

Oracle® Symphony

POS User Guide



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ORACLE®

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Preface

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

Purpose

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

Audience

This document is intended for Oracle MICROS Symphony workstation operators.

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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>.

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Revision History

Date	Description of Change
September 2024	Initial publication for Release 19.7.
October 2024	Updated Beginning and Closing a Check in the Guest Checks chapter.

Date	Description of Change
January 2025	Added the following topics to the Menu Items chapter: • Age Verification Plug-in Overview • Menu Item Information Check Detail Selection Plug-in • Menu Item Information Toggle Function Added Applying a Discount Bundle to the Discounts and Service Charges chapter. Updated Error Messages in the Understanding Workstation Messages chapter.
February 2025	Updated the following topics in the Guest Checks chapter: • Reopening a Closed Check • Adjusting a Closed Check • Adjusting a Credit Card Payment • Voiding a Closed Check

1

Basic Workstation Operations

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

Online and Offline Communication Modes

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

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

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

Table 1-1 Workstation Offline Modes and Transaction Handling

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

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

Determining Whether a Workstation is Online or Offline

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

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

Table 1-2 Workstation Communication Mode Indicators in the Workstation Status Bar

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

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

Table 1-3 Workstation Communication Mode Indicators in the Property Management Console

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

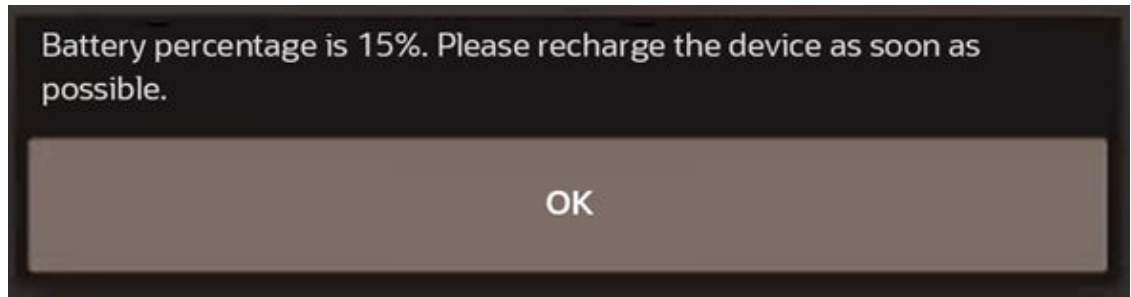
Battery Indicator Warning Messages

Battery indicator warning messages appear on Android mobile phone devices if the battery percentage is 15% or less, advising the server to recharge the device. If the battery percentage is 5% or less, servers cannot use a function that opens a check. Servers need to confirm the battery warning message, and these entries are logged in the Employee Journal Report. The warning messages appear by default and cannot be switched off.

If the battery life on a mobile device is greater than 5% and less than or equal to 15%, a warning message appears after the workstation operator signs in to the POS and when a function is selected that starts a check. The message shows the battery life percentage and

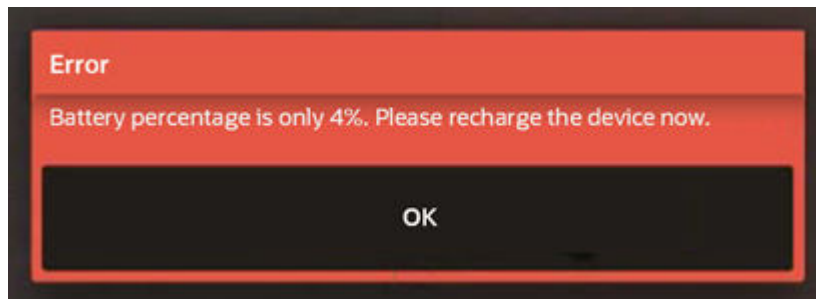
advises the operator to recharge the device as soon as possible. The message must be acknowledged by the operator before continuing, and the acknowledgement is logged.

