open Checks**: Select this option so that Start of Day (SOD) cannot run when open checks exist.
4. Click **Save**.
5. To allow a manager or administrator to manually run SOD from a workstation, select the Enterprise, property, or revenue center, click **Configuration** , and then click **Page Design**. Otherwise, skip to Step 14.
6. Select the page on which to place the **Start of Day** button.

   The **Start of Day** button allows a manager or administrator to manually run the Start of Day on a workstation.
7. Add a Start of Day button for POS workstations from the Page Design module:
   a. In the **Legend** field, enter **Run Start of Day**.
   b. From the **Type** drop-down list, select **Function**.
   c. Click the arrow beneath the **Type** drop-down list, and then select **Start of Day**.
   d. Position and size the new button on the page.
8. Click **Save**.

9. Select the property, click **Setup**, and then click **Property Parameters**.
10. Click the **Options** tab.
11. To allow a manager or administrator to manually run SOD from a workstation, select **48 - Run Start of Day from OPS**.
12. Click the **Calendar** tab.
13. Select **Run Manually** for each day of the week.
14. In the **Manual SOD Safety catch time** field, set the time when the application automatically increments the business date if someone forgets to manually run SOD.

    The application checks to see whether SOD occurred within a 24-hour period for the selected property. This time is based on the time zone of the property.
15. Click **Save**.
16. Select the Enterprise level, click **Configuration**, and then click **PC Autosequences**.
17. Insert a PC Autosequence record and name it **Increment Business Day**.
18. Open the record, and then select the **Allowed Properties** to view the autosequence.
19. (Optional) Add **Parameters** as appropriate. For example, you can enter a property number and exclude a revenue center number.
20. On the **Steps** tab, add a step, and then from the **Step Type** drop-down list, select **3 - Increment Business Date**.
21. Click **Save**.

Start of Day Configuration for a Revenue Center

Configuring a SOD totals reset for a revenue center is similar to configuring it for a property.

1. From the EMC, select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Calendar** tab.

   To run the SOD for this revenue center manually:
3. Enable the **Run Manually** checkboxes for each day you want to manually execute the SOD.
4. Click **Save**.

> **Note:**
>
> The **Set Business Date equal to Calendar Date if Start of Day configured between 12:00 PM and Midnight** option is not supported for SOD's which are manually executed.

Configuring an Automatic Start of Day

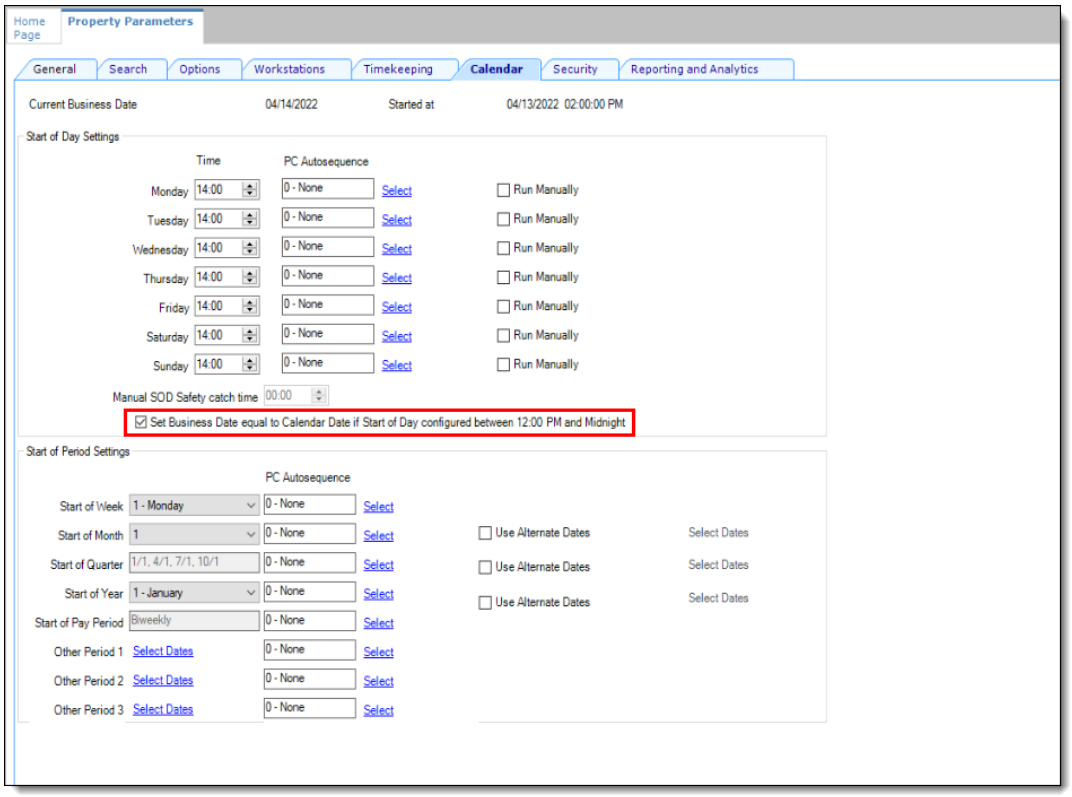
1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type (such as a system administrator), click the **Operations** tab, and then click the **PMC Procedures** subtab.
3. Determine and configure the appropriate Start of Day (SOD) role privilege for the property:

30059 - Prevent Running SOD from OPS with Open Checks: Select this option so that Start of Day (SOD) cannot run when open checks exist.

4. If enabled, click **Save**.
5. Select the property, click **Setup**, and then click **Property Parameters**.
6. Click the **Calendar** tab.
7. Set the time you want the SOD to automatically begin for each day of the week.

> **Note:**
>
> If you want to automatically begin the SOD after 12:00 noon, but before 12:00 (00:00) midnight, enable the **Set Business Date equal to Calendar Date if Start of Day configured between 12:00 PM and Midnight** checkbox.

Figure 37-1 EMC Property Parameters Module - Calendar Tab



The application checks to see whether the SOD occurred within a 24-hour period for the selected property. This time is based on the time zone of the property.

8. Click **Save**.
9. If you are running the Simphony Standard Cloud Service, it is not necessary to select any autosequences within the **PC Autosequence** fields for any day of the week. The automatic SOD configuration is now complete.

   If you are running the Simphony Premium Cloud Service, perform the following steps:

1. Select the Enterprise level, click **Configuration**, and then click **PC Autosequences**.
2. Insert a PC Autosequence record and name it **Increment Business Day**.
3. Open the record, and then select the **Allowed Properties** to view the autosequence.
4. (Optional) Add **Parameters** as appropriate. For example, you can enter a property number and exclude a revenue center number.
5. On the **Steps** tab, add a step, and then from the **Step Type** drop-down list, select **3 - Increment Business Date**.
6. Click **Save**.
7. Click **Property Parameters**, and then select the **Calendar** tab. Adjacent to each day of the week, click the **Select** link and assign the **Increment Business Day** autosequence, and then click **Save**.

Configuring an Automatic SOD for a Revenue Center

Configuring an automatic SOD for a revenue center is similar to configuring it for a property.

1. From the EMC, select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Calendar** tab.
3. Set the time you want the SOD to automatically begin for each day of the week (in 24 hour format).
4. If you want to automatically begin the SOD after 12:00 noon, but before 12:00 (00:00) midnight, enable the **Set Business Date equal to Calendar Date if Start of Day configured between 12:00 PM and Midnight** checkbox.
5. Click **Save**.

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Updating POS Client Configuration

You can establish the frequency with which database synchronization jobs run on the workstations. By default, the workstations and Kitchen Display System (KDS) Controllers wait 30 minutes to retrieve the latest updates from the database.

The Database Update Frequency setting exists in three EMC modules:

- Property Parameters
- Workstations
- KDS Controller

The Workstations module setting or KDS Controller module setting takes precedence over the Property Parameters setting. If the workstation's Database Update Frequency setting is greater than the Property Parameters setting, the highest configured value within the entire Workstations module for the property is used for the purge jobs event scheduling calculation.

Setting the Database Update Frequency

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Workstations** tab.
3. In the **Database Update Frequency** field, enter the number of seconds that workstations and KDS Controllers wait to retrieve the latest updates from the database.
4. Click **Save**.
5. To override this setting for the workstation, select the property, click **Setup**, and then click **Workstations**.
6. Double-click the workstation.
7. On the **General** tab, set the **Database Update Frequency** timeout value.
8. Click **Save**.
9. To override this setting for the KDS, select the property, click **Setup**, and then click **KDS Controllers**.
10. Double-click the KDS record.
11. On the **General** tab, set the **Database Update Frequency** timeout value.
12. Click **Save**.

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Clearing Totals

If you have the appropriate privileges, you can purge unwanted transaction totals accumulated during testing and training periods prior to going live. Clearing totals immediately purges the totals for all of the designated property's revenue centers from the Enterprise. You cannot clear totals for individual revenue centers.

The Clear Totals operation performs the following tasks:

- Immediately purges the property's transaction totals and check related data on and prior to the selected business date from the Enterprise
- Initiates a request to run a purge job for the reporting database (Oracle Hospitality Reporting and Analytics Advanced) totals
- Purges the MRequest Queues data
- Purges the Journal log file data
- (Optional) Purges Cash Management data

After the Clear Totals operation begins, two data purging events are scheduled to run for the following purge jobs:

- Check and Posting Service (CAPS) Database: This event runs first based on the Database Update Frequency setting, plus an additional 30 minutes. When the scheduled time is reached, the application purges the designated property's CAPS database.
- Workstation DataStore Data: This event runs second based on the Database Update Frequency setting, plus an additional 45 minutes. When the scheduled time is reached, the application purges the DataStore data from the designated property's workstations.

Running the Clear Totals Operation

Before clearing totals, you must batch and settle all credit card transactions dated prior to the specified business date. You cannot clear totals when unbatched credit cards exist. Oracle recommends that you generate and save all credit card related reports from either the EMC or Oracle Hospitality Reporting and Analytics for historical reference.

Time Zone synchronization between the Simphony application server and workstations is important for the Clear Totals operation to work correctly. The CAL keeps the time settings on Simphony clients in synchrony with the Simphony application server. Some devices do not use CAL for configuration, and these devices can become asynchronous with the Simphony application server. Therefore, before running the Clear Totals operation, ensure that the time settings on non-CAL devices are set to match the Simphony application server's time settings as closely as possible.

1. Select the property, click **Tasks**, and then click **Clear Totals**.
2. Select the **Business Date** from the drop-down list.
3. Click **Clear Totals**. The Result window shows the status of each purged job.
4. Select the property, click **Setup**, and then click **Workstations**.
5. Look at the column named **Totals Cleared Through**, and verify that the date and time appear in the column for each workstation at the property.

6. Double-click the Check and Posting Service (CAPS) workstation, and then click the **Service Host** tab.
7. Verify that the date and time appear in the **Totals Cleared Through** column for the CAPS workstation.

EGateway log files show the date and time a Clear Totals operation was performed.

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Check and Posting Service (CAPS)

The Check and Posting Service (CAPS) is a required service that runs on-premises at the property. CAPS acts as the bridge between the Enterprise and the property, providing resiliency and increasing system performance. As workstation operators perform transactions and other operations on POS clients, CAPS stores the information and then posts in real-time to the Enterprise. Each property must have CAPS configured because without it, information occurring on the POS clients does not post to the Enterprise.

In the event of a WAN outage, POS clients are largely unaffected as they continue to post transactions to the on-premises CAPS. During a WAN outage, the Enterprise is inaccessible to the property; changes made in EMC are not reflected on POS clients, and Reporting and Analytics reports do not include the live transactions. Other systems and functions that rely on Enterprise connectivity are similarly impacted. When the WAN connection is restored, CAPS posts the information to the Enterprise.

CAPS also serves as the arbitrator of check sharing by maintaining a record of check ownership. This minimizes the likelihood of multiple POS clients having conflicting versions of a check.

Some properties perform a large volume of transactions that overwhelm the POS client workload. For these environments, it may be necessary to run CAPS on a PC with significantly more computing resources and disk space. The information in this chapter explains the variety of configuration methods for CAPS.

The *Oracle Food and Beverage Compatibility Matrix* contains a list of software and hardware supported with CAPS.

CAPS Configuration Methods

Beginning with Simphony version 2.9, you can run the CAPS web application on Microsoft Internet Information Services (IIS) and also have the CAPS database reside on an Oracle database.

Running CAPS as a web service is an alternative method to running CAPS as a Windows service and a workstation-based service. In Simphony versions earlier than 2.9, CAPS runs only on a Microsoft SQL Server database and the embedded Simphony Service Host Webkit web server.

CAPS needs to be on-property regardless of which configuration fits the business architecture. CAPS holds state information of checks and hence, the CAPS service must be on sticky sessions. The CAPS service cannot reside behind a load balancer.

You can run CAPS using one of the following types of configuration methods:

- CAPS Running on a POS Client Workstation (along with the POS client)
- CAPS Running on a POS Client Workstation (without the POS client)
- CAPS Running as a Windows Service with Oracle database
- CAPS Running as a Windows Service with Microsoft SQL Server database
- CAPS Running as a Web Service on Microsoft Internet Information Services (IIS) with Oracle database

- CAPS Running as a Web Service on Microsoft IIS with Microsoft SQL Server database

Table 40-1 CAPS Configuration Methods

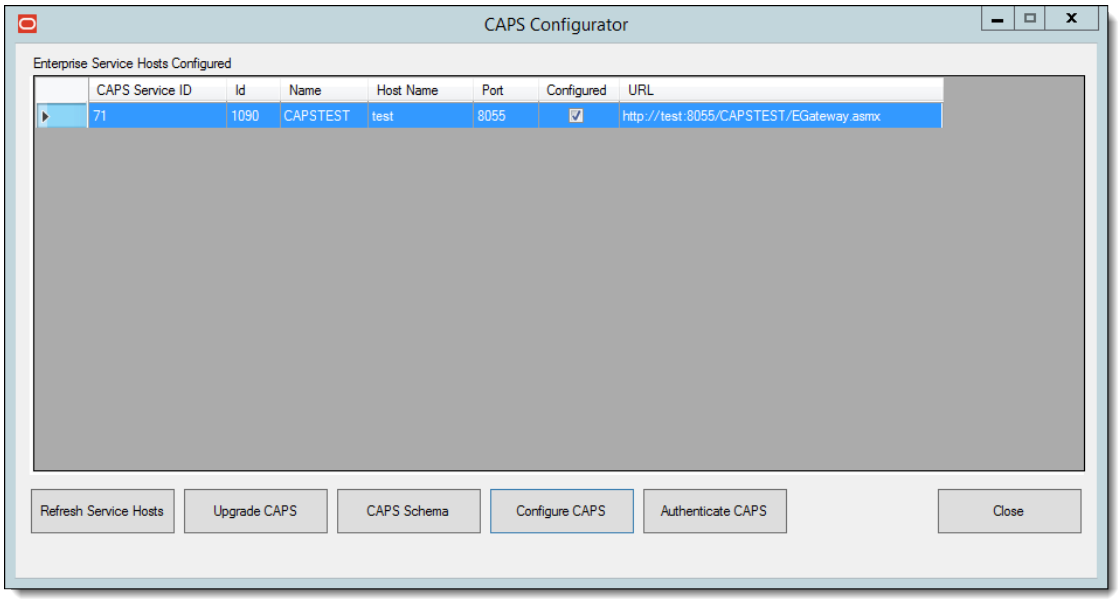
CAPS Configuration Details	CAPS on a POS Client Workstation	CAPS as a Windows Service	CAPS as a Web Service on Microsoft IIS
CAPS Database	Microsoft SQL Express	Oracle Database Microsoft SQL Server	Oracle Database Microsoft SQL Server
CAPS Service Host	POS client	CAPS Only	CAPS Only
Hardware	All supported Oracle MICROS workstations	All supported Microsoft Windows Servers	All supported Microsoft Windows Servers

CAPS Configuration Tool

To facilitate CAPS configuration, you can use the CAPS Configuration Tool. The CAPS Configuration Tool is packaged with the Simphony 18.1 release during an installation or upgrade, deploys on the Simphony server to the `[Drive letter]:\MICROS\Simphony2\Tools` folder, and is named CAPSConfigurator.

If privileged to do so, when you click **CAPSConfigurator**, use your EMC logon credentials to sign on to the tool. The tool provides an option to upgrade CAPS to future versions of Simphony, create the CAPS database schema on either an Oracle or Microsoft SQL Server database. The tool can also assist you in configuring the service on IIS, and finally, it can authenticate CAPS on existing Services Hosts running instances of CAPS on IIS.

Figure 40-1 CAPS Configurator Tool



Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Prerequisite Products for CAPS

The following prerequisite products are required when using CAPS as a web service on Microsoft Internet Information Services (IIS), unless otherwise noted.

- Simphony Release 2.9 or Later
- Database Platform (one of the following):
  - Oracle Database 12c Server
  - Oracle Database 12c Standard Edition
- Operating System Components:
  - Microsoft IIS
  - Microsoft .NET Framework 4.6.1

Tasks to Set Up CAPS as a Web Service on Microsoft Internet Information Services (IIS)

Setting up CAPS as a web service consists of completing the following tasks:

- Allowing access to the CAPS Configuration Tool
- Enabling users to install and authenticate workstations
- Configuring the Service Host for CAPS in the EMC
- Installing CAPS database software
- Configuring the CAPS database
- Configuring the Service on Microsoft IIS

Configuring CAPS on Microsoft IIS with Oracle Database on Enterprise Server

The option to run CAPS on an Enterprise server is only available for licensed Simphony customers. The Simphony cloud services do not support this feature.

Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Configuring CAPS Access

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Miscellaneous** subtab.
3. Select the following Miscellaneous options:
   - **10061 - Allow Access to the IIS CAPS Configurator Tool**
   - **10065 - Download Software, Install and Authenticate Clients and Service Hosts Using CAL**
4. Click **Save**.

> **Note:**
>
> Before you perform an upgrade to Simphony 18.1 from Simphony versions 2.9.x or 2.10, you need to ensure that the options described above are enabled before running the post-upgrade CAPS Configuration Tool. Specifically, if option 10065 is disabled prior to the upgrade, after the upgrade, an error message appears during your login to the CAPS Configuration Tool . If you click **OK** on the error message window, you can log onto the CAPS Configuration Tool, but you cannot utilize the **Authenticate CAPS** button (added to the CAPS Configuration Tool for the Simphony 18.1 release).

Configuring the Service Host for CAPS in EMC

Follow these steps to configure the Service Host for a hosted Enterprise with Simphony Premium Cloud Service users:

1. Select the Enterprise level, click **Setup**, and then click **Service Hosts**.
2. Insert a new Service Host record, and then double-click it to open in form view.
3. In the **Host Name** field, enter the host name of the Simphony application server where Microsoft IIS is running.
4. Enter the **Subnet Mask** and the **Default Gateway** of the Enterprise server.
5. Click **Save**.
6. Select the property, click **Setup**, and then click **Property Parameters**.
7. Click the **Workstations** tab.
8. From the Service Hosts section, select the CAPS Service Host created in Step 1, and then enter the **Port** number for CAPS configuration. For example, port number 8050.

   This port is the unused port number and is different from the EGateway service port.
9. Click **Save**.

Configuring CAPS with an Oracle Database

1. Run the ODP.NET_12CR2.bat under the current directory with administrator privileges from a command prompt.
2. Navigate to the directory containing the CAPSConfigurator folder.

   Depending on your configuration method, the path is one of the following:

   - `[Drive Letter]:\MICROS\Simphony2\Tools\CAPSConfigurator`
   - `[Drive Letter]:\MICROS\Simphony\CAPSonIIS\Tools\CAPSConfigurator`
3. Double-click **CAPSConfigurator**, enter the server and port number of the EGateway, and sign in using your EMC credentials. A list of Service Hosts appears.
4. Click the Service Host to configure.
5. Click **CAPS Schema**.
6. Enter the appropriate information in the CAPS Schema dialog, and then click **Next**.
   - **Database**: Select the Oracle database type.
   - **Server**: Enter the server name.

- **Port**: Enter the port number.
- **Service name**: Enter the service name.
- **Admin User**: Enter the administrative user name used to sign onto the Oracle database server, for example, the system user name. This user name cannot be a DBA user.
- **Password**: Enter the current user's password to sign onto the Oracle database server.

7. In the next CAPS Schema dialog, enter the **User Name**, **Password**, and **Confirm Password** to create a new database user for the CAPS database, and then click **Next**.
8. Click **OK** to confirm. A message indicates success.

   The CAPS Schema dbsettings.xml is configured at one of the following directories (depending on your configuration):

   - `[Drive Letter]:\MICROS\Simphony2\IISCAPSServiceHost`
   - `[Drive Letter]:\MICROS\Simphony\IISCAPSServiceHost`

   Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Configuring CAPS on Microsoft IIS

In the CAPS Configurator Tool, click **Configure CAPS**.

The CAPS Configurator Tool detects and configures the new Service Host. Upon successful configuration, the configured check box in the UI is automatically selected for the configured Service Host. A browser opens with the configured CAPS URL.

CAPS is configured at `[Drive Letter]:\MICROS\Simphony2\EgatewayService\IISCAPSServiceHost`.

Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

> **NOT_SUPPORTED:**
>
> CAPS on IIS updates KDS devices and workstation databases based on the **Database Update Frequency** setting (in seconds). For example, an entry of 1800 = 30 minutes. To access this setting, open the EMC. Click the **Property**, **Setup**, **Property Parameters**, **Workstation** tab.

Configuring CAPS on Microsoft IIS with Oracle Database on Remote Service Host

The CAPS service must run on the same server where the Oracle database is installed.

Configuring CAPS Access

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Miscellaneous** subtab.
3. Select the following Miscellaneous options:

- **10061 - Allow Access to the IIS CAPS Configurator Tool**
- **10065 - Download Software, Install and Authenticate Clients and Service Hosts Using CAL**

4. Click **Save**.

> **Note:**
>
> Before you perform an upgrade to Simphony 18.1 from Simphony versions 2.9.x or 2.10, you need to ensure that the options described above are enabled before running the post-upgrade CAPS Configuration Tool. Specifically, if option 10065 is disabled prior to the upgrade, after the upgrade, an error message appears during your login to the CAPS Configuration Tool . If you click **OK** on the error message window, you can log onto the CAPS Configuration Tool, but you cannot utilize the **Authenticate CAPS** button (added to the CAPS Configuration Tool for the Simphony 18.1 release).

Configuring the Service Host for CAPS in EMC

1. To configure the Service Host for a hosted Enterprise with Simphony Standard Cloud Service users:
   a. Select the property level, click **Setup**, and then click **Workstations**.
   b. Insert a new workstation record, and then double-click it to open in form view.
   c. On the **General** tab, enter the host name of the remote server where CAPS will be configured in the **Address/Host Name** field.
   d. Enter the **Subnet Mask** and the **Default Gateway** of the remote server where CAPS will be configured.
   e. If you are configuring CAPS as a Windows Service, select **Is Windows Service**. Otherwise, skip this step.
   f. Click **Save**.
   g. Click the **Remove OPS From Service Host** link, and then click **Yes** to confirm.
2. To configure the Service Host for a hosted Enterprise with Simphony Premium Cloud Service users:
   a. Select the Enterprise level, click **Setup**, and then click **Service Hosts**.
   b. Insert a new Service Host record, and then double-click it to open in form view.
   c. In the **Host Name** field, enter the host name of the remote server where CAPS will be configured.
   d. Enter the **Subnet Mask** and the **Default Gateway** of the remote server.
   e. If you are configuring CAPS as a Windows Service, select **Is Windows Service**. Otherwise, skip this step.
   f. Click **Save**.
3. Select the property, click **Setup**, and then click **Property Parameters**.
4. Click the **Workstations** tab.
5. From the Service Hosts section, select the CAPS Service Host created in Step 1 or 2, and then enter the **Port** number for CAPS configuration.

This Port is the unused port number and is different from the Egateway service port.

6. Click **Save**.

Preparing the Server to Configure CAPS

1. Ensure that the Server has the latest Microsoft Windows patches.
2. Turn on the Microsoft Windows features:
   - Microsoft .NET Framework 3.5
   - Microsoft IIS
3. Install Microsoft .NET Framework 4.6.1.
4. Install the Oracle Database 12c Server database.
   a. Deselect the pluggable database option.
   b. Select the database admin user system account or equivalent.
5. In the EMC, configure the CAPSOnIIS CAL package for deployment to the Remote Service Host.
6. Install the CAL client on the Remote Service Host.
7. In the EMC, deploy the CAPSOnIIS CAL Package to the configured Service Host.

   After completion, this package is available in the `[Drive Letter]:\Micros\Simphony\CAPSonIIS` folder.
8. If you are using Oracle Database 12c Release 2 for the CAPS database, complete the following steps:
   a. Navigate to `[Drive Letter]:\Micros\Simphony\CAPSOnIIS\Tools\ODP.NET_12CR2`, and then follow the instructions in the Readme.
   b. Run the ODP.NET_12CR2.bat under the current directory with administrator privileges from a command prompt.

      During batch file execution, the status appears in the Command Prompt window.
   c. After successful execution of the batch file, close the Command Prompt window.

Scheduling and Viewing Device Information

To communicate workstation information, a core CAL package called Device Information runs at each workstation and on CAPS running on a POS client workstation without the POS client. The Device Information CAL package is not needed for Simphony release 19.1.2 as it is deployed automatically with the Service Host. However, the Device Information CAL package must be deployed for clients that still run on an earlier Simphony release (prior to 19.1.2), so the device information and metrics can be sent to the enterprise for the older clients. The resulting device information status is propagated to the Service Host and to the property.

The Device Information module lets you schedule and view workstation metrics in the EMC at the Enterprise level. The device information allows administrators to detect possible issues that could prevent a client from upgrading successfully. Device Information Needs Attention State contains a list and description of the needs attention workstation state.

The detailed status of workstations and other CAL-enabled devices appears in the Device Information module. After the CAL client is installed, the Device Information module shows data if the following conditions are met:

- The CAL client is updated to Simphony release 19.1.2.
- The Device Information CAL package is deployed to the workstation, which shows the status upon deployment.

1. To schedule the device information task:
   a. Select the Enterprise level, click **Configuration**, and then click **Task Schedules**.
   b. Double-click the task schedule to open it in table view.
   c. Select **8 - Device Information** from the **Task Type** drop-down list.

      By default, the Device Information task is scheduled to run daily at 5:00 a.m. local time. You can change this by clicking the **Recurrence** tab and changing the **Daily Frequency** occurrence options.
   d. Ensure that the **Task Data** field shows `DEVICE_INFORMATION_STATUS`.
   e. Click **Save**.
2. To view the workstation information after the device information task runs:
   a. Select the Enterprise level, click **Tasks**, and then click **Device Information**.

      The left pane shows a list of properties under Locations. If a property does not have the Service Host, the middle and right panes are blank.

      The middle pane shows a list of Service Hosts.

      The right pane shows all device information, including CAL, Workstation Hardware, Security, and Simphony Software Information.

      There are two statuses icons to indicate the device information status:

      Table 40-2 Device Information Status Icons

Icon	Icon Name	Icon Status Description
	No Issues	The device information meets the requirements and there are no issues detected.
	Needs Attention	The device information does not meet the requirements. For example, the workstation device might need to be restarted for operating system updates.

   b. To limit the Service Hosts shown in the middle pane, select the filters for **Status** (All, No Issues, Need Attention), **Name**, **Software Version**, and **CAL Version**.
   c. Click a Service Host to change the view in the right pane.
   d. To expand and collapse the views in the right pane, click the individual green triangle icons, or click the **Expand/Collapse All** link in the upper right corner.

Device Information Needs Attention State

The Device Information module checks the following settings for each workstation. The status is available at the Enterprise level, and listed by property. The following table describes what causes the Needs Attention state.

Table 40-3 Device Information Workstations That Need Attention

Device Information	Values	Needs Attention State	Description
CAL Enabled?	Yes/No	No	If CAL is not enabled, the workstation does not query the Simphony enterprise and does not receive scheduled CAL packages.
TLS Connection OK?	Yes	No	Verifies whether the connection string to the enterprise uses https.
Auth Key Present/ Connect?	Yes/No	No	Verifies whether the authentication key is present and can connect through TLS to the Simphony enterprise.
Password Policy Ok?	Yes/No	No	Verifies that the password policy does not prevent successful updating of the database password.
DBA Login Ok?	Yes/No	No	Verifies that the database administrator can log in to the local client database.
Database Max. Login Ok?	Yes/No	No	Verifies whether the maximum log in failure meets the requirements, which is minimum 8 for normal clients. If Database Max. Login Ok? needs attention, check the security account lockout threshold policy through the Local Security Policy in Windows. Security Considerations in the *Oracle MICROS Simphony Client Deployment Guide* contains more information.
DB Pending credentials changes	Yes/No	Yes	Verifies whether database credential changes are pending, which require a restart.

Table 40-3 (Cont.) Device Information Workstations That Need Attention

Device Information	Values	Needs Attention State	Description
Sufficient Disk Space?	Yes/No	No	Verifies whether the disk space falls below the minimum of 1.5 GB free space.
OS pending reboot	Yes/No	Yes	Test whether a restart is pending because of a Windows update (Win32 devices only).
Directory Security	Ok/No/NA	No	Test whether one of the following directories are not accessible: • %AppRoot%: Ok • %ALLUSERSPROFILE%: Ok Security Considerations in the *Oracle MICROS Simphony Client Deployment Guide* contains more information.

Configuring CAPS with an Oracle Database

1. Run the ODP.NET_12CR2.bat under the current directory with administrator privileges from a command prompt.
2. Navigate to the directory containing the CAPSConfigurator folder.

   Depending on your configuration method, the path is one of the following:

   - `[Drive Letter]:\MICROS\Simphony2\Tools\CAPSConfigurator`
   - `[Drive Letter]:\MICROS\Simphony\CAPSonIIS\Tools\CAPSConfigurator`
3. Double-click **CAPSConfigurator**, enter the server and port number of the EGateway, and sign in using your EMC credentials. A list of Service Hosts appears.
4. Click the Service Host to configure.
5. Click **CAPS Schema**.
6. Enter the appropriate information in the CAPS Schema dialog, and then click **Next**.
   - **Database**: Select the Oracle database type.
   - **Server**: Enter the server name.
   - **Port**: Enter the port number.
   - **Service name**: Enter the service name.
   - **Admin User**: Enter the administrative user name used to sign onto the Oracle database server, for example, the system user name. This user name cannot be a DBA user.
   - **Password**: Enter the current user's password to sign onto the Oracle database server.

7. In the next CAPS Schema dialog, enter the **User Name**, **Password**, and **Confirm Password** to create a new database user for the CAPS database, and then click **Next**.
8. Click **OK** to confirm. A message indicates success.

   The CAPS Schema dbsettings.xml is configured at one of the following directories (depending on your configuration):

   - `[Drive Letter]:\MICROS\Simphony2\IISCAPSServiceHost`
   - `[Drive Letter]:\MICROS\Simphony\IISCAPSServiceHost`

   Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Configuring CAPS on Microsoft IIS

In the CAPS Configurator Tool, click **Configure CAPS**.

The CAPS Configurator Tool detects and configures the new Service Host. Upon successful configuration, the configured check box in the UI is automatically selected for the configured Service Host. A browser opens with the configured CAPS URL.

CAPS is configured at `[Drive Letter]:\MICROS\Simphony2\EgatewayService\IISCAPSServiceHost`.

Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

> **NOT_SUPPORTED:**
>
> CAPS on IIS updates KDS devices and workstation databases based on the **Database Update Frequency** setting (in seconds). For example, an entry of 1800 = 30 minutes. To access this setting, open the EMC. Click the **Property**, **Setup**, **Property Parameters**, **Workstation** tab.

Upgrading Microsoft IIS CAPS

Upgrading Microsoft IIS CAPS on Enterprise Server

1. Upgrade Simphony on the Enterprise server.
2. Browse to `[Drive Letter]:\Micros\Simphony\Tools\CAPSConfigurator`.
3. Double-click **CAPSConfigurator**, enter the server and port number of the EGateway, and sign in using your EMC credentials. A list of Service Hosts appears.
4. Select the Service Host configured on this server that needs to be upgraded.
5. Click **Upgrade CAPS**.

   The CAPS Configurator Tool detects and configures the Service Host. Upon successful configuration, the configured check box in the UI is automatically selected for the configured Service Host. A browser opens with the configured CAPS URL.

   Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Upgrading Microsoft IIS CAPS on Remote Service Host

1. Upgrade Simphony on the Enterprise server.
2. In the EMC, deploy the CAPSOnIIS CAL package to the configured Service Host.
3. Browse to `[Drive letter]:\Micros\Simphony2\CAPSOnIIS\Tools\CAPSConfigurator` on the remote server.
4. Double-click **CAPSConfigurator**, enter the server and port number of the EGateway, and sign in using your EMC credentials. A list of Service Hosts appears.
5. Select the Service Host configured on this server that needs to be upgraded.
6. Click **Upgrade CAPS**.

   The CAPS Configurator Tool detects and configures the Service Host. Upon successful configuration, the configured check box in the UI is automatically selected for the configured Service Host. A browser opens with the configured CAPS URL.

   Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Configuring CAPS as a Windows Service with an Oracle Database

CAPS must run on the same server where the Oracle database is installed. You can set up CAPS as a Windows service only on remote servers—not on the Enterprise server—for both Simphony Premium Cloud Service and Simphony Standard Cloud Service users.

Configuring CAPS Access

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Miscellaneous** subtab.
3. Select the following Miscellaneous options:
   - **10061 - Allow Access to the IIS CAPS Configurator Tool**
   - **10065 - Download Software, Install and Authenticate Clients and Service Hosts Using CAL**
4. Click **Save**.

> **Note:**
>
> Before you perform an upgrade to Simphony 18.1 from Simphony versions 2.9.x or 2.10, you need to ensure that the options described above are enabled before running the post-upgrade CAPS Configuration Tool. Specifically, if option 10065 is disabled prior to the upgrade, after the upgrade, an error message appears during your login to the CAPS Configuration Tool . If you click **OK** on the error message window, you can log onto the CAPS Configuration Tool, but you cannot utilize the **Authenticate CAPS** button (added to the CAPS Configuration Tool for the Simphony 18.1 release).

Configuring the Service Host for CAPS in EMC

1. To configure the Service Host for a hosted Enterprise with Simphony Standard Cloud Service users:
    a. Select the property level, click **Setup**, and then click **Workstations**.
    b. Insert a new workstation record, and then double-click it to open in form view.
    c. On the **General** tab, enter the host name of the remote server where CAPS will be configured in the **Address/Host Name** field.
    d. Enter the **Subnet Mask** and the **Default Gateway** of the remote server where CAPS will be configured.
    e. If you are configuring CAPS as a Windows Service, select **Is Windows Service**. Otherwise, skip this step.
    f. Click **Save**.
    g. Click the **Remove OPS From Service Host** link, and then click **Yes** to confirm.
2. To configure the Service Host for a hosted Enterprise with Simphony Premium Cloud Service users:
    a. Select the Enterprise level, click **Setup**, and then click **Service Hosts**.
    b. Insert a new Service Host record, and then double-click it to open in form view.
    c. In the **Host Name** field, enter the host name of the remote server where CAPS will be configured.
    d. Enter the **Subnet Mask** and the **Default Gateway** of the remote server.
    e. If you are configuring CAPS as a Windows Service, select **Is Windows Service**. Otherwise, skip this step.
    f. Click **Save**.
3. Select the property, click **Setup**, and then click **Property Parameters**.
4. Click the **Workstations** tab.
5. From the Service Hosts section, select the CAPS Service Host created in Step 1 or 2, and then enter the **Port** number for CAPS configuration.

    This Port is the unused port number and is different from the Egateway service port.
6. Click **Save**.

Preparing the Server to Configure CAPS

1. Ensure that the Server has the latest Microsoft Windows updates.
2. Turn on the Microsoft Windows features:
    - Microsoft .NET Framework 3.5
    - Microsoft IIS
3. Install Microsoft .NET Framework 4.6.1.
4. Install the Oracle 12c 32-bit client.
5. Install the Oracle Database 12c Server.
    a. Deselect the pluggable database option.

b. Select the database admin user system account or equivalent.

6. From the EMC, configure the CAPSOnIIS CAL package for deployment to the Remote Service Host.
7. Set up the Service Host prerequisites for deployment to the Remote Service Host.
8. Set up the Service Host for deployment to the Remote Service Host.
9. Install the CAL client on the Remote Service Host.
10. From the EMC, deploy the CAPSOnIIS CAL Package to the configured Service Host.
11. If you are using Oracle Database 12c Release 2 for the CAPS database, complete the following steps:
    a. Navigate to [Drive Letter]:\Micros\Simphony\CAPSOnIIS\Tools\ODP.NET_12CR2, and then follow the instructions in the Readme.
    b. Run the ODP.NET_12CR2.bat under the current directory with administrator privileges from a command prompt.

       During batch file execution, the status appears in the Command Prompt window.
    c. After successful execution of the batch file, close the Command Prompt window.
12. Deploy the Service Host prerequisites CAL Package.
13. Deploy the Service Host CAL Package.
14. Stop the CAPS Service.

Scheduling and Viewing Device Information

To communicate workstation information, a core CAL package called Device Information runs at each workstation and on CAPS running on a POS client workstation without the POS client. The Device Information CAL package is not needed for Simphony release 19.1.2 as it is deployed automatically with the Service Host. However, the Device Information CAL package must be deployed for clients that still run on an earlier Simphony release (prior to 19.1.2), so the device information and metrics can be sent to the enterprise for the older clients. The resulting device information status is propagated to the Service Host and to the property.

The Device Information module lets you schedule and view workstation metrics in the EMC at the Enterprise level. The device information allows administrators to detect possible issues that could prevent a client from upgrading successfully. Device Information Needs Attention State contains a list and description of the needs attention workstation state.

The detailed status of workstations and other CAL-enabled devices appears in the Device Information module. After the CAL client is installed, the Device Information module shows data if the following conditions are met:

- The CAL client is updated to Simphony release 19.1.2.
- The Device Information CAL package is deployed to the workstation, which shows the status upon deployment.

1. To schedule the device information task:
    a. Select the Enterprise level, click **Configuration**, and then click **Task Schedules**.
    b. Double-click the task schedule to open it in table view.
    c. Select **8 - Device Information** from the **Task Type** drop-down list.

       By default, the Device Information task is scheduled to run daily at 5:00 a.m. local time. You can change this by clicking the **Recurrence** tab and changing the **Daily Frequency** occurrence options.

d. Ensure that the **Task Data** field shows `DEVICE_INFORMATION_STATUS`.

e. Click **Save**.

2. To view the workstation information after the device information task runs:

a. Select the Enterprise level, click **Tasks**, and then click **Device Information**.

The left pane shows a list of properties under Locations. If a property does not have the Service Host, the middle and right panes are blank.

The middle pane shows a list of Service Hosts.

The right pane shows all device information, including CAL, Workstation Hardware, Security, and Simphony Software Information.

There are two statuses icons to indicate the device information status:

Table 40-4 Device Information Status Icons

Icon	Icon Name	Icon Status Description
	No Issues	The device information meets the requirements and there are no issues detected.
	Needs Attention	The device information does not meet the requirements. For example, the workstation device might need to be restarted for operating system updates.

b. To limit the Service Hosts shown in the middle pane, select the filters for **Status** (All, No Issues, Need Attention), **Name**, **Software Version**, and **CAL Version**.

c. Click a Service Host to change the view in the right pane.

d. To expand and collapse the views in the right pane, click the individual green triangle icons, or click the **Expand/Collapse All** link in the upper right corner.

Device Information Needs Attention State

The Device Information module checks the following settings for each workstation. The status is available at the Enterprise level, and listed by property. The following table describes what causes the Needs Attention state.

Table 40-5 Device Information Workstations That Need Attention

Device Information	Values	Needs Attention State	Description
CAL Enabled?	Yes/No	No	If CAL is not enabled, the workstation does not query the Simphony enterprise and does not receive scheduled CAL packages.

Table 40-5 (Cont.) Device Information Workstations That Need Attention

Device Information	Values	Needs Attention State	Description
TLS Connection OK?	Yes	No	Verifies whether the connection string to the enterprise uses https.
Auth Key Present/ Connect?	Yes/No	No	Verifies whether the authentication key is present and can connect through TLS to the Simphony enterprise.
Password Policy Ok?	Yes/No	No	Verifies that the password policy does not prevent successful updating of the database password.
DBA Login Ok?	Yes/No	No	Verifies that the database administrator can log in to the local client database.
Database Max. Login Ok?	Yes/No	No	Verifies whether the maximum log in failure meets the requirements, which is minimum 8 for normal clients. If Database Max. Login Ok? needs attention, check the security account lockout threshold policy through the Local Security Policy in Windows. Security Considerations in the *Oracle MICROS Simphony Client Deployment Guide* contains more information.
DB Pending credentials changes	Yes/No	Yes	Verifies whether database credential changes are pending, which require a restart.
Sufficient Disk Space?	Yes/No	No	Verifies whether the disk space falls below the minimum of 1.5 GB free space.

Table 40-5 (Cont.) Device Information Workstations That Need Attention

Device Information	Values	Needs Attention State	Description
OS pending reboot	Yes/No	Yes	Test whether a restart is pending because of a Windows update (Win32 devices only).
Directory Security	Ok/No/NA	No	Test whether one of the following directories are not accessible: • %AppRoot%: Ok • %ALLUSERSPROFILE%: Ok Security Considerations in the *Oracle MICROS Simphony Client Deployment Guide* contains more information.

Configuring CAPS with an Oracle Database

1. Run the ODP.NET_12CR2.bat under the current directory with administrator privileges from a command prompt.
2. Navigate to the directory containing the CAPSConfigurator folder.

   Depending on your configuration method, the path is one of the following:

   - `[Drive Letter]:\MICROS\Simphony2\Tools\CAPSConfigurator`
   - `[Drive Letter]:\MICROS\Simphony\CAPSonIIS\Tools\CAPSConfigurator`
3. Double-click **CAPSConfigurator**, enter the server and port number of the EGateway, and sign in using your EMC credentials. A list of Service Hosts appears.
4. Click the Service Host to configure.
5. Click **CAPS Schema**.
6. Enter the appropriate information in the CAPS Schema dialog, and then click **Next**.
   - **Database**: Select the Oracle database type.
   - **Server**: Enter the server name.
   - **Port**: Enter the port number.
   - **Service name**: Enter the service name.
   - **Admin User**: Enter the administrative user name used to sign onto the Oracle database server, for example, the system user name. This user name cannot be a DBA user.
   - **Password**: Enter the current user's password to sign onto the Oracle database server.
7. In the next CAPS Schema dialog, enter the **User Name**, **Password**, and **Confirm Password** to create a new database user for the CAPS database, and then click **Next**.
8. Click **OK** to confirm. A message indicates success.

The CAPS Schema dbsettings.xml is configured at one of the following directories (depending on your configuration):

- `[Drive Letter]:\MICROS\Simphony2\IISCAPSServiceHost`
- `[Drive Letter]:\MICROS\Simphony\IISCAPSServiceHost`

Configuring CAPS Access contains important information about enabling the privileges to access the CAPS Configuration Tool.

Copying the Database Settings

Copy and replace the dbsettings.xml file from the CAPS_DIRECTORY_PATH (for example, copy from `[Drive Letter]:\MICROS\Simphony\IISCAPSServiceHost` to the `[Drive Letter]:\Micros\Simphony2\WebServer\wwwroot\EGateway` folder).

Starting the CAPS Service

After the CAL process is complete, CAPS starts automatically. It may take several seconds to create all tables and to synchronize data the first time.

Optional CAPS Configuration Tasks

CAPS Optimization for High Loads

To handle high transaction CAPS environments, system administrators can enable threaded posting.

- To enable threaded posting on CAPS running Simphony's native webserver in ServiceHost, modify the web.config.txt file located on the CAPS machine.
- To enable threaded posting on CAPSonIIS, modify the web.config file located on the CAPSonIIS machine. (Note that this is a different file than the one mentioned in the previous point.)

For Simphony 19.x users, the following key needs to be manually entered in the `appSettings` section:

```
<add key="MaxMrequestPlaybackThreads" value="x" />
```

In the syntax provided in the example above, **x** represents the number of threads.

The number of threads used depends on the volume of Mrequest messages. Also, the number of connections is derived from the number of threads. Under enough load, the value sets the upper limit of threads. There is a point when adding connections decreases performance. As such, if you have a posting backlog on CAPS, it is suggested to configure 1 thread for every 25 workstations as an initial value and adjust as needed based on the available CAPS hardware resources.

CAL Installation Prerequisites for a Workstation without the POS Interface (CAPS Only Workstation)

Before installing CAL on a CAPS-only workstation, perform the following functions:

- Configure a service host for CAPS. See Configuring the Service Host for CAPS in EMC for instructions.

- Assign the employee privilege to download software, install and authenticate clients and Service Hosts using CAL.

  Beginning with Simphony version 2.9.1 (which includes CAL version 139), users must have the employee privilege assigned to the appropriate role to successfully authenticate workstations, Android devices, and Kitchen Display Systems (KDS). After installing or upgrading to Simphony version 2.9.1 or later, you must assign the privilege to a user's role. When the Role option is set, employees can use their EMC logon credentials when CAL'ing devices. See Allowing Employees to Install and Authenticate POS Clients and Service Hosts for instructions to assign the privilege.
- Set the CAL deployment schedule. See Configuring the Deployment Schedule to Install CAL on a POS Client Workstation without Ops for instructions.

Configuring the Deployment Schedule to Install CAL on a Workstation without the POS Interface

1. Select the Enterprise, click **Setup**, and then click **CAL Packages**.
2. For Simphony version 2.9 and Simphony version 2.9.1:
   a. If the CAPS workstation is running Microsoft Windows Embedded POSReady 2009, select **Service Host Prereqs** from the left pane.
   b. If the CAPS workstation is running Microsoft Windows 7 or later, select **Service Host Prereqs (SQL 2012)** from the left pane.
3. For Simphony version 2.9.2, select **Service Host Prereqs** from the left pane for all POS clients.
4. Click the **Deployment Schedule** tab, and then click **Add Deployment**.
5. From the Deployment Type column, select **2 - Specific Service Host**.
6. In the Service Host column, click the ellipsis (...) point button, select the CAPS workstation, and then click **OK**.
7. In the Action To Take column, select **0 - Install**, and then click **Save**.
8. Select **Service Host** from the left pane, and then repeat Steps 4 through 7.

Installing CAL on a Workstation without the POS Interface

1. On the workstation, press **Start**, select **All Programs**, select **Micros Client Application Loader**, and then select **McrsCAL Config**.
2. Decipher and enter the correct access code, and then press the **Configure CAL** button.
3. Enter the correct code based on the six-digit number shown at the top, and then press **Next**.
4. In the Enter CAL Server dialog, select **MICROS Simphony** as the **POS Type**.

   MICROS Simphony is used for both Simphony Standard and Premium Cloud Service environments.
5. Set the following values, and then press **Next**:
   - **Server Name**: Leave this field blank.
   - **Server IP/URL**: Leave this field blank.
   - **CAL Enabled**: Select this option if it is not automatically set by default.

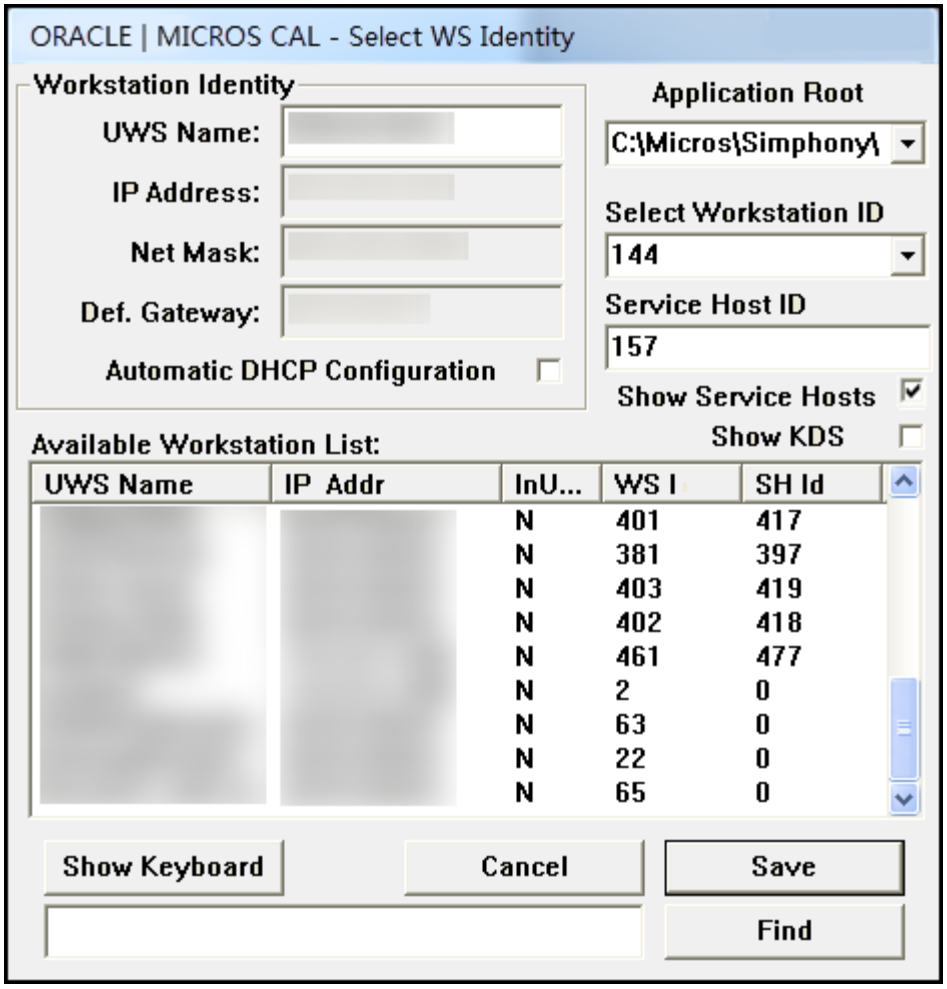
- **Secure Connection**: Select this option to use the Translation Layer Security (TLS) 1.2 Encryption protocol. (If you are installing CAL version 139 or later, this option is set by default.)
- **Server**: Enter the CAPS server name.
- **Port**: Enter `443`.
- **Update**: Click the **Update** button to automatically fill the **Server Name** and **Server IP/URL** fields after the application server name is resolved and recognized. You are now required to use an HTTPS secure connection in your Server URL.

6. If you are using Simphony version 2.9 (CAL version 138), skip to Step 8.
7. Beginning with Simphony version 2.9.1 and later, if you are installed on a Simphony Standard or Premium Cloud Service environment, CAL prompts you to enter your Simphony EMC logon credentials. Enter your **User** name and **Password** in the CAL Authentication dialog, and then press the **Login** button.
8. If the Enterprise has multiple properties, select the property from the Property Search and Select dialog, and then press **Next**.

   If the property does not appear in the list, enter the property name in the **Property Name** field, and then press **Search**.

   You do not see a property list if only one property is configured or if there are multiple properties, but only one property is using workstations.
9. In the Select WS Identity dialog, select the **Show Service Hosts** option, select the appropriate service host from the available workstation list, and then press **Save**. Make sure the Service Host ID and Workstation ID populate. The workstation automatically restarts several times when installing the CAL package.

Figure 40-2 Select Workstation Dialog



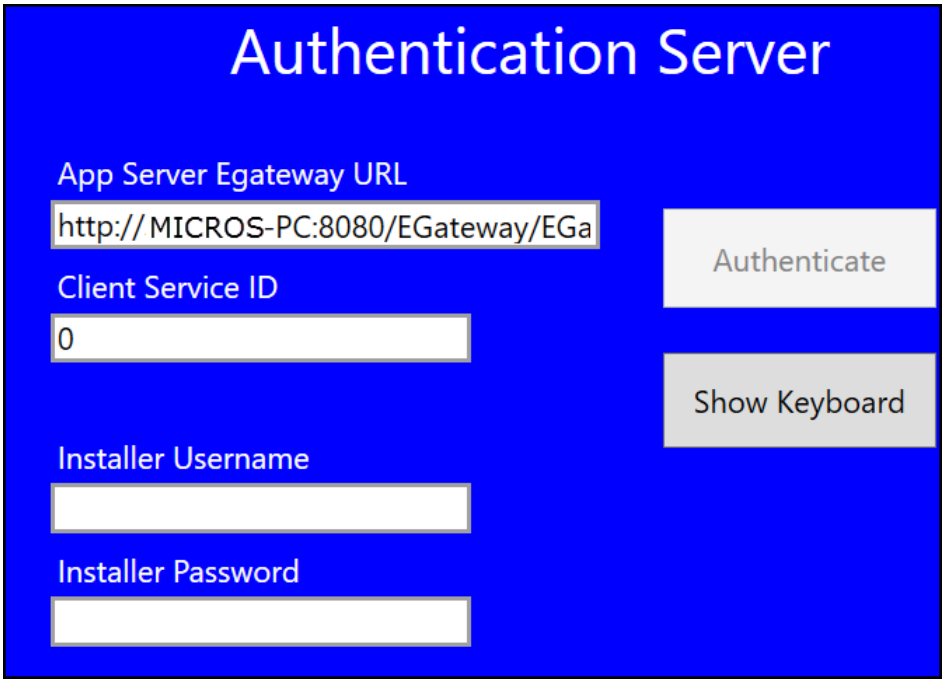
10. If you are using Simphony version 2.9 or Simphony version 2.9.2, after the CAL process completes:

    a. Browse to `[Drive letter]:\MICROS\Simphony\webserver`, and then click **AuthenticationServer**.

    b. For Simphony version 2.9, enter the following details in the Authentication Server application:

    - **Client Service ID**: Enter the Service ID for Check and Posting. You can find the Service ID in the Workstations tab of the Property Parameters module.
    - **Installer Username**: Enter the **Install User Security Username** configured in the Security tab of the Property Parameters module. Contact your system administrator for assistance.
    - **Installer Password**: Enter the **Install User Security Password** configured in the Security tab of the Property Parameters module. Contact your system administrator for assistance.

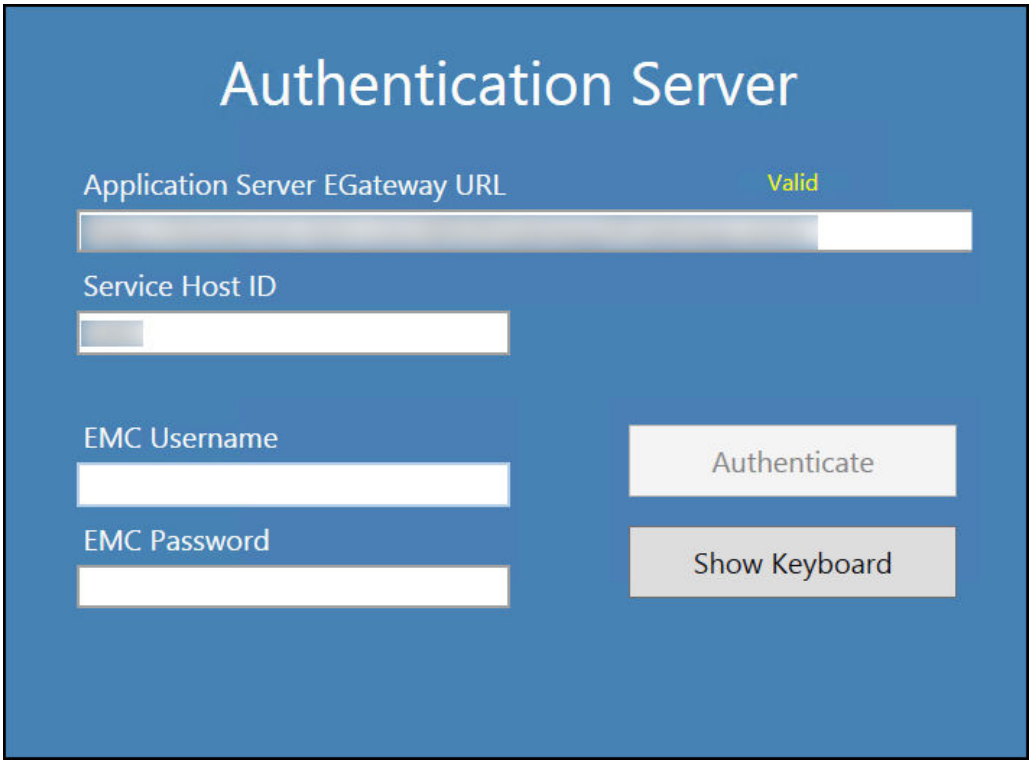
Figure 40-3 Authentication Server Application for Simphony 2.9



c. For Simphony version 2.9.2 and later, enter the following details in the Authentication Server application:

- **Service Host ID**: The service host ID. This value is automatically populated.
- **EMC Username**: Enter your EMC user name.
- **EMC Password**: Enter your EMC password.

Figure 40-4 Authentication Server Application for Simphony 2.9.2



d. Click **Authenticate**.

e. Restart the workstation.

Scheduling a Reload Check and Posting Database

You can schedule a full reload of the Check and Posting (CAPS) database for a property. Data in the CAPS workstation database will be deleted and replaced with new data when the reload is run, so access to the option needs to be restricted to support users only. (In the **Roles** module **Actions** tab, enable the **Tasks** action only for the support user role.)

The reload can be scheduled to run once during the next restart. This is a safe time to perform a restart without affecting POS operations when the database content is being removed and replaced. The new reload function is an emergency tool used to recover from data issues such as:

- CAPS being offline when database synchronization changes have been purged
- When a reload cannot be run from the front end (such as for CAPS running as a Service on a client)
- When the Enterprise Egateway and CAPS are not on the same LAN or VPN

The **Reload Check and Posting Database** function is performed once on the next restart of CAPS. This task is not repeated during each startup.

1. Select the property, click **Tasks**, and then click **Tasks**.
2. Click the **Reload Check and Posting Database** button, and then click **OK** to confirm. The Reload Database dialog shows the status as Pending or Idle, which indicates the status of the reload database task. The default value is Idle (not scheduled).
3. To cancel a pending operation, click the button again and confirm the cancellation.

Configuring the Show Database Provider Button

The following steps are optional:

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Double-click the page on which you want the Show Database Provider button to appear (typically the Sign In page).
3. Insert a new button.
4. On the **General** tab, select **Function** from the **Type** drop-down list, and then click the right arrow beneath the **Type** field.
5. On the left pane, in the **Name** field, enter `Show Database Provider`.
6. On the right pane, select **Show Database Provider** as the result, and then click **OK**.
7. Click **Generate Legend** to set **Show Database Provider** as the button name.
8. Click **Save**.

Encrypting Database Credentials

The following steps are optional:

1. Browse to [Drive Letter]:\MICROS\Simphony2\Tools\Crypt folder.
2. Run **Crypt.exe**.
3. Enter or copy the complete [CAPS HOSTED DIRECTORY]\DbSettings.xml path (for example, `[Drive Letter]:\MICROS\Simphony\IISCAPSServiceHost`).
4. Click **Read DB Settings**.
5. Select **CPServiceDB** from the drop-down list.
6. Enter the password, and then click **Encrypt Password**.

Verifying CAPS Installation

The following steps are optional:

1. Log in as the CAPS user on the Oracle database to verify the tables.
2. Verify the log files on the CAPS EGateway log and the workstation EGateway log folders.
3. Configure a new POS client workstation that points to CAPS from the Property Parameters module (Workstations tab).

   See Adding a Workstation for more information.
4. Click the **Show Database Provider** button, and then verify that **CAPS DB: as Oracle** appears.
5. Verify that the CAPS status is online.
6. Add a few test transactions from the workstation.
7. Verify that the transaction details post to the CHECKS table on the workstation datastore database, the CAPS database, and the Simphony transaction database.

Configuring IIS Application Pool Settings

Configuring Recycle Settings for the IIS Application Pool

For instructions on configuring an application pool to recycle at a scheduled time, refer to the Microsoft TechNet Library at https://technet.microsoft.com/en-us/. Ensure that the times you set do not coincide with the Start of Day (SOD) or periods of peak sales activity. If you configure the application pool to recycle at a scheduled time using the IIS Manager, consider the following recycle settings for the IIS Application Pools.

- Set the Memory Based Maximums to less than half of the available server memory.
- Set the .NET Integration mode to **Classic** for the CAPS Application Pool.
- Set the **Disable Overlapped Recycle** setting to **True** for the CAPS Application Pool.
- Leave the Application Pool's Pipeline mode settings on the default settings.

Restarting Microsoft IIS CAPS

The following steps are optional:

1. From Microsoft IIS Manager, recycle the CAPS application pool.
2. Click the configured IIS CAPS application under the website, and switch to Content View.
3. Right-click **EGateway.asmx** and select **Browse**. The new CAPS Egateway.asmx URL opens in the default internet browser.

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Printers

Printers and order devices are critical types of hardware that allow communication between the various areas of a restaurant, such as the kitchen and dining room or bar.

Print Controller

A Print Controller is a service that sends print jobs to a printer. Each POS client process has a built-in Print Controller. A workstation typically acts as a Print Controller. When a workstation operator performs an action that causes a guest check, order receipt, or other printing type to print, the POS client process does not communicate directly with the printer receiving the print job. Instead, the POS client process sends a message to the Print Controller (usually a workstation) that controls the printer. This Print Controller then receives notification that the print job succeeded or failed, and routes the success or failure information back to the workstation that sent the print job.

Ensure that employees in a revenue center know which workstations act as Print Controllers for remote printers. This knowledge helps in troubleshooting printing problems.

Oracle Hospitality recommends that you have both a primary printer and a backup printer, and that primary and backup printers reside on two different Print Controllers. This configuration prevents a single point of failure from causing multiple remote printers to stop printing.

A single Print Controller can control multiple printers. For example, one workstation can control the following printers:

- Local printer that is physically attached to the workstation (used for guest checks and customer receipts)
- Hot food printer that is a remote Ethernet kitchen printer (used for order receipts)

In this configuration, if the workstation loses power or network connectivity, other workstations cannot print to either of these printers. This is generally not a problem because the print jobs print to the backup printer as appropriate.

In another example, one workstation can control the following printers:

- Local printer that is physically attached to the workstation
- Hot food printer that is a remote Ethernet kitchen printer
- Cold food printer that is a remote Ethernet kitchen printer and backs up the hot food printer

Oracle Hospitality does not recommend this configuration. In this example, if the workstation loses power or network connectivity, other workstations cannot print to any of these printers. In this scenario, no order receipts print to the hot or cold printers in the kitchen. Kitchen operations would likely be severely impacted.

Roll Printer

A roll printer uses a roll of paper as its source media. Thermal printers and impact printers are two types of roll printers that you can use with Simphony.

Thermal Printer

A thermal printer does not use ink. Special thermal paper is provided for these printers to burn the text onto the paper. Thermal printers are primarily used as guest check and customer receipt printers. They are used infrequently in kitchens due to the heat reaction. Thermal printers are ideal in public areas as the printing operation is quiet.

Impact Printer

An impact printer is something of a retronym. All printers were impact printers prior to the invention of the thermal printer. An impact printer is primarily used in kitchens to print order receipts. Impact printers can print in black and red, and they can be used with two-ply paper.

Slip Printer

A slip printer does not contain paper. The workstation operator must add a piece (or slip) of paper per print job. Properties who use custom stationery (often containing a company logo or other similar artwork) generally use slip printers for guest checks and customer receipts. Slip printers are also used for check endorsement printing. The slips that are used by these printers are often called hard checks because they are usually made of card stock.

Slip printers are not supported when using Transaction Services Gen 1 and Simphony Transaction Services (STS) Gen 2.

Internet Protocol (IP) Printer

An IP printer communicates with the Print Controller through a computer network that uses the IP address for communication.

Bluetooth Printer

Bluetooth printing refers to printing from an Oracle MICROS Tablet E-Series to a wireless printer through the Bluetooth protocol.

There is a one-to-one relationship between a tablet and a Bluetooth printer. After you identify and configure a Bluetooth printer and manually pair it with a specific Oracle MICROS Tablet E-Series as the Print Controller Service Host, you cannot assign another Oracle MICROS Tablet E-Series to the same Bluetooth printer.

Printer Groups

If the property is large and has many printers disbursed over a wide area, you may find it useful to configure a limited list of printers that are selectable by workstation operators. The workstation operator can select a printer that is nearby from the list at the POS client (usually a mobile tablet device), and optionally set this printer as the default printer for future print jobs. When a workstation operator selects a default destination printer, the selection automatically resets at Start of Day.

A default printer group named **All Destination Printers** exists in the Printer Groups module. You cannot change this default printer group. If you do not create printer groups, all printers with the option **Destination Printer** (set in the Printers module) belong to the **All Destination Printers** printer group. The **All Destination Printers** default printer group is useful for properties that need only one group of destination printers.

Configuring a Printer

1. Select the property, click **Setup**, and then click **Printers**.
2. Insert a printer record, name the printer, and then click **OK**.
3. Double-click the printer record to open it.
4. Select the **Workstation** from the drop-down list.
5. Select the **Printer Type** from the drop-down list.

   Select **Epson Bluetooth Printer** for all Bluetooth printers.
6. If the property supports printing more than one language, select **Multi-lingual-card is installed** in the **Printer Options** section.
7. If the roll printer is a thermal printer, select **Thermal printer**.
8. Enter the number of lines to advance the guest check or customer receipt after printing the trailer text in the **Trailing Line Feeds** field.

   The value in this field defaults to the recommended trailing line feeds for the printer communication type, as listed in the following table. You can change the default value.

Table 41-1 Trailing Line Feeds per Printer Communication Type

Printer Communication Type	Trailing Number of Lines
Bluetooth	1
Ethernet	1
Integrated Device Network (IDN)	1
Serial	6
OPOS	6

9. (Optional) To set the printer to print logos, select **Enable Logo Printing**. Up until the Simphony 18.2.3 and 19.2 releases, logo printing on printers with multi-language cards was not supported.

   When configuring Epson TM-P60 and TM-T88 Ethernet Thermal printers, configure the logo to print in the center of the guest check or customer receipt by selecting the paper size of the printer from the **Center Logo Using** drop-down list.

   - Epson TM-P60 Ethernet Thermal printers: Set the paper size to **2 1/4" (58mm) Paper**.
   - Epson TM-T88 Ethernet Thermal printers: Set the paper size to **3 1/8" (80mm) Paper**.

   See Logo Printing for more information about enabling logo printing on guest checks and customer receipts.
10. To allow the printer to be selectable by workstation operators (typically used with mobile POS client devices), select **Destination Printer**.

    Bluetooth printers are not selectable.
11. Configure the appropriate values for the printer type. Specific fields become active based on the printer type you selected.

    The following table lists the printer types and indicates information for each applicable field. Enter or select information for the fields based on the printer you are configuring. Fields denoted as Not applicable are not needed for the printer type.

Table 41-2 Printer Configuration by Printer Type

Field	Roll Printer	Slip Printer	IP Printer	Bluetooth Printer
COM Port	Select the communications port for the printer. Select **COM7** for the Oracle MICROS Mini-Printer.*	Select the communications port for the printer.	Not applicable	Not applicable
Baud Rate	Select the baud rate for the printer. Select **19200** for the Oracle MICROS Mini-Printer.	Select the baud rate for the printer.	Not applicable	Not applicable
Parity	Select the parity for the printer. Select **None** for the Oracle MICROS Mini-Printer.	Select the parity for the printer.	Not applicable	Not applicable
Data Bits	Select the data bits for the printer. Select **8** for the Oracle MICROS Mini-Printer.	Select the data bits for the printer.	Not applicable	Not applicable
Stop Bits	Select the stop bits for the printer. Select **2** for the Oracle MICROS Mini-Printer.	Select the stop bits for the printer.	Not applicable	Not applicable
PIN	Not applicable	Not applicable	Not applicable	Set the four-digit passkey that must be entered into the device before printing.
ID	Not applicable	Not applicable	Not applicable	Enter the Bluetooth ID of the printer.

Table 41-2 (Cont.) Printer Configuration by Printer Type

Field	Roll Printer	Slip Printer	IP Printer	Bluetooth Printer
Number of Columns	Not applicable	Not applicable	Not applicable	This setting determines the report width so that guest checks and reports print with center alignment. By default, the width is set to **32** columns. Select **40** for Bixolon SPP-R300, SPP-R310, and R310iK Bluetooth printers.
Address	Not applicable	Not applicable	Enter the IP address or hostname of the printer. If you are using the printer for banquet checks, enter the hostname.	Not applicable
Port	Not applicable	Not applicable	Enter the port number for the IP printer.	Not applicable

*For Oracle MICROS Workstation Series 6, the COM port voltage must be manually set to 12 volts within BIOS setup in order for it to use the Mini-Printer. To configure this, click the **F2** button on the keyboard as the workstation boots, navigate to the **Advanced Tab**, and then select the **Special Configuration** option. Then, set the **COM Port Voltage** to **12 volts**, and click the **F10** button to save and exit the BIOS screen.

12. If you are configuring a printer for a Castles workstation device, perform steps 1 through 5. For this device's printer, assign the following:
    a. Select the Castles workstation device from the **Workstation** drop-down list.
    b. Select **Castles Tech S1F2 Printer** from the **Printer Type** drop-down list
13. Click **Save**. When you save these settings, the assigned Castles workstation device's serial number is linked to the assigned printer.

    See Replacing, Deleting, or Upgrading Castles S1F2 Devices for more information.
14. Select the property, click **Setup**, and then click **Workstations**.
15. Double-click the workstation to open it.
16. Click the **Printers** tab.
17. Click the **Select** link to set the appropriate **Printer** for each type of print job. Click the **Set for All Destination Printers** link to set the same printer for each type of print job.

    The printer defined here (primary or backup) always appears in the Destination Printers list on the POS client, even if you do not add it to the **Destination Printer Group**. Creating, Editing, and Removing Printer Groups contains more information.

Oracle MICROS Food and Beverage recommends you assign the same printer model and format for the backup printer to ensure that checks format properly on other printers.

18. Click the **Select** link and assign each printer type to a **Destination Printer Group**. Click the **Set for All Destination Printers** link to set the same printer type for all destination printer groups.

    Selecting a **Destination Printer Group** overrides the printer selected for the printer type.

    Printers with the option **Selectable as Destination Printer** set belong to a default **Destination Printer Group** called **All Destination Printers**.

    If you define a **Destination Printer Group** for the Backup Printer, the workstation operator is prompted at the time of printing for both the primary printer (if it has a group defined) and the Backup Printer.

19. Click the **Options** tab.

20. To automatically disable the Destination Printers prompt (if configured) when a dockable workstation (tablet device) is attached to the stand and has access to an attached printer, leave the option **60 - Prompt for Destination Printer when docked** deselected. Select option **60** to have the POS client prompt to select a printer when a workstation is docked.

21. Click **Save**.

22. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.

23. Click the **Configuration** tab, and then enter the appropriate information in the following fields:

Table 41-3 Print Output Configuration

Field	Description
Lines on First Page	Enter the maximum number of lines to print on the first page of the guest check before prompting for a new check to begin a new order receipt.
Lines on Other Pages	Enter the maximum number of lines to print on successive pages of the guest check before prompting for a new check to begin a new order receipt.
Line Feeds Before First Page	Enter the number of lines to advance before printing the guest check header. You can add extra space for the check so it appears properly in custom check presentation binders.
Line Feeds Before Other Pages	Enter the number of lines to advance before printing begins on the next successive page. The line feeds set here are included in the number configured for the Lines on Other Pages field. For example, if you set this field to 5 and set Lines on Other Pages to 30, the pages have 25 lines of text.

Table 41-3 (Cont.) Print Output Configuration

Field	Description
Minimum Lines Per Roll Check/Receipt	Enter the minimum number of lines to print on guest checks and customer receipts. Blank lines are added after printing to achieve the minimum. Use this field if you want guest checks and customer receipts that are printed on a roll printer to have a minimum length in order to fit into guest check covers.
Number of Guest Check Information Lines	Enter the number of detail lines (0 through 30) that can be entered in a System Interface Module (SIM) dialog box.
Print Tax Invoice after Sales Threshold	Enter the sales threshold needed to pass for a tax invoice to be printed for a customer.
Print Customer Information after Sales Threshold	Enter the sales threshold needed to pass for customer information to be printed for a customer.
Customer/Trade Identity Label	Enter the label information to be presented on the top of a bill after a maximum sales threshold is met. This label is either a customer's name (written in the field as **Customer Name**) or a Trade Identity Label. In the case of Australia Goods & Services Tax requirements, the trade identity label for Australia is **ABN**. This information must be present on a bill after the maximum threshold is met. The information is never stored, and the label can be changed.

24. Click the **Options** tab.
25. Select the appropriate printing options:
    - **57 - Do Not Print Change/Payment Due in Double Wide**: Select this option if you do not want double-wide formatting on the Change Due line of a receipt or the Total Due line of a check.
    - **58 - Do Not Consolidate Current Round Items in Printed Guest Check**: Select this option if you do not want to combine identical items which are ordered in multiples in the current round when printing a receipt.
    - **61 - Show Asterisk (*) indicator for Menu Item where Inclusive Tax was forgiven on screen**: Select this option if you want to display an asterisk on the receipt to indicate that the inclusive tax was forgiven for a menu item.
26. Click **Save**.

Creating, Editing, and Removing Printer Groups

1. Select the property, click **Setup**, and then click **Printer Groups**.
2. Insert a printer group record, name the printer group, and then click **OK**.
3. Double-click the printer group record to open it.
4. To add a printer to the printer group, click the **Add** link, click the ellipsis button, and then select the printer.

You can add any printer to any printer group, regardless of the **Destination Printer** option setting. You can add one printer to multiple printer groups.

5. Repeat Steps 1 through 4 for to create more printer groups and to add printers to the groups.
6. To delete a printer from a printer group, select the printer, and then click the **Delete** link.
7. Click **Save**.
8. To edit a printer group, highlight the record, change the values, and then click **Save**.
9. To remove a printer group, highlight the record, and then click **Delete** on the toolbar.

Configuring the Change Default Printer Destination Button

You need to create a button which allows workstation operators to set and reset the default printer selection.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the Front of House page on which to place the Change Default Printer Destination button,
3. On the **Edit** tab, select the page area in which to define the button.
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. From the **Type** drop-down list, select **Function**.
7. Click the black arrow beneath the **Type** drop-down list, select **Change Default Printer Destination**, and then click **OK**.
8. Position and size the button on the page. Use the Style arrow to change the color.
9. Click **Save**.

Configuring a Printer Order Device

You can configure order chits to send to a printer at the kitchen when checks are service totalled on a workstation.

1. Select the revenue center, click **Setup**, and then click **Order Devices**.
2. Insert an order device record for the printer (for example, Kitchen Hot Printer), and then double-click the record to open it.
3. On the **General** tab, select **1 - Remote** from the **Device Type** drop-down list, select **0 - Printer** from the **Primary Device Type** drop-down list, and then select the appropriate printer record from the **Device** drop-down list.
4. If you have a backup printer, select the **Backup Device** from the drop-down list.
5. From the **Order Device Redirect** drop-down list, select the printer order device that you created in Step 2.
6. From the **Menu Item Printing** drop-down list, select the items to route to this KDS:
   - **0 - All Items**: Select to route all menu items.
   - **1 - Only Items with Condiments**: Select to route only menu items with condiments.

- **2 - Only Items without Condiments**: Select to route only menu items without condiments.

7. From the **Condiment Sort Type** drop-down list, select how to sort the condiments on the order chits. Condiment sorting only works if you have set Menu Item Classes option **30 - Sort Condiments by Print Group** for the parent menu items.
   - **No condiment sorting**: Select to list condiments in the order in which they are entered on the check by the workstation operator. Allowed condiments sort in the order assigned in Condiment Sets, if configured.
   - **Sort allowed condiments**: Select to sort only allowed condiments based on the print group. The sort order configured for allowed condiments in Condiment Sets is discarded. If required condiments are ordered in between allowed condiments, the required condiments remain in the same position in which order they were ordered.
   - **Sort all condiments**: Select to sort all condiments based on the print group, regardless of condiment type.
8. Configure the following Print Settings:

Table 41-4 Order Devices Printer Settings

Field	Description
Max # Lines per Chit	Enter the maximum number of lines (0 to 99) to print on each page of an order chit. Oracle MICROS roll printers print 6 lines per inch.
Sort/Consolidation Method	Select the parent menu item sort and consolidation method for this order device.
Language	Select the primary language for the order device. This field only shows the languages that are assigned to the property in the Property Parameters module.
Language 2	To print the output in a second language, select the secondary language.
Language 3	To print the output in a third language, select the third language.
Line Feeds Before Order	Enter the number of lines to advance before printing the order on order chits.
Line Feeds After Order	Enter the number of lines to advance after printing the order on order chits.

9. Click the **Options** tab, and then select the appropriate printer options as described in the following table:

Table 41-5 Order Devices Printer Options

Option	Description
1 - On = Print Trans Emp Name and #; Off = Print Chk Emp Name and #	Select this option to print the employee name and number of the transaction operator on the order chit. Deselect to print the employee name and number of the check operator.

Table 41-5 (Cont.) Order Devices Printer Options

Option	Description
3 - Print Dopplebon	Select this option to print a separate order chit for each menu item in the current service round (dopplebon style). Deselect to print one order chit for all menu items in the current service round (the default printing style).
4 - Print Dopplebon Summary	Select this option to print an order summary chit before printing an order's dopplebon order chits. Deselect to suppress dopplebon summary chit printing
6 - Print Seat Numbers with Individual Items	Select this option to print seat numbers with each individual menu item. If the order device is set to consolidate (Sort/Consolidate Method on the General tab), the seats print as a Seat Header above the detail item.
7 - Print Revenue Center Name on Orders	Select this option to print the revenue center name with each order sent to this order device. The name prints in double-wide characters. Deselect to suppress printing the revenue center name.
9 - On = Print void marker before Void; Off = Print Void in Red	Select this option to print a `VV VOID VV` line, in red or inverse, in front of voided menu items. Deselect to print voided items in red, without the `VV Void VV` line.
10 - Print Condiments in Red (Overrides Print Class Settings)	Select this option to print condiments in red ink or in inverse. Deselect to print condiments in red/inverse or in black, depending on the Print Class Red/Black option setting.
11 - Print Both Menu Item Names	Select this option to print both names entered for a Menu Item Definition on the order chit. Deselect to print only one name. When this option is deselected, the name that prints is determined by the Menu Item Definition's Menu Item Class option **Print Name 2 on Order Output Instead of Name 1**.
13 - Print Guest Check Info Lines Before Header on Order Device	Select this option to print guest check information lines before the order device header.
14 - Print Guest Check Info Lines After Header on Order Device	Select this option to print guest check information lines after the order device header.
15 - Print Guest Check Info Lines After Trailer on Order Device	Select this option to print guest check information lines after the order device trailer.
16 - Print Secondary Items	See Secondary Printing for more information.
21 - Exclude Voids	Select this option if you do not want voids of previous round items to be sent to the kitchen.

Table 41-5 (Cont.) Order Devices Printer Options

Option	Description
22 - Intersperse Different Languages	If you are printing in more than one language, select this option to print the menu item in each language before printing any condiments. For example, the output will be menu item name in language 1, menu item name in language 2, 1st condiment in language 1, 1st condiment in language 2.
23 - Identify Combo Meals	Select this option to print a flag to denote menu items that are part of a combo meal. If printing Asian characters, the information is printed on the preceding line due to space limitations.
24 - Print Dining Course Header	Select this option to print a dining course header and to group the menu items by dining course.
25 - Format Prefix On Separate Line	Select this option to print the prefix on a separate line above the condiment. Deselect to print the prefix on the same line as the condiment that it modifies.
26 - Print Single Wide	Select this option to print orders in single-width characters. This supports longer menu item names, but has the drawback of not being as readable from a distance.

10. Click **Save**.
11. Select the property, click **Setup**, and then click **Workstations**.
12. Double-click the workstation record for which to assign the printer order device, and then click the **Order Devices** tab.
13. Select the printer order device from the Order Device Output list, and then click **Save**.

Print Class Output

You can use a Print Class to configure the output for Discounts, Service Charges, and Tender Media. This enables multiple records with a single Print Class, meaning you can define the output settings once rather than separately for each record.

A Print Class is automatically created once, only after upgrading from a previous version of Simphony. The **Print Class** field automatically defaults to the Print Class created for these records on the General tab in the Discounts, Service Charges, and Tender/Media modules. After upgrading, new records must be manually created or chosen in the Enterprise Management Console.

There are four basic print class output destinations:

1. Receipts

   Receipts print at the workstation at the end of a fast transaction. They are typically used in a quick service restaurant (QSR) environment where ordering menu items and tendering the check is performed in the same service round.

2. Guest Checks

Guest checks print at the workstation. They are typically used in a table service restaurant (TSR) environment. Checks usually include a table number or guest name and are service totalled several times before final tender.

3. Order Devices

   Order devices are remote kitchen or bar printers, or KDS devices. These devices deliver the order to the production area from the workstation.

4. Journal

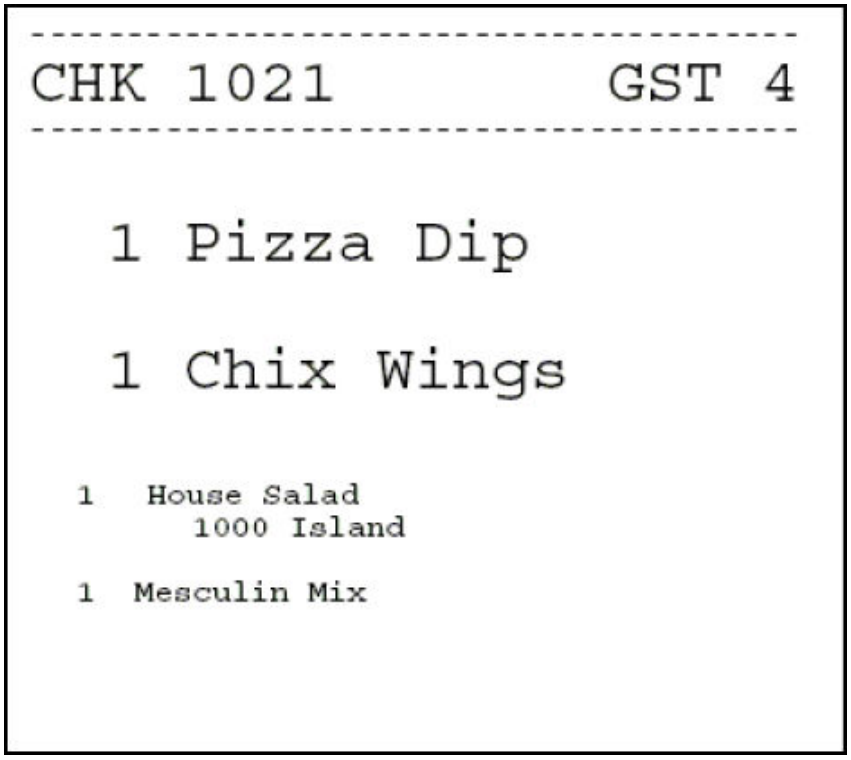
   The journal is not a physical device, but an electronic file journal that provides audit capabilities in the application.

Secondary Printing

Secondary printing enables workstation operators to print menu items to additional printers as secondary items. A secondary item is one that is part of the same order, but prepared at another Prep Station. This allows the prep cook to know what other items accompany the dish. For example, a house salad is a primary item on the cold line, but a secondary item on the hot line. When secondary printing is enabled, the cook reading the chit from the hot printer sees the items necessary for preparation at the hot line and also any items being prepared by other cooks that were added to the check at the same time. This feature allows the kitchen to synchronize orders for delivery. For example, pizza and chicken wings are set to print to the hot printer, and house salad is set to print to the cold printer. If the cook who prepares the salad does not know that the chicken wings and pizza go with the salad order, the cook might prepare the salad immediately. This can cause the salad to get warm or wilt, possibly having to be remade.

Secondary items print in a smaller font at the bottom of the order chit.

Figure 41-1 Example Order Chit with Secondary Items



Configuring Secondary Printing

1. Select the revenue center, click **Setup**, and then click **Order Devices**.
2. Double-click a printer order device record, and then click the **Options** tab.
3. Select the appropriate options that apply to secondary printing, and then click **Save**:
   - **16 - Print Secondary Items**: Select this option to allow this order device to print items sent from other printers as secondary items.
   - **17 - Broadcast Secondary Print Jobs to All Printers**: Select this option to send all items programmed to print at this order device to other printers to print as secondary items. Items print only at other printers that have **16 - Print Secondary Items** enabled.
   - **18 - Print Secondary Printer Header**: Select this option to print the name of the printer from which the secondary items are being broadcasted.
   - **19 - Print Secondary Items in Red**: Select this option to print secondary items in red.
   - **20 - Suppress Blank Lines Between Secondary Items**: Select this option to remove extra line spacing between secondary items on order chits.