Figure 1-1 Low Battery Warning



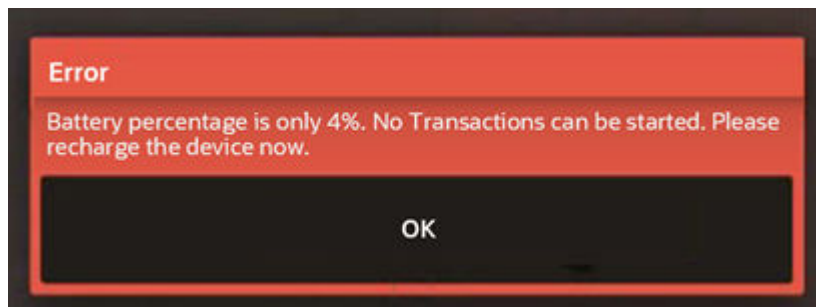
If the battery life on a mobile device is equal to or less than 5%, an error message appears after the workstation operator signs in to the POS, informing the operator to recharge the device now.

Figure 1-2 Critical Battery Warning at Less Than 5 %



An error message appears when a function is selected that opens a check. The operator is prevented from opening the check until the battery percentage is more than 5%.

Figure 1-3 Critical Battery Warning on Open Check Function



A Battery Percentage Warning entry is written to the Employee Journal Report when the battery life is greater than 5% and less than or equal to 15%. An error message is written to the

Employee Journal Report when the battery life is equal to or less than 5%. The journal entry logs the battery percentage and the operator that selected **OK** to the message.

Figure 1-4 Battery Percentage Warning

```

Employee Journal Report
3/14/2023 18:52:57 AM

RVC:ALL
Start Time: 3/14/2023 5:00:00 AM
End Time: 3/15/2023 5:00:00 AM
Employee: 90001 Manager, Ron

=====
TRN 1/41                MAR14'2023 10:50AM
                        POS
                        Garden Restaurant
-----
Battery Percentage Warning
Workstation ID: 42
Battery Percentage: 13%
Authorized By 90001 Manager, Ron
=====
TRN 1/42                MAR14'2023 10:50AM
                        POS
                        Garden Restaurant
=====

```

A Battery Percentage Error is written to the Employee Journal Report when the operator opens a check and the battery life is equal to or less than 5%. The journal entry logs the battery percentage and the operator that selected **OK** to the message.

Figure 1-5 Battery Percentage Error

```

Employee Journal Report
3/14/2023 18:52:57 AM

RVC:ALL
Start Time: 3/14/2023 5:00:00 AM
End Time: 3/15/2023 5:00:00 AM
Employee: 90001 Manager, Ron

=====
TRN 1/47                MAR14'2023 11:21AM
                        POS
                        Garden Restaurant
-----
Battery Percentage Error
Workstation ID: 42
Battery Percentage: 3%
90001 Manager, Ron
=====
CHK 12                GST 0
90001 Manager
TRN 1/48                MAR14'2023 11:22AM
                        POS
                        Garden Restaurant
-----

```

Warning Messages for Unsent Checks

Warning messages appear on Windows and Linux workstations and Android mobile devices when the POS client is disconnected from the Check and Posting Service (CAPS) and there are unsent checks. The messages appear as a translucent yellow banner at the top of all pages outside a transaction. They do not appear when a transaction is in progress so as not to distract from, or slow down, the order taking process.

After posting a transaction, there is a 30-second delay to enable checks to send before a warning message appears. The warnings make the server aware of an issue so that they can either move the device back into network range or alert a manager that there is a connection issue.

The warning messages show the number of unsent transactions on the device so that when a solution is found, servers can see the number decrease and know that the issue has been resolved. Warnings appear by default and cannot be switched off.

When a workstation operator selects a function that starts or picks up a check, the warning message disappears. This includes options such as **Adjust Closed Check**, **Pickup Check**, and **Begin Autofire Check** (not just the **Begin Check** functions).

The message disappears if tapped. This allows access to buttons or status bar information under the message. The message will reappear when there is another unsent check or if the workstation operator changes pages.

Figure 1-6 Unsent Check Warning on Workstation and Tablet Sign In Page

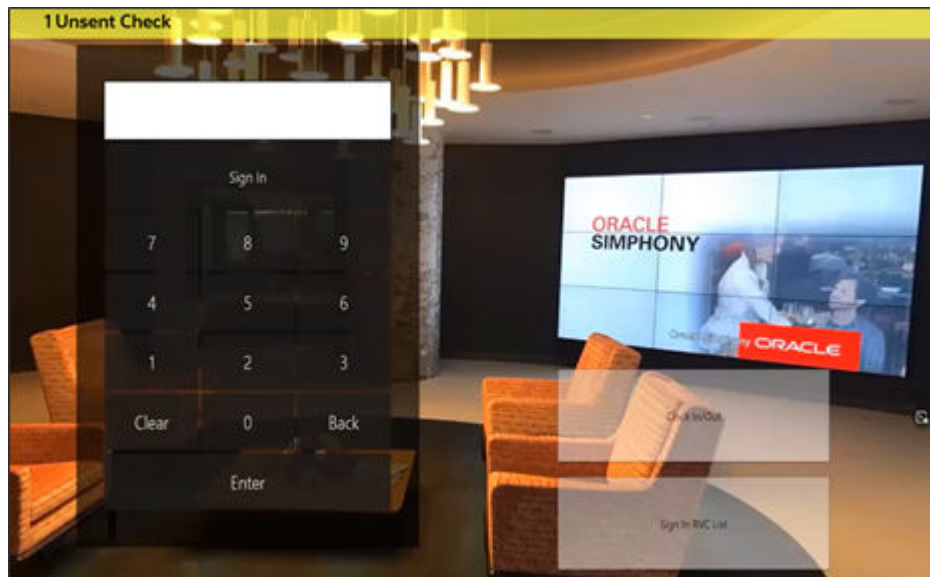


Figure 1-7 Unsent Check Warning on Workstation and Tablet Start Check



Figure 1-8 Unsent Check Warning on Mobile Phones and Handheld Sign In Page

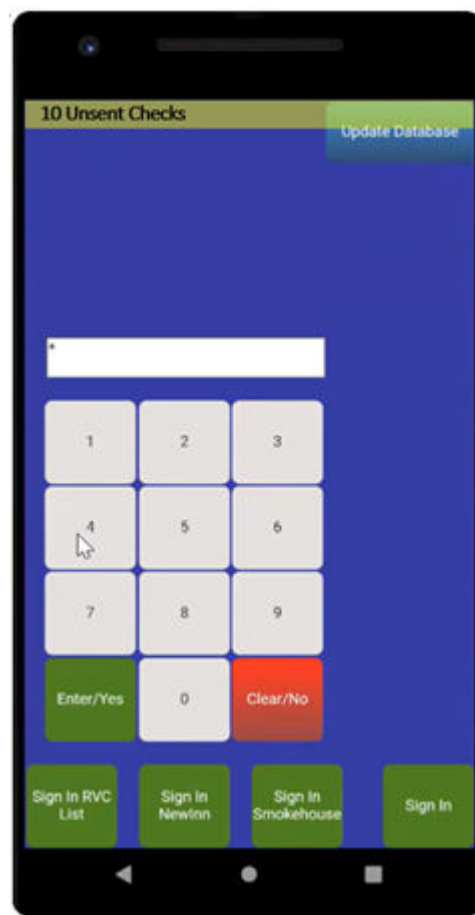
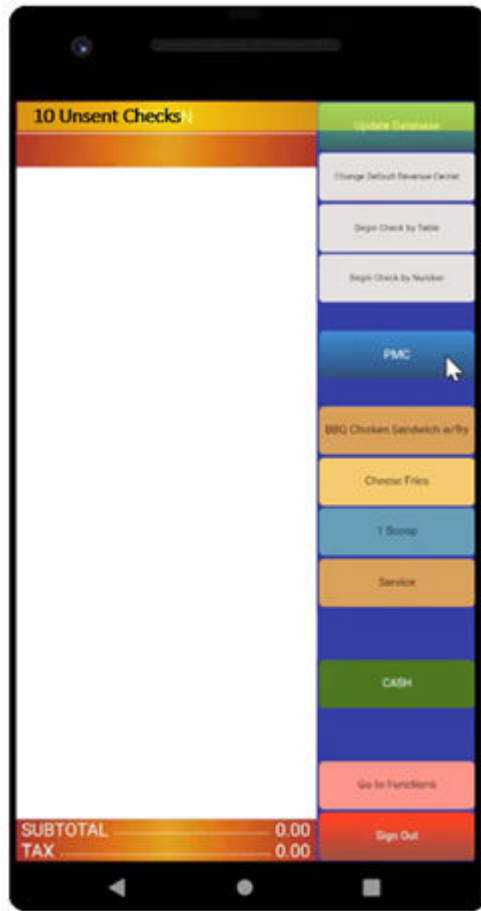


Figure 1-9 Unsent Check Warning on Mobile Phones and Handheld Start Check



Updating Workstations After Configuration Changes

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

Table 1-4 Workstation Database Actions

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

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

1. To reload the workstation database, click the **Reload Workstation Database** function key.
2. To set the workstation to start a job in the background to download the configuration changes, click the **Refresh Database** function key.
3. To set the workstation to start a job in the foreground to download the configuration changes, click the **Refresh Database Live** function key. When you are running a database refresh in the foreground, you cannot perform other tasks on the workstation until the update completes.
4. To redraw all pages with any newly added content, click the **Redraw Page Content** function key.