Printer DIP and Memory Switch Settings

The following links explain the setup and configuration of DIP and memory switch settings:

Epson Printer Setup for IDN Module

Setup the module DIP switches as follows:

Table 41-6 Printer ID

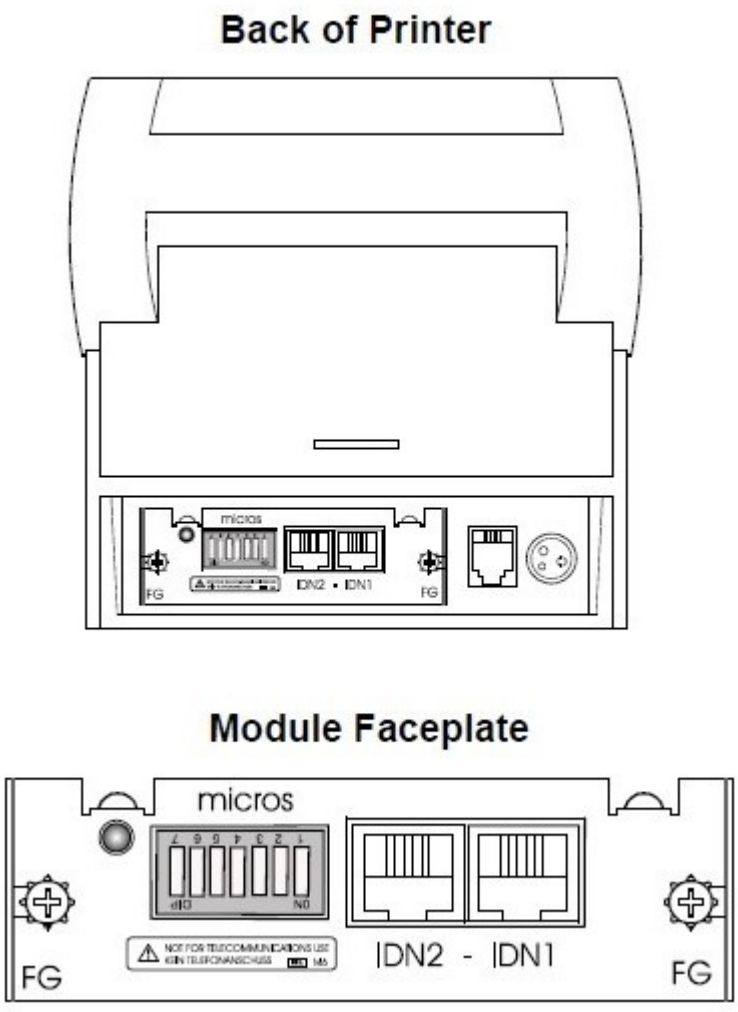
DEVICE #	DS1	DS2	DS3	DS4
01	-	-	-	ON*
02	-	-	ON	-
03	-	-	ON	ON
04	-	ON	-	-
05	-	ON	-	ON
06	-	ON	ON	-
07	-	ON	ON	ON
08	ON	-	-	-
09	ON	-	-	ON
10	ON	-	ON	-
11	ON	-	ON	ON
12	ON	ON	-	-
13	ON	ON	-	ON
14	ON	ON	ON	-
15	ON	ON	ON	ON

Table 41-7 Baud Rate

BAUD RATE	DS5	DS6
9600	-*	-*
19200	ON	-
38400	-	ON

**Factory Default*

Figure 41-2 Back of Printer and Module Faceplate



Set the annunciator to OFF by doing the following:

1. Make sure the printer is off.
2. Set the switches to the necessary parameters.
3. Turn the printer on. The Status sheet should subsequently print.

4. Turn the printer off. Set IDN switches back to their default setting.

Printer DIP Switch/Memory Switch Setting when using UB-IDN (IDN02) Interface

Table 41-8 TM-U200, TM-U220, TM-U2300

		DIP	SW	1						DIP	SW	2			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	OFF	OFF	OFF	OFF	OFF	x	ON*	x	x	x	x	x	x	x

Table 41-9 TM-T88 Series

		DIP	SW	1						DIP	SW	2			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	OFF	OFF	OFF	OFF	ON	OFF	x	x	x	x	x	x	x	x

Table 41-10 TM-T90, TM-L90 (Non-Peeler & Peeler)

		DIP	SW	1			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	ON	OFF	OFF	OFF	OFF	ON	OFF

Table 41-11 TM-T70

		DIP	SW	1						DIP	SW	2			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	OFF	OFF	OFF	OFF	ON	OFF	x	x	x	x	x	x	x	x

Table 41-12 TM-T70II

No DIP SW or Memory SW change is necessary. Use GS (E command (Fn=11)) to set Serial Port Communication Parameters.

Table 41-13 Legend

OFF	ON	= Mandatory Setting
OFF*	ON*	= Recommended Setting
x		= Don’t Care

Printer DIP Switch/Memory Switch Setting when using UB-IDML (IDNML02) Interface

Table 41-14 TM-U200A

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	ON	x	x	x	x	x	ON	ON	x	x	x	x	x	x	ON

Table 41-15 TM-U200B/D

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	ON	x	x	x	x	x	ON	ON	x	x	ON	x	x	x	x

Table 41-16 TM-U220 A/B/D (STD)

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	ON	x	x	x	x	x	ON	ON	x	x	x	x	x	x	ON

Table 41-17 TM-U220 B/D (STD US), TM-U230

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	ON	x	x	x	x	x	ON	ON	x	x	ON	x	x	x	x

Table 41-18 TM-U230 with firmware x.xx RV-EMC

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	x	ON	x	x	x	x

Table 41-19 TM-T88III/IV/V

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	ON	x	x	x	x	x	x	ON

Table 41-20 TM-T90, TM-L90 (Peeler & Non-Peeler) — DIP Switch

			DIP	SW	1		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	x	x	x	x	x

Table 41-21 TM-T90, TM-L90 (Peeler & Non-Peeler) — Memory Switch

			Mem	SW	1		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	ON	x	x	x	x	ON

Table 41-22 TM-T70

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	ON	x	x	x	x	x	x	ON

Table 41-23 TM-T70II

No DIP SW or Memory SW change is necessary.

Table 41-24 Legend

OFF	ON	= Mandatory Setting
OFF*	ON*	= Recommended Setting
x		= Don't Care

Printer DIP Switch/Memory Switch Setting when using UB-E02 (E03) Interface

Table 41-25 TM-U200A

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	ON

Table 41-26 TM-U200B/D

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	x	x	x	ON	x	x	x	x

Table 41-27 TM-U220 A/B/D (STD)

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	ON

Table 41-28 TM-U220 B/D (STD US), TM-U230

			DIP SW 1								DIP SW 2				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	x	x	x	ON	x	x	x	x

Table 41-29 TM-T88III/IV/V

			DIP SW 1								DIP SW 2				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	ON

Table 41-30 TM-T90, TM-L90 (Peeler & Non-Peeler) — DIP Switch

			DIP SW 1				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	x	x	x	x	x

Table 41-31 TM-T90, TML90 (Peeler & Non-Peeler) — Memory Switch

			Mem SW 1				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	x	x	x	x	ON

Table 41-32 TM-T70

			DIP SW 1								DIP SW 2				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	ON

Table 41-33 TM-T70II

No DIP SW or Memory SW change is necessary.

Table 41-34 Legend

OFF	ON	= Mandatory Setting
OFF*	ON*	= Recommended Setting
x		= Don’t Care

Printer DIP Switch/Memory Switch Setting when using UB-EML Interface

Table 41-35 TM-U200A

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	OFF	x	ON	OFF	OFF	ON

Table 41-36 TM-U200B/D

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	OFF	ON	OFF	OFF	OFF	x

Table 41-37 TM-U220 A/B/D (STD)

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	x	OFF	x	OFF	OFF	ON

Table 41-38 TM-U220 B/D (STD US)

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	OFF	ON	x	OFF	x	OFF

Table 41-39 TM-U230

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	OFF	ON	OFF	OFF	OFF	x

Table 41-40 TM-T88III/IV/V

			DIP	SW	1						DIP	SW	2		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	x	x	x	x	x	x	x	ON	OFF	x	x	x	OFF	OFF	ON

Table 41-41 TM-T90 — DIP Switch

			DIP	SW	1		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	x	x	x	x	x

Table 41-42 TM-T90 — Memory Switch 1

			Mem	SW	1		
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	OFF	x	OFF	OFF	ON

Table 41-43 Memory Switch 2

			Mem	SW	2		
2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
ON	x	x	x	x	x	x	x

Table 41-44 Memory Switch 8

			Mem	SW	8		
8–1	8–2	8–3	8–4	8–5	8–6	8–7	8–8
x	x	OFF	x	x	x	OFF	OFF

Table 41-45 Legend

OFF	ON	= Mandatory Setting
OFF*	ON*	= Recommended Setting
x		= Don't Care

Printer DIP Switch/Memory Switch Setting when using UB-EML02 Interface

Table 41-46 TM-U220 A/B/D (STD)

		DIP	SW	1				DIP	SW	2				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	x	OFF	x	OFF	OFF	ON

Table 41-47 TM-U220 B/D (STD US)

		DIP	SW	1				DIP	SW	2				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	ON	x	x	x	x	x	ON	ON	x	OFF	ON	x	OFF	x	OFF

Table 41-48 TM-T88IV/T88V

		DIP	SW	1				DIP	SW	2				
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	x	x	x	x	x	x	x	ON	OFF	x	x	x	OFF	OFF	ON

Table 41-49 TM-T90/L90 — DIP Switch 1

		DIP	SW	1			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	x	x	x	x	x

Table 41-50 TM-T90/L90 — Memory Switch 1

		Mem	SW	1			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	x	OFF	x	OFF	OFF	ON

Table 41-51 TM-T90/L90 — Memory Switch 2

		Mem	SW	2			
2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
ON	x	x	x	x	x	x	x

Table 41-52 TM-T90/L90 — Memory Switch 8

		Mem	SW	8			
8–1	8–2	8–3	8–4	8–5	8–6	8–7	8–8
x	x	OFF	x	x	x	OFF	OFF

Table 41-53 TM-T70

		DIP	SW	1						DIP	SW	2			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8	2–1	2–2	2–3	2–4	2–5	2–6	2–7	2–8
OFF	x	x	x	x	x	x	x	ON	OFF	x	x	x	OFF	OFF	ON

Table 41-54 TM-T70II — DIP Switch

No DIP Switch.

Table 41-55 TM-T70II — Memory Switch

		Mem	SW	1			
1–1	1–2	1–3	1–4	1–5	1–6	1–7	1–8
x	x	ON	x	OFF	x	x	x

Table 41-56 Legend

OFF	ON	= Mandatory Setting
OFF*	ON*	= Recommended Setting
x		= Don’t Care

DIP Switch Definitions

TM-U200A

1. RS-232 serial interface model

Table 41-57 DIP Switch 1

Switch No.	Function	ON	OFF	Default Settings
1	Data reception error	Ignored	Prints “?”	Off
2	Receive buffer capacity	40 bytes	ANK model: 1000 bytes Multilingual model: 512 bytes	Off
3	Handshaking	XON/XOFF	DTR/DSR	Off
4	Word length	7 bit	8 bit	Off
5	Parity check	Yes	No	Off
6	Parity selection	Even	Odd	Off
7	Baud rate selection	4800 bps	9600 bps	Off
8	BUSY condition	Receive buffer-full	Off-line Receive buffer-full	Off

Table 41-58 DIP Switch 2

Switch No.	Function	ON	OFF	Default Settings
1	Selects number of characters per line (cpl) 7x9 font / 9x9 font	42 cpl / 35 cpl	40 cpl / 33 cpl	Off
2	For internal use only (*1) (Autocutter)	Enabled	Disabled	On
3	For internal use only (*1) (Autocutter)	Asynchronous	Synchronous with clock	Off
4	Undefined	–	–	Off
5	For internal use only (*1) (Semi-autoloading)	For type A	For type B/D	On
6	For internal use only (*1) (Flash memory rewriting)	Enabled	Disabled	Off
7	Pin 6 reset signal	Used	Not used	Off
8	Pin 25 reset signal	Used	Not used	Off

2. Parallel interface model

Table 41-59 DIP Switch 1

Switch No.	Function	ON	OFF	Default Settings
1	Auto line feed	Enabled	Disabled	Off
2	Receive buffer	40 bytes	–	Off
3–7	Undefined	–	–	Off
8	Busy condition	Receive buffer-full	Off-line Receive buffer-full	Off

Table 41-60 DIP Switch 2

Switch No.	Function	ON	OFF	Default Settings
1	Selects number of characters per line (cpl) 7x9 font / 9x9 font	42 cpl / 35 cpl	40 cpl / 33 cpl	Off
2	For internal use only (*1) (Autocutter)	Enabled	Disabled	On
3	For internal use only (*1) (Interface synchronization)	Asynchronous	Synchronous with clock	Off
4	Undefined	–	–	Off
5	For internal use only (*1) (semi-autoloading)	For Type A	For type B/D	On
6	For internal use only (*1) (Flash memory rewriting)	Enabled	Disabled	Off
7	Undefined	–	–	Off
8	Pin 31 reset signal	Used	Not Used	On

TM-U200B/D

1. RS-232 serial interface model

Table 41-61 DIP Switch 1

Switch No.	Function	ON	OFF	Default B	Default D
1	Data reception error	Ignored	Prints “?”	Off	Off
2	Receive buffer capacity	40 bytes	ANK model: 1000 bytes Multilingual model: 512 bytes	Off	Off
3	Handshaking	XON/XOFF	DTR/DSR	Off	Off
4	Word length	7 bit	8 bit	Off	Off
5	Parity check	Yes	No	Off	Off
6	Parity selection	Even	Odd	Off	Off

Table 41-61 (Cont.) DIP Switch 1

Switch No.	Function	ON	OFF	Default B	Default D
7	Baud rate selection	4800 bps	9600 bps	Off	Off
8	BUSY condition	Receive buffer-full	Off-line Receive buffer-full	Off	Off

Table 41-62 DIP Switch 2

Switch No.	Function	ON	OFF	Default B	Default D
1	Selects number of characters per line (cpl) 7x9 font / 9x9 font	42 cpl / 35 cpl	40 cpl / 33 cpl	Off	Off
2	For internal use only (*1) (Autocutter)	Enabled	Disabled	On	Off
3	Pin 6 reset signal	Used	Not used	Off	Off
4	Pin 25 reset signal	Used	Not used	Off	Off
5	For internal use only (*1) (Semi-autoloading)	For type A	For type B/D	Off	Off
6	For internal use only (*1) (Flash memory rewriting)	Enabled	Disabled	Off	Off
7	For internal use only (*1) (Interface synchronization)	Asynchronous	Synchronous with clock	Off	Off
8	Undefined	–	–	Off	Off

*1: Do not change the settings of DIP switches 2–2, 2–5, 2–6, and 2–7.

2. Parallel interface model

Table 41-63 DIP Switch 1

Switch No.	Function	ON	OFF	Default B	Default D
1	Auto line feed	Enabled	Disabled	Off	Off
2	Receive buffer	40 bytes	ANK Model: 1000 bytes Multilingual mode: 512 bytes	Off	Off
3–7	Undefined	–	–	Off	Off
8	Busy condition	Receive buffer-full	Off-line Receive buffer-full	Off	Off

Table 41-64 DIP Switch 2

Switch No.	Function	ON	OFF	Default B	Default D
1	Selects number of characters per line (cpl) 7 x 9 / 9 x 9 font	42 cpl / 35 cpl	40 cpl / 33 cpl	Off	Off
2	For internal use only (*1) (Autocutter)	Enabled	Disabled	On	Off
3	Undefined	–	–	Off	Off
4	Pin 31 reset signal	Used	Not used	On	On
5	For internal use only (*1) (semi-autoloading)	For type A	For type B/D	Off	Off
6	For internal use only (*1) (Flash memory rewriting)	Enabled	Disabled	Off	Off
7	For internal use only (*1) (Interface synchronization)	Asynchronous	Synchronous with clock	Off	Off
8	Undefined	–	–	Off	Off

*1: Do not change the settings of DIP switches 2–2, 2–5, 2–6, and 2–7.

TM-U220A/B/D (STD)

1. Serial interface model

Table 41-65 DIP Switch 1

Switch No.	Function	ON	OFF	Default A	Default B	Default D
1	Data reception error	Ignored	Print “?”	Off	Off	Off
2	Receive buffer capacity	40 bytes	4 KB	Off	Off	Off
3	Handshaking	XON/XOFF	DTR/DSR	Off	Off	Off
4	Word length	7 bits	8 bits	Off	Off	Off
5	Parity check	Yes	No	Off	Off	Off
6	Parity selection	Even	Odd	Off	Off	Off
7	Transmission speed selection	4800 bps	9600 bps	Off	Off	Off
8	BUSY condition	Receive buffer-full	Offline Receive buffer-full	Off	Off	Off

Table 41-66 DIP Switch 2

Switch No.	Function	ON	OFF	Default A	Default B	Default D
1	Selects number of characters per line (cpl) (*)	42 cpl / 35 cpl	40 cpl / 33 cpl	Off	Off	Off

Table 41-66 (Cont.) DIP Switch 2

Switch No.	Function	ON	OFF	Default A	Default B	Default D
2	Reserved (Autocutter)	Enabled	Disabled	On	On	Off
3	Undefined	—	–	Off	Off	Off
4	Serial communication set selection	By memory switch	By DIP switch	Off	Off	Off
5	Undefined	–	—	Off	Off	Off
6	Reserved (Flash memory rewriting)	Enabled	Disabled	Off	Off	Off
7	Pin 6 reset signal	Used	Not used	Off	Off	Off
8	Pin 25 reset signal	Used	Not used	Off	Off	Off

(*) Selection of dots between characters: On = 2 half dots, Off = 3 half dots

The number of characters per line in the Table indicates for the 76 mm-width paper.

2. Parallel interface model

Table 41-67 DIP Switch 1

Switch No.	Function	ON	OFF	Default A	Default B	Default D
1	Auto line feed	Enabled	Disabled	Off	Off	Off
2	Receive buffer	40 bytes	4KB	Off	Off	Off
3	Undefined	–	–	Off	Off	Off
4	Undefined	–	–	Off	Off	Off
5	Undefined	–	–	Off	Off	Off
6	Undefined	–	–	Off	Off	Off
7	Undefined	–	–	Off	Off	Off
8	BUSY condition	Receive buffer-full	Offline Receive buffer-full	Off	Off	Off

Table 41-68 DIP Switch 2

Switch No.	Function	ON	OFF	Default A	Default B	Default D
1	Selects number of characters per line (cpl) (*)	42 cpl / 35 cpl	40 cpl / 33 cpl	Off	Off	Off
2	Reserved (Autocutter)	Enabled	Disabled	On	On	Off
3	Undefined	–	–	Off	Off	Off
4	Undefined	–	–	Off	Off	Off
5	Undefined	–	–	Off	Off	Off

Table 41-68 (Cont.) DIP Switch 2

Switch No.	Function	ON	OFF	Default A	Default B	Default D
6	Reserved (Flash memory rewriting)	Enabled	Disabled	Off	Off	Off
7	Undefined	–	–	Off	Off	Off
8	Pin 31 reset signal	Used	Not used	On	On	On

(*) Selection of dots between characters: On = 2 half dots, Off = 3 half dots.

The number of characters per line in the Table indicates for the 76 mm-width paper.

TM-U220B/D (US STD)

1. Serial interface model

Table 41-69 DIP Switch 1

Switch No.	Function	ON	OFF	Default B	Default D
1	Printing mode	Right side up printing mode	Normal printing mode	Off	Off
2	Receive buffer capacity	40 bytes	4KB	Off	Off
3	Handshaking	XON/XOFF	DTR/DSR	Off	Off
4	Word length	7 bits	8 bits	Off	Off
5	Parity check	Yes	No	Off	Off
6	Parity selection	Even	Odd	Off	Off
7	Transmission speed selection	4800 bps	9600 bps	Off	Off
8	BUSY condition	Receive buffer-full	Offline Receive buffer-full	Off	Off

Table 41-70 DIP Switch 2

Switch No.	Function	ON	OFF	Default B	Default D
1	Selects number of characters per line (cpl) (*)	42 cpl / 35 cpl	40 cpl / 33 cpl	Off	Off
2	Reserved (Autocutter)	Enabled	Disabled	On	Off
3	Pin 6 reset signal	Used	Not used	Off	Off
4	Pin 25 reset signal	Used	Not used	Off	Off
5	Undefined	–	–	Off	Off
6	Reserved (Flash memory rewriting)	Enabled	Disabled	Off	Off
7	Undefined	–	–	Off	Off

Table 41-70 (Cont.) DIP Switch 2

Switch No.	Function	ON	OFF	Default B	Default D
8	Serial communication set selection	By memory switch	By DIP switch	Off	Off

(*) Selection of dots between characters: On = 2 half dots, Off = 3 half dots.

The number of characters per line in the Table indicates for the 76 mm-width paper.

2. Parallel interface model

Table 41-71 DIP Switch 1

Switch No.	Function	ON	OFF	Default B	Default D
1	Printing mode	Right side up printing mode	Normal printing mode	Off	Off
2	Receive buffer	40 bytes	4KB	Off	Off
3	Undefined	–	–	Off	Off
4	Undefined	–	–	Off	Off
5	Undefined	–	–	Off	Off
6	Undefined	–	–	Off	Off
7	Undefined	–	–	Off	Off
8	BUSY condition	Receive buffer-full	Offline Receive buffer-full	Off	Off

Table 41-72 DIP Switch 2

Switch No.	Function	ON	OFF	Default B	Default D
1	Selects number of characters per line (cpl) (*)	42 cpl / 35 cpl	40 cpl / 33 cpl	Off	Off
2	Reserved (Autocutter)	Enabled	Disabled	On	Off
3	Undefined	–	–	Off	Off
4	Pin 31 reset signal	Used	Not used	On	On
5	Undefined	–	–	Off	Off
6	Reserved (Flash memory rewriting)	Enabled	Disabled	Off	Off
7	Undefined	–	–	Off	Off
8	Undefined	–	–	Off	Off

(*) Selection of dots between characters: On = 2 half dots, Off = 3 half dots.

The number of characters per line in the Table indicates for the 76 mm-width paper.

TM-T88III/IV/V and TM-T70

1. Serial interface specification

Table 41-73 DIP Switch 1

SW 1	Function	ON	OFF	Factory Setting
1	Data reception error	Ignored	Prints “?”	OFF
2	Receive buffer capacity	45 bytes	4 KB	OFF
3	Handshaking	XON/XOFF	DTR/DSR	OFF
4	Word length	7 bits	8 bits	OFF
5	Parity check	Yes	No	OFF
6	Selection of parity	Even	Odd	OFF
7	Selection of transmission speed	See Table 18	See Table 18	ON
8	Selection of transmission speed	See Table 18	See Table 18	OFF

Table 41-74 Transmission Speed

Transmission speed (bps)	SW 1–7	SW 1–8
(*1)	ON	ON
4800	OFF	ON
9600	ON	OFF
19200	OFF	OFF

bps: bits per second

Table 41-75 DIP Switch 2

SW 2	Function	ON	OFF	Factory Setting
1	Handshaking (Condition or BUSY)	Receive buffer full	Offline Receive buffer-full	OFF
2	Reserved (Do not change settings)	Fixed to OFF	Fixed to OFF	OFF
3	Selects print density	See Table 20	See Table 20	OFF
4	Selects print density	See Table 20	See Table 20	OFF
5	Setting the conditions that cancel the receive buffer BUSY state (This function is effective when the receive buffer capacity is set to 4 KB.)	Cancels the BUSY state when the remaining capacity of the receive buffer reaches 138 bytes.	Cancels the BUSY state when the remaining capacity of the receive buffer reaches 256 bytes.	OFF
6	Reserved (Do not change settings)	Fixed to OFF	Fixed to OFF	OFF
7	I/F pin 6 reset signal	Enabled	Disabled	OFF
8	I/F pin 25 reset signal	Enabled	Disabled	OFF

Table 41-76 DIP Switch 2–3 and 2–4

Switch No. 3	Switch No. 4	Function
OFF	OFF	Print density (Standard)
ON	OFF	Print density (Medium)
OFF	ON	Print density (Dark)
ON	ON	Prohibited

2. Parallel interface specification

Table 41-77 DIP Switch 1

SW	Function	ON	OFF	Factory Setting
1	Auto line feed	Always enabled	Always disabled	OFF
2	Receive buffer capacity	45 bytes	4 KB	OFF
3	Selects paper sensors to output paper-end signals (default value of ESC c 3)	Disabled	Roll paper end sensor enabled; roll paper near-end sensor enabled	OFF
4	Sets error signal	Disabled	Enabled	OFF
5–8	Undefined	–	–	OFF

Table 41-78 DIP Switch 2

SW	Function	ON	OFF	Factory Setting
1	Handshaking (Condition for BUSY)	Receive buffer full	Offline Receive buffer full	OFF
2	Reserved (Do not change settings)	Fixed to OFF	Fixed to OFF	OFF
3	Selects print density	See Table 23	See Table 23	OFF
4	Selects print density	See Table 23	See Table 23	OFF
5	Setting the conditions that cancel the receive buffer BUSY state (this function is effective when the capacity of the receive buffer is set to 4 KB).	Cancels the BUSY state when the remaining capacity of the receive buffer reaches 138 bytes.	Cancels the BUSY state when the remaining capacity of the receive buffer reaches 256 bytes.	OFF
6	Reserved (Do not change settings)	Fixed to OFF	Fixed to OFF	OFF
7	Reserved (Do not change settings)	Fixed to OFF	Fixed to OFF	OFF
8	Interface pin 31 reset signal (Do not change settings)	Fixed to ON	Fixed to ON	ON

Table 41-79 DIP Switch 2–3 and 2–4

3	4	Function
OFF	OFF	Print density (Standard)
ON	OFF	Print density (Medium)
OFF	ON	Print density (Dark)
ON	ON	Prohibited

TM-T70II

Table 41-80 Memory Switch 1

Memory Switch	Function	Setting Value — 48 (OFF)	Setting Value — 49 (ON)	Defaults
1–1	(Reserved)	–	–	48 (OFF)
1–2	Receive buffer capacity	4 KB	45 bytes	48 (OFF)
1–3	Condition for BUSY	Receive buffer full or offline	Receive buffer full	48 (OFF)
1–4	Data processing for receiving error	Replaced with “?”	Ignored	48 (OFF)
1–5	Automatic line feed	Always disabled	Always enabled	48 (OFF)
1–6	(Reserved)	–	–	48 (OFF)
1–7	(Reserved)	–	–	48 (OFF)
1–8	(Reserved)	–	–	48 (OFF)

Table 41-81 Memory Switch 2

Memory Switch	Function	Setting Value — 48 (OFF)	Setting Value — 49 (ON)	Defaults
2–1 to 2–8	(Reserved)	–	–	48 (OFF)

Table 41-82 Memory Switch 3

Memory Switch	Function	Setting Value — 48 (OFF)	Setting Value — 49 (ON)	Defaults
3–1 to 3–8	(Reserved)	–	–	48 (OFF)

Table 41-83 Memory Switch 4

Memory Switch	Function	Setting Value — 48 (OFF)	Setting Value — 49 (ON)	Defaults
4–1 to 4–8	(Reserved)	–	–	48 (OFF)

Table 41-84 Memory Switch 5

Memory Switch	Function	Setting Value — 48 (OFF)	Setting Value — 49 (ON)	Defaults
5–1	Sets USB power-saving function *1	Enabled	Disabled	48 (OFF)
5–2	Sets recovery conditions from receive buffer BUSY (Enabled when the receive buffer capacity is set to 4 KB)	Recovers when the remaining receive buffer capacity becomes 256 bytes	Recovers when the remaining receive buffer capacity becomes 138 bytes	48 (OFF)
5–3	Selects paper sensors to output paper-end signals (default value of ESC c 3)	Roll paper end sensor enabled; roll paper near-end sensor enabled	Disabled	48 (OFF)
5–4	Sets error signal	Enabled	Disabled	48 (OFF)
5–5	(Reserved)	–	–	48 (OFF)
5–6	(Reserved)	–	–	48 (OFF)
5–7	(Reserved)	–	–	48 (OFF)
5–8	(Reserved)	–	–	48 (OFF)

*1: Valid only when the USB interface communication condition is set to the vendor-defined class and the system configuration is set so that the USB driver can support the USB power-saving function.

Function 11

<Function 11> **GS (E *pL pH fn a d1...dk*** (*fn* = 11)

[Name] Set the configuration item for the serial interface

[Format]

ASCII	GS	(	E	*pL*	*pH*	*fn*	*a*	*d1 ... dk*
Hex	1D	28	45	*pL*	*pH*	*fn*	*a*	*d1 ... dk*
Decimal	29	40	69	*pL*	*pH*	*fn*	*a*	*d1 ... dk*

[Range] $3 \le (pL + pH \times 256) \le 65535$ $(0 \le pL \le 255, 0 \le pH \le 255)$
$fn = 11$
$1 \le a \le 4$
$48 \le d \le 57$

[Default (upon shipment)]
d1...dk = "115200" [ANK model, Japanese model, South Asia model]
d1...dk = "9600" [Traditional Chinese model, Simplified Chinese model]
d1...dk = "38400" [ANK model (T88V command compatibility mode enabled)]

Function 11 — Descriptions

- Sets the configuration item for the serial interface specified by *a* to the values specified by *d*.

a	Configuration Item
1	Transmission speed
2	Parity
3	Handshaking
4	Bit length

- Transmission speed settings (*a* = 1)

d1...dk	Transmission Speed
“2400”	2400 bps
“4800”	4800 bps
“9600”	9600 bps
“19200”	19200 bps
“38400”	38400 bps
“57600”	57600 bps
“115200”	115200 bps

- Parity settings (*a* =2)

d1	Parity
48	None
49	Odd
50	Even

- Handshaking settings (*a* = 3)

d1	Handshaking
48	DTR/DSR control
49	XON/XOFF control

- Bit length settings (*a* = 4)

d1	Bit Length
55	7 bits
56	8 bits

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Logo Printing

You can print the logo of your Enterprise, property, or revenue center on guest checks, customer receipts, and credit card vouchers. Simphony only supports monochrome bitmap image files. Use Microsoft Paint to convert an image to a monochrome bitmap. Adhere to the following rules governing the size of your logo:

- The image area must not exceed 98,304 pixels. (Keep in mind that a logo that is 512 x 384 pixels exceeds 98,304 pixels.)
- The image width must not exceed 512 pixels.
- The image height must not exceed 384 pixels.
- The bitmap file must not exceed 8 kilobytes in size.

You can configure print tasks to print more than one logo (on either the Header or Trailer sections, or both). The printer loads one image at a time when printing a check, receipt, or credit card voucher. The time it takes to print depends on the number of images the printer has to load.

Beginning with the Simphony 19.2 release, logo printing is now also supported on:

- OPOS printers with multi-language cards installed
  - Configuring logo printing for OPOS printers is no different from other printers in the Simphony EMC.
  - For specific third-party printer installation instructions, access the vendor's website.

Complete the following tasks to set up logo printing:

- Upload a logo to Simphony
- Assign a logo to guest checks, customer receipts, and credit card vouchers
- Set the printer to print the logo
- Ensure the DIP settings for the printer's buffer are set to the higher value to accommodate the logo's additional data

Printer DIP and Memory Switch Settings contains more information on DIP settings.

Uploading a Logo to Simphony

1. Select the Enterprise level, click **Configuration**, and then click **Print Logos**.
2. Insert a new record, and then double-click it to open in form view.
3. Click **Load Image**.
4. Select the image, and then click **Open** to upload it to Simphony. After the logo uploads, an image preview appears.
5. Alternately, you can copy the image to your clipboard, and then click **Paste Image** to upload it to Simphony.
6. Click **Save**.

Assigning a Logo to Guest Checks and Customer Receipts

1. Select the Enterprise, property, revenue center, or zone, click **Descriptors**, and then click **Guest Check Headers**.
2. Select a check box in the **Use Logo** column.

   If you select **Use Logo** for an existing record that has content in the **Text** column, that text no longer appears on printed guest checks and customer receipts.
3. Click the ellipsis point (...) button in the **Logo** column, select the image you uploaded, and then click **OK**.
4. Click **Save**.
5. To assign the logo to customer receipts and guest check trailers, repeat these steps, selecting the **Guest Check Trailers** and **Customer Receipt Headers** modules in Step 1.

   You must also select **28 - Print Guest Check Trailer on Fast Transaction Customer Receipt** for tender records from the Tender/Media options. If you do not set this option, trailers do not print on customer receipts when the tender is used to close a fast transaction.
6. Click **Save**.

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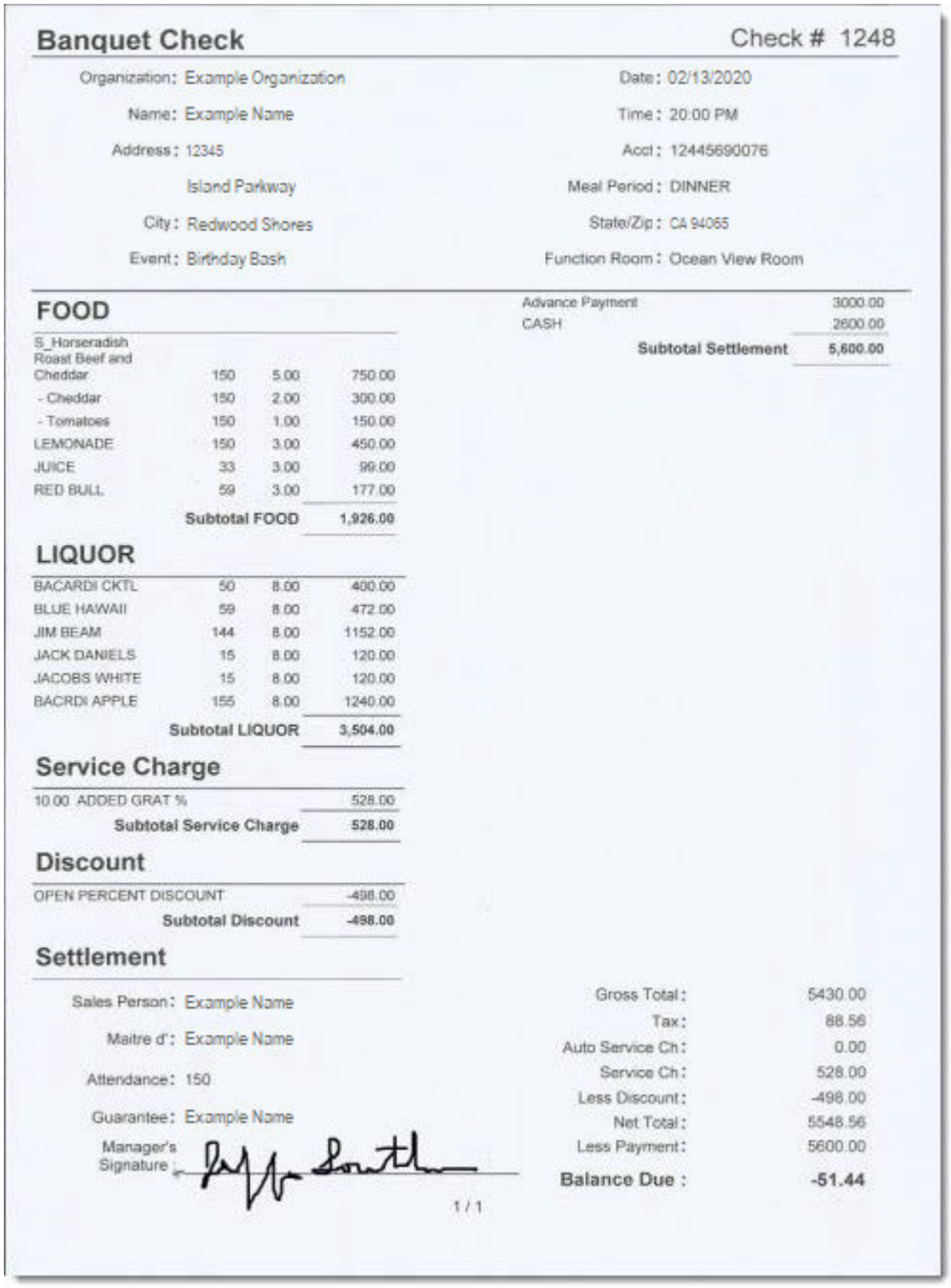
Banquet Guest Check Printing

This chapter discusses the configuration and usage of the Banquet Guest Check Printing feature.

A Banquet Guest Check is used to present a specially formatted guest check for customers. Even though it can be used anywhere, the banquet guest check is intended for use in a banquet environment. In this environment, there are additional components of information which can be reflected on a guest check. Information such as the event name, address, contact information, name of the function room the event was held, names of the maitre'd and catering sales manager, and the event's serving period.

One format of the Banquet Guest Check is available, utilizing an 8.5 x 11 page output and prints on a custom page printer.

Figure 43-1 Example of a Printed Banquet Guest Check



Banquet Check — Check # 1248

Organization: Example Organization
Name: Example Name
Address: 12345
Island Parkway
City: Redwood Shores
Event: Birthday Bash

Date: 02/13/2020
Time: 20:00 PM
Acct: 12445690076
Meal Period: DINNER
State/Zip: CA 94065
Function Room: Ocean View Room

FOOD

S_Horseradish Roast Beef and Cheddar	150	5.00	750.00
- Cheddar	150	2.00	300.00
- Tomatoes	150	1.00	150.00
LEMONADE	150	3.00	450.00
JUICE	33	3.00	99.00
RED BULL	59	3.00	177.00
Subtotal FOOD			**1,926.00**

LIQUOR

BACARDI CKTL	50	8.00	400.00
BLUE HAWAII	59	8.00	472.00
JIM BEAM	144	8.00	1152.00
JACK DANIELS	15	8.00	120.00
JACOBS WHITE	15	8.00	120.00
BACRDI APPLE	155	8.00	1240.00
Subtotal LIQUOR			**3,504.00**

Service Charge

10.00 ADDED GRAT %	528.00
Subtotal Service Charge	**528.00**

Discount

OPEN PERCENT DISCOUNT	-498.00
Subtotal Discount	**-498.00**

Settlement

Advance Payment	3000.00
CASH	2600.00
Subtotal Settlement	**5,600.00**

Sales Person: Example Name
Maitre d': Example Name
Attendance: 150
Guarantee: Example Name
Manager's Signature:

Gross Total:	5430.00
Tax:	88.56
Auto Service Ch:	0.00
Service Ch:	528.00
Less Discount:	-498.00
Net Total:	5548.56
Less Payment:	5600.00
Balance Due :	**-51.44**

1 / 1

Configuring Employee Privileges for Banquet Guest Check Printing

Operators must be assigned Role privileges to be allowed to configure and utilize Banquet Guest Check printing functionality. To assign privileges to employees for this feature:

To Configure the Role Option to Begin a Banquet Check By Prompt

Prerequisite: The operator already has access to a **Begin Check By Prompt** function touchscreen button.

1. Access the EMC and select the enterprise level, click the **Configuration** tab, and then click **Roles**.
2. Select or create an employee role and toggle to Form view.
3. Click the **Operations** tab, and then click the **Guest Checks** tab.
4. From the Add/Transfer/Pickup Options section, enable the **199 - Begin Check by Prompt** option and **Save**.
5. Access and sign onto a point-of-sale (POS) workstation.
6. Press the **Begin Check by Prompt** button.

To Configure the Role Option to Edit a Banquet Check By Prompt

Prerequisite: The operator already has access to a **Begin Check By Prompt** function touchscreen button.

1. Access the EMC and select the enterprise level, click the **Configuration** tab, and then click **Roles**.
2. Select or create an employee role and toggle to Form view.
3. Click the **Operations** tab, and then click the **Guest Checks** tab.
4. From the Check Editing Options section, enable the **200 - Edit Check by Prompt** option and **Save**.
5. Access and sign onto a point-of-sale (POS) workstation.
6. Open a banquet check from the check listing.
7. Select a header and press the **Edit Prompt** button.

To Configure the Prompt for Authorization to Create a Banquet Check

Prerequisite: The operator already has access to a **Begin Check By Prompt** function touchscreen button.

If you want to require only privileged users to authorize beginning and printing banquet checks:

1. Access the EMC and select the enterprise level, click the **Configuration** tab, and then click **Roles**.
2. From the Add/Transfer/Pickup Options section, disable the **199 - Begin Check by Prompt** option for all non-privileged users roles and **Save**.
3. Access and sign onto a point-of-sale (POS) workstation.
4. Press the **Begin Check by Prompt** button.
5. Have a privileged user enter their authorization code to begin the check.

To Configure the Prompt for Authorization to Edit a Banquet Check

Prerequisite: The operator already has access to a **Begin Check By Prompt** function touchscreen button.

If you want to require only privileged users to authorize editing and printing banquet checks:

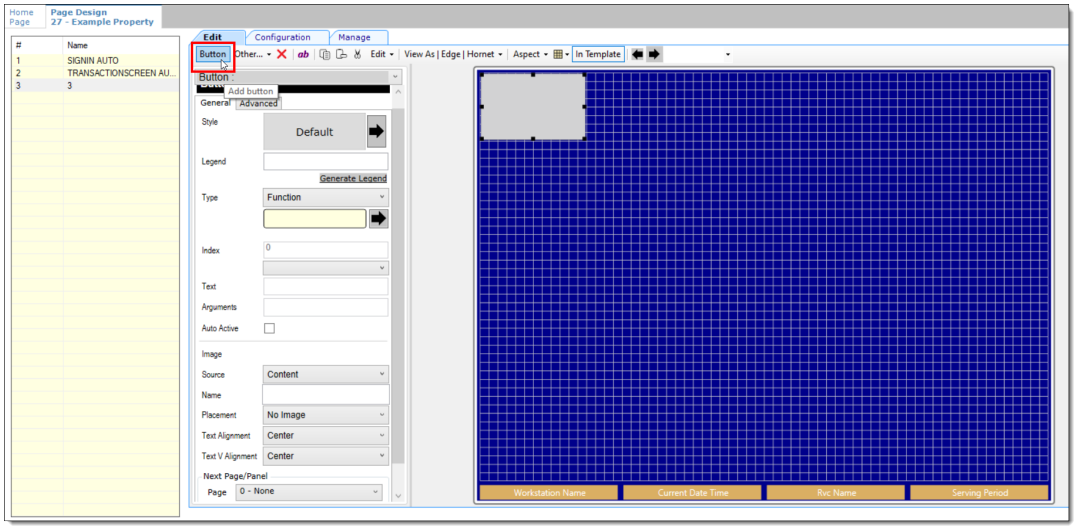
1. Access the EMC and select the enterprise level, click the **Configuration** tab, and then click **Roles**.
2. From the Check Editing Options section, disable the **200 - Edit Check by Prompt** option for all non-privileged users roles and **Save**.
3. Access and sign onto a point-of-sale (POS) workstation.
4. Open a banquet check from the check listing.
5. Select a header and press **Edit Prompt**.
6. Have a privileged user enter their authorization code to edit the check.

Configuring Banquet Guest Check Buttons and Prompts

To configure the Begin Banquet Guest Check for point-of-sale (POS) workstation touchscreens:

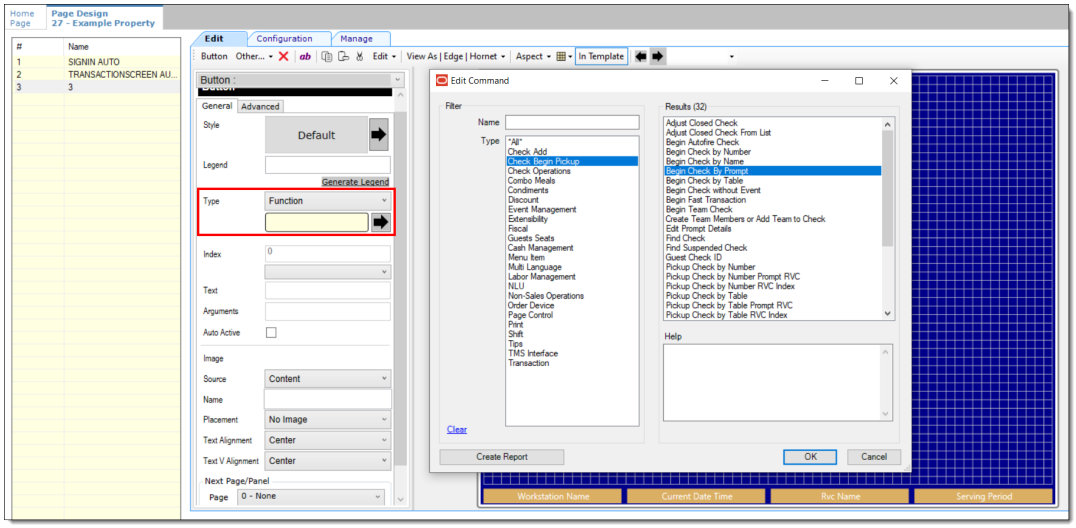
1. Access the EMC and select the Enterprise, Property, Revenue Center, or Zone, click the **Configuration** tab, and then select **Page Design**.
2. You can configure an existing touchscreen or add a new one. Add a new button.

Figure 43-2 Page Design – Add Button



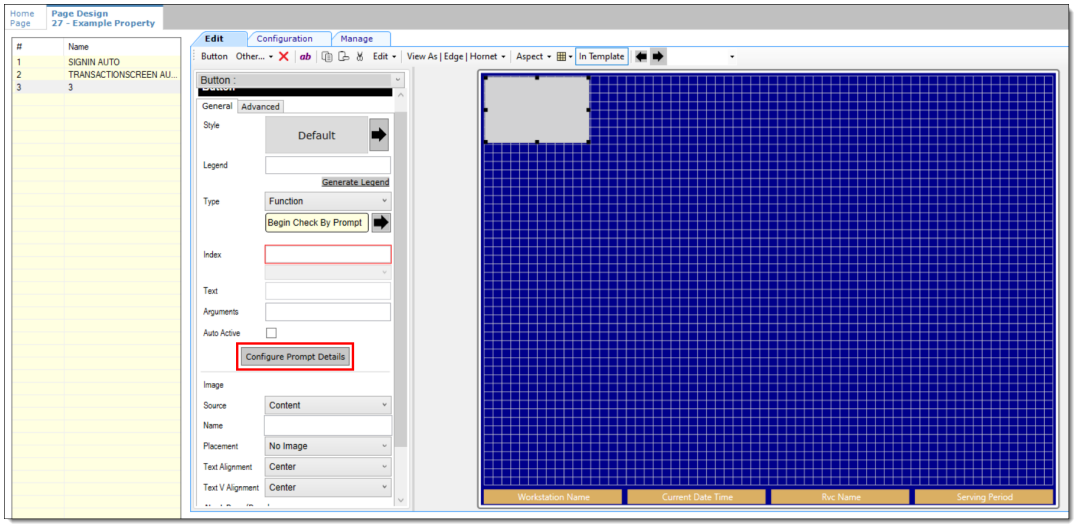
3. From the **Type** drop-down list, select **Function**, select the **Begin Check By Prompt** function, and then click **OK**.

Figure 43-3 Page Design – Begin Check By Prompt Function



4. Click the **Configure Prompt Details** button.

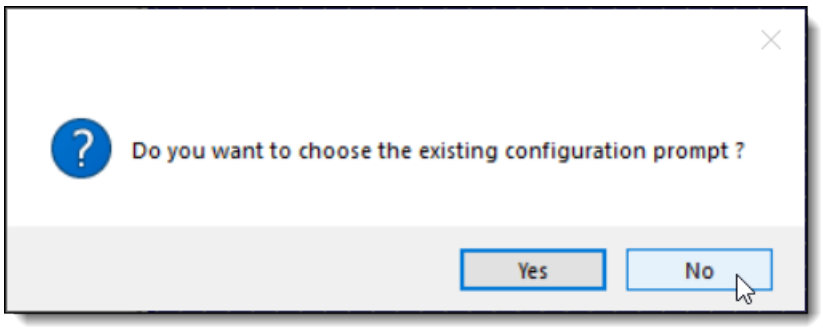
Figure 43-4 Page Design – Configure Prompt Details



Option 1 – Clicking the 'No' Button

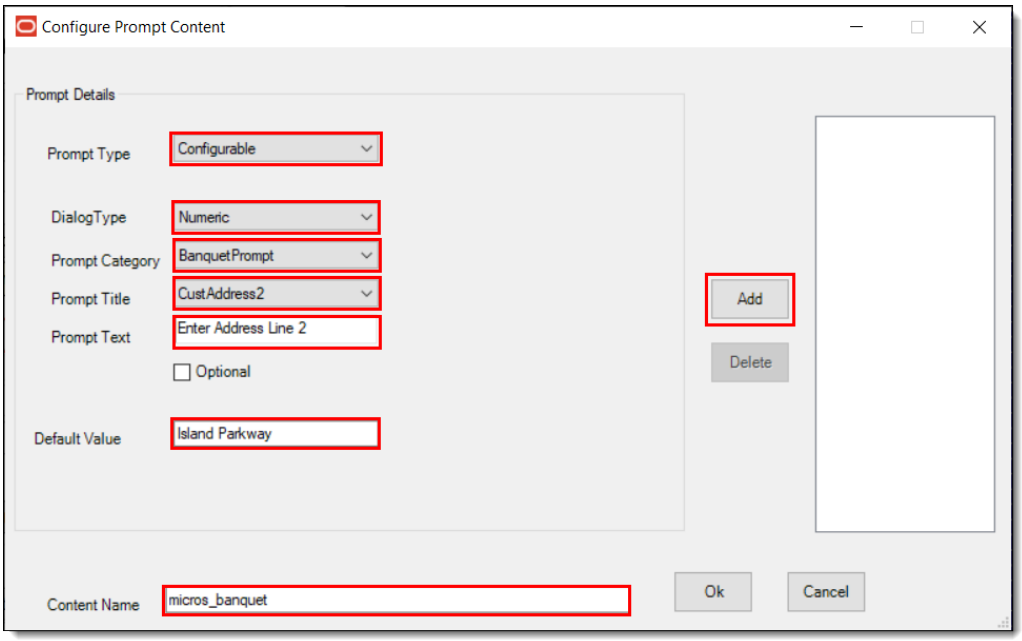
1. Click **No** when prompted.

Figure 43-5 Configure Prompt Details 'No' Response



2. From the Prompt Details section, configure the following:
   a. From the **Prompt Type** field, select **Configurable**.
   b. From the **Dialog Type** field, select a type from the drop-down list.
   c. From the **Prompt Category** field, select **BanquetPrompt**.
   d. From the **Prompt Title** field, select a title category from the drop-down list.
   e. From the **Prompt Text** field, enter the appropriate text based on the Prompt Title setting.
   f. From the **Content Name** field, enter a name for your banquet content.
   g. Click the **Add** button, and then click **Ok**.

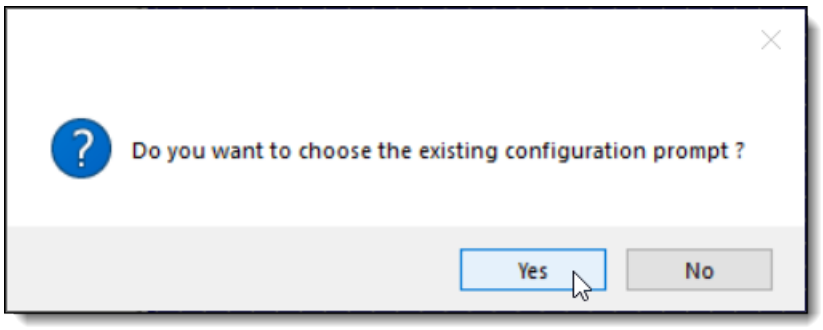
Figure 43-6 Configure Prompt Content Window - Prompt Details



Option 2 – Clicking the 'Yes' Button

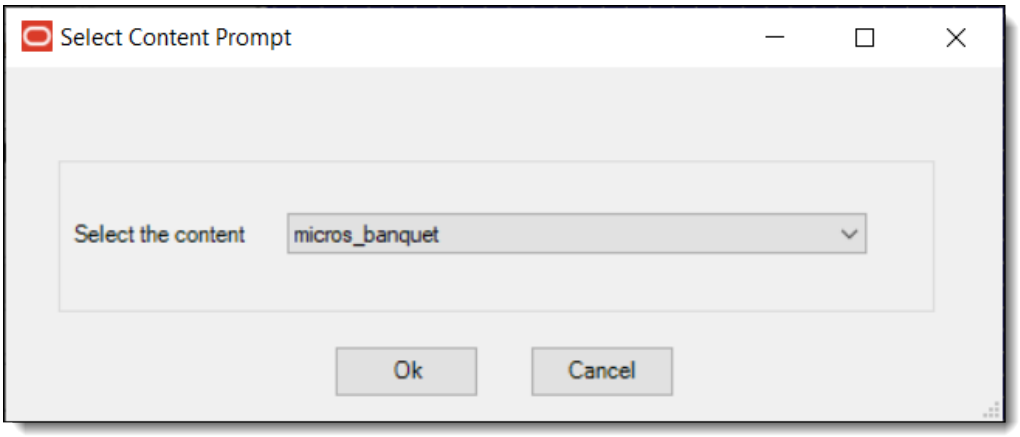
1. A prompt asks you to choose the existing configuration prompt to set, or select the prompt content.

Figure 43-7 Configure Prompt Details 'Yes' Response



- Selecting **Yes** displays a list of all the existing configuration file names in the Content table.

Figure 43-8 Select Existing Content Prompt



- As mentioned previously, selecting **No** allows you to set the prompts and save details in the Content table. Specify the name of the content.

2. As shown in Figure 42-6 above, configure the Prompt Type, Dialog Type, Prompt Category, Prompt Title, Prompt Text, Default Value, and then enter a Content Name. Click **Add** and **Ok**.

> **Note:**
>
> The **Optional** check-box allows the prompt to bypass the next screen and allows the user to click **OK**.

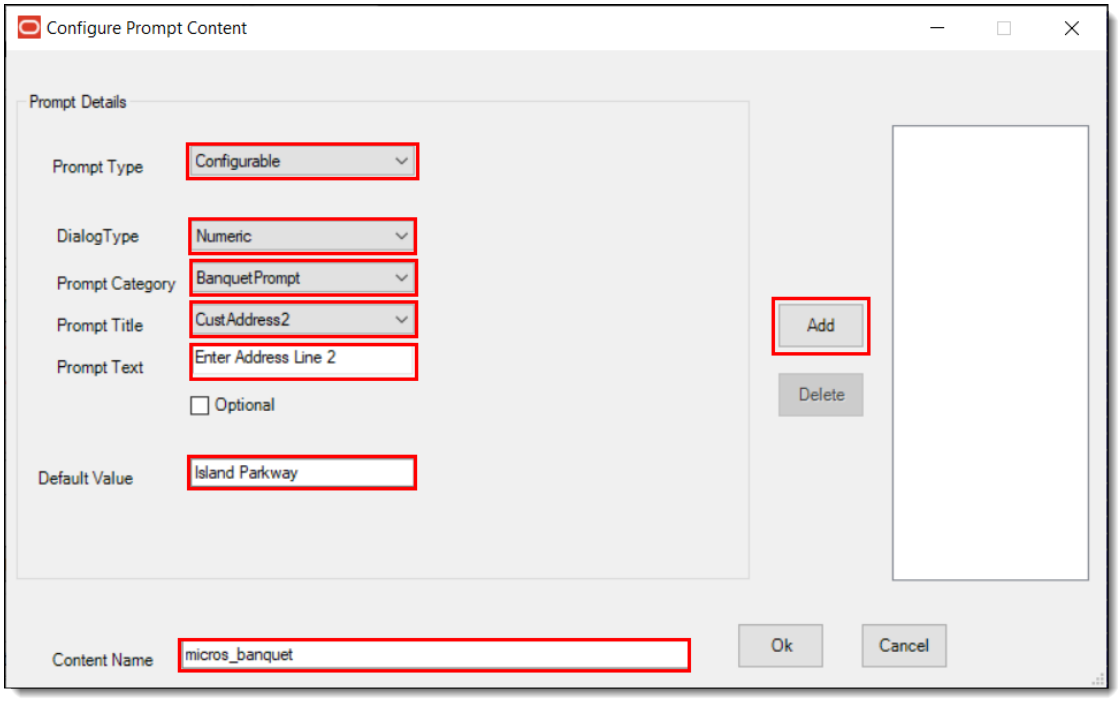
- There are a number of options when configuring prompt content. Prompt Types can be Configurable or Non-Configurable. Dialog Types include AlphaNumeric, Numeric, List, and by Date. Users must select from the following list of configurable prompt items that can be used for a Banquet Check:
  - name="lblOrganization" >**Organization**
  - name="lblAcct" >**Acct**

- name="lblCustName" >**Name**
- name="lblCustAddress1" >**Address Line 1**
- name="lblCustAddress2" >**Address Line 2**
- name="lblCustCity" >**City**
- name="lblState" >**State**
- name="lblZip" >**Zip**
- name="lblDate" >**Date**
- name="lblTime" >**Time**
- name="lblEvent" >**Event**
- name="lblSalesperson" >**Sales Person**
- name="lblMaitred" >**Maitre D'**
- name="lblGuarantee" >**Guarantee**

Configurable Prompt Type

The example below illustrates a Configurable Prompt Type. When this type is configured, users are prompted to enter the requested information at the POS workstation — in this case, a selection of function rooms.

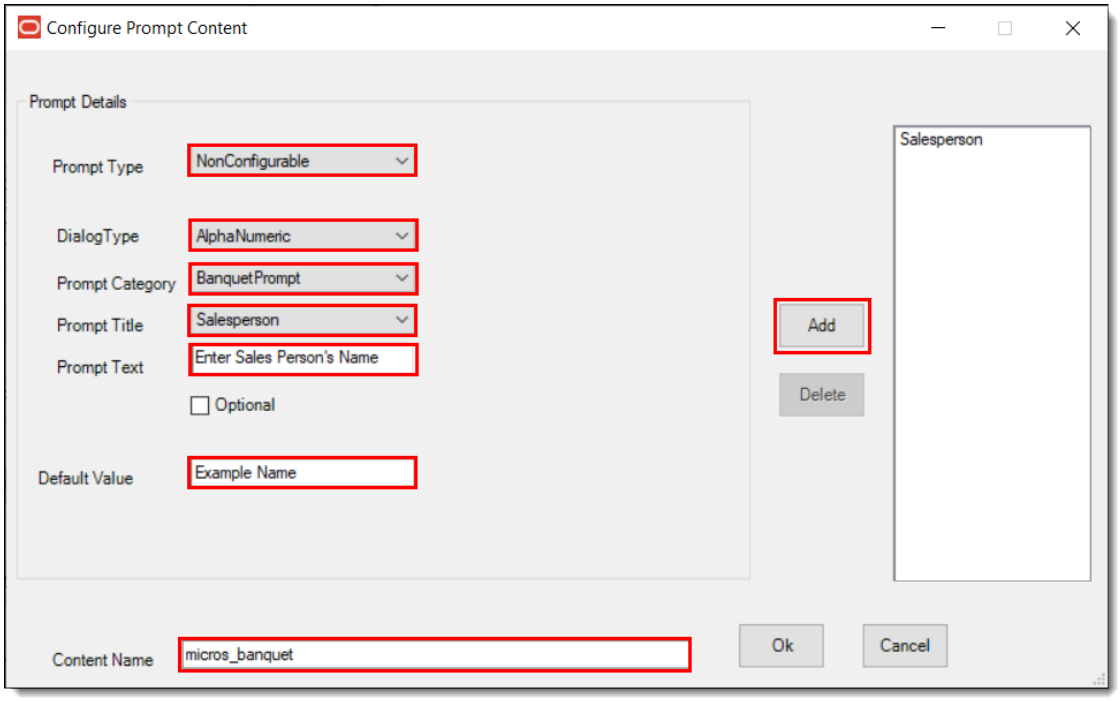
Figure 43-9 Configure Prompt Content Window - Configurable Type



Non-Configurable Prompt Type

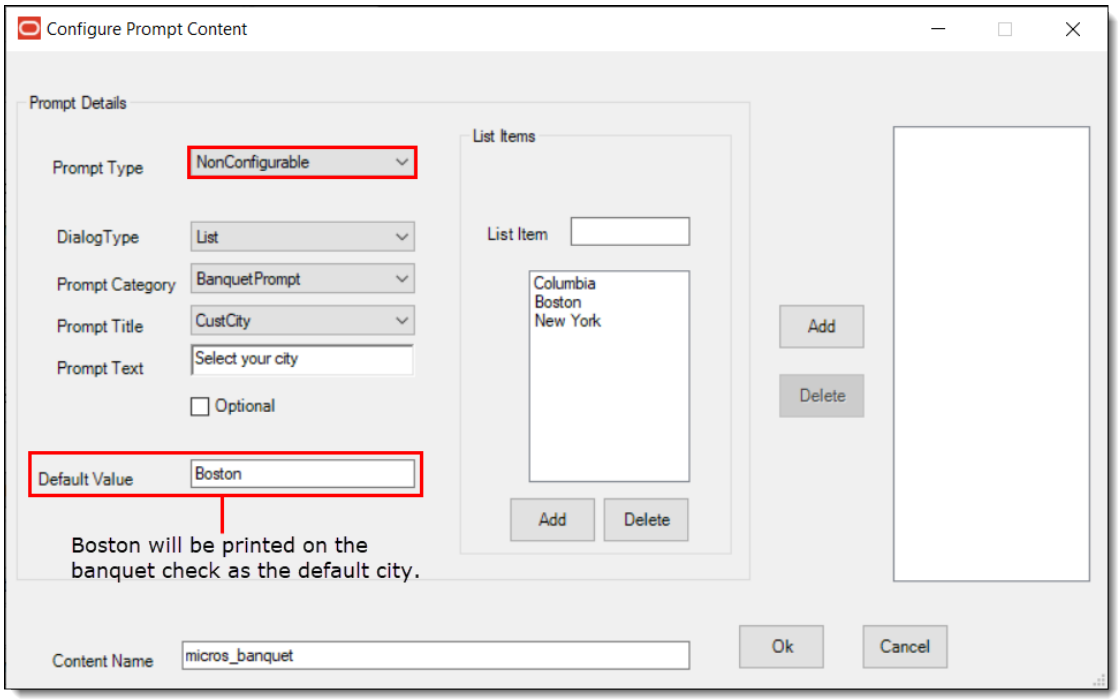
Non-Configurable prompts are not sent to users when beginning a Banquet Check. Regardless of the assigned Dialog Type (e.g., Alphanumeric, Numeric, List , or Date), users are not prompted to enter information.

Figure 43-10 Configure Prompt Content Window - Non-Configurable Type



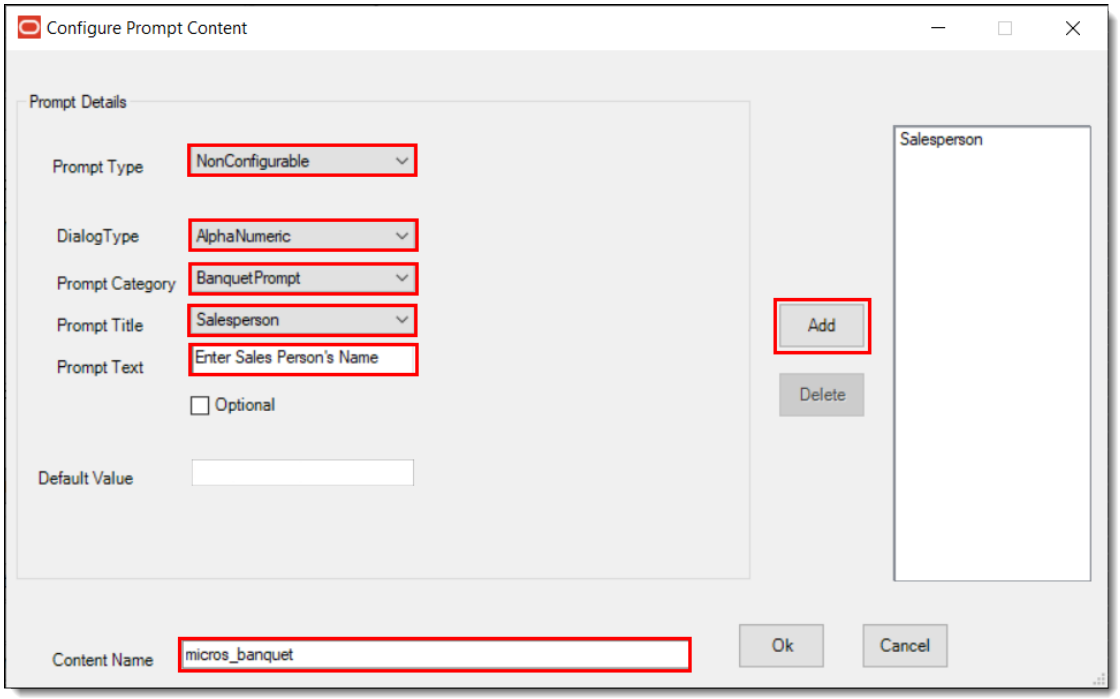
When configuring a Non-Configurable prompt, and a Default Value is entered, the value is printed on the Banquet Check by default, without any prompts being sent to the user. The following example illustrates a **List** Dialog Type to provide a list of items — in this case, a selection of cities.

Figure 43-11 Non-Configurable Type - List Dialog Type



When configuring a Non-Configurable prompt and the user does not enter a Default Value (leaves the setting blank), nothing is printed on the Banquet Check.

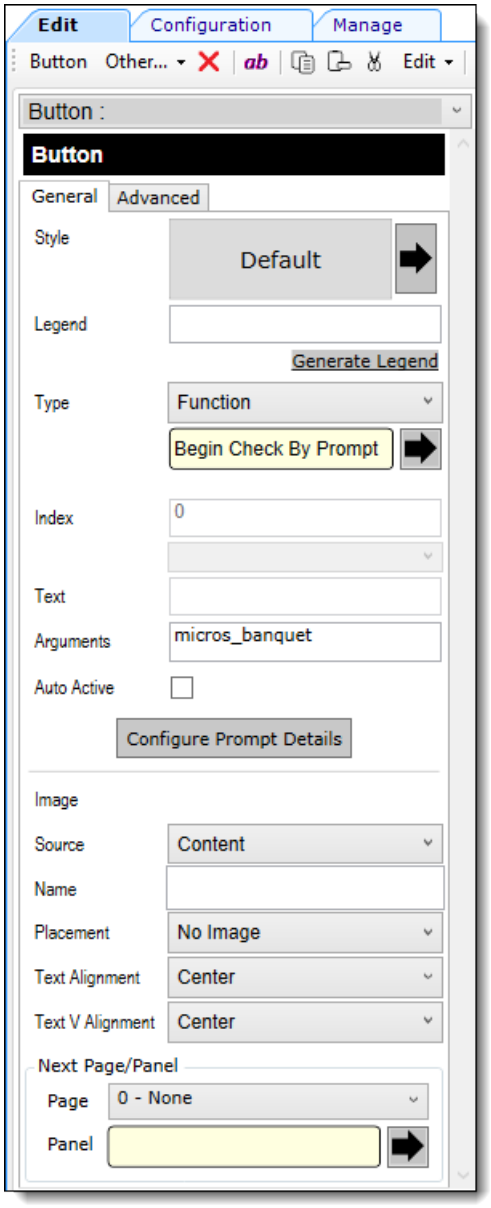
Figure 43-12 Non-Configurable Type - Blank Default Value Setting



Users may configure Non-Configurable prompts when certain data does not change and remains static in a Banquet Check. For example, if the organization holding the banquet is always the same, then it can be defined as a Non-Configurable prompt.

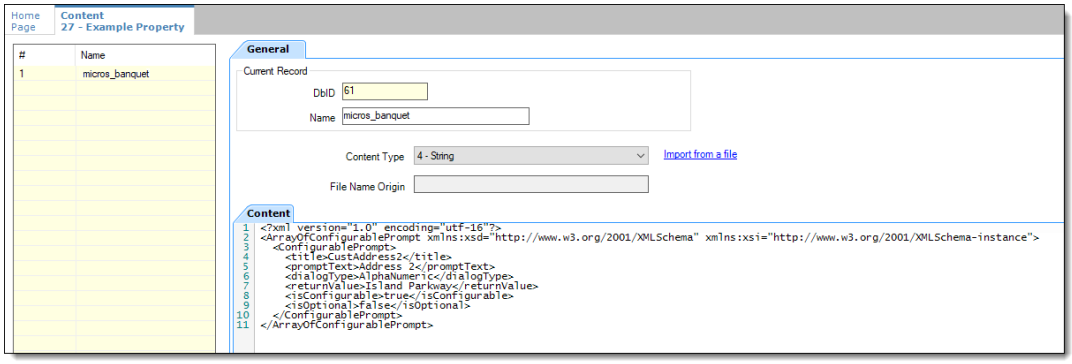
1. The details and content name added or selected is added as Arguments in the button properties panel.

Figure 43-13 Page Design - Button Properties Panel



2. The configuration data for Banquet Check prompts is saved in the Content module as a **String** in the **Content Type** field, and is shown using XML format below.

Figure 43-14 Property Level Content Module

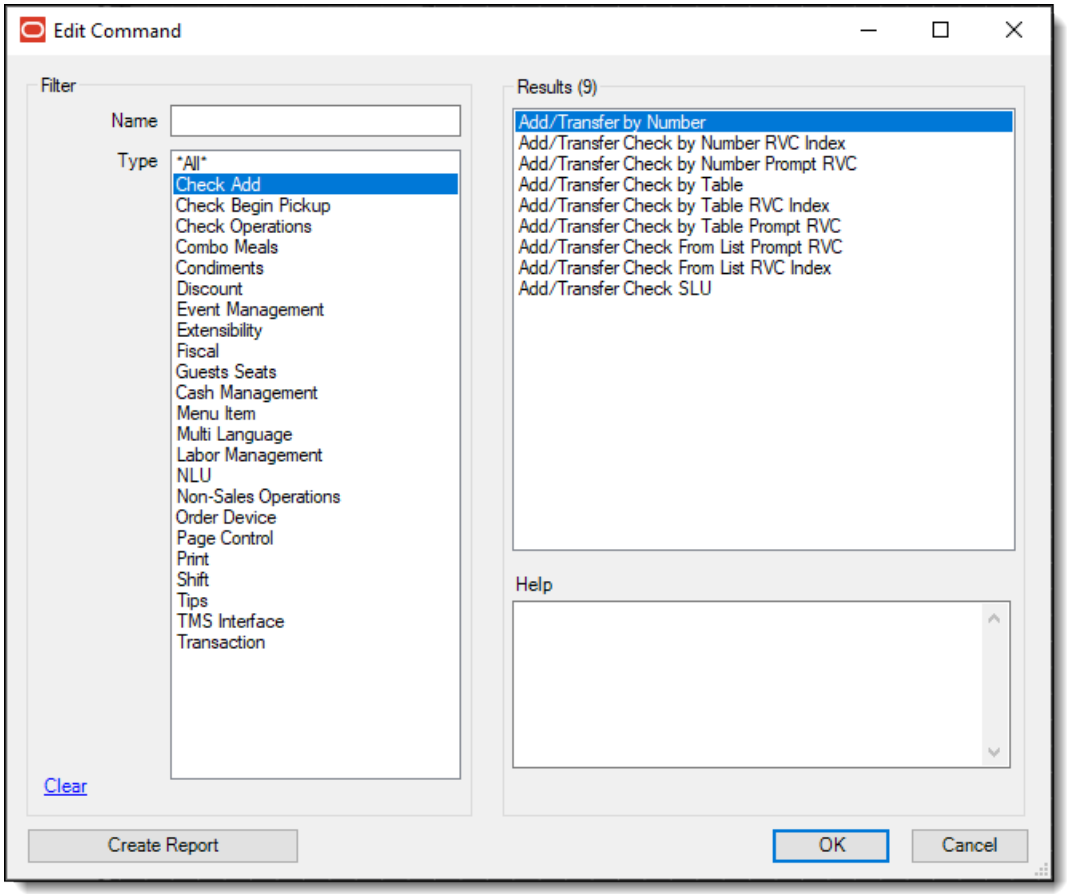


Configuring a Banquet Check Add/Transfer by Number

The following steps illustrate how to transfer one Banquet Check to another.

1. Access the EMC, select a Revenue Center, click the **Configuration** tab, and then click **Page Design**.
2. Choose the touchscreen page to be edited and add a new button.
3. Select **Function** as the **Type**, select **Add/Transfer by Number**, click **OK**, and then **Save**.

Figure 43-15 Page Design – Add/Transfer by Number Function



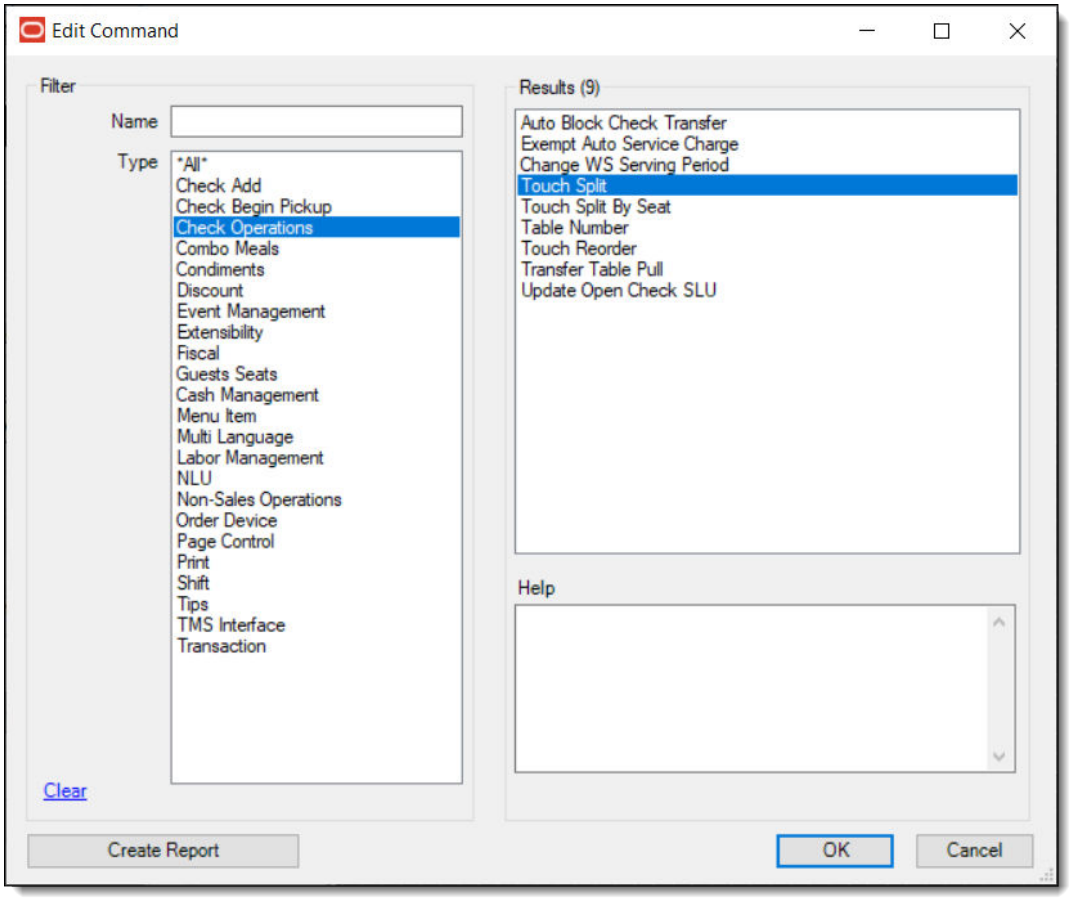
4. Access and sign onto a point-of-sale (POS) workstation.
5. Begin a Banquet Check and ring up menu items. Note the check number and service total.
6. Begin a second Banquet Check and ring menu items. Note the check number and service total.
7. Pickup the first Banquet Check from the workstation Pick Up check list.
8. Press the **Add/Transfer by Number** button.
9. Enter the second Banquet Check number mentioned in step 6. The first check's prompt data overwrites the second check's prompt data when the checks are merged.
10. Press **OK** from the 'Add Check' screen. The second Banquet Check is transferred to the first one.

Configuring a Banquet Split Check

The following steps illustrate how to split a Banquet Check.

1. Access the EMC, select a Revenue Center, click the **Configuration** tab, and then click **Page Design**.
2. Choose the touchscreen page to be edited and add a new button.
3. Select **Function** as the **Type**, select **Touch Split**, click **OK**, and then **Save**.

Figure 43-16 Page Design – Touch Split Function



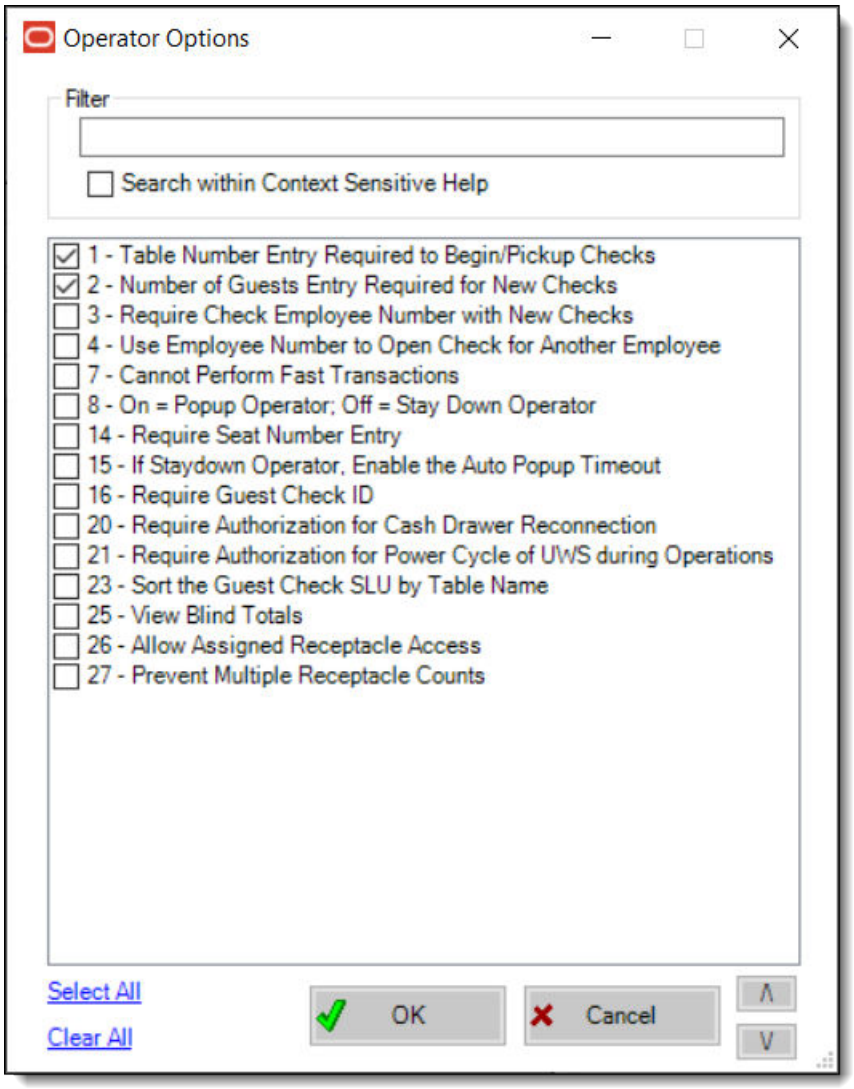
4. Access and sign onto a point-of-sale (POS) workstation.

5. Begin a Banquet Check, ring up some menu items, and then service total.
6. Pickup the first Banquet Check from the workstation Pick Up check list, and then press the **Touch Split** button.
7. Add a check, move some menu items from one check to another, and then press **Save**.
8. Press **Yes** in response to the 'Exit and save changes?' prompt.
9. Press **Yes** in response to the 'Print split checks?' prompt. The Banquet Check is split and the individual checks can be viewed in the open checks list. The first check's prompt data is copied to the second check when the checks are split.

Configuring RVC Table Names as Room Names

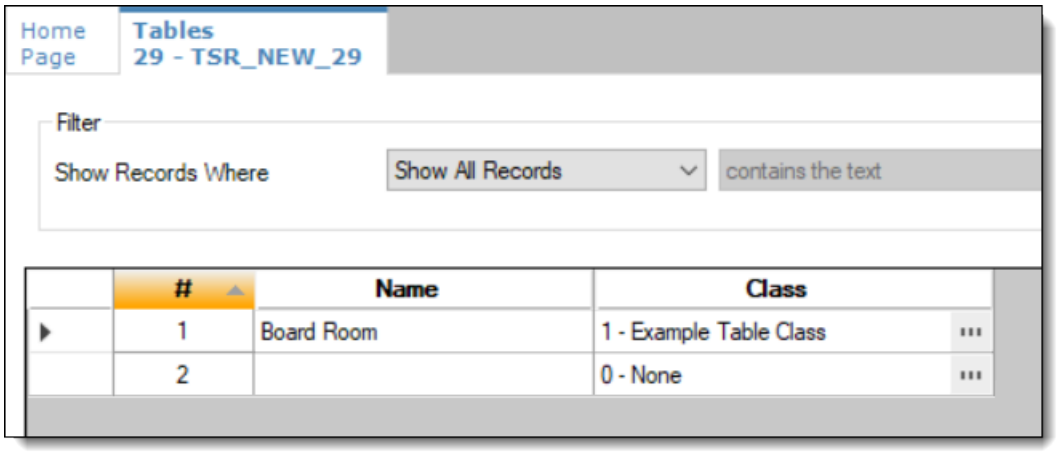
1. Access the EMC, select a Property, click the **Configuration** tab, click **Employee Classes**, and then select the **Operator Options** tab.
2. Enable the **1- Table Number Entry Required to Begin/Pickup Checks** and **2- Number of Guest Entry Required for New Checks** options, click **OK**, and then **Save**.

Figure 43-17 Employee Classes - Operator Options



3. Access the EMC, select a Revenue Center, click the **Setup** tab, and then select the **Tables** module (under the RVC Configuration header).
4. Insert or click an available record, enter a room name, for example, Board Room, assign a Dining Table Class in the **Class** field, and then **Save**.