Reloading and Refreshing the Check and Posting (CAPS) Database

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

Table 1-5 CAPS Database Actions

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

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

2

Start of Shift

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

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

Signing On and Off of a Workstation

1. To sign on to a workstation, enter the **Employee ID Number** or swipe the employee magnetic card in the reader attached to the workstation.
2. If the workstation has multiple revenue centers, select the revenue center, and then touch **OK**.
3. Touch **Sign In**.
4. To manually sign out of a workstation, click **Sign Out**.
5. Stay Down Operators can sign out using the **Cancel Transaction** function key when not in a transaction.
6. The workstation automatically signs out Pop Up Operators after performing a service total or paying a check, and clicking the **Cancel Transaction** function key to end a transaction.

Clocking In and Out

When a workstation is offline but can communicate with other workstations and services, employees can clock in. When a workstation is offline (no network communication) and is unable to communicate with other workstations and services, employees cannot clock in.

If your organization uses Labor Management and Symphony is configured to automatically clock out and clock in when changing revenue centers, the system prompts you to do so.

Employees can be notified about time card adjustments to provide greater transparency about changes which impact paychecks. When a time card has been adjusted, the employee is notified automatically during clock-in or clock-out, or on demand when clicking **Time Card Adjustment Notification**.

1. To clock in, click the **Clock In** button.
2. If the manager or payroll team changed the following information on your time card, the Time Card Changes dialog appears.
 - Clock In Date
 - Clock In Time
 - Clock Out Time
 - Direct Tips
 - Indirect Tips

- Job Code

If more than one adjustment is made to a time card, only the original and current changes appear in the Time Card Changes dialog. After acknowledging the current notification (the following figure shows 1 of 2), the next time card adjustment appears (2 of 2), and so on until all time card changes have been acknowledged.

Acknowledge the time card change by clicking **Agree** or **Disagree**.

Figure 2-1 Time Card Changes Dialog

Time card changes

Original Shift

Clock In Date	Clock In Time	Clock Out Time
Thursday, 11/23/2023	6:09 PM	8:10 PM

Do you agree with these changes?

Field	Old Value	New Value
Clock In Time	6:09 PM	7:10 PM
Clock Out Time	8:10 PM	9:30 PM
Direct Tips	0.35	10.35
Indirect Tips	10.00	3.25
Job Code	SERVER	BarTender

1 of 2

Disagree Agree

3. To check for time card adjustments on demand during your shift (after clock in and sign in but before clock out), click the **Time Card Adjustment Notification** button (if configured). If the time card has not been adjusted, the following message appears.

Figure 2-2 On Demand With No Time Card Adjustments

MANAGER KOVAI 11/23/2023 4:55:57 PM CDR_AUG_26 All Day

OPEN CHECKS FOOD LIQUOR NA BEVERAGES RETAIL FUNCTIONS PAYMENT TAB

TakeAway

Error

There are no time card adjustments to show

OK

4. Close all guest checks before clocking out at the end of a shift unless you have the privilege to clock out with open checks.
5. To clock out, click the **Clock Out** button.
6. If a manager or payroll team changed specific information on your time card (listed in Step 2), the Time Card Changes dialog appears. Acknowledge the time card change by clicking **Agree** or **Disagree**.

Incrementing a Shift

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

- An employee works a double shift and the employee must make a deposit at the end of each shift. For example, an employee can work the breakfast shift and make a deposit of all cash due. Then, the employee can increment the shift so the lunch shift starts at 0.00. At the end of the lunch shift, the employee knows how much money to deposit without having to subtract the breakfast totals.
- A shift spans a business day. For example, if an employee's shift is from 1:00 a.m. to 9:00 a.m., and Start of Day runs at 3:00 a.m., you can configure Symphony so the employee's report shows all activity from 1:00 a.m. to 9:00 a.m. In this situation, the employee's report does not reset at 3:00 a.m.