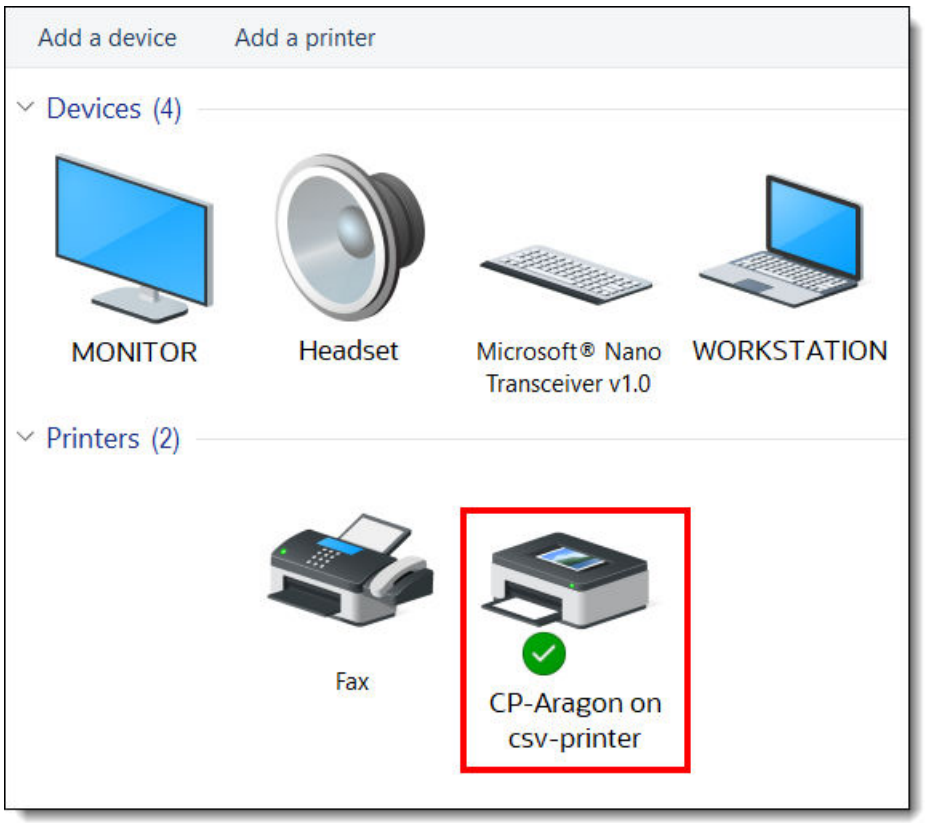
Figure 43-18 Revenue Center Configuration - Tables Module



Configuring a Custom Page Printer

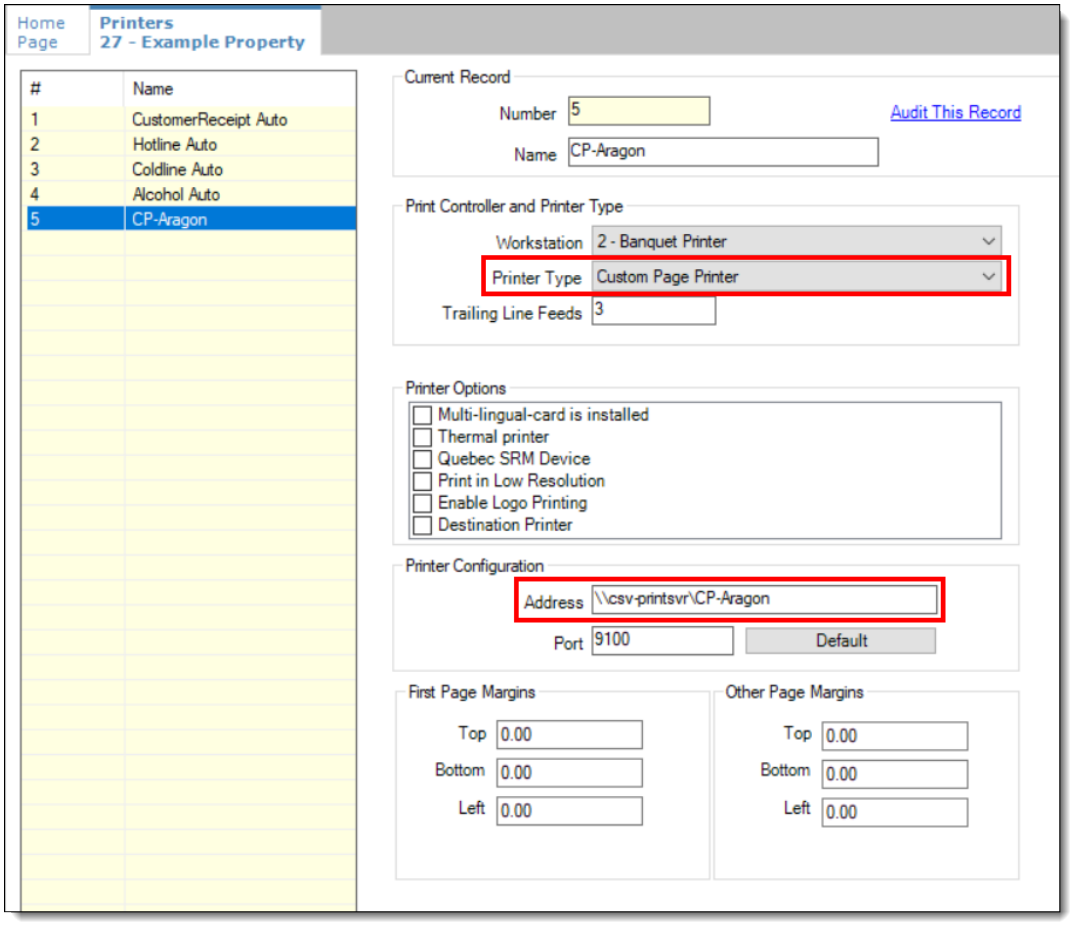
1. A Printer driver must be installed on the workstation.
2. Enter the hostname of the printer.

Figure 43-19 Add a Printer on the Workstation



3. Access the EMC, select a Property, click the **Setup** tab, select the **Printers** module (under the Hardware/Interfaces header).
4. Configure a network banquet printer. For the **Printer Type** field, select **Custom Page Printer** from the drop-down list.

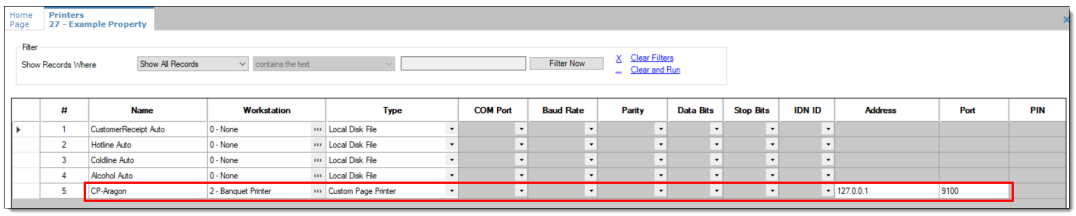
Figure 43-20 EMC Printers Module



5. Enter the network printer name in the **Name** field and **Save**.

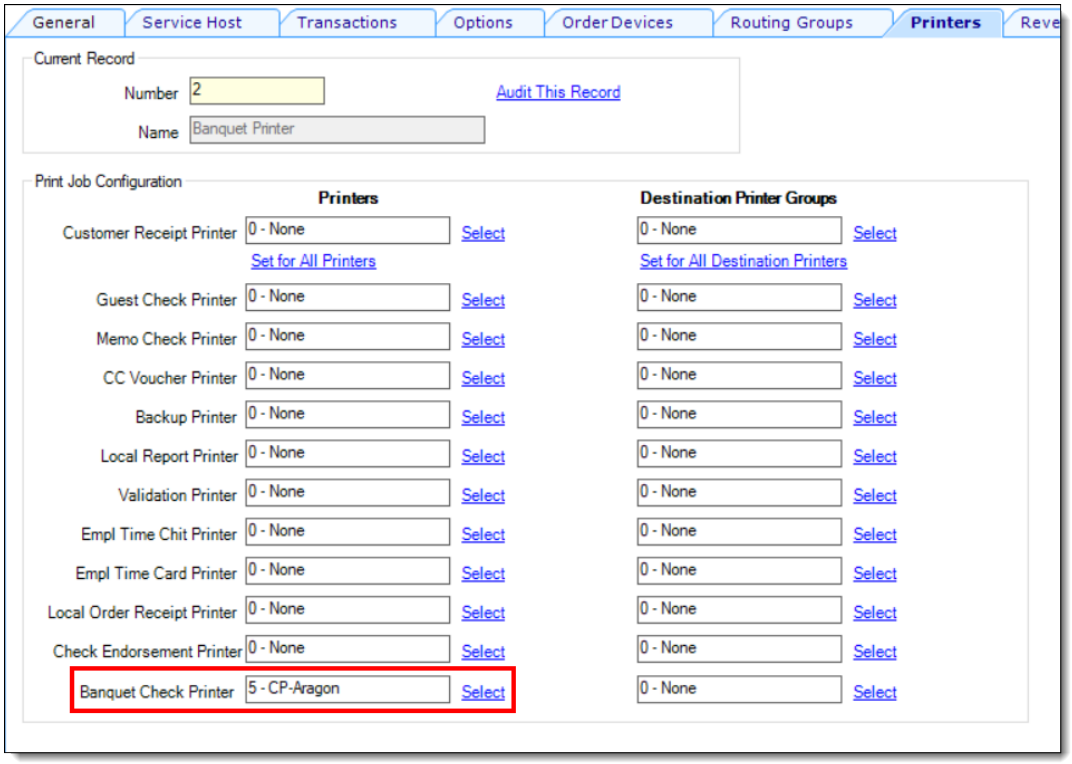
> **Note:**
>
> The **Name** field entry must be the physical printer's name as seen on the network and the Printer Host's IP address in the Printer Configuration section's **Address** field.

Figure 43-21 EMC Printers Module (cont.)



6. Access the EMC, select a Property, click the **Setup** tab, select the **Workstations** module (under the Hardware/Interfaces header).
7. Choose the banquet printing workstation record and click the **Printers** tab.
8. Click **Select**, and from the drop-down list, choose the output printer in the **Banquet Check Printer** field (should be the Custom Page Printer type), click **OK**, and then **Save**.

Figure 43-22 Workstation Module - Assigning the Banquet Check Printer

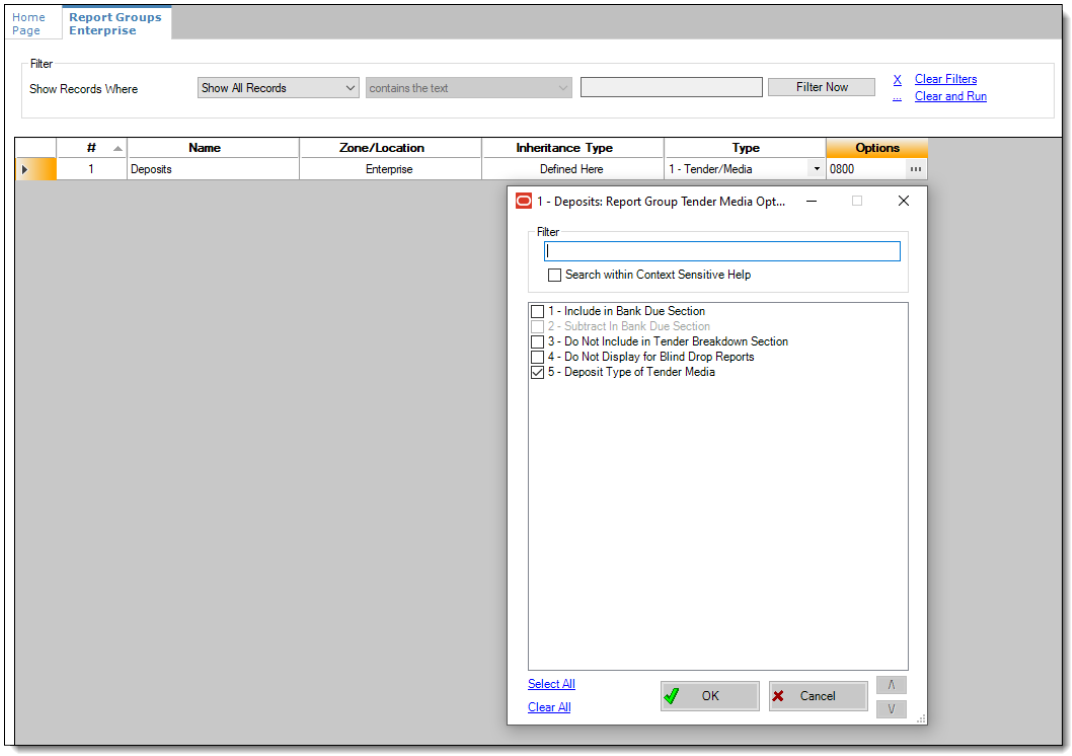


Configuring a Tender Media Deposit

Users can post a Deposit Payment amount on a Banquet Check. If configured, the deposit tender amount prints in a special location on the Banquet Check.

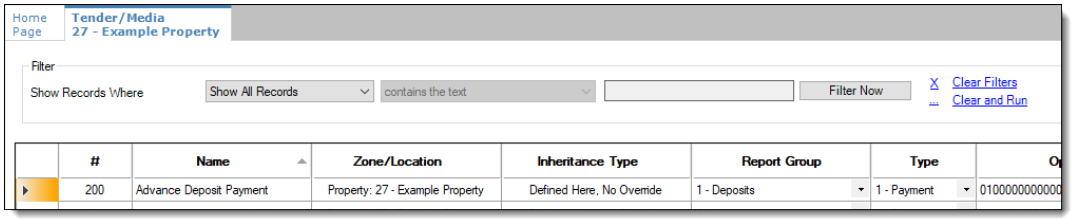
1. Access the EMC, select the Enterprise level, click the **Configuration** tab, select the **Report Groups** module (under the Reporting and Data header).
2. Insert a new record, name it, and then from the **Type** field, select **Tender/Media** from the drop-down list.

Figure 43-23 Report Groups Module



3. A Deposit Payment Tender is linked to a Report Group by enabling the **5 - Deposit Type of Tender Media** option. From the **Options** field, click the ellipsis (**...**) to open the Report Group Tender Media Options screen. Select option 5, click **OK**, and then **Save**.
4. Users can add an advance deposit payment against the Banquet Check by configuring a new payment tender.

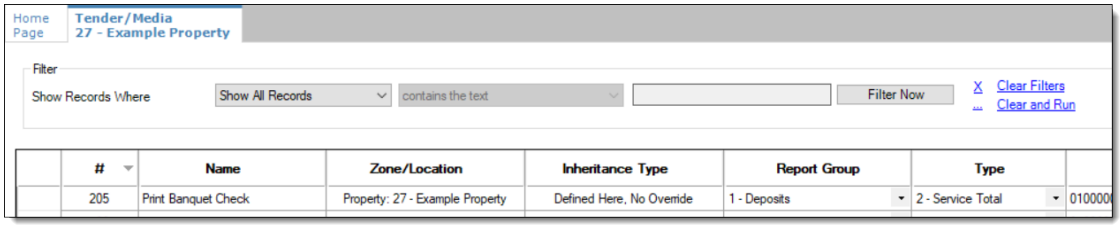
Figure 43-24 Tender/Media - Advance Deposit Payment



Configuring Tender/Media Printing on Banquet Checks

To print a Banquet Check prior to finalizing the transaction, you can create a Tender/Media record configured as a **Service Total** type. You can also use a Payment type to print a Banquet Check when the transaction is tendered or finalized.

Figure 43-25 Tender/Media - Print Banquet Check Service Total

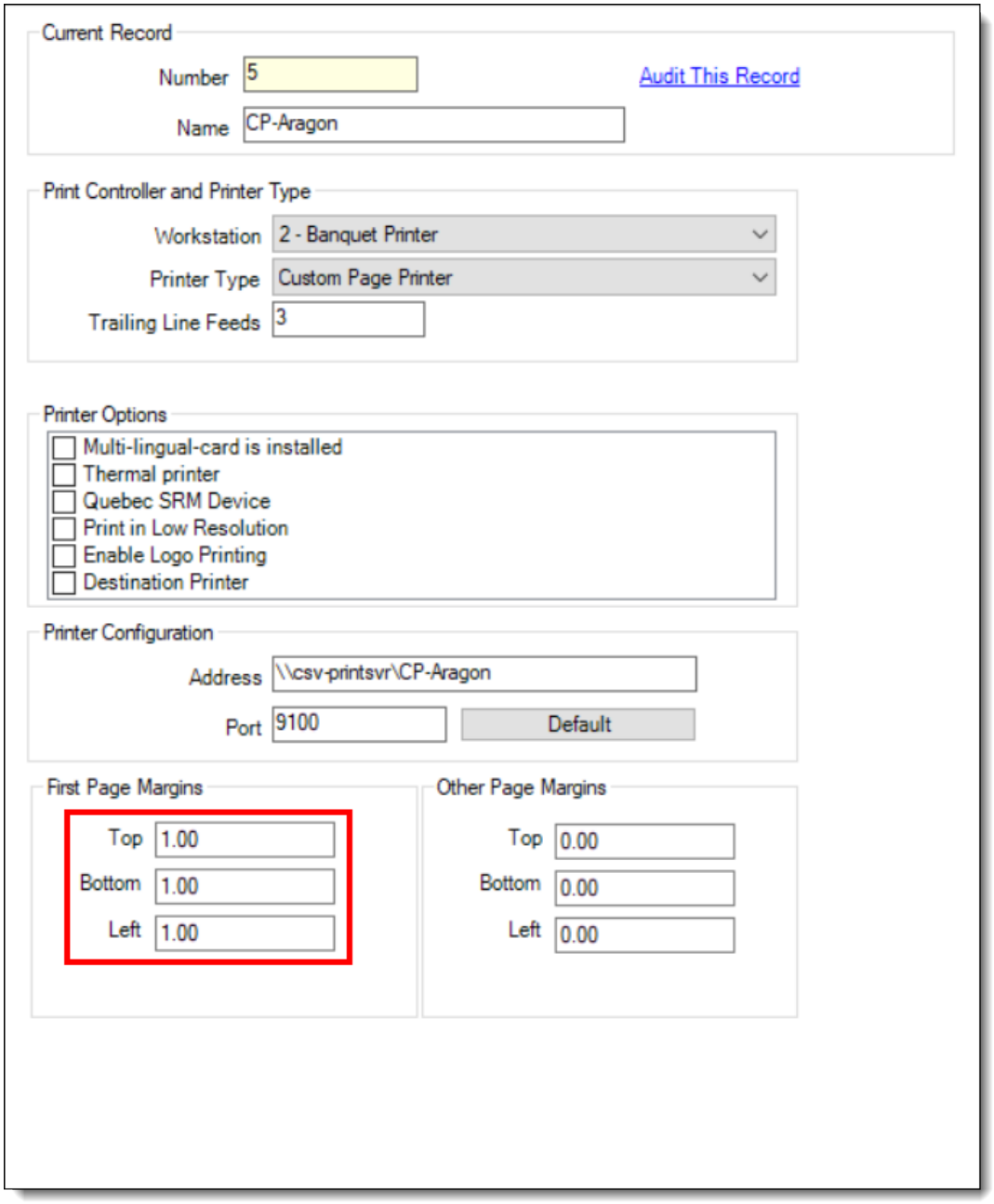


1. Before printing a Banquet Check, access the EMC, select the enterprise or property level, click the **Configuration** tab, select the **Tender/Media** module (under the Sales header).
2. Select the **Printing Options** tab, enable the **90 - Print Banquet Check** option, and then **Save**.

Configuring Page Margins for Banquet Check Printing

1. Access the EMC, select a Property, click the **Setup** tab, select the **Printers** module (under the Hardware/Interfaces header).
2. Select the Banquet Check printer record.
3. Enter the values for the top, bottom, and left margins, and then **Save**.

Figure 43-26 Formatting Banquet Check Page Margins

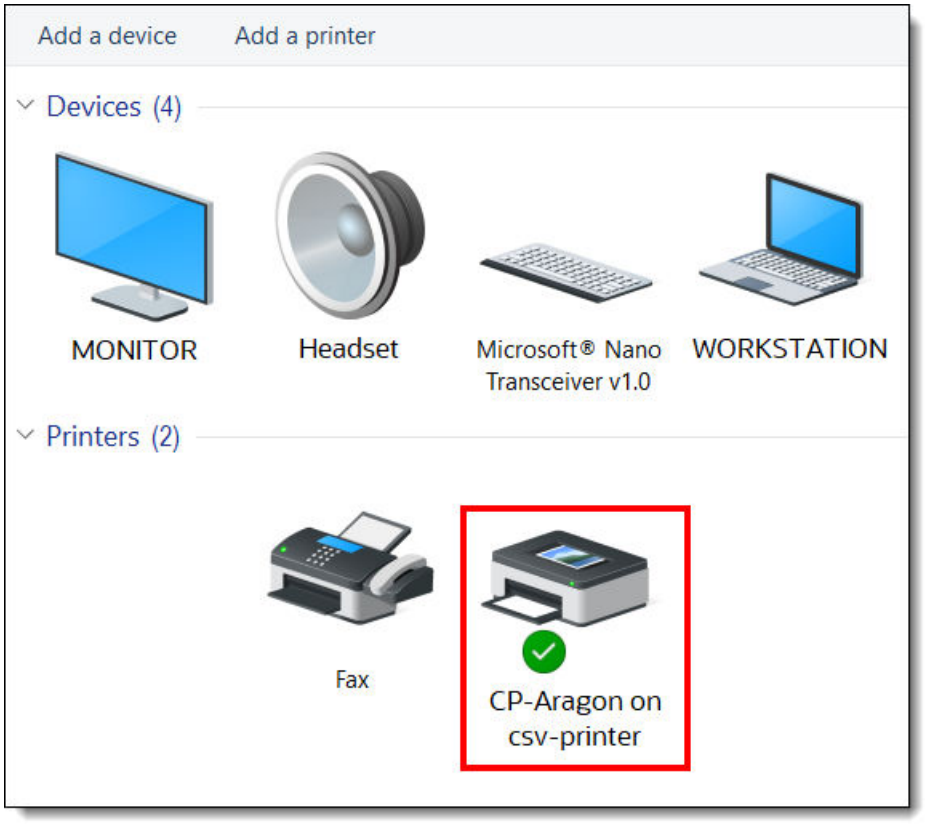


Adding a Banquet Guest Check Printer and Various Print Settings

Configuring a Custom Page Printer

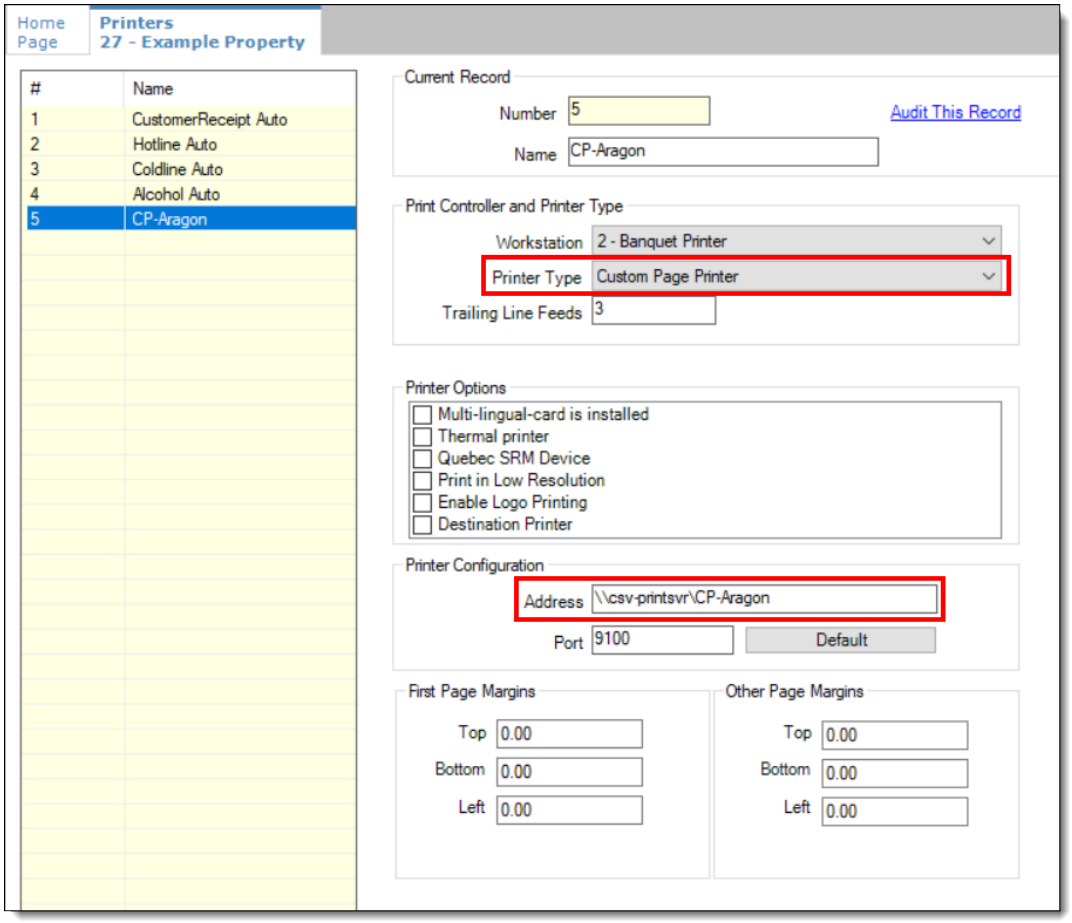
1. A Printer driver must be installed on the workstation.
2. Enter the hostname of the printer.

Figure 43-27 Add a Printer on the Workstation



3. Access the EMC, select a Property, click the **Setup** tab, select the **Printers** module (under the Hardware/Interfaces header).
4. Configure a network banquet printer. For the **Printer Type** field, select **Custom Page Printer** from the drop-down list.

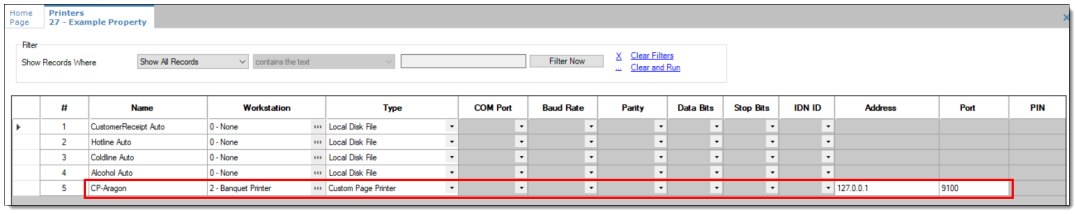
Figure 43-28 EMC Printers Module



5. Enter the network printer name in the **Name** field and **Save**.

> **Note:**
>
> The **Name** field entry must be the physical printer's name as seen on the network and the Printer Host's IP address in the Printer Configuration section's **Address** field.

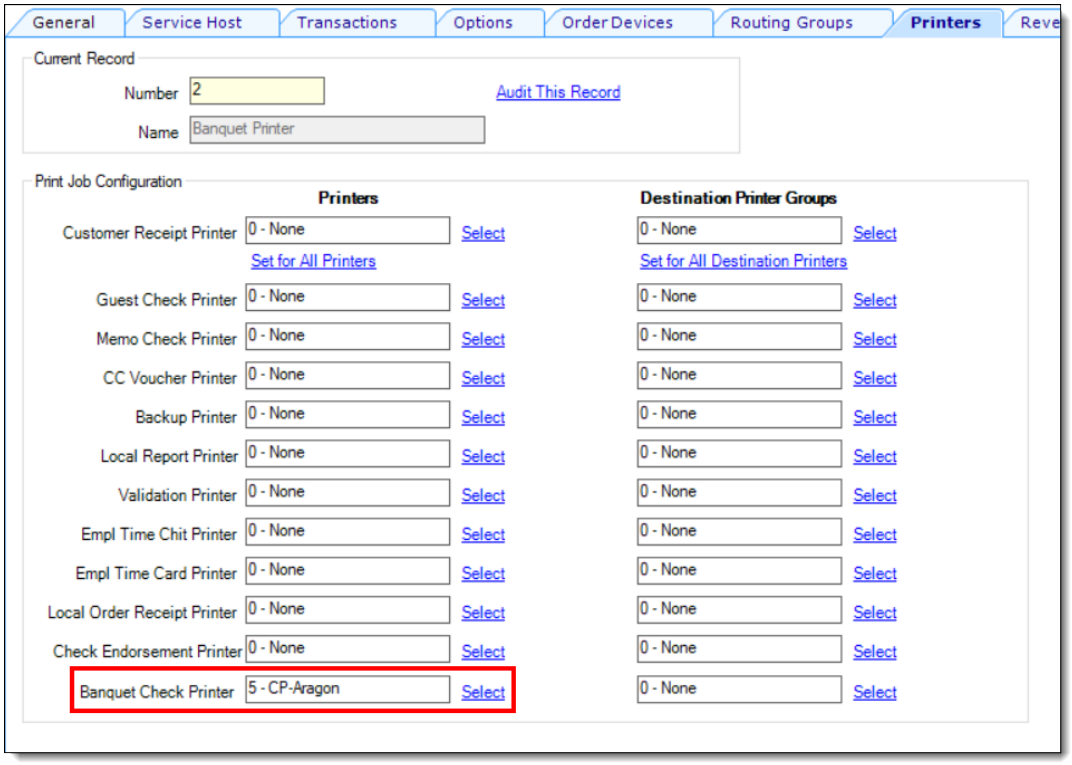
Figure 43-29 EMC Printers Module (continued)



6. Access the EMC, select a Property, click the **Setup** tab, select the **Workstations** module (under the Hardware/Interfaces header).
7. Choose the banquet printing workstation record and click the **Printers** tab.

8. Click **Select**, and from the drop-down list, choose the output printer in the **Banquet Check Printer** field (should be the Custom Page Printer type), click **OK**, and then **Save**.

Figure 43-30 Workstation Module - Assigning the Banquet Check Printer

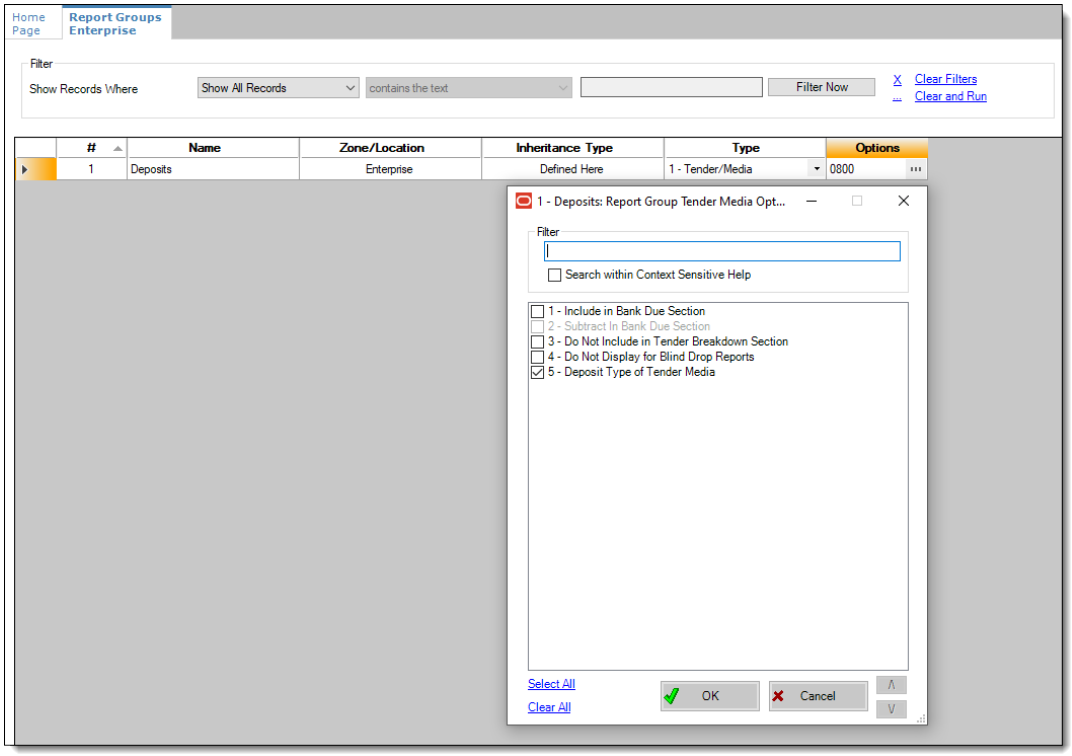


Configuring a Tender Media Deposit

Users can post a Deposit Payment amount on a Banquet Check. If configured, the deposit tender amount prints in a special location on the Banquet Check.

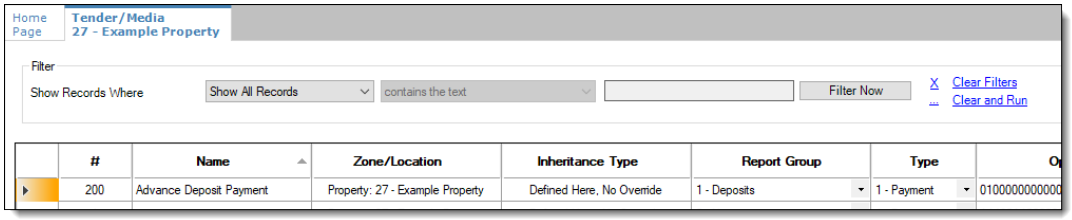
1. Access the EMC, select the Enterprise level, click the **Configuration** tab, select the **Report Groups** module (under the Reporting and Data header).
2. Insert a new record, name it, and then from the **Type** field, select **Tender/Media** from the drop-down list.

Figure 43-31 Report Groups Module



3. A Deposit Payment Tender is linked to a Report Group by enabling the **5 - Deposit Type of Tender Media** option. From the **Options** field, click the ellipsis (**...**) to open the Report Group Tender Media Options screen. Select option 5, click **OK**, and then **Save**.
4. Users can add an advance deposit payment against the Banquet Check by configuring a new payment tender.

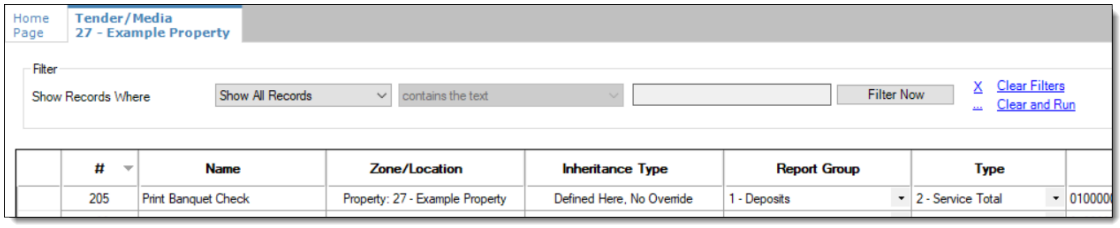
Figure 43-32 Tender/Media - Advance Deposit Payment



Configuring Tender/Media Printing on Banquet Checks

To print a Banquet Check prior to finalizing the transaction, you can create a Tender/Media record configured as a **Service Total** type. You can also use a Payment type to print a Banquet Check when the transaction is tendered or finalized.

Figure 43-33 Tender/Media - Print Banquet Check Service Total

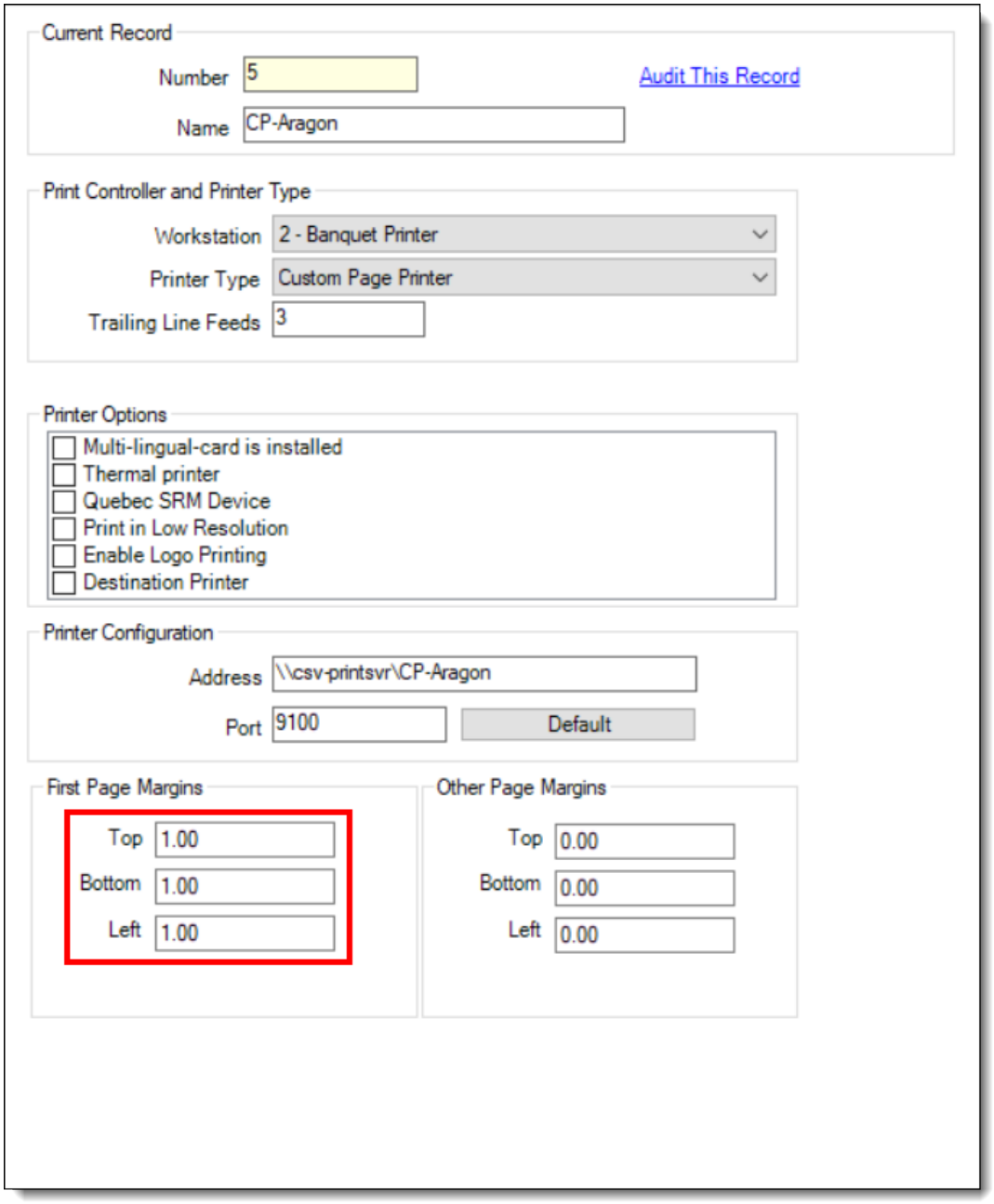


1. Before printing a Banquet Check, access the EMC, select the enterprise or property level, click the **Configuration** tab, select the **Tender/Media** module (under the Sales header).
2. Select the **Printing Options** tab, enable the **90 - Print Banquet Check** option, and then **Save**.

Configuring Page Margins for Banquet Check Printing

1. Access the EMC, select a Property, click the **Setup** tab, select the **Printers** module (under the Hardware/Interfaces header).
2. Select the Banquet Check printer record.
3. Enter the values for the top, bottom, and left margins, and then **Save**.

Figure 43-34 Formatting Banquet Check Page Margins



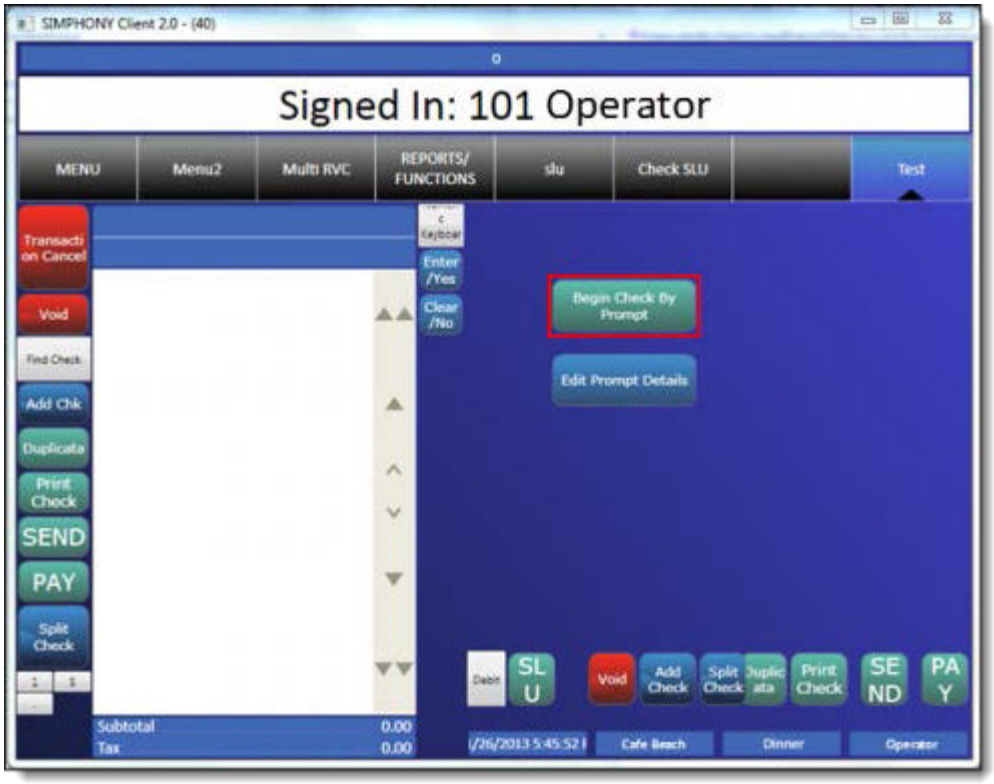
Creating and Printing Banquet Guest Checks From a POS Workstation

Beginning a Banquet Check

Once EMC configuration is complete, you can now begin to generate banquet guest checks from a point-of-sales (POS) workstation.

1. After configuring a Begin Check By Prompt button in the EMC's Page Design module, access a workstation and press the **Begin Check By Prompt** button.

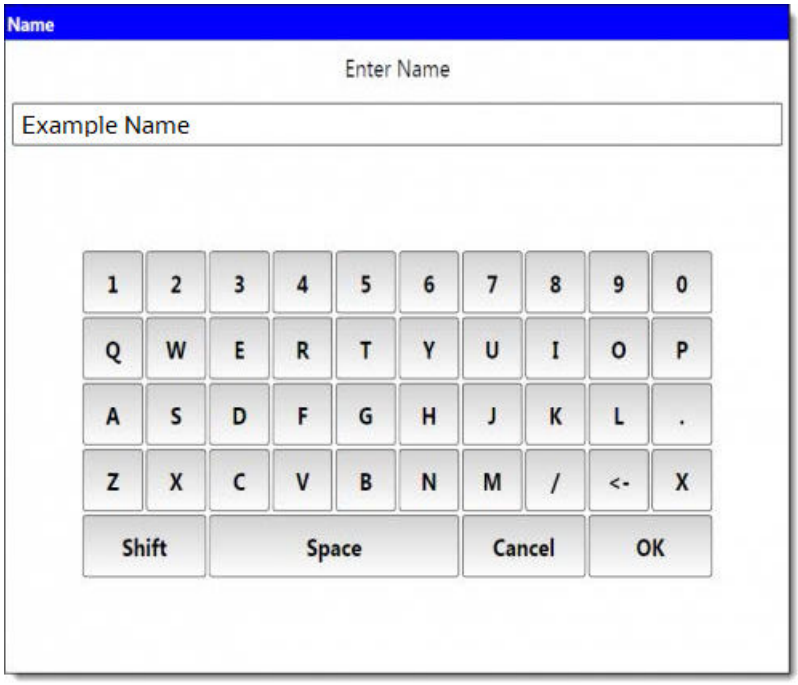
Figure 43-35 Begin Check By Prompt



> **Note:**
>
> If a user cancels any one of the sequential Banquet Check prompts, the entire check/transaction is cancelled.

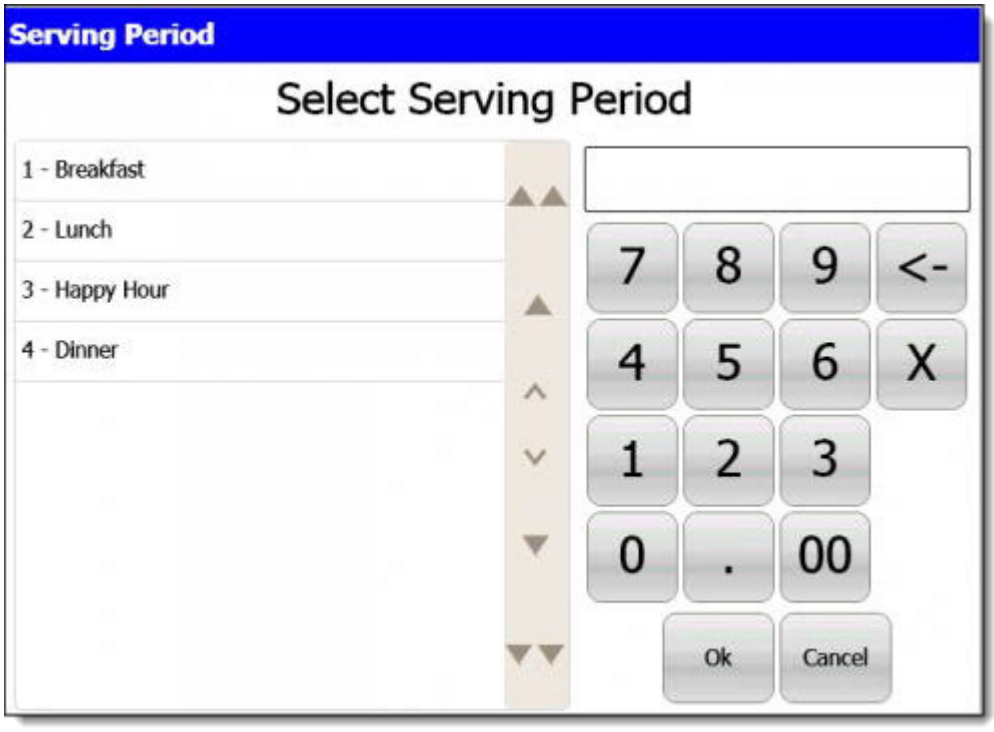
2. Add the Banquet Check's header detail through prompts.

Figure 43-36 Banquet Check - Enter Name Window



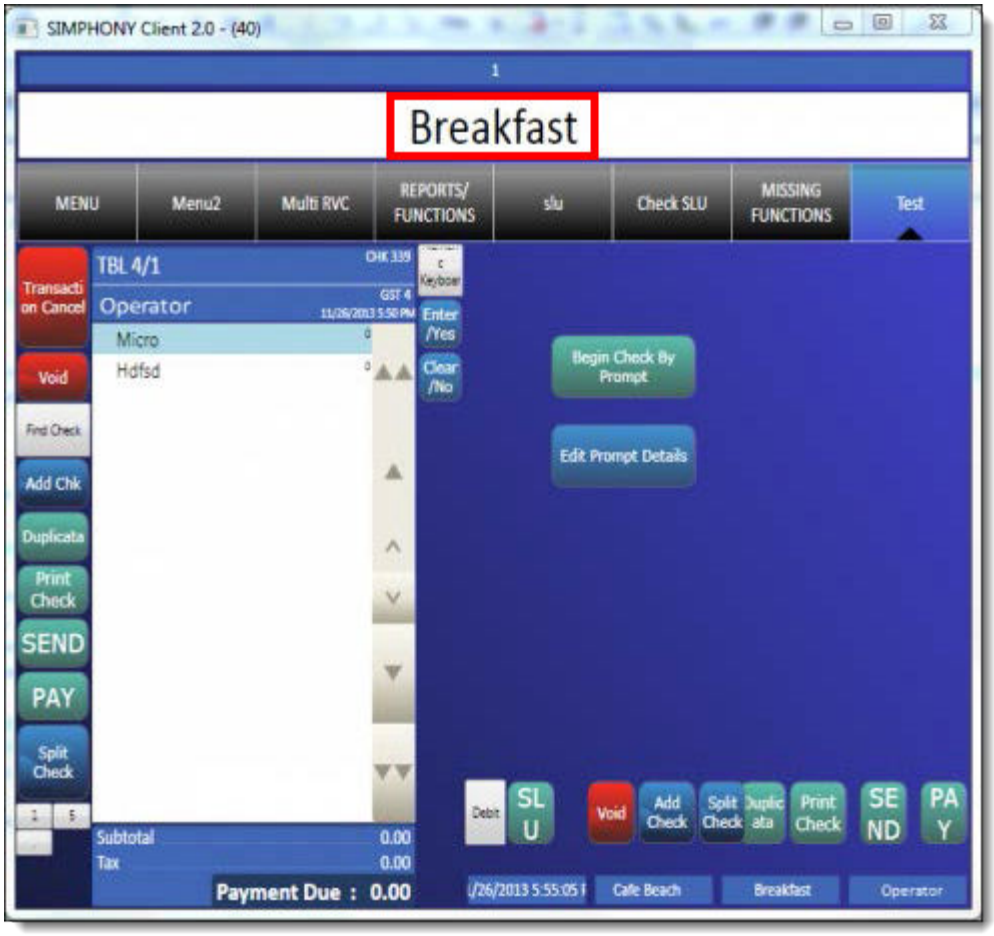
3. Select the **Room** name. This step uses the EMC Tables module data to show a list of room names.
4. Select the **Serving Period**.

Figure 43-37 Banquet Check - Select Serving Period



5. The workstation's Check Detail area displays the selected serving period.

Figure 43-38 Banquet Check - Shows Selected Serving Period



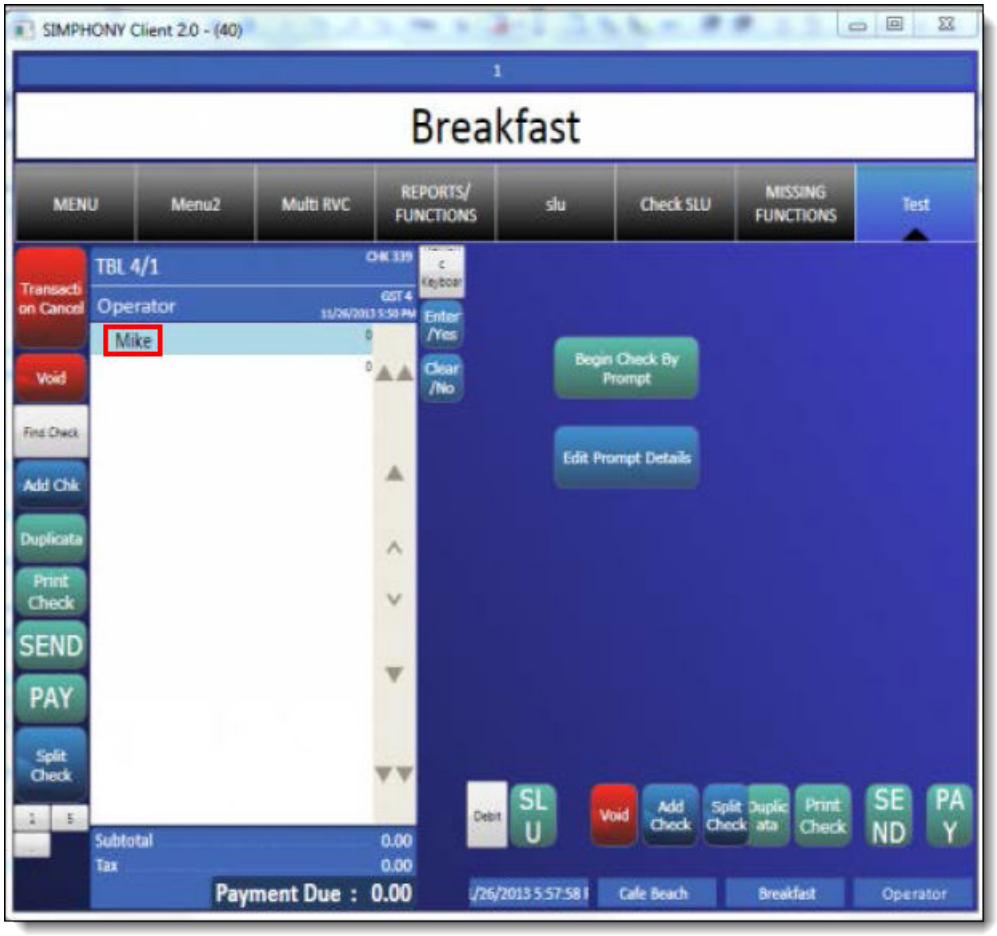
6. Select the header content in the Name field to edit. Press **OK** when finished.

Figure 43-39 Banquet Check - Edit the Header Content



7. The Check Detail area displays the newly entered header text.

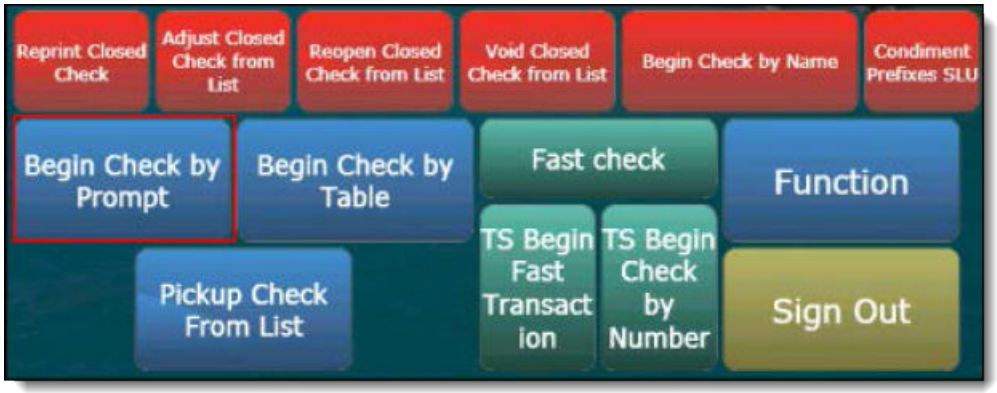
Figure 43-40 Banquet Check - Edited Header Content



Utilizing Banquet Checks With Serving Periods

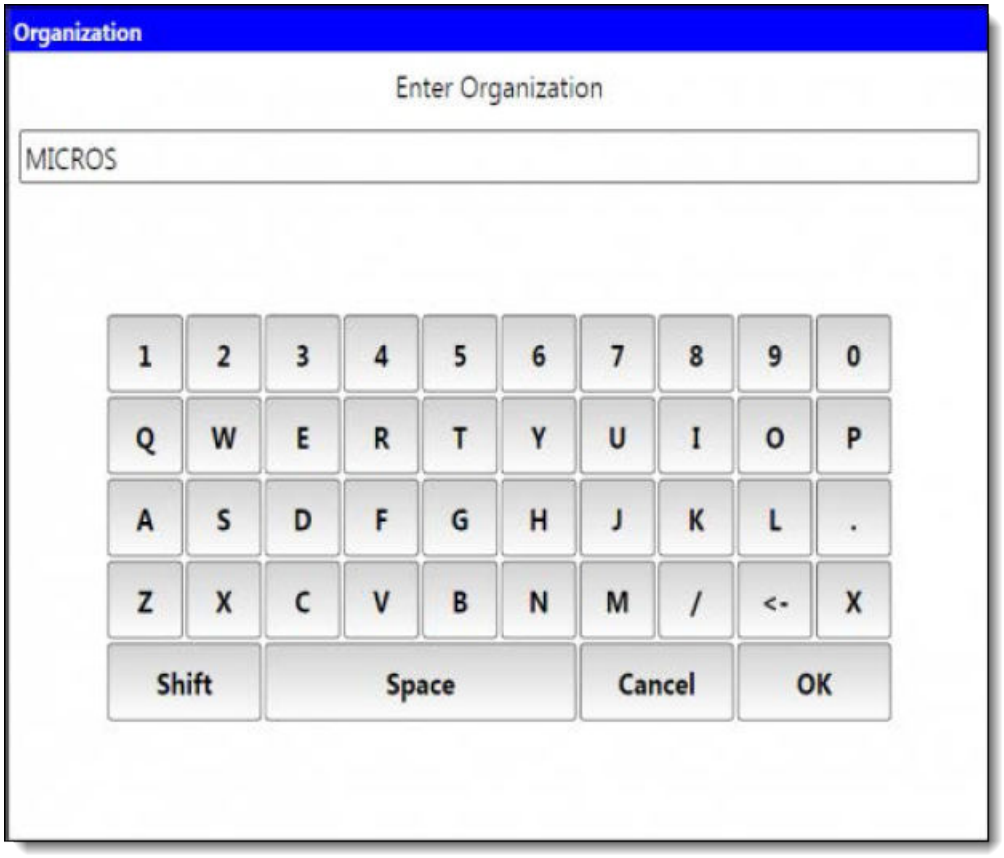
1. Log onto a POS workstation and press the **Begin Check By Prompt** button.

Figure 43-41 Banquet Check - Begin Check By Prompt



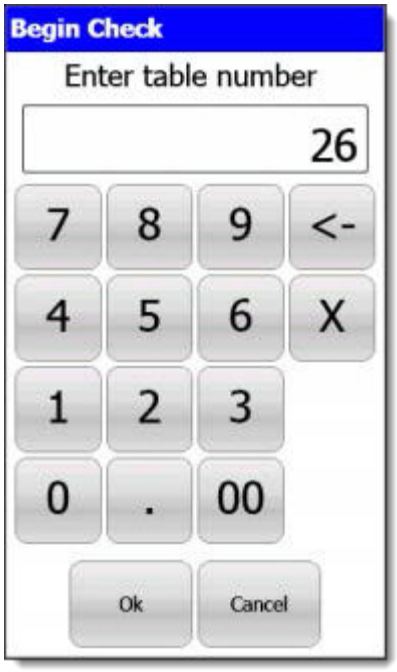
2. Enter the header prompt details and press **OK** to continue.

Figure 43-42 Banquet Check - Editing Header Prompt Details



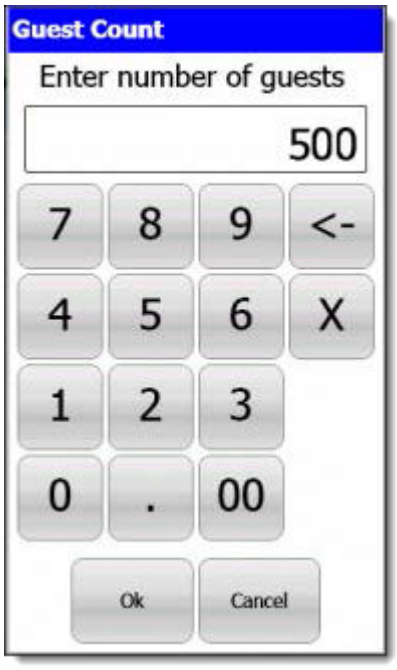
3. Enter a table number and press **Ok**.

Figure 43-43 Begin Check - Enter Table Number



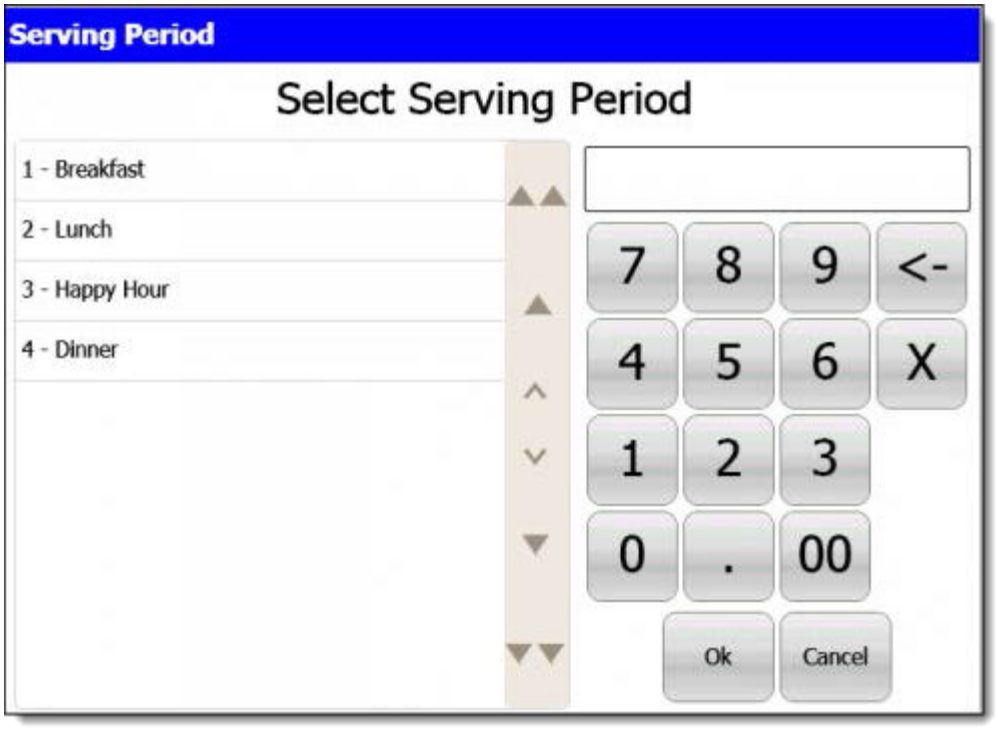
4. Enter the number of guests and press **Ok**.

Figure 43-44 Begin Check - Enter Guest Count



5. Select a serving period and press **Ok**.

Figure 43-45 Banquet Check - Select Serving Period

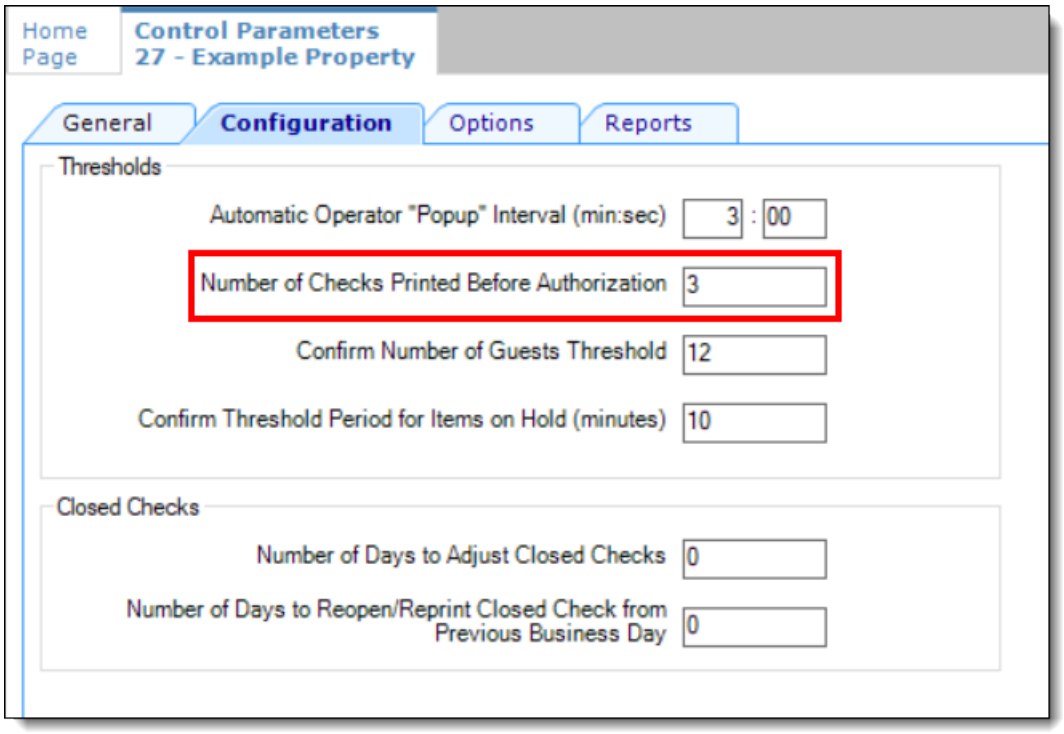


Configuring Check Printing Privileges

Printing of all checks, including Banquet Checks, requires privileges to be assigned to employees Roles. Other EMC options also need to be enabled. To assign guest check printing privileges:

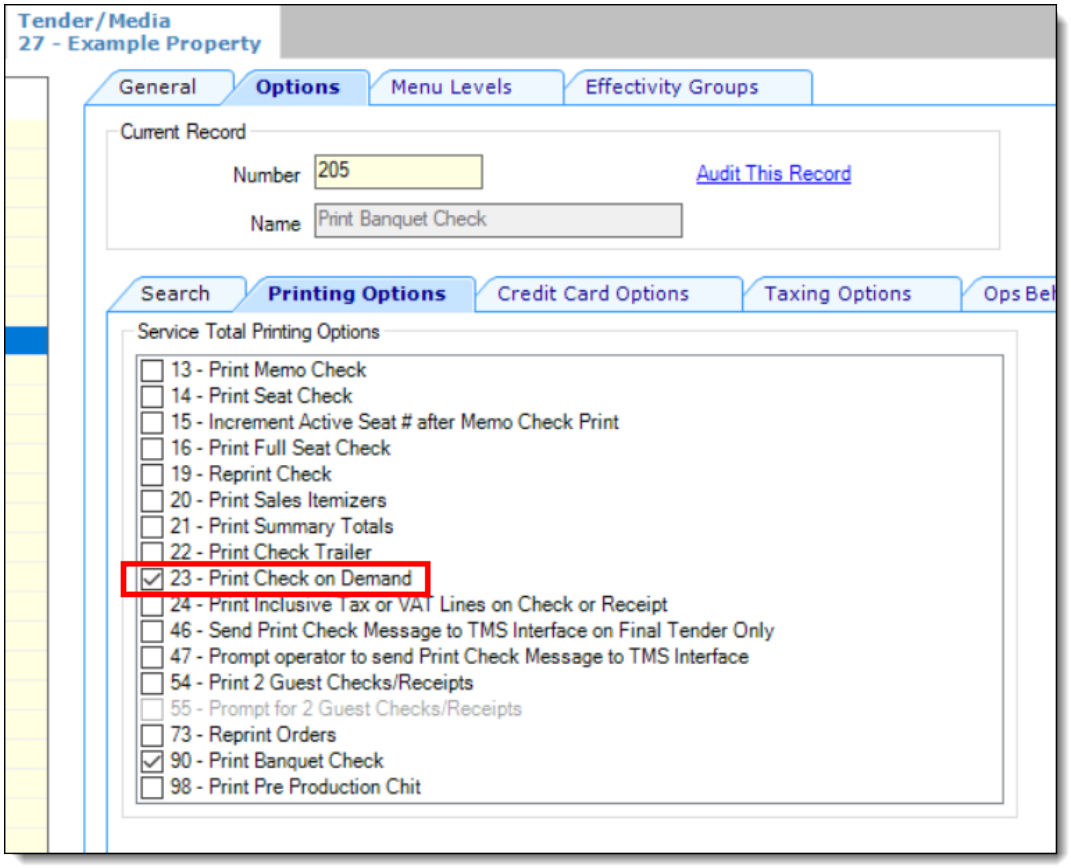
1. Access the EMC and the select the Enterprise level, click the **Configuration** tab, and then select **Roles**. Select the Role to be edited and toggle to Form view.
2. Click the **Operations** tab, click the **Printing** tab and enable the **23 - Authorize/Perform Unlimited Reprinting/Printing of a Check** option.
3. To control how many checks may be printed by employees before requiring authorization, access the EMC and select the Property or Revenue Center level. Click the **Setup** tab, and then click the **Control Parameters** module (under the Parameters heading). Click the **Configuration** tab and from the **Number of Checks Printed Before Authorization** field, enter a digit (from 0–99) to allow staff to print Banquet Checks until the threshold limit is exceeded.

Figure 43-46 EMC Control Parameters - Number of Checks to Print Before Authorization Setting



4. Access the EMC, select a Property, click the **Configuration** tab, and then click **Tender/ Media** (under the Sales header).
5. Click the **Options** tab, click the **Printing Options** tab, and then enable the **23 - Print Check on Demand** option and **Save**.

Figure 43-47 EMC Tender/Media Printing Options



6. Finally, each employee allowed to immediately print guest checks, needs to have another privilege assigned to them. This setting can be accessed from the EMC by selecting a Property, click the **Configuration** tab, click the **Employee Classes** module, and then click the **Operator Options** tab. From the **Operator Type** field, select **1 - On Demand** from the drop-down list and **Save**.

44

Configuring Pre-Production Chits to Output to Remote Printers

Kitchen or bar staff can preview orders and begin preparing items that require more prep or cooking time to assist in delivering orders more quickly. Pre-production printing allows servers to send certain menu items to remote printers prior to finalizing the current round. Pre-production printing is also compatible with the Hold and Fire feature, where an order or individual items can be held before users fire them to the bar or kitchen. To enable the **Hold and Fire** functionality, see Setting the Hold and Fire Option.

For easier recognition, pre-production chits are formatted differently than conventional order output to remote printers. The text *** TO BE PREPARED *** prints by default on each chit (with the Order Type showing directly beneath it), prior to the Dining Course name (if enabled), and then the quantity ordered is printed adjacent to each ordered menu item.

When the RVC Parameters option **70 - Enable Hold and Fire** is enabled, and a check (or menu item) is held, once the check is picked up, the text *** CLAIMED *** prints on the chit. If the Hold and Fire option is not enabled, the *** CLAIMED *** banner does not print on pre-production chits.

Operationally, as workstation operators add menu items, they can select a Pre-Production Chit (Tender/Media Service Total) button to send the pre-production items to remote printers.

After an item is fired through pre-production chit printing, if the workstation operator adds a second item and then selects pre-production chit printing again, the system only fires the second item. The first item does not trigger the re-fire of a pre-production chit.

See Example of a Pre-Production Chit to view examples of printed pre-production chits.

Configuring Print Classes for Pre-Production Chits

To configure and assign printers to a pre-production Print Class:

1. Select the Enterprise or property, click **Configuration**, and then click **Print Classes**.
2. Insert a new record and enter the name of the pre-production print class in the **Name** field (for example, Print Pre-Production Chit).
3. Configure settings within the **Options** section as needed.
4. Select the **Routing Group** from the drop-down list in the **Output** section.

   Typically, enabling the **0 - Use Order Devices** routing group suffices for most pre-production chit printing tasks.
5. Enable the order devices that are to serve as a pre-production remote printers.
6. Click **Save**.

Configuring Tender/Media - Service Total Records for Pre-Production Chits

To configure Tender/Media - Service Total records for pre-production chit printing:

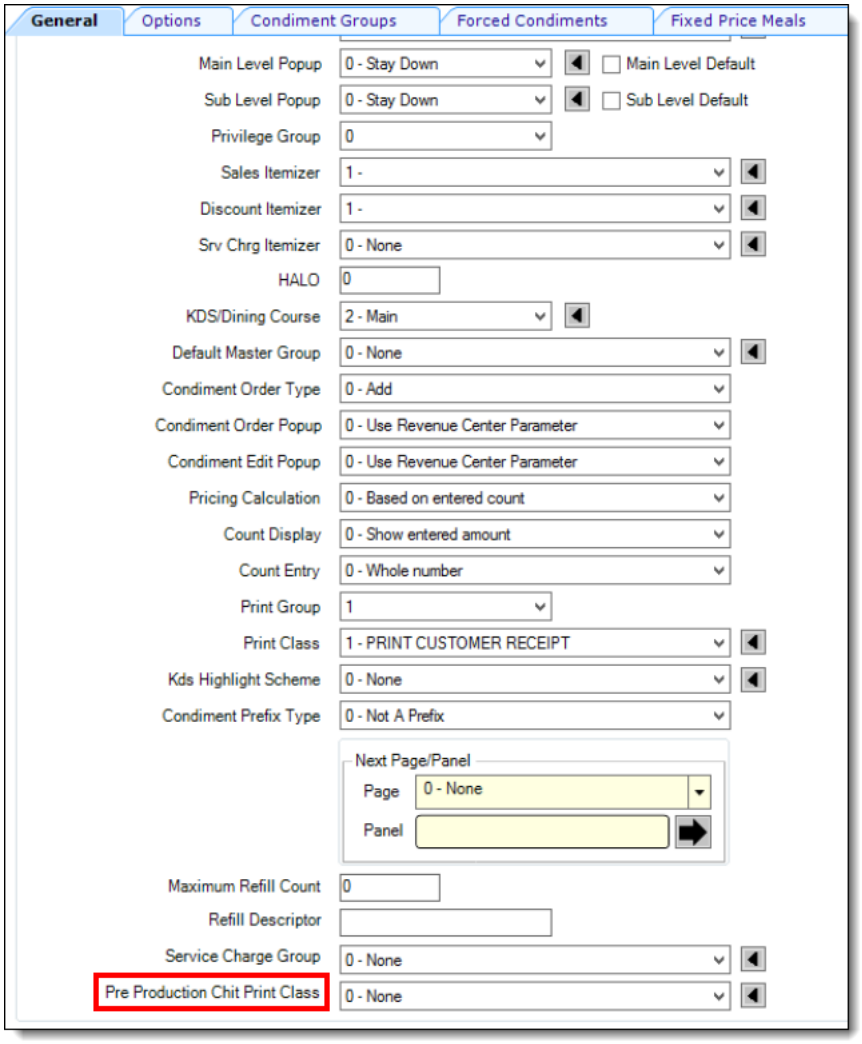
1. Select the Enterprise or property, click **Configuration**, and then click **Tender Media**.
2. Insert a new record, and enter the name of the pre-production service total record (for example, Print Pre-Production Chit).
3. In the **General Settings** section, assign a **Privilege Group** that allows users to use this service total.
4. In the **Key Type** field, select **2 - Service Total** from the drop-down list.
5. Configure the remainder of the **General** tab settings, and then click the **Options** tab.
6. Click the **Printing Options** tab, and then enable the **98 - Print Pre-Production Chit** option.
7. Click the **Ops Behavior** tab, and then select **2 - Hold Order** as the **Tender Media Hold Type** from the drop-down list.
8. Configure the remainder of this service total record's settings.
9. Click **Save**.

Configuring Menu Item Classes for Pre-Production Chits

You need to determine which menu items to apply pre-production chit printing, navigate to each of these items' assigned Menu Item Class, and assign the pre-production chit print class. To configure Menu Item Classes to generate pre-production chits:

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.
2. On the **General** tab, select the pre-production print class from the **Pre-Production Chit Print Class** drop-down list.

Figure 44-1 Menu Item Classes - Pre-Production Chit Print Class Setting



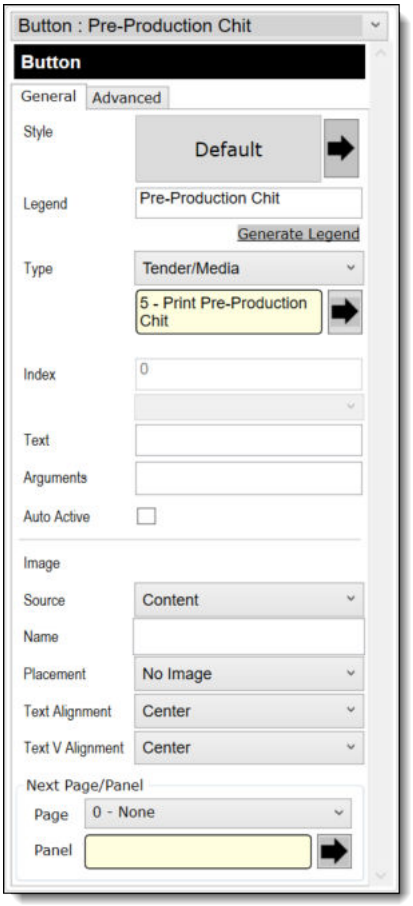
3. Click **Save**.

Configuring a Page Design Button for Pre-Production Chits

To configure a workstation button to generate pre-production chit printing:

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. On the order entry pages of your choice, add a new button and configure the following fields:
   a. **Legend**: Enter the button name.
   b. **Type**: Select **Tender/Media**, and then select the Print Pre-Production Chit, Tender/Media - Service Total record.

Figure 44-2 Page Design - Workstation Button for Pre-Production Chit Printing



3. Configure the remainder of the button's settings.
4. Click **Save**.

Example of a Pre-Production Chit

Pre-Production chits are formatted differently than conventional order output to remote printers. The text *** TO BE PREPARED *** prints by default on each chit (with the Order Type showing directly beneath it), prior to the Dining Course name (if enabled), and then the quantity ordered is printed adjacent to each ordered menu item.

When the RVC Parameters option **70 - Enable Hold and Fire** is enabled, and a check is held, once the check is picked up, the text *** CLAIMED *** prints on the chit.

See Setting the Hold and Fire Option for more information about enabling this functionality.

If enabled, the Dining Course Name prints and also adheres to the Print Classes settings, whereby if the **4 - On = Red, Off = Black** option is enabled, the Dining Course name prints in red, and prints in black if disabled.

Here is an example of a Pre-Production Chit:

Figure 44-3 Example of a 'TO BE PREPARED' Pre-Production Chit

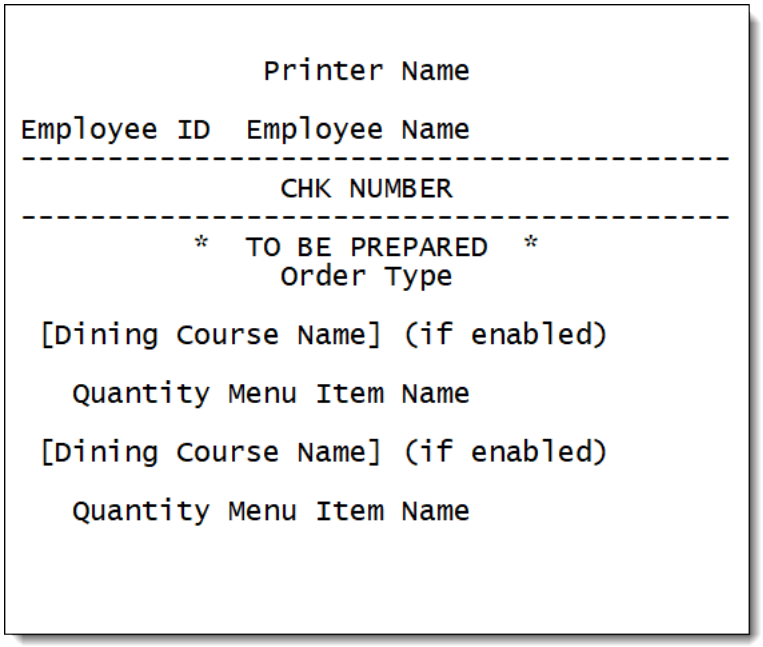
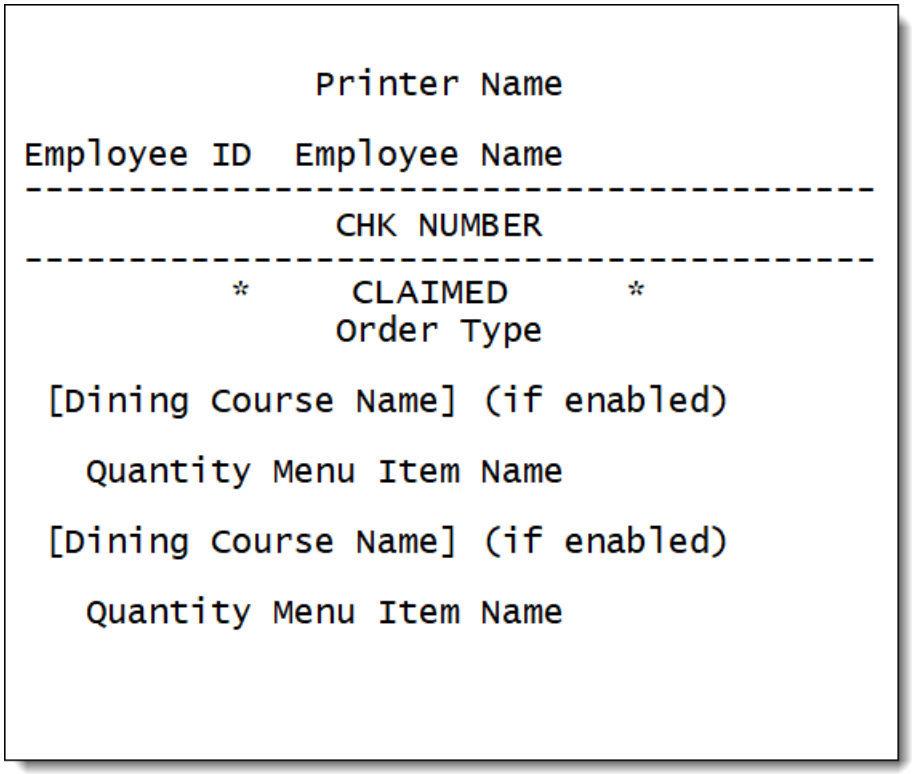


Figure 44-4 Example of a 'CLAIMED' Pre-Production Chit



45

Peripheral Devices

Peripheral devices connect with and relay information to or from Simphony. For example, common POS peripheral devices include magnetic card readers, cash drawers, coin dispensers, printers, pole displays, and scales.

Cash Drawer Assignment and Unassignment

You can assign a cash drawer in the following ways:

- By workstation
- By workstation operator

Giving multiple employees access to a single cash drawer is less secure than requiring employees to be assigned to a cash drawer.

When you set the option **Assign Cash Drawer By User Workstation** from the Workstations module, workstation operators can assign themselves to a cash drawer using the one of the following function keys:

- 848 - Assign Cash Drawer
- 839 - Assign Cash Drawer 1
- 840 - Assign Cash Drawer 2

The following table compares these function keys:

Table 45-1 Assign Cash Drawer Function Key Comparison

848 - Assign Cash Drawer	839 - Assign Cash Drawer 1 and 840 - Assign Cash Drawer 2
Assigns the drawer to the workstation operator who is signed in.	Assigns the drawer to the workstation operator who is signed in.
If two drawers are used with the workstation, Simphony assigns drawer 1 if both are unassigned. If drawer 1 is assigned, Simphony assigns drawer 2, and vice-versa.	If two drawers are used with the workstation, these keys allow the workstation operator to select the drawer he or she wants to assign. (To offer a choice, you must configure both keys on the touchscreen.)
Using this key opens the cash drawer.	Using this key does not open the cash drawer.
If the cash drawer is unassigned, using this key prompts the workstation operator to assign the cash drawer number.	If the cash drawer is unassigned, using this key prompts the workstation operator to assign the cash drawer number, while the top of the screen shows INACTIVE (no one is assigned).
If a workstation operator attempts to assign the drawer when another workstation operator is already assigned, the following error message appears: All Cash Drawers Currently Assigned.	If the workstation operator attempts to assign the drawer when another workstation operator is already assigned, no error message appears. The top of the screen show NAME (of the person assigned to the drawer). Thus, one person may assign the drawer and override the workstation operator who is already assigned.

Table 45-1 (Cont.) Assign Cash Drawer Function Key Comparison

848 - Assign Cash Drawer	839 - Assign Cash Drawer 1 and 840 - Assign Cash Drawer 2
All workstation operators can use this function key.	All workstation operators cannot use this function key.
At the end of a shift, the workstation operator or a privileged manager needs to unassign the drawer to allow another workstation operator to use the drawer.	At the end of a shift, it is not necessary to unassign the drawer because another workstation operator may override the assigned workstation operator.

The **849 - Unassign Cash Drawer** function key unassigns the drawer from the workstation operator, regardless of whether the workstation operator assigned the drawer using function 848 or 839/840. All workstation operators can always unassign themselves from a drawer. You can prevent this by removing the **Unassign Cash Drawer** function key from the touchscreen or restrict its access using a lockout macro.

Configuring a Cash Drawer

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation to be used with the cash drawer.
3. Click the **Transactions** tab.
4. Select the number of **Cash Drawers** (0, 1, or 2) that are physically installed at the workstation.
5. In the **Cash Drawer Beep Timeout** field, enter the number of seconds the cash drawer can be open before the workstation begins beeping. If you set this value to 0 (zero), beeping does not occur.
6. In the **Cash Drawer Notify Timeout** field, enter the number of seconds the cash drawer can be open before the workstation posts a message to the journal log file. If you set this value to 0 (zero), the message does not post to the journal log.
7. Click the **Options** tab, and then click the **Hardware/Cash Drawer** subtab.
8. Select the appropriate cash drawer options.

Table 45-2 Cash Drawer Workstation Options

Option	Description
Require Cash Drawer to be Closed Before New Transaction	Select this option to require the workstation operator to close the cash drawer before beginning a new transaction. Deselect this option to allow transactions to begin while a cash drawer is open.
Assign Cash Drawer By User Workstation	Select this option to allow workstation operators to assign themselves to the cash drawer using the one of the function keys (**848 - Assign Cash Drawer**, **839 - Assign Cash Drawer 1**, or **840 - Assign Cash Drawer 2**). Only the workstation operator assigned to the drawer can open it.

Table 45-2 (Cont.) Cash Drawer Workstation Options

Option	Description
Use Other Cash Drawer for Other Currency	Select this option if two cash drawers are in use for the workstation and one is dedicated to foreign currency.
Require Cash Drawer Assignment to Begin Transaction	Select this option to require a workstation operator to have a cash drawer assigned prior to beginning a transaction at the workstation.

9. Click **Save**.
10. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
11. Click the **Options** tab.
12. Select the appropriate cash drawer options.

Table 45-3 Cash Drawer Control Options

Option	Description
23 - Open Drawer Only if Balance Due is 0.00	Select this option to prevent a tender/media key from opening the cash drawer unless the balance due is $0.00. Deselect this option to allow a tender/media key to open the cash drawer even if there is a balance due on the transaction. If the transaction's subtotal is $0.00 and you set **36 - Do Not Open Cash Drawer if Subtotal is 0.00**, the setting of option **23** is irrelevant.
33 - Employee ID Required With [No Sale] Key	Select this option to prompt for the signed-on workstation operator's employee ID after pressing the **No Sale** key. Deselect this option to allow workstation operators to use the **No Sale** key any time a privileged employee is signed on. This feature is used by staydown operators (such as bartenders or sales clerks) who typically walk away from the workstation, and by prompting for employee ID, mischievous persons cannot open the drawer.
36 - Do Not Open Drawer if Subtotal is 0.00	Select this option to prevent the cash drawer from opening for transactions in which the subtotal is $0.00. Deselect this option to allow the cash drawer to open whenever a workstation operator uses a tender/media key that is configured to open the drawer.

Table 45-3 (Cont.) Cash Drawer Control Options

Option	Description
42 - Always Open Cash Drawer if Change Due	Select this option to allow the cash drawer to open when there are no tenders on the check that should usually open the drawer. The transaction must have change due, and the current tender must not be configured to open the drawer. This option is typically used for Tender/Media records such as gift certificates, where change is issued only if the gift certificate exceeds the value of the transaction (thus, the drawer should be opened to issue change), but the drawer remains closed when the gift certificate does not exceed the transaction's total.
65 - Allow open of Cash Drawer on Service Charge	Select this option to allow the cash drawer to open for transactions where the service charge has a value greater than $0.00, but the subtotal is $0.00. If you selected **36 - Do Not Open if Subtotal is $0.00**, you must also select this option to allow the cash drawer to open for service charge only guest checks.
68 - Require Reason on No Sale	Select this option to require a workstation operator to select a reason code when performing a No Sale operation. When you enter a No Sale Reason, the cash drawer opens only after the workstation operator enters a reason when performing a No Sale transaction. You can set and use No Sale reason codes without activating Enterprise Cash Management (ECM). You can also access No Sale reason codes through extensibility or a System Interface Module (SIM)-based event.
74 - Allow open of Cash Drawer when voiding a tender on a closed check	Select this option to allow the cash drawer to open when there is a tender on the closed check and the workstation operator performs a **Void Closed Check** or **Void Closed Check From List** function.

The cash drawer will always open when using the OpsCheckCashDrawerEvent Extensibility function. When the Extensibility function OpsCheckCashDrawerEvent requests to open a cash drawer, the following cash drawer options are overridden:

- **23 - Open Drawer Only if Balance Due is 0.00**
- **36 - Do Not Open Drawer if Subtotal is 0.00**
- **42 - Always Open Cash Drawer if Change Due**
- **65 - Allow open of Cash Drawer on Service Charge**

13. Click **Save**.
14. Select the Enterprise, click **Configuration**, and then click **Roles**.
15. Select the role type, click the **Operations** tab, and then click the **Miscellaneous** subtab.

16. Select the appropriate options for cash drawer privileges.

Table 45-4 Cash Drawer Privilege Options

Option	Description
17 - Authorize/Perform unassignment of cash drawer from others	Select this option to allow employees in the employee class to use the **Unassign Cash Drawer** function key to unassign cash drawers from other workstation operators. Do not select this option for every employee; set it only for management employee classes. Setting this option allows workstation operators in the employee class to use function keys **839 - Assign Cash Drawer 1** and **840 - Assign Cash Drawer 2**.
34 - Authorize Open Cash Drawer Using the [No Sale] Key	Select this option to allow employees associated with the role to open the cash drawer outside of a transaction using the **No Sale** key, and to authorize non-privileged employees to do so.
88 - Authorize Cash Drawer Reconnection	Select this option to allow employees associated with the role to authorize a cash drawer cable reconnection on a workstation.

17. Click **Save**.

Coin Dispenser

A coin dispenser (sometimes called a coin changer) is a device attached to a workstation that holds coins. A coin dispenser is not assigned to a workstation or server. When connected to a workstation and configured, a cash tender sends commands to the coin dispenser to dispense coins. The coin dispenser controls only the coin portion of a cash transaction. If the customer presents $20.00 to pay a $16.45 guest check, the coin dispenser automatically dispenses $0.55, but the workstation operator must give the remaining $3.00 to the customer.

The coin dispenser hardware varies the coins that are dispensed to avoid depleting a single type of coin. For example, if the device dispenses $0.55 three times in a row, it is probable that both of the following combinations dispense at least once:

- 1 Quarter and 3 Dimes
- 2 Quarters and 1 Nickel

Configuring a Coin Dispenser

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation to open it in form view.
3. Click the **Devices** tab.
4. From the Peripheral Device Configuration section, click **Add**.
5. From the **Select Peripheral Device Type** drop-down list, select **Coin Dispenser**.
6. Enter the **COM Port**, and then click **OK**.
7. Click **Save**.

8. On the workstation, allow the configuration change to download to the POS client.
9. Connect the coin dispenser's serial cable to the appropriate COM port.
10. Restart the workstation.
11. If the workstation is a Win32 client, modify the device settings for the COM port to match the COM Port you set in Step 6.

    Ensure that a workstation with an attached coin dispenser does not have a printer or other device configured for the same COM port as the coin dispenser. Having another device connected but not in use can cause problems with coin dispenser operations.
12. Restart the workstation.
13. Verify that the coin dispenser is connected and ready for operation:
    a. Sign on to the workstation as an employee with PMC privileges.
    b. Launch PMC, and then click the **Functions** tab.
    c. Click **Device Diagnostics**.
    d. Click **Dispense Change**. The coin dispenser dispenses a penny when successfully connected.

Magnetic Stripe Reader

Workstation operators scan magnetic stripe cards using a magnetic stripe reader (MSR) attached to a workstation. Magnetic cards are commonly used as:

- Credit Cards
- Gift Cards
- Employee Identification Cards

Installing the MSR Sleeve for Oracle MICROS Tablet E-Series 8-Inch and 11-Inch Devices

The MSR sleeve for Oracle MICROS Tablet E-Series 8-inch and 11-inch devices supports Transaction Vault Second Generation (TV2G) and data encryption.

Before installing the MSR sleeve driver for Oracle MICROS Tablet E-Series devices, ensure that the device has the following prerequisite requirements:

- Microsoft Windows 8.1 operating system
- Microsoft .NET Framework 4.0 or later

Contact Oracle Support to obtain the VeriFone E23x card reader driver before you begin the following steps.

1. If a previous version of the driver exists, uninstall the old driver components before installing the new driver.
    a. From the Control Panel, select **Programs and Features**.
    b. Uninstall the following components:
        - E23x Driver Installer versions
        - E23x OPOS DLL

- Microsoft POS for .NET 1.12
- OPOS Common Control Objects 1.13.001

2. Run the **E23xDriverInstaller_1.2.0.exe** file, and click **Yes** each time you are prompted.
3. Run the **E23x_OPOS_DLL_Install_1.5.2.0.exe** file, and click **Yes** each time you are prompted.

   The driver and OPOS DLL installation configures a default OPOS device name for the magnetic stripe reader (MSR). Configure Simphony to use the exact name with the MSR.

Configuring a Magnetic Stripe Reader

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation to be used with the MSR.
3. Click the **Options** tab, and then click the **Display/Security** subtab.
4. Select the appropriate MSR options.

Table 45-5 MSR Workstation Options

Option	Description
12 - Mag Card Entry Required for Employee ID	Select this option to allow all employee ID entries at the workstation to be made by swiping a magnetic employee ID card. The workstation does not accept an employee ID number entered through the keyboard or touchscreen.
50 - Mag Card or Fingerprint Scan Required for Employee ID	Select this option to allow all employee ID entries at the workstation to be made using a fingerprint scan or by swiping a magnetic card. That is, employees must swipe a card or scan a fingerprint.
51 - Mag Card and Fingerprint Scan Required for Employee ID	Select this option to allow all employee ID entries at the workstation to be made using a fingerprint scan and by swiping a magnetic card. That is, employees must both swipe a card and scan a fingerprint.

5. If you are using an encrypted MSR (for example, the MSR sleeve for Oracle MICROS Tablet E-Series 8-inch and 11-inch devices with Transaction Vault Second Generation (TV2G)), take note of the following:

> **Note:**
>
> Simphony 19.1 and later no longer support the option **55 - Enable Encrypted Magnetic Stripe Reader Support**.

6. Click the **Devices** tab.
7. Click **Add**, and then select a magnetic stripe reader from the **Select Peripheral Device Type** drop-down list.
8. Select the COM Port Settings (if necessary), and then click **OK**.

9. Click **Save**.

Testing the MSR Sleeve for Oracle MICROS Tablet E-Series 8-Inch and 11-Inch Devices

You can test the MSR swiper functionality after you install the driver and configure the MSR.

1. Copy the **e23xservice.exe** and **e23xD.dll** files to the [Drive Letter]:\Program Files\Verifone\E23xOPOS folder.
2. Close the ServiceHost application.
3. Run **e23xservice.exe**.
4. In the OPOS MSR section of the dialog box, select the following options:
   - **Open**
   - **Claim**
   - **Enable**
   - **D. Ev** (Data Events)

   After each successful swipe attempt, the D. Ev option is deselected.
5. Swipe the magnetic card. If the card swipe was successful, a message appears with the card data.

Barcode Reader Setup

A barcode is an optical machine-readable representation of data. Barcodes are used to quickly order items. Workstation operators scan barcodes using barcode scanners attached to workstations. When a barcode is scanned, the workstation software processes the data and matches it with a menu item configured in the Simphony database.

The Barcodes module in the EMC lets you configure barcode menu item ordering. The Barcodes module allows you to:

- Associate many different barcodes with the same menu item (for example, pricing chewing gum items the same).
- Associate two different prices of one definition with different barcodes (for example, small or large coffee).
- Use a maximum of 14-digit barcode.

Configuring a Barcode Reader

1. Select the Enterprise, property, or revenue center click **Configuration**, and then click **Barcodes**.
2. Insert a barcode record.
3. In the **Barcode** column, enter the numeric value that the barcode represents.
4. Click the ellipsis point (...) button in the **Master** column, select the master menu item to be ordered when the barcode is entered, and then click **OK**.
5. In the **Definition** column, select the Menu Item Definition (belonging to the selected Menu Item Master) to be ordered when the barcode is entered. If you select **0 - All Definitions**,

the workstation determines which definition to order at the time the barcode is entered, based on active Menu Levels and other criteria.

This column is only active when you set the Menu Item Master column to a value other than **0 - None**.

6. In the **Price #** column, select the Menu Item Price (belonging to the selected Menu Item Definition) to be ordered when the barcode is entered. If you select **0 - All Prices**, the workstation determines which price to order at the time the barcode is entered, based on active Menu Levels and other criteria.

   This column is only active when you set the Menu Item Definition column to a value other than **0 - All Definitions**.

7. In the **Alternate Price** column, enter the price to charge for the item when the barcode is entered.

   This value is used only when you set a value greater than 0.00; if the value is 0.00, the price from the Menu Item Price record is used.

8. In the **Alternate Prep Cost** column, enter the prep cost to use for the item when it is ordered by the barcode.

   This value is used only when you set a value greater than 0.00; if the value is 0.00, the prep cost from the Menu Item Price record is used.

9. Click **Save**.
10. Select the Enterprise or property, click **Setup**, and then click **Barcode Format Sets**.
11. Insert a barcode format set record, and then double-click it.
12. Click **Add**.
13. In the **Input Length** field, enter the number of digits in the scanned barcodes.
14. In the **Returned Start** field, enter the first digit to use in the numeric value to return.
15. In the **Returned Length** field, enter the number of digits to read as the numeric value to return.
16. Click **Save**.
17. Select the property, click **Setup**, and then click **Workstations**.
18. Double-click the workstation to be used with the barcode reader.
19. Click the **Transactions** tab.
20. Select the **Barcode Format Set** for the workstation to use.

    The Barcode Format Set determines how the workstation reads barcodes of various lengths.

21. Click the **Devices** tab.
22. Click **Add**, and then select the barcode reader from the **Select Peripheral Device Type** drop-down list.
23. Select the COM Port Settings (if necessary), and then click **OK**.
24. Click **Save**.

Configuring the 1D/2D Imager Scanner

You can configure the 1D/2D Imager Scanner for use with the Oracle MICROS Workstation 6 Series and Oracle MICROS Compact Workstation 310.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation record to open it.
3. Click the **Devices** tab.
4. Click **Add** in the **Peripheral Device Configuration** section.
5. From the **Select Peripheral Device Type** drop-down list, select **Generic Barcode Reader**.
6. Under **COM Port Settings**, select the **COM PORT**.

   The default **COM Port** setting is **COM14**.

   To find the appropriate COM number, navigate to the workstation device manager and locate the COM number associated with the workstation.
7. Click **Save**.
8. After configuration in EMC, update the workstation.
9. Following the update, shut down the workstation, and then connect the scanner.

   The workstation should **always** be turned off when connecting or disconnecting a scanner.
10. Restart the workstation.
11. Verify that the scanner is successfully initialized with the workstation.

Fingerprint Scanning

This section describes fingerprint scanning. Fingerprint scanning provides greater security by verifying an employee's identify. You can use an external USB fingerprint reader with the following devices to scan fingerprints:

- Oracle MICROS Tablet E-Series
- Oracle MICROS Workstation 6 Series
- Oracle MICROS Workstation 5a
- Oracle MICROS PC Workstation 2015
- A PC running a Simphony client that is attached to the PC with a USB connection

You can require employees to scan fingerprints when performing the following operations:

- Signing in to a workstation
- Clocking in and out
- Authorizing privileged operations

Privileged employees can perform the following actions:

- Enroll themselves and other employees' fingerprints in Simphony
- Register up to ten different fingers (in the event that employee digits become incapacitated (cut, removed, or bandaged))

At registration, the employee places a finger on the fingerprint reader. The reader scans the fingerprint and captures its characteristics (an array of pixels) as Fingerprint Image Data (FID). The reader then extracts fingerprint features as Fingerprint Minutiae Data (FMD) and creates a data record that is stored in database tables in the cloud and in the POS clients where the employee signs in. At sign-in, the reader captures fingerprint data and then uses FMD records to search the local database for a match. If a match is found, the action is performed (such as

sign-in). The system does not store pictures, photographs, or images of the fingerprint. There is no way to reconstruct the fingerprint using the stored data.

Auditors can determine whether an employee performed an authorization using a fingerprint reader, manual entry, or magnetic card swipe.

Simphony does not store the fingerprint image. Simphony uses only a mathematical identification of the image. The data stored is similar to a hash of the fingerprint and cannot be used to reconstruct the fingerprint. Collecting or enrolling employee fingerprints is a privileged operation, typically requiring manager authorization. The data is protected at rest and in transit within the Simphony application using the same approaches that all sensitive data is protected. When an employee is deleted from the system, the stored fingerprint data for that employee is also deleted. This applies to all storage at the enterprise and on premise. In current versions, the timing of when an employee is deleted from the system is determined by when a privileged user manually deletes the employee record in EMC.

Biometric data is stored in the Employee table for the Enterprise database, CAPS database, and Datastore database. The following queries can be used to demonstrate that no fingerprint data is present:

- To show the count of employees with any biometric data:

```
SELECT
    count(*) AS "EMPLOYEES WITH BIOMETRIC DATA"
FROM
    EMPLOYEE
WHERE
    fingerprinttemplate1 IS NOT NULL or fingerprinttemplate2 IS NOT NULL
or fingerprinttemplate3 IS NOT NULL or
    fingerprintnewtemplate1 IS NOT NULL or fingerprintnewtemplate2 IS NOT
NULL or fingerprintnewtemplate3 IS NOT NULL;
```

- To show employee and fingerprint columns:

```
select FIRSTNAME, LASTNAME, FINGERPRINTTEMPLATE1, FINGERPRINTTEMPLATE2,
FINGERPRINTTEMPLATE3, FINGERPRINTNEWTEMPLATE1, FINGERPRINTNEWTEMPLATE2,
FINGERPRINTNEWTEMPLATE3 from EMPLOYEE;
```

> **Note:**
>
> – Neurotec templates are stored in FINGERPRINTTEMPLATE1, FINGERPRINTTEMPLATE2, FINGERPRINTTEMPLATE3
>
> – UrU templates are stored in FINGERPRINTNEWTEMPLATE1, FINGERPRINTNEWTEMPLATE2, FINGERPRINTNEWTEMPLATE3

Configuring Employee Privileges for the Fingerprint Reader

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **PMC General/Reports** subtab.
3. To allow employees associated with the role to open the Property Management Console (PMC) using function key 300, select **30001 - Run PMC**.

4. Click the **PMC Procedures** subtab.
5. Select **30055 - Assign Employee Fingerprint Scan** and **30052 - Assign Employee PIN**.
6. Click **Save**.

Configuring the Touchscreen Home or Sign In Page to Assign Employee Personal Identification Number (PIN)

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the Home or Sign In page.
3. On the **Edit** tab, click **Button**.
4. On the **General** subtab, enter **Assign PIN** in the **Legend** field.
5. Select **Function** from the **Type** drop-down list.
6. Click the black arrow directly beneath the **Type** drop-down list, and then select **Assign Employee PIN**.
7. Position and size the button on the page. Use the Style arrow to change the color.
8. Click **Save**.

Configuring the Workstation Employee Fingerprint Sign In Options

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation to use with a fingerprint reader.
3. Click the **Options** tab.
4. Select the appropriate security options as described in the following table.

Table 45-6 Employee Security Options

Option	Selecting This Option Requires That All Employees …
47 - Fingerprint Scan Required for Employee ID	Scan a fingerprint.
48 - Employee ID or Fingerprint Scan Required for Employee ID	Scan a fingerprint or enter the employee ID number.
49 - Employee ID and Fingerprint Scan Required for Employee ID	Scan a fingerprint and enter the employee ID number.
50 - Mag Card or Fingerprint Scan Required for Employee ID	Scan a fingerprint or swipe an employee ID card.
51 - Mag Card and Fingerprint Scan Required for Employee ID	Scan a fingerprint and swipe an employee ID card.

5. Click **Save**.

Scanning a Fingerprint

You can scan (also called enroll) a fingerprint using a workstation or from the EMC.

If you upgrade Simphony to version 2.9.1 or later, you must deploy the Biometrics 5.0 CAL package, and then re-enroll fingers with an Oracle MICROS or DigitalPersona fingerprint reader. To re-enroll, attach an Oracle MICROS or DigitalPersona fingerprint reader to the workstation, scan an already enrolled finger to sign on to the workstation, and then click **OK** at the prompt to re-enroll.

> **Note:**
>
> Starting with the Simphony 19.2 release, a **Delete Enrollment** button has been added and made available during the fingerprint enrollment procedure. Prior to Simphony 19.2, the employee fingerprint data could only be removed when an employees record was deleted from the EMC.

1. To scan (initially enroll) a fingerprint using a workstation:
    a. Sign on to the workstation as an employee with the proper role privileges, using an employee ID.
    b. Click the **PMC** button, and then click the **Functions** tab.
    c. Click the **Edit Employee PIN** function.
    d. Select the employee whose fingerprints need to be scanned.
    e. Click the **Enroll Fingerprint** button.
    f. Follow the prompts to enroll up to three fingers for one employee. Click **Yes** at the prompt to scan the same finger four times, or click **No** to return to the Select Employee dialog.
    g. Place the finger to scan on the fingerprint reader, and then remove it when the scan is complete. Each finger is scanned four times. The scanner flashes while scanning and remains lit after the scan is complete. Repeat this step for each finger.
2. To scan (initially enroll) a fingerprint using the EMC:
    a. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
    b. Search for and select the employee record.
    c. On the **General** subtab, click the **Fingerprint Enrollment** button.
    d. Follow the prompts to enroll one or more fingerprints.

Configuring a Scale

A scale connects to the workstation and is used for menu items that are priced by weight (for example, salad bar). You can configure Simphony to calculate weight in ounces, pounds, or kilograms.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation to open it in form view.

3. Click the **Devices** tab.
4. From the Peripheral Device Configuration section, click **Add**.
5. From the **Select Peripheral Device Type** drop-down list, select **Scale (Serial)**.
6. Enter the **COM Port** to which the scale connects.
7. Select the following settings, and then click **OK**:
   - **Baud Rate**: 9600
   - **Parity**: E
   - **Data Bits**: 7
   - **Stop Bits**: 1
8. (Optional) If you are using an Oracle MICROS Tablet E-Series, click the **Display/Security** subtab, and then deselect **39 - Floating tablet**.
9. Click **Save**.
10. On the workstation, allow the configuration change to download to the POS client.
11. Connect the scale's serial cable to the workstation's serial COM port.
12. Connect the scale's power cord to the outlet.
13. Restart the workstation.
14. Verify that the scale is connected and ready for operation:
    a. Sign on to the workstation as an employee with PMC privileges.
    b. Launch PMC, and then click the **Functions** tab.
    c. Click **Device Diagnostics**.
    d. Click **Get Scale Weight**.
    e. Place a weighed menu item on the scale and add the menu item to a guest check.

Sales Recording Module (SRM)

An SRM is a microcomputer designed to be connected to a cash register or POS system. It records transaction information such as sales and tax data in a secure memory. After data transmission begins, the SRM device sends the necessary information to a printer which prints a customer receipt with a barcode and information about the restaurant. The SRM is used to produce reports such as a Periodic Sales Summary Report which contains information on sales and transactions carried out over a given period.

Restaurant owners who are also a Quebec Sales Tax (QST) registrant must produce customer receipts using an SRM device and submit a receipt to the customer upon sale of a meal.

Enabling SRM for a Property

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. On the Options tab, select **38 - Enable Sales Recording Module**, and then click **Save**.

Configuring SRM Payment Types for Tenders

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Tender/Media**.

2. Double-click a Tender Media record to open it.
3. On the General tab, select the appropriate **SRM Payment Type** for the tender.

   The SRM payment types are:

   - **1 - ARG**: Select this option for cash payments.
   - **2 - CRE**: Select this option for credit card payments.
   - **3 - DEB**: Select this option for Canadian debit card payments.
   - **4 - AUT**: Select this option for other payment types such as gift cards.
   - **5 - PKG**: Select this option for full payments where the check value posts to a third party system.
4. If you selected SRM payment type **5 - PKG**, click the **Options** tab, click the **Taxing Options** subtab, and then click **Select All** to exempt all taxes from the tender.

   If you do not exempt all taxes, they will post both to the SRM as well the third-party application, resulting in duplicate tax entries.
5. Click the **Options** tab, click the **Printing Options** subtab, and then select the following options:

   - **8 - Print Customer Receipt**
   - **21 - Print Summary Totals**
   - **22 - Print Check Trailer**
   - **23 - Print Check on Demand**
   - **28 - Print Guest Check Trailer on Fast Transaction Customer Receipt**
6. To have the tender print a special/duplicate receipt for the merchant, click the **Miscellaneous Options** subtab, and then select **84 - Quebec SRM Duplicate**.

   The printed receipt does not include a barcode. This option is used with the Quebec SRM Printer type.

   When option **84** is enabled for the assigned **Default Reprint Check Tender/Media**, the system does not print barcodes on receipts for split checks.
7. Click **Save**.
8. Repeat Steps 2 through 7 for all tenders that you have configured.

Enabling SRM for Printers

1. Select the property, click **Setup**, and then click **Printers**.
2. Double-click the record for a printer that has an SRM device attached, select **Quebec SRM Device**, and then click **Save**.
3. Repeat Step 2 for all printers that have an SRM device.

Configuring the Quebec SRM Control Button

You can configure a touchscreen button to allow workstation operators to enable and disable the SRM device locally through the POS client.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.

2. Double-click the page on which you want the button to appear on the workstation.
3. Insert a new button.
4. On the General tab, select **Function** as the **Type**, and then click the right arrow directly beneath the **Type** drop-down menu.
5. Select **Fiscal** from the Type pane, select **Quebec SRM Control** from the Results pane, and then click **OK**.
6. Enter a **Legend**, and click **Save**.

Allowing Employees to Enable and Disable SRM from the Workstation

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type record (for example, administrator, manager or server).
3. Click the Operations tab, click the Miscellaneous sub-tab, scroll down to Miscellaneous Options , and then select **162 - Authorize/Use Quebec SRM Control Function**.
4. Click **Save**.

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Reporting

Various Simphony reports are accessible from Oracle Hospitality Reporting and Analytics, and at the workstation. Reporting and Analytics reports provide access to Enterprise, property, zone, and revenue center information. Workstation reports provide access to property and revenue center totals. You can assign privileges to allow employees to run reports.

Allowing Employees to Run Reports

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **PMC General/Reports** sub-tab.
3. Select **30001 - Run PMC** to allow employees associated with the role to launch the Property Management Console (PMC) on the workstation using Function Key 300, Launch PMC.
4. Click the **Ad Hoc Reports** tab.
5. From the Report Options section, select the reports you want employees to run.
6. Click **Save**.

List of Workstation PMC Reports

Authorized employees can run the following Property Management Console (PMC) reports when the workstation is in online mode:

Table 46-1 PMC Reports in Online Mode

Report	Description
Financial Report	Provides financial reporting for a property, revenue center, or employee. The Employee Financial Report is based on all sales-related entries, such as checks opened, menu items ordered, and the number and amount of service charges, discounts, and tenders applied. You can use this report to balance the server's bank, and to track individual performance.
Employee Open Check Report	Provides a list of all open checks belonging to an employee at the time the report is taken. Checks appear in the following order: employee, property or revenue center, and event.

Table 46-1 (Cont.) PMC Reports in Online Mode

Report	Description
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 appear in the following order: employee, property or revenue center, and event. Closed Check Report Codes contains more information on the status indicator codes for Closed Check Reports.
Employee Tip Report	Provides a list of tippable sales in the form of gross receipts from Food and Beverage, charge tips, service charges, tips paid, direct and indirect tip declaration, and percent of tips to sales.
Employee Labor Detail Report	Provides an account of work performed by each employee. The report includes the dates, times, and job rates of each clock-in and clock-out, the total hours of regular and overtime worked at each job code, and the gross pay earned.
Employee Labor Summary Report	Provides a summary of the regular and overtime hours worked by each employee at each of their assigned pay rates.
Cashier Financial Report	Provides financial information for each cashier, including tenders and tips paid.
Major Group Sales Report	Provides sales totals for each major group.
Family Group Sales Report	Provides sales totals for each family group.
Menu Item Summary Report	Provides a list of all menu items (not including non-revenue menu items).
Menu Item Sales Report	Provides sales totals for each menu item (not including non-revenue menu items).
Non Revenue Menu Item Sales	Provides sales totals based on the assigned Report Group for all non-revenue menu items.
Non Revenue Menu Item Summary	Provides a summary of non-revenue menu item sales.
Time Period Detail Report	Shows each time period as a full report, with a similar format to a system financial report (sales, check profiles, tracking group).
Time Period Summary Report	Lists each time period with sales information.
Serving Period Financial Report	Provides financial reporting by serving period.
Table Sales Report	Provides total sales, guest counts, check counts, and Table Turns by table number.
Clock-in Status Report	Provides a list of employees who are currently clocked in or on a break.
Labor Availability Report	Provides a count of all employees clocked in or on break as of the time the report is taken.

Table 46-1 (Cont.) PMC Reports in Online Mode

Report	Description
Job Code Report	Summarizes all employee labor totals by job code.
Autofire Open Check	Provides a list of all checks that are scheduled for autofire at the time the report is run. Checks appear by employee, property or revenue center, and event, and sorted by scheduled date and time.
Employee Journal Report	Provides a journal of all sales transactions by a specific employee shown in a check detail area.
Check Journal Report	Provides a journal of all sales transactions in a check detail area.
Tax Summary Report	Provides a list of tax rates.

Authorized employees can run the following Property Management Console (PMC) reports when the workstation is in offline mode:

Table 46-2 PMC Reports in Offline Mode

Report	Description
Offline Revenue Center Financial Report	Provides financial reporting for a revenue center or employee.
Offline Employee Financial Report	The Employee Financial Report is based on all sales-related entries, such as checks opened, menu items ordered, and the number and amount of service charges, discounts, and tenders applied. You can use this report to balance the server's bank, and to track individual performance.
Offline Cashier Financial Report	Provides financial information for each cashier, including tenders and tips paid.
Offline Employee Open Check Report	Provides a list of all open checks belonging to an employee at the time the report is taken. Checks appear in the following order: employee, revenue center, and event.
	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.

Closed Check Report Codes

The **Status Indicator** field prints to the left of the check number and indicates how the check was closed. Several entries can apply to the same check, and they are printed in a string. The following table lists and describes the Status Indicators for Closed Check Report Codes.

Table 46-3 Status Indicator Codes for Closed Check Report

Code	Name	Description
A	Add	The detail from this check was added to another check.
a	Add	The detail from this check was received from another check.
C	Canceled	The check was re-opened and immediately closed, using the **Transaction Cancel** key.
f	Fast Transaction	The check was created during a fast transaction.
j	Adjusted	The check was re-opened with the **Adjust Closed Check** key, and the tender or tip was adjusted.
R	Re-opened	This is the original check that was re-opened with the **Reopen Closed Check** key.
r	Re-opened	This is the check that was created when re-opening a check.
S	Split	This is the original check before it was split.
s	Split	This is the check that was created when splitting a check.
T	Training	This check was opened and closed by a workstation operator who was in training mode.
X	Transferred from check	The detail from this check was added to another check, which is in a different revenue center. This symbol appears only if the transfer was between revenue centers.
x	Transferred to check	The detail from this check was received from another check in a different revenue center.
!	Open on system	This check was accessed while it was open on the system.
O	Offline	This check was created offline.
B	Batched	This check was batched.

Configuring Employee Privileges for Oracle MICROS Reporting and Analytics

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.

2. Search for the employee record.
3. Click the **Employee Records** tab near the lower area of the screen, and then double-click the object number of the appropriate record.
4. Click the **Reporting** tab to configure an employee's settings as they pertain to logging in to Reporting and Analytics.

> **Note:**
>
> If you install or upgrade to Enterprise Back Office version 20.1 (which includes Reporting and Analytics and MyLabor) in conjunction with installing or upgrading Simphony to either 19.1.2 or 19.2, the Simphony EMC's Employee Maintenance, Reporting tab is now disabled (or has been removed). Going forward, new reporting users need to be added and configured in R&A. Reporting access passwords are no longer synchronized between Simphony and R&A.
> If you still utilize Enterprise Back Office version 9.1, the Simphony EMC's Employee Maintenance, Reporting tab is still accessible and configurable as usual.

5. To grant the employee an active account in the Reporting and Analytics database, select **Active**.
6. To make the employee a default user for all Reporting and Analytics employee records associated with the same role, select **Default User**. This allows new employees in Reporting and Analytics who share the same role to use the same settings as this employee.
7. From the **Role** drop-down list, select **Workstation Report**.
8. Click **Save**.

For users of R&A prior to the 20.1 release, the *Oracle MICROS Reporting and Analytics User Guide*, located at https://docs.oracle.com/cd/E80526_01/doc.91/e82050/toc.htm, contains information about enabling reports in Reporting and Analytics.

For users of R&A version 20.1, see the *Enterprise Back Office 20.1* documentation, specifically the Add users content contained there, for more information about adding user portals to R&A.

Configuring the Log Files for Oracle MICROS Reporting and Analytics

1. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **mymicros.net** tab, and then enter the appropriate information. The following table describes the fields.

Table 46-4 Reporting and Analytics Settings

Field	Description
Logs to Keep	Enter the number of Data Transfer Service (DTS) logs to retain.
Error Files to Keep (days	Enter the number of days the application retains error file logs.

Table 46-4 (Cont.) Reporting and Analytics Settings

Field	Description
Verbosity	Select the Verbosity level for DTS logging. You should typically set this value to **Normal**. Set verbose logging to **Extended** or **Super** for troubleshooting as these elevated levels create large log files and slow performance.
mymicros.net Machine Name	Enter the name of the Reporting and Analytics server computer using the format http://[YourReportingAndAnalyticsUrl].
Enterprise mylabor URL	If DTS uses a different Internet Protocol (IP) address to connect to Oracle MICROS Labor Management, enter the URL. Use the format http://[Name or IP address of the Reporting and Analytics portal server]. If you leave this field blank, DTS uses the Reporting and Analytics machine name to post Labor Management. Workstations do not use this URL.
Organization ID	Do not change this value unless instructed by your Oracle representative. This field represents the Enterprise organization ID used for reporting to Oracle MICROS Reporting and Analytics.
17 - Send selected translations to Simphony Reports	Select this option to send definition translations to Simphony reports. You must also select the **Send Translations for this Language to Simphony Reports** option from the Language module for each language to be sent to Simphony reports.

3. Click **Save**.

The *Oracle MICROS Reporting and Analytics User Guide*, located at http://docs.oracle.com/en/industries/hospitality/, contains information about enabling reports in Reporting and Analytics.

Configuring Headers and Trailers for Printed Workstation Ad-hoc and Custom Reports

You can configure the printing of report header and trailers for workstation ad-hoc or custom reports containing site specific information. Audit procedures in certain countries require that reports have specific information. This information can be defined in report headers and trailers. Printing information, such as the site's business address or tax identifier, on report headers (or trailers) helps identify the source (or location name) of the data to which the report pertains.

This is a different configuration from Configuring Guest Check Headers and Trailers.

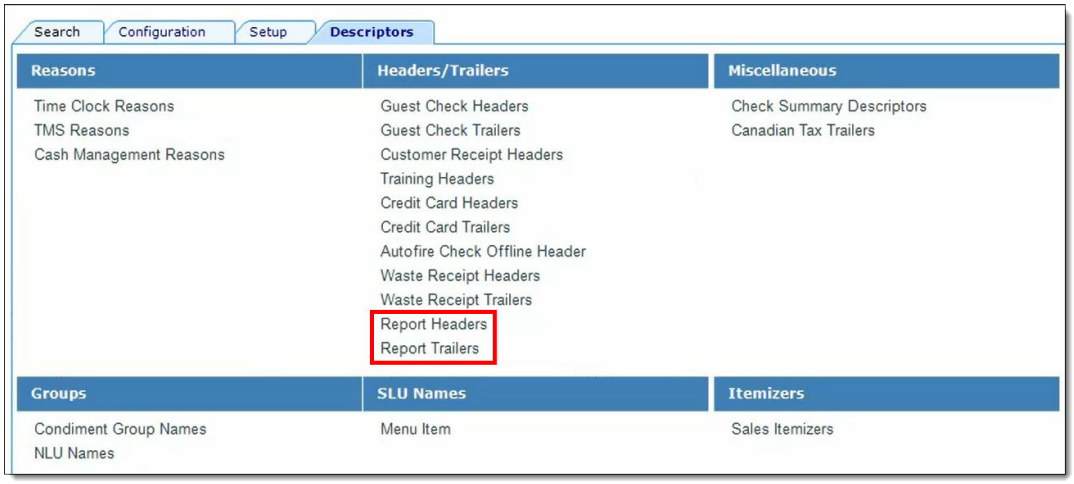
To configure headers and trailers for printed workstation ad-hoc and custom Reports:

1. You must have access privileges assigned from the employee **Roles** module. In the **EMC Modules** tab, set the user's role settings to View and Edit the **Report Headers** and **Report Trailers** modules located under the **Descriptors** module heading. Once set, click **Save**.

See Employees and Privileges for more information about configuring employee roles and access privileges.

2. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click **Report Headers**.

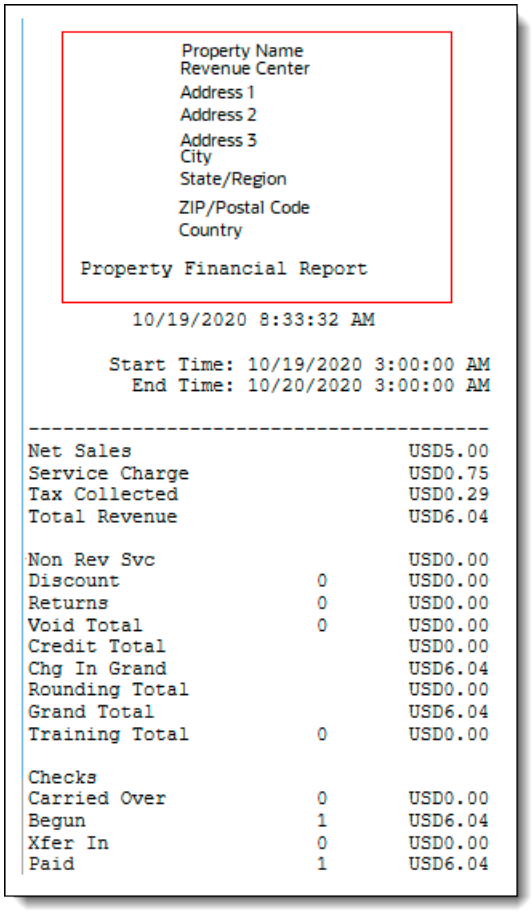
Figure 46-1 Simphony EMC Report Headers and Trailers Modules



Note:

It is possible to configure differing report headers and trailers based on the scope your reports are generated from, such as the Enterprise, property, or revenue center level. For example, a property level report might contain different report headers/trailers than a revenue center level report. If this is desired behavior for your system, you need to switch to each specific EMC level and configure the different report headers/trailers for each level.

Figure 46-2 Printed Financial Report Header Example



Property Name
Revenue Center
Address 1
Address 2
Address 3
City
State/Region
ZIP/Postal Code
Country

Property Financial Report

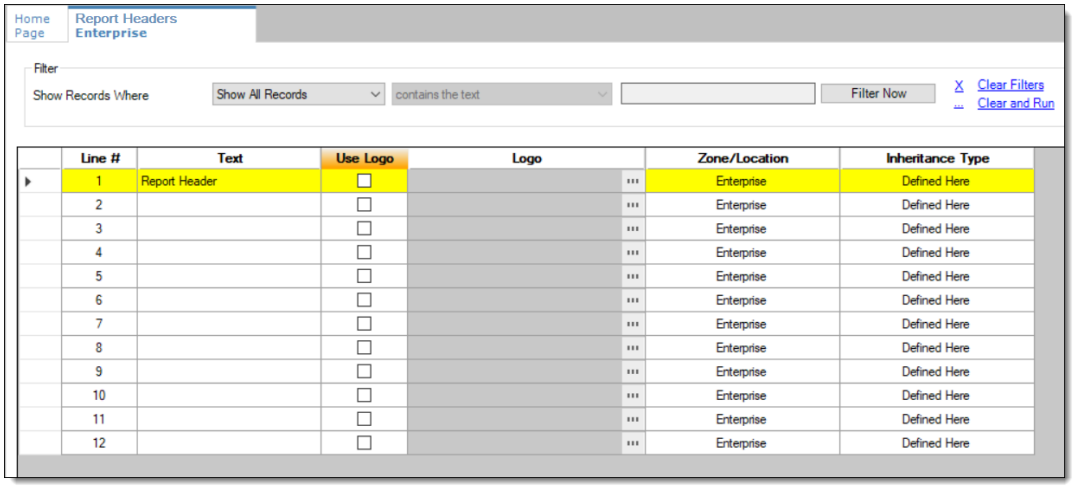
10/19/2020 8:33:32 AM

Start Time: 10/19/2020 3:00:00 AM
End Time: 10/20/2020 3:00:00 AM

Net Sales		USD5.00
Service Charge		USD0.75
Tax Collected		USD0.29
Total Revenue		USD6.04
Non Rev Svc		USD0.00
Discount	0	USD0.00
Returns	0	USD0.00
Void Total	0	USD0.00
Credit Total		USD0.00
Chg In Grand		USD6.04
Rounding Total		USD0.00
Grand Total		USD6.04
Training Total	0	USD0.00
Checks		
Carried Over	0	USD0.00
Begun	1	USD6.04
Xfer In	0	USD0.00
Paid	1	USD6.04

3. The Report Headers and Report Trailers modules each contain a total of 12 lines which can be configured. No new lines can be inserted. From top to bottom, in descending order, enter information in the **Text** column as you want the header to print on the report.

Figure 46-3 EMC Descriptors Report Headers Module



Home Page | Report Headers Enterprise

Filter
Show Records Where | Show All Records | contains the text | Filter Now | X Clear Filters | Clear and Run

Line #	Text	Use Logo	Logo	Zone/Location	Inheritance Type
1	Report Header	☐		Enterprise	Defined Here
2		☐		Enterprise	Defined Here
3		☐		Enterprise	Defined Here
4		☐		Enterprise	Defined Here
5		☐		Enterprise	Defined Here
6		☐		Enterprise	Defined Here
7		☐		Enterprise	Defined Here
8		☐		Enterprise	Defined Here
9		☐		Enterprise	Defined Here
10		☐		Enterprise	Defined Here
11		☐		Enterprise	Defined Here
12		☐		Enterprise	Defined Here

4. From any line, if you want to print your company's logo, select **Use Logo**.

5. From the **Logo** column, click the ellipsis symbol (**...**), and then select the available logo (which must be configured prior to this configuration).

   This configuration supports logo printing using the same functionality/limitations as for any existing header and trailer lines. See Logo Printing for more information.

6. To create a space or blank line between any other lines, such lines only print when populated lines are defined on a higher line-number.

7. Repeat Steps 2 through 6 to configure the Report Trailers module. The report trailer appears near the bottom of the printed report.

8. Click **Save**.

Viewing Move History Logs

Database administrators can use the EMC to verify Reporting and Analytics Daily Aggregation and to review the Move History logs of the database. The self-service access to information in EMC eliminates the need to consult the Oracle Hospitality Simphony Data Transfer Service (DTS) log on the application server. Daily Aggregation is logged for each property and each business date.

This feature is compatible with Reporting and Analytics version 9.0 Patch 8 and later.

1. Select the Enterprise level, click **Configuration**, and then click **PC Autosequences**.

2. Double-click the Reporting and Analytics Daily Aggregation record to open it.

3. Click the **Execution History** tab, and then click **Get History**. The list of all Move History Logs appears.

   The Move History logs of the database are listed by date, along with details such as ID, Insert Date, Start Date, Finish Date, Property, and Complete Code (status). If the Complete Code shows Failed, the **Reprocess** button becomes active for a specific property and business date. You can click the **Reprocess** button to set a flag for the DTS to update the Reporting and Analytics Aggregation Service to process the record again.

4. To limit the information shown, select the **Property**, and the **Date Range**, and then click the **Filter** button.

   The maximum date range is 7 days. If you do not select a date at the beginning (default state), the system shows only yesterday and today's dates.

5. Highlight a record in the Execution History section, and then click **Show Details**. The Execution Detail section shows the date and time that the autosequence started and stopped and additional messages, such as property, location, and status (success or error).

6. Click **Save**.

Configuring Data Retention Limits

Database administrators can set the length of time data (for example, ECM and Reporting and Analytics aggregation) remains present in the database at the Enterprise and property levels.

1. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.

2. Click the **Miscellaneous** tab.

3. To set data retention limits, in the Purging section, enter the **Days To Keep** for the **Purge Type**.

This is the number of days from the time a transaction is reported to the enterprise that the application retains it for use in reporting and auditing (for example, from 1 day to 999 days). After the number of days to keep expires, a scheduled event purges the data. By default, the purging jobs purge 1000 records per batch.

- To set ECM data retention, enter the number of days for **ECM Transaction Detail**.
- To change the PC Autosequences data retention, enter the number of days for the **Pcasequence Log**.

  Oracle recommends that you leave the default value set at **90** days, and that a subject matter expert change this setting if necessary. The **Pcasequence Log Purge Type** is available in Simphony version 2.10 and later and is compatible with Reporting and Analytics version 9.0 Patch 8 and later.

4. Click **Save**.

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Auditing

You can use the Audit Trail module to view additions, changes, and deletions made through the EMC and through PMC Procedures. In addition, the Audit Trail reports on successful and failed logins to EMC, PMC Report takers, Key Manager activity, and Audit Trail purges.

In almost every module, you can audit an individual record or a group of similar records. The results usually show the record or records at a specific position. For example, consider the following actions:

1. Add a Tender Media record at Object Number 1234.
2. Change the record's name to Cash.
3. Delete the record.
4. Add a new record at Object Number 1234.
5. Change the record's name to MasterCard.

After performing these steps, the Audit This Record results show all five of the changes (not just the changes for steps 4 and 5). Although the first Tender Media record was deleted, it is considered "this record" for functional purposes. In short, all records at the same object number are treated as "this record" and are included in the results.

Using the Audit Trail

You must have the privilege to access the audit trial at the Enterprise or property level. When an Audit Trail report is taken, the activity is logged to the Audit Trail. All Audit Trail Reports taken are logged as an Enterprise level activity. You can use the Audit Trail two different ways: to view the history of a specific record or to perform a general search throughout the entire system.

1. Select the Enterprise or property, click **Tasks**, and then click **Audit Trail**.
2. To perform a quick search on the **Search** tab:
   a. Select the timeframe from the **All Changes In** drop-down list.
   b. Click the **Run Quick Search** button.

   When you perform a quick search, the application ignores the values in the standard search fields.
3. To perform a standard search, enter or select information in the following fields, and then click the **Search** button.

Table 47-1 Audit Trail Standard Search Fields

Field	Description
Application	Select an application from the drop-down list. Depending on your selection, the **Module** drop-down list is active or dimmed. For example, when you select **EMC**, the **Module** drop-down list shows a list of EMC modules.

Table 47-1 (Cont.) Audit Trail Standard Search Fields

Field	Description
Module	Select a module from the drop-down list. This field is active only when the **Application** selection allows a choice of modules. Depending on your selection, the **Object Numbers** field is active or dimmed. For example, when you select **EMC** from the **Application** drop-down list and **Discounts** from the **Module** drop-down list, the **Object Numbers** field becomes active.
(Optional) Object Numbers	Enter an object number or range to retrieve results based on specific records only. Leave this field blank to have the Audit Trail find all object numbers.
Operation	Select an operation from the drop-down list. This field is active based on a combination of the **Application** and **Module** selections.
Zone/Location	Select a zone or location. When you open the Audit Trail from the Enterprise level, this field allows a selection of any property, zone, or revenue centers. When you open the Audit Trail from the property level, this field allows a selection of revenue centers within the property.
Employee	Click the **Select** link, select an employee, and then click **OK**. When you select a specific employee, only changes made by that employee are included in the results. Click the **Me** link to include only the logged-in employee.
Date Range	Select the date range to use to query the Audit Trail. Select **User-Defined** to activate the **Start** and **End** fields.
(Optional) Start and End	To narrow your query to a specific date or date range, select the start and end dates and times. Select **All Dates** to include all dates in the query.
(Optional) Old/New Values	Enter text for use in the query. This can be useful in finding a specific change to a record, such as when a Hamburger item was renamed to Cheeseburger.
Preserve Previous Results	Select this option to merge the search results with the previous search results, instead of overwriting them. Deselect this option to see only the results of the most recent search.

4. If the number of results that will be returned exceeds the pre-set thresholds for Audit Trail results (for example, 10,000 records or more), the application prompts you to confirm the action.
5. To view the search results for a quick search or a standard search, click the **Results** tab.

a. To save the results, click the **Save to Disk** button, select the directory, and then click the **Save** button.

b. To copy the results into another application (such as Notepad or email) without storing the information, click the **Formatted Results** button, and then click the **Copy** button.

6. To manually remove old records from the Audit Trail table in the database, click the **Purge** tab.

   The **Purge** tab is visible only at the Enterprise level, and you must have the Purge Audit Trail privilege.

7. Select the date before which the records will be purged, and then click the **Purge** button. For example, if you select 9/1/2016, the application deletes all records from September 1, 2016 and earlier.

   Records are deleted based on the UTC date of the Audit Trail record.

   In addition to this manually initiated purge, the Data Transfer Service (DTS) purges Audit Trail records automatically.

Using Audit This Record

1. Select the Enterprise or property, and then open a module that contains at least one record.
2. Highlight one or more records, right-click inside the first column, and then select either **Audit This Record** (single record) or **Audit Selected Records** (multiple records). The **Audit Record** tab shows the information for the selected records.

   Alternatively, from the EMC toolbar, click **Edit**, and then select **Audit This Record**.
3. To run specific queries on the selected record or records, click the **Show Advanced Options** link.
4. Use the same search parameters that are available in the Audit Trail module. See Using the Audit Trail for more information.

48

Importing and Exporting Data

The Simphony Import/Export Service allows you to:

- Import and export Simphony application data in a comma-separated values (CSV) format, to or from spreadsheet applications
- Import configuration data into the Simphony application database that can be called by external systems, such as a web service application programming interface (API)
- Export configuration data from Simphony that can be called by external systems, such as an on premise inventory management application

The main benefits of this service are:

- Allows you to load configuration data in bulk (for example, making a large number of price changes for menu items, which reduces the amount of time it takes to configure systems)
- Allows third parties to integrate with customer databases (either self-hosted or hosted within an Oracle facility), without providing direct access to the application file server or database
- Allows third parties to build custom interfaces

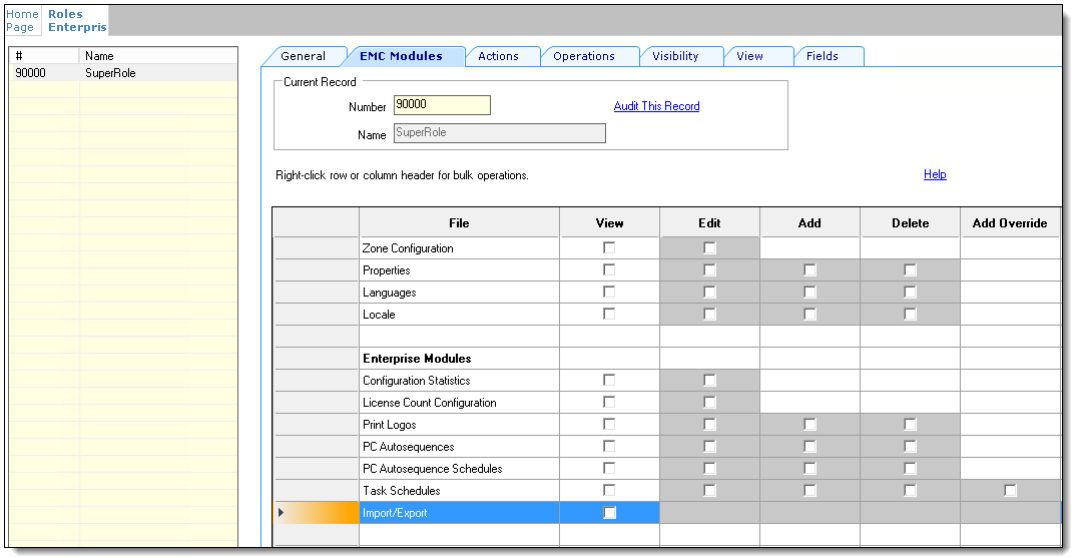
See the *MICROS Simphony Manager User Guide* for more information about importing and exporting data.

Configuring the Import/Export Service Privileges

You need to configure privileges to allow the appropriate employees to view and access the Simphony Import/Export service from the Simphony Web Portal (SWP).

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role, and then click the **EMC Modules** tab.
3. Scroll down to the **Import/Export** setting located within the **File** column under the Enterprise Modules section. The **View** setting controls the visibility of the Import/Export service on the SWP toolbar for staff assigned this role.
4. To enable visibility of the Import/Export service from the SWP, select the **View** checkbox and **Save**.
5. To hide the Import/Export service from the SWP, leave the **View** checkbox unselected. This is the default setting.

Figure 48-1 Role Configuration for Import/Export Access



Configuring the Import/Export Service

Before configuring the Import/Export Service, you must have the appropriate EMC Enterprise privileges assigned to you.

1. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **Import/Export** tab.
3. Enter the appropriate values in the fields. The following table describes the settings that you can configure for the Import/Export service.

Table 48-1 Import/Export Service Settings

Field	Description
Root Path for Export/Import File Operations	If you are using Simphony version 2.9.1 or later, this field is disabled. Do not enter information in this field.
Max No. of Records to Commit Per Batch	Enter the maximum number of records to commit per batch when importing. You can enter a value from 1000 through 20000. If you change the default value, restart the Oracle Hospitality Simphony Data Request Processing Service for the changes to take effect.
Import/Export API URL	If you are using an API, enter the IP address of the import/export API.
Simphony APP URL	Enter the IP address for the Simphony Web Portal: `https://[ServerName]/SimphonyApp`.
Default Date Time Format	Select the date and time format to use when processing import and export requests.

4. Click **Save**.

Configuring Task Schedules for Export Reliability

When upgrading Simphony, the Dbupgrade automatically creates two tasks for Export Reliability: one for Workstation (WS) and one for Check and Posting (C&P), but only if these tasks have never existed. The tasks are called 'Daily WS Export Reliability with recurrence' and 'Daily C&P Export Reliability with recurrence'. Default values are used for these tasks.

New organizations created after the upgrade require task schedules to be created manually. Schedules of an existing organization can be used as a template.

1. Select the Enterprise level, click **Configuration**, and then click **Task Schedules**.
2. Insert a new record for one of the following data export reliability tasks:
   - Daily WS Export Reliability with recurrence
   - Daily C&P Export Reliability with recurrence
3. Double-click the record to open it.
4. On the **General** tab, in the **Service Type** drop-down list, select one of the following, depending on the export reliability task created in Step 2:
   - **7 - Workstation**: Select this option for Daily WS Export Reliability with recurrence.
   - **8 - Check and Posting**: Select this option for Daily C&P Export Reliability with recurrence.
5. Select **7 - Export Reliability** as the **Task Type**.
6. The **Task Data** field must be blank. Changing important details of the scheduler (such as **Task Data**), results in the scheduler not running.
7. In the **Duration (seconds)** field, enter `120` seconds. This is the amount of time needed for the task to run.
8. Click the **Select** link adjacent to the **Time Zone** field. Select the correct time zone from the list, and then click **OK**.
9. In the **Schedule Type** drop-down list, select the frequency to run the export reliability tasks as **4 - Recurring - Daily**:
10. In the Duration section, click the **Enabled** check box, select a **Start date** of **1/1/2000** and select **No end date**.
11. Click the **Recurrence** tab.
12. In the Daily Frequency section, select **Occurs every**, and enter:
    - **45 minutes** starting at **00:05** and ending at **23:10** for the Workstation task.
    - **60 minutes** starting at **00:15** and ending at **23:20** for the Check and Posting task.
13. Click **Save**.
14. Repeat Steps 1 through 13 to create the other Data Export Reliability task schedule.

Increasing the Import File Size

Complete these steps if the Enterprise requires you to import files larger than the default 4MB size.

1. Browse to [Drive Letter]:\MICROS\Simphony2\SimphonyImportExport\WebApp\ and open the Web.config file.

2. Add the following line within a comment:

```
<httpRuntime targetFramework="4.5" />
```

3. Uncomment the following line:

```
<httpRuntime targetFramework="4.5" executionTimeout="240"
maxRequestLength="10243"/>
```

4. Enter the maximum import file size for the maxRequestLength parameter in Kilobits. By default, this value is set to 10 MB.
5. Save the changes.

Import/Export Service Components

The Simphony Import/Export Service is comprised of four components, plus a Microsoft Windows service. The following table lists the components and their capabilities.

Table 48-2 Simphony Data Import/Export Service Components

Component	Functionality
EGateway URL	Provides access to the Simphony configuration for self-hosted and Enterprise hosting center environments.
Web Service (REST API)	Assists developers with programmatic integration and the development of third-party application programming interfaces (API).
Web Service (SOAP API)	The SOAP API has the same functionality as the REST API, except this web service is constructed using the SOAP format rather than the REST format.
Simphony Web Portal (SWP)	This web application enables you to: • Import and export data manually • Download and store data securely in a database • Export data automatically using the scheduler • Review the status of completed import and export jobs • Access a Help page that provides additional database and API details The SWP is available for all users with Simphony EMC logon credentials.
Oracle Hospitality Simphony Data Request Processing Service (Microsoft Windows Service)	This Microsoft Windows service runs as part of throttling and scheduling processes (rather than on demand servicing requests).

49

Loyalty and Gift Card Interfaces and Drivers

Oracle Hospitality Gift and Loyalty is a customer relationship management (CRM) application that allows properties to manage point-based loyalty card programs and stored value cards (SVC) (also known as gift cards). Gift and Loyalty tracks customer activities (such as frequency of visits, spending, and loyalty account balance) and reports the information through Simphony's enterprise reporting module. Simphony then sends this information to Gift and Loyalty.

The following table lists common types of loyalty programs:

Table 49-1 Types of Loyalty Programs

Loyalty Program	Description
Points earned per transaction or per visit	An award given for X number of visits. The award could be a discount, coupon for future visit, or stored value added to the loyalty account for later redemption.
Points earned per dollar spent	An award given for X dollars spent. The award could be a discount, coupon for future visit, or stored value added to the loyalty account for later redemption.
Discount card	Each time the workstation operator swipes a card, the check receives an automatic discount. Restaurants typically use discount cards to control employee meal discounts.
Category club card	The customer earns points when ordering a specific type of menu item (for example, burgers).

A stored value program allows a guest to establish a prepaid account to use for purchases at a property. The prepaid payment vehicle is a stored value card with an associated monetary value. A gift card is an example of a stored value card containing a prepaid amount.

The Valutec command module plug-in is a custom loyalty and gift card host adapter that communicates between Simphony and the Valutec host. This command module incorporates the web service API provided by Valutec.

The Valutec command module plug-in is available starting with Simphony release 19.2.1. Valutec loyalty is not supported with devices running the Android mobile operating system.

Loyalty and Stored Value Configuration Prerequisites

Simphony supports the Gift and Loyalty drivers only on Microsoft Windows CE and Microsoft Windows 32-bit operating systems.

Complete the following tasks before configuring the Loyalty and Stored Value Interfaces and Drivers:

1. Install the latest Simphony release at the property.
2. Obtain access to the EMC within Simphony.

3. Configure unique Tender/Media and Discount records for loyalty transactions. Take note of the record number and type as you need the values to post transactions for Oracle Hospitality Reporting and Analytics and third-party loyalty applications.

   Reporting and Analytics and third-party loyalty applications use the configured Simphony Tender/Media and Discount records to post loyalty transactions to the guest check.

4. (Optional) If the property is using the XProcessor Extension Application for Gift and Loyalty, configure the Gift and Loyalty interface and XProcessor Extension Application at the Enterprise level. Deploy each interface only to the correct locations and clients. After you upgrade the appropriate clients to the latest Simphony release, see XProcessor Extension Application Migration for instructions.

   a. Leave the XProcessor installed at the Enterprise level until all clients have been upgraded to the latest Simphony release and are using the Gift and Loyalty interface.

   b. Retrieve the data extension overrides for each property (such as URL, userid, user_password, and timeout_seconds). Take note of these settings as you need this information to create the integrated Gift and Loyalty interface.

   c. Take note of the current functions the site uses through XProcessor. You need this information to create buttons for the Gift and Loyalty interface.

5. (Optional) If a third party developed a driver, use the driver configuration settings provided by the third party. Third-party drivers may have unique fields.

Configuring Valutec Installation Files

1. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers\Text.
2. Edit **VTLoyaltyCommandModule.dll.config** and **VTStoredValueCommandModule.dll.config** using a source code editor (for example, Notepad++).
3. Change the `<value>` tag to the URL of the live Valutec production web service.

   The following figure shows an example of the URL that you need to update.

Figure 49-1 Editing Valutec .config Files

```
<setting name="ValutecStoredValue_net_valutec_ws_ValutecWS"
        serializeAs="String">
        <value>http://ws.valutec.net/Valutec.asmx</value>
</setting>
```

4. Save your changes and close the VTLoyaltyCommandModule.dll.config and VTStoredValueCommandModule.dll.config files.

Loyalty Configuration Tasks

Complete the following tasks to set up the loyalty interface:

- Complete the configuration prerequisites
- Configure loyalty privileges

- Set loyalty options
- Configure the Loyalty driver
- Configure the Loyalty module
- Create Front of House loyalty buttons
- Allow workstation operators to void loyalty points issued on re-opened checks
- (If applicable) Migrate the XProcessor Extension Application

Configuring Loyalty and Stored Value Privileges

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Stored Value Cards** subtab.
3. Select the appropriate options for the privileges. The following table summarizes the privileges associated with Loyalty and Stored Value functionality.

Table 49-2 Loyalty and Stored Value Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Issue Functions	104	Authorize/Perform Issue Stored Value Function	Issue a stored value card
Issue Functions	105	Authorize/Perform Void Issue Stored Value Entry	Void an issued card
Issue Functions	106	Authorize/Perform Issue Stored Value Batch Function	Issue a batch of stored value cards
Issue Functions	107	Authorize/Perform Void Issue Stored Value Batch Entry	Void a batch of stored value cards
Issue Functions	108	Authorize/Perform Activate Stored Value Function	Activate a stored value card
Issue Functions	109	Authorize/Perform Void Activate Stored Value Entry	Void the activation of a stored value card
Issue Functions	110	Authorize/Perform Activate Stored Value Batch Function	Activate a batch of stored value cards
Issue Functions	111	Authorize/Perform Void Activate Stored Value Batch Entry	Void the activation of a batch of stored value cards
Reload and Redeem Functions	112	Authorize/Perform Reload Stored Value Function	Reload (add credit) a dollar amount to an existing stored value card
Reload and Redeem Functions	113	Authorize/Perform Void Reload Stored Value Entry	Void a reload transaction

Table 49-2 (Cont.) Loyalty and Stored Value Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Reload and Redeem Functions	114	Authorize/Perform Redeem Authorization Stored Value Function	Perform a redemption authorization
Reload and Redeem Functions	115	Authorize/Perform Void Redeem Authorization Stored Value Entry	Void a redemption authorization
Reload and Redeem Functions	116	Authorize/Perform Redeem Stored Value Function	Perform a redemption transaction (a customer makes a purchase using a stored value card, and the application deducts a dollar amount from the customer's account)
Reload and Redeem Functions	117	Authorize/Perform Void Redeem Stored Value Entry	Void a redemption transaction
Reload and Redeem Functions	118	Authorize/Perform Manual Redemption Stored Value Function	Perform a manual redemption
Reload and Redeem Functions	119	Authorize/Perform Void Manual Redemption Stored Value Entry	Void a manual redemption transaction
Point Functions	120	Authorize/Perform Issue Stored Value Points Function	Issue points to a stored value card
Point Functions	121	Authorize/Perform Void Issue Stored Value Points Entry	Void the issued points on a stored value card
Point Functions	122	Authorize/Perform Redeem Stored Value Points Function	Perform a points redemption transaction
Point Functions	123	Authorize/Perform Void Redeem Stored Value Points Entry	Void a points redemption transaction
Other Stored Value Card Options	103	Authorize/Perform Manual Entry of Stored Value Card Number	Manually enter the stored value card account number
Other Stored Value Card Options	124	Authorize/Perform Stored Value Cash Out Function	Debit some or all of the remaining balance on a stored value card
Other Stored Value Card Options	179	Authorize/Perform Void Stored Value Cash Out Function	Void a cash out transaction
Other Stored Value Card Options	125	Authorize/Perform Stored Value Balance Inquiry Function	Check a stored value card balance
Other Stored Value Card Options	126	Authorize/Perform Stored Value Balance Transfer Function	Transfer the balance from one stored value card to another

Table 49-2 (Cont.) Loyalty and Stored Value Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Other Stored Value Card Options	127	Authorize/Perform Stored Value Point Inquiry Function	Check a stored value card point balance
Other Stored Value Card Options	128	Authorize/Perform Stored Value Report Generation Function	Generate stored value card reports
Loyalty Options	166	Authorize/Perform Loyalty Coupon Inquiry	Request a list of coupons that are available for a loyalty account
Loyalty Options	167	Authorize/Perform Accept Loyalty Coupon Function	Redeem a coupon associated with a loyalty account
Loyalty Operations	168	Authorize/Perform Void Accept Loyalty Coupon Entry	Void the coupon redemption
Loyalty Operations	169	Authorize/Perform Issue Loyalty Coupon Function	Issue a coupon to a loyalty account
Loyalty Operations	170	Authorize/Perform Issue Loyalty Points Function	Issue points to a loyalty account
Loyalty Operations	171	Authorize/Perform Void Issue Loyalty Points Entry	Void the point issuance
Loyalty Operations	172	Authorize/Perform Redeem Loyalty Points Function	Accept or redeem points to apply towards the balance of a check
Loyalty Operations	173	Authorize/Perform Void Redeem Loyalty Points Entry	Void the points redemption
Loyalty Operations	174	Authorize/Perform Redeem and Issue Loyalty Points Function	Redeem points and issue additional points to a loyalty account
Loyalty Operations	175	Authorize/Perform Void Redeem and Issue Loyalty Points Entry	Void the points redemption and issuance
Loyalty Operations	176	Authorize/Perform Loyalty Balance Inquiry Function	Request a points balance for a loyalty account
Loyalty Operations	177	Authorize/Perform Loyalty Unique Item Inquiry Function	Request a list of unique menu items that were ordered on a program associated with a loyalty account
Loyalty Operations	178	Authorize/Perform Loyalty Balance Transfer Function	Transfer the points balance associated with one loyalty account number to another loyalty account

Table 49-2 (Cont.) Loyalty and Stored Value Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Loyalty Operations	180	Authorize/Perform Apply Loyalty Card to Check	Use the Oracle Hospitality Gift and Loyalty operation that applies a card account against the guest check. Depending on the configuration in Gift and Loyalty, setting this privilege could trigger one or more operations, such as redeem points, apply coupons, redeem a gift card, and issue points.

4. Click **Save**.

Setting Loyalty Options

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Loyalty**.
2. Insert a record, enter **Loyalty** as the name, and then click **OK**.
3. Double-click the record to open it.
4. Select the appropriate Loyalty Options as described in the following table.

Table 49-3 Loyalty Options

Option	Description
1 - Support Offline Transactions	Disable this option as loyalty transactions are not supported in offline mode.
2 - Always Print Loyalty Results	Enable this option to automatically print a chit after each successful loyalty operation. When enabled, upon finalizing a transaction, the message along with any POS Print Text configured for the transaction type automatically prints.
3 - Never Display Loyalty Results	Enable this option to require the workstation operator to touch the workstation in order to show loyalty results. When enabled, no message is generated. If the **2 - Always Print Loyalty Results** option is enabled, the loyalty results are printed.
5 - Remove Loyalty Results Print Button	Enable this option to hide the Print button from the loyalty results screen. When enabled, the generated message does not include the `Would you like to print? Yes or No` prompt. Enable this option in conjunction with the **2 - Always Print Loyalty Results** option.
6 - Remove Guest Name Lookup Button	Enable this option to hide the Guest Name Lookup button from the account number entry screen. This option deactivates the Guest Name Lookup function.

Table 49-3 (Cont.) Loyalty Options

Option	Description
7 - Remove Phone Number Lookup Button	Enable this option to hide the Phone Number Lookup button from the account number entry screen. This option deactivates the Phone Number Lookup function.

5. Click **Save**.

Configuring the Loyalty Driver

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Loyalty Driver**.
2. Insert a record and enter an appropriate gift and loyalty driver name.

   If you are using Valutec, you can name the driver record **VTLoyaltyDriver**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers, select **LoyaltyCommandModule.dll**, and then click **Open**.

   If you are using Valuetec, select **VTLoyaltyCommandModule.dll**, and then click **Open**.
6. Click the **Configuration** tab.
7. From the Assembly/Class section, enter information in the following fields:

Table 49-4 Assembly/Class Fields

Field	Description
Module ID	Enter the module identification (for example, LoyaltyDriver or VTLoyaltyDriver).
Display Name	Enter a name for the module (for example, Loyalty Driver or VTLoyaltyDriver).
Description	Enter a description for the module (for example, Loyalty Driver or VTLoyaltyDriver). Do not leave this field blank.

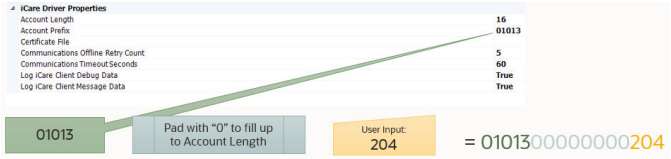
8. From the iCareDriver Properties section, enter information in the following fields:

   If you are using Valutec, skip to Step 9.

Table 49-5 iCareDriver Properties Fields

Field	Description
Account Length	Enter the number of digits for the loyalty account number.

Table 49-5 (Cont.) iCareDriver Properties Fields

Field	Description
Account Prefix	Enter the prefix for the account number. For example, if the card rule dictates that all account numbers start with 01013 and the **Account Length** is always 16, the following configuration allows you to enter the last digits (starting with the first non-zero digit), and the account number is concatenated as Prefix + padding zeroes + user input = where the number of padding zeroes ensures that the account length is correct. 
Allow Alphanumeric Account Number	When set to True, enables the ability to utilize a full alphanumeric keyboard in order to enter account number details.
Certificate File	If the property implemented a unique certificate file, specify the location of the certificate file on the local machine.
Communications Offline Retry Count	This value is the number of transactions that workstation operators can complete offline before attempting an online transaction. You cannot change the value in this field as it is based on the Tender Media or Service Charge records configured for offline use.
Communications Timeout Seconds	You cannot change the value in this field as it is based on the Tender Media or Service Charge records configured for offline use.
Log iCare Client Debug Data	If the client is using Gift and Loyalty, indicate whether the application includes debug information in the log file.
Log iCare Client Message Data	If the client is using Gift and Loyalty, indicate whether the application includes client messages in the log file.
Login	Leave this field blank at the Enterprise level. This value is set at the property level.
Password	Leave this field blank at the Enterprise level. This value is set at the property level.
Web Address	Enter the path to Gift and Loyalty, including location, port number and service path. Use the following format: https://[GiftLoyaltyLocation]:[GiftLoyaltyPortNumber]/ws/services/StoredValueService. If the property is using a third-party payment provider application (rather than Gift and Loyalty), enter the path to the third-party payment provider application. This can be a Web address or a local path.

9. (Valutec only) In the Valutec Driver Properties section, enter information in the following fields:

Table 49-6 Valutec Driver Properties Fields

Field	Description
Client Key	This value is provided by Valutec, and is used by the Valutec web service to identify the client.
Terminal ID	This value is provided by Valutec, and is used to identify each terminal initiating a transaction.
Merchant ID	This value is provided by Valutec, and is used to identify each merchant uniquely at the Valutec side. This number is used as an alternate number instead of the account number for loyalty operations.

10. Click **Save**.

Configuring the Loyalty Module

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Loyalty Module**.
2. Insert a record, enter **LoyaltyModule** as the name, and then click **OK**.

   If you are using Valutec, you can name the module record **VTLoyaltyModule**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers, select **LoyaltyCommandModule.dll**, and then click **Open**.

   If you are using Valuetec, select **VTLoyaltyCommandModule.dll**, and then click **Open**.
6. Click the **Configuration** tab.
7. In the Assembly/Class section, enter information in the following fields:
   - **Module ID**: Enter a value that identifies the module. For Valutec, enter `VTLoyaltyModule`.
   - **Display Name**: Enter a name for the module (for example, `Loyalty` or `VTLoyalty`).
   - **Description**: Enter a description of the loyalty module. Do not leave this field blank.
8. In the Common Properties section, enter information in the following fields:
   - **Currency ISO Code**: Enter the code (three alpha characters) that represents the currency being used (for example, USD).

     See http://www.currency-iso.org/en/home/tables/table-a1.html for a list of Currency ISO 4217 codes.
   - **Language ISO Code**: Enter the code (two alpha characters) that represents the language being used (for example, EN).

     See http://www.loc.gov/standards/iso639-2/php/code_list.php for a list of Language ISO 639-1 codes.

   If the currency or language is different at the property, override these values at the property level.
9. In the Loyalty Module Properties section, enter information in the following fields:
   - **Account Number Maximum Length**: Enter the maximum length of a loyalty account number (up to 24 digits).

- **Account Number Minimum Length**: Enter the minimum length of a loyalty account number (down to 7 digits).
- **Cash Module Name**: Enter the name of the cash module to use for redemptions (for example, Cash:Cash).

10. Click **Save**.
11. Select the property, click **Setup**, and then click **Loyalty Driver**.
12. Double-click the gift and loyalty driver record to open it.
13. Click the **Override This Record** link, and then click **Yes** to confirm.
14. Click the **Configuration** tab.
15. From the iCare Driver Properties section, enter information in the following fields:
    - **Login**: Enter the login for the property ID or the login for the provider.
    - **Password**: Enter the password for the property ID or the provider.
16. Click **Save**.

Stored Value Configuration Tasks

Complete the following tasks to set up the stored value interface:

- Carry out the configuration prerequisites
- Configure stored value privileges
- (Valutec only) Configure Valutec Gift Card Tender/Media Records
- (Valutec only) Configure Valutec Gift Card Service Charge Records
- Set stored value options
- Configure the Stored Value driver
- Configure the Stored Value module
- Create Front of House stored value buttons
- Allow workstation operators to void loyalty points issued on re-opened checks
- (If applicable) Migrate the XProcessor Extension Application

Setting Stored Value Options

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Stored Value**.
2. Insert a record, enter **Stored Value** as the name, and then click **OK**.
3. Double-click the record to open it.
4. Select the appropriate Stored Value Options. The following table describes the options.

Table 49-7 Stored Value Options

Option	Description
1 - Support Offline Transactions	For a single tenant environment, enable this option to allow offline stored value transactions. Stored value transactions are supported in offline mode only in single tenant environments.
2 - Always Print Stored Value Results	Enable this option to automatically print a chit after each successful stored value operation. When enabled, upon finalizing a transaction, the message along with any POS Print Text configured for the transaction type automatically prints.
3 - Never Display Stored Value Results	Enable this option to require the workstation operator to tap the workstation to show loyalty results. When enabled, no message is generated. If the **2 - Always Print Stored Value Results** option is enabled, the loyalty results are printed.
5 - Remove Stored Value Results Print Button	Enable this option to hide the Print button from the stored value results screen. When enabled, the generated message does not include the `Would you like to print? Yes or No` prompt. Enable this option in conjunction with the **2 - Always Print Stored Value Results** option.
6 - Remove Guest Name Lookup Button	Enable this option to hide the **Guest Name Lookup** button from the account number entry screen. This option deactivates the Guest Name Lookup function.
7 - Remove Phone Number Lookup Button	Enable this option to hide the **Phone Number Lookup** button from the account number entry screen. This option deactivates the Phone Number Lookup function.

5. Click **Save**.

Configuring the Stored Value Driver

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Stored Value Driver**.
2. Insert a record, enter an appropriate stored value card driver name, and then click **OK**.

   If you are using Valutec, you can name the driver record **VTStoredValueDriver**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers, select **StoredValueCommandModule.dll**, and then click **Open**.

   If you are using Valuetec, select **VTStoredValueCommandModule.dll**, and then click **Open**.
6. Click the **Configuration** tab.

7. From the Assembly/Class section, enter information in the following fields:

Table 49-8 Assembly/Class Fields

Field	Description
Module ID	Enter a value that identifies the module (for example, `SVCDriver`).
Display Name	Enter a name for the module (for example, `SVCDriver` or `VTStoredValueDriver`).
Description	Enter a description of the module (for example, `SVC Driver`). Do not leave this field blank.

8. In the iCareDriver Properties section, enter information in the following fields:

If you are using Valutec, skip to Step 9.

Table 49-9 iCareDriver Properties Fields

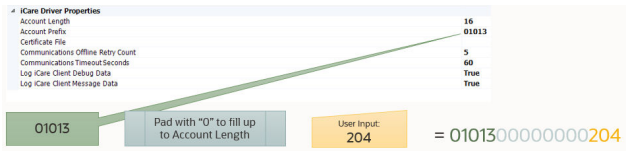
Field	Description
Account Length	Enter the number of digits for the loyalty account number.
Account Prefix	Enter the prefix for the account number. For example, if the card rule dictates that all account numbers start with 01013 and the **Account Length** is always 16, the following configuration allows you to enter the last digits (starting with the first non-zero digit), and the account number is concatenated as Prefix + padding zeroes + user input = where the number of padding zeroes ensures that the account length is correct. 
Allow Alphanumeric Account Number	When set to True, enables the ability to utilize a full alphanumeric keyboard in order to enter account number details.
Allow Zero Value	When set to True, enables the ability to charge a zero-value check to Gift and Loyalty.
Certificate File	If the property implemented a unique certificate file, enter the location of the certificate file on the local machine.
Communications Offline Retry Count	This value is the number of transactions that workstation operators can complete offline before attempting an online transaction. You cannot change the value in this field as it is based on the Tender Media or Service Charge records configured for offline use.

Table 49-9 (Cont.) iCareDriver Properties Fields

Field	Description
Communications Timeout Seconds	You cannot change the value in this field as it is based on the Tender Media or Service Charge records configured for offline use.
Log iCare Client Debug Data	If the client is using Gift and Loyalty, indicate whether the application includes debug information in the log file.
Log iCare Client Message Data	If the client is using Gift and Loyalty, indicate whether the application includes client messages in the log file.
Login	Leave this field blank at the Enterprise level. This value is set at the property level.
Password	Leave this field blank at the Enterprise level. This value is set at the property level.
Web Address	Enter the path to Gift and Loyalty, including location, port number and service path. Use the following format: https:// [GiftLoyaltyLocation]: [GiftLoyaltyPortNumber]/ws/services/ StoredValueService. If the property is using a third-party payment provider application (rather than Gift and Loyalty), enter the path to the third-party payment provider application. This can be a Web address or a local path.

9. (Valutec only) In the Valutec Driver Properties section, enter information in the following fields:

Table 49-10 Valutec Driver Properties Fields

Field	Description
Client Key	This value is provided by Valutec, and is used by the Valutec web service to identify the client.
Terminal ID	This value is provided by Valutec, and is used to identify each terminal initiating a transaction.
Merchant ID	This value is provided by Valutec, and is used to identify each merchant uniquely at the Valutec side. This number is used as an alternate number instead of the account number for stored value operations.

10. (Valutec only) In the Valutec Stored Value Card Properties section, enter information in the following fields:

You need to configure tenders and service charges first to get the object numbers needed for entry in the following fields.

Table 49-11 Valutec Stored Value Card Properties Fields

Field	Description
Activate Tender	Enter the object number of either a service charge or a menu item number used for the activate tender operation.

Table 49-11 (Cont.) Valutec Stored Value Card Properties Fields

Field	Description
Cashout Tender	Enter the object number of the cashout tender used for the pickup tender or loan tender operation.
Offline Redeem Tender	Enter the object number of the offline redeem tender used for redemption in offline mode only.
Offline Redeem Tender Limit	Enter the offline redemption tender limit amount. This is the maximum amount on the check that is allowed while the POS client is in offline mode.
Redeem Tender	Enter the object number of the tender used for the redeem operation.
Reload Tender	Enter the object number of the tender used for either a service charge or menu item used for the reload operation.

11. Click **Save**.

Configuring the Stored Value Module

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Stored Value Module**.
2. Insert a record, enter **SVCModule** as the name, and then click **OK**.

   If you are using Valutec, you can name the module record **VTStoredValueModule**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\MICROS\Simphony2\EgatewayService\handlers, select **StoredValueCommandModule.dll**, and then click **Open**.

   If you are using Valuetec, select **VTStoredValueCommandModule.dll**, and then click **Open**.
6. Click the **Configuration** tab.
7. In the Assembly/Class section, enter information in the following fields:
   - **Module ID**: Enter the module identification. For Valutec, enter `VTStoredValueModule`.
   - **Display Name**: Enter a name for the module (for example, `Stored Value` or `VTStoredValue`).
   - **Description**: Enter a description of the stored value module. Do not leave this field blank.
8. In the Common Properties section, enter information in the following fields:
   - **Currency ISO Code**: Enter the code (three alpha characters) that represents the currency being used (for example, USD).

     See www.currency-iso.org/en/home/tables/table-a1.html for a list of Currency ISO 4217 codes.
   - **Language ISO Code**: Enter the code (two alpha characters) that represents the language being used (for example, EN).

     See www.loc.gov/standards/iso639-2/php/code_list.php for a list of Language ISO 639–1 codes.

If the currency or language is different at the property, override these values at the property level.

9. In the Stored Value Module Properties section, enter information in the following fields:
   - **Account Number Maximum Length**: Enter the maximum length of a stored value account number (up to 24 digits).
   - **Account Number Minimum Length**: Enter the minimum length of a stored value account number (down to 7 digits).
   - **Cash Module Name**: Enter the name of the cash module to use for redemptions (for example, Cash:Cash).
   - **Max Card Activation Quantity**: Enter the maximum number of stored value cards that can be activated with the Activate Multiple card operation.
   - **Max Card Issue Quantity**

     : Enter the maximum number of stored value cards that can be issued with the Activate Multiple card operation.
10. Click **Save**.
11. Select the property, click **Setup**, and then click **Stored Value Driver**.
12. Double-click the stored value card driver record to open it.
13. Click the **Override This Record** link, and then click **Yes** to confirm.
14. Click the **Configuration** tab.
15. From the iCare Driver Properties section, enter information in the following fields:
    - **Login**: Enter the login for the property ID or the login for the provider.
    - **Password**: Enter the password for the property ID or the provider.
16. Click **Save**.

Creating Loyalty and Stored Value Buttons

You can create buttons for use on a POS Operations page for the loyalty and stored value functions.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place loyalty and stored value buttons.
3. On the **Edit** tab, select the page area in which to define the loyalty and stored value functions (typically the payment or function area).
4. Click **Button**.
5. On the **General** subtab, select the appropriate function from the **Type** drop-down list.
   - **Loyalty Function**
   - **Stored Value Function**
6. Click the black arrow beneath the **Type** drop-down list.
7. Select one of the following, and then click **OK**.
   - **iCare Loyalty**: Select for Oracle MICROS Simphony loyalty.
   - **iCare Stored Value**: Select for Oracle MICROS Simphony gift cards.

- **Loyalty**: Select for Valutec loyalty.
- **Stored Value**: Select for Valutec gift cards.

8. From the Loyalty or Stored Value Operation Selection dialog, select the appropriate **Module Type** and **Functions**, and then click **OK**.
   - **iCareLoyaltyModule**: Select for Oracle MICROS Simphony loyalty.
   - **iCareSVCModule**: Select for Oracle MICROS Simphony gift cards.
   - **VTLoyaltyModule**: Select for Valutec loyalty.
   - **VTStoredValueModule**: Select for Valutec gift cards.
9. Position and size the button on the page. Use the Style arrow to change the color.
10. In the **Legend** field, enter the button name, and then click **Save**. The following tables list the loyalty and stored value button names and functions.

    Buttons marked with an asterisk (*) are only available with Gift and Loyalty; these functions are not available with third-party payment providers.

Table 49-12 Loyalty Buttons

Button Name	Function
Balance Inquiry	Request a points balance for a loyalty account.
Unique Items Inquiry*	Request a list of unique menu items that have been ordered on a program associated with a loyalty account.
Issue Points	Issue points to a loyalty account.
Coupon Inquiry	Request a list of coupons that are available for a loyalty account.
Redeem Coupon	Redeem a coupon to apply towards the balance of a guest check.
Issue Coupon	Issue an ad hoc coupon from Gift and Loyalty to a guest loyalty account.
Transfer Loyalty Account	Transfer the points balance and customer personal information associated with one loyalty account number to another loyalty account.

Table 49-12 (Cont.) Loyalty Buttons

Button Name	Function
Apply Card to Check*	The Apply Card to Check function sends an Apply request to Gift and Loyalty for the account number. Based on Gift and Loyalty configuration, the workstation operator can select the following actions: • Apply Coupon • Redeem Points • Redeem Stored Value Card (SVC) • Apply Coupon and Redeem SVC • Issue Points The Apply Card to Check function requires a special configuration to share data between the Loyalty and Stored Value modules. To configure the **Apply Card to Check** button on the **General** tab, in the **Text** field, enter the **SVCModule Name** and **Record Number**. Use the format SVCModuleName:RecordNumber to process SVC actions associated with this function. You can find the Record Number and Module Name in EMC by highlighting the Enterprise, selecting **Setup**, and then clicking **Stored Value Module**. A property can load more than one type of loyalty module, although Oracle does not recommend doing so. If the property uses multiple loyalty modules, manually enter the module name in the Arguments field for the second module.

Table 49-13 Stored Value Buttons

Button Name	Function
Balance Inquiry	Request the current monetary value for a stored value account or gift card.
Issue SVC	Issue one stored value account number for a dollar value that is determined at the time of purchase.
Issue Multiple SVCs*	Issue multiple stored value account numbers for a dollar value that is determined at the time of purchase.
Activate SVC	Activate one stored value account. The application prompts the workstation operator to enter the pre-defined dollar value for validation.
Activate Multiple SVCs*	Activate multiple stored value account numbers for a dollar value that is determined at the time of purchase. The application prompts the workstation operator to enter the pre-defined dollar value for validation.
Reload	Add funds to an existing stored value account.
Transfer	Transfer the funds and customer personal information (if applicable) associated with one stored value account to another stored value account.
Authorize	Authorize a gift card for use as payment on a guest check.
Redeem	Pay a guest check balance using a gift card.
Cash Out	Obtain a cash payment for any remaining balance on a stored value account.

Table 49-13 (Cont.) Stored Value Buttons

Button Name	Function
Redeem SVC/Issue Points*	The Redeem SVC/Issue Points function combines the Redeem SVC and Loyalty Issue Points functions. The application prompts the workstation operator to redeem a gift card, and then automatically issues points. The Redeem SVC/Issue Points function requires a special configuration to share data between the Loyalty and Stored Value modules. To configure the **Redeem SVC/Issue Points** button on the **General** tab, in the **Text** field, enter the **LoyaltyModule Name** and **Record Number**. Use the format LoyaltyModuleName:RecordNumber to process loyalty actions associated with this function. You can find the Record Number and Module Name in EMC by highlighting the Enterprise level, clicking **Setup**, and then clicking **Loyalty Module**. For SVC transactions, you can suppress a prompt for entry of the Total Amount Due by enabling Tender/Media option **3 - Assume Paid in Full**, and by setting the **Text** field of the **Redeem** button in the Page Design module to: **RedeemAmountIsTotalDue**. A property can load more than one type of stored value module, although Oracle does not recommend doing so. If the property uses multiple stored value modules, manually enter the module name in the Arguments field for the second module.

11. Repeat the preceding steps to create buttons for each of the loyalty and stored value functions listed in the tables.

Voiding Points on a Re-opened Check

To allow workstation operators to void loyalty points issued on re-opened guest checks, the check number must remain the same after reopening a check. By default, a guest check number increments each time a workstation operator re-opens the check, preventing the voiding of points due to check numbering mismatch.

1. Select the revenue center, click **RVC Parameters**, and then click **Options**.
2. Select **37 - Keep The Same Check Number When a Check is Reopened**.

   This allows a re-opened guest check to retain its original guest check number. When you deselect this option, Simphony assigns a re-opened guest check to a new check number.
3. Click **Save**.

XProcessor Extension Application Migration

You can install the Loyalty driver for Gift and Loyalty Advanced at the property (in place of the XProcessor Extension Application). Upgrade the POS clients to the latest Simphony release before completing the steps in this section.

1. Browse to the CAL server's Microsoft Windows 32-bit or Microsoft Windows CE subdirectory for Gift and Loyalty Advanced:
   - CAL\Win32\ICareProcessor2.0 directory
   - CAL\WinCE\ICareProcessor2.0 directory

2. Delete the ICareProcessor2.0 directory.
3. From the EMC, select the Enterprise level, click **Setup**, and then click **CAL Packages**.
4. Delete the CAL Client package that was used to deploy the ICareProcessor2.0 directory to the workstations.
5. Delete the following files from the disk:
   - Micros.XProcessor.dll
   - Micros.XProcessor.SVC.dll
   - Micros.XProcessor.SVC.ICare.dll
6. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Extension Application**.
7. Delete the Extension Application for XProcessor.
8. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Payments**.
9. Delete the XProcessor Payment driver.
10. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
11. Delete XProcessor Close Check.
12. Delete the iCareSvcProcessor.icare.xml file.
13. Select the Enterprise level, click **Configuration**, and then click **Data Extensions**.
14. Delete the data extensions for each property.
15. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
16. Double-click the page record containing Gift and Loyalty buttons to open it.
17. Delete all Gift and Loyalty buttons.

    Depending on the property's Gift and Loyalty configuration, additional menu items, discounts, service charges, or tenders may have been used. If these items are in use, leave these additional items and do not delete them.
18. If the property was using the Check Reprocessor service, remove the installed check reprocessor files from the Enterprise Service Host as the Gift and Loyalty interface has its own plug-ins.
19. Browse to the Handlers directory where the Check Reprocessor ran and open the ChkReprocSvcHost.DLL.config file.
20. Delete the following tag:

    ```
    <pluginAssembly displayname="XProcessor Reprocessor"
    fullname="Micros.XProcessor.SVC.dll, Version=0.0.0.0, Culture=neutral,
    PublicKeyToken=null" />
    ```

    Leave the tags `<pluginAssemblies>` and `</pluginAssemblies>`.
21. Delete the following files from the Handlers directory:
    - Micros.Ops.Extensibility.dll
    - Micros.XProcessor.dll
    - Micros.XProcessor.SVC.dll
    - Micros.XProcessor.SVC.iCare.dll

50
XProcessor Gift Cards and Plug-ins

The XProcessor is an Extension Application which provides a framework for implementing processors in EMC. These processors are used to interact with external gift card/stored value card provider systems.

The following XProcessor plug-ins are available:

- Generic SVC - Givex Processor
- Stored Value Solutions (SVS) Processor
- ValueLink Processor

The subsequent topics in this chapter explain the XProcessor framework, and how to configure and use each processor plug-in.

Setting Up the XProcessor Framework

To use XProcessor, you need to set up the main XProcessor framework and one or more processor plug-ins.

The XProcessor plug-ins are:

1. Generic SVC - Givex Processor
2. SVS Processor
3. ValueLink Processor

The following files must be imported into the Simphony EMC to set up the XProcessor framework:

- **Micros.XProcessor.Payment.dll**: To be imported into the Payments module
- **XProcessorConfiguration_initial.xml**: To be imported into the Content module

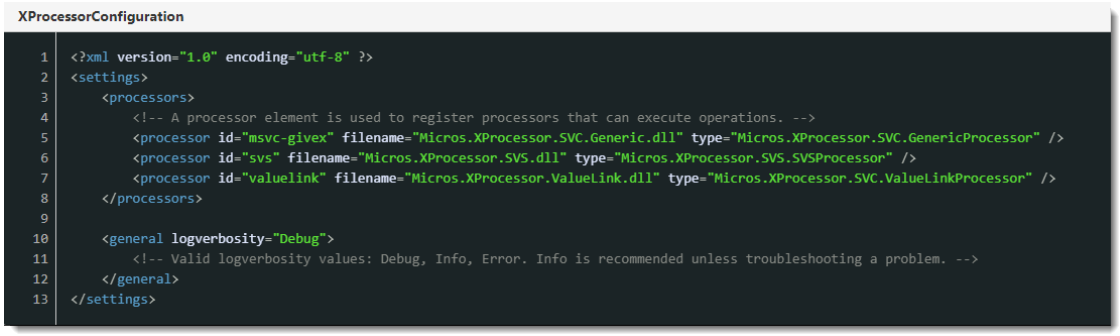
Subsequent topics provide instructions about importing these two files (and each available plug-in) into the Simphony system.

Setting up Multiple Processors

Setting up multiple processors in the same system can be done, but has its limitations. More specifically, the order in which you define the individual processors in the main XProcessor configuration file matters. If you define all three processors, the first processor defined in the configuration file, which handles a specific operation, is the one that is used for the operation.

With the configuration shown here, the Generic SVC Processor is defined/listed first. Attempting to perform a **Redeem** function, which is common to all three processors, will be handled by the Generic SVC Processor, even if your intention is to use the SVS Processor.

Figure 50-1 XProcessor Plug-ins



> **Note:**
>
> This limitation does not apply to the ValueLink processor plug-in as the ValueLink buttons are configured to use a different entry point.

See Add XProcessor Payment DLL to the Payments Module and Add XProcessor Configuration File to the Content Module for information about configuring the XProcessor framework.

Add XProcessor Payment DLL to the Payments Module

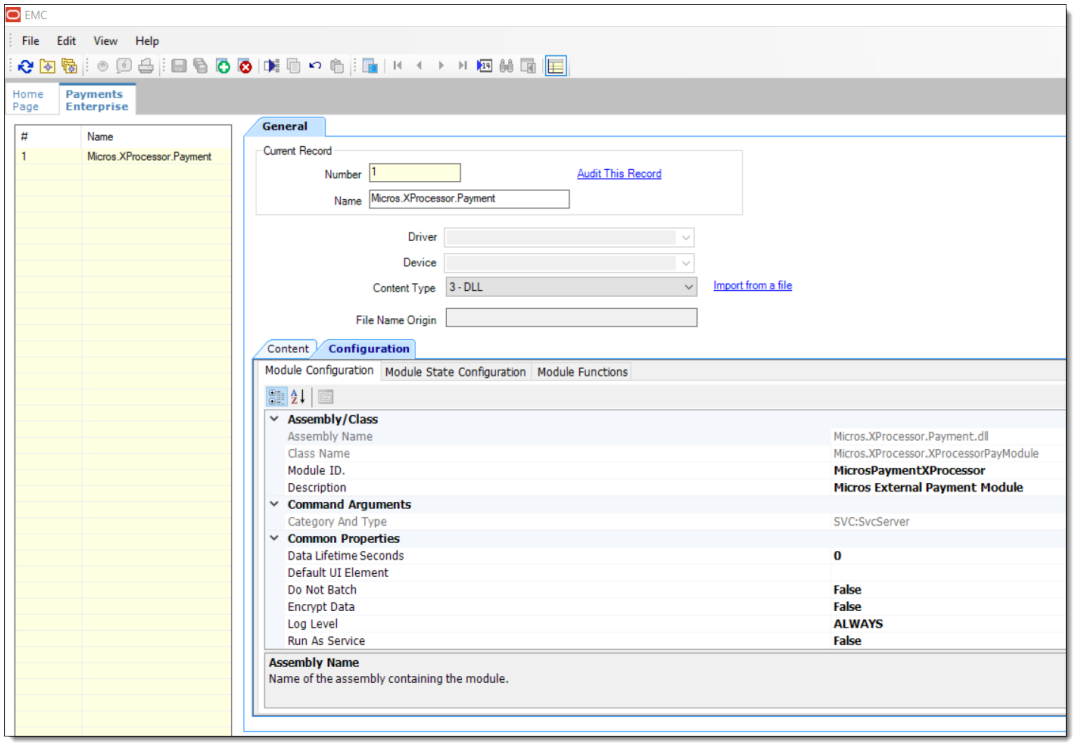
The setup steps provided here also apply to remote EMC users. All required installation files are available in the `[Drive Letter]:\MICROS\Simphony2\EMCClient` folder on the Simphony application server.

These steps are the same for each available XProcessor plug-in. To set up the EMC Payments module for the XProcessor framework:

1. Select the Enterprise level, click **Setup**, and then click **Payments**.
2. Insert a new record, and then double-click the new record to open it in form view.
3. In the **Name** field, enter **Micros.XProcessor.Payment**.

   When configuring all XProcessor files in the EMC, the naming conventions for the *.DLL and *.XML files must match the actual file name that is imported into the module, but is not to include the file's extension, for example *.dll or *.xml.
4. In the **Content Type** field, select **3 - DLL** from the drop-down list.
5. Click the **Import from a file** link.
6. From the **EMCClient** folder, select the **Micros.XProcessor.Payment.dll** file.

Figure 50-2 EMC Payments Module



7. Click **Save**.
8. Continue to Add XProcessor Configuration File to the Content Module.

Add XProcessor Configuration File to the Content Module

The setup steps provided here also apply to remote EMC users. All required installation files are available in the **EMCClient** folder on the Simphony application server.

The setup steps outlined here are the same for each available XProcessor plug-in. To setup the Content module for the XProcessor framework:

1. Access the EMC and select the **Enterprise**, click **Setup**, and then select **Content**.
2. Insert a new record and double-click the new record to toggle to Form view.
3. From the **Name** field, enter **XProcessorConfiguration**.

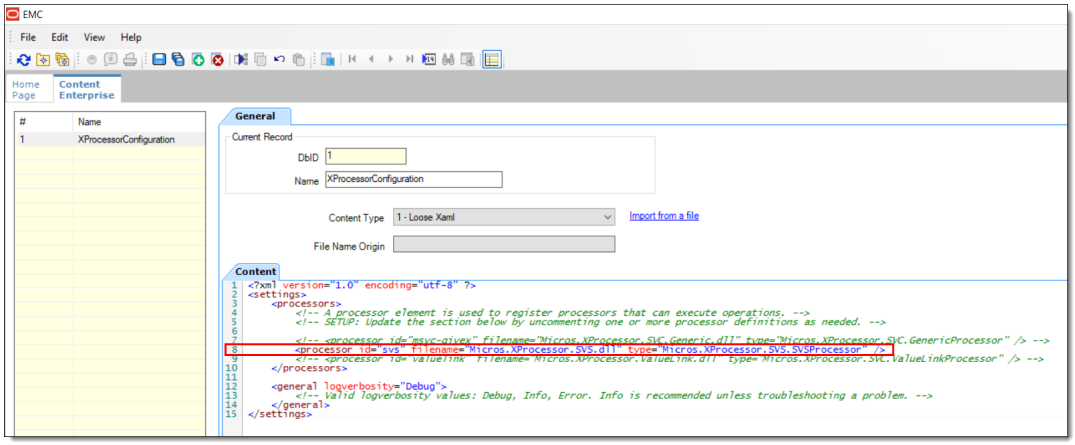
> **Note:**
>
> When configuring all XProcessor files in the EMC, the naming conventions for the *.DLL and *.XML files must match the actual file name which is imported into the module, but is not to include the file's extension, for example *.dll or *.xml.

4. From the **Content Type** field, select **1 – Loose Xaml** from the drop-down list.
5. Click the **Import from a file** link.
6. From the **EMCClient** folder, select the **XProcessorConfiguration_initial.xml** file.

7. Depending on how many XProcessor plug-ins you plan to use, you can either leave unused plug-in(s) as they are (commented out), or remove the unused plug-in rows altogether.

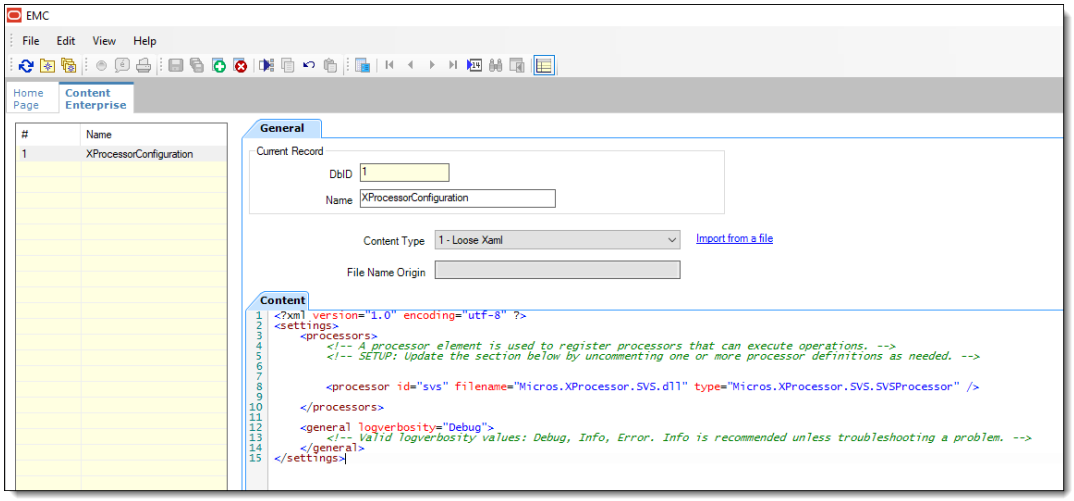
   In this example, only the SVS XProcessor plug-in has been un-commented and is accessible for use by the system.

Figure 50-3 Example: EMC Content Module - Un-Commented Out XProcessor Plug-In Row



In this example, the MSVC-Givex – SVC Generic and ValueLink XProcessor plug-in rows have been removed altogether.

Figure 50-4 Example: EMC Content Module - Removed Unused XProcessor Plug-Ins Rows



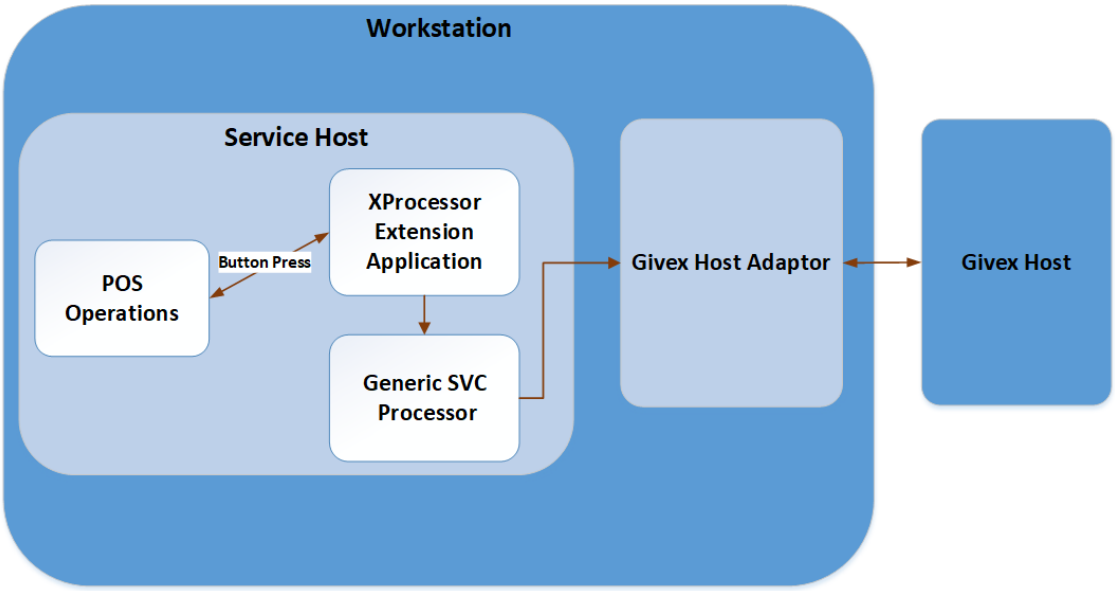
8. Click **Save**.

Givex Processor

The Generic Stored Value Card (SVC) Processor is an extension to the XProcessor Extension Application. It provides access to any gift card vendor that supports the Oracle MICROS SVC

Host Message Specification. The processor communicates with a vendor host adapter, which then communicates with the vendor's host system using a vendor-specific protocol. Givex is currently the only vendor that uses this specification.

Figure 50-5 Generic SVC/Givex Processor Data Flow



Setting up the Givex Processor consists of downloading and installing a vendor host adapter/driver to a workstation, and adding or modifying records in the following EMC modules:

- Content
- Discounts
- Page Design
- Service Charges
- Tender/Media

If you are an existing Givex customer, you can continue using your Givex Processor configuration, but you must be using the latest release package, which is Version 2.2.5.122.

Configuring the Givex Tender/Media Record

You must configure six tenders for use with the Givex Processor. The tenders are:

- Gift Card Redeem
- Cash Back
- Points Issue
- Pre Auth
- Promotion Card Redeem
- Ticket Redeem

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.

2. Insert a record, name it **Givex Gift Card Redeem**, and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Click **Save**.
6. Repeat steps 2 through 5 for the remaining tenders, following a similar naming convention (for example, Givex [TENDER/MEDIA NAME]).

Configuring the Givex Service Charge Record

You must configure four service charges for use with the Givex Processor. The service charges are:

- Register
- Increment
- Activate
- Points Redeem

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
2. Insert a record, name it **Givex Register Charge**, and then click **OK**.
3. Double-click the record to open it.
4. Select option **14 - Service Charge Used For Stored Value Transactions**.
5. Set other Service Charge fields and options as needed. Configuring Service Charges contains more information about the fields and options.
6. Click **Save**.
7. Repeat steps 2 through 6 for the remaining service charges, following a similar naming convention (for example, Givex [SERVICE CHARGE NAME] Charge).

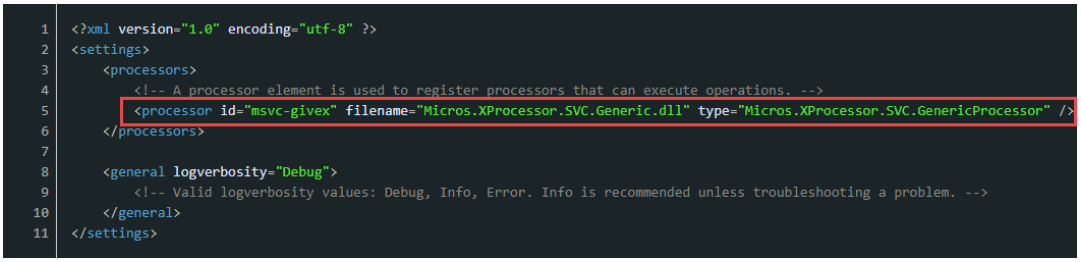
Configuring the Givex Processor and Content Files

Before configuring the Givex Processor, you must ensure that the XProcessor Extension Application is installed and configured. Setting Up the XProcessor Framework contains more information.

The instructions in this topic explain how to add the GenericSvcProcessor.msvc-givex.xml file to the Content module in the EMC. This file contains Generic SVC processor configuration for Givex.

1. Select the Enterprise level, click **Setup**, and then click **Content**.
2. Double-click the **XProcessorConfiguration** row in the **Name** column.
3. Locate the `processor id="msvc-givex"` entry. This file includes an entry for the Givex Generic SVC Processor as shown in the following figure:

Figure 50-6 XProcessor Configuration Entry for Givex



If you are using only the Givex Processor for gift card service, delete the other entries or use comment marks around them.

4. Click the insert icon



on the toolbar.

5. In the **Record Name** field, enter **GenericSvcProcessor.msvc-givex**, and then click **OK**.

   Ensure that you enter the filename exactly as shown; otherwise problems may occur in the system. Do not include the file extension (in this case, *.xml) in the **Record Name** field.

6. Double-click the **GenericSvcProcessor.msvc-givex** row.
7. Set the **Content Type** to **1 - Loose Xaml** so you can see the tags in various colors, making it easier to read.
8. Click the **Import from a file** link.
9. Browse to `[Drive Letter]:\MICROS\Simphony2\EMCClient`, select **GenericSvcProcessor.msvc-givex.xml**, and then click **Open**.
10. Change the **GenericSvcProcessor.msvc-givex.xml** file to include the appropriate entries, replacing the tags in braces with the correct information.

    The comments in the file explain in further detail. For more information, see Configuring the Givex Processor Address and Port.

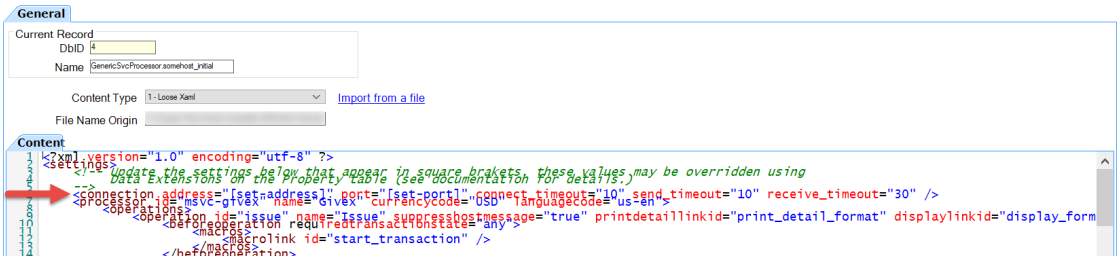
11. Click **Save**.
12. Update or reload your database on the workstation to ensure that the changes apply to the workstation.

    Updating Workstations After Configuration Changes in the *Oracle MICROS Simphony POS User Guide* contains information about this process.

Configuring the Givex Processor Address and Port

One of the settings for the Givex Processor configuration file is the address and port used for the TCP socket connection to the vendor's host adaptor. The values can vary by installation or, in some cases, by location. As such, these values require updating when importing the Givex processor configuration file in the Content module of EMC. The following figure indicates where to configure these settings.

Figure 50-7 Givex Processor XML File – Updating Address and Port



In the **address** section, set the IP address of the workstation that is running the Givex host adaptor, and in the **port** section enter the port number for the Givex host adaptor (this is the listener port). By default the port number for the Givex adaptor is 50000, however this may vary and is configurable.

Creating Givex Processor Operations Buttons

You need to add a button to POS operations for each supported Givex Processor operation to function on the workstation. Each button needs to be set to the Function **Run Extensibility App**.

The following tables list the operations supported by the Givex Processor and the arguments that are used in the Page Design module. The first table lists button arguments that support account numbers less than 9,223,372,036,854,775,807. Customer sites with account numbers greater than this number must use the button arguments listed in the second table. You will use the information from these tables in the subsequent steps.

Table 50-1 Givex Operation Buttons — Original

Operation Name	Description	Argument String
Authorize	Authorize the use of a gift card for payment. This function is used in conjunction with Finalize.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Authorize;Arg=<XProcessorArgs transactionstate="inside" />
Balance Transfer	Transfer the balance of one card to another. The source card effectively becomes inactive.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=BalanceTransfer;Arg=<XProcessorArgs transactionstate="outside"><AccountEntryRules title="Givex Balance Transfer" prompt="Enter Account Number to Transfer Balance To" entrytype="Numeric" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></XProcessorArgs>
Cash Out	Remove the remaining balance of the gift card.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Cashout;Arg=<XProcessorArgs transactionstate="outside" />

Table 50-1 (Cont.) Givex Operation Buttons — Original

Operation Name	Description	Argument String
Finalize	Finalize the gift card payment. This function is used in conjunction with Authorize.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Finalize;Arg=<XProcessorArgs suppressaccountprompt="true" selectpendingoperation="true" transactionstate="inside"/>
Inquire	Retrieve the current balance of a gift card.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Inquire
Issue	Generate a new card number with the requested balance.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Issue;Arg=<XProcessorArgs processorid="msvc-givex" suppressaccountprompt="true" />
Redeem	Use the gift card as payment.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Redeem;Arg=<XProcessorArgs transactionstate="inside" />
Reload	Givex cards are activated by the Reload operation. Add value to an active gift card via a payment.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Reload
Void Cash Out	Reverse a previously performed cash out operation.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=void_cashout;Arg=<XProcessorArgs transactionstate="outside" />

Table 50-2 Givex Operation Buttons — Supports 19+ Digit Account Numbers

Operation Name	Description	Argument String
Authorize	Authorize the use of a gift card for payment. This function is used in conjunction with Finalize.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Authorize;Arg=<XProcessorArgs transactionstate="inside"><AccountEntryRules title="Authorize" prompt="Enter Account Number" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></XProcessorArgs>

Table 50-2 (Cont.) Givex Operation Buttons — Supports 19+ Digit Account Numbers

Operation Name	Description	Argument String
Balance Transfer	Transfer the balance of one card to another. The source card effectively becomes inactive.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=B alanceTransfer;Arg=<XProcessorArgs transactionstate="outside"><AccountE ntryRules title="Givex Balance Transfer" prompt="Enter Account Number to Transfer Balance To" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></ XProcessorArgs>
Cash Out	Remove the remaining balance of the gift card.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=C ashout;Arg=<XProcessorArgs transactionstate="outside"><AccountE ntryRules title="Cashout" prompt="Enter Account Number" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></ XProcessorArgs>
Finalize	Finalize the gift card payment. This function is used in conjunction with Authorize.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=Fi nalize;Arg=<XProcessorArgs suppressaccountprompt="true" selectpendingoperation="true" transactionstate="inside"/>
Inquire	Retrieve the current balance of a gift card.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=In quire;Arg=<XProcessorArgs><Account EntryRules title="Inquire" prompt="Enter Account Number" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></ XProcessorArgs>
Issue	Generate a new card number with the requested balance.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=Is sue;Arg=<XProcessorArgs processorid ="msvc-givex" suppressaccountprompt="true" />

Table 50-2 (Cont.) Givex Operation Buttons — Supports 19+ Digit Account Numbers

Operation Name	Description	Argument String
Redeem	Use the gift card as payment.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=R edeem;Arg=<XProcessorArgs transactionstate="inside"><AccountEn tryRules title="Redeem" prompt="Enter Account Number" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></ XProcessorArgs>
Reload	Givex cards are activated by the Reload operation. Add value to an active gift card via a payment.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=R eload;Arg=<XProcessorArgs><Account EntryRules title="Reload" prompt="Enter Account Number" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></ XProcessorArgs>
Void Cash Out	Reverse a previously performed cash out operation.	Type=DLL;AppName=XProcessor;File Name=Micros.XProcessor.dll;Script=v oid_cashout;Arg=<XProcessorArgs transactionstate="outside"><AccountE ntryRules title="Void Cashout" prompt="Enter Account Number" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false" /></ XProcessorArgs>

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Givex Processor buttons.
3. On the **Edit** tab, select the page area in which to define the Generic SVC Processor functions.
4. Click **Button**.
5. On the **General** subtab, in the **Legend** field, enter the operation name (button).
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow beneath the **Type** drop-down list.

8. Select **Extensibility** from the **Type** pane, select **Run Extensibility App** in the **Results** pane, and then click **OK**.
9. Click inside the **Arguments** field (left of the black arrow). The easiest way to complete this field for each operation name is to copy and paste the information from the table in the Arguments String field.

   Ensure that there are no spaces within the string.
10. Repeat steps 4 through 9 to create buttons for each of the operations listed in the table.
11. Click **Save**.

Givex Host Adaptor

Due to the Givex Processor requiring communication with a vendor host adaptor (which in turn communicates with the vendor's host system using a vendor-specific protocol), you need to download and install the host adaptor to a workstation.

Givex is Windows-based, and as such, runs as a Windows service on workstations.

For more information on how to download and install Givex to a workstation, contact your Givex representative for assistance.

The Givex Host Adaptor has its own configuration file called **GIVEX.INI**, which requires modification in the following areas:

- Connection information for the Givex host.
- Record numbers to map to Givex Transactions, specifically:
  - **INVENTORY_BASE** relates 4 transactions to Service Charge entries.
  - **TENDER_BASE** relates 6 transactions to Tender/Media.

After modifying the configuration file, restart the Givex Host Adaptor service. The name of the service is **Givex SVC Adaptor**.

For more detailed information on how to configure the Givex Host Adaptor, see Configuring the Givex Host Adaptor.

Configuring the Givex Host Adaptor

The following steps describe how to configure the Givex Host Adaptor after downloading and installing it to a workstation. For more information on how to download and install the adaptor file, contact your Givex representative for assistance.

1. Download and install the provided Givex Host Adaptor file to your workstation. Make sure to run the file as an administrator to avoid any issues.
2. After installation, browse to `[Drive Letter]:\Program Files\MicrosGivex`, and then open the **GIVEX.INI** file in Notepad or Notepad++.
3. Edit the following areas in the file:
   a. (Optional) **LISTEN_PORT**: By default, the value is set to **50000**. You may edit this port number if you wish to use a different port, due to possible restrictions.
   b. **INVENTORY_BASE**: This setting controls the mapping of Givex transactions to Oracle MICROS Service Charges. Each of the four Givex transactions that require configuration correspond to a Service Charge:
      - Register (Givex service 904)

- Increment (Givex service 905)
- Activate (Givex service 906)
- Points Redeem (Givex service 912)

Set the **INVENTORY_BASE** to equal the corresponding Service Charge record numbers in the EMC, For example, if the Givex Service Charge record numbers set in the EMC are listed as **2, 3, 4, 5**, then set it as **INVENTORY_BASE = 2, 3, 4, 5**. The configuration file provides comments that explain the process in further detail for other examples.

c. **TENDER_BASE**: This setting controls the mapping of Givex transactions to Oracle MICROS Tenders. Each of the six Givex transactions that require configuration correspond to a Tender:

- Gift Card Redeem (Givex service 901, 902, 921)
- Cash Back (Givex service 919)
- Points Issue (Givex service 911)
- Pre Auth (Givex service 920)
- Promotion Card Redeem (Givex service 901, 902, 921)
- Ticket Redeem (Givex service 901, 902, 921)

Set the **TENDER_BASE** to equal the corresponding Tender Media record numbers in the EMC, For example, if the Givex Tender Media record numbers set in EMC are listed as **2, 3, 4, 5**, then set it as **TENDER_BASE = 2, 3, 4, 5**. The configuration file provides comments that explain the process in further detail for other examples.

d. **TERMINALS**: Set the **TID=USER, PASSWORD** to the following:

- TERMINAL ID (TID) = Workstation Object number (record number as shown in the EMC)
- USER = Givex Terminal user ID
- PASSWORD = Givex Terminal user password

The Givex terminal user ID and password are provided to you by Givex. Each workstation/terminal in the system requires one entry. The configuration file provides comments that explain the process in further detail.

4. After completing the necessary changes to the file, click **File**, and then click **Save**.
5. To ensure that the configuration changes take place on the workstation, navigate to **Windows Services**, locate the Givex adaptor named **Givex SVC Adaptor**, click the service, and then click **Restart**.

Stored Value Solutions (SVS) Processor

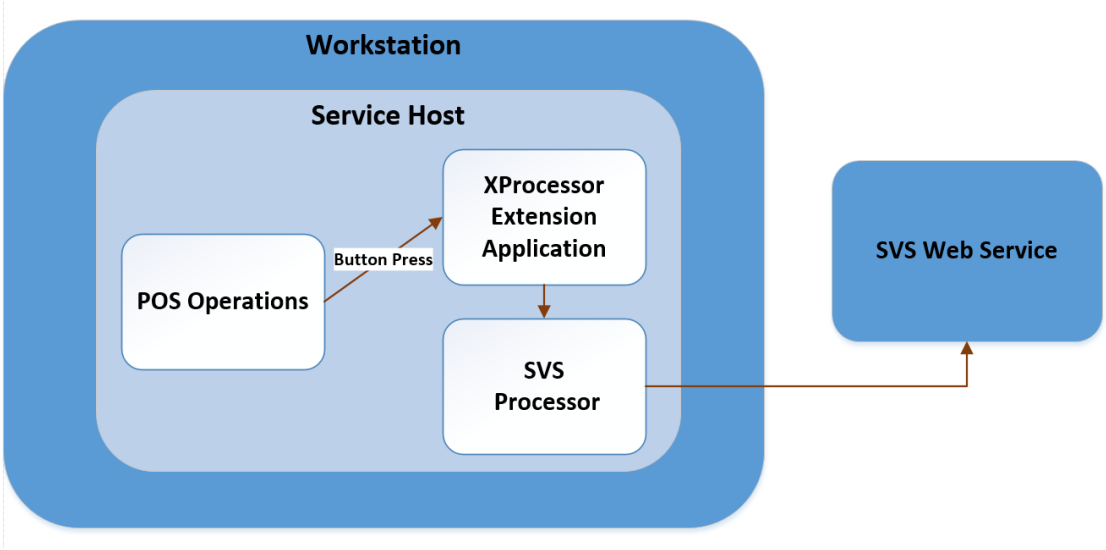
The SVS Processor is an extension to the XProcessor Extension Application. It provides access to the SVS gift card service. This section describes how to configure the SVS XProcessor plug-in.

Here is a listing of the supported operations for the SVS Processor:

- Activate
- Authorize
- Cash Out
- *Optional - Enable Bonus Gift Card

- Finalize
- Inquire
- Issue
- Redeem
- Reload
- Void Reload

Figure 50-8 SVS Processor Data Flow



Setting up the SVS Processor consists of adding or modifying records in the following EMC modules:

- Content
- Interfaces / Payments module
- Page Design
- Service Charges
- Tender/Media

If you are an existing SVS customer, you can continue using your SVS Processor configuration, but you must be using the latest release package, which is Version 1.2.2.22.

Configuring the SVS Tender/Media Record

You must configure Tender/Media records for use with the SVS Processor for the gift card service.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Insert a record, name it **SVS Redeem**, and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.

5. Repeat steps 2 through 4 to create the remaining two Tender/Media records as follows:
   - **SVS Cashout** record with a **Key Type** value of **3 - Pickup**.
   - **SVS Void Cashout** record with a **Key Type** value of **4 - Loan**.
6. Click **Save**.

Configuring the SVS Service Charge Records

You can configure up to four service charge records for use with the SVS Processor plug-in for gift card service. The services charges are:

- SVS Issue SVC Charge
- SVS Activate SVC Charge
- SVS Reload SVC Charge

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
2. Insert a record, name it **SVS Issue SVC Charge**, and then click **OK**.
3. Double-click the record to open it.
4. Select option **14 - Service Charge Used For Stored Value Transactions**.
5. Set other Service Charge fields and options as needed. Configuring Service Charges contains more information about the fields and options.
6. Click **Save**.
7. Repeat steps 2 through 6 to create the remaining service charge records, following a similar naming convention (for example, SVS [Service Charge name] SVC Charge).

Configuring the SVS Discount Record

You must create a discount record for use with the SVS Processor plug-in for the gift card service. The discount is used to implement the optional SVS Bonus Gift Card.

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Discounts**.
2. Insert a record, name it **SVS Bonus GC Redeem**, and then click **OK**.
3. Double-click the record to open it.
4. Set other Discount fields and options as needed. Configuring Discounts contains more information about the fields and options.
5. Click **Save**.

Configuring the SVS Processor and Content Files

The SVS processor is an extension to the XProcessor Extension Application. It provides access to the Stored Value Solutions (SVS) gift card solution.

Before configuring the SVS Processor, you must ensure that the XProcessor Extension Application Framework is installed and configured.

Follow the steps outlined in Setting Up the XProcessor Framework before continuing with the SVS processor configuration. After performing an upgrade, existing SVS Processor users can continue using their current SVS processor configuration as long as the latest SVS release package is being utilized. The latest SVS version is 1.2.2.22.

The instructions in this topic explain how to add the following SVS Processor files to the Content module in the EMC.

Table 50-3 SVS Processor Content Filename and Description

Filename	Description
SVSProcessor.svs	SVS Processor configuration.
SVSHostSettings.svs	Sets various connection settings to the SVS host vendor and enables or disables the optional bonus card feature.
SVSBonusCard.svs	Enables the issuance of a bonus gift card with a pre-configured limited amount value.

Ensure that you enter the filename exactly as shown; otherwise problems may occur in the system. Do not include the file extension, for example *.xml or *.dll, in the records **Name** field.

1. Select the Enterprise level, click **Setup**, and then click **Content**.
2. Double-click the **XProcessorConfiguration** row in the **Name** column.
3. Locate the `processor id="svs"` entry. This file includes an entry for the SVS Processor as shown in the following figure:

Figure 50-9 XProcessor Configuration Entry for SVS

XProcessorConfiguration (SVS)

```
1  <?xml version="1.0" encoding="utf-8" ?>
2  <settings>
3      <processors>
4          <!-- A processor element is used to register processors that can execute operations. -->
5          <processor id="svs" filename="Micros.XProcessor.SVS.dll" type="Micros.XProcessor.SVS.SVSProcessor" />
6      </processors>
7
8      <general logverbosity="Debug">
9          <!-- Valid logverbosity values: Debug, Info, Error. Info is recommended unless troubleshooting a problem. -->
10     </general>
11 </settings>
```

If you are using only the SVS Processor for the gift card service, un-comment the SVS Processor and delete or keep the existing comment marks around the other processors.

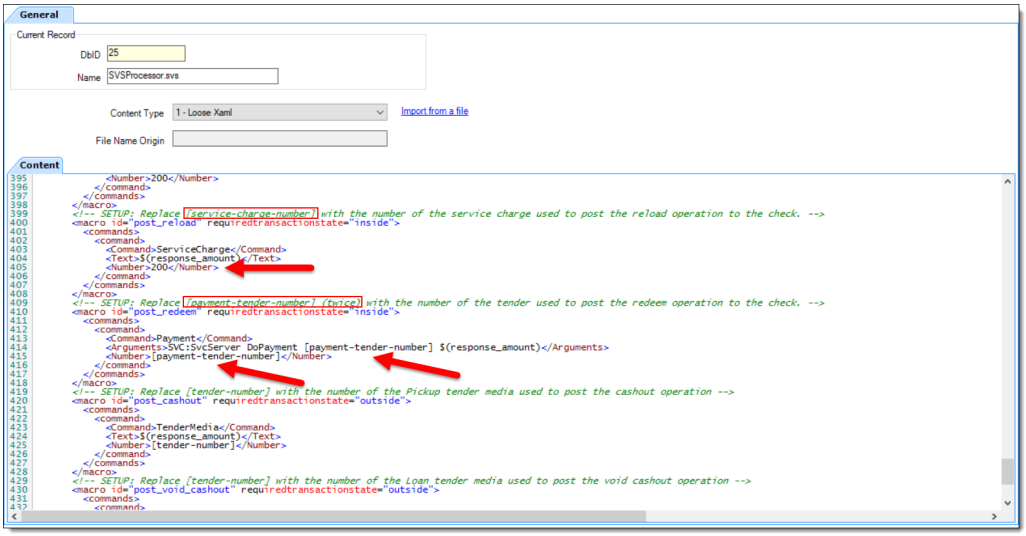
4. Click the insert icon

on the toolbar.
5. In the record's **Name** field, enter **SVSProcessor.svs**, and then click **OK**.
6. Double-click the **SVSProcessor.svs** row and set the **Content Type** to **1 - Loose Xaml**, so you can see the tags in various colors, making it easier to read.
7. Click the **Import from a file** link.
8. Browse to `[Drive Letter]:\MICROS\Simphony2\EMCClient`, select **SVSProcessor.svs.xml**, and then click **Open**.
9. You must modify the imported **SVSProcessor.svs** file so each applicable `<macro>` entry in the SVSProcessor.svs file has the actual EMC record number for the respective Tender/ Media or Service Charges. Another option is to remove individual macros you do not intend to use. Edit the file as needed to use the correct:

- **Currency Code**: For the `currencycode` setting near the beginning of the imported SVSProcessor.svs file. This setting defaults to **USD** (which stands for US Dollars).
- **Reload Service Charge**: For the `macro id-"post_reload"` operation, enter the `[service-charge-number]` record number (as shown in the EMC) between the braces.
- **Redeem Tender Media**: For the `macro id="post_redeem"` operation, enter the `[payment-tender-number]` Tender/Media record number (twice as shown in the EMC) between the braces.
- **Cash Out Tender Media**: For the `macro id="post_cashout"` operation, enter the `[payment-tender-number]` record number (as shown in the EMC) between the braces.

> **Note:**
>
> When entering EMC record numbers for macros, such as a `[payment-tender-number]` or a `[service-charge-number]`, remove the placeholder braces, leaving only the record number between the **Number** tags. Brace removal applies when editing all of the imported *.xml files.

Figure 50-10 EMC Content Module - SVSProcessor.svs Configuration



a. Repeat step 9 for each remaining macro operation you want to enable for the this processor.

b. Click **Save**.

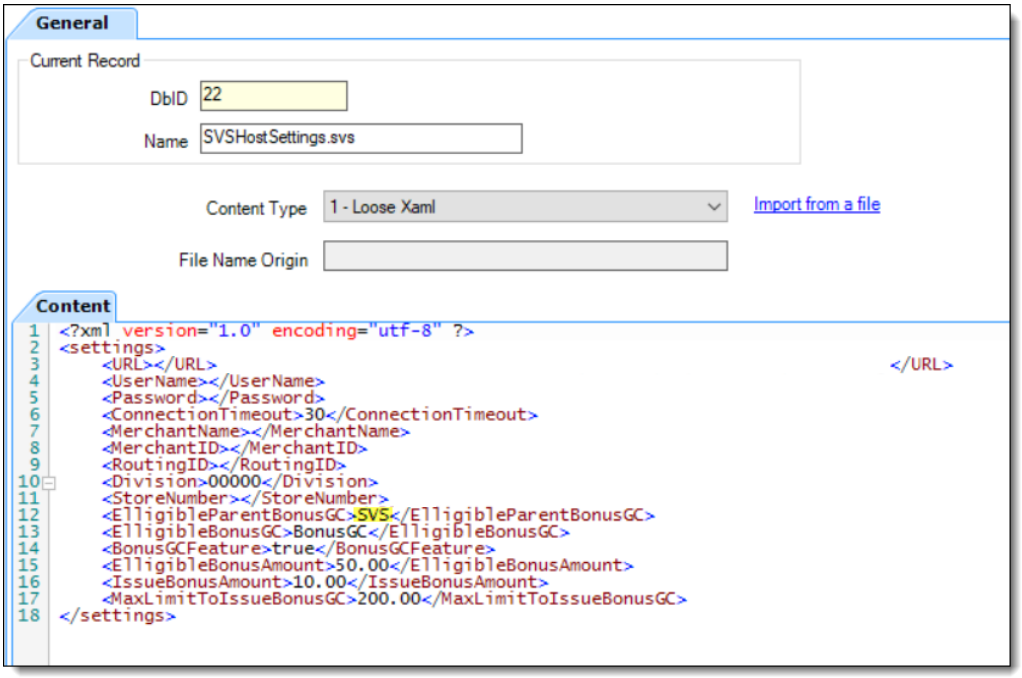
10. Add the **SVSHostSettings.svs** configuration file to the **Content** module.

    This file needs to be modified to set various connection settings to the SVS host and to enable the optional Bonus Gift Card feature. Entries here also set the bonus gift card's amount values.

    a. Import the **SVSHostSettings.svs.xml** file available in the `[Drive Letter]:\MICROS\Simphony2\EMCClient` folder.

    b. Modify this configuration file for rows 3 through 11 to match the information provided by your SVS service provider.

Figure 50-11 EMC Content Module - Imported SVSHostSettings.svs File

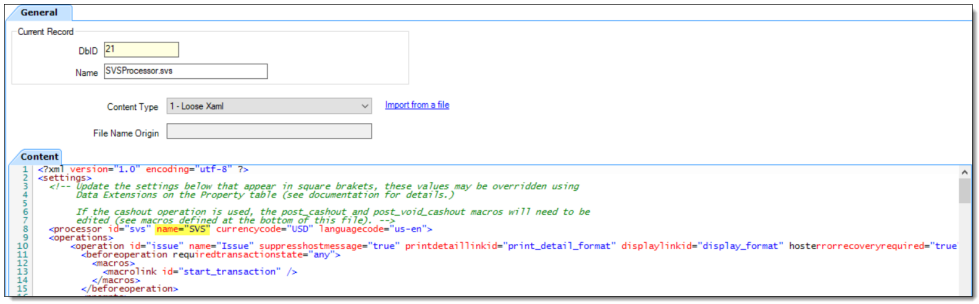


c. To enable the Bonus Gift Card feature, configure rows 12 through 17:

> **Note:**
>
> Bonus Card configuration is required even if users have no intention of using the Bonus Card feature. As described in step 11 (below), the **SVSBonusCard.svs** XML file must be added to the Content module and the file needs to have its placeholder values replaced with valid record numbers (even if they are not referring to actual service charge or discount entries). Add valid service charge and discount record numbers to the placeholder fields as shown in this figure: EMC Content Module - Imported SVSBonusCard.svs File.

- **ElligibleParentBonusGC**: This field is user defined, but must match the **name** field of the parent processor as configured in the SVSProcessor.svs file (shown below).

Figure 50-12 EMC Content Module - Imported SVSProcessor.svs File



- **ElligibleBonusGC**: This field is user defined, but must match the **name** field located in the SVSBonusCard.svs (shown below).

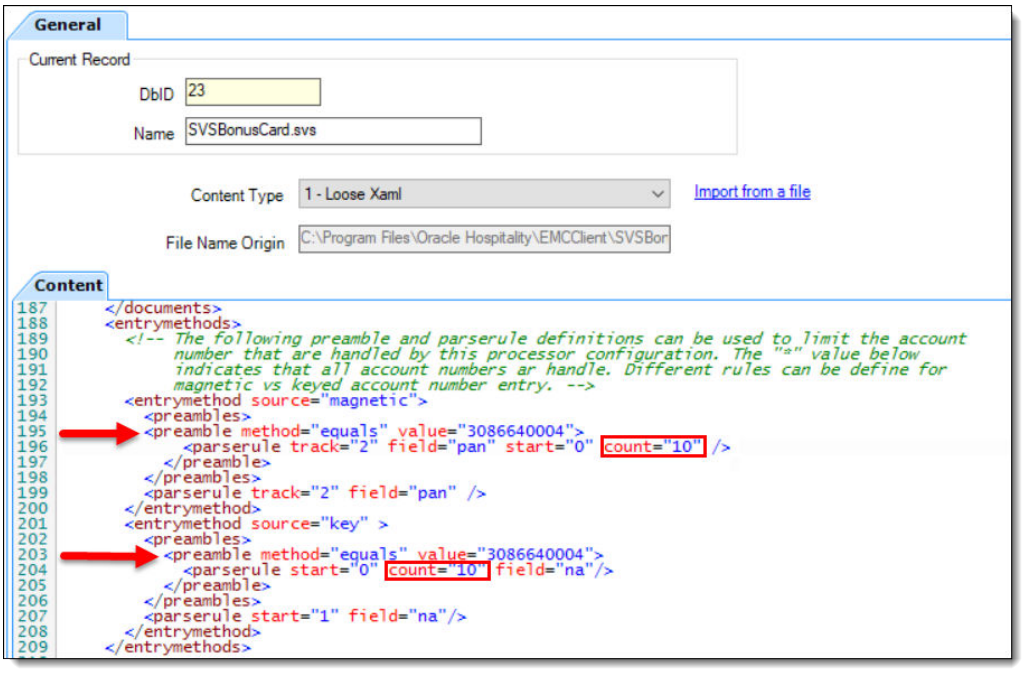
Figure 50-13 EMC Content Module - Imported SVSProcessor.svs File



- **BonusGCFeature**: This field enables the Bonus Gift Card feature by setting it to **true**. The default setting for this field is **false** (disabled).
- **ElligibleBonusAmount**: This field is for used to establish the amount that customers are eligible for an additional bonus gift card after the ElligibleBonusAmount field's threshold is reached. In the Figure EMC Content Module - Imported SVSHostSettings.svs File (above), because the eligible bonus amount is set to 50.00, when a customer purchases a 50.00 gift card, they are eligible to receive an additional bonus gift card amount as configured in the subsequent IssueBonusAmount field (this amount is 10.00 as shown in the same figure).
- **IssueBonusAmount**: This field establishes the amount of the bonus gift card that is issued when customers meet the configured bonus gift card threshold amount. This amount must match what SVS has configured.
- **MaxLimitToIssueBonusGC**: This field establishes the maximum amount customers are eligible for earning additional bonus gift cards. In other words, if this value is set to 200.00, customers are limited to earning four 50.00 gift cards (for a total of 200.00), thus earning four bonus gift cards (worth 10.00 each for a total value of 40.00).

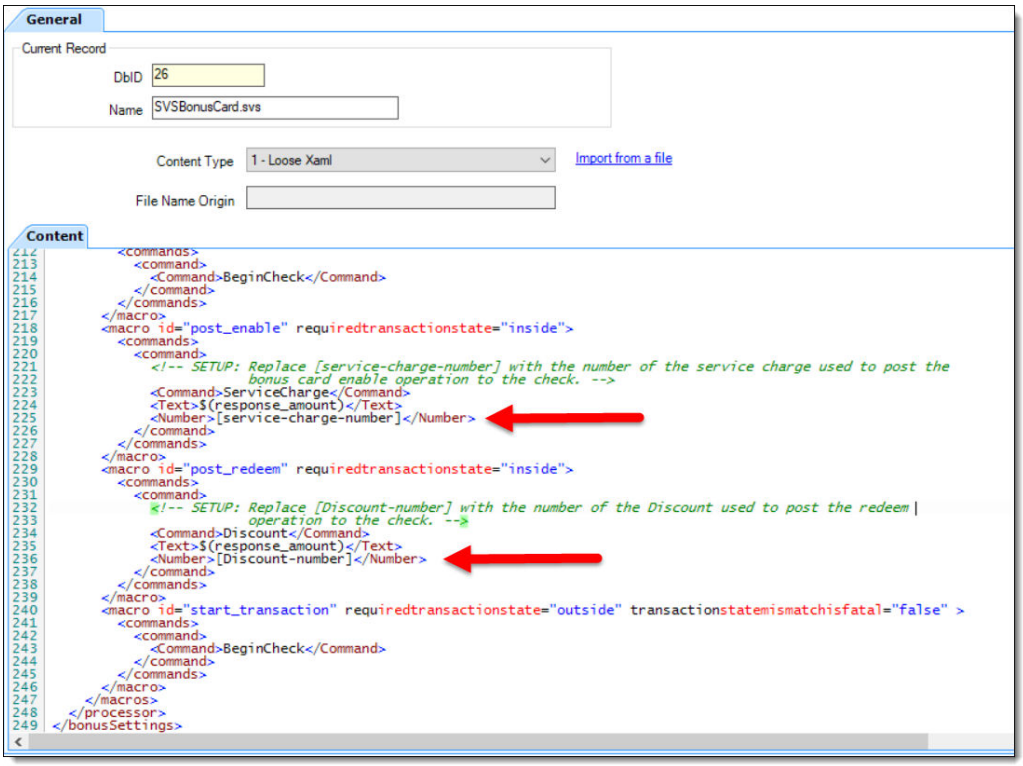
11. Add the **SVSBonusCard.svs** configuration file.
    a. Import the **SVSBonusCard.svs.xml** file available in the `[Drive Letter]:\MICROS\Simphony2\EMCClient` folder.
    b. To assist the system with identifying gift cards (for both magnetically swiped and manually entered cards), enter your issued gift cards preamble numbers in the **value** field. Scroll down to the preamble section (near row 190) and edit the rows beginning with **preamble**. You must determine how many preamble digits you want to enter. Oracle Food and Beverage recommends entering a range from 10 to 17 digits.
    c. Enter the number of digits you entered in the **value** field in the **count** field. The number of digits entered in the **value** field must match the number entered in the **count** field.

Figure 50-14 EMC Content Module - Imported SVSBonusCard.svs File Preamble Settings



d. Bonus card transactions are primarily handled based on the assigned discount. Modify the configuration file with the appropriate service charge and discount record numbers between the braces, leaving only the record number between the **Number** tags.

Figure 50-15 EMC Content Module - Imported SVSBonusCard.svs File



12. Click **Save**.
13. Update or reload the database on the workstation to ensure that the changes apply to the workstation.

    Updating Workstations After Configuration Changes in the *Oracle MICROS Simphony POS User Guide* contains information about this process.

Creating SVS Operations Buttons

You need to add a button to POS operations for each supported SVS Processor operation to function on the workstation. Each button needs to be set to the Function **Run Extensibility App**.

The following table lists the SVS operations (button names), descriptions, and argument strings which are used in the Page Design module. Refer to the following information when configuring touchscreen buttons.

Table 50-4 SVS Operation Buttons

Operation Name	Description	Argument String
Activate	Activate a denominated or pre-valued gift card	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Activate
Authorize	Authorize the use of a card for payment. This function is used in conjunction with Finalize.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Authorize;Arg=<XProcessorArgs transactionstate="inside" />
Cash Out	Remove the remaining balance of the gift card as a cash payment.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Cashout;Arg=<XProcessorArgs transactionstate="outside" />
Finalize	Use the gift card as payment. This function is used in conjunction with Authorize.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Finalize;Arg=<XProcessorArgs suppressaccountprompt="true" selectpendingoperation="true" transactionstate="inside"/>
Inquire	Retrieve the current balance of a gift card.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Inquire
Issue	Activate a non-denominated gift card.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Issue
Redeem	Use the gift card as payment.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Redeem;Arg=<XProcessorArgs transactionstate="inside" />
Reload	Add value to an active gift card via a payment.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=Reload
Void Cash Out	Reverse a previously performed cash out operation.	Type=DLL;AppName=XProcessor;FileName=Micros.XProcessor.dll;Script=void_cashout;Arg=<XProcessorArgs transactionstate="outside" />

Table 50-4 (Cont.) SVS Operation Buttons

Operation Name	Description	Argument String
Void Reload	Reverse a previously reloaded service charge.	Reloaded service charge representing the amount for reload is voided using the void button on the screen. This does not have String Arguments like the above operations.

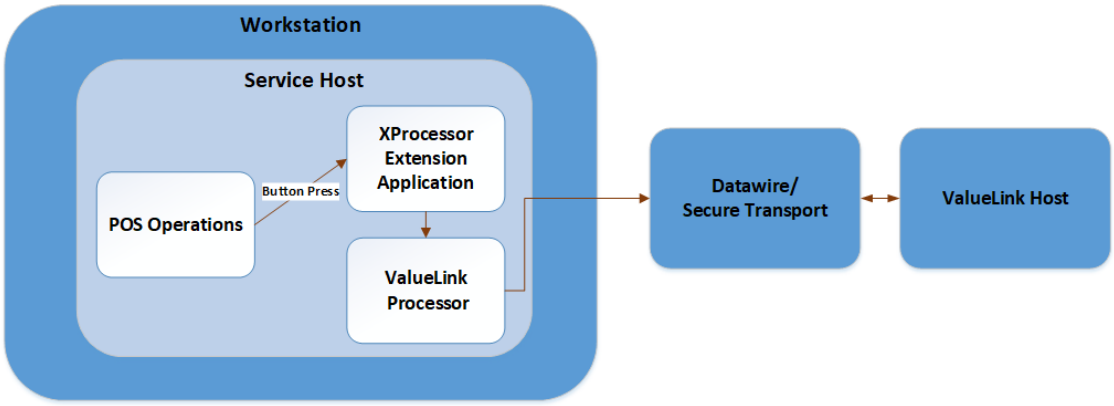
1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place SVS Processor buttons.
3. On the **Edit** tab, select the page area in which to define the SVS Processor functions.
4. Click **Button**.
5. On the **General** subtab, in the **Legend** field, enter the operation name (button).
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow beneath the **Type** drop-down list.
8. Select **Extensibility** from the **Type** pane, select **Run Extensibility App** in the **Results** pane, and then click **OK**.
9. Click inside the **Arguments** field (left of the black arrow). The easiest way to complete this field for each operation name is to copy and paste the information from the table in the Arguments String field.

   Ensure that there are no spaces within the string.
10. Repeat steps 4 through 9 to create buttons for each of the SVS operations listed in the table.
11. Click **Save**.

ValueLink Processor

The ValueLink Processor is an extension to the XProcessor Extension Application. It provides access to Fiserv's ValueLink gift card service. The processor communicates with Fiserv's (formerly FirstData) ValueLink Host either by Fiserv's Secure Transport or Frame Relay via TCP/IP.

Figure 50-16 ValueLink Processor Data Flow



Setting up the ValueLink Processor consists of adding or modifying records in the following EMC modules:

- Content
- Page Design
- Payments
- Service Charges
- Tender/Media

If you are an existing ValueLink customer, you can continue using your ValueLink Processor configuration, but you must be using the latest release package, which is Version 2.10.0.9997.

Configuring the ValueLink Tender/Media Record

You must configure four tenders for use with the ValueLink Processor for gift card service. The following table lists each Tender/Media record, and the corresponding value to select in the **Key Type** field.

Table 50-5 ValueLink Processor Tender/Media Records and Key Types

Tender/Media Record	Key Type
ValueLink Redeem	1 - Payment
ValueLink Cashout	3 - Pickup
ValueLink Void Cashout	4 - Loan
ValueLink Refund	1 - Payment

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Insert a record, name it **ValueLink Redeem**, and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Repeat steps 2 through 4 to create the remaining three Tender/Media records.
6. Click **Save**.

Configuring the ValueLink Service Charge Record

You must configure four service charge records for use with the ValueLink Processor for gift card service. The services charges are:.

- ValueLink Activate
- ValueLink Batch Activate
- ValueLink Activation Return
- ValueLink Reload

1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
2. Insert a record, name it **ValueLink Activate**, and then click **OK**.
3. Double-click the record to open it.
4. Select option **14 - Service Charge Used For Stored Value Transactions**.
5. Set other Service Charge fields and options as needed. Configuring Service Charges contains more information about the fields and options.
6. Click **Save**.
7. Repeat steps 2 through 6 to create the remaining three service charge records.

Configuring the ValueLink Processor Content Files

Before configuring the ValueLink Processor plug-in, you must ensure that the XProcessor Extension Application is installed and configured. Setting Up the XProcessor Framework contains more information.

The instructions in this topic explain how to add the following files to the Content module in the EMC:

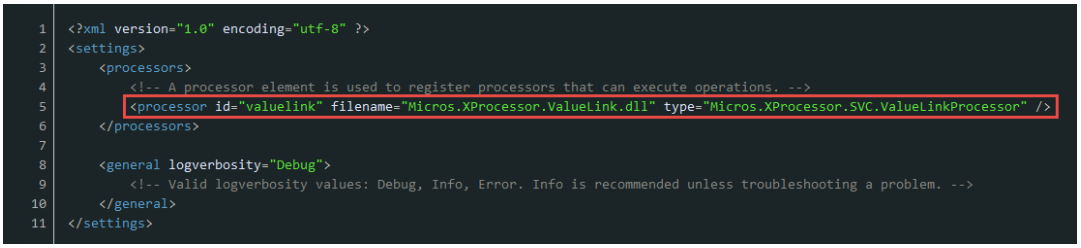
Table 50-6 ValueLink Processor Content Filenames and Descriptions

Filename	Description
ValueLinkProcessor.valuelink	ValueLink Processor configuration.
ValueLinkHostDefault.valuelink	ValueLink Processor connection configuration defined at the Enterprise level, and applies to any property in the Enterprise. This file does not require modifications for each property. This file and the ValueLinkHost.valuelink file both control the connection settings between the workstations and the ValueLink host.
ValueLinkHost.valuelink	ValueLink Processor connection configuration defined at the Enterprise level. Can be overridden at the property or revenue center level with property-specific values.
ValueLink2Settings	ValueLink2 DLL configuration.

1. Select the Enterprise level, click **Setup**, and then click **Content**.
2. Double-click the **XProcessorConfiguration** row in the **Name** column.

3. Locate the `processor id="valuelink"` entry. The file includes an entry for the ValueLink Processor as shown in the following figure:

Figure 50-17 XProcessorConfiguration Entry for ValueLink



If you are using only the ValueLink Processor for gift card service, delete the other entries or use comment marks around them.

4. Click the insert icon



on the toolbar.

5. In the **Record Name** field, enter **ValueLinkProcessor.valuelink**, and then click **OK**.

   Ensure that you enter the filename exactly as shown; otherwise problems may occur in the system. Do not include the file extension (for example *.xml or *.dll) in the **Record Name** field.

6. Double-click the **ValueLinkProcessor.valuelink** row.
7. Set the **Content Type** to **1 - Loose Xaml** so you can see the tags in various colors, making it easier to read.
8. Click the **Import from a file** link.
9. Browse to [Drive Letter]:\MICROS\Simphony2\EMCClient, select **ValueLinkProcessor.valuelink**, and then click **Open**.
10. Edit the ValueLinkProcessor.valuelink file to include the actual Tender/Media and/or Service Charge tags:

    You must modify the imported **ValueLinkProcessor.valuelink** file so each applicable `<macro>` entry in the file has the actual EMC record number for the respective Tender/Media or Service Charges. Another option is to remove individual macros you do not intend to use.

    a. Scroll approximately halfway down the file to the tag `macro id="post_redeem"`.
    b. Replace `[payment-tender-number]` and `[tender-number]` in two places with the actual Tender/Media object record number for the ValueLink Processor.
    c. Replace `[service-charge-number]` with the actual Service Charge object record number for the ValueLink Processor.

> **Note:**
>
> When entering EMC record numbers for macros such as a `[payment-tender-number]` or a `[service-charge-number]`, remove the placeholder braces, thus leaving only the record number between the **Number** tags. Brace removal applies when editing all of the imported *.xml files.

11. Click **Save**.
12. Click the insert icon  on the toolbar.
13. In the **Record Name** field, enter **ValueLinkHostDefault.valuelink**, and then click **OK**.
14. Double-click the **ValueLinkHostDefault.valuelink** row.
15. Click the **Import from a file** link.
16. Browse to [Drive Letter]:\MICROS\Simphony2\EMCClient, select **ValueLinkHostDefault.valuelink**, and then click **Open**.
17. Change the ValueLinkHostDefault.valuelink file to include the appropriate entries, replacing the tags in braces with the correct information for the site.

    The comments in the file explain the acceptable values.
18. Click **Save**.
19. Click the insert icon  on the toolbar.
20. In the **Record Name** field, enter **ValueLinkHost.valuelink**, and then click **OK**.
21. Double-click the **ValueLinkHost.valuelink** row.
22. Click the **Import from a file** link.
23. Browse to [Drive Letter]:\MICROS\Simphony2\EMCClient, select **ValueLinkHost.valuelink**, and then click **Open**.
24. Scroll to the `Datawire` tag. If the `<DID>` tag is blank (all zeros), the system will trigger the merchant registration process. After completing this registration process, replace the `<DID>` tag with the new MerchantID number.

    The values for `<MerchantID>`, `<AltMerchantID>`, and `<TerminalID>` are provided by Datawire. The default values provided are not the actual values for these tags.
25. Click **Save**.
26. Click the insert icon  on the toolbar.
27. In the **Record Name** field, enter **ValueLink2Settings**, and then click **OK**.
28. Double-click the **ValueLink2Settings** row.
29. Click the **Import from a file** link.
30. Browse to [Drive Letter]:\MICROS\Simphony2\EMCClient, select **ValueLink2Settings**, and then click **Open**.

31. Change the ValueLink2Settings file if needed.
32. Click **Save**.
33. Update or reload your database on the workstation to ensure that the changes apply to the workstation.

    Updating Workstations After Configuration Changes in the *Oracle MICROS Simphony POS User Guide* contains information about this process.

Creating ValueLink Operations Buttons

You need to add a button to POS operations for each supported ValueLink Processor operation to function on the workstation. Each button needs to be set to the Function **Run Extensibility App**.

The following table lists the ValueLink operations (button names), descriptions, and argument strings that are used in the Page Design module. You will use this information in the subsequent steps.

Table 50-7 ValueLink Operation Buttons

Operation Name	Description	Argument String
Activate	Activate a gift card.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=Activate;arg=<XProcessorArgs><AccountEntryRules title="Activate" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Denominated Activate or Activate Denominated	Activate a denominated gift card.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=denominated_activate;arg=<XProcessorArgs><AccountEntryRules title="Activate" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>

Table 50-7 (Cont.) ValueLink Operation Buttons

Operation Name	Description	Argument String
Activate on Hold	Activate a gift card and change its status to “On Hold” until payment is made.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=ActivateOnHold;arg=<XProcessorArgs><AccountEntryRules title="Activation on Hold" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Denominated Activate On Hold or Activate On Hold Denominated	Activate a denominated gift card and change its status to “On Hold” until payment is made.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=denominated_ActivateOnHold;arg=<XProcessorArgs><AccountEntryRules title="Activation on Hold" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Activation Return	Reverse a gift card activation. This function does not require access to the original check, unlike a touch void.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=Activation_Return;arg=<XProcessorArgs><AccountEntryRules title="Activation Return" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Authorize	Authorize the use of a card for payment. This function is used in conjunction with Finalize	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=authorize;arg=<XProcessorArgs transactionstate="inside"><AccountEntryRules title="Authorize" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>

Table 50-7 (Cont.) ValueLink Operation Buttons

Operation Name	Description	Argument String
Batch Activate	Activate multiple gift cards.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=BatchActivate;arg=<XProcessorArgs><AccountEntryRules title="Batch Activate" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Cash Out	Remove the remaining balance of the gift card as a cash payment.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=cashout;arg=<XProcessorArgs transactionstate="outside"><AccountEntryRules title="Cash Out" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Finalize	Use the gift card as payment. This function is used in conjunction with Authorize.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=finalize;arg=<XProcessorArgs suppressaccountprompt="true" selectpendingoperation="true" transactionstate="inside"><AccountEntryRules title="Finalize" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>

Table 50-7 (Cont.) ValueLink Operation Buttons

Operation Name	Description	Argument String
Inquire	Retrieve the current balance of a gift card.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=Inquire;arg=<XProcessorArgs><AccountEntryRules title="Inquire" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Redeem	Use the gift card as payment.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=Redeem;arg=<XProcessorArgs transactionstate="inside"><AccountEntryRules title="Redeem" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Refund	Add value to an active gift card via a return.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=Refund;arg=<XProcessorArgs transactionstate="inside"<AccountEntryRules title="Refund" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Reload	Add value to an active gift card via a payment.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=Reload;arg=<XProcessorArgs><AccountEntryRules title="Reload" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>

Table 50-7 (Cont.) ValueLink Operation Buttons

Operation Name	Description	Argument String
Reload on Hold	Add value to an active gift card and change its status to “On Hold” until payment is made.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=ReloadOnHold;arg=<XProcessorArgs><AccountEntryRules title="Reload on Hold" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Remove on Hold Status	Manually remove a card’s “On Hold” status.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=RemoveOnHoldStatus;arg=<XProcessorArgs><AccountEntryRules title="Remove on Hold Status" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Void Cash Out	Reverse a previously performed cash out operation.	type=dll;appname=XProcessor;filename=ValueLink2.dll;script=void_cashout;arg=<XProcessorArgs transactionstate="outside"><AccountEntryRules title="Void Cash Out" prompt="Enter name or swipe card" entrytype="String" allowmanual="true" allowbarcode="true" allowmagcard="true" allowmicrosemployeecard="false" allowfingerprint="false" maskentry="false"/></XProcessorArgs>
Transaction Cancel	Prompt a workstation operator to void any existing gift card operations when attempting to cancel a transaction.	type=DLL;Appname=XProcessor;FileName=TransCancelExt.dll;

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place ValueLink Processor buttons.
3. On the **Edit** tab, select the page area in which to define the ValueLink Processor functions.
4. Click **Button**.
5. On the **General** subtab, in the **Legend** field, enter the operation name (button).
6. Select **Function** from the **Type** drop-down list.

7. Click the black arrow beneath the **Type** drop-down list.
8. Select **Extensibility** from the **Type** pane, select **Run Extensibility App** in the **Results** pane, and then click **OK**.
9. Click inside the **Arguments** field (left of the black arrow). The easiest way to complete this field for each operation name is to copy and paste the information from the table in the Arguments String field.

   Ensure that there are no spaces within the string.
10. Repeat steps 4 through 9 to create buttons for each of the ValueLink operations listed in the table.
11. Click **Save**.

Perform DataWire Merchant Registration

If you are using the ValueLink processor plug-in, you need to perform these steps once in POS Operations on the workstation. It is ideal if the workstation is connected to a printer.

1. Sign in to the workstation.
2. Click the **XProcessor** tab, and then click the **ValueLink** button.
3. Click the function key for **Balance Inquiry**.
4. Enter any number, and then click **OK**. The ValueLink processor begins the initialization, attempting to communicate with the ValueLink Host. After successful registration, a message appears stating that ValueLink Datawire registration has been performed. The Datawire MID, TID, and newly generated DID number appear.
5. Print or write down the Datawire DID value as you need to update the Content configuration file with this number.
6. In the EMC, select the Enterprise level, click **Setup**, and then click **Content**.
7. Double-click the **ValueLinkHost.valuelink** row.
8. Scroll to the `Datawire` tag, and enter the new DID number between the `<DID>` and `</DID>` tags.
9. Click **Save**.
10. Update or reload your database on the workstation to ensure that the changes apply to the workstation.

    Updating Workstations After Configuration Changes in the *Oracle MICROS Simphony POS User Guide* contains information about this process.

51
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. Setting an event allows you to accurately track sales and inventory, particularly when multiple events occur in a single business day (for example, a baseball double header).

You can configure events from the EMC, update event status and associate checks with a specific event at the POS client, view various event reports in Reporting and Analytics, import and export event totals. You initiate events in the following ways:

- Automatically
- On a predefined schedule
- Through a call to an event service
- Using a function key on the workstation

Simphony retains all event information (including changes to events) for use in reporting and auditing.

Configuring Event Privileges and Permissions

You can assign event privileges to employees.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type, and click the **EMC Modules** tab.
3. For each of the following event-related items listed in the File column, select the appropriate employee privileges (**View**, **Edit**, **Add**, and **Delete**):
    - **Event Types**: This file controls the ability to view, change, create, and delete event types and sub types.
    - **Event Areas**: This file controls the ability to view, change, create, and delete event areas.
    - **Event Definitions**: This file controls the ability to view, change, create, and delete events.

    Setting Employee Roles contains more information about setting employee privileges.
4. To set field level permissions, click the **Fields** tab.
5. Select **Event Definitions** from the EMC Modules list.
6. For **Areas** and **Cancel Event**, select the appropriate permissions from the **Access** drop-down list.
7. To set event check privileges, click the **Operations** tab, and then click the **Transactions** subtab.
8. Select the appropriate options for the privileges. The following table summarizes the check privileges associated with event functionality and the recommended roles to have the privilege set.

Table 51-1 Event Check Privileges

Option Number	Privilege Name	Allow the Employee to Authorize or Perform ...	Recommended Roles
270	Authorize/Perform association of a new check to an ended event	Creating a new check and linking it to a closed or ended event	Manager
271	Authorize/Perform override of the "Event association to a Check is mandatory" option (Control Parameters)	Beginning a check without linking it to an event	Manager

9. Click the **Miscellaneous** subtab.
10. Select the appropriate options for the privileges. The following table summarizes the workstation privileges associated with event functionality and the recommended roles to have the privilege set.

Table 51-2 Event Privileges

Option Number	Privilege Name	Allow the Employee to Authorize or Perform ...	Recommended Roles
272	Authorize/Perform Start an Event	Starting an event	Manager
273	Authorize/Perform End an Event	Ending an event	Manager
276	Authorize/Perform Select an Event	Selecting an active event as the workstation operator's default event	Manager
277	Allow selection of 'No Default Area Selected' when assigning default event	Selecting a default event without selecting a default area.	Manager

11. Click **Save**.

Specifying Ad Hoc Reports

You must assign privileges to the employee to run event-related reports from a workstation at the property.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click **Operations**, and then click **Ad Hoc Reports**.
3. Select the appropriate event report privileges.

Table 51-3 Event Report Privileges

Report Privilege	Description
31068 - Run Property Financial Event Report	Provides information about events for each property, total event and non-event sales for selected dates, and outstanding (open) checks associated with events.
31069 - Run Employee Financial Event Report	Provides information about individual employee performance for specific events.
31070 - Run Menu Item Sales Event Report	Provides a summary of the menu item sales by revenue center and by employee for each event.
31071 - Run Event Financial Report	Provides a summary of the daily financials by event broken down by area.

4. Click **Save**.

Enabling Events

You need to enable events to associate transactions with events and to use event reporting.

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Options** tab, and then select **51 - Enable Events Reporting**.
3. Click **Save**.

> **Note:**
>
> When option **51 - Enable Events Reporting** is enabled , users should expect to be prompted for each newly opened check at point-of-sales (POS) workstations. If Control Parameters option **67 - Association of an Event to every Guest Check is mandatory where Event is enabled** is disabled, from the Select Check Event window, click **None** and then **Ok** to proceed with the order. If option 67 is enabled, users are required to choose an Event, or if no Event currently exists, users receive a *No events to select* message prompt.

Configuring Event Types and Sub Types

An employee with the event types privileges can configure event types and sub types.

1. Select the Enterprise level, click **Setup**, and then click **Event Types**.
2. Insert a record for the event (for example, Baseball Double Header or Social), and then click **OK**.
3. Double-click the event record to open it in form view.
4. To create event sub types related to the event type, in the Event Sub-Types section click **Add**, and then enter an event sub type name (for example, Baseball Game 1, Baseball Game 2, or Wedding).
5. To delete an event sub-type, highlight the Event Sub-Type, and then click **Delete** in the Event Sub-Types section.

6. (Optional) Select the **Menu Level Link** and the **Sub Level Link** to associate with the event type. You must select a main menu level before you can set a sub menu level.

   When you assign main or sub levels to an event type, the event transactions at the POS client use these menu levels rather than the default levels. This configuration is useful when a venue and customer agree to a specific pricing level for the event type. For example, a Happy Hour menu level can be set for an event type of Social. This configuration allows a wedding event to apply Happy Hour prices at the workstation, overriding default menu levels set at the revenue center level.

7. Click **Save**.

Creating an Event

1. Select the property, click **Configuration**, and then click **Event Definitions**.
2. Insert a new record, enter a name for the event definition, and then double-click the new record.
3. From the Event Data section, enter information in the fields as described in the following table:

Table 51-4 Event Data Fields

Field	Description
Short Code	Enter an alphanumeric event code. The application appends this code with an automatically generated code to make the value unique.
Type	Select an event type for the event.
Sub Type	Select an event sub type for the event.
Event Start and Event End	Select the event start and end dates. Select **Auto Start** and **Auto End** to have the event automatically start or end when the Event Start or End date and time are reached. Dates and times are required when selecting the **Auto Start** and **Auto End** options. When a workstation is offline and has no connection to the Check and Posting Service (CAPS), events cannot start or end (automatically and manually).
(Optional) Attendance	Enter the number of people attending the event. You can enter this number during or after the event.

4. Click the **Revenue Centers** tab.
5. Select one or more revenue centers where the event occurs.

   To select multiple revenue centers at once, select the revenue center group from the **RVC Groups** drop-down list, and then click the **Add** button. All revenue centers included in the revenue center group are automatically selected.

   If the **RVC Groups** field is dimmed, you need to add at least one revenue center group. Configuring a Revenue Center Group contains more information about setting up revenue center groups.

6. Click **Save**.

7. Events are set as optional by default. To set the event as mandatory:
   a. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
   b. Select **67 - Association of an Event to every Guest Check is mandatory where Event feature is enabled**.

      Setting option **67** requires workstation operators to select an event when beginning a check.

      You can override this setting for an employee from the Roles module by selecting Transaction Control option **271 - Authorize/Perform override of the "Event association to a Check is mandatory" option (Control Parameters)**. Overriding option **67** allows the workstation operator to post transactions to no event.
   c. Click **Save**.

Configuring an Event Area

An employee with event areas privileges can set the areas within a property where events take place. An area can be part of one or more revenue centers, or independent of revenue centers. For example, a banking conference might be held in the banquets revenue center, in several rooms (such as banquet bar, banquet restaurant, banquet cocktail, and ballroom). You can associate these room areas with the event. When the workstation operator signs in to an event that has multiple areas, the operator must select the area in which to work. Each transaction is associated with either one area or no area. The event organizer can view information for each area on workstation reports and Reporting and Analytics reports.

1. Select the property, click **Configuration**, and then click **Event Areas**.
2. Insert a new record, and then enter a name for the event area (for example, Ballroom).
3. Click **Save**.

Linking Events

After creating an event, you can link two or more events so that when one finishes, the other starts (for example, a baseball double header). The linked child event (Game 2) inherits the attributes of the parent event (Game 1), including revenue centers, event areas, and menu levels.

1. Select the property, click **Configuration**, and then click **Event Definitions**.
2. Double-click the event record to open it in form view.
3. Click the **Links** tab.
4. To create a subsequent (child) event for the selected event, select **Add Linked Event**, and then click **Yes** at the confirmation.
5. Double-click the linked event record.
6. From the Linked Event Details dialog, enter information as described in the following table:

Table 51-5 Linked Event Details Fields

Field	Description
Event Code	You cannot enter a value. The application appends the short code with an automatically generated code to make the event code value unique.
Short Code	Enter the alphanumeric event code for the event.
Event Name	Enter a descriptive name for the event.
(Optional) Attendance	Enter the number of people attending the event. You can enter this number during or after the event.
Event End	Enter the end date and time for the event.

7. Click the **Save Changes** button.

   Linked events are not available in the event search list and do not appear in full in the Event Definitions module table view.

Breaking Linked Events

There are two methods you can use to break the link of events, each producing a different outcome for the events:

- Break the link between the last linked event and its parent, making the last event the parent event
- Change a linked event to become the parent event, with subsequent events as the new parent's linked events

1. Select the property, click **Configuration**, and then click **Event Definitions**.
2. Double-click the event record to open it in form view.
3. Click the **Links** tab.
4. To break the link between the last event and its parent:
   a. Click the **Break Link** link.
   b. Click **Yes** at the confirmation. The last linked event in the list is removed, and it now appears in the Event Definitions module search/table view as a parent event.
5. To change a linked event into a parent event:
   a. On the Links tab, double-click the linked event record (for example, select linked event 3 of 5) to open the Linked Event Details dialog.
   b. Click the **Break Link** button.
   c. Click **Yes** at the confirmation. Linked event 3 becomes a parent event, and linked events 4 and 5 become its child linked events 1 and 2.

      A linked event that has the chain broken from its parent event in the Linked Event Details dialog is available in the Event Definitions module search/table view, and contains any subsequent linked events as its linked events.

Cancelling an Event

When cancelling an event, consider the following rules:

- You can only cancel an event that has the Uninitialized status.
- You can cancel a linked event if the parent event has a Started status.
- When you cancel a parent event, all linked child events are also cancelled.
- After cancelling linked events, you cannot add new linked events if you used the Break Link function on all cancelled linked events.

1. Select the property, click **Configuration**, and then click **Event Definitions**.
2. Double-click the event record to open it in form view.
3. To cancel an event with or without linked events, click **Cancel Event**, and then click **Yes** at the confirmation.
4. To cancel one linked event:
   a. Click the **Links** tab.
   b. Double-click the linked event record to open the Linked Event Details.
   c. Click **Cancel Event**, and then click **Yes** at the confirmation.
5. To cancel multiple linked events:
   a. Click the **Links** tab.
   b. Double-click the first linked event record to open the Linked Event Details.
   c. Click **Cancel Event**, and then click **Yes** at the confirmation. The linked event Status shows Cancelled and Add Linked Event is dimmed. The parent event is not cancelled.

Configuring Event Information to Print on Checks and Receipts

You can configure the printing of an event name and code on guest check headers and trailers, customer receipts, and credit card vouchers.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
2. Click the **Options** tab.
3. Select the appropriate printing options:
   - **59 - Print Event Name After Header on Guest Checks and Receipts**: Select this option to print the event short code and name after the header on guest checks and customer receipts.
   - **60 - Print Event Name After Trailer on Guest Checks and Receipts**: Select this option to print the event short code and name after the trailer on guest checks and customer receipts.
4. Click **Save**.

Creating Task Schedules

A Task Schedule is a timed task that occurs on a Check and Posting Service Host or on a workstation. These tasks perform database-related functions that increase performance of the device.

1. Select the Enterprise or property, click **Configuration**, and then click **Task Schedules**.
2. Insert a new record or double-click an existing task schedule record to open it in form view.

   The database includes the following default task schedule records:

- **Purge C&P DB data older than 7 days**: Cleans the Check and Posting database for records older than seven days.
- **Purge WS DB data older than 7 days**: Cleans the workstation database for records older than seven days.
- **Update C&P DB Statistics**: Runs an Update Statistics command on the Check and Posting database.
- **Update WS DB Statistics**: Runs an Update Statistics command on the workstation database.

The purge jobs clear check and totals information, along with message requests that are stored in the local database.

3. From the General Settings section, enter information in the fields as described in the following table:

Table 51-6 General Settings

Field	Description
Service Type	Select the type of service to receive the task, either **7 - Workstation** or **8 - Check and Posting**.
Service ID	Select the service identification for which the task runs. You can only change this value at the property level.
Task Type	Select the type of task. When the task schedule is: • Database purge, the database for the selected service purges old data. The **Task Data** field should indicate the number of days to keep data in the local database. • Update statistics, the local database performs an update statistics job at the scheduled time. The **Task Data** field should contain a semicolon-separated list of database tables on which the Update Statistics command runs. • Run script, the **Task Data** field should contain the full path to a script to execute.
Task Data	This value shows the relevant data for the **Task Type**.
Duration (seconds)	Enter the duration of the task. The duration time prevents the task from running too long. The duration time does not cause tasks to terminate immediately. For example, the Update Statistics job finishes each database table listed, and then checks the duration of the overall task.

Table 51-6 (Cont.) General Settings

Field	Description
Time Zone	Select the time zone for the task, which determines the time of day when the task runs. A common setting for this field is **0 - Local Time Zone**, causing the task to run in each property based on the local time at the property.
Schedule Type	Select the recurrence frequency for the task schedule (for example, one time, daily, weekly, or monthly).

4. From the Duration section, select **Enabled** to run the task schedule at the set time. Deselect this option if you do not want the task schedule to run.
   a. In the **Start date** field, select the first date for the task schedule to run.
   b. To end the task schedule on a specific date, select **End date**, and then select the date for the task schedule to end. If the task schedule has no end date, select **No end date**.
5. If you selected a recurring frequency in the **Schedule Type** field, click the **Recurrence** tab. The available fields are based on the recurring frequency you selected (daily, weekly, or monthly).
6. Select the appropriate day and time options for the frequency.
7. Click **Save**.

Configuring the Event Status Bar

To allow workstation operators to see the event and check details to which sales are posting, you need to add the event status bar to the transaction page, and configure the event information that appears in the status bar.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the event status bar (typically the transaction page).
3. Click the **Configuration** tab.
4. Select one or both of the following placement options:
   - **Top Status Bar**
   - **Bottom Status Bar**
5. Click the **Add** button in the lower area.
6. From the Add Status Bar Element dialog, select **Operator Current Event Name** for each of the following POS state drop-down lists, and then click **OK**.
   - **Signed Out**
   - **Signed In**
   - **In Transaction**
7. Repeat Steps 5 and 6, selecting the following elements for each POS client drop-down list:
   - **Operator Current Event Shortcode**

- **Operator Current Event Actual Start Date Time**
- **Operator Current Event End Date Time**
- **Check Current Event Name**
- **Check Current Event Shortcode**
- **Check Current Event Actual Start Date Time**
- **Check Current Event End Date Time**

8. Click **Save**.

Configuring the Event Buttons

To allow workstation operators to manually start and end an event, you need to add buttons assigned to the touchscreen page.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the **Start Event** and **End Event** buttons.
3. On the Edit tab, select the page area in which to define the **Start Event** button.
4. Click **Button**.
5. On the General subtab, enter the button name (for example, Start Event) in the **Legend** field.
6. Select **Function** from the **Type** drop-down list.
7. Click the black arrow directly beneath the **Type** drop-down list, select the type **Event Management**, select the results **Start Event**, and then click **OK**.
8. Position and size the button on the page. Use the Style arrow to change the color.
9. Repeat Steps 3 through 9 to create the **End Event** button, selecting **End Event** for the result.
10. Click **Save**.

Event Information in Reporting and Analytics Reports

You can view Simphony event-related reporting information in Reporting and Analytics version 8.5.1 and later. The event information includes event code, name, type, sub type, and area.

Table 51-7 Reporting and Analytics Event Reporting

Report	Description
Events Summary Reports	These reports provide summary information for properties with events enabled, and help you identify top level areas that need improvement for subsequent events. The following summary reports include event information: • Events Today's Operations Report • Events Revenue Center Report Only the Events Today's Operations Report enables you to drill down to more information or investigate further by running Detail Reports.
Detail Reports	These reports help you analyze the transaction details for specific events. Parent and child events are shown separately. The following detail reports include event information: • Events Adjustments Detail Report • Events Control Report • Events Cost of Goods Sold Summary Report • Events Daily Discounts Report • Events Sales Mix Summary Report • Events Service Charges Report • Events Taxes Report • Events Tender Media Report Most detail reports enable you to drill down to more information.
Comparison Reports	These reports provide information for comparing key performance indicators used in specific events. Comparison reports help you analyze productivity in different revenue centers and plan future events. Parent and child events are shown separately. The following comparison reports include event information: • Events Daily Operations Comparison by Revenue Center (also includes tax information) • Events Store and Date Comparison Report These reports do not enable you to drill down to more information.

Table 51-7 (Cont.) Reporting and Analytics Event Reporting

Report	Description
Menu Engineering Reports	These reports provide information to help you analyze the menu mix, prices, and cost of goods for specific events. Menu engineering reports enable you to increase event revenue by planning menus for subsequent events using menu information from past events. Parent and child events are shown separately. The following menu engineering reports include event information: • Events Menu Engineering Items Summary Report • Menu Engineering by Major and Family Group Reports • Events Item Groups Average Pricing Report • Sales Mix Summary Report • Top Items Summary Report Only the Menu Engineering by Major and Family Group and Events Item Groups Average Pricing reports enable you to drill down to more information.
Employee Reports	These reports provide information about employee performance for specific events. Employee reports help you to select the most productive staff for events and highlight training issues. Parent and child events are shown separately. The following employee reports include event information: • Employee Productivity Report • Events Employee Financial List Report (also includes tax information) • Events Employee Sales Performance Report • Events Tip Track Summary Report • Events Manager Control Report • Events Employee Control Report These reports enable you to drill down to more information.
Events Daily Operations Summary Report	This report provides a summary of the daily operations, including tax information, for one or more events. This report enables you to drill down to more information.
Events Financial Report	This report provides a summary of the daily financials by event. The Events Financial Report shows all tenders, service charges, discounts, taxes, and void activity per revenue center during the event. This report enables you to drill down to more information.

Table 51-7 (Cont.) Reporting and Analytics Event Reporting

Report	Description
Events Consolidated Employee Financial Report by RVC	This report shows a combined view of the employee financials by revenue center for each event. It also shows all tenders, service charges, discounts, taxes, and void activity per revenue center during the event. This report enables you to drill down to more information.
Events Menu Item Report by RVC by Employee	This report provides a summary of the menu item sales by revenue center and by employee for each event. The report shows the revenue center number and name, the employee, menu item, quantity sold, price, sales less item discounts, taxes, and net sales. This report enables you to drill down to more information.
Consolidated Events Employee Meal	This report shows a combined view of the employee meals for an event. The report shows the revenue center, the employee consuming the meal, the check number, the time of the transaction, the menu items, the price when the menu item was ordered, taxes associated with the transaction, net sales of the transaction, and the employee adding the sales. This report enables you to drill down to more information.
Event Consolidated RVC Financial	This report shows a combined view of the revenue center financials by event. The report shows all tenders, service charges, discounts, taxes, net sales, voids, transaction count, and percent of sales per revenue center during the event. This report enables you to drill down to more information.
KDS Reports	These reports provide information to help you analyze the sales mix and labor for specific events. Parent and child events are shown separately. KDS reports help to identify problems with preparation and service times, and improve these times for subsequent events. The following KDS reports include event information: • Events KDS Summary Report • Events Today's KDS Summary Report • Speed of Service Report These reports enable you to drill down to more information.

52

Dining Room Tables and Seating

You can manage the dining room using Simphony with a standard table management interface, or using the enhanced Table Management System.

Standard and Enhanced Table Management

Dining staff can manage tables in Simphony using one of the following methods:

- Standard table management interface
- Enhanced or integrated tables (available with the Table Management System)

The following table outlines the differences between the two table management methods:

Table 52-1 Differences Between Standard and Enhanced Table Management

Function	Standard Tables	Enhanced Tables
Accept reservations	No	Yes
Manage a Reservation List	No	Yes
Manage a Wait List	No	Yes
Provide wait quotes	No	Yes
Show table status	Yes	Yes
Estimate table turn times	No	Yes
Assign tables to sections and employees	No	Yes
Join and split tables	No	Yes
Suggest tables	No	Yes
Use function keys on the workstation for bussing and transferring tables	Yes	No
Interface with Oracle Hospitality Gift and Loyalty Advanced Cloud Service	No	Yes

Configuring the Standard Table Management Interface

1. Select the Enterprise level, click **Setup**, and then click **Interfaces**.
2. Insert a record for Standard Table Management, and then open it in form view.
3. From the **Interface Type** drop-down list, select **3 - Table Management**.
4. From the **Communications Type** drop-down list, select **1 - TCP**.
5. In the **Timeout** field, enter the amount of time (in seconds) that Simphony waits for a response from the standard table management interface before showing a communications failure message.
6. In the **Ping Frequency** field, enter the amount of time (in seconds) that Simphony pings the standard table management server (for example, every 5 seconds).

7. Click the **Options** tab, and then select the appropriate options as described in the following table.

Table 52-2 Standard Table Management Interface Options

Option	Description
2 - Enable Interface Log	Select this option to post debug information to the Interface log file.
5 - ON = Use 9 digits for Terminal IDs; OFF = Use 2 digits for Terminal IDs	Select this option to transmit the entire nine-digit workstation ID to the standard table management system.
8 - Enable Offline Posting	Select this option to allow offline posting to the Simphony POS client.
9 - Determine Link Status Using Ping	Select this option to allow the Simphony POS client to ping the standard table management system.
10 - ON = Use 5-digit RVC #; OFF = Use 3-digit RVC #	Select this option to allow the standard table management system posting message to support a five-digit revenue center number. (Otherwise, the posting is limited to a three-digit revenue center number.)
11 - ON = Use 8-digit Check #; OFF = Use 4-digit Check #	Select this option to allow the standard table management system posting message to support an eight-digit check number. (Otherwise, the posting is limited to a four-digit check number.)

8. In the **TCP Host Name** field, enter the name or IP address of the standard table management server for the interface.
9. In the **Port Number** field, enter `0` (zero).
10. Click the **Properties** tab, and select each property that uses the standard table management system interface.
11. Click the **Service Host** tab, and then select the service host that can run the standard table management system interface.
12. Click **Save**.
13. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
14. Click the **Interfaces** tab.
15. Select the **TMS Operator** to whom a check that is opened by the standard table management system is assigned, before being picked up by a server.
16. Select the **TMS User Workstation** to which a check that is opened by the standard table management system is assigned.
17. From the **TMS Link** drop-down list, select the standard table management interface.
18. Click **Save**.

Creating Standard Dining Tables

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the Front of House page on which to define standard dining tables.

3. On the **Edit** tab, select the page area on which to place the standard dining tables.
4. Select **Other...**, and then select **Dining Table**.
5. Move and adjust the table size on the page. Leave space between tables on the page layout to ensure visibility of indicators and table state. You can increase the grid configuration on the page from 24 (default) to 48 using the **Change Grid Size** link.
6. Repeat Steps 4 and 5 to create additional standard dining tables.
7. Click **Save**.

Configuring the Standard Dining Table Status Set

You can configure a dining table status set to allow workstation operators to manually assign a specific table status value from the set. For example, dining tables could be used to begin new takeout orders. Workstation operators can update the status of the table based upon the readiness of the order (such as Preparing, Ready, or Called Running Late).

This feature is only available with standard dining tables (not enhanced or integrated tables).

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Dining Table Status Set**.
2. Insert a record for the Dining Table Status Set, and then open it in form view.
3. Click **Add**, and then enter or select information for the fields as described in the following table.

Table 52-3 Standard Dining Table Status Set Fields and Options

Field or Option	Description
Name	Enter the name of the dining table status set (for example, waiting or eating).
Override Background Color	Click the ellipsis point (...) button, select the background color, and then click **OK**.
Override Text Color	Click the ellipsis point (...) button, select the text color, and then click **OK**.
Override Image	Click the ellipsis point (...) button, select the image, and then click **OK**.
Option Bits	Click the ellipsis point (...) button, select the appropriate options, and then click **OK**. • **1 - Stretch image to fill area**: If you selected an image, this option determines the image appearance and sizing. • **2 - Show table #/cover count horizontally**: Select this option if you want the table number and cover count to appear horizontally on the table.
Default Index	Enter the default status between 1 and 99. Enter 0 (zero) if you do not want a default table status.
Disabled Index	Do not use this field.
Styling Key	Enter the object key for the dining table status.

4. Repeat Step 3 for each dining table status you want to add.

5. Click **Save**.

Table Management

You can integrate dining room management, reservation list, wait list, customer preferences and seating, and staff availability with the Simphony Table Management System, Reservation List, and Wait List.

The Simphony Table Management System (TMS) allows you to perform the following actions:

- Make reservations
- Maintain a Wait List
- Seat guests immediately at available tables
- Control the number of reservations allowed during specific time periods
- See an overview of enhanced dining tables and status
- Update the table status based on coursing
- Manage the seating layout with table, section, and server assignments
- Change table seating capacities
- Estimate wait quote times

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 the list.

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.

Table Management, Reservation, and Wait List Configuration Prerequisites

Before configuring reservations, you must complete the following tasks:

- Configure the Simphony Table Management System (TMS)
- Configure the Simphony Wait List to accept and seat guests with reservations

If the property is using a Wait List, but does not take reservations, you only need to configure the TMS before setting up the Wait List. (A Reservation List is not required with the Wait List.)

The Simphony TMS, Reservations, and Wait List integrate with loyalty applications such as Oracle Hospitality Gift and Loyalty, and third party loyalty applications based on the loadable loyalty modules. When you use Simphony TMS, Reservations, or Wait List with loyalty

applications, workstation operators can associate the loyalty account with the reservation request or walk-in guest. After associating guest loyalty information with the table request, the information follows the guest through the life of the guest check. To use the Simphony TMS, Reservations, or Wait List with a loyalty application, you must configure the loadable loyalty module. Loyalty Configuration Tasks contains more information about configuring the loyalty module.

Configuring Table Management Privileges

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Guest Management** subtab.
3. Select the appropriate options for the privileges. The following table summarizes the privileges associated with table management functionality and the recommended roles to have the privilege set.

Table 52-4 Table Management Privileges

Tab Location	Option Number	Privilege Name	Allows the Employee to ...	Recommended Roles
Guest Management	32020	Edit Section Layout	Edit a section layout	Host, Manager
Guest Management	32021	Activate Section Layout	Activate a defined section layout as the Active Layout	Host, Manager
Guest Management	32022	Delete Section Layout	Delete an existing section layout	Host, Manager
Guest Management	32031	Assign Employee to Table	Assign an employee to a table or section in TMS	Host, Manager
Guest Management	32032	Mark Table Clean or Dirty	Mark a table as clean or dirty	Host, Manager
Guest Management	32033	Change Table State	Mark tables as being Available, Closed, Reserved, or Merged	Host, Manager
Guest Management	32034	Seat Unsuggested Table	Seat a table request at a table that is different than the table that was suggested by the TMS Table Suggestion System	Host, Manager
Guest Management	32037	View Legend	View the TMS Legend and use the available functions contained within the form	Host, Manager

Table 52-4 (Cont.) Table Management Privileges

Tab Location	Option Number	Privilege Name	Allows the Employee to ...	Recommended Roles
Guest Management	32038	Allow Seating Guest Above or Below Table Capacity	Seat a table request at a table that does not support a different seating capacity (other than the cover count on the table seating request)	Host, Manager
Guest Management	32039	Allow Seating Guest at Table that does not Meet all Required Table Preferences	Seat a table request at a table that does not meet all of the seating preferences defined on the table seating request	Host, Manager
Guest Management	32040	Edit Server Availability	Edit the server availability	Host, Manager
Ad Hoc Reports	31044	Run Employee Section Assignment Report	Run the Employee Section Assignment Report	Host, Manager
Transactions	22	Post Payment to Checks Belonging to Another Operator	Unseat a table request	Host, Manager
Transactions	37	Authorize/ Perform Posting of Payment	Unseat a table request	Host, Manager
Transactions	38	Authorize/ Perform Closing of Checks with a Zero Balance	Unseat a table request	Host, Manager
Guest Checks	18	Authorize/ Perform Pickup of a Check Belonging to Another Operator	Unseat a table request	Host, Manager

4. Click **Save**.

Configuring Reservation Privileges

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Guest Management** subtab.

3. Select the appropriate options for the privileges. The following table summarizes the privileges associated with reservation functionality and the recommended roles to have the privilege set:

Table 52-5 Reservation Privileges

Option Number	Privilege Name	Allow the Employee to ...	Recommended Roles
32006	Greet Wait List Entry	Greet a reservation request if the party arrives earlier than the time at which the reservation automatically moves to the Wait List	Host, Manager
32007	Mark as No Show	Mark a reservation request as a no-show if the guest does not arrive	Host, Manager
32010	Add Reservation Entry	Create a reservation request	Host, Manager
32011	Edit Reservation Entry	Edit an existing reservation request	Host, Manager
32012	Cancel Reservation Entry	Cancel a reservation request	Host, Manager
32013	Approve Reservation Entry	Approve a reservation that is requesting a date or time outside the acceptable or allowable timeframe	Host, Manager

4. Click **Save**.

Configuring Wait List Privileges

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Select the role type, click the **Operations** tab, and then click the **Guest Management** subtab.
3. Select the appropriate options for the privileges.

   The following table summarizes the privileges associated with wait list functionality and the recommended roles to have the privilege set:

Table 52-6 Wait List Privileges

Option Number	Privilege Name	Allow the Employee to ...	Recommended Roles
32001	Add Wait List Entry	Create a new Wait List request	Host, Manager
32002	Edit Wait List Entry	Edit an existing Wait List request	Host, Manager
32003	Abandon Wait List Entry	Abandon a Wait List request	Host, Manager

Table 52-6 (Cont.) Wait List Privileges

Option Number	Privilege Name	Allow the Employee to ...	Recommended Roles
32004	Seat Wait List Entry	Seat a Wait List request	Host, Manager
32005	Unseat Wait List Entry	Unseat a Wait List request	Host, Manager
32006	Greet Wait List Entry	Greet a Wait List request	Host, Manager
32007	Mark as No Show	Mark a reservation request as a no-show if the guest does not arrive	Host, Manager

4. Click **Save**.

Configuring Servers for Table Management

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Search for and select the employee record.
3. In the **Check Name** field, enter the server's name as you want it to appear on the workstation. If you do not enter a **Check Name**, the workstation shows a blank name.
4. Click the **Operator Records** subtab near the lower area of the screen.
5. In the **TMS Color** field, select the color to distinguish the server from other servers on the host page, and then click **OK**.

   Although you can set a different color for each revenue center within a property, Oracle recommends that you use a single color for the server across the property. If you do not set a TMS Color, the workstation shows white.
6. In the **Server Efficiency** field, enter **0** (zero) if you want the Simphony TMS to ignore the server in the table suggestions.

   The Table Suggestion System (within TMS) sets the **Server Efficiency** rating to determine the next table recommended for seating. This rating is a value between 0 (zero) and 100, and represents the number of covers that the server can efficiently service at one time.
7. Click **Save**.

Configuring Properties for Table Management

1. Select the property, click **Setup**, and then click **Properties**.
2. Highlight the property record.
3. In the **Simphony Platform** field, select **2 - Extensible Clients and Architecture**.
4. Click **Save**.

Configuring Custom Images for Table Management

You can load custom images into the Simphony application to represent table seating configuration and statuses. The TMS uses both custom images and images packaged with Simphony. All images are transparent Portable Network Graphics (PNG) files.

Table images show a graphical representation of the table and chairs. These images can be a square or round table surrounded by any number of chairs.

Table decorators show a graphical representation of the table status (for example, dirty, closed, or reserved).

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Content**.
2. Double-click the content name row to view the image set for that name.
3. Click the **Import from a file** link to import custom images.
4. Browse to the file location, select the image file, and then click **Open**.
5. Repeat Steps 2 through 4 to import each table image and table decorator.
6. Click **Save**.

Configuring KDS or Dining Course Colors and Images for Table Management

You can set a color or image to indicate the KDS or dining course that the table is being serviced under.

1. Select the Enterprise or property, click **Descriptors**, and then click **KDS/Dining Course**.
2. Insert dining course records if they do not exist.
3. In the **Course Color** field, select a color for each dining course name.

   This color appears as the dining course indicator on the table image in the workstation. For example, appetizers can be green, entrées can be yellow, and desserts can be red.
4. (Optional) From the **Course Image Name** field, select a the course decorator image to represent the dining course (in place of a course color). The image you select replaces the default Occupied image on the table. To remove a Course Image that was previously set, select **0 - None**, and then click **OK**.
5. Click **Save**.

Configuring Dining Course Pacing

You can set the pace at which Simphony sends dining courses to the kitchen. This feature only works for menu items that have KDS prep times configured.

1. In the EMC, select the Enterprise, or property, click **Descriptors**, and then click **KDS/Dining Course**.
2. Insert a dining course record if it does not exist, and then enter the following information:
   - **Initial Course Min Prep Time**: Enter the target done time for the course.

     For example, if you enter 10 minutes and an item with a prep time of 6 minutes is sent to the kitchen, it will not fire to Prep Stations until 4 minutes have elapsed. If an item

with a prep time of more than 10 minutes or without any prep time is sent to the kitchen, it will fire immediately. The timer for the next course does not start until this time is exceeded.

- **Min Prep Time**: Enter the minimum amount of time that the KDS Controller should wait before sending the next course to the kitchen after the current course is bumped from all Prep Stations. This option is not applicable to the first dining course.
- **Max Prep Time**: Enter the maximum amount of time that the KDS Controller should wait before sending the next course to the kitchen after the current course is bumped from all Prep Stations.

3. Click **Save**.

Configuring the Service Total Tender for Table Management

You can configure a unique service total tender media record to process seating and unseating of guests.

1. Select the Enterprise, click **Configuration**, and then click **Tender/Media**.
2. Create a tender media record, and then name it **TMS**.
3. Double-click the record to open it.
4. From the **Key Type** drop-down list, select **2 - Service Total**.
5. Click **Save**.

Enhanced Dining Tables

Complete the following tasks to set up enhanced dining tables:

- Set Dining Table Classes
- Set Enhanced Dining Table Attributes
- Configure Enhanced Tables

Setting Dining Table Classes

You can group and configure similar tables into a dining table class.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Dining Table Class**.
2. Insert a dining table class.
3. Select or enter information for the following fields.

Table 52-7 Dining Table Class Fields

Field	Description
Name	Enter the name of the dining table class. The name identifies the class (for example, 2 Tops, 4 Tops, and so on).

Table 52-7 (Cont.) Dining Table Class Fields

Field	Description
(Optional) Default Background Color	Select a background color to represent the table. Select a different color than the page background so as not to blend similar colors. If you associate a transparent table image with the dining table class, the background color appears with the image. If you select **0 - None**, the application shows the table image and background color of the page.
(Optional) Default Text Color	Select the text color to represent the table number or name. Select a different color than the page background so as not to blend similar colors. If you select **0 - None**, the application shows the default text color of black.
(Optional) Default Image	Select the image to represent the table.
Minimum Covers	Enter the lowest number of covers that the dining table class can accommodate (for example, a 2-Top can accommodate a minimum of 1 person).
Maximum Covers	Enter the largest number of covers that the dining table class can accommodate (for example, a 2-Top can accommodate a maximum of 2 people). You can overlap covers to seat a specific cover count within one or more dining table classes (for example, 4 covers on a 4-Top or 6-Top).
Options	If you are using enhanced dining tables within the dining table class, select **1 - Enhanced Dining Table**. If you are using legacy standard tables, deselect Enhancement Dining Table.

4. Click **Save**.

Setting Enhanced Dining Table Attributes

You can set characteristics of the table for use in the table suggestion process.

1. Select the property, click **Setup**, and then click **TMS Table Attributes**.
2. Select or enter information for the following fields.

Table 52-8 TMS Table Attributes Fields

Field	Description
Name	Enter the name of the attribute, characteristic, or guest preference associated with a table (for example, Accessible, Window Seats, City View, Ocean View, or Booth).
Code	Enter the attribute code associated with a guest preference in the request (for example, ADA, WIND, CITY, OCN, or BTH).

Table 52-8 (Cont.) TMS Table Attributes Fields

Field	Description
(Optional) Is Exclusive	Select this option if the table attributes must be met before being included in table seating suggestions. For example, the Accessible attribute is exclusive.

3. Click **Save**.

Configuring Enhanced Dining Tables

Dining tables represent the physical location where a party can be seated with a Quick Seating operation or from the Wait List.

1. Select the property, click **Setup**, and then click **Tables**.
2. Select or enter information for the following fields.

Table 52-9 Tables Fields

Field	Description
Table Number (# symbol)	Enter a unique table number for all revenue centers within the property. The Table Number appears on the workstation and represents the internal number used to distinguish one table from another within the property.
Name	Enter a unique table name for all revenue centers within the property. The table name appears on the workstation and represents the local facing name or number used to differentiate the table from others. Values in the Name field can be: • All numeric • All alpha • Alpha and then numeric

Table 52-9 (Cont.) Tables Fields

Field	Description
Class	Select the dining table class. The dining table class defines the type of table. All instances of this table number use the color, image, and cover configurations defined for the selected dining table class. Create only tables that are to be used for seating within a revenue center. Creating non-seatable tables (such as bar tabs) prevents the table suggestion system from properly distributing tables. Do not delete tables unless you no longer need them for reports. Oracle Hospitality recommends that you assign tables that are not used to a dining table class named to indicate this status. For example, create a dining table class named NOT IN USE and assign unused tables to this class. Tables assigned to the NOT IN USE class cannot be used for seating, but remain in the Simphony TMS for reporting purposes.
Table Attributes	Click the **Add** link to associate one or more attributes with a table. When you set attributes, the application matches guest preferences with tables. For example, when a guest prefers window seats, tables associated with a window seating attribute move up in the table suggestion process.
Mergeable Tables	Click the **Add** link to add the tables that workstation operators can select for merging with the selected table. Click the **Delete** link to remove tables from the mergeable table assignment. Select **None** in the record or leave the Mergeable Tables section empty to indicate that the selected table has no merge restrictions and it can be merged with any table.

3. Click **Save**.

Setting Table Decorator Images

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **TMS Parameters**.
2. (Optional) Click the link next to each Dining Table Decoration Image Name to view a list of images (set as custom images).

   Dining table images are optional but useful as part of daily table management operations. Configuring Custom Images for Table Management contains more information about setting custom images.
3. Select an image to represent each of the following statuses:

Table 52-10 Dining Table Decoration Images

Table Status	Description
Select	The application uses this decorator when a workstation operator selects one or more tables. Table selection is only available on a page with the Host Command Area. Table selection allows the workstation operator to apply a specific action to the selected tables.
Dirty	The application uses this decorator when a table is in a status of Dirty. Workstation operators can still seat guests at dirty tables.
Seated	The application uses this decorator when a guest is newly seated at a table. This status remains until the guest places an order. After placing an order, the table status changes to Occupied.
Occupied	The application uses this decorator after a guest places an order at the table. This status remains until the guest tenders the check. The image associated with the Occupied status is overridden when you set images for dining courses. Configuring KDS or Dining Course Colors and Images for Table Management contains more information about setting dining course images.
Printed	The application uses this decorator when the workstation operator prints the guest check. The table is considered occupied, and the Printed status appears in addition to the Occupied status.
Paid	The application uses this decorator after a guest completes the dining experience and tenders the check. This status remains for the duration of time set in the Auto Reset Paid Status (Minutes) field. Host staff can seat new guests at tables marked as Paid. After a host seats a guest at a Paid table, the table status resets.
Parent	The application uses this decorator to identify the table as the parent table in a merged table grouping. This status appears in addition to the other status indicators.
Child	The application uses this decorator to identify the table as the child table in a merged table grouping. This decorator includes a text overlay that identifies the child's parent table number and name. The application clears both Parent and Child decorators when the workstation operator removes the merged table grouping.
Closed	The application uses this decorator to indicate a status of Closed. Host staff cannot seat guests at closed tables.

Table 52-10 (Cont.) Dining Table Decoration Images

Table Status	Description
Reserved	The application uses this decorator to indicate a status of Reserved. The Table Suggestion process does not consider reserved tables for seating.
User Suggested	The application uses this decorator to identify the table as the host staff recommended seating placement for the highlighted table request on the Wait List.
System Suggested	The application uses this decorator to identify the table as the system recommended seating placement for the highlighted table request on the Wait List.
Highlighted	Do not use this decorator.
Host Area	This image is not a table decorator, but an optional image placement for the Host Command Area. You can use this image to place the restaurant logo on the host page.

4. Click **Save**.

Configuring Server and Table Availability

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **TMS Parameters**.
2. Click the **Configuration** tab, and then click the **Table Suggestion** subtab.
3. In the **Default Server Available Time (Minutes)** field, enter the default number of minutes to use when making a server unavailable in the TMS. You can set this to a duration between 1 and 480 minutes.
4. In the **Auto Reset Paid Status (Minutes)** field, enter the number of minutes that the table decorator shows as paid on the host page before returning to an available status. You can define a buffer of time between when the table service moves from tendered, cleaned, and available for a new seating. Setting a value of 0 (zero) or blank defaults the time to 1 minute.
5. Click **Save**.

Setting Table Management Options

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **TMS Parameters**.
2. On the **Configuration** tab, select **Enable Table Management** to turn on TMS functions in Simphony.

   Select this option only for properties and revenue centers that use the TMS features. This option increases workstation resources and communications bandwidth for the Enterprise.
3. If you are using a loyalty program to look up and process transactions, select the **Loyalty Module ID** from the drop-down list. If you are not using a loyalty program, select **None**.
4. Select the appropriate TMS Options in the lower area of the screen. The following table describes the options.

Table 52-11 TMS Options

Option	Description
Close Unassigned Tables on Section Layout Activation	Select this option to automatically close tables that are not assigned to a section when a workstation operator activates a section layout.
Allow Multiple Loyalty Accounts per Guest Check	Select this option to allow the workstation operator to associate additional loyalty accounts with the guest check by selecting seats. Deselect this option to limit one loyalty account per guest check. This option determines whether the workstation operator can associate multiple loyalty accounts with a guest check.
Enable Guest Information Chit Printing	Select this option to print a chit when the host staff seats the table request.
Update Table On KDS Bump Event	Select this option to update the KDS or dining course on the table image after the workstation operator bumps the menu from the KDS. Deselect this option to update the KDS or dining course on the table image after the workstation operator performs a service total. Select this option only when the property or revenue center uses a Kitchen Display System (KDS). This option determines when the dining course updates on the host page table image.
Prompt for Employee on Unassigned Table	Select this option to have the workstation operator assign a server during seating. This option determines whether the host staff can seat a table without a server assignment.
Enable Seating Of Unavailable Tables	Select this option to allow the host staff to seat guests at a table defined as unavailable (including Closed, Dirty, and Reserved).
Ignore Cover Count	Select this option to maintain a valid cover count for the seating record while incrementing the guest count from 0 (zero) to a number based on the menu items ordered (entrée count). This option determines the initial guest count set on the guest check when the host staff seats the table request. Select this option if you do not want the cover count shown on the guest check; instead the application relies on guest check configuration to determine the guest count value. Deselect this option to have the cover count set on the table request and provided to the guest check as the initial guest count. When you select **Ignore Cover Count**, you must also deselect the option **Use Number of Seats for Guest Count** from the RVC Parameters module.

Table 52-11 (Cont.) TMS Options

Option	Description
Enable Edit Seating Capacity	Select this option to allow the workstation operator to change the seating capacity of a table from its configured number of seats.
Set Seating Capacity on Table Merge	Select this option to have the workstation operator enter the new number of seats for a table when merging tables.
Enable Create and Edit buttons on Wait List and Reservation List Screens	Select this option to show the **Create** and **Edit** buttons on the POS client Wait List and Reservation List screens. The workstation operator can click the buttons in the POS client (rather than double-tap the Reservation List or Wait List).
Enable Offline Reservations	Select this option to allow workstation operators to create reservations when connectivity to the Table Management Service is not available. This is primarily used at properties when the host workstations are unable to access the service but want to create reservations. Setting this option does not restrict the workstation operator's ability to add records to the Wait List. When you enable offline reservations, the potential to overbook seating increases as the reservations are not recorded to a single destination. After the application re-establishes connectivity to the service, the application reports offline reservations to the service. If the remaining inventory becomes zero, the offline reservations being reported to the service are removed without notification. In cases where more than one source of reservations are defined (for example, multiple hosting workstations or online reservations), Oracle Hospitality discourages use of this option. Oracle Hospitality recommends that you disable offline reservations.

5. Click **Save**.

Configuring Table Suggestion Factors

The Table Suggestion process uses several optional factors to determine the next parties to seat, and the tables that the TMS suggests for seating. Although the table suggestion factors all work together, Oracle Hospitality recommends that you use only a few factors initially to become accustomed to how the listing and suggestion process works for the property.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **TMS Parameters**.
2. Click the **Table Suggestion** tab.
3. Use the arrow buttons to move and rank the suggestion factors. The factor order alters the table suggestion calculations.

Table 52-12 Table Suggestion Factors

Table Suggestion Factor	Places a Greater Value On ...
Reservation Waiting	Reservations that have been waiting longer than other requests in the seating order
Waiting Past Quote	Reservation or walk-in requests where the request has been waiting longer than their scheduled seating time or quoted wait time
Reservation Waiting Past Quote	Reservation requests where the request has been waiting longer than the scheduled seating time
Reservation Greeted	Reservation requests where the party has arrived and hosting staff greeted them
Reservation	Reservation requests versus non-reservation requests (walk-ins) in the seating order
VIP Waiting	Reservation requests where the party is designated as a VIP and have been waiting versus non-VIP reservation and walk-in requests that have been waiting in the seating order
VIP	Reservation and walk-in requests where the party is designated as a VIP in the seating order
Table Dirty	Any table marked as Dirty
Table Paid	Any table marked as Paid
Server Check Count	Any server based on their current service check count (open and closed)
Server Cover Count	Any server based on their current service cover count
Server Efficiency	Any server based on their Server Efficiency Rating
Server Last Assigned	Any table based on the table's current server assignment and the time since the server received a new table seating

4. Click **Save**.

Table Management Alerts

You can set two optional types of table management alerts: Service Alerts and Check Alerts.

Service Alerts show the duration since the last service interaction (for example, guest ordered a menu item). If you do not set Service Alerts, the table management system does not track service intervals on the guest check.

Check Alerts show how long the guest has been seated at the table. This alert changes as the service interaction passes defined thresholds. If you do not set Check Alerts, the table management system only tracks the duration of time the guest check is open and does not change the Check Alert color.

Configuring Alerts

1. Select the revenue center, click **Setup**, and then click **Service Alert**.

2. Enter the name of the service alert as you want it to appear to the workstation operator (for example, Recent Service, No Touch Warning, or Service Warning).
3. Set the **Service Alert Time** to the number of minutes since the last service total elapses before triggering the service alert.

   To start the alert immediately upon seating of the guest, set the time to 0 (zero). The application resets the timer to 0 when the workstation operator performs a service total with a new menu item on the guest check.
4. Select the **Service Alert Color** to distinguish one alert from another in the service alert table area on the host page. Only seated tables show a service alert color.
5. Click **Save**.
6. Select the revenue center, click **Setup**, and then click **Check Alert**.
7. Enter the name of the check alert as you want it to appear to the workstation operator (for example, In Service, Turn Waiting, or Turn Alert).
8. Set the **Check Alert Time** to the number of minutes since the check was opened before triggering the next check alert.

   To start the alert immediately upon seating of the guest, set the time to 0 (zero). The application resets the timer to 0 when the workstation operator performs a service total with a new menu item on the guest check. The check alert remains as the last alert until the workstation operator closes the guest check.
9. Select the **Check Alert Color** to distinguish one alert from another in the check alert table area on the host page. Only seated tables show a check alert color.
10. Click **Save**.

Table Management Sections

You can group tables within an area or station to indicate assignment to a specific server. Optional seating section templates allow you to set predefined table layouts where the application automatically assigns tables to a specific section. You can create seating section layouts at the property level.

Configuring Sections

1. Select the property, click **Setup**, and then click **Section**.
2. Enter the name of the section as you want it to appear to the workstation operator and in reports.
3. Select the color used to distinguish one section from another when viewing tables on the host page.

   Only tables that are assigned to a section inherit the section color.
4. Click **Save**.
5. Select the property, click **Setup**, and then click **Seating Section Templates**.
6. Enter the name of the section template as you want it to appear to the workstation operator.
7. Select **Add** to define a table as part of the template.
   a. From the new record, click the build box to view a list of tables defined for the revenue center. Alternatively, you can enter the **Table ID**, and then press the **Tab** key.

b. Select the section from the available list or enter the **Section ID**.

8. Click **Save**.

Creating the Touchscreen Reservation List

The Reservation List allows hosting staff to manage all reservation requests. Oracle recommends that you create a Reservations List on a page for the reservation functions. You can use the template provided in Simphony. If a property uses future reservations or multiple dining room layouts, a Tabbed Template provides workstation operators with a smoother means to navigate between wait lists, reservation lists, and table layouts.

The Table Management System (TMS), Wait List, and Reservation functions must reside within the same content area on a page in order to interact.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the page on which to place the Reservation List.
3. On the **Edit** tab, select the page area in which to define the reservations.
4. Click **Other...**, select **Table Management**, and then select **Reservation Area**.

   The Reservation List contains buttons for creating future reservations. You can place the Reservation List alone or within the Host Command Area, where hosting staff can hide and recall it. Oracle Hospitality recommends placing the Reservation List on its own page. After placing the reservation area, the Reservation List settings appear in two sections:

   - **Reservation List Columns**: The columns section allows you to set Reservation List columns and formats that appear on the POS client. You can configure the content, width, and order in which the columns appear on the Reservation List.
   - **Summary Area**: The summary section allows you to set the reservation details that appear on the POS client when a workstation operator highlights a reservation in the Reservation List.
5. Highlight the reservation area, and then select **Reservation List Columns**.
6. In the **Header** and **Detail Font Size** fields, select the size of the font used to show the reservation heading and detail.
7. For each Reservation List column, select the **Enable** option if you want the column name to appear in the POS client Reservation List, and then enter the column width for each column.

Table 52-13 Reservation List Columns

Column Name	Description
Cancel Date	If a reservation is cancelled or the guest does not arrive, this column shows the date and time of cancellation.
Alert Icon	The alert icon is always enabled and is the first column shown in the Reservation List. This column contains icons to indicate status or properties of the reservation record. Alert icons represent the request method, VIP status, and seating preferences.

Table 52-13 (Cont.) Reservation List Columns

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 covers for the reservation.
Created	This column shows the date and time the reservation was created.
Greeted	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.
Guest Name	This column shows the name in which the reservation was created.
Pager Number	Do not use this column.
Phone Number	This column shows the guest's phone number.
Request Method	This column shows an icon representing the source of the reservation (phone or Internet).
VIP	This column shows an icon representing the VIP flag if the guest has a VIP status.
Wait Quote	Do not use this column.

8. Click the black up and down arrows in the top portion of the Reservation List Columns section to sort and move each enabled column to the order of appearance in the POS client Reservation List.
9. Select **Summary Area**.
10. Select **Show Summary** to show reservation details in the Reservation List when a workstation operator highlights a reservation.
11. In the **Summary Height** field, enter a static height for the summary information.

    When you enter 0 (zero), the height of the summary area appears dynamically, depending on the amount of content and details associated with the highlighted reservation.
12. In the **Label** and **Detail Font Size** fields, select the size of the font used to show the summary label and details.
13. For each Reservation summary field:
    - Select the **Enable** option to show summary content in the POS client Reservation List.
    - Select the **New Line** option to show summary information on a new line in the POS client Reservation List.

    The information in the Summary Area is the same as the Reservation List Columns, with the addition of the content listed in the following table.

Table 52-14 Reservation List Summary

Summary Content	Description
Notes	This summary option contains text included in the Notes field of the reservation record. This field holds up to 255 characters of text and automatically wraps in the summary area.
Referral Notes	This summary option contains text included in the Referral Notes field of the reservation record. This field holds up to 255 characters of text and automatically wraps in the summary area.

14. Click **Save**.

Creating the Touchscreen Wait List

The Wait List allows hosting staff to manage all table requests (including walk-ins and pending reservations). Oracle Hospitality recommends that you create a Wait List on a page for the table request functions. You can use the templates provided in Simphony. If the property uses future reservations or multiple dining room layouts, a Tabbed Template provides workstation operators with a smoother means to navigate between wait lists, reservation lists, and table layouts.

The Table Management System (TMS), Wait List, and Reservation functions must reside within the same content area on a page in order to interact.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the page on which to place the Wait List.
3. On the **Edit** tab, select the page area in which to define the Wait List.
4. Click **Other...**, select **Table Management**, and then select **Wait List**.

   The Wait List contains buttons for creating walk-in table requests. You can place the Wait List alone or within the Host Command Area, where hosting staff can hide and recall it. Oracle recommends creating a Wait List on the same page as the tables to simplify the seating process. After placing the wait list, the Wait List settings appear in two sections:

   - **Wait List Columns**: The columns section allows you to set Wait List columns and formats that appear on the POS client. You can configure the content, width, and order in which the columns appear on the Wait List.
   - **Summary Area**: The summary section allows you to set the wait list details that appear on the POS client when a workstation operator highlights a table request in the Wait List.
5. Highlight the **Wait List**, and then select **Wait List Columns**.
6. From the **Header** and the **Detail** fields, select the size of the font used to show the Wait List heading and detail.
7. For each Wait List column, select the **Enable** option to have the column name appear in the workstation Wait List, and then enter the column width for each column.

Table 52-15 Wait List Columns

Column Name	Description
Abandon Time	Do not configure the Wait List to contain this column.
Alert Icon	The alert icon is always enabled and is the first column shown in the Wait List. This column contains icons to indicate status or properties of the table request record. Alert icons represent the quote status, request method, VIP status, and seating preferences.
Confirmation Number	The confirmation number appears only for table requests that originate from the Reservation List.
Covers	This column shows the number of covers for the table request.
Created	This column shows the date and time the table request was created.
Greeted	This column shows the time when the host staff greeted the guest.
Guest Name	This column shows the name for the table request.
Pager Number	This column shows the pager number for the table request.
Phone Number	This column shows the guest's phone number.
Request Method	This column shows an icon representing the source of the table request (walk-in, phone-in, or Internet).
VIP	This column shows an icon representing the VIP flag if the guest has a VIP status.
Wait Quote	This column shows the estimated wait quote time given for the table request.

8. Click the black up and down arrows in the top portion of the Wait List Columns section to sort and move each enabled column to the order of appearance in the POS client Wait List.
9. Select **Summary Area**.
10. Select **Show Summary** to show table request details in the Wait List when a workstation operator highlights a table request.
11. In the **Summary Height** field, enter a static height for the summary information.

    When you enter 0 (zero), the height of the summary area appears dynamically, depending on the amount of content and details associated with the highlighted table request.
12. From the **Label** and **Detail** fields, select the size of the font used to show the summary label and details.
13. For each Wait List summary field:
    - Select the **Enable** option to have the summary content appear in the POS client Wait List.
    - Select the **New Line** option to have the summary information appear on a new line in the POS client Wait List.

The information in the Summary Area is the same as the Wait List Columns, with the addition of the content listed in the following table.

Table 52-16 Wait List Summary

Summary Content	Description
Estimated Wait Time	This summary option contains the approximate time remaining until a table will be ready for the guest. This value differs from the wait quote, which is a static amount of time that the guest was quoted. The Estimated Wait Time changes as tables are freed up and new table seating requests are made.
Notes	This summary option contains text included in the Notes field of the table request record. This field holds up to 255 characters of text and automatically wraps in the summary area.
Referral Notes	This summary option contains text included in the Referral Notes field of the table request record. This field holds up to 255 characters of text and automatically wraps in the summary area.

14. Click **Save**.

Touchscreen Page Table Management Tasks

Oracle Hospitality recommends that you create table management forms on a page for the enhanced dining table functions. You can use the templates provided in Simphony. If the property uses future reservations or multiple dining room layouts, a Tabbed Template provides workstation operators with a smoother means to navigate between wait lists, reservation lists, and table layouts.

The Table Management System (TMS), Wait List, and Reservation functions must reside within the same content area on a page in order to interact.

Creating table management operations for the touchscreen page consists of completing the following tasks:

- Setting the Host Command Area
- Setting the Dining Table Status
- Setting Employee Lines
- Creating a Section Layout
- Creating Enhanced Dining Tables
- Setting Table Management Functions in the Guest Check Detail Area
- Creating a button for the Employee Section Assignment Report

Host Command Area

You need to place a Host Command Area on a page for hosting staff to use the Simphony TMS operations. The Host Command Area is the primary mechanism used to manage all hosting related functions in the TMS. This area determines the way hosting staff:

- Enables and disables TMS functions
- Accesses TMS features
- Administers the hosting page

Configuring the Host Command Area

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the page on which to define the Host Command Area.
3. On the **Edit** tab, select the page area on which to place the Host Command Area. You must place the Host Command Area in the same content area on the page as the tables in order for the host features to function.
4. Click **Other...**, select **Table Management**, and then select **Host Command Area**.

   Hosting staff performs a long button press on the Host Command Area to access the TMS functions. As such, carefully consider the Host Command Area sizing and placement to ensure that hosting staff can easily see and press this area on the POS client.

   The Host Command Area can optionally show an image in place of the silver portion of the area. You can set the image from the TMS Parameters module as the Dining Table Decoration Image Name. The image you select scales to the size of the Host Command Area.
5. Click **Save**.

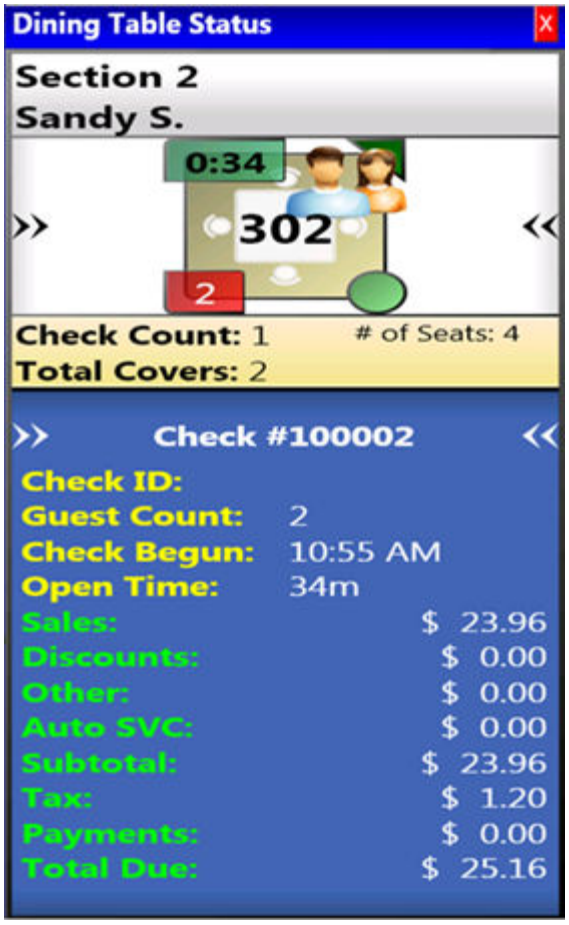
Dining Table Status

Dining Table Status contains information about the highlighted table and associated open checks. Hosting staff can hide and recall the optional Dining Table Status from the Host Command Area, as well as move the Dining Table Status on the workstation with a click, hold, and drag motion. The sizing and placement of the Dining Table Status should not prevent hosting staff from accessing the table images. In addition, the Dining Table Status should be large enough so that text is legible to all hosting staff as the text size scales based on the screen sizing.

> **Note:**
>
> Tax amount values are not shown on the Dining Table Status summary detail section if the revenue center utilizing the Table Management interface is configured to use Value Added Tax (VAT) settings.

The following figure shows an example of the Dining Table Status.

Figure 52-1 Dining Table Status



Configuring the Dining Table Status

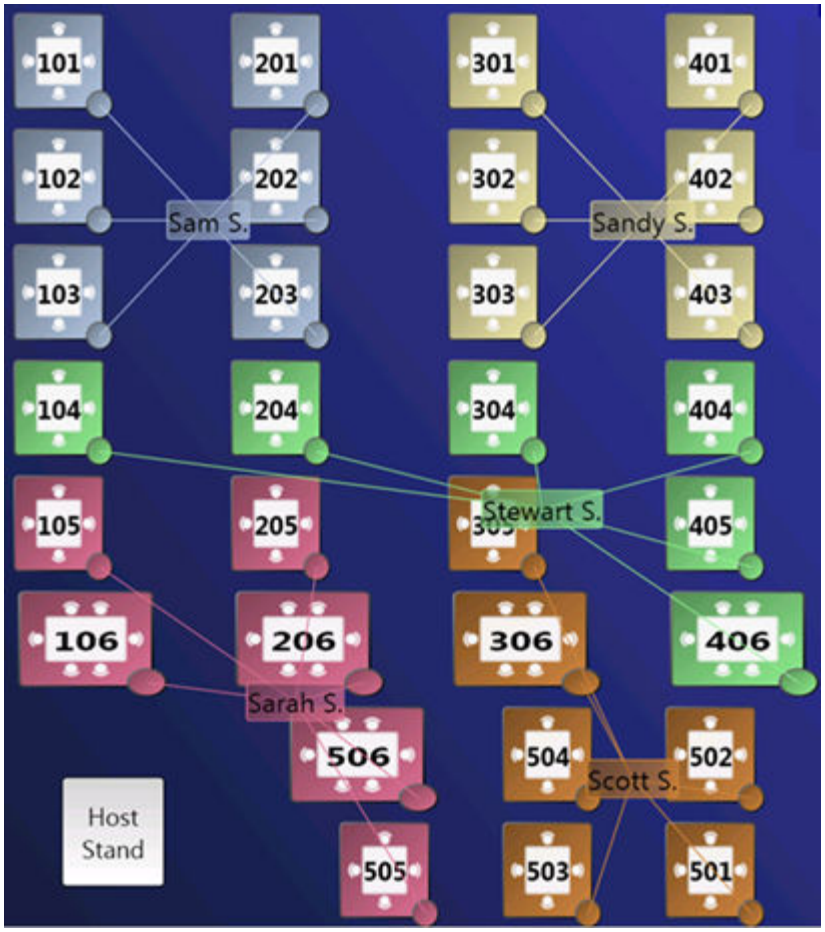
1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the Front of House page on which to define the Dining Table Status.
3. On the **Edit** tab, select the page area on which to place the Dining Table Status.

   Place the Dining Table Status in the same content area on the page as the Host Command Area and tables so that hosting staff can access the functions and view information.
4. Click **Other...**, select **Table Management**, and then select **Dining Table Status**.
5. Click **Save**.

Employee Lines

Hosting staff can hide and recall the optional Employee Lines Area from the Host Command Area. This area shows lines from the assigned tables to a text box containing the assigned server's name. The following figure shows an example of the Employee Lines Area.

Figure 52-2 Employee Lines Area



Configuring Employee Lines

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the page on which to define the Employee Lines Area. (This is the page with enhanced table images.)
3. On the **Edit** tab, select the page area on which to place the Employee Lines Area.

   Place the Employee Lines Area in the same content area on the page as the Host Command Area and tables in order for the hosting staff to access the functions and view information.
4. Click **Other...**, select **Table Management**, and then select **Employee Lines Area**.
5. Adjust the size and placement of the Employee Lines Area to ensure that it covers all enhanced tables on the page. Tables that are not covered by the Employee Lines Area do not show server assignment lines.
6. Click **Save**.

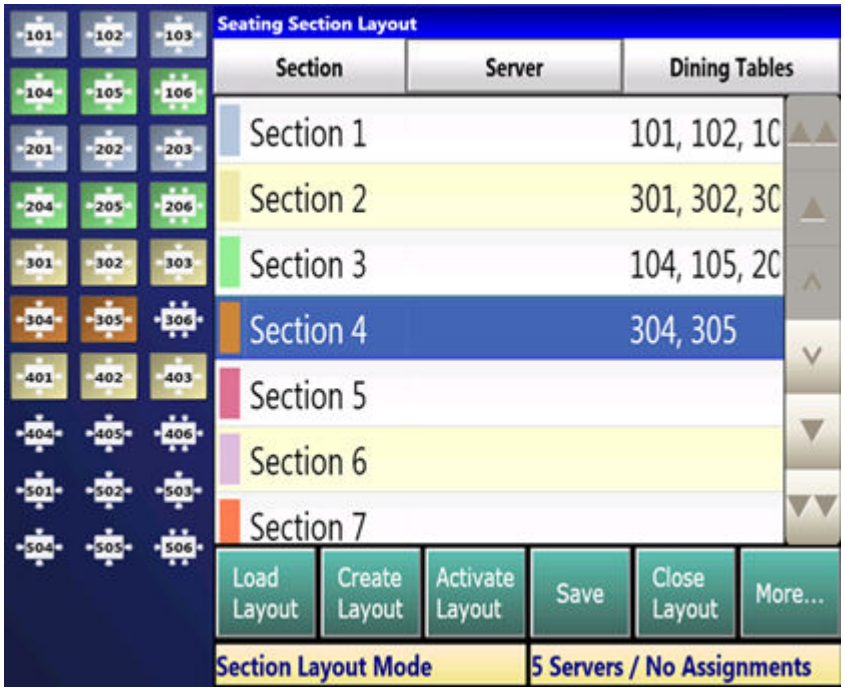
Section Layout

The Section Layout contains controls to create and administer Seating Section Layouts for table, section, and server assignments. Hosting staff can hide and recall the optional Section Layout from the Host Command Area or from a separate page. Oracle Hospitality recommends creating a Section Layout on a separate page. Hosting staff can easily assign tables to a section when:

- Tables are present on the same page as the Section Layout.
- Tables are accessible while editing a Section Layout.

The following figure shows an example of the Section Layout.

Figure 52-3 Section Layout



Creating a Section Layout

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Create the page on which to define the Section Layout.
3. Click **Other...**, select **Table Management**, and then select **Section Layout**.
4. Adjust the Section Layout size to ensure that the text is visible to hosting staff. The text size scales with the Section Layout size.
5. Click **Save**.

Creating Enhanced Dining Tables

You can use all functions of the Simphony TMS using enhanced dining tables. You cannot use legacy standard tables with TMS. Enhanced dining tables show overlays on the outer edges of the table that indicate status, coursing, and alerts.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the page on which to define enhanced dining tables.
3. On the **Edit** tab, select the page area on which to place the enhanced dining tables.
4. Click **Other...**, select **Table Management**, and then select **Dining Table (Enhanced)**.
5. Move and adjust the table size on the page. Leave space between tables on the page layout to ensure visibility of indicators and table state. You can increase the grid configuration on the page from 24 (default) to 48 using the Change Grid Size link.
6. Set the unique properties of the enhanced dining table:
   a. Enter the table number in the **Table #** field.

      This number must match the **Table Number** set in the Tables module. See Configuring Enhanced Dining Tables for more information.

   b. From the Next Page/Panel section, click the black Panel arrow, and then select the host page from the list.

   c. (Optional) Enter a table number in the **Legend** field.

      If the Legend is blank, the table number or name shown on the host page uses the table number or name defined for the **Table #** field. To use a different name or number for the table, enter an override value in the Legend field.
7. Repeat Steps 4 through 6 to create additional enhanced dining tables.
8. Click **Save**.

Setting Table Management Functions in Check Detail

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Double-click the page that contains the Check Detail area.
3. Select the **Check Detail** area on the page.
4. Select **Show Seat Number** to provide the workstation operator with a visual representation of the seat number associated with a menu item or guest on the check detail area.
5. Select **Enable Gestures** to allow the workstation operator to access a menu of options when long-pressing on the guest check.

   The long-press options include:

   - Change Item Seat
   - Change Item Course
   - View By Item Entry
   - View By Seat
   - View By Course

6. Select the view mode from the **Initial View Mode** drop-down list.

   This is the view shown when the workstation operator initially sees the guest check. Oracle recommends selecting the **View By Seat** mode for restaurants that allow multiple loyalty accounts on a single guest check.

7. Click **Save**.

Creating the Employee Section Assignment Report Button

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the Employee Section Assignment Report button.
3. On the **Edit** tab, select the page area in which to define the button.
4. Click **Button**.
5. Position and size the button on the page. Use the Style arrow to change the color.
6. In the **Legend** field, enter the button name.
7. Select **Ad Hoc Report** from the **Type** drop-down list.
8. Click the black arrow beneath the **Type** drop-down list, select **44 - Employee Section Assignment Report** from the report list, and then click **OK**.
9. Click **Save**.

Configuring Table Cancellation Reasons

You can optionally create Reservation and Wait List Reasons to indicate why a guest cancels or abandons a table request.

1. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click **TMS Reasons**.
2. Enter a reason in the **Text** field. You can create a maximum of 32 reasons.
3. Click **Save**.

Setting Reservation Timing Parameters

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **TMS Parameters**.
2. On the **Configuration** tab, enter information in the following fields:

Table 52-17 Reservation Timing Fields

Field	Description
Reservation to Waitlist Delay	Enter the number of minutes that a reservation appears on the Wait List before the scheduled seating time. Reservation records that are visible on the Wait List impact the quote times and table suggestions.

Table 52-17 (Cont.) Reservation Timing Fields

Field	Description
Maximum Reservation Notice (Days)	Enter how far in advance a reservation can be made. This value includes the current business day. For example, a value of 90 indicates that guests can make reservations no more than 90 days in advance.
Minimum Reservation Notice (Minutes)	Enter the amount of advanced time when reservations can no longer be made for the same business day. For example, a value of 30 indicates that guests cannot make reservations less than 30 minutes in advance.

3. Select the appropriate options for reservation functions.

Table 52-18 Reservation Options

Option	Description
Require Reason Code on Abandon/Cancel	Select this option to have the POS client prompt the workstation operator to enter a cancellation reason for the reservation request.
Enable Reservation Approval	Select this option to have the workstation operator obtain approval when creating a reservation outside of a date or time available in the TMS inventory.
Enable Create and Edit Buttons	Select this option to show **Create** and **Edit** buttons following the Reservation List in the POS client. When you enable the buttons, the workstation operator can also double-tap the screen to create or edit reservations.

4. Click **Save**.

Setting Wait List Timing Parameters

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **TMS Parameters**.
2. On the **Configuration** tab, enter information in the following fields:

Table 52-19 Wait List Timing Fields

Field	Description
Reservation To Waitlist Delay	Enter the number of minutes that a reservation appears on the Wait List before the scheduled seating time. Reservation records that are visible on the Wait List impact the quote times and table suggestions.
Wait Quote Interval (Minutes)	Enter the wait quote time increments (for example, every 2 minutes or 5 minutes).

Table 52-19 (Cont.) Wait List Timing Fields

Field	Description
Auto Abandon Wait List Delay (Minutes)	Enter the number of minutes that a table request record remains on the Wait List before the application automatically updates it as Abandoned (for walk-ins) or No-Show (for reservations). The application removes the record from the Wait List after reaching this time threshold.
Wait Quote Alert Threshold (Minutes)	Enter the number of minutes to elapse before flagging the table request on the Wait List as Overdue for seating. Enter 0 (zero) to flag the table request as soon as the time quote elapses.

3. Select the appropriate options to enable or disable wait list functions. The following table describes the options.

Table 52-20 Wait List Options

Option	Description
Require Reason Code on Abandon/Cancel	Select this option to have the POS client prompt the workstation operator to enter a reason for abandoning or cancelling a table request.
Enable Wait List Chit Printing	Select this option to print a chit when the host staff creates or updates a table request. The chit contains table request information and the estimated wait time.
Enable Create and Edit Buttons	Select this option to show Create and Edit buttons following the Wait List in the POS client. When you enable the buttons, the workstation operator can also double-tap the screen to create or edit table requests.

4. Click **Save**.

Reservation Periods

Optional Reservation Period settings control reservation inventory and allow walk-in table requests. They also define projected turn times for tables based on time and cover count. If the property does not take reservations, Oracle Hospitality recommends configuring Reservation Periods so that hosting staff can use the Estimate Wait Quote feature on the Wait List.

Setting Reservation Periods consists of completing the following tasks:

- Setting the reservation period timeframe
- Setting reservations intervals and covers
- Setting occupancy
- Setting seating capacity and quantity
- Setting anticipated turn times for tables

Configuring Effectivity

1. Select the revenue center, click **Setup**, and then click **Reservation Periods**.
2. Insert a record with a name that describes the reservation period (for example, Weekday or Weekend).
3. Double-click the record to open it.
4. On the **Effectivity** tab, select the appropriate options as described in the following table:

Table 52-21 Effectivity

Option	Description
Effectivity Start Date	Select the first calendar day that the reservation period is effective. Deselecting the start date causes the reservation period for the reservation and wait lists to remain in effect indefinitely.
Effectivity End Date	Select the last calendar day that the reservation period is effective. Deselecting the end date causes the reservation period for the reservation and wait lists to remain in effect indefinitely.
Recurrence Day Of Week	Select the effective days of the week within the reservation period. You must select at least one day in order to save the reservation period.
Recurrence Time Of Day	Select the time of day that is effective in the reservation period. Deselecting the **Active Start Time** causes the reservation period for the reservation and wait lists to remain in effect starting at 00:00:00 on the applicable calendar days. Deselecting the **Active End Time** causes the reservation period for the reservation and wait lists to remain in effect until 23:59:59 on the applicable calendar days.

5. Click **Save**.

Configuring Acceptance Limits

Acceptance Limits define the following reservation period items:

- The interval (in minutes) in which reservations can be made
- The maximum new covers allowed within the interval

1. Select the revenue center, click **Setup**, and then click **Reservation Periods**.
2. Open the reservation period record.
3. Click the **General** tab, and then click the **Acceptance Limits** subtab.
4. Click the **Add** link, and then enter information in the Acceptance Limits fields:

Table 52-22 Acceptance Limits

Field	Description
Begin Time	Enter the time when the defined Acceptance Cycle and Limit begins (for example, 17:00).
End Time	Enter the time when the defined Acceptance Cycle and Limit ends (for example, 22:00).
Cycle	Enter the interval in minutes when reservations can be accepted. The Cycle defines the frequency with which you offer new reservations (for example, every 15 minutes or every 30 minutes) beginning with the start time.
Acceptance Limits	Enter a value to limit the potential kitchen workload. Entering 60 prevents new reservations for the defined cycle after the number of covers for all reservations in that cycle reaches or exceeds the limit.

5. Click **Save**.

Configuring Occupancy Limits

Occupancy Limits define the maximum number of covers allowed at any time. Occupancy Limits are typically set by building codes based on available exits.

1. Select the revenue center, click **Setup**, and then click **Reservation Periods**.
2. Open the reservation period record.
3. Click the **General** tab, and then click the **Occupancy Limits** subtab.
4. Click the **Add** link.
5. Enter information in the Occupancy Limits fields:

Table 52-23 Occupancy Limits

Field	Description
Begin Time	Enter the time when the defined Occupancy Limit begins.
End Time	Enter the time when the defined Occupancy Limit ends.
Occupancy Limit	Enter the revenue center occupancy. Entering 250 prevents new reservations for the defined Acceptance Limits cycle after the number of covers for all reservations within that timeframe reaches or exceeds the limit. If you do not create an Occupancy Limit, the application uses the default value of 9999 covers.

6. Click **Save**.

Configuring Seating Limits

Seating Limits define the number of available reservations allocated based on the cycle defined in the Acceptance Limits and Party Size.

1. Select the revenue center, click **Setup**, and then click **Reservation Periods**.
2. Open the reservation period record.
3. Click the **General** tab, and then click the **Seating Limits** subtab.
4. Click the **Add** link.
5. Enter information in the Seating Limits fields:

Table 52-24 Seating Limits

Field	Description
Begin Time	Enter the time when the defined Seating Limit begins.
End Time	Enter the time when the defined Seating Limit ends.
Capacity	Enter the number of covers in the party. The **Capacity** value cascades to lower values if you do not set a lower value. For example, if you set a capacity of 4, the cover includes requests for a party of 1 through 4. However, setting a lower capacity of 2 applies to parties of 1 or 2, and the capacity of 4 applies to parties of 3 or 4.
Quantity	Enter the number of reservations available for the Cycles within the timeframe. The **Quantity** determines how many reservations to allocate to accommodate the capacity between the **Begin Time** and **End Time** for each Cycle that you set on the **Acceptance Limits** tab. For example, you can allocate a quantity of 2 reservations every 15 minutes between 5:00 p.m. and 10:00 p.m. that accommodate a cover count of 2 or fewer. This value only defines the number allotted and does not represent the current inventory.

6. Click **Save**.

Configuring Target Turn Times

Target Turn Times define the target time from seating to request completion for a seated party. Target Turn Times also affect the following seating-related operations:

- Prevent reservation overbooking
- Estimate wait times for walk-in table requests
- Anticipate the tables that will be available in order to distribute the table seating appropriately

1. Select the revenue center, click **Setup**, and then click **Reservation Periods**.
2. Open the reservation period record.
3. Click the **General** tab, and then click the **Target Turn Times** subtab.
4. Click the **Add** link.
5. Enter information in the Target Turn Times fields:

Table 52-25 Target Turn Times

Field	Description
Begin Time	Enter the time when the defined Cover Count and Target Turn Time begins.
End Time	Enter the time when the defined Cover Count and Target Turn Time ends.
Cover Count	Enter the number of covers seated at the table. The **Cover Count** value cascades to lower values if you do not set a lower value. For example, if you set a cover count of 4, the cover includes requests for a party of 1 through 4. However, setting a lower capacity of 2 applies to parties of 1 or 2, and the capacity of 4 applies to parties of 3 or 4.
Minutes	Enter the anticipated turn time (in minutes) for a table seating of the defined **Cover Count** during the specified timeframe. If you do not create a Target Turn Time, the application uses the default value of 60. For example, if you enter 45, table seatings that encompass the defined cover count during the timeframe assume the seating request is 45 minutes in duration.

6. Click **Save**.

Table Management Configuration Levels

The following table shows the hierarchy levels within the EMC that allow you to configure table management operations.

Table 52-26 Table Management Configuration Levels

Configuration Module	Enterprise	Property	Revenue Center	Zone
Content	X	X	X	X
Dining Table Classes	X	X	X	
Employee Maintenance	X	X	X	
TMS Parameters	X	X	X	X
TMS Privileges	X			
Reservation Periods			X	
TMS Table Attributes	X	X	X	
KDS/Dining Course Colors	X	X		X
Loyalty Module	X	X	X	X

Table 52-26 (Cont.) Table Management Configuration Levels

Configuration Module	Enterprise	Property	Revenue Center	Zone
Page Design	X	X	X	X
Properties	X			
Seating Section Templates			X	
Sections			X	
Tables			X	

Reservation Configuration Levels

The following table shows the hierarchy levels within the EMC that allow you to configure reservation operations.

Table 52-27 Reservation Configuration Levels

Configuration Module	Enterprise	Property	Revenue Center	Zone
TMS Parameters	X	X	X	X
TMS Reasons	X	X	X	X
Reservation Periods			X	
TMS Table Attributes	X	X	X	
Loyalty Module	X	X	X	X
Page Design	X	X	X	X

Wait List Configuration Levels

The following table shows the hierarchy levels within the EMC that allow you to configure wait list operations.

Table 52-28 Wait List Configuration Levels

Configuration Module	Enterprise	Property	Revenue Center	Zone
TMS Parameters	X	X	X	X
TMS Reasons	X	X	X	X
Reservation Periods			X	
Wait Quote Configuration			X	

Table 52-28 (Cont.) Wait List Configuration Levels

Configuration Module	Enterprise	Property	Revenue Center	Zone
TMS Table Attributes	X	X	X	
Loyalty Module	X	X	X	X
Page Design	X	X	X	X

53
Enterprise Cash Management

You can use the Enterprise Cash Management (ECM) module to track the amount of cash located within a property. You can track the physical currency that is collected and the exact location of funds (for example, in a till, safe, bank deposit, or server bank). ECM follows currency as it progresses through the following phases:

- Enters the building (for example, cash tender, paid-in, or change order received from the bank)
- Moves through the building (for example, from tills to a safe or bank deposit)
- Leaves the building (for example, paid out to a vendor, change given to a guest, or taken to a bank for deposit)

As money flows through the operation, ECM logs all currency actions for reporting and auditing purposes.

Configuring ECM Privileges and Permissions

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type (for example, administrator, manager or server), and then click the **EMC Modules** tab.
3. In the Cash Management section, select the appropriate Cash Management operation permissions for the user role. You can grant permissions for the following actions:
    - **View**: Open and view a Cash Management module. If you allow a user to Edit, Add, or Delete, you must also grant View access (otherwise the user cannot open the module).
    - **Edit**: Update fields or records within a module.
    - **Add**: Add records to a module. You cannot add records to the Cash Management Class Behavior module.
    - **Delete**: Delete records from a module. You cannot delete records from the Cash Management Class Behavior module.
    - **Add Override**: Override records in a module. You cannot override records in the Cash Management Classes module.
4. Click the **Operations** tab, and then click the **Cash Management** subtab.
5. Select the appropriate options for the privileges. The following table summarizes the privileges associated with ECM functionality and the recommended roles to have the privilege set.

Table 53-1 ECM Privileges

Section	Option Number	Privilege Name	Allow the Employee to Perform or Authorize...	Recommended Role(s)
General Operations	249	Change Count Sheet	Changing the count sheet that the receptacle session uses	Manager
General Operations	250	Pull Cash	A cash pull	Cashier, Manager
General Operations	258	Threshold Level Exception	A Cash Pull Threshold Exception (bypass the threshold notification) when prompted and permitted	Manager
General Operations	260	View Receptacle Session Status	Viewing of summary information for all active receptacle sessions	Manager
General Operations	267	Update Balance on Count	Updating the balance on a count when the amount is outside the count threshold values	Manager
General Operations	301	View Cash Management Dashboard	Viewing the Cash Management Dashboard page	Manager
General Operations	302	View Cash Management Dashboard Detail	Viewing the till and server bank detail from the Cash Management Dashboard page	Manager
Till Operations	201	Assign Till to Cash Drawer	Assignment of a till to a cash drawer on a workstation	Manager
Till Operations	202	Unassign Till from Cash Drawer	Unassignment of a till to a cash drawer on a workstation	Manager
Till Operations	203	Assign User to Till	Perform or authorize the assignment of an employee to an active till session	Manager

Table 53-1 (Cont.) ECM Privileges

Section	Option Number	Privilege Name	Allow the Employee to Perform or Authorize...	Recommended Role(s)
Till Operations	204	Unassign User from Till	Unassignment of an employee to an active till session	Manager
Till Operations	205	Count Till	Counting of a till session	Cash Handler
Till Operations	206	Adjust Till Count	Adjustment of the last count for a till session	Manager
Till Operations	207	Paid-In/Paid-Out	Posting of an ECM paid-in or paid-out on a till session Workstation operators can perform standard paid-in and paid-out transactions based on Tender/ Media configuration.	Manager
Till Operations	209	Transfer Funds	Transfer of items from a till session to another cash receptacle session	Cashier, Manager
Till Operations	210	Deposit Funds	Deposit of cash from a till session to a bank deposit session	Cash Handler
Till Operations	212	Close Till	Closing of a till session	Cash Handler
Till Operations	213	Reopen Till	Reopening of a till session	Manager
Till Operations	251	Quick Start Till	Opening of a till session and assignment of the current operator to a workstation cash drawer	Cash Handler
Till Operations	259	Adjust Till Starting Amount	Adjustment of the till starting amount	Manager
Server Bank Operations	241	Start Server Bank	Opening of a new server bank session	Manager

Table 53-1 (Cont.) ECM Privileges

Section	Option Number	Privilege Name	Allow the Employee to Perform or Authorize...	Recommended Role(s)
Server Bank Operations	242	Count Server Bank	Counting of a server bank session	Manager
Server Bank Operations	243	Adjust Server Bank Count	Adjustment of the last count for a server bank session	Manager
Server Bank Operations	244	Paid-In/Paid-Out	Posting of an ECM paid-in or paid-out on a server bank session Workstation operators can perform standard paid-in and paid-out transactions based on Tender/ Media configuration.	Manager
Server Bank Operations	245	Transfer Funds	Transferring of funds from a server bank session to another cash receptacle session	Manager
Server Bank Operations	246	Deposit Funds	Deposit of cash from a server bank session to a bank deposit session	Manager
Server Bank Operations	247	Close Server Bank	Closing of a server bank session	Manager
Server Bank Operations	248	Reopen Server Bank	Reopening a closed server bank	Manager
Server Bank Operations	265	Adjust Server Bank Starting Amount	Adjustment of the server bank session starting amount	Manager
Server Bank Operations	269	Consolidate Server Banks	Consolidating two server bank sessions	Manager
Safe Operations	214	Open Safe	Opening of a new safe session	Manager
Safe Operations	215	Count Safe	Counting of a safe session	Manager

Table 53-1 (Cont.) ECM Privileges

Section	Option Number	Privilege Name	Allow the Employee to Perform or Authorize...	Recommended Role(s)
Safe Operations	216	Adjust Safe Count	Adjustment of the last count for a safe session	Manager
Safe Operations	217	Paid-In/Paid-Out	Posting of an ECM paid-in or paid-out on a safe session Workstation operators can perform standard paid-in and paid-out transactions based on Tender/ Media configuration.	Manager
Safe Operations	218	Transfer Funds	Transferring of funds from a safe session to another cash receptacle session	Manager
Safe Operations	219	Deposit Funds	Deposit of cash from a safe session to a bank deposit session	Manager
Safe Operations	220	Close Safe	Closing of a safe session	Manager
Safe Operations	261	Add Funds to Safe	Adding new funds into ECM through a safe receptacle	Manager
Safe Operations	262	Remove Funds from Safe	Removing funds from ECM through a safe receptacle	Manager
Petty Cash Operations	222	Open Petty Cash	Opening of a new petty cash session	Manager
Petty Cash Operations	223	Count Petty Cash	Counting of a petty cash session	Manager
Petty Cash Operations	224	Adjust Petty Cash Count	Adjustment of the last petty cash session count	Manager

Table 53-1 (Cont.) ECM Privileges

Section	Option Number	Privilege Name	Allow the Employee to Perform or Authorize...	Recommended Role(s)
Petty Cash Operations	225	Paid-In/Paid-Out	Posting of an ECM paid-in or paid-out on a petty cash session Workstation operators can perform standard paid-in and paid-out transactions based on Tender/ Media configuration.	Manager
Petty Cash Operations	226	Transfer Funds	Transferring of funds from a petty cash session to another cash receptacle session	Manager
Petty Cash Operations	227	Deposit Funds	Deposit of cash from a petty cash session to a bank deposit session	Manager
Petty Cash Operations	228	Close Petty Cash	Closing of a petty cash session	Manager
Bank Deposit Operations	233	Create a Bank Deposit	Opening of a new bank deposit session	Manager
Bank Deposit Operations	234	Transfer Funds	Transferring of funds from a bank deposit to another cash receptacle session	Manager
Bank Deposit Operations	237	Adjust Cash Deposit	Adjustment of a cash deposit amount in a bank deposit session	Manager
Bank Deposit Operations	239	Reconcile Bank Deposit	Reconciliation of a bank deposit session	Manager
Bank Deposit Operations	264	Adjust Bank Deposit Reference	Adjustment of a reference on a bank deposit session	Manager

Table 53-1 (Cont.) ECM Privileges

Section	Option Number	Privilege Name	Allow the Employee to Perform or Authorize...	Recommended Role(s)
Change Order Operations	230	Create Change Order	Creation of a new Change Order request from a safe session	Manager
Change Order Operations	232	Reconcile Change Order	Reconciliation of a Change Order	Manager
Change Order Operations	252	Submit Change Order	Submission of a new Change Order request from a safe session	Manager
Change Order Operations	268	Save / Recall Change Order	Saving or recalling a Change Order	Manager

6. Click **Save**.

Allowing Users to View Blind Totals

In some cases, you can require that workstation operators view the difference between the amount entered during a count and the amount expected by application transaction activity. Selecting **View Blind Totals** allows workstation operators within the Employee Class to view application expected values and the difference on the count sheet. When an over or short condition exists, the workstation operator can select the reason for the variance.

1. Select the property, click **Configuration**, and then click **Employee Classes**.
2. Select the role type, and then click **Operator Options**.
3. Select **25 - View Blind Totals**.
4. Click **Save**.

Allowing Assigned Receptacle Access and Counts

ECM requires that you assign a workstation operator to a till or server bank receptacle session to perform transactions against the session. Managers need access to work within these receptacle sessions without being assigned to the sessions. You can create an Employee Class for management workstation operators with a configuration set that allows them to perform transactions against the till or server banking session without prior assignment.

1. Select the property, click **Configuration**, and then click **Employee Classes**.
2. Select the role type, and then click **Operator Options**.
3. Select **26 - Allow Assigned Receptacle Access** to:
   - Allow workstation operators to view and perform transactions for till receptacles when the operator is not the owner or an assigned user.
   - Show a list of employees with closed server bank sessions that can be reopened.

4. To prevent the workstation operator from counting a till or server bank receptacle session more than once, select **27 - Prevent Multiple Receptacle Counts**.

   If the receptacle session was already counted, the workstation operator cannot count it again immediately afterwards. However, if you select option **27**, the workstation operator can perform transactions after counting a receptacle session.

5. To prevent the workstation operator from performing more transactions after counting a receptacle session, select option **28 - Prevent Transactions once a Count has been Performed**.

   Starting with release 19.2.1, option **28** is available. Selecting **28** does not prevent the workstation operator from adjusting a count or from transferring funds out of the counted receptacle.

   If option **27** is disabled and option **28** is enabled, the workstation operator can perform more than one count and can perform more transactions following a count.

6. Click **Save**.

Configuring Accounting Methods for Users

You can specify the type of accounting method a workstation operator uses to track cash management activities. The method you select determines the type of Front of House receptacles the workstation operator can access.

1. Select the property, click **Configuration**, and then click **Employee Classes**.
2. Select the role type.
3. On the **General** tab, select the appropriate **Cash Management Accounting Method**:
   - **None**: Select this option to prevent the workstation operator from executing till or server banking transactions.
   - **Till Banking**: Select this option for workstation operators that maintain and work from a till that is assigned to a workstation (for example, bartenders and cashiers).
   - **Server Banking**: Select this option for workstation operators who maintain and work from an individual server bank on their person (for example, servers who are responsible for accepting payment on guest checks). This accounting method does not allow workstation operators to perform transaction activity on a till session when the operator is an assigned user.
4. Click **Save**.

Tracking Tender Transaction Items

You can identify tender media transaction items (for example, cash, check, and other currency based tenders) that you want ECM to track.

1. Select the Enterprise, zone, or property, click **Configuration**, and then click **Tender/Media**.
2. Double-click the tender media record.
3. Click the **Options** tab, and then click the **Ops Behavior** subtab.
4. Select the appropriate Tender Media options, and then click **OK**.
   - **4 - Use with Currency Conversion**: Select this option for the foreign currency class payment tender.

- **91 - Cash Management Transaction Item**: Select this option to include the tender record in ECM tracking and reporting.
- (Optional) **92 - Affects Cash Pull Threshold**: Select this option to have transactions performed for this tender record affect the Cash Pull Threshold Set balance. Select this option for tender records that represent a loss if they are lost or stolen (for example, cash and checks). You must select option **91** to use option **92**.

5. Click **Save**.

Tracking Service Charge Transactions

You can identify service charge transactions (for example, gift card sales) that you want ECM to track.

1. Select the Enterprise, zone, or property, click **Configuration**, and then click **Service Charges**.
2. Double-click the service charge.
3. Select **28 - Cash Management Transaction Item** to include the service charge record in ECM tracking and reporting.
4. Click **Save**.

Tracking Discount Transactions

You can identify discount transactions (for example, coupons and promotional vouchers) that you want ECM to track.

1. Select the Enterprise, zone, or property, click **Configuration**, and then click **Discounts**.
2. Double-click the discount.
3. Select the appropriate discount options on the **General** tab:
   - **33 - Cash Management Transaction Item**: Select this option to include the discount record in ECM tracking and reporting.
   - (Optional) **34 - Affects Cash Pull Threshold**: Select this option to have transactions performed for this discount record increase the value in a receptacle. You must select option **33** to use option **34**.
4. Click **Save**.

Creating, Editing, and Deleting Cash Management Reasons

Certain ECM operations allow (and sometimes require) the workstation operator to enter a reason for performing the operation. For example, workstation operators must provide a reason for adjusting transactions.

1. Select the Enterprise, zone, property, or revenue center, click **Descriptors**, and then click **Cash Management Reasons**.
2. Highlight the Cash Management transaction, and then select **Add Reason**.
3. Enter the reason name, based on the following guidelines:
   - You can define multiple reasons for each transaction.
   - You can use each reason name only once per transaction type.

When you enter a No Sale Reason, the cash drawer opens only after the workstation operator enters a reason when performing a No Sale transaction. You can set and use No Sale reason codes without activating ECM. You can also access No Sale reason codes through extensibility or a System Interface Module (SIM)-based event.

4. Click **Save**.
5. To edit a reason, highlight the reason record, change the reason name, and then click **Save**.

   After you change a reason, the new reason appears when viewing historical reporting activity.
6. To delete a reason, highlight the reason record, and then select **Delete Reason**.

   The application allows you to delete only reasons that are not referenced in historical reporting activity.

Cash Management Classes

Beginning with Simphony version 18.1, the ECM supports multiple classes (currency and non-currency based). Non-currency items include credit card vouchers, gift cards, and coupons. Classes can be based on primary or alternate currencies. The Engagement console shows multiple classes in widgets.

Reporting and Analytics version 18.1 Enterprise reports and workstation property reports support the tracking of multiple classes. If you upgrade to Simphony version 18.1, but do not upgrade to Reporting and Analytics version 9.0 (for example, Reporting and Analytics remains at version 8.5.0), Enterprise reports do not show information for multiple classes, nor do they show the correct base class.

Adding Transaction Items

You must map transaction items (for example, tenders) to the Cash Management currency class to measure their impact (increase or decrease) on the balance of all transactions. ECM tracks only transaction items that are mapped to the class.

1. Select the Enterprise, zone, or property, click **Setup**, and then click **Cash Management Classes**.
2. Insert a Cash Management class record, and then double-click it.
3. Click the **Transaction Items** tab.
4. Enter the name of the class to track in ECM (for example, Cash US Dollars, Cash Canadian Dollars, Vouchers, and so on).
5. Select an available **Currency** from the list to associate with the Cash Management class.

   You can only associate the currency with a single class. Select **0 - None** for non-currency tracking (for example, vouchers and stored value cards) as these items are always based on the property's local currency.
6. Click **Save**.
7. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Cash Management Class Behavior**.

   Records are automatically created and removed in the Cash Management Class Behavior module based on the creation and deletion of records in the Cash Management Classes module. If you have the appropriate permission, you can use the Cash Management Class

Behavior module to customize and override the class configuration. Configuring ECM Privileges and Permissions contains more information about the **Add Override** permission.

8. Right-click a record, select **Override Record**, and then select one of the following:
   - **Use Existing Record**
   - **Create Blank Record**
9. Select **Display on Status** to show the currency class on the POS client workstation when viewing the receptacle status.

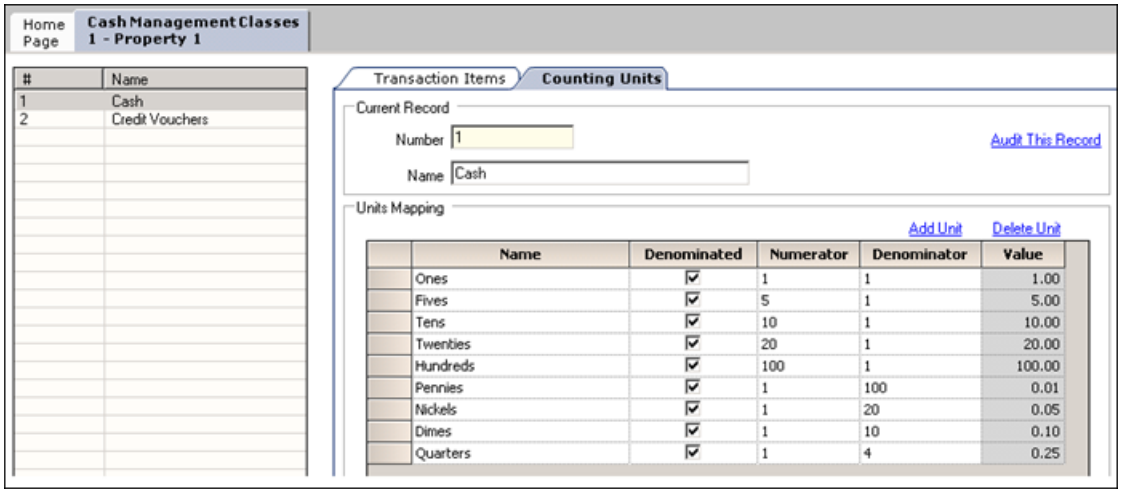
   The *Oracle Hospitality Simphony Manager User Guide* contains information on Viewing Receptacle Status.
10. Select **Add Transaction Item**.
11. Select the **Transaction Item Type** (for example, Tender).
12. Select the **Transaction Item** (for example, Euro Cash).

    The **Cash Management Transaction Item** options in the tender, service charge, or discount determine the items that appear in the **Transaction Item** list. You can use each transaction item only once per currency class.
13. Click **Save**.

Adding Counting Units

After you add a denomination unit to a Cash Management class, ECM includes the unit when building Count Sheets and PAR Level Sets. The following figure shows an example of the units mapping setup.

Figure 53-1 Counting Units



1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Cash Management Classes**.
2. Double-click a Cash Management class record.
3. Click the **Counting Units** tab.
4. Select **Add Unit**.

5. Enter the name of the unit (for example, Pennies, Fives, Twenties, Travelers Checks, and so on).
6. If the unit has a consistent cash value (for example, notes and coins), select **Denominated**. Do not select this option for transaction items that have inconsistent cash values (for example, personal checks, credit cards, and gift cards).
7. If the unit is denominated, enter the units value relative to the base currency unit in the **Numerator** field. For example, when the base currency is US dollars, the base currency unit is 1 ($1.00).
8. If the unit is denominated, enter the number of units relative to the base currency unit in the **Denominator** field. For example, when the base currency is US dollars, the base currency unit is 1 ($1.00).
9. After you enter the numerator and denominator, the **Value** field shows the calculated value per unit.
10. Click **Save**.

Cash Pull Threshold Set

The optional Cash Pull Threshold Set provides a group of balance-based levels to compare against a till or server banking session during a transaction. The Cash Pull Threshold Set indicates when notifications occur for cash pulls. These notifications minimize risk by limiting the amount of cash circulating in the Front of House. You can add one or more threshold levels to a Cash Pull Threshold Set. If you create a threshold based on one or more currency classes, a cash pull notification occurs when a till or server banking session meets or exceeds the amount of a specific currency class.

Creating, Editing, and Deleting a Cash Pull Threshold Set

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Cash Pull Threshold Sets**.
2. Insert a record, enter the name of the Cash Pull Threshold Set, and then click **OK**.
3. Double-click the record to open it.
4. Enter the **Chit Quantity**.

   This is the number of chits that print when a workstation operator performs a cash pull. A cash pull chit represents the funds that are removed from the till or server bank.
5. Select **Add**, and then enter the name of the threshold set.

   The name is part of the notification that appears in the application.
6. Enter the **Amount**.

   This is the amount-based threshold (for example, 100 dollars) that elevates the cash pull notification to the threshold level. If you configure more than one threshold level, subsequent amounts cannot be equal to or lower than the previous cash pull amount in the same set.
7. Select **Approval** to allow a workstation operator with the Threshold Level Exception privilege to authorize the operator to ignore the exception and to process transactions against the receptacle without performing a cash pull.
8. Click **Save**.
9. To edit a cash pull threshold set, highlight the record, change the values, and then click **Save**.

The last (final) threshold level does not allow a threshold exception (bypass). This requires the workstation operator to perform a cash pull first to execute additional activities against the till or server bank later.

10. To delete a cash pull threshold set, highlight the record, and then select **Delete**.

    You cannot delete a Cash Pull Threshold Set associated with one or more templates.

Cash Count Threshold Set

The optional Cash Count Threshold Set provides an allowable variance threshold for countable receptacles. This threshold is the difference between counted totals and expected totals. The threshold indicates the overage and shortage amounts allowed to complete a receptacle count. You can add one or more cash count threshold sets to a count sheet. You can also configure multiple currency classes for a cash count threshold set, and allow workstation operators to set varying thresholds against the classes.

Creating, Editing, and Deleting a Cash Count Threshold Set

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Cash Count Threshold Sets**.
2. Add a Cash Count Threshold Set, enter the name, and then click **OK**.
3. Enter the **Short** amount.

   This value is the minimum variance amount allowed to complete the receptacle count.
4. Enter the **Over** amount.

   This value is the maximum variance amount allowed to complete the receptacle count.
5. Enter the number of **Max Count Attempts**.

   This value limits the number of times a workstation operator can attempt to submit a count when the count is over or short beyond the defined threshold.
6. To define additional over or short amounts for each currency class, click the **Add Class** link.

   You cannot define multiple over or short amounts for the same primary class within a Cash Count Threshold Set.

   a. Select the **Class** from the drop-down list.

   b. (Optional) In the **Over** field, enter the approved over variance amount for workstation operators to enter for the count.

   c. (Optional) In the **Short** field, enter the approved short variance amount for workstation operators to enter for the count.
7. Click **Save**.
8. To edit a cash count threshold set, highlight the record, change the values, and then click **Save**.
9. To delete a cash count threshold set, highlight the record, and then select **Delete**.

   You cannot delete a Cash Count Threshold Set associated with one or more templates.

PAR Level Set

Periodic Automatic Replenishment (PAR) Level Sets specify the suggested quantity to maintain of each currency denomination kept in a safe (for example, rolls of coins or quantity of a denominated note). PAR Level Sets are comprised of count units drawn from the list of denominated items in a Cash Management class. The PAR determines the values required when issuing a Change Order request to return the receptacle back to the PAR based on the last known count of the receptacle. The use of a PAR Level Set is optional.

Creating, Editing, and Deleting a PAR Level Set

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **PAR Level Sets**.
2. Insert a record, and enter the **PAR Level Set** name.
3. Double-click the record to open it.
4. Select the **CM Class**.

   The **CM Class** list includes all Cash Management classes that you created. These Cash Management classes contain the units that are allowed within the PAR Level Set.
5. Add a Counting Unit using one of the following methods:
   - Select **Add All Units** to have ECM add all defined units for the Cash Management class to the PAR Level.
   - Select **Add Unit** to manually add specific units.
6. For each of the defined units, enter the quantity of units to maintain as part of the PAR Level Set for each day of the week.

   The Totals row beneath the Units table shows the cash value required for each unit quantity and day of the week.
7. Click **Save**.
8. To edit a PAR Level Set, highlight the record, change the values, and then click **Save**.
9. To delete a PAR Level Set, highlight the record, and then select **Delete**.

   You cannot delete a PAR Level Set that is associated with one or more templates.

Count Sheet

A Count Sheet is a custom form used to audit the contents of a safe, till, server bank, or petty cash receptacle. A workstation operator uses a Count Sheet during the physical counting of a receptacle session. You can configure the count to include one of the following:

- Expected funds where variances are recorded
- A simple counting of funds where no variance is tracked (blind count)

You can create unique Count Sheets for each receptacle session to determine the items and order in which a count is performed, as well as the format for the printed Count Sheet results. Creating a Count Sheet is similar to building a report. You can associate multiple classes with a Count Sheet. When you create a Count Sheet, you define Pages, Groups, and Units.

Pages

A Count Sheet Page is similar to a chapter in a report. Pages allow you to see totals for all values counted within the page. For example, you can create a page for each currency class (US Dollars, Euros, and Pounds Sterling).

Groups

Transaction Items are reported in Count Sheet groups. Groups allow you to see totals for all values counted within the group. For example, you can create separate groups for Notes (paper money) and Coins. Within the Notes group, you can assign the currency class (such as Euros).

Units

A unit is optional but recommended for groups that report based on counting units. If you do not add a unit, a Total entry appears for the group. Units define the denominations associated with a currency. Notes, coins, traveler's checks, and gift certificates are examples of denominated items. Personal checks and credit cards are not denominated items, because the amount of money associated with them varies with the transaction.

The currency is used as a tender in most cases, but not always. Some tenders indicate whether the unit has a consistent cash value. A twenty dollar bill is always worth $20.00 US. If the unit is denominated, you must define a value relative to the base currency. For example, if the base currency is US Dollars (US$), the following ratios can be defined:

- Twenties = 20:1 (twenty US$ per unit)
- Tens = 10:1 (ten US$ per unit)
- Quarters = 1:4 (1/4 of a US$ per unit)
- Dime Roll = 5:1 (five US$ per unit)

Creating, Editing, and Deleting a Count Sheet

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Count Sheets**.
2. Insert a record, enter a unique name for the Count Sheet, and then click **OK**.
3. To add or delete a Count Sheet Page:
   a. In the Pages section, click the **Add** link.
   b. Enter a name for each page in the **Name** column (for example, Cash and Vouchers).
   c. To delete a page, highlight the page name record, and then click the **Delete** link. The application deletes all units associated with a group for the selected page, along with the page.
4. To add or delete a Count Sheet Group:
   a. In the Pages section, highlight a page.
   b. In the Groups section, click the **Add** link.
   c. Enter a name for each group in the **Name** column. For example, you can have a Cash page with the groups Notes (paper currency) and Coins.
   d. Select the Cash Management currency class for each group from the **Class** drop-down list.

      When you select a **Class**, the **Name** column shows the name of the class if it was not previously entered. Change the **Name** value to show its representation on the Count Sheet POS client view and chit printout.
   e. Select the appropriate Options for each group:

- **1 - Allow Multiple Entries**: Select this option to allow unique entry of certain items (for example, gift cards and checks). The Group provides a multiple entry list when performing a count. This type of count is used to include non-denominated transaction items, such as personal checks or gift cards as part of a count, where the amount of each individual item must be tracked (for example, check and gift card amounts).
- **2 - Reference Required**: Select this option to have the POS client prompt the workstation operator to enter a reference on the Count Sheet (for example, gift card number, personal check number, credit card, or voucher number) for each amount entered. Deselect this option to skip the reference prompt when entering non-denominated values on the count sheet.

f. Repeat Steps 4a through 4e to add other groups to track.

g. To delete a group, highlight the group record, and then click the **Delete** link. The application deletes the group and all units associated with the group.

5. Too add or delete Count Sheet Units:

   a. In the Groups section, highlight a group.

   b. In the Units section, click the **Add** link to add all units to count as part of the group.

   c. Select the **Units** for each group from the **Units** drop-down list.

      Only the Unit Types associated with the Cash Management Class for the group are available in the **Units** drop-down list. When you select a **Units** value, the **Name** column shows the name of the unit selected. Change the **Name** value to show its representation on the Count Sheet POS client view and chit printout. You can use each Unit Type only once on a page.

   d. To delete a unit, highlight a unit record, and then click the **Delete** link.

6. Click **Save**.

7. To sort and alter the order in which pages, groups on a page, and units within a group appear on the Count Sheet at the POS client, use the up and down arrows.

   All units that are part of the selected group remain with the group as it moves. Units that are part of groups for the selected page remain with the page as it moves. Groups that are part of the selected page remain with the page as it moves.

8. To edit a Count Sheet, highlight the count sheet record, change the values, and then click **Save**.

   When you change a Count Sheet, the application removes all units associated with the group.

9. To delete a Count Sheet, highlight the record, and then select **Delete**.

   You cannot delete a Count Sheet associated with one or more templates.

Creating, Editing, and Deleting an Account

You can use accounts to report general ledger accounting information for ECM paid-in and paid-out transactions (for example, produce, meat, bakery, or flower shop).

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Accounts**.

2. Insert a record, enter a unique name for the account, and then click **OK**.

3. Click the ellipsis point (...) button in the Options column.

a. Select **1 - Deactivate Account** to deactivate or suspend an account that is no longer being used. A newly created account is active by default.

b. Select **2 - Exclude on Paid In** to exclude the account and associated vendors from being used when a workstation operator performs a paid-in transaction.

c. Select **3 - Exclude on Paid Out** to exclude the account and associated vendors from being used when a workstation operator performs a paid-out transaction.

4. To edit an account, highlight the record, change the values, and then click **Save**.
5. To delete an account, highlight the record, and then click **Delete** on the toolbar.

   The application only allows you to delete accounts that are not referenced in historical reporting activity. When an account is assigned to a vendor, you cannot delete it. You can unassign the account from the vendor.
6. Click **Save**.

Creating, Editing, and Deleting a Vendor

You can use a vendor to associate companies with ECM paid-in and paid-out transactions for reporting purposes.

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Vendors**.
2. Insert a record, enter a unique name for the vendor, and then click **OK**.
3. (Optional) Select an account from the **Account** drop-down list to associate with the vendor.

   The vendor always uses the selected account for ECM paid-in and paid-out transactions.
4. Click the ellipsis point (...) button from the Options column and select the appropriate vendor options:
   - **1 - Deactivate Vendor**: Select this option to prevent further selection of the vendor when performing transactions. For example, you can place a credit hold. A newly created vendor is active by default.
   - (Optional) **2 - Invoice Data Required**: Select this option to require the workstation operator to enter invoice information (for example, Date, Invoice Number, and Description) when performing a transaction for the vendor that can collect invoice data (for example, paid-out).
   - **3 - Require Reference on Use**: Select this option to require the workstation operator to enter a reference when performing a transaction that requires a vendor.
5. To edit a vendor, highlight the record, change the values, and then click **Save**.
6. To delete a vendor, highlight the record, and then click **Delete** on the toolbar.

   The application only allows you to delete vendors that are not referenced in historical reporting activity.
7. Click **Save**.

Creating and Editing a Template

You need to use a template to set the initial configuration and operating values for all new receptacle tracking sessions. This includes setting the amount, assigning a count sheet, and specifying how the application handles the opening balance after the workstation operator

closes the receptacle. A template allows additional configuration for specified classes or class exclusions (till and server bank receptacles only) based on the receptacle type.

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Templates**.
2. Insert a template record with a unique name, and then click **OK**.
3. Double-click the template record to open it.
4. On the **General** tab, enter or select information in the following fields:
   - (Optional) **Description**: A description provides further understanding of the template that might not be distinguishable by looking at the template name. The Description is not shown as part of the receptacle when the workstation operator opens the receptacle from a template
   - **Receptacle Type**: Depending on the type of receptacle you select, additional fields become active. The following table describes the fields and receptacle types.

Table 53-2 Template Receptacle Types and Fields

Field or Option	Template Receptacle Type				
	Safe	Till	Server Bank	Bank Deposit	Petty Cash
Starting Amount		Optional	Optional		
Starting Amount Source		Required	Optional		
Prompt for Starting Amount		Optional	Optional		
Cash Pull Threshold		Optional	Optional		
Cash Pull Destination		Optional	Optional		
Count Sheet	Required	Required	Required		Required
Cash Count Threshold	Optional	Optional	Optional		Optional
Close on Count Completion		Optional	Optional		
PAR Level	Optional				
Maximum				Required	Required
Minimum					Required
Cash Deposit Routing		Optional	Optional		

   - **Start Amount**: The starting amount determines the initial currency value of the session upon opening.
   - **Starting Amount Source**: The starting amount source determines where the starting amount for the session originates. You can specify different starting amount source configurations for the General and Class Detail tabs (for example, if the source is a different safe that holds only foreign currencies).

The source for a server bank session must be either an internal (House supplied) or external (server supplied) starting amount for all defined ECM classes (not internal and external). If you select **None** for a server bank, the starting amount is considered to be part of the receptacle and funds are not transferred from a source receptacle session. For example, a server who self funds a bank does not receive a funds transfer from the safe when opening the bank. Selecting a defined safe transfers the starting amount from the safe session to the receptacle session upon opening.

- **Prompt for Starting Amount**: Select this option to prompt the workstation operator to enter the starting amount for the receptacle session upon opening. When you select this option, the application ignores the value in the starting amount field. This option is typically used for server banks where the server self-funds the bank.
- **Cash Pull Threshold**: This field defines the Cash Pull Threshold Set that a receptacle session uses. If you set cash pull values, select a threshold set from the drop-down list to be used for the template.
- **Cash Pull Destination**: Select a destination receptacle into which funds from cash pull operations will transfer; if you select **None**, funds do not transfer and ownership remains with the receptacle session.
- **Count Sheet**: The Count Sheet value in a template determines the Count Sheet that is used to count the receptacle.
- **Cash Count Threshold**: This field defines the Cash Count Threshold Set that a receptacle session uses. If you set cash count values, select a **Threshold Set** from the drop-down list to be used for the template.
- **Close on Count Completion**: Select this option to have the application attempt to automatically reconcile the receptacle session upon completion of the count. This process transfers funds from the receptacle session to the sessions designated under **Starting Amount Source** and **Cash Deposit Routing** to bring the session to zero. Deselect this option to leave the session open after the count completes. The workstation operator must then manually reconcile all funds and close the receptacle.
- **PAR Level**: The PAR Level defines the PAR Level Set (quantity to maintain of each currency denomination) to use for the safe session.
- **Minimum**: The minimum balance determines the lowest amount of funds permitted as part of a receptacle session. The application prevents workstation operators from processing most activity that takes the session balance below this amount. If you do not set a minimum balance, the application defaults to 0 (no minimum).
- **Maximum**: The maximum balance determines the largest amount of funds permitted as part of a receptacle session. The application prevents workstation operators from processing most activity that takes the session balance beyond this amount. If you do not set a maximum balance, it defaults to 0 (no maximum).
- **Cash Deposit Routing**: Select the destination receptacle (safe or bank deposit) session to receive funds that transfer from a receptacle session as part of a cash deposit operation. When you select **None**, the application prompts the workstation operator to select a location to deposit cash.

5. Click the **Class Details** tab.

   a. To create additional currency classes (alternate currency such as Dollar, Peso, Euro, or Pounds, or non-currency such as gift cards) for a receptacle session or operation, click the **Add Class** link.

      When you configure the base currency in the **Class Details** tab, these settings override the configuration set in the **General** tab. Use the **Add Class** link for receptacle sessions and operations that have multiple cash management classes. You

can add alternate classes for bank deposit, till, server bank, and petty cash receptacle templates only. You cannot add a duplicate class entry.

b. To remove a class, click the **Delete Class** link, select the class, and then click **OK**.

c. To add additional PAR Levels, click the **Add PAR Level** link.

You can add a PAR Level for safe receptacle templates only.

d. To remove a PAR Level, click the **Delete PAR Level** link, select the PAR Level, and then click **OK**.

6. Click the **Class Exclusions** tab.

a. To specify currency classes that cannot be used in till and server bank receptacles created with the receptacle template, click the **Add Class** link, and then select the class.

For example, if a till uses the template which excludes the Euros currency class, the Count Sheet does not show the Euro page. You can exclude classes for the till and server bank receptacle templates only. A till and server bank receptacle accepts any currency class unless you exclude it here.

b. To remove classes from the class exclusion list, click the **Delete Class** link, select the class, and then click **OK**.

7. To edit a template, highlight the template record, change the values, and then click **Save**.

Creating, Editing, and Deactivating Receptacles

A receptacle represents a physical or virtual location used to store funds and draw transactions.

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Receptacles**.
2. Insert a record, enter a unique name for the receptacle, and then click **OK**.
3. Double-click the receptacle record to open it.
4. Enter or select information in the receptacle fields.
   - **Receptacle Type**: Select the type of receptacle.
   - **Template Name**: Select the template to use for this receptacle.
   - **Location**: Select the location where the receptacle is defined.

     You can define a receptacle type that is commonly used across an Enterprise or region without uniquely defining it at each property or revenue center. The location allows you to specify a receptacle name and configuration to be used in multiple locations. When you select **2 - Property**, a receptacle is defined for each property based on the values entered. When you select **3 - Revenue Center**, a receptacle is defined within each revenue center.

     For example, each property might have one safe to maintain all cash transactions for the entire property. Create a safe receptacle from the Enterprise level or zone, and then specify the property in the **Location** field. The safe receptacle is defined at all properties under the selected level.
   - **Options**: Select **Deactivate Receptacle** to prevent workstation operators from performing further activity against the receptacle.
5. To edit a receptacle, highlight the record, change the values, and then click **Save**.
6. To deactivate a receptacle, highlight the record, and then select **Deactivate Receptacle**.

Deleting a receptacle is not permitted.

7. Click **Save**.

Setting Cash Management Parameters

1. Select the Enterprise, zone, property, or revenue center, click **Setup**, and then click **Cash Management Parameters**.
2. Click the **Configuration** tab.
3. Enter or select the appropriate information.

Table 53-3 Cash Management Parameters Configuration Fields

Field	Description
Cash Pull Notification Frequency	Specify when the application notifies workstation operators of the cash pull threshold levels being reached or exceeded. • **0 - None**: Select this option to disable cash pull notifications (default). Workstation operators can use the manual process for cash pulls. • **1 - On Threshold Level Only**: Select this option to notify the workstation operator once upon reaching or exceeding a defined threshold level in the Threshold Level Set. • **2 - On Each Transaction**: Select this option to notify the workstation operator with each new check access attempt upon reaching or exceeding a defined threshold level in the Threshold Level Set.
Receptacle Balancing Class	Select the class that is based on the currency in which the property operates. All transaction items included in the Cash Management Class selection determine the appearance of the receptacle balance on views and reports.
Change Order Report Count	Enter the number of reports to print when a workstation operator creates a new Change Order request.
Counting Method	Select the method in which the workstation operator must enter counting units when performing a count or change order. • **1 - Quantity**: Select this option to require the workstation operator to enter the quantity of the counting units. The application calculates the value based on the quantity entered for the associated counting unit. • **2 - Value**: Select this option to require the workstation operator to enter the value of the counting units. The application calculates the quantity based on the value entered for the associated counting unit.

Table 53-3 (Cont.) Cash Management Parameters Configuration Fields

Field	Description
Paid-In/Paid-Out Chit Count	Enter the number of chits to print when the workstation operator performs an ECM paid-in or paid-out transaction.
Server Banking Template	Select the default template to use when a workstation operator opens a new server banking session. You can override this setting from the Employee Classes module.

4. Click the **Options** tab.
5. Select the appropriate Cash Management Parameter options.

Table 53-4 Cash Management Parameter Options

Option	Description
1 - Enable Cash Management	Select this option to activate all ECM features and functions in the application. Selecting **Enable Cash Management** increases both required workstation resources and bandwidth for communications with the Enterprise. You can define all ECM configurations without selecting this option. This allows you to configure ECM beforehand and activate ECM with a single option.
11 - Require Reason on Adjust Starting Amount	Select this option to require the workstation operator to select a reason code when adjusting a starting amount.
12 - Require Reason on Adjust Count	Select this option to require the workstation operator to select a reason code when adjusting a previously entered count.
13 - Require Reason on Adjust Cash Deposit	Select this option to require the workstation operator to select a reason code when adjusting a cash deposit transaction.
14 - Require Reason on Paid-In	Select this option to require the workstation operator to select a reason code when performing a paid-in transaction.
15 - Require Reason on Paid-Out	Select this option to require the workstation operator to select a reason code when performing a paid-out transaction.
16 - Require Reason on Transfer	Select this option to require the workstation operator to select a reason code when transferring funds from one receptacle to another.
17 - Require Reason on Adjust Bank Deposit Reference	Select this option to require the workstation operator to select a reason code when adjusting a bank deposit reference.
20 - Require Deposit Reference	Select this option to prompt the workstation operator to enter a reference when creating a new bank deposit. The workstation operator is not obligated to enter a reference at the prompt.

Table 53-4 (Cont.) Cash Management Parameter Options

Option	Description
21 - Require Reference for Receptacle Counts	Select this option to prompt the workstation operator to enter a reference when counting a receptacle. The workstation operator is not obligated to enter a reference at the prompt.
24 - Require Reference for Cash Pull	Select this option to prompt the workstation operator to enter a reference when performing a cash pull. The workstation operator is not obligated to enter a reference at the prompt.
25 - Require Reason on Over/Short	Select this option to require the workstation operator to enter a reason code when posting an operation that finds a variance in values.
26 - Allow Count of Assigned Till	Select this option to allow the workstation operator to count a till that is assigned to a workstation. When you deselect it, you unassign the till from the workstations to count. After upgrading to Simphony version 2.7 MR2, existing customers who want to continue to count assigned tills need to set this option.
27 - Require Check Closed Before Receptacle Close	Select this option to allow the workstation operator to close a till or server banking session only after all checks with assigned users as the check owner are closed. The workstation operator must close all open checks before closing the till or server banking session. Setting this option ensures that a receptacle is available to settle cash tenders to open checks for workstation operators assigned to the receptacle.
28 - Restrict a Single User per Till	Select this option to restrict a till session to only allow one user. When the workstation operator has option **26 - Allow Assigned Receptacle Access** set from the Employee Class, the **Allow All** button is available on the POS client during the assignment operation.
29 - Save Count Progress	Select this option to allow the workstation operator to save an incomplete count sheet when counting a receptacle session.
30 - Enable Change Order Tracking	Select this option to track change order transactions, save, and recall change order requests.
31 - Require Reference for Change Order	Select this option to prompt the workstation operator to enter a reference when submitting a change order request. The workstation operator is not obligated to enter a reference at the prompt.

Table 53-4 (Cont.) Cash Management Parameter Options

Option	Description
32 - Cash Pull Threshold Notification on Transaction Close	Select this option to prompt the workstation operator after completing an active transaction that exceeds the cash pull threshold level.
33 - Prompt for Business Date on Open Bank Deposit	Select this option to prompt the workstation operator to select a business date when opening a bank deposit receptacle. The operator can select the current business date or up to seven dates in the past.
34 - Hide Bank Deposits on Dashboard	Select this option to hide the Bank Deposits tab on the Cash Management Dashboard.
35 - Hide Petty Cash on Dashboard	Select this option to hide the Petty Cash tab on the Cash Management Dashboard.
36 - Hide Safes on Dashboard	Select this option to hide the Safes tab on the Cash Management Dashboard.
37 - Hide Server Banks on Dashboard	Select this option to hide the Server Banks tab on the Cash Management Dashboard.
38 - Hide Tills on Dashboard	Select this option to hide the Tills tab on the Cash Management Dashboard.
39 - Display Employee First for Tills on Dashboard	Select this option to show the Employee column first in the Tills tab on the Cash Management Dashboard. Additionally, when this option is enabled, the Tills Counted column appears in the Bank Deposit tab on the Cash Management Dashboard. When disabled, the Expected column appears in the Bank Deposit tab on the Cash Management Dashboard.
41 - Require Reference for Paid-In when vendor not defined	Select this option to prompt the workstation operator to enter a reference when performing a paid-in transaction without a vendor defined. The workstation operator is not obligated to enter a reference at the prompt. If a vendor is defined, the paid-in transaction follows the configuration of **3 - Require Reference on Use** in the Vendors module. When option **3** is enabled, the workstation operator is required to enter a reference when performing a transaction (such as paid-in to till, safe, or server bank) that requires a vendor.

Table 53-4 (Cont.) Cash Management Parameter Options

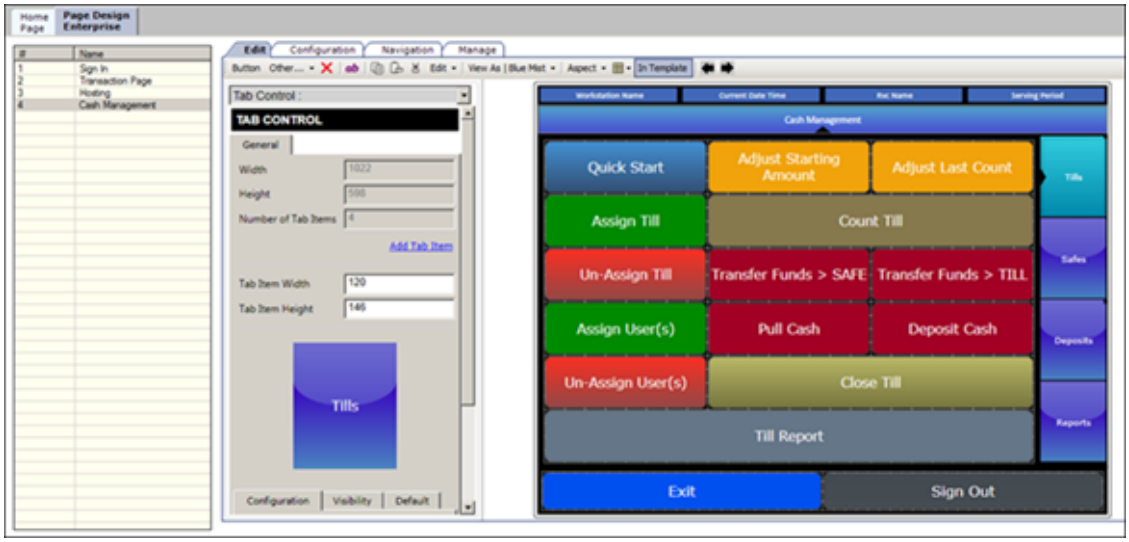
Option	Description
42 - Require Reference for Paid-Out when vendor not defined	Select this option to prompt the workstation operator to enter a reference when performing a paid-out transaction without a vendor defined. The workstation operator is not obligated to enter a reference at the prompt. If a vendor is defined, the paid-out transaction follows the configuration of **3 - Require Reference on Use** in the Vendors module. When option **3** is enabled, the workstation operator is required to enter a reference when performing a transaction (such as paid-out to till, safe, or server bank) that requires a vendor.
43 - Prompt to Confirm Transfer During Close on Count	Select this option to prompt the workstation operator with a confirmation when closing a count and transferring the cash from a till or server bank receptacle to a deposit.
44 - Enforce Close Till and Deposit Till Roles	Select this option to override Role privilege options **210 - Deposit Funds** and **212 - Close Till**. If this option is enabled, Role option **205 - Count Till** is enabled, and **210** and **212** are disabled, the till receptacle does not close after the user performs a count. Configuring ECM Privileges and Permissions contains information on options **210** and **212**.
45 - Prompt for Drawer on Quick Start Till	Select this option to prompt the workstation operator to select the cash drawer on workstations with more than one drawer when performing the **Quick Start Till** function. When **45** is enabled, the **Quick Start Till** function ignores the cash drawer configuration of the workstation operator. On a workstation with a single drawer, the selected till session is automatically assigned to that drawer (if it does not have one already assigned). On a workstation with two drawers, the operator is prompted for a cash drawer when both are available, or auto assigned to the available drawer when one is in use.
46 - Prevent Assignment of Tills with Active Sessions to Cash Drawers	Select this option to show only till receptacles that do not have an active session and are not assigned to a cash drawer when the workstation operator performs either the **Assign Till To Cash Drawer** or the **Quick Start Till** function. When **46** is enabled, a workstation operator cannot assign a till session that has been counted to a cash drawer. The till session needs to be closed and a new one started. You must also select option **28 - Restrict a Single User per Till**.

6. Click **Save**.

Creating Cash Management Touchscreens and Dashboard

Oracle Food and Beverage recommends that you create a page with tabs on which to place the cash management functions. Create and configure tabs to show operations by receptacle type. Create buttons on the page for the required cash management functions listed. The following figure shows an example of a page with cash management functions created in the Page Design module.

Figure 53-2 Cash Management Touchscreen in Page Design



You can also add the Cash Management Dashboard to page layouts using the Page Design module. The Dashboard lets managers view:

- The number of each type of open receptacle
- A summary level and detail view of each type of open receptacle

The Dashboard also includes one-button navigation to open, count, adjust, transfer, and finalize receptacles.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place cash management buttons.
3. On the **Edit** tab, select the page area in which to define the cash management functions.
4. Create tabs for Safe, Bank Deposit, Till, Server Bank, Petty Cash, General, and Payments.
5. On each tab, create buttons for each of the functions listed in the following table.

Table 53-5 Cash Management Tabs and Buttons

Tab	Button Name	Function
Safe	Add Funds	Add money to the safe.

Table 53-5 (Cont.) Cash Management Tabs and Buttons

Tab	Button Name	Function
	Adjust Count	Correct values from the previous count.
	Change Count Sheet	Adjust the count sheet that workstations operators use to perform a count.
	Close Receptacle	Close the safe's tracking session.
	Count Receptacle	Count the money in the safe.
	Deposit Cash	Deposit cash from the safe to a bank deposit.
	Open New Change Order Request	Open a Change Order when a safe is low on a particular denomination or to stock up for an event.
	Open New Receptacle	Open a new safe tracking session.
	Paid-In	Accept funds for the safe outside of a guest check.
	Paid-Out	Distribute funds from the safe outside of a guest check.
	Remove Funds	Remove money from a safe session and from tracking.
	Transfer Funds	Transfer money from the safe to another receptacle.
Bank Deposit	Adjust Bank Deposit Reference	Change the reference of a bank deposit session.
	Adjust Cash Deposit	Change the amount of a cash deposit that was placed into the bank deposit session.
	Open New Receptacle	Open a new bank deposit tracking session.
	Reconcile Bank Deposit	Close the bank deposit.
	Transfer Funds	Transfer money from the bank deposit to another receptacle.
Till	Adjust Count	Correct values from the previous count.
	Adjust Till Starting Amount	Change the starting amount of a till session after opening it.
	Assign Till to Cash Drawer	Assign a till to a cash drawer.
	Assign User(s) to Till	Assign one or more operators to the till session on the workstation.
	Audit Receptacle (Till)	Perform a count without closing the till session irrespective of the **Close on Count Completion** option.

Table 53-5 (Cont.) Cash Management Tabs and Buttons

Tab	Button Name	Function
	Change Count Sheet	Adjust the count sheet that workstations operators use to perform a count.
	Close Receptacle	Close the till's tracking session.
	Count Receptacle	Count the money in the till.
	Deposit Cash	Deposit cash from the till to a bank deposit.
	Paid-In	Accept funds for the till outside of a guest check.
	Paid-Out	Distribute funds from the till outside of a guest check.
	Pull Cash	Remove cash from the till session.
	Quick Start Till	Quickly assign a workstation operator and till to a cash drawer on the workstation.
	Transfer Funds	Transfer money from the till to another receptacle.
	Unassign Till from Cash Drawer	Restrict the till to a limited number of operations. This function does not close the till.
	Unassign User(s) from Till	Prevent the workstation operator from performing transactions on the till. This function does not close the till.
Server Bank	Adjust Count	Correct values from the previous count.
	Adjust Server Bank Starting Amount	Change the starting amount of a till session after opening it.
	Close Receptacle	Close the server bank's tracking session.
	Count Receptacle	Count the money in the server bank.
	Deposit Cash	Deposit cash from the server bank to a bank deposit.
	Paid-In	Accept funds for the server bank outside of a guest check.
	Paid-Out	Distribute funds from the server bank outside of a guest check.
	Pull Cash	Remove cash from the server bank session.
	Transfer Funds	Transfer money from the server bank to another receptacle.

Table 53-5 (Cont.) Cash Management Tabs and Buttons

Tab	Button Name	Function
Petty Cash	Adjust Count	Correct values from the previous count.
	Close Receptacle	Close the petty cash tracking session.
	Count Receptacle	Count the money in petty cash.
	Deposit Cash	Deposit cash from the petty cash to a bank deposit.
	Open New Receptacle	Open a new petty cash tracking session.
	Paid-In	Accept funds for petty cash outside of a guest check.
	Paid-Out	Distribute funds from petty cash outside of a guest check.
	Transfer Funds	Transfer money from petty cash to another receptacle.
General	Cash Management Dashboard	View the number of each type of open receptacle session, see summary level and detail of each type of open receptacle session, and open, count, adjust, transfer, and finalize receptacle sessions using a button.
	View Receptacle Status	Look at summary information for all receptacle sessions.
	Till Assignment Status (Smart Key)	Determine whether a till is assigned to a cash drawer on the workstation.
Payments	Payment Types (for example, separate buttons for USD, Euro, and Peso)	Receive payment by type of currency.
	Currency Conversion	Convert one currency to another.

6. To add the Cash Management Dashboard:
   a. Click **Button**.
   b. On the **General** subtab, select **Function** from the **Type** drop-down list.
   c. Click the black arrow beneath the **Type** drop-down list.
   d. Select **Cash Management Dashboard**, and then click the **OK** button.
   e. Enter a **Legend** for the button.
   f. Position and size the button on the page. Use the Style arrow to change the color.
   g. Click **Save**.

Configuring a Till Through Extensibility

ECM provides the **Designate till number during assignment** capability through extensibility. When you set the InitiatingCommand.Arguments to a valid receptacle object number, the application attempts to use that till when assigning a till to a workstation. If the till is not found or is assigned to another workstation, the application prompts the workstation operator for the till to assign.

Configuring a Bank Deposit Reference Through Extensibility

ECM allows you to define a bank deposit reference through extensibility using the GetReference entry. Transaction and location information is exposed to extensibility to set values that you can use (if required) in the bank deposit reference. The bank deposit reference entry is based on the following transaction and location information:

- Property Number and Name
- Revenue Center (RVC) Number and Name
- Business Date
- Workstation Number

The extensibility application automatically generates the bank deposit reference. When you set the bank deposit reference value through extensibility, the workstation operator cannot enter or edit the reference value.

Specifying Ad Hoc Reports

You must assign privileges to the employee to run specific property reports related to active receptacle sessions at the property.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type, click **Operations**, click **Ad Hoc Reports**, and then click **Report Options**.
3. Select the appropriate ECM reports.

Table 53-6 ECM Reports

Report	Description
Run Till Report	Provides information about the active till session on the workstation to which the workstation operator running the report is assigned. The printed report shows only values related to the workstation operator's activity.
Run Cash Pull Report	Provides a list of cash pull transactions that have been performed for the business day.
Run Till Banking Report	Provides information about all active till sessions for the location.
Run Safes Report	Provides information about all active safe sessions for the location.

Table 53-6 (Cont.) ECM Reports

Report	Description
Run Paid-In/Paid-Out Report	Provides information about all paid-in and paid-out transactions that were recorded for the business day.
Run Over/Short Detail Report	Provides information about over and short conditions that were recorded for the business day.
Run Bank Deposits Report	Provides information about all active bank deposit sessions for the location.
Run Server Bank Report	Provides information about the active server bank session for the user running the report.
Run Petty Cash Report	Provides information about all active petty cash sessions for the location.
Run Server Banking Report	Provides information about all active server banking sessions for the location.
Run Change Order Report	Provides information about open Change Order sessions for the property.

4. Click **Save**.

ECM Reporting

ECM reporting for receptacles and activity is available at the Enterprise and property hierarchy levels.

Enabling Reports in Enterprise Back Office

Enterprise reports must be assigned to an employee role in Oracle Hospitality Reporting and Analytics before authorized employees can run them. An administrator typically assigns the reports to a role.

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Reports**, and then click **Report Roles**.
2. Highlight a role, and then click **Select**.
3. On the Role Reports screen, click **Add**.
4. Select the report names from the list, and then click **Save**.
5. Create a report category:
    a. Click **Admin**, click **Warehouse**, click **Reports**, and then click **Report Categories**.
    b. Click **Add**.
    c. On the Report Categories screen, enter the **Name** of the new report category, a **Description**, and specify a **Sort Order**.
    d. Click **Save**.

ECM Enterprise Information in Reporting and Analytics Reports

Enterprise reports provide information about active and completed receptacle sessions for the Enterprise in Oracle Hospitality Reporting and Analytics, including the reports listed in the

following table. These reports contain drill-down options to allow simple auditing for all receptacle tracking sessions related to the report. You can filter the results by date, organization, property, revenue center, receptacle type, receptacle, receptacle session, status, and class. (Class information is available only if using Reporting and Analytics version 18.1.)

The Oracle Hospitality Reporting and Analytics User Guide contains detailed information about each report.

Table 53-7 Reporting and Analytics ECM Enterprise Reports

Report	Description
Safe Report	This report contains information about all safe sessions (regardless of their state) for the selected location and business date.
Petty Cash Report	This report contains information about all petty cash sessions (regardless of their state) for the selected location and business date.
Till Report	This report contains information about all till sessions (regardless of their state) for the selected location and business date.
Bank Deposit Report	This report contains information about all bank deposit sessions (regardless of their state) for the selected location and business date.
Bank Deposit Adjustment Report	This report contains information about bank deposit adjustments (amount and references) that were performed for bank deposit receptacles for the selected location and business date.
Server Bank Report	This report contains information about all server bank sessions (regardless of their state) for the selected location and business date.
Count Adjustment Report	This report contains information about count adjustments that were performed for all receptacle tracking sessions for the selected properties.
Starting Amount Adjustment Report	This report contains information about adjustments to starting amounts that were defined for all receptacle sessions for the selected location and business date.
Over/Short Detail Report	This report contains information about over and short conditions that were reported for all receptacle sessions for the selected location and business date.
Paid-In/Paid-Out Report	This report contains information about paid-in and paid-out transactions that were reported for all receptacle tracking sessions for the selected properties.

Table 53-7 (Cont.) Reporting and Analytics ECM Enterprise Reports

Report	Description
Activity Report	This report contains information about all transactions and operations that were performed for receptacle sessions for the selected business date. Transactions and operations are listed chronologically, allowing an auditor to view an exact account of all activities performed from open to close for the receptacle session. The Activity Report includes Cash Count Threshold Level and Cash Pull Bypass/Threshold Level notifications for Till, Safe, Server Bank, and Petty Cash receptacles. This report is available through a drill-down from another report and shows only the filter selected from the parent report. For example, the Activity Report shows only the date and time range selected in the parent report. The Class filter is also available and functions when selected within the Activity Report.
Change Order Report	This report contains information about all Change Orders submitted (open) and reconciled (closed) for the selected business date. Saved Change Orders are not shown.
Count Entry Details Report	This report contains information about details entered by the workstation operator during a receptacle count, including all denominated, non-denominated, and reference entries This report is available through a drill-down from the Activity Report for a receptacle count. This report shows only the filter selected from the parent report. For example, the Count Entry Details Report shows only the date and time range selected in the parent report.

ECM Property Reports

Property level reporting at the workstation provides information on active receptacle sessions and transactions to assist in daily operations management. The reports include multiple classes showing additional currency and class details. The summary section for each report shows the currency name, abbreviation, and values (using symbol and separator). You can print these reports to a local printer for the workstation.

Filtering a property report by revenue center is based on the employee operator assignment record, reporting privileges (for each report), and the receptacle location.

You can create front of house buttons for each property report listed in the following table. Workstation Touchscreen Pages contains more information on configuring front of house buttons.

Table 53-8 ECM Property Reports

Report	Description
Bank Deposit Report	This report contains information about active bank deposit sessions for the location.
Cash Pull Report	This report contains information about cash pull transactions posted for the current business date.

Table 53-8 (Cont.) ECM Property Reports

Report	Description
Change Order Report	This report contains information about open Change Order sessions and transactions for the location.
Count Sheet	This report is not selectable, and it prints automatically after completion of a receptacle count. The details shown are for counts entered during a receptacle count, including class totals and over/short values (if applicable).
Over/Short Detail Report	This report contains information about over and short conditions recorded for the current business date.
Paid-In/Paid-Out Report	This report contains information about paid-in and paid-out transactions recorded for the current business date. It is based on the revenue center in which the paid-in/paid-out activity occurred.
Petty Cash Report	This report contains information about active petty cash sessions for the location.
Safes Report	This report contains information about active safe sessions for the location.
Server Bank Report	This report contains information about the active server bank session for the operator signed on to the workstation.
Server Banking Report	This report contains information about active server banking sessions for the location.
Till Banking Report	This report contains information about active till sessions for the location.
Till Report	This report contains information about active till sessions assigned on the workstation.

ECM Workstation Hardware

The following table lists the workstation hardware models and operating systems supported for ECM receptacle operations and functions. Some functionality related to the operation of tills is limited with tablets, handhelds, and other mobile devices. These devices are indicated in the table with an asterisk (*).

The receptacle's tracking session includes ECM tracked transactions that are processed as part of normal guest check operations, regardless of the hardware model or supported operating system from which they originated.

Table 53-9 Workstation Hardware

Model	Operating System	ECM Features Supported?
Oracle MICROS Workstation 6 Series	Oracle MICROS for Linux	Yes
Oracle MICROS Workstation 6 Series	Microsoft Windows 8.1	Yes

Table 53-9 (Cont.) Workstation Hardware

Model	Operating System	ECM Features Supported?
Oracle MICROS Tablet E-Series (8-inch and 11-inch)	Microsoft Windows 8.1	Yes*
Oracle MICROS Workstation 5a	Microsoft Win32	Yes
Oracle MICROS PC Workstation 2015	Microsoft Win32	Yes
Oracle MICROS PC Workstation 2010	Microsoft Win32	Yes
DT Research 362	Microsoft POSReady 7	Yes*
DT Research 365	Microsoft Windows 7	Yes*
Zebra MC40 (formerly the Motorola MC40)	Android 4.1	Yes*
Certified Consumer Devices (Android)	Android 4.4	Yes*

ECM Configuration Levels

The following table lists the hierarchy levels within the EMC that allow configuration of ECM operations.

Table 53-10 EMC Configuration Levels

EMC Configuration Name	Enterprise	Property	RVC	Zone
Accounts	X	X	X	X
Cash Count Threshold Sets	X	X	X	X
Cash Management Classes	X	X	X	X
Cash Management Parameters	X	X	X	X
Cash Management Reasons	X	X	X	X
Cash Pull Threshold Sets	X	X	X	X
Count Sheets	X	X	X	X
Employee Classes		X		
Employee Maintenance	X	X		X
Page Design	X	X	X	X
PAR Level Sets	X	X	X	X
Vendors	X	X	X	X
Templates	X	X	X	X

Table 53-10 (Cont.) EMC Configuration Levels

EMC Configuration Name	Enterprise	Property	RVC	Zone
Receptacles	X	X	X	X
Roles	X			

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Engagement Cloud Service

The Engagement Cloud Service is Simphony's web-based user interface for the Oracle MICROS Tablet E-Series and Workstation 6 Series. The Engagement Cloud Service is deployed and automatically enabled with Simphony installation.

There are two types of pages in the Engagement UI:

- Welcome Page: Initial page that appears on tablet devices. You can assign different Welcome pages to workstations.
- Hub Pages: Pages that appear on the tablet after workstation operators sign on and press the **Hub** button. You can assign different Hub pages to each employee.

Pages can contain widgets that allow you to enhance workstation functionality. For example, you can have daily specials, image slideshows, a Twitter feed, and Oracle Hospitality Reporting and Analytics reports appear on the tablet's touchscreen.

The Engagement UI runs on POS operations and allows you to:

- Configure Welcome and Hub pages
- Assign pages to properties, employees or workstations, or both
- Perform Manager Procedures

System Requirements and Supported Devices

The Engagement module included in Oracle Hospitality Simphony version 19.1 works with Oracle Hospitality Enterprise Back Office version 9.0 (or later).

The Engagement service is supported on workstations running the Microsoft Windows 8.1 and 10 operating systems.

You can use Engagement on the following devices:

- Oracle MICROS Tablet E-Series 8-inch and 11-inch models
- Oracle MICROS Tablet 700 series
- Oracle MICROS Workstation 6 Series
- Oracle MICROS Compact Workstation 310

Security Precautions

The Engagement feature allows you to configure live tiles and content that appear on a POS client device. Ensure that any external data sources or URLs provided through Engagement are secure and derive from a trusted source.

The URL widget, which shows web content from the configured location, contains built-in security precautions. By default, the URL widget locks the workstation operator into the domain of the link provided. That is, all links on a page that are outside of the domain are disabled to prevent workstation operators from navigating to these links. For example, if you configure a

URL widget for http://www.oracle.com, all links outside of *.oracle.com are automatically disabled for the workstation operator.

Consider the following best practices when configuring the URL widget and POS client device on which it runs.

Internet Security Settings

The browser security settings within the Engagement feature are defined by the settings of Microsoft Internet Explorer. When you change Microsoft Internet Explorer options, (for example, Do not allow cookies) you also change the settings for the Engagement browser.

Do not move security levels below **Medium-high** with **Enable Protected Mode** on for Internet and **Medium-low** with **Enable Protected Mode** off for Local intranet. These are the minimum Engagement security settings. You may increase the security levels if desired.

Trusted Source

Only enter URLs for the widget from a secure and trusted source. Creating links to unverified sources and untrusted websites increases the security risk for your POS client device.

Assigning Privileges for Engagement Administrative Users

You need to assign privileges for Engagement administrative users to access, add, and change new pages or page assignments in the EMC.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Insert a record for the role (for example, host, bartender, server, manager, or administrator), and then click **OK**.
3. Double-click the role type.
4. Click the **EMC Modules** tab.
5. For the **Engagement Page Design** and **Engagement Page Assignment** modules listed in the File column, select one or more of the following privileges:
   - **View**: Grants access to view a module. You must select **View** so that employees in the role can open the module.
   - **Edit**: Allows employees in the role to edit Welcome and Hub pages.
   - **Add**: Allows employees in the role to add Welcome and Hub pages.
   - **Delete**: Allows employees in the role to delete Welcome and Hub pages.
6. Click **Save**.

Language Translation Tasks

Configuring language translation for Engagement consists of completing the following tasks:

- Adding a language to Hub and Welcome pages
- Adding a language to the EMCWeb file
- Adding a language file to the Engagement Configuration application server
- Enabling multi-languages

Adding a New Language to Hub and Welcome Pages

1. Browse to the Engagement Language File directory on the workstation.

   The default installation path is [Drive Letter]:\Micros\Simphony\WebServer\Engagement\LanguageFile\Resources.xml.
2. Copy the Resources.xml file.
3. Rename the file to Resource.CULTURE-CODE.xml, where CULTURE-CODE is the code of the new language you are adding (for example, Resources.fr-FR.xml for French or Resources.es-ES.xml for Spanish).
4. Change the values of the <string> elements of each language entry to the target language.

   Do not change the values of other elements or attributes.

   You can move the number parameters ({0} or {1}) in the language string (left or right of the string text), but do not delete them.
5. Save the changes.

Adding a Language to the EMCWeb File

1. Browse to the Engagement Language File directory on the Simphony application server.

   The default installation path is [Drive Letter]:\MICROS\Install\InstallTools\Text.
2. Copy the EMCWebLanguageStringsEN-US.xml file.
3. Rename the file to EMCWebLanguageStrings.CULTURE-CODE.xml, where CULTURE-CODE is the code of the new language you are adding.

   The file name must include the correct CULTURE-CODE naming convention (for example, EMCWebLanguageStrings.fr-FR.xml for French or EMCWebLanguageStrings.es-ES.xml for Spanish).
4. Change the values of the Text language attribute for each language entry to the target language.

   Do not change the values of the key or screen attributes.

   You can move the number parameters ({0} or {1}) in the language string (left or right of the string text), but do not delete them.
5. Save the changes.
6. To upload translation files to the database, browse to [Drive Letter]:MICROS\Simphony2\Tools\UploadEMCWebLanguageStrings, and run **UploadEMCWebLanguageStrings.exe**.

   You can also run the executable file from a cmd prompt by entering `UploadEMCWebLanguageStrings.exe -f:UploadedFilesPath -db:DbSettingsFile [-alias:DbAlias]`.

Adding a Language File to the Engagement Configuration Application Server

1. Browse to the Engagement Language File folder on the Simphony application server.

The default installation path is [Drive Letter]:Micros\Simphony2\Engagement\EngagementConfig\Languages.

2. Copy the en-US.xml file.
3. Rename the file to CULTURE-CODE.xml, where CULTURE-CODE is the code of the new language you are adding (for example, fr-FR.xml for French or es-ES.xml for Spanish).
4. Change the values of the Text language attribute for each language entry to the target language.

   Do not change the value of the record key attribute.

   You can move the number parameters ({0} or {1}) in the language string (left or right of the string text), but do not delete them.
5. Change the values of the name and code attributes on the second line to the Culture code of the target language (<Language version="32" name="English (US)" code="en-US">).
6. Save the changes.

Setting Multiple Languages

1. Select the Enterprise level, click **Setup**, and then click **Languages**.
2. Double-click a language record.
3. In the **Language Culture** field, enter the abbreviated language code. For example, the code for English - United States is en-US.

   See http://msdn.microsoft.com/en-us/library/ee825488(v=cs.20) for a list of language codes.
4. Repeat Steps 2 and 3 for each language record.
5. Click **Save**.

Engagement Manager Procedures

The Web EMC or Web Configuration Console (WCC) widget enables you to assign one of the following manager procedures to a tile:

Table 54-1 WCC Widget Manager Procedures

Manager Procedure	Allows You To...
Edit Header/Trailer	Edit check headers and trailers for a property or revenue center. If a logo image is available at the Enterprise level from the EMC, you can also add that image to the check header.
Bulk Edit MI Prices	Filter and edit menu item prices by revenue center, major group, family group, screen look up (SLU), menu item class, and a keyword entry.
Copy Menu Item	Add images to menu items. Add new menu items using existing menu item records as a template.

Table 54-1 (Cont.) WCC Widget Manager Procedures

Manager Procedure	Allows You To...
Copy Employee	Add new employees using existing employee records as a template. Add or change an image in an existing employee's profile.

Adding Engagement Manager Procedure Tiles to the Hub Page

1. Log in to the Engagement dashboard, go to the Hub Pages section, and then add a new WCC widget.
2. From the EMC - Properties dialog, select **Copy Employee** as the **Command Type**.
3. (Optional) Enter the **Primary Text** and **Secondary Text** to appear on the widget.
4. (Optional) Select the widget **Size**, and then add a **Tile Image** for the widget.
5. Click **Save**.
6. Repeat Steps 1 through 5 to add tiles to the Hub page for the Edit Header/Trailer, Bulk Edit MI Prices, and Copy Menu Item manager procedures.

Editing the Check Header and Trailer

1. Sign on to the POS client device, and then tap the **Hub** function.
2. Tap the tile configured for the **Edit Header/Trailer** manager procedure.
3. Select a property or revenue center.
4. To edit the header and trailer for guest checks, tap **Guest Check**.
5. To edit the header for a customer receipt, tap **Customer Receipt**.
6. Enter the details to print on the header in the **Header** text fields, and then enter the details to print on the trailer in the **Trailer** text fields.
7. To insert a logo for the header:
   a. Select a Header text field, and then tap **Insert Image**.
   b. Select a logo from the preview.
8. Click **Save**.

Editing Bulk Menu Item Prices

1. Sign on to the POS client device, and then tap the **Hub** function.
2. Tap the tile configured for the **Bulk Edit MI Prices** manager procedure.
3. To edit the price of one menu item:
   a. Enter the menu item's name in the search field, and then tap **Search**.
   b. Tap the **Price** field of the menu item, enter the new menu item price, and then tap **Enter**.
4. To edit the prices of several menu items:

a. Tap **Filter Menu Item**, and then select one or more of the following filter criteria:
   - **Major Group**
   - **RVC**
   - **Family Group**
   - **SLU**
   - **Menu Item Class**

b. Tap the **Price** field of the first menu item on the search results, enter the new menu item price, and then tap **Enter**. The focus moves to the price of the next menu item.

5. Tap **Save**, and then tap **OK** to confirm the changes.

Adding an Employee From a Template

1. Sign on to the POS client device, and then tap the **Hub** function.
2. Tap the tile configured for the **Copy Employee** manager procedure.
3. Tap **Filter Employees**, select the revenue center, the employee role, and the employee class to assign to the new employee.
4. Select an employee from the search results, and then tap **Copy Employee**.
5. Configure the following information for the new employee:

Table 54-2 Configuration Fields for Adding New Employees From a Template

Field or Option Name	Description
First Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
DOB	Select the employee's date of birth.
Hire Date	Enter the date the employee was hired.
(Optional) MagCard ID	Enter the magnetic card number assigned to the employee or swipe the card to enter the card number into the application.
(Optional) Finger Print	If a fingerprint scanner is connected, you can scan the employee's fingerprints into the application.
RVCs	Select the employee's revenue center. You cannot change the primary revenue center of the employee.
Enable Reporting	Select this option to grant the employee access to Oracle Hospitality Reporting and Analytics.
Is Salaried	Select this option if the employee is paid a flat amount.
Pay Rate	Enter the employee's pay rate.
Logon Name	Enter the username to use to sign on to the workstation. If you selected **Enable Reporting**, the employee can use the same username to sign on to Reporting and Analytics.

Table 54-2 (Cont.) Configuration Fields for Adding New Employees From a Template

Field or Option Name	Description
Password	Enter the password to use to sign on to the workstation. If you selected **Enable Reporting**, the employee can use the same username to sign on to Reporting and Analytics.
Confirm Password	Re-enter the password.

6. To add an image to the employee's profile:
   a. Tap **Change Picture**, and then tap **Browse Image**.
   b. Select the employee's image, and then tap **Open**.
7. Tap **Add Employee**, and then tap **Yes** to confirm the insertion.

Deactivating an Employee

Deactivating an employee removes the employee's access to Simphony and the Enterprise Back Office Suite. When an employee is deactivated:

- The employee is clocked out immediately when outside of a transaction.
- The employee can no longer sign on to the Simphony POS client, EMC, Reporting and Analytics, or the Engagement configuration website.

Labor Management shows the deactivated employee's status as Terminated. Use the Labor Management portal to re-hire a deactivated employee.

1. Sign on to the POS client device, and then tap the **Hub** function.
2. Tap the tile configured for the **Copy Employee** manager procedure.
3. Search for and select the employee you want to deactivate.
4. Tap **Deactivate Employee**, and then tap **OK** to confirm.

   The Simphony EMC shows the deactivated employee's status as Is Deleted. The **Is Deleted** option from the Employee Maintenance module is automatically set for the deactivated employee.

Adding a New Menu Item Using an Existing Menu Item as a Template

1. Sign on to the POS client device, and then tap the **Hub** function.
2. Tap the tile configured for the **Copy Menu Item** manager function.
3. Select a menu item that belongs to the same menu item class and print class that you want to assign to the new menu item, and then tap **Copy Menu**.
4. Configure the following details for the new menu item:

Table 54-3 Configuration Fields for Adding New Menu Items From a Template

Field or Option Name	Description
Menu Item Master Name	Enter the new menu item name.
Definition	Select the appropriate menu item definition. If the menu item that you are using as the template has several definitions, all definitions appear in the list.
Menu Item Definition Name	Enter the name for the new menu item definition.
Price	Enter the menu item price.

5. To change the image for the menu item:
   a. Tap **Change Picture**, and then tap **Browse Image**.
   b. Select the new image, and then tap **Open**.
6. Click **Add Menu**, and then tap **OK** to confirm the insertion.

Adding Images to Menu Items

1. Sign on to the POS client device, and then tap the **Hub** function.
2. Tap the tile configured for the **Copy Menu Item** manager function.
3. Select the menu item, and then tap **Update Image**.
4. Tap **Browse Image**, select the menu item image, and then tap **Open**.

Adding or Changing an Employee's Profile Image

1. Copy images to the POS client device using a flash drive or download the images through the Internet.
2. Sign on to the POS client device, and then tap the **Hub** function.
3. Tap the tile configured for the **Copy Employee** manager procedure.
4. Select an employee, and then tap **Preview**.
5. Tap **Change Picture**, and then tap **Browse Image**.
6. Browse to and select the employee's image, and then tap **Open**.

   Image files cannot exceed 50 KB in size. The following image file type formats are supported:

   - .bmp
   - .jpeg
   - .png
   - .gif
7. Close the Employee Summary dialog.

Creating Pages for Engagement Users

You can create Engagement pages at the Enterprise level. These pages cannot be overridden at lower levels in the hierarchy.

1. From the dashboard, go to the Pages section, and then tap **View All**.
2. To add a new page from either the Welcome Pages or Hub Pages section, tap **+ Create New Page** in the appropriate section.

   You can define Welcome Pages for the following EMC modules:

   - Workstation
   - Workstation Class

   You can override the Welcome Page assignment at any level in the hierarchy below the Enterprise.

   The Manager Hub Page is based on the Employee Class of the users.
3. Type the name of the page in the text box, and then tap **OK**.

Modifying Pages for Engagement Users

You can modify pages using the controls that appear when you select a page.

1. To make changes to a page, select the page, and then tap **Edit**.
2. To duplicate a page, select the page, and then tap **Clone**.
3. To remove a page, select the page, tap **Delete**, and then tap **OK** to confirm.

Assigning Logos and Colors to Pages

You can define a logo and color palette on Welcome pages. You can add only a logo to Hub pages because the color palette can be inherited from the Enterprise, property, or revenue center level based on the Theme Assignment module configuration.

Image files cannot exceed 1 MB in size. The following image file type formats are supported:

- .bmp
- .jpeg
- .png
- .gif

Copy logo images to the POS client device using a flash drive or download the images through the Internet.

1. Open the page, and then tap anywhere within the grid.
2. Select the color from the **Palette** drop-down list.
3. To add a company logo to the page:
   a. Tap **Open**.
   b. Browse to the logo image file and select it. The directory path appears in the **Logo** field.

4. Tap **Save**.

Assigning Default Welcome and Hub Pages

You can specify the default Welcome and Hub pages in the EMC.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Assignment**.
2. Click the **Configuration** tab, and then select the following pages from the drop-down lists:
   - **Default Welcome Page**
   - **Default Hub Page**
3. (Optional) To configure the Welcome Page conditions, click the **Welcome** tab.
   a. Select a **Condition** from the drop-down list.
   b. Select a **Page** to appear for the condition selected.

      The **Page** options appear in sequence, regardless of your selection in the **Condition** drop-down list.
4. (Optional) To configure the Hub Page conditions, click the **Hub** tab.
   a. Select a **Condition** from the drop-down list.
   b. Select a **Page** to appear for the condition selected.

      The **Page** options appear in sequence, regardless of your selection in the **Condition** drop-down list.
5. Click **Save**.

Widgets

Widgets are tiles that you create to show on Simphony Engagement Cloud Service POS client screens. Widgets allow workstation operators to perform optional tasks and procedures based on the assigned privilege level.

You can assign timing values to three widgets. Timing values affect the duration of time that widgets appear on an idle Engagement POS client device screen. You can assign custom timing values to the following widgets:

- URL Launcher
- Image Slideshow
- Today's Special

Engagement widget timing settings are overridden by **Log Off User When Idle** settings that are configured in the Simphony application, with the exception of the Web Configuration Console (WCC) widget. The WCC widget ignores the Simphony idle client timeout settings; the allowed idle time can be configured in MM:SS. The default timing value setting for the Engagement widgets is twenty seconds.

The IP Camera Widget

The Engagement Internet Protocol (IP) Camera widget is used to display a camera feed on the user interface (UI) screen as a widget. It allows users to view live video from an IP camera configured using the Engagement Widget designer. The IP Camera widget uses the Motion-JPEG (MJPEG) video compression format. MJPEG is a video format in which each frame of

video is sent as a separate and compressed JPEG image. The viewer displays the JPEG images as quickly as they are received and that creates the video.

The IP Camera widget is implemented using an image control to render the camera feeds received as images on the UI screen. A separate media player is not used. The IP Camera widget uses an open source library named MJPEG Decoder available in CodePlex.

The widget initializes the MJPEG decoder by passing an IP camera feed URL, which is configured using the Engagement widget designer. The widget receives the appropriate events whenever a new image is available and draws it on the container image control. The widget works with all resolutions supported by the IP Camera. The image is resized to fit within the widget's dimensions, while it preserves its native aspect ratio in the detail view, regardless of the resolution of the images received. The widget does not save or store images.

The MJPEG Decoder library initiates an asynchronous request to the MJPEG URL provided by the viewer. It then streams the multi-part response data received into separate images as they are received. The library passes each JPEG image to the viewer using an event whenever they are available.

The IP Camera widget supports all network and IP cameras capable of sending a direct MJPEG stream. This does not include cameras that are embedded within a web page. The camera must provide a direct stream of only the MJPEG for the IP Camera widget to successfully display the feed.

The IP Camera widget does not require additional security measures when displaying the IP Camera feed. Administrators should implement security restrictions on the network to explicitly allow workstations to connect to the camera feed. Additionally, the IP camera feed should be configured in a secure manner to ensure that the username and password are included in the URL, if possible.

Adding and Moving Widgets

1. From the Widget list, tap the widget to add.
2. To move the widget to a new grid location:
   a. Tap the widget. A move icon appears.
   b. Tap the move icon, and then tap the new grid location.

      Widgets move based on tapping the left corner (upper left corner on large widgets) and automatically resize when moved to a smaller section of the grid.

Creating Tiles (Adding Widgets to a Page)

1. From the dashboard, tap a page, and then add a widget.
2. (Optional) Enter the **Primary Text**, **Secondary Text**, or both to appear on the widget.

   The secondary text appears beneath the primary text in a smaller font.
3. Select the size for the tile:
   - **Small**: One tile (small square)
   - **Wide**: Two tiles (rectangle)
   - **Large**: Four tiles (square)
   - **Extra Large**: Nine tiles (large square) (Only Today's Special widget supports this size)
4. (Optional) To add a background image to the tile:

a. Tap **Open**.

b. Tap **Upload images(s)**, browse to the location of the image file or type the image URL, and then tap **OK**.

c. If images were previously uploaded, tap **View Album Contents**, and then select the image.

d. Tap **Select** to save an existing image or **Crop** to modify the image, and then tap **Done**.

5. To add the URL Launcher widget:

   a. Enter the URL for the website.

   b. To show the keyboard icon on the tile's top toolbar, tap **Show Keyboard**. This allows workstation operators to tap the keyboard icon to see the tablet keyboard on the tile.

6. To add an Image widget, tap **Open**.

   When adding the Image widget, you configure both the tile image and the image that appears after the workstation operator selects the tile. If you do not add an image, the assigned tile image appears by default.

7. To add an IP Camera Feed widget, enter the web address (URL) of the IP camera's video stream in the **Video URL** field.

   Include the end query that defines the user and password of the camera (for example, http://`CAMERAIPADDRESS`/videostream.cgi?user=`USERNAME`&pwd=`PASSWORD`&resolution=32&rate=0).

8. To add a PDF Viewer widget, enter the directory path to access the PDF document in the **URL** field.

   You must install a PDF reader application, such as Adobe Acrobat Reader, on the POS client device to use this widget.

9. To add a Twitter widget, add a hashtag or account in the **Query text** field (for example, #oracle or @oracle).

10. To add an InMotion Chart widget, select the **Report** and the data to appear by default from the **Chart** drop-down list.

11. To add a Slideshow Item widget:

    a. Tap **Slideshow Item**, and then tap **Open**.

    b. Enter the primary and secondary text that appears on the image during the slideshow.

    c. To add images to the slideshow, tap **Add More**.

    d. To remove an image from the slideshow, tap **Delete Item**.

12. To add a Today's Special widget:

    a. Enter the name of the tile in the **Header Text** field, and then select a **Template**.

       - Template1 shows each menu item individually during image rotation.
       - Template2 shows each menu item and a preview pane of other menu items during image rotation.

    b. Tap **Menu Item** to add an image, enter the menu item name in the **Title** field, and then enter a **Description** of the menu item.

       - The Oracle MICROS Tablet E-Series 8-inch supports up to 823 characters, including spaces.
       - The Oracle MICROS Tablet E-Series 11-inch supports up to 627 characters, including spaces.

c. Enter the **Price** and additional text or pricing information in the **Extra** field.

d. To assign a time range to show specials for different meal periods:

   i. Tap **Add Group**, expand the **Group** panel, and then tap **Recurrence**.

   ii. Enter a time range in 24-hour format during which the group of menu items appear, and then select either **Daily** or the days of the week when the group of menu items appear.

e. Add as many menu items and groups as needed, and then tap **OK**.

13. To add supported commands, assign one of the available commands to the tile.

    The Command widget does not support adding a tile image.

14. To add a Weather widget for weather updates:

    a. To use the default service provider, select **wunderground** from the **Provider** drop-down list.

    b. To use a different service provider, enter the **API URL**, and then enter the **API Key** to authorize running the weather application programming interface (API).

    c. Enter a city name or postal code in the **Location/Zip Code** field for specific forecasts, and then select the desired temperature scale from the **Scale** drop-down list.

15. To add an EMC widget, select the EMC task from the **Command** drop-down list.

    EMC widgets allow you to assign procedures, functions, and POS client commands to a tile. The EMC tasks are:

    - Clock In
    - Clock Out
    - Update Database
    - Close Application
    - Employee Training
    - Redirect Order Device
    - Edit Menu Item
    - Menu Item Availability
    - Minimize Application
    - Sign In RVC Prompt

16. Tap **Save**.

Adding Command Buttons

You can add command buttons that provide additional ways to perform common POS functions such as clocking in or out, editing menu items, or updating the workstation database. These buttons remain hidden and appear only when a workstation operator swipes the upper or lower area of the tablet touchscreen.

1. From the dashboard, tap either the upper or lower directional arrow, depending on where you want to add the buttons.

   The upper or lower command bars work independently of each other.

2. Tap the plus sign (**+**) in the upper corner.

3. Enter **Primary Text**, select the **Command** to assign the button, and then tap **Save**.

Configuring Widget Timing Values

The following widgets support timing values:

- EMC (WCC)
  - Edit Header/Trailer
  - Bulk Edit MI Prices
  - Copy Menu Item
  - Copy Employee
- Image Slideshow
- Today's Special
- URL Launcher

1. Sign on to the POS client device, and then select a page from the dashboard.
2. Select the widget, and then tap **Edit**.
3. Enter a value in the **Allowed Idle Time** field.
4. Tap **Save**.

List of Widgets

You can add the following widgets to a Welcome or Home page. Welcome and Home pages do not support Hub page widgets.

Table 54-4 Welcome and Home Page Widgets

Widgets for Welcome and Home Pages	Description
URL Launcher 	The URL Launcher enables you assign an image and a web address or URL to a tile. Tapping this tile takes you to the website.
Image 	The Image widget enables you to assign an image or picture to a tile. Tapping this tile increases the image size and shows more detail.
IP Camera Feed 	The IP Camera Feed enables you to directly assign an IP camera feed to a tile. Tapping this tile increases the camera feed screen size. You do not need to assign an image to the tile. You can connect a maximum of three cameras. Creating Tiles (Adding Widgets to a Page) contains more information about the IP Camera Feed widget.

Table 54-4 (Cont.) Welcome and Home Page Widgets

Widgets for Welcome and Home Pages	Description
PDF Viewer 	The PDF Viewer widget enables you to assign a PDF to a tile. Tapping this tile opens the PDF document. Install a PDF reader application on the POS client device to use this widget.
Twitter 	The Twitter widget enables you to assign a Twitter feed to a tile. Tapping this tile increases the size of the Twitter feed view.
Image Slideshow 	The Image Slideshow widget enables you to assign multiple images that rotate for viewing at five-second intervals.
Today's Special 	The Today's Special widget enables you to assign one or more menu items, graphics, descriptions, and prices to a tile. When more than one menu item is configured, the items rotate for viewing at five-second intervals. You can assign a time range to this widget so that different specials cycle based on the times they are being served.
Command Widget 	The Command widget enables you to assign procedures, functions, and POS client commands to a tile. The available commands are: • Clock In • Clock Out • Update Database • Close Application • Employee Training • Redirect Order Device • Edit Menu Item • Menu Item Availability • Minimize Application • Sign In RVC Prompt
Weather 	The Weather widget enables you to assign a weather forecast provider and location to a tile. Purchase an application program interface (API) key to use this widget.

You can add the following widgets to a Hub page.

Table 54-5 Hub Page Widgets

Widgets for Hub Pages	Description
ECM Alert 	The ECM alert widget enables you to view ECM alerts based on cash pull thresholds for till and server bank receptacles. This widget is supported for multiple cash management classes. 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 	The ECM summary widget enables you to view summary information for active ECM receptacles. This widget is supported for multiple cash management classes. The ECM summary widget shows: • Receptacle name • Number of open receptacle sessions for each receptacle type • Current total in base class amount The ECM summary widget also indicates: • Active alerts for a session • Offline open receptacle sessions • Multiple classes
inMotion Charts 	The inMotion Charts widget enables you to assign Oracle Hospitality Enterprise Back Office reports to a tile. When you select this tile, the assigned report generates first, but all other reports are also accessible. Select each report to view more information. The following reports are available: • Sales • Labor Cost • Discount • Sales Per Labor Hour • Check Count • Guest Count • Average Ticket Time
inMotion Stores 	The inMotion Stores widget enables you to view cumulative sales report information from all available outlets, or you can select an individual store from a list that appears when selecting this tile.

Table 54-5 (Cont.) Hub Page Widgets

Widgets for Hub Pages	Description
Labor Cost	The Labor Cost widget enables you to view potential employee overtime labor costs. When you select this tile, alerts inform the supervisor about employees approaching overtime for a particular pay cycle.
WCC (Web Configuration Console) 	The WCC widget enables you to assign one of the following available manager procedures to a tile: • Edit Header/Trailer • Bulk Edit MI Prices • Copy Menu Item

Viewing the Maximum Data Limit for Hosted Engagement Server

You can view the maximum allowable amount and remaining space for uploading widget images to your hosted Engagement server. When adding images for widgets, the data limit (2 GB total) appears on the image upload screen, along with the remaining amount of available space for adding more image content.

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Extension Applications

A POS Client .NET Extension Application is a .NET class library that adds new operations or event handlers to the Simphony POS client.

An Extension Application adds new operations by defining extension methods that are invoked using buttons created in the Page Designer module. Existing operations are extended by implementing event handlers for POS client events. Extension methods and event handlers are able to interact with the POS client using the Extension Application API.

The POS Client Extension Application API is the set of data types used by the Extension Application to interact with the POS client; this interaction includes the ability to add items to a guest check, prompt the user for information, invoke existing operations, evaluate configuration elements (such as employee options), and more.

For Enterprise Cash Management (ECM) users, see Configuring a Till Through Extensibility and Configuring a Bank Deposit Reference Through Extensibility for more information.

Configuring Extension Application Privileges

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type (for example, administrator), and then click the **EMC Modules** tab.
3. In the Touchscreens section, select the appropriate **Extension Application Posting** permissions for the user role. You can grant permissions for the following actions:
   - **View**: Open and view the Extension Application module. If you allow a user to Edit, you must also grant View access (otherwise the user cannot open the module).
   - **Edit**: Update fields or records within the module.
4. Click **Save**.

Enabling Extension Applications

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Extension Application**.
2. Highlight the record for the extension application.
3. Click the ellipsis point (...) button in the **Options** column.
4. To enable the extension application, ensure that **1 - Disable Application** is deselected. To disable the extension application, select **1 - Disable Application**.
5. To configure the extension application to post check data to the Reporting and Analytics database without manual intervention, select **5 - Post extension application data to Reporting and Analytics**.
6. Click **OK** to close the Extension Application Options dialog.
7. Enter information in the following columns:
   - **Type**: The value in this field indicates how extensibility information appears in Reporting and Analytics.

- Enter **0** if extensibility information is needed only at the POS. Extensibility information does not appear in Reporting and Analytics reports.
- Enter **1** to have extensibility information appear in the standard Check Detail Report in Reporting and Analytics.
- Enter **2** to hide the extensibility information in the standard Check Detail Report, but show it in the Check Detail with Extension Data report in Reporting and Analytics.

If you selected option **5** in Step 5, you must enter **2** as the **Type**. Checks for extension applications with **Type 2** will appear in Reporting and Analytics reports.

> **Note:**
>
> DPS posts the following extensibility data:
>
> - Extensibility Type = 1
> - Extensibility Type = 2 (DataLevel != 0 and MaxChars > 1 and MaxItems > 1)
> - Extensibility Type = 2 (DataLevel ==1 but there is no parent link)

- **Data Level**: The default value is 2.
  - Enter **0** to post nothing (no check header nor detail information) to the Reporting and Analytics database.
  - Enter **1** to post only the check header information to the Reporting and Analytics database.
  - Enter **2** to post both the check header and detail information to the Reporting and Analytics database.
- **Max Chars**: Enter the maximum characters to appear (from 1 to 2000) for each extension item. The default value is 200.

  If the data entered through the POS client exceeds the maximum character limit, the data will be truncated and posted to the Reporting and Analytics database; the Direct Posting Service (DPS) log will indicate the exceeded character limit for each entry with a line item message stating Truncating extensibility detail - no data.
- **Max Items**: Enter the maximum extension items to appear (from 1 to 100). The default value is 1.

  If the data entered through the POS client exceeds the maximum item limit, the data will be skipped and a message posted to the Reporting and Analytics database; the Direct Posting Service (DPS) log will indicate the exceeded item limit for each entry with a line item message stating Skipping extensibility detail - max detail reached.
- **Version**: Based on the version of the client that the extensibility application runs on, set the appropriate value in the **Edit Application Content Version** popup window:
  - If your extensibility application runs on a version of the client earlier than 19.2, then set the **Maximum** field to **19.1**.

    > **Note:**
    >
    > The value **19.1** also encompasses versions between 19.1 and 19.2.

- If your extensibility application runs on a version of the client that is 19.2 or later, then set the **Minimum** field to **19.2**.

8. Click **Save**.

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Transaction Services

Transaction Services is a web service that allows Simphony to interface with third-party applications (for example, hotel self-service kiosks or room service devices, menu boards, and Enterprise online ordering). Transaction Services is commonly installed in stadiums that use self-ordering devices. Guests can place orders using a third-party application that interfaces with a Transaction Services client. The client then sends the guest checks to Simphony. To configure Transaction Services, EMC user access privileges are required.

Beginning with Oracle MICROS Simphony version 19.2, there are two types of Transaction Services available for use.

1. **Transaction Services Gen 1**

   Transaction Services Gen 1 is the legacy version of the product that is typically deployed at a local Property and supports a single revenue center (RVC) or group of RVCs.

2. **Simphony Transaction Services (STS) Gen 2**

   The use of STS Gen 2 is supported for Simphony Standard Cloud Service customers (those hosted on the Oracle Hosting Center). Oracle Hosting must complete configuration tasks to enable this functionality. This access is required to support uploading images to a storage service named Oracle Cloud Object Storage. Once your OCI and cloud object storage access has been configured by Oracle Hosting, you can upload images from the Simphony EMC for display on POS workstations or other integrated solutions. STS Gen 2 is optimized for the Simphony product and lets users better handle digital transactions. It does so by being deployable on either an Enterprise (supports multiple tenants) or a property location (supports a single revenue center or group of revenue centers), similar to the way Transaction Services Gen 1 operates.

   If you are using the STS Gen 2 API cloud offering and have more than one POS API Client workstation type available in a revenue center, Oracle Food and Beverage recommends enabling at least two workstation devices which can receive checks and orders as this provides resiliency should one of the workstations become unavailable.

   > **Tip:**
   >
   > Your STS Gen 2 services URL and the OpenId Connect server endpoint values are located on the **Applications** subtab on the **Enterprise Parameters** tab in the EMC. The STS Gen 2 URL represents the base URL for the services exposed in your environment. The remainder of the URL for each of the service endpoints in a given version is consistent regardless of the environment they are deployed in. The OpenID Connect URL represents the base URL for the OpenID Connect endpoints that are used to acquire tokens for use with STS Gen 2. See the *Oracle MICROS Simphony Transaction Services Generation 2 API Reference Guide* for more information on service endpoints and authentication and authorization for STS Gen 2.

The following EMC modules have consumer-facing content fields:

- Menu Item Definitions

- Family Groups
- Condiment Group Names
- Discounts
- Service Charges
- Tender/Media

  See *Configuring Menu Item Definitions, Family Groups, and Condiment Group Names Consumer-Facing Settings* for more information about configuring these specific modules.

  See *Configuring Discounts, Tender/Media, and Service Charges Consumer-Facing Settings* for more information about configuring these specific modules.

Some examples of consumer-facing content includes such information as:

- Consumer Facing Name
- Consumer Item Name
- Consumer Item Description
- Consumer Image URL / Consumer Image Description
- Consumer Family Group Name / Consumer Family Group Description

This content can then be exposed to users during point-of-sale transactions via STS Gen 2.

Additional consumer-facing content can be found and configured in the modules listed below. Each of these modules contain specific Property and Revenue Center location and contact information:

- Enterprise level **Properties**
- Property level **RVC Configuration**

  See *Adding a Property* and *Adding a Revenue Center* for information about configuring these modules.

For Oracle-hosted customers (only), image URLs stored on Cloud Storage should not be distributed and utilized directly by downstream applications. Image URLs are provided to give external systems access to pull images associated with Oracle configuration and then cache those images in a performance appropriate environment for their consumption.

> **Note:**
>
> The Simphony Web Portal's (SWP) Import/Export utility supports accessing all EMC consumer-facing field data.

See the *Simphony Transaction Services API Reference Document* for more information about Transaction Services.

Enabling Simphony Transaction Services Gen 2 for Revenue Centers

To enable Simphony Transaction Services Gen 2 for revenue centers in the EMC:

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.

2. In the Parameters window, click **Options**.
3. In the Options section, select **74 - Enable Simphony Transaction Services Gen 2**.
4. Click **Save**.

Enabling Simphony Transaction Services for Workstations

Starting with Simphony release 19.2, the following steps apply to workstations which are set as POSAPI Clients, and the POSAPI Clients you are upgrading to.

To enable Simphony Transaction Services (Gen1) or (Gen2) workstations:

1. Select the property, click **Setup**, and then click **Workstations**.
2. Click the **General** tab.
3. In the **General Settings** section, enable the following options based on which Transaction Services capabilities you would like to run on your workstations:
   - Enable Simphony Transaction Services (Gen1) Location API
   - Enable Simphony Transaction Services (Gen2) Location API
   - Enable Simphony Transaction Services (Gen2) Cloud API

   Oracle MICROS Food and Beverage recommends locations utilizing Simphony Transaction Services (Gen2) should have multiple workstations configured to receive orders. This ensures if one workstation loses its connection, or is turned off, other workstations are available to receive orders for the configured revenue center(s).

   From the **General** tab, for each workstation you want to run Simphony Transaction Services (Gen2), select the **Enable Simphony Transaction Services (Gen2) Cloud API** checkbox.
4. Click **Save**.

Location-Based API Requirements for Simphony Transaction Services Gen 2

There are several key location-based API requirements for properties using Simphony Transaction Services Generation 2 (STS Gen 2). They are as follows:

- The on-premises implementation of STS Gen 2 requires tokens acquired from the Enterprise Back Office (EBO) Open ID Connect (IDM). When creating API accounts for STS Gen 2 in EBO API Account Management, set the **Client Scope** to either **Both** or **Local**. This allows for tokens acquired for that client to be authorized to use the on-premises API. Tokens are valid for only 14 days; it is recommended that tokens are renewed after 7 days, in order to have enough time to authorize a new token before expiry (in the of event of an unforeseen circumstance, such as missing connectivity).

  Additionally, on-premises components require initial access to the EBO IDM endpoints in order to acquire authentication related details for workstations running the on-premises API. See the *Reporting and Analytics User Guide*, specifically the **Simphony Transaction Services API** topic in Chapter 5, for more information.
- Since HTTPS is a prerequisite for using the on-premises API, ensure that a valid root certification authority backed TLS certificate is loaded onto all workstations using the on-premises API. The certificate must be loaded in the on-premises certificate folder. The default location is `Simphony/STS/oracle.simphony.sts.onpremise/certificate`.

The certificate name must match the host name of the workstation where the on-premises API is running. The extension of the file accepted is pkcs12. Example: hostname.pkcs12.

- The default port for the on-premises API is **5443**. API paths after the base URL are the same as the cloud endpoints, so cloud documentation can be used if necessary. The API path looks similar to the following example: **https://onprem.example.net:5443/api/v1/sample/ABC/locations/biz1**.

Configuring Menu Item Definitions, Family Groups, and Condiment Group Names Consumer-Facing Settings

As stated in the beginning of this chapter, the use of Simphony Transaction Services (STS) Gen 2 in conjunction with configuring consumer-facing content, is currently supported for Simphony Standard Cloud Service customers (those hosted on the Oracle Hosting Center).

See *Transaction Services* for more details about STS Gen 2 support and setup requirements.

Enabling Consumer-Facing Content

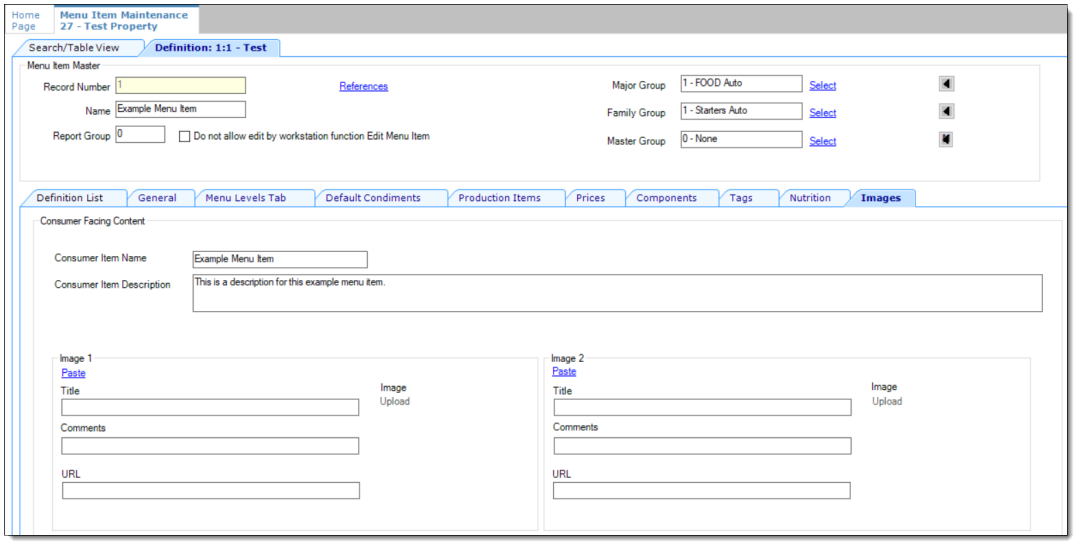
To enable consumer-facing content in the Menu Item Definition, Family Groups, and Condiment Group Names modules, you must first enable STS Gen 2 on a revenue center.

1. Access the EMC, select a revenue center, click the **Setup** tab, and then select **RVC Parameters**.
2. Click the **Options** tab and enable option **74 - Enable Simphony Transaction Services Gen 2**, and then **Save**.

> **Note:**
>
> After enabling option **74 - Enable Simphony Transaction Services Gen 2** in a single revenue center, an **Images** tab shows in the Menu Item (MI) Definitions module for all of the RVCs assigned to the same Property. However, you can only add images to the MI Definitions module where the menu items used by the RVC are located. In other words, if a RVC uses menu items records originating from the enterprise or property levels, this is the MI Definition module location where the Images tab is configurable.

3. Access the enterprise, property, or revenue center level, click the **Configuration** tab, and then click **Menu Item Maintenance**.
4. From the **Record Type** drop-down list, select **Menu Item Definition**, and then click the **Search** button.
5. Select the menu item record you want to assign images to, toggle to Form view, and then click the **Images** tab.

Figure 56-1 Menu Item Definition - Images Tab



6. From the **Consumer Item Name** field, enter the menu item name you want guests to view on the point-of-sale (POS) API device.
7. From the **Consumer Item Description** field, enter a menu item description you want guests to view on the POS API device, and then **Save**.

Adding Images to the MI Definitions and Family Groups Modules

Access to the Image tab differs between the MI Definitions and Family Groups modules. As noted before, the MI Definition module's Image tab only shows upon enabling option 74 in the RVC Parameters module. Access to Family Groups is not determined in the same fashion. The Family Groups module is accessible to anyone who has access privileges to the module, but like the MI Definitions module, no images can be added to Family Groups unless the Oracle Hosting Center establishes an Oracle Cloud Infrastructure (OCI) account with Oracle Cloud Object Storage access.

> **Note:**
>
> If you want to add images to the Family Groups module, access the enterprise, property, or revenue center level, click the **Configuration** tab, select **Family Groups**, select the family group of your choice, and then toggle to Form view. The **Images** tab is available from there.

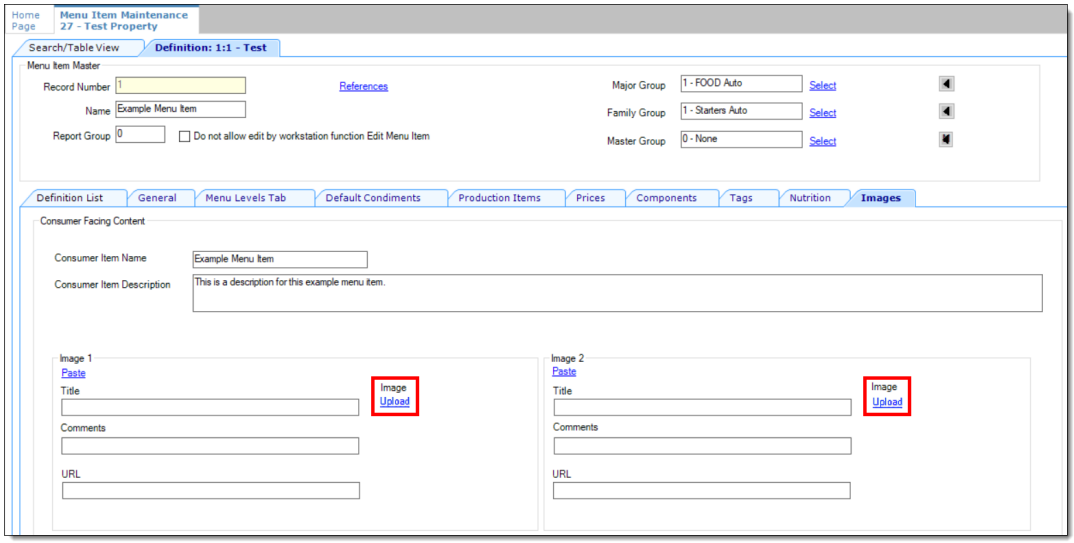
There are several restrictions placed on images and the amount of content you can upload to the Oracle Cloud Object Storage website for this feature. They are:

- Each menu item definition can have up to ten images associated with it.
- Each individual image is restricted to no more than 1 MB in size.
- Only *.JPG, *.PNG, and *.JPEG formatted image files are supported.
- Each organization's total Oracle Cloud Object Storage compartments are restricted to hold no more than 2 GB of image files.

The steps to add images to both the MI Definitions and Family Groups modules are exactly the same. The following steps and examples are shown from the MI Definitions module's perspective.

1. Perform steps 3–7 from the previous section.
   The **Upload** link does not become active and ready for use until Oracle Hosting successfully creates your Oracle Cloud Object Storage account.
2. Click the **Upload** link.

Figure 56-2 Menu Item Definition - Images Tab Upload Link



3. You are prompted to select the image for the menu item you want to upload. When you first click the Upload link and select an image, if the image isn't already stored on the Oracle Cloud Object Storage site, it adds the image to a new bucket in your designated object storage compartment. If you want to replace an existing image, the same method applies by clicking the Upload link and configuring the section in the same manner as described below.

Figure 56-3 Images Tab - Image Handling Section



When an image is successfully uploaded to the cloud object storage site, the image is shown in the applicable image handling section. At the same time, several links become active and additional information auto-populates the form.

To configure an image section, see the instructions in this table:

Table 56-1 Image Handling Section

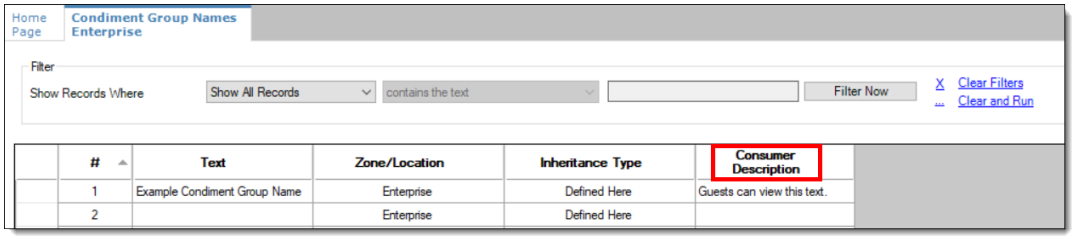
Fields and Links	Description
Paste (link)	Used in tandem with the Copy link. First click **Copy**, and then click **Paste** on any available image configuration section to duplicate an existing image section.
Title (field)	Enter an image name, usually the menu item name.
Comments (field)	Enter a description of the item you are showing.
Copy (link)	Used in tandem with the Paste link. First click **Copy**, and then click **Paste** on any available image configuration section to duplicate an existing image section.
Clear All (link)	Clears all fields for the image, but does not delete the image from the cloud object storage website.
Delete (link)	If you click the Delete link, it deletes the contents of an entire image section and also removes the image from the cloud object storage website. **Note:** If you delete a Menu Item Definition, Family Group Names record, or an entire RVC or Property with any associated images, all images are also deleted from the cloud object storage website. Deletion of unused images is one way to ensure your 2 GB total cloud object storage limit is not exceeded.
Upload (link)	Used to send new images to the cloud object storage website. If you want to replace an existing image, click the **Upload** link, select another image, and the previously used image file is overwritten.
Download (link)	Used to download an existing image from the cloud object storage website and save it to a local disk.
URL (hyperlink to the cloud object storage website where each image is stored)	This field auto-populates upon successfully uploading an image to the cloud object storage website.
Size (field)	Shows the size and dimensions of the uploaded image file. Image files cannot be larger than 1 MB in size.

Configuring a Condiment Group Names Consumer Description

To add consumer-facing text to Condiment Groups:

1. Access the enterprise, property, revenue center, or zone, click **Descriptors**, and then click **Condiment Group Names**.
2. The Condiment Group Names module only opens in Table view. Select a condiment group name, enter your consumer-facing text in the **Consumer Description** field, and then click **Save**.

Figure 56-4 Descriptors - Condiment Group Names Module



> **Note:**
>
> If you want to add consumer facing text to your required or allowed condiments, you can do so. For example, a common condiment menu item class (usually required for preparing steaks) is frequently called **meat temps**. These condiments provide the kitchen with a guest's preferred steak "doneness", such as rare, medium, medium well, and well done. You could add descriptive text to the meat temps condiment class like, "How would you like your steak cooked?", and then guests can select from the available meat temps.

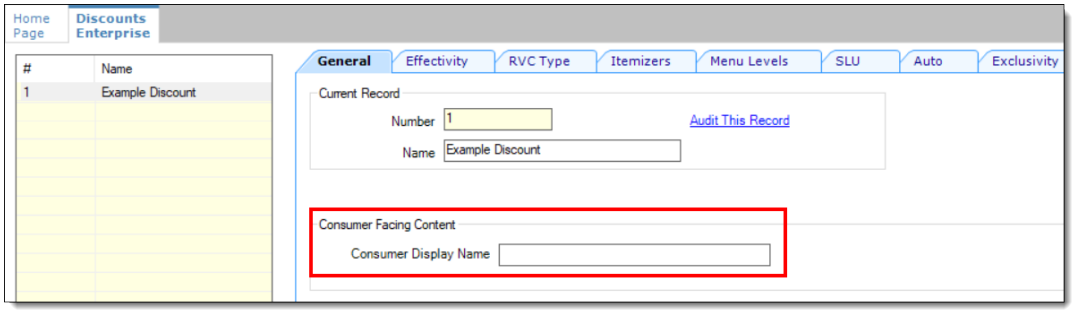
Configuring Discounts, Tender/Media, and Service Charges Consumer-Facing Settings

To configure consumer-facing content in Discounts, Tender/Media, and Services Charges records:

1. Access the Enterprise, property, or revenue center, click **Configuration**, and then click **Discounts**.
2. From the **General** tab, enter the consumer-facing name of the discount in the **Consumer Display Name** field, and then click **Save**.

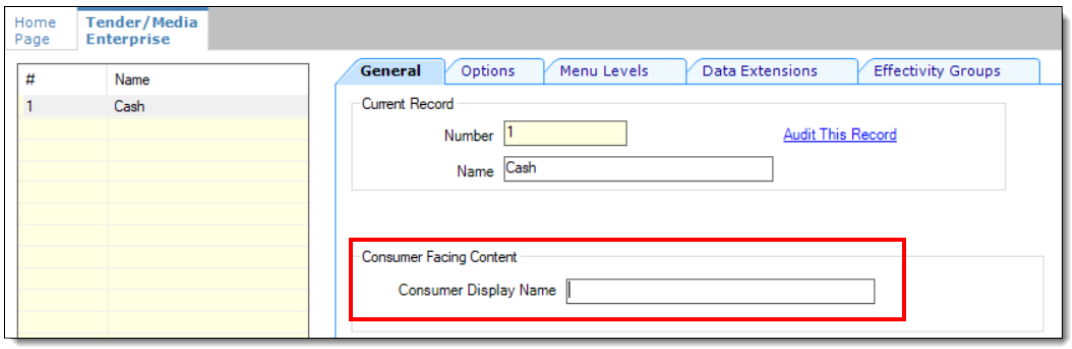
> **Note:**
>
> Each of the these module's consumer-facing content can be edited from either Form View or Table View.

Figure 56-5 Discounts - Consumer-Facing Content



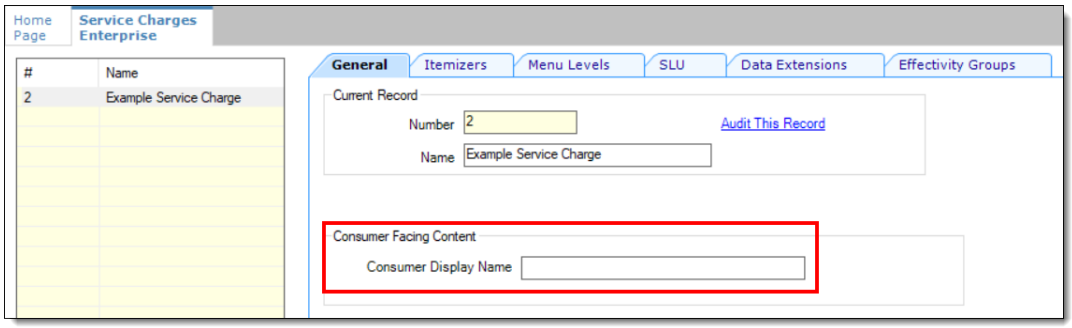
3. Access the Enterprise, property, or revenue center, click **Configuration**, and then click **Tender/Media**.
4. From the **General** tab, enter the consumer-facing name of the tender in the **Consumer Display Name** field, and then click **Save**.

Figure 56-6 Tender/Media - Consumer-Facing Content



5. Access the Enterprise, property, or revenue center, click **Configuration**, and then click **Service Charges**.
6. From the **General** tab, enter the consumer-facing name of the tender in the **Consumer Display Name** field, and then click **Save**.

Figure 56-7 Service Charges - Consumer-Facing Content



Configuring the Transaction Services Workstation Client

You can configure Transaction Services to run on the same hardware device as a Simphony client. Kiosks are usually configured as Transaction Services clients. Obtain the following information before you begin the configuration:

- Transaction Services workstation name
- Number of revenue centers using Transaction Services

POS API client workstations do not run as a Windows Service, and administrators cannot configure Transaction Services as a Windows Service. This is by design. When option **3 - POSAPI Client** is selected as the **Type** in the Workstations module, the **Is Windows Service** field is disabled and greyed out.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Insert a record, enter the workstation name, and then click **OK**.
3. Double-click the workstation record.
4. From the **Type** drop-down list, select **3 - POSAPI Client**.

   POS API client workstations do not run as a Windows Service, and you cannot configure Transaction Services as a Windows Service. This is by design. When option **3 - POSAPI Client** is selected, the **Is Windows Service** field is disabled and greyed out.
5. Select the **Service Host ID** where the workstation runs.

   To host Transaction Services on a separate workstation, select the default **Service Host ID**.
6. In the **Address / Host Name** field, enter the machine where Transaction Services is installed.
7. Enter the **Subnet Mask** and the **Default Gateway** of the workstation to configure.
8. Click the **Service Host** tab.
9. To host Transaction Services and the POS client on a single workstation, select the corresponding Service Host name from the **Service Host** drop-down list.
10. Click the **Transactions** tab.
11. Enter the **Minimum Check Number** and the **Maximum Check Number** to use.
12. From the **Default Order Type** drop-down list, select the order type that the Transaction Services client uses.
13. Ensure that the **Cash Drawer Settings** show **0** (zero).
14. Click the **Order Devices** tab.
15. Select all order devices that use the Transaction Services client for the revenue center shown in the list. If multiple revenue centers use Transaction Services, select the appropriate order devices for each revenue center.
16. Click the **Printers** tab.
17. For each printer, click the **Select** link, and then select the printer to use for each print job.
18. Click the **Revenue Centers** tab.
19. Select the revenue centers in which this instance of Transaction Services operates.
20. Click the **Devices** tab, and then ensure that no peripheral devices appear.

21. Click **Save**.
22. Repeat Steps 1 through 21 for each Transaction Services workstation client.

    If you are using the STS Gen 2 API cloud offering and have more than one POS API Client workstation type available in a revenue center, Oracle Food and Beverage recommends enabling at least two workstation devices that can receive checks and orders as this will provide resiliency should one of the workstations become unavailable.

Configuring the Transaction Services Default Employee

Transactions that are created and altered by the Transaction Services client must be associated with a default transaction employee in Simphony. You need to create an employee record that is not associated with a member of the staff, and is solely used for the Transaction Services client to post records to Simphony.

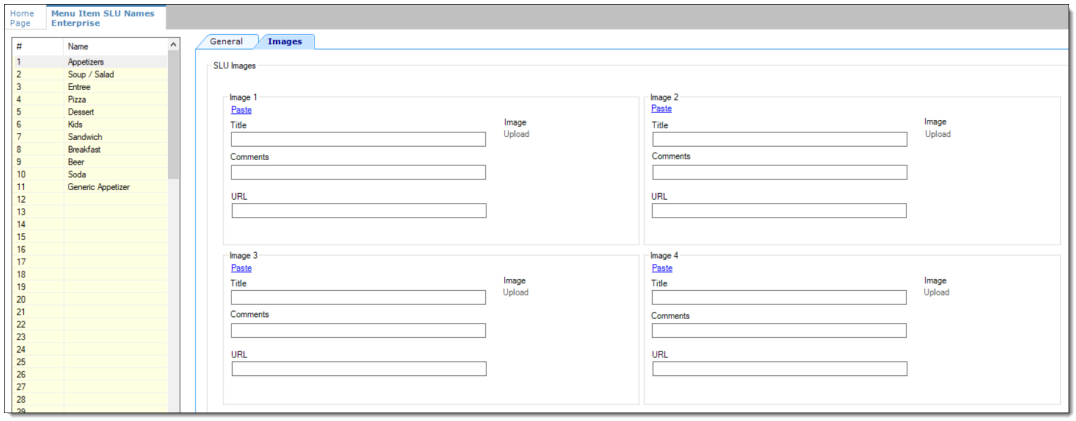
1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
2. Click the **Insert Record** button to add an employee.
3. From the Add Employee dialog box, select **Add Employee From Template**.
4. If you created employees previously, click **Employee to Copy**, and then select an existing employee to copy.
5. Enter the first name and the last name of the employee.
6. Assign the employee with an operator record in the revenue center in which Transaction Services operates. Take note of the employee record number.
7. Select the **Property** and the **Revenue Center**, and then click **OK**.
8. Click **Save**.
9. Go to the POS client workstation, and run the CAL, selecting the workstation you configured through Configuring the Transaction Services Workstation Client.
10. After the CAL installation is complete, navigate to the EGatewayService directory from the workstation, open the web.config file, and then verify that the file contains the correct Api_WorkstationID value.

Associating Images to Menu Item SLUs

The following steps explain how to associate images to Menu Item SLUs. Up to four images can be associated for each Menu Item SLU. Note that you must have the appropriate role privileges in order to access and edit Menu Item SLUs. Additionally, it is required that Simphony Transaction Services Gen 2 (STSG2) be enabled for your enterprises devices, as well as there being an established Oracle Cloud Infrastructure (OCI) account to run in conjunction with the Object Storage device.

1. Select the Enterprise level, click **Descriptors**, and then click **Menu Item SLU Names**.
2. Select the desired SLU record.
3. Click the **Images** tab.
4. To add an image and its details:

Figure 56-8 Menu Item SLU Names Images Tab



a. Click **Upload**, and then select the desired image to upload. Once the image is uploaded, a successful upload message dialog window appears. To upload an external image, enter the image URL in the **URL** field and the image will automatically upload.

> **Note:**
>
> When an image is uploaded, the URL field populates with an Object Storage URL.

b. Enter details for the image in the **Title** and **Comments** fields.

5. Repeat Step 4 for the remaining SLU Images sections.
6. To remove an image and its details:
   - Navigate to any uploaded image, and then click **Delete** or click **Clear All**.
7. To copy the details from an uploaded image to a new image, click **Copy**, and then click **Paste** in any empty image section.
8. To download an image, click **Download**.
9. Click **Save**.

Configuring Menu Item Price and Quantity Override

To configure menu item price override with quantity at the revenue center and employee levels for Transaction Services Gen 1:

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Options** tab.
3. Select **75 - Treat Menu Item Price Override as unit price**.
4. Click **Save**.
5. Select the property, click **Configuration**, and then click **Employee Classes**.
6. Double-click the employee.
7. Click the **Operator Options** tab.

8. In the Options column, click the click the ellipsis (...) point button for the revenue center row, select **29 - Treat Menu Item Price Override as unit price**, and then click **OK**.
9. Click **Save**.
10. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Employee Maintenance**.
11. Search for and select the employee record.
12. Click the **Operator Records** sub tab near the lower area of the screen.
13. In the Options column, click the click the ellipsis (...) point button, select **29 - Treat Menu Item Price Override as unit price**, and then click **OK**.
14. Click **Save**.

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. 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.

Third-party integrators can obtain order detail and status from Simphony in environments where orders enter the Simphony system through the Transaction Services application program interface (API). Third-party applications can query check status (for example, open, assigned, or closed), and the Order Information Service returns all checks that meet the request criteria. The *Oracle Hospitality Simphony Transaction Services API Document* contains information for software engineers developing applications that interface with Simphony using Transaction Services.

Activating the Extension Application for Order Information Service

You need to enable the Order Information Service (OIS) as an extensibility application. No interface is needed.

1. Select the Enterprise, click **Setup**, and then click **Extension Application**.
2. Highlight the record for the **OISClient**, click the ellipsis point (**...**) button in the **Options** column, and then verify that **1 - Disable Application** is deselected.
3. Ensure that the **Interface** column value shows **0 - None**.
4. Click **Save**.

Configuring Touchscreen Order Information Service Buttons

You can create buttons on a page for the Order Information Service functions. You can create multiple buttons with slightly different functions (for example, Delivered All, Delivered Nothing, Delivered Without Alcohol, Delivered Without Food, Delivered Without Retail, and so on).

1. Select the Enterprise, property, or revenue center, click **Configuration** and **Page Design**.
2. Open the page on which to place Order Information Service buttons.
3. From the Edit tab, select the page area in which to define the Order Information Service functions.

4. Click **Button**.
5. From the General subtab, in the **Legend** field, enter the button name (for example, **Assign Multiple Checks**).
6. Select **Function** from the **Type** drop-down list.
7. Click the arrow beneath the **Type** drop-down list.
8. Select **Run Extensibility App**, and then click **OK**.
9. Click the arrow next to the **Arguments** field. The Edit Extensibility Arguments dialog appears.
10. Enter the appropriate extensibility arguments:
    a. Select **dll** from the **Type** drop-down.
    b. In the **appname** field, enter the name of the extension application you created for the Order Information Service (for example, **OISClient**).
    c. In the **filename** field, enter **OISClient.dll**.
    d. In the **function** field, enter one of the following:
        - **Assign**
        - **Close**
        - **CloseAllChecks**
    e. Enter the argument value in the **arg** field, and then click **OK**.

       Order Information Service Functions and Extensibility Arguments contains detailed information about the Assign, Close, and CloseAllChecks functions and the arguments required for each function.
11. Position and size the button on the page. Use the Style arrow to change the color.
12. Click **Save**.
13. Repeat Steps 4 through 12 to create each button. The following table lists the recommended Order Information Service buttons.

Table 56-2 Order Information Service Buttons and Functions

Button Name	Function	Description
Assign Check	Assign	Assign a single check to a delivery agent.
Assign Multiple Checks	Assign	Assign more than one check to a delivery agent.
Delivered	Close	Close a check after all items are delivered successfully.
Delivery Failed	Close	Close a check, voiding all items and returning them to inventory. Use this button when the delivery agent cannot find the guest to deliver the prepared items.
Delivered Without Alcohol	Close	Close a check, voiding the alcohol items and returning them to inventory.
Cancelled	Close	Void all items and close the check to a zero dollar amount. Use this button when the order is canceled prior to being prepared and delivered.

Table 56-2 (Cont.) Order Information Service Buttons and Functions

Button Name	Function	Description
Close All Open Checks	CloseAllChecks	Void all items on every open check and close the checks to a zero dollar amount.
Close All Open Checks by Order Type	CloseAllChecks	Void all items on every open check created for a specific Order Type and close the checks to a zero dollar amount.
Close All Open Checks by Employee	CloseAllChecks	Void all items on every open check created by a specific employee and close the checks to a zero dollar amount.

Order Information Service Functions and Extensibility Arguments

The Order Information Service supports three functions:

- Assign
- Close
- CloseAllChecks

Each function must contain a set of arguments. The following tables describe the extensibility arguments that you must include for each function. Each argument is required unless otherwise indicated.

Table 56-3 Assign Function Arguments

Argument	Description	Example
ID=	Enter anything here (for example, Assigned, AssignedToRunner, TransferredToRunner). This text is visible when Transaction Services queries the check.	`ID=Assigned`
(Optional) MultipleChecks=	To include this argument, set the value to **true**, and the function refers to Assign Multiple Checks. To exclude this argument, set the value to **false**, and the function refers to Assign Single Check.	`MultipleChecks=true`
ServiceTotalNumber=	Enter the object number of the Tender/Media record used when performing the operation (such as the tender used for Service Total).	`ServiceTotalNumber=51`

An example of the **arg** value for the Assign function is `ID=Assigned,MultipleChecks=true,ServiceTotalNumber=51`

Table 56-4 Close Function Arguments

Argument	Description	Example
Reason=	Enter anything here. This text is visible when Transaction Services queries the check.	`Reason=Delivered`
PaymentNumber=	Enter the object number of the Tender/Media record used when performing the operation.	`PaymentNumber=3`
(Optional) VoidParams=	Use this argument to indicate which items to remove from the check before closing it. For example, to delete all items in family groups 1, 2 and 5, set the value to `FG:1:2:5`. FG indicates Family Group. (This is the only recognized value type.) Use `FG=*` to void all items. If you exclude this argument, the function does not allow voids.	`VoidParams=FG:10:11:15:16:30:31:32`
(Optional) OrderTypeFilter=	Use this filter to close checks for the tender set in the payment argument and by a specific order type. If you exclude this argument, the function includes all order types that can use the payment tender.	`OrderTypeFilter=2`

An example of the **arg** value for the Close function is `Reason=Delivered,PaymentNumber=3,VoidParams=FG:10:11:15:16:30:31:32,OrderTypeFilter=2`

Table 56-5 CloseAllChecks Function Arguments

Argument	Description	Example
Reason=	Enter anything here. This text is visible when Transaction Services queries the check.	`Reason=Delivered`
PaymentNumber=	Enter the object number of the Tender/Media record used when performing the operation.	`PaymentNumber=3`
(Optional) OrderTypeFilter=	Use this filter to close checks for the tender set in the payment argument and by a specific order type. If you exclude this argument, the function includes all order types that can use the payment tender.	`OrderTypeFilter=2`

Table 56-5 (Cont.) CloseAllChecks Function Arguments

Argument	Description	Example
(Optional) EmployeeFilter=	Use this filter to close checks for the tender set in the payment argument and by a specific employee. For example, a Transaction Services user creates the checks, so including this employee in the argument closes only the Transaction Services checks. If you exclude this argument, the function closes all employees' checks.	`EmployeeFilter=2`

An example of the **arg** value for the CloseAllChecks function is `Reason=Delivered,PaymentNumber=3,EmployeeFilter=2`

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Cruise Ship Time Zone and Business Day Settings

A cruise ship is a constantly moving property. As a ship moves around the world, the time zone settings for the shipboard systems need to change daily to align with the time zone in which the ship is sailing.

There are two methods of changing the time zone:

- A ship's master clock communicates the current time zone settings. When someone changes the master clock's time zone, all shipboard systems (for example, property management system (PMS) and Simphony) automatically update their settings to ensure consistent date and time stamp posting across all applications.
- A system administrator manually sets the ship's time zone within the PMS and Simphony.

Oracle recommends that you perform the following tasks:

- Close all checks before changing the time zone.
- Change the time zone once per day during a slow period of operations (for example, between 2:00 a.m. and 5:00 a.m.).

Changing the Time Zone

1. Close all checks in the workstations.
2. From the EMC, select the Enterprise level, click **Setup**, and then click **Properties**.
3. Select the new time zone for the ship from the **Time Zone** drop-down list.
4. Click **Save**. The CAL client deploys the new time zone to the property and automatically updates the time zones of the workstations connected to the property.

   Time zones do not update on workstation tablet devices running generic Android operating systems when the property time zone changes. You must manually update the time zone on these devices.

Start of Business Day

In food service and hotel environments, a business day refers to the beginning and end times of a day of business. A business day can have any begin time, but typically a business day starts in the early morning hours during a slow or closed period of operations (for example, 3:00 a.m. or 4:00 a.m.). In contrast, a calendar day always begins at 12:00 a.m.

In a cruise ship environment the PMS controls the business date. Simphony posts cabin charges in the PMS. Simphony and the PMS must be in synchrony to communicate and balance these transactions. When initializing the Start of Day (SOD) on a ship, change the PMS date before changing the Simphony date.

On cruise ships, Simphony allows a manual SOD to run twice in one calendar day. For example, the cabins empty at approximately the same time on a cruise ship, and the financial information resets. The ship's PMS and Simphony are closed out after the last guest leaves the

ship, which is typically between 12:00 p.m. and 1:00 p.m. The SOD changes in the PMS and in Simphony at that time, and the next cruise begins. Both the PMS and Simphony change the SOD again at about 3:00 a.m. the following day when the cruise is under way.

Configuring Start of Day

A system administrator on a ship must take the workstations offline and then manually set the daily start and end times.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the appropriate role type (such as manager), click the **Operations** tab, and then click the **PMC Procedures** subtab.
3. Select the appropriate privileges as described in the following table:

Table 57-1 Start of Day Role Privileges

Privilege Option	Description
30058 - Run Start of Day from OPS	Select this option to allow all employees with the role to increment the business date from the property's Check and Posting Service (CAPS) workstation.
30059 - Prevent Running SOD from OPS with Open Checks	Select this option so that Start of Day cannot run when open checks exist.

4. Click **Save**.
5. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
6. Select the page on which to place the Start of Day button.
7. Add a Start of Day button:
   a. In the **Legend** field, enter **Run Start of Day**.
   b. From the **Type** drop-down list, select **Function**.
   c. Click the arrow beneath the **Type** drop-down list, and then select **Start of Day**.
   d. Position and size the new button on the page.
8. Click **Save**.
9. Select the property, click **Setup**, and then click **Property Parameters**.
10. Click the **Options** tab, and the select **48 - Run Start of Day from OPS**.
11. Click the **Calendar** tab, and then select **Run Manually** for each day of the week.
12. In the **Manual SOD Safety catch time** field, set the time when the application automatically increments the business date if someone forgets to manually run SOD.

    The application checks to see whether SOD occurred within a 24-hour period for the selected property. This time is based on the time zone of the property.
13. Click **Save**.
14. Select the Enterprise level, click **Configuration**, and then click **PC Autosequences**.
15. Insert a PC Autosequence record, name it **Increment Business Day**, and then click **OK**.
16. Open the record and select the **Allowed Properties** to view the autosequence.

17. (Optional) From the Parameters section, click the **Add** link to add parameters. For example, you can enter a property number and exclude a revenue center number.
    a. From the Select Autosequence Parameter dialog, select the **Parameter** from the drop-down list.
    b. Enter a **Value**, and then click **OK**.
18. Click the **Steps** tab.
19. Click the **Add** link to add a step.
20. From the **Step Type** drop-down list, select **3 - Increment Business Date**.
21. Click **Save**.

Workstation Control Privileges

You can configure the control of workstation operations during critical events, such as:

- Running Start of Day
- Locking and unlocking workstations
- Locking and unlocking revenue centers
- Updating workstations
- Reloading workstations

You can set the workstation control privileges for each employee role type (for example, manager, server, and host).

Configuring Workstation Control Privileges

To set the control of workstation operations during critical events:

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role type (such as manager), click the **Operations** tab, and then click the **Miscellaneous** subtab.
3. Select the appropriate privileges:
    - **10019 - Unlock UWS or Revenue Center**: Select this option to allow employees in the role to unlock a workstation or revenue center from the locked dialog.
    - **10020 - Use Workstation Control**: Select this option to allow employees in the role to use the Workstation Control key to access various workstation functions (for example, locking and unlocking workstations and revenue centers, and updating the database). Selecting this option also allows employees to unlock a workstation or revenue center from the locked dialog.
4. Click **Save**.
5. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Page Design**.
6. Select the page on which to place the Workstation Control button.
7. Add a Workstation Control button:
    a. In the **Legend** field, enter **Workstation Control**.
    b. From the **Type** drop-down list, select **Function**.

c. Click the arrow beneath the **Type** drop-down list, and then select **Workstation Control**.

d. Position and size the new button on the page.

8. Click **Save**.

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Interfaces with Simphony

Simphony includes the ability to interface with third-party software, such as Property Management Systems (PMS).

Configuring a Rear Marketing Display (RMD)

The Remote Marketing Display (RMD) feature allows you to connect a secondary display to an Oracle MICROS workstation. This application is configured via the Simphony EMC Data Extensions module, and then can be assigned to workstations with a 10-inch display attached. This extension application only works if there is a secondary display connected to a workstation. If the secondary display is a touchscreen, you have the option to show customers current transaction detail, and then prompt them to confirm their order. If there is change due, a dialog box is shown to customers. The system can also show customized images during a transaction, or videos while the workstation is idle. If video files are placed on workstations through CAL, the application plays designated videos every 5 minutes (by default).

Prerequisites

Supported Hardware

- 10-inch display device
- Oracle MICROS Workstation 6 Series - 610, 620, 625, 650, and 655

> **Note:**
>
> Workstations running Oracle Linux for MICROS are not supported for this feature.

Each workstation with a secondary display needs to be calibrated. See the following topics for more information:

- Calibrating the Workstation and 10-Inch Customer Display in *Oracle MICROS Workstation 6 Series Setup Guide for the 610, 620, and 650*
- Calibrating the Workstation and 10-Inch Customer Display in *Oracle MICROS Workstation 6 Series Setup Guide for the 625 and 655*

Supported Software

- Simphony Workstation Client version: 19.2.x and later
- Images and (optional) videos are used with the RMD and are required to fully configure and utilize the application.

Patch DLL File

Load `OCS2020.dll` from [Drive Letter]:\Program Files\Oracle Hospitality\EMCClient\Extensibility\RearMarketingDisplay. This file is needed to configure the RMD.

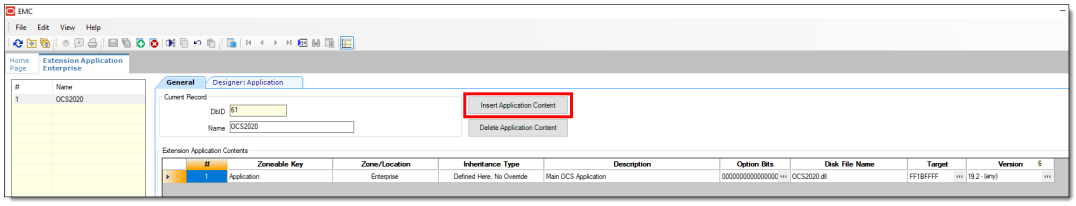
RMD Configuration

To configure this feature, you must have EMC access privileges assigned to your role for the Data Extension, Extension Application, Workstation, and Content modules. To configure the RMD, complete the following steps using the EMC:

Configuring the Extension Application

1. Select the Enterprise or property, click **Setup**, and then click **Extension Application**.
2. Insert a new record and name it **OCS2020**. Toggle to Form view.
3. From the **General** tab, click the **Insert Application Content** button.

Figure 58-1 Extension Application Module

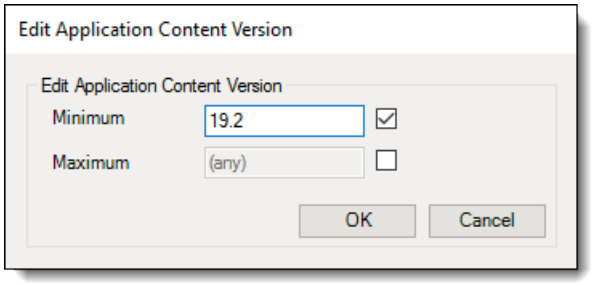


4. Enter the text in the following fields:
   - **Zoneable Key**: Application
   - **Description**: Main OCS Application
5. Click the **Designer** tab.
6. From the **Content Type** drop-down list, select **3 - DLL**.
7. Click the **Import from a file** link, and then select **OCS2020.dll**.

> **Note:**
>
> The **File Name Origin** field auto-fills to reflect the full name of the **OCS2020.dll**.

8. Click the **General** tab, and then enter **OCS2020.dll** in the **Disk File Name** column of the record. Note the **Disk File Name** entry is case-sensitive and **must** be the same as the actual file name, including its file extension.
9. From the **Target** field, click the ellipsis (**…**), enable the **Win32** operating system check box, and then click **OK**.
10. Enter the appropriate Simphony Minimum / Maximum version information in the **Version** field. Click the ellipsis (**…**), select the check box adjacent to the minimum version number, and (in this example), enter **19.2** in the **Minimum** field, and then click **OK**.

Figure 58-2 Edit Application Content Version Window



11. Click **Save**.

Configuring the Data Extension

Configure the data extension record using the EMC. This configuration allows you to enable or disable the RMD application on each workstation. Enable this extension for workstations connected to 10-inch displays.

1. Select the Enterprise, click **Configuration**, and then click **Data Extensions**.
2. Insert a new record.
3. Click the ellipsis (**…**), and then select **41 - Workstations** from the drop-down list in the **Table** column.
4. Enter**RMDEnabled** in the **Extra Column Name** field.
5. From the **Type** column, select **4 - Boolean** from the drop-down list.
6. Enable the following column check boxes:
   - **Is Editable**
   - **Is Viewable**
   - **Is Downloadable**
7. Click **Save**.

Enabling Data Extensions for Workstations

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation record, and then toggle to Form view.
3. Click the **Data Extensions** tab.
4. Enable the check box under the **Value** column for the **RMDEnabled** Data Extension.
5. Click **Save**.
6. Repeat steps 2 through 5 for each workstation that is connected to a secondary display.

Enabling the Rear Display on a Workstation

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation record, and then toggle to Form view.
3. Click the **Options** tab, select the **Display/Security** subtab under the Display Options section, and then select **6 - Enable Rear Display**.
4. Click **Save**.

Adding Images in the Content Module

In order to achieve the best look and feel of your images and videos on the RMD, Oracle MICROS Food and Beverage recommends adhering to the following image dimensions. All dimensions are provided in the form of Width x Height (pixel count).

- **OCSDefaultImage** dimensions should be set to 1914 x 1074 pixels.
- **OCSRightPanelImage** dimensions should be set to 957 x 1074 pixels.
- **OCSBannerImage** dimensions should be set to 957 x 120 pixels.
- **Video** dimensions should be set to 1914 x 1074 pixels.

1. Select the Enterprise, click **Setup** and then click **Content**.
2. Insert a new record and name it **OCSDefaultImage**. Toggle to Form view.
3. From the **General** tab, click the **Content Type** drop-down list, and then select **9 - Image (JPG)**.
4. Click the **Import from a file** link, and then select the image to show when the workstation operator is signed out or the workstation is idle.
5. Insert a new record and name it **OCSRightPanelImage**. Toggle to Form view.
6. From the **General** tab, click the **Content Type** drop-down list, and then select **9 - Image (JPG)**.
7. Click the **Import from a file** link, and then select the image to show on the right panel of the display when a transaction is in progress.
8. Insert a new record and name it **OCSBannerImage**. Toggle to Form view.
9. From the **General** tab, click the **Content Type** drop-down list, and then select **9 - Image (JPG)**.
10. Click the **Import from a file** link, and then select the image or logo to show on the bottom left panel of the display, directly under the check detail window.
11. Click **Save**.

Configuring Touchscreen Buttons in Page Design

This extension application supports two button configurations for the workstation or RMD touchscreen displays.

- **Manage OCS**: This button is used to manage the OCS/RMD application.
  1. Select the Enterprise, click **Configuration**, and then click **Page Design**.
  2. Select the touchscreen on which you want to add the button. Toggle to Form view.
  3. Add a new button and configure it using the following settings:
     a. **Legend**: Manage OCS
     b. **Type**: Function - Run Extensibility App
     c. **Arguments**: appname=OCS2020;type=dll;filename=OCS2020.dll;function=manageOCS;arg=
  4. Click **Save**.
- **Confirm Order**: This button is used to prompt customers to confirm their order and should only be used if the secondary display is a touchscreen.
  1. Select the Enterprise, click **Configuration**, and then click **Page Design**.

2. Select the touchscreen on which you want to add the button. Toggle to Form view.
3. Add a new button and configure it using the following settings:
    a. **Legend**: Confirm Order
    b. **Type**: Function - Run Extensibility App
    c. **Arguments**: appname=OCS2020;type=dll;filename=OCS2020.dll;function=confirmOrder;arg=
4. Click **Save**.

(Optional) Create a CAL Package to Distribute Video Files to Workstations

Create a CAL Package to transfer marketing video files to workstations. This is optional and is not required if the secondary display is not being utilized as a RMD.

- Only videos in MP4 format are supported.
- Video dimensions should be set to 1914 x 1074 pixels.
- A maximum of five videos are supported.
- Video file names must be named like this: movieX.mp4, where X = 1 through 5.
- Video files must be placed in the C:\Micros folder on workstations.
- By default, videos play every 5 minutes starting with movie1.mp4, and then in numerical sequence thereafter.

OPERA PMS Enhanced Interface Features and Requirements

Supported Software and Hardware

- Simphony release 2.8 or later
- OPERA Interface release 8.7.3.7 or later
- Supported POS client devices as of Simphony release 2.8 running the Service Host application.
    - Oracle MICROS PC Workstation 2015
    - Oracle MICROS Tablet E-Series 8 inch (OS 1.5) and 11 inch (OS 1.4)
    - Oracle MICROS Workstation 6 Series
    - Oracle MICROS Workstation 5A (POSReady 2009/7)
    - Android 4.4 tablets
    - Samsung Galaxy 7, 8, 11 inch
    - Google Nexus
    - Zebra MC40 – Android 4.4
    - DT Research DT365
    - Microsoft Windows 7 and 8.1 devices

Posting Capabilities

- Up to 16 Sales Itemizers
- Up to 64 Tax Itemizers

- 16 Discount Itemizers if the **Full Discount and Service Charge Breakdown** is configured accordingly; otherwise 1 Discount Itemizer
- Up to 14 Service Charge Itemizers if the **Full Discount and Service Charge Breakdown** is configured accordingly; otherwise 2 Service Charge Itemizers
- Check Details in the final tender event

Inquiries

- Enhanced inquiry by name or room number returns the following information (varies and depends on the setup on the PMS):
  - Guest last name, first name, and title
  - Arrival and departure dates
  - Room number and room type
- Display of guest reservation detail
- Display of guest history
- Display and printing of guest messages
- Entry of guest messages
- Display of guest locator
- Entry of guest locator

Inserting the Extension Application Files for OPERA

This procedure explains how to install and configure the SIM OPERA Property Maintenance System (PMS) interface. The configuration requires:

- Simphony release 2.8 or later
- OPERA Interface release 8.7.3.7 or later

1. Run the **SIMPH2_ENH_IFC[version number].exe** setup application on the Simphony application server.

   This application verifies the Simphony installation and copies the following files to the `[Drive letter]:\MICROS\Custom\EnhancedInterface` folder:

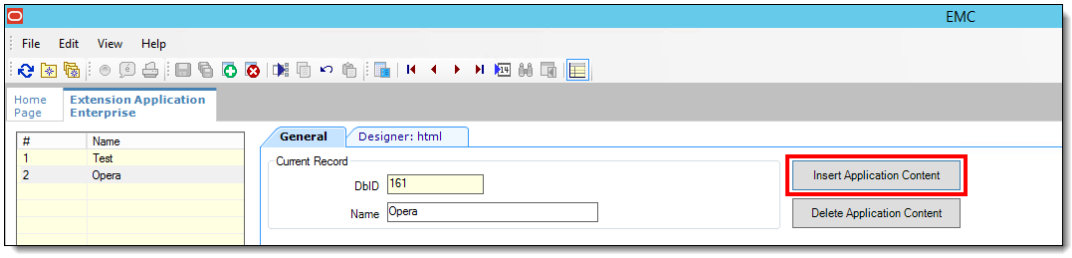
   - CONTENT_EnhIFC_Config.txt
   - McrsExtDialogsML.dll
   - MF_ENH.isl
   - MF_ENH_Android.isl
   - android.htm

2. If you cannot start the setup application on the Simphony application server because of access or user right limitations, but have access to EMC from your local PC, use the /LOCAL parameter to star the application.

   This method only works for version 270. That is, SIMPH2_ENH_IFC270.exe. Running the application through this methods does not verify the Simphony installation, and it is your responsibility to ensure that the Simphony requirements are met. This method copies the required files into the sub-folder `Custom\EnhancedInterface` beneath the folder you selected in the setup application.

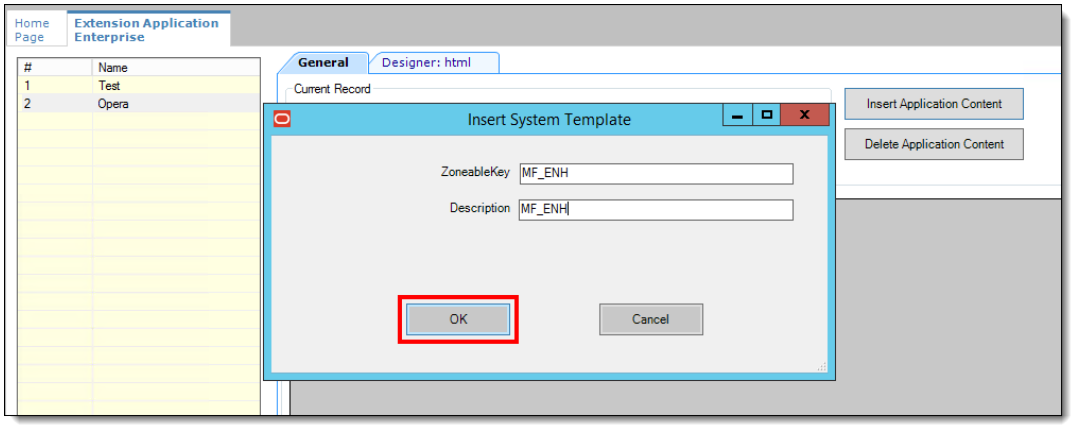
3. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Extension Application**.
4. Click the **Insert** icon to add a record.
5. Enter the record name in the **Name** field (for example, OPERA), and then click **OK**.
6. Double-click the record to open it in form view.
7. On the **General** tab, click the **Insert Application Content** button.

Figure 58-3 Extension Application Insert Application Content Button



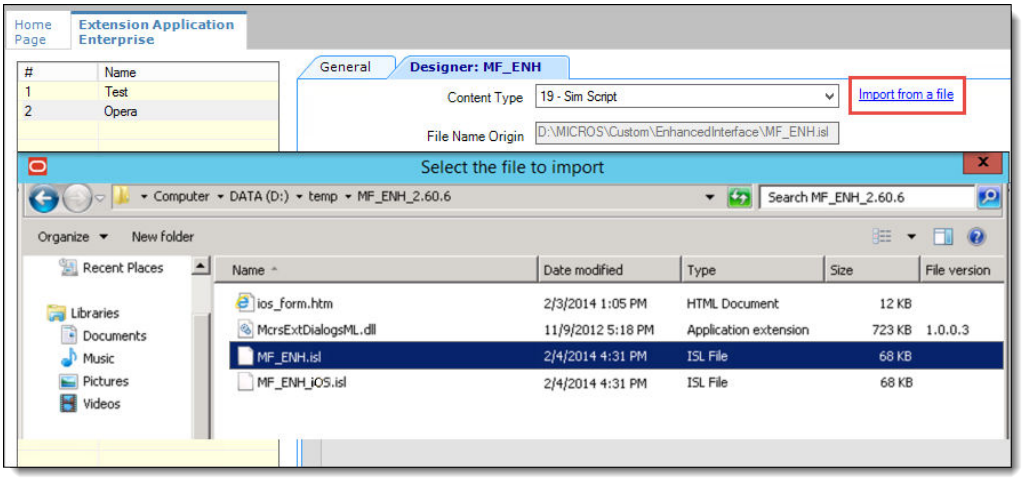
8. Enter `MF_ENH` for both the **ZonenableKey** and **Description** fields, and then click **OK**.

Figure 58-4 Inserting Application Content Records



a. On the **Designer** tab, select **19 - Sim Script** as the **Content Type**.
b. Click the **Import from a file** link.

Figure 58-5 Importing Content From File



c. Browse to and select the MF_ENH.isl file, and then click **Open**.

d. On the **General** tab, enter `MF_ENH.isl` in the **Disk File Name** column.

   Disk File Name entries must exactly match the name of their associated SIM scripts and DLL file names. These entries are case-sensitive.

e. In the **Option Bits** column, click the ellipsis point (...) button, and then select **2 - Main SIM Content**.

f. In the **Target** column, click the ellipsis point (...) button, and then select **1 - Win32**.

9. Repeat Steps 7 through 9 to insert a new application content and import the MF_ENH_Android.isl file with the following settings:

   - **ZonenableKey**: Enter `MF_ENH_ANDROID`.
   - **Description**: Enter `MF_ENH_ANDROID`.
   - **Content Type**: Select **19 - Sim Script**.
   - **Option Bits**: Select **2 - Main SIM Content**
   - **Disk File Name**: Enter `MF_ENH_ANDROID.isl`.
   - **Target**: Select **10 - Android**.

10. Repeat Steps 7 through 9 to insert a new application content and import the McrsExtDialogsML.dll file with the following settings:

    - **ZonenableKey**: Enter `McrsExtDialogsML`.
    - **Description**: Enter `McrsExtDialogsML`.
    - **Content Type**: Select **3 - DLL**.
    - **Disk File Name**: Enter `McrsExtDialogsML.dll`
    - **Target**: Select **1 - Win32**.

11. Repeat Steps 7 through 9 to insert a new application content and import the android.htm file with the following settings:

    - **ZonenableKey**: Enter `html`. The **ZoneableKey** entry for the android.htm file must match html, and it is case-sensitive.
    - **Description**: Enter `html`.

- **Content Type**: Select **23 - Text**.
- **Target**: Select **10 - Android**.

12. Click **Save**.
13. For multi-tenant environments, you must configure the content information as Extension Application content. In these environments the content feature cannot be used.
    a. Insert a new application content for the enhanced interface by clicking the **Insert Application Content** button.
    b. Configure the following fields:
        - **ZonenableKey**: Enter `EnhIFC_Config` (case sensitive).
        - **Description**: Enter `EnhIFC_Config` (case sensitive).
        - **Content Type**: Select **23 - Text**.
        - **Target**: Select **10 - Android**.
    c. Click **Save**.
    d. Insert the content information as outlined in Configuring OPERA Content Information.

Configuring OPERA Content Information

For multi-tenant environments using releases earlier than Simphony release 2.9, you are required to configure the content information as Extension Application content. The content feature cannot be used in these environments.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Content**.
2. Insert a record for the PMS content, named **PMS**.
3. Double-click the new record to open it.
4. Select **4 - String** as the **Content Type**.
5. Enter the following string in the Content tab and make the necessary modifications, as shown in the following figure (the content text file is delivered with the other files).

   See Content Text Settings for the OPERA PMS for more information on the configuration strings.

Figure 58-6 Content Text File

```
#-----------------------------
# Posting related settings
#-----------------------------
#Magnetic Card required for Posting (0 or 1)
MAGCARDONLY=0
#if above enabled, excl. RVC Numbers (separated by comma)
MAGCARDOVRWRT=
#Suppress Guest-Messages during Postings
SUPPRESSGSTMSG=1
#Suppress References of non-Roomcharge Tenders
SUPPRESSNFOREF=0
# Do not display Guest Confirmation during Postings
NO_CONFIRM_GST=0
#Send negative Guest Count if payment is negative
REVERSEGST=1
#Full Discount and Service Charge breakdown
FULL_DSVC=1
#Use 64 Taxes for posting (0 or 1) or just 8 Taxes
POST_64TAXES=1
#Determines which information to be posted, 0 = Serving Period, 1 = Trans.Cashier,
#   2 = Order-Type, 3 = Custom for Philippines ONLY. Default = Serving Period
POSTING_ADD_INFO=0
# Send all CheckDetails on non-Roomcharge Tenders
SendAllDtls=0
#-----------------------------
# Locator related settings
#-----------------------------
#Use RVC Name as Locator Line #1
RVCNAMELOC=1
#Default Locator Validity in Minutes
LOCVALIDMIN=30
#--------------------------------
# Guest Message related settings
#--------------------------------
#Populate first line of Message using Date/Time, RVC# and Trans.Employee#
EMPLINFO_IN_MSG=1
#-----------------------------
# Restricted Posting for Kiosk Environment
#-----------------------------
RESTRICTED_POSTING=1
#Must match the ISL Employee Option in Employee Class
RESTR_POSTING_EMPL=8
```

6. (Optional) For debugging purposes, add the line "DEBUG_ON=10".

   This increases the verbosity, adding additional messages in the Egateway.log file.

7. To override the Content, select the **Use Existing Record** option.

   The Content can be overridden by property, zone, or revenue center.

Figure 58-7 Override Record Controls



8. Click **Save**.
9. Restart the Service Hosts.

Content Text Settings for the OPERA PMS

The following tables list the string names and values to be used in the Content module for the OPERA content text file.

Posting Related Settings

Table 58-1 Posting Related Settings

Configuration String	Configuration Value
MAGCARDONLY	Set to 0 to allow both magnetic cards and keyboard inputs. Set to 1 to limit the entries in the Room Charge event to magnetic cards.
MAGCARDOVRWRT	When `MAGCARDONLY` is enabled, you can overwrite the setting for certain revenue centers by entering a list of revenue center numbers (separated by comma).
SUPPRESSGSTMSG	Set to 1 to suppress the message indicator during posting. Enable this setting for high-volume sites.
SUPPRESSNFOREF	Non-Room Charge tenders show the Department Code for which they were posted. Set to 1 to suppress this reference.
REVERSEGST	Set to 1 to make the guest count negative when the payment is negative (that is, the payment is voided). This feature requires specific configuration on the Front-Office interface to work correctly.
FULL_DSVC	Set to 1 to send the full breakdown of the discounts. This requires a specific version of the Front-Office interface. Set to 2 for an additional full breakdown of the service charges. This includes the full breakdown of discounts.
NO_CONFIRM_GST	Set to 0 if magnetic cards are used to identify guests. Set to 1 to prevent confirmation of the guest name when posting.
POST_64TAXES	Set to 1 to send up to 63 Tax Itemizers to the Front-Office interface. This feature requires IFC8 V.8.7.1.2 or later as well as a certain version of the Front-Office itself. Set to 0 to send only 8 Tax Itemizers to the Front-Office interface.
SendAllDtls	Set to 0 to send only the check details of Room Charges the Front-Office interface. Set to 1 to send also the check details of non-Room Charges.

Table 58-1 (Cont.) Posting Related Settings

Configuration String	Configuration Value
RESTRICTED_POSTING	Select to restrict the response returned from the Front-Office Interface in the Room Charge event. Note that this only works in combination with the option `RESTR_POSTING_EMPL` is configured correctly. There are two values supported: • Set to 1 to require both the room number and at least three characters of the surname (last name) to post the room charge. If less than three characters are provided an error appears. If the response from the PMS contains more than one record, an error appears and the workstation operator must enter additional characters to provide a unique identifier. • Set to 3 to assume that an external device will provide the input as keyboard data. There is no touchscreen keyboard shown when this option is used. The workstation operator (or guest) has only the option to abort the input. If the response from the PMS contains more than one record an error appears and the posting is aborted. There is no confirmation of the guest-name shown, irrelevant of the setting in `NO_CONFIRM_GST`. Note that this feature does not work if the input is restricted to magnetic cards. Therefore, you must either disable the restriction or add the relevant revenue center to the excluded list of revenue centers.
RESTR_POSTING_EMPL	Specify the ISL Option to use with the above option (see ISL Options in the Employee Maintenance module). The valid value for this configuration is between 1 and 8.

Locator and Message Settings

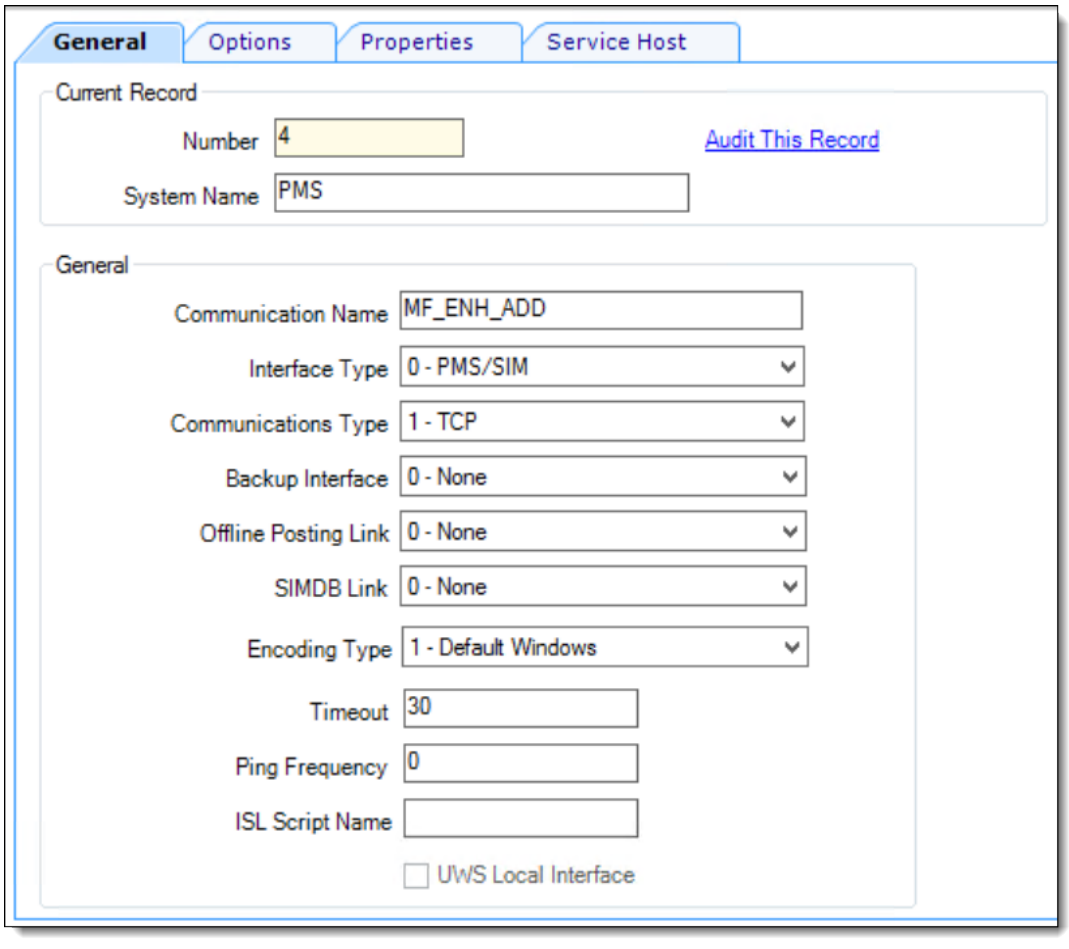
Table 58-2 Guest-Locator and Guest-Message Settings

Configuration String	Configuration Value
RVCNAMELOC	Set to 1 to have the first line of the locator contain the revenue center name, otherwise the locator name is blank. Workstations operator can overwrite this value when entering the locator information.
LOCVALIDMIN	Each new locator is only valid for a certain time. Enter the default time in minutes for which the locator is valid. Workstation operators can overwrite this value when entering the locator information.

Configuring the OPERA PMS Interface

1. Select the Enterprise level, click **Setup**, and then click **Interfaces**
2. Insert a record for the OPERA PMS interface. Enter a **System Name** that reflects the property using the interface.
3. Double-click the new interface record to open it.
4. On the **General** tab, configure the settings as follows:
   - **Communication Name**: Enter the name to use when communicating with the interface.
   - **Interface Type**: Select **0 - PMS/SIM**.
   - **Communication Type**: Select the communication type that the interface uses.
   - **Timeout**: Enter `30`.
   - **Ping Frequency**: Set to 0 (zero) to avoid double posting.

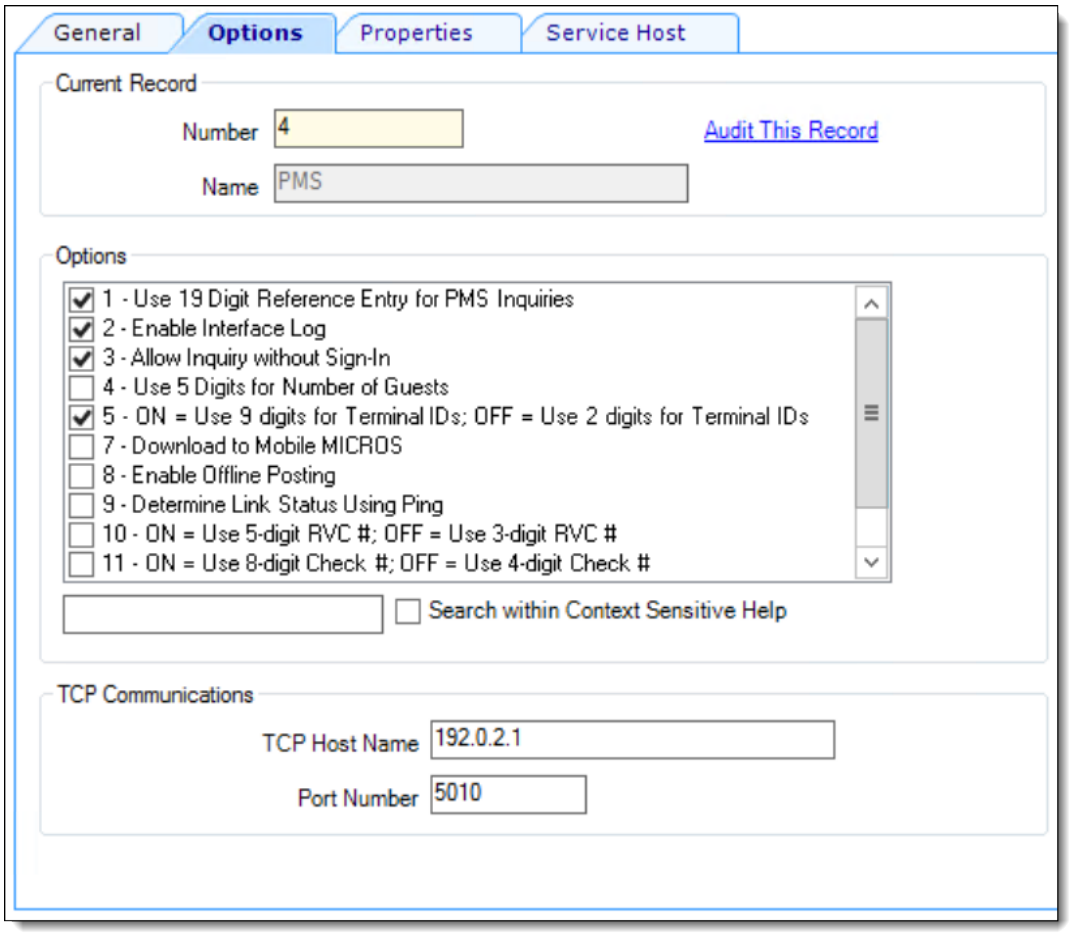
Figure 58-8 Interface Module



5. Click the **Options** tab, and then select the options **1 - Use 19 Digit Reference Entry for PMS Inquiries**, **2 - Enable Interface Log**, **3 - Allow Inquiry without Sign-In**, and **5 - ON = Use 9 digits for Terminal IDs; OFF= Use 2 digits for Terminal IDs**.

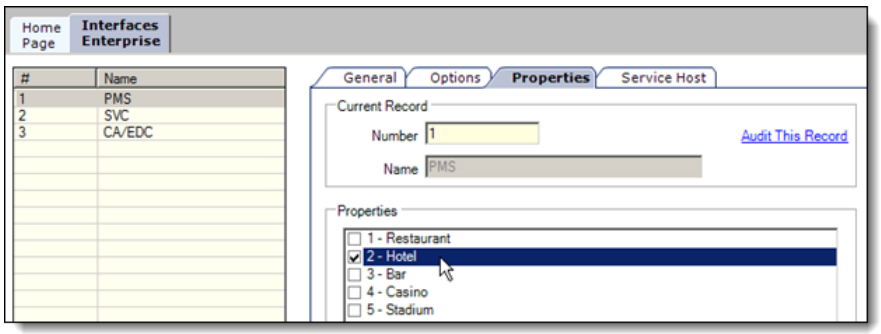
Do not enable option 8, as it causes double posting.

Figure 58-9 Interface Module's Options Tab



6. In the TCP Communications section, enter the following details:
   - **TCP Host Name**: Enter the OPERA PMS application server's IP address or server name (if DNS is enabled).
   - **Port Number**: Enter the port number for the OPERA PMS server.
7. Click the **Properties** tab, and then select the properties that can use this interface.

Figure 58-10 Interface Module's Properties Tab



8. Click the **Service Host** tab, click **Select** adjacent to the **Service Host** field, select the service host to run the OPERA PMS interface, and then click **OK**.

   You can assign any workstation that has enough power to handle the incoming queries as the service host.

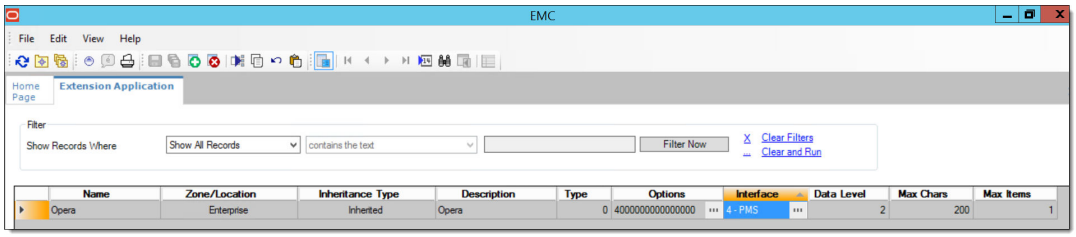
9. Click **Save**.

10. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Extension Application**.

    This configuration typically occurs at the property level when the PMS interface is on-premises.

11. In the Interface column corresponding to the OPERA extension application record, click the ellipsis point (...) button, and then select the **PMS** interface to associate it with the OPERA Extension Application record.

Figure 58-11 Extension Application PMS Interface Assignment



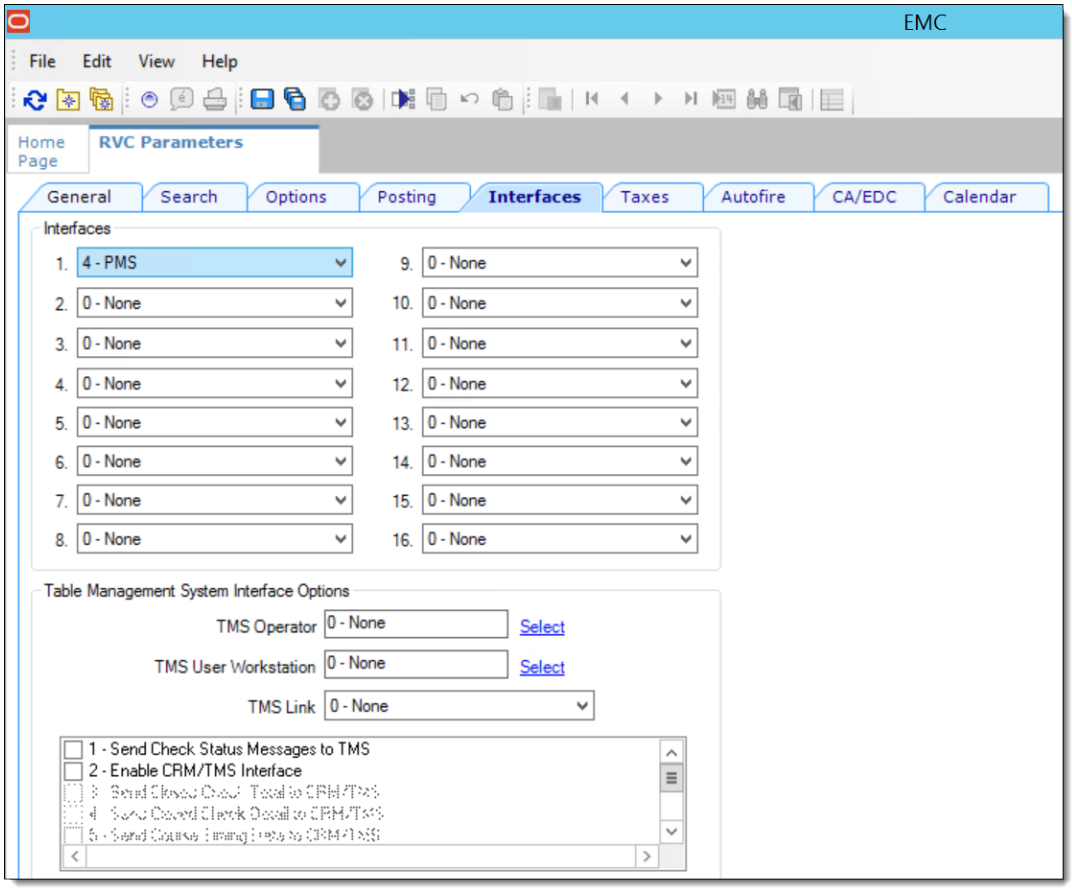
12. Click **Save**.

Enabling the OPERA PMS Interface for a Revenue Center

You must enable the OPERA PMS interface for each revenue center that uses OPERA.

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**
2. Click the **Interfaces** tab.
3. Select the **PMS** interface to enable the OPERA PMS interface for the revenue center.

Figure 58-12 Revenue Center Parameters Interfaces Tab



4. Click **Save**.
5. Repeat Steps 1 through 4 for each revenue center that uses the OPERA PMS interface.

Adding the Tender/Media Data Extension for OPERA

1. Select the Enterprise level, click **Configuration**, and then click **Data Extensions**.
2. Click the **Insert** icon on the toolbar to add a record, and then click **OK**.
3. Enter information in the following fields:

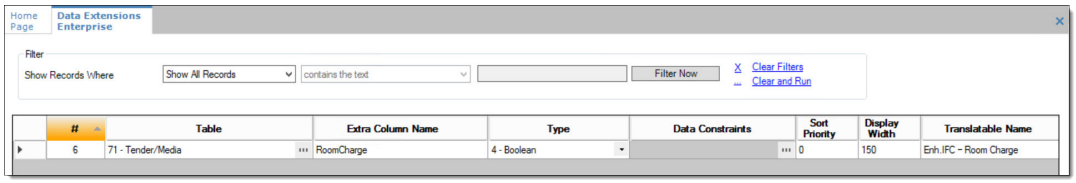
Table 58-3 Data Extension Fields

Field	Description
Table	Select **71 - Tender Media**.
Extra Column Name	Enter **Room Charge**.
Type	Select **4 - Boolean**.
Data Constraints	Not applicable
Sort Priority	Not applicable
Display Width	Enter **150**.
Translatable Name	Enter **Enh.IFC – Room Charge** (translatable).

Table 58-3 (Cont.) Data Extension Fields

Field	Description
Translatable Help	Enter **Enable this for Room-Charge Payments** (translatable).

Figure 58-13 Data Extensions Module

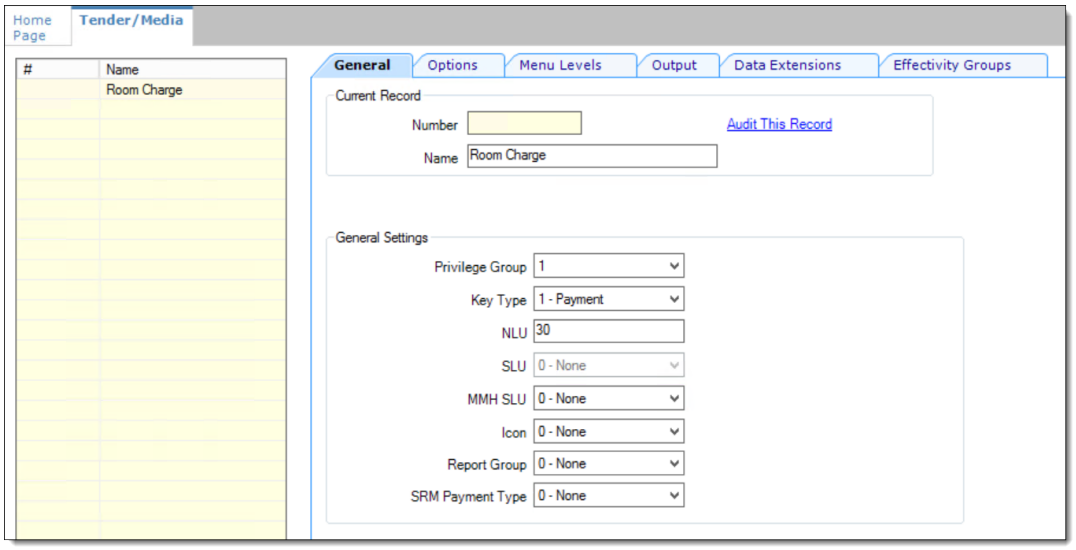


4. Select the following options:
   - **Is Editable**
   - **Is Viewable**
   - **Is Downloadable**
5. Click **Save**.

Configuring the Tender Media for OPERA

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Click the **Insert** icon on the toolbar to add a record, enter **Room Charge** as the name, and then click **OK**.
3. Double-click the Room Charge record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.

Figure 58-14 Tender/Media Room Charge Configuration

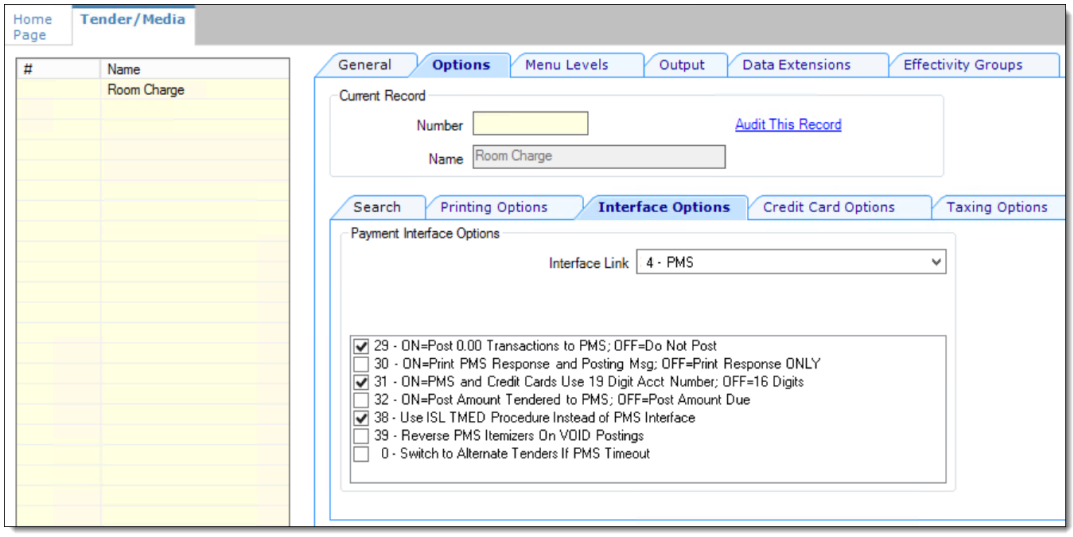


5. Click the **Options** tab, and then click the **Interface Options** subtab.
6. In the **View Interface Names for RVC** drop-down list, select the revenue center for which the OPERA PMS interface was assigned, and then select **PMS** from the **Interface Link** drop-down list.

   The **Interface Link** and the **View Interface Names for RVC** fields are only active if the Tender/Media configuration is being performed at the property level.

   Assign the PMS **Interface Link** to all payments that must be auto balanced (for example, Cash, Credit Cards, and so on).
7. Select the following options:
   - **29 - ON=Post 0.00 Transactions to PMS; OFF=Do Not Post**
   - **31 - ON=PMS and Credit Cards Use 19 Digit Acct Number; OFF=16 Digits**
   - **38 - Use ISL TMED Procedure Instead of PMS Interface**

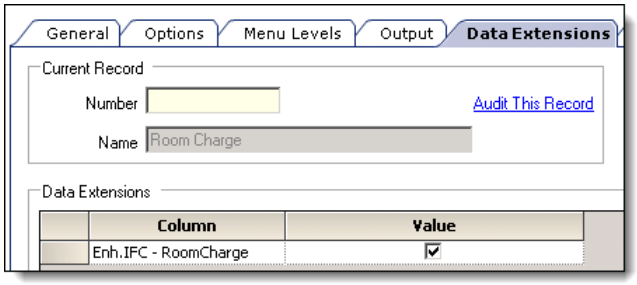
Figure 58-15 Tender/Media Room Charge Options



8. Click the **Ops Behavior** subtab and in the General Options section, ensure that **5 - Reference Entry Required** is not enabled.
9. Click the **Data Extensions** tab, and then select the check box in the **Value** column for the **Enh.IFC – Room Charge**.

   The **Value** check-box must be selected for the room charge tender media(s). Deselect the check-box for all other tender medias.

Figure 58-16 Tender/Media Room Charge Data Extensions Tab



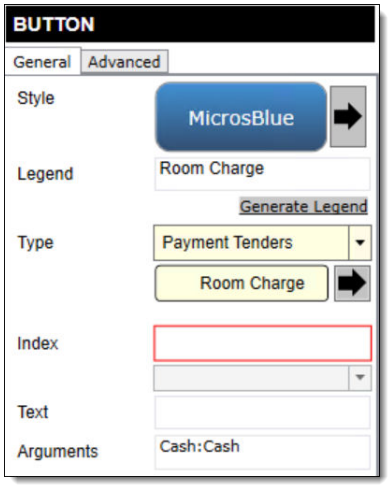
10. Click **Save**.

Configuring the Room Charge Buttons for the OPERA PMS

Oracle recommends that you create payment card buttons on a page for the PMS room charge function.

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the room charge button.
3. On the **Edit** tab, select the page area in which to define the room charge function (typically the payment area).
4. Click **Button**.
5. On the **General** subtab, enter the button name in the **Legend** field.
6. Select **Payment Tenders** from the **Type** drop-down list.
7. In the Select Tender/Media Payment dialog, select the OPERA PMS room charge payment tender, and then click **OK**.
8. In the Select Payment Type area, select **Other1:LoadablePms** from the **Payment Type** drop-down list.
9. Click the **Edit...** link in the Command column.
10. In the Payment Configuration dialog, select the **Opera** payment method from the **Functions** drop-down list.
11. Position and size the button on the page. Use the Style arrow to change the color.

Figure 58-17 Room Charge Payment Button



12. Click **Save**.
13. Add the room inquiry buttons on any required page. Typically, the room inquiry buttons are created on the payment or function page.
    a. Open the page on which to place the Room Charge Inquirye buttons, and then on the **Edit** tab, select the page area in which to define the buttons.
    b. Click **Button**, and then on the **General** subtab, select **Function** from the **Type** drop-down list.

c. Click the black arrow directly beneath the **Type** drop-down list, and then select **Extensibility** from the **Type** pane.

d. Select **SIM Inquire**, and then click **OK**.

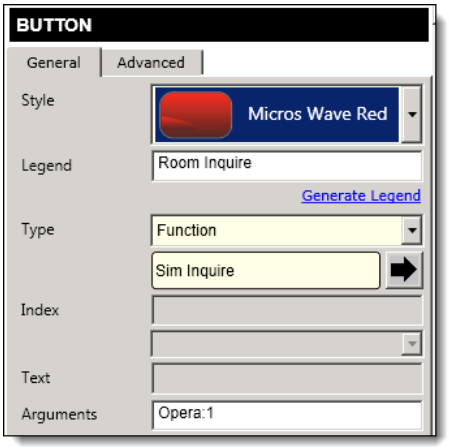
e. In the **Argument** field, enter `<EXTENSION APPLICATION NAME>:<INQUIRY NUMBER>`.

Enter the inquiry number corresponding to the PMS SIM inquiry. For example, enter OPERA:1 to configure a Room Inquire button.

Table 58-4 Inquire Names and Numbers for Room Inquiry Buttons

Inquire	Inquire Number
Room Inquire	1
Info Room Inquire	2
Short Inquire	5
Info Line Inquire	6
View Reservation Inquire	7
Extended Inquire	8
PMS Interface Information Inquire	911

Figure 58-18 Room Charge Inquiry Button



f. Enter a **Legend**.

g. Repeat Steps 13b through 13f to configure buttons for the remaining PMS SIM inquire buttons listed in Step 13e.

- Click **Save**.

14. After the room charge button configurations are complete, perform a full reload of all workstations and restart the service hosts.

Updating the SIM OPERA Interface to a Newer Version

To update an available installation:

1. Run the **SIMPH2_ENH_IFC[version number].exe** setup application on the Simphony application server to update the `[Drive letter]:\MICROS\Custom` folder.

2. Re-import the ISL and DLL files into the Extension Application.

   See Inserting the Extension Application Content for OPERA for more information.
3. Create any additional Data Extensions, if required.
4. Perform a database reload on the workstations and restart the service hosts.

59 Accessibility

This chapter describes the accessibility feature in the EMC and its configuration. Accessibility features aim to make using the product easier for persons with disabilities. Simphony currently supports the high-contrast settings that are provided by the Microsoft Windows operating systems.

Enabling High Contrast Visibility Settings

Enable High Contrast visibility settings based on the operating system that you are running on your computer.

1. To enable high contrast visibility settings with Microsoft Windows 8.x or Microsoft Windows 10:
    a. Click the **Start** button from your computer's Desktop.
    b. Type **high contrast settings** in the **Search** box, and then select **High Contrast** from the list.
    c. Select a high contrast theme from the **Choose a Theme** drop-down list.
    d. Click **Apply**.
2. To enable high contrast visibility settings with Microsoft Windows 7:
    a. Click the **Start** button from your computer's Desktop, and then select the **Control Panel**.
    b. Click **Appearance and Personalization**, and then click **Personalization**.
    c. Click the high-contrast theme that you want to use under **Basic and High Contrast Themes**.

Navigating the Home Page Using Keystrokes

1. To place focus on the Location panel on the left, press **Ctrl+H**.
2. To expand a level (Enterprise or property) to show the locations beneath, press the right arrow key.
3. To move between the locations in the hierarchy, press the up arrow key and the down arrow key.
4. To open a module:
    a. Press **Ctrl+T** to move focus to the tabs on the right, and then press the up arrow key and the down arrow key to move between the tabs.
    b. Press **Tab** to navigate to the first focusable element in the tab.
    c. Continue to press **Tab** to navigate through the modules in the tab.
    d. Press **Enter** to open the module.

Keyboard Shortcuts

EMC supports standard keyboard shortcuts that are used in Microsoft Windows operating systems. Additionally, EMC offers shortcuts to perform tasks that are specific to the application. The following table describes keyboard shortcuts for use with EMC.

Table 59-1 General Keystrokes

Keyboard Shortcut	Result
Tab	Navigates to the next focusable field or element from top to bottom and left to right.
Down Arrow	Varies based on context: • When moving through the location hierarchy in the Home Page, moves one item downward through the list. • In a table, moves to the next row. • When the focus is on a drop-down list, moves to the next item in the list.
Up Arrow	Varies based on context: • When moving through the location hierarchy in the Home Page, moves one item upwards through the list. • In a table, moves to the previous row. • When the focus is on a drop-down list, moves to the previous item in the list.
Right Arrow	Varies based on context: • In a table, navigates to the next column on the right. • When moving through the location hierarchy in the Home Page, expands the location to show the properties or revenue centers beneath.
Left Arrow	Varies based on context: • In a table, navigates to the next column on the left. • When moving through the location hierarchy in the Home Page, collapses the list and sets the focus on the parent location.
Delete	Deletes the record selected.
Enter	Triggers the activity, when the focus is on a link or a button.
Insert	Adds a new record.
Alt+E	Accesses the Edit menu on the toolbar.
Alt+F	Accesses the File menu on the toolbar.
Alt+H	Access the Help menu on the toolbar.
Alt+V	Accesses the (Table or Form) view menu (where applicable) on the toolbar.
Ctrl+C	In Table view, copies the record or records that are selected.
Ctrl+F	Opens the Find dialog which allows you to search for records by entering a search criteria.
Crtl+G	Opens the Go to Record dialog which allows you to go to a record by entering the record's object number.

Table 59-1 (Cont.) General Keystrokes

Keyboard Shortcut	Result
Ctrl+H	In the Home page, moves focus to the location hierarchy.
Ctrl+K	Closes all open modules, including the Home Page, and disconnects the user from the EMC.
Ctrl+O	Opens the EMC Login page when disconnected from the EMC.
Ctrl+P	Print records while in Table view.
Ctrl+Q	Closes the module that is active.
Ctrl+S	Saves the changes.
Crtl+T	Varies based on context: • In the Home page, moves focus to the main tabs. • In Table view, shows or hides the record filters.
Ctrl+V	In Table view, pastes the copied records.
Shift+F10	In Table view, opens the right-click menu when the focus is on a record.
F3/F4	In Table view, allows copy and paste of fields. F3 copies the content in the cell and moves to the cell in the next row. F4 pastes the contents and moves to cell in the next row. This allows you to continually press F4 (or hold it down) and paste the same information to multiple cells in the same column.
F8	Opens the EMC Record Translation dialog.

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Remote Support

Oracle Customer Support agents can use the Remote Support Tool (RST) to securely access Simphony Cloud users' Linux-based workstations and perform support tasks. This includes access to the Linux terminal shell, the Simphony client user interface, and transferring files.

To use the RST, your workstations must be on the Linux platform and your organization must be provisioned for the RST.

The Simphony Cloud upgrade process automatically adds the technical requirements. Simphony Cloud users automatically benefit from the RST as soon as they are provisioned and the Simphony CAL and Simphony POS client are updated.

The option **30070 - Launch/Close Support Session** in the Roles module allows privileged users to launch or close a support session from either POS operations or the Property Management Console (PMC). You can use the Page Design module to add function buttons which launch or close the support session.

On the Linux workstation, Simphony Cloud users can launch the support session and provide the Support Session ID to the Oracle Customer Support agent. The status of the Support Session appears on the workstation (active or connected). Upon completion, the user or the agent can close the support session.

Allowing Employees to Launch and Close a Support Session

You can grant the privilege for Simphony Cloud users to launch or close a support session on Oracle Linux workstations. This privilege must be enabled for the **Launch Support Session** and the **Close Support Session** buttons to be active on the Linux-based workstation.

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. Double-click an employee role.
3. Click the **Operations** tab, click the **PMC Procedures** subtab, and then select **30070 - Launch/Close Support Session**.

   Selecting **30070** allows employees associated with the role to start and close a support session from POS operations or from the Property Management Console (PMC).
4. Click **Save**.

Creating Support Session Buttons

You can use the Page Design module to create two function keys that launch or close a remote support session from a workstation page other than the Property Management Console (PMC) Support page. (The Launch Support Session and Close Support Session buttons automatically appear on the workstation PMC Support page without requiring configuration.)

1. Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
2. Open the page on which to place the support session function keys.
3. On the **Edit** tab, select the page area in which to define the function keys.

4. Click **Button**.
5. On the **General** subtab, enter the key name in the **Legend** field (for example, `Launch Support Session` or `Close Support Session`).
6. In the **Type** drop-down list, select **Function**.
7. Click the black arrow beneath the **Type** drop-down list.
8. In the Edit Command dialog, enter or select the following and then click **OK**.
   - **Name**: Enter `Support`.
   - **Results**: Select `Launch Support Session` or `Close Support Session`.
9. Position and size the button on the page. Use the **Style** arrow to change the color.
10. Repeat Steps 4 through 9 to create the other support session button.
11. Click **Save**.