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

1. To increment a shift, select one of the following function keys:
 - **863 - Increment Employee Shift for Signed-In Operator:** Select this key to increment the shift for the signed-in workstation operator.
 - **864 - Increment Employee Shift, Prompt:** Select this key to have the workstation show a list of employees. You can then select an employee and click the **Increment Shift** link.
 - **865 - Increment Cashier Shift for Signed-In Operator:** Select this key to have the workstation increment the shift for the cashier associated with the signed-in workstation operator or the cashier associated with the workstation.
 - **866 - Increment Cashier Shift, Prompt:** Select this key to have the workstation show a list of cashiers. You can then select a cashier and click the **Increment Shift** link.
2. To increment a shift for the employee signed in to the workstation using the PMC Procedure, click **Increment Current Employee Shift**.

Using Tip Track

Servers can use Tip Track to:

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

You cannot use Tip Track with Labor Management Cloud Service.

1. Click the **Tip Track Tip Out** function key.
2. Enter the tip out amount, and then click **OK**.

3. From the Select Employee dialog, select the employee to tip-out, and then click **OK**.
Employees shown in the Select Employee dialog have the **Claim Tips From Other Employee** privilege.
4. To share the tip with another employee, click **Yes** at the prompt, and then repeat Steps 2 through 4.
5. To edit tip-outs given by the signed-on employee:
 - a. Click the **Tip Track Edit My Tips** function key.
 - b. From the Select The Tip To Adjust dialog, select a tip transaction.
To revise the tip amount, click **Edit Tip Amount**, enter the new tip amount, and then click **OK**.
To change the receiving employee, click **Edit Employee**, select a new receiving employee from the list, click **OK**, and then click **Yes**.
 - c. Click **Done**.
6. To edit the tip-outs given by other employees:
 - a. Click the **Tip Track Edit** function key.
 - b. In the Select Employee dialog, select the employee that shared the tip.
 - c. In the Select The Tip To Adjust dialog, select a tip transaction.
To revise the tip amount, click **Edit Tip Amount**, enter the new tip amount, and then click **OK**.
To change the receiving employee, click **Edit Employee**, select a new receiving employee from the list, click **OK**, and then click **Yes**.
 - d. Click **Done**.

Running Shift Reports

You must have the appropriate privileges to run shift reports.

1. Open the Reports List from the workstation.
2. Select one of the following reports or enter the Report Number, and then click **OK**.
 - **Employee Financial Report**
 - **Employee Financial - VAT Report**
 - **Employee Tip Report**
 - **Cashier Financial Report**
 - **Offline Employee Financial Report**
 - **Offline Employee Cashier Report**
3. (Optional) Change the revenue center in the **View** field.
4. Select the **Employee**, and then select the **Period**.
5. If you selected **Custom** for the **Period**, select the **Custom Start** and the **Custom End** dates.
6. Select the **Shift**. The following table describes the shift filtering options.

Table 2-1 Shift Filtering Options

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

7. If you selected **Custom** for the **Shift**, select a **Shift Number**.
8. (Optional) Select the **Workstation**, and then select the **Cash Drawer**.
9. Click **Run Report**.
If you do not have privileges to run the report, a message appears and the application returns to the Reports list.
10. (Optional) To print the report on the receipt printer, click the **Print** button.
11. Click **Close** to close the Reports dialog.

3

Guest Checks

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

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

Beginning and Closing a Check

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

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

Table 3-1 Begin Check Function Keys

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

2. To close the check, select the function key to pay.
3. Tender the check using the guest's payment method.

Beginning a Fast Transaction

A fast transaction lets you start a transaction without having to select a Begin Check function key. Fast Transactions are often used in retail or concession environments where a workstation

operator stands in one place and quickly adds transactions repeatedly without assigning guests to table or check numbers.

If the property is using the Symphony Payment Interface (SPI) to process standard credit card transactions and quick chip is enabled, the guest can swipe or dip the credit card at the beginning of a fast transaction while you enter menu items.

1. Sign on to the workstation.
2. Click any menu item key.

If quick chip is enabled, the PIN Entry Device (PED) lights up on the start of the transaction. If a card was dipped or swiped during the fast transaction, the card details can then be used to pay for the transaction.
3. In case of partial payment, the swiped/dipped card's information is used for the first card payment that is initiated at the workstation. Any subsequent card payments cause the PED to prompt the guest to swipe or dip a card. If the guest pays with a different payment method or presses the Cancel button on the PED at any time after swiping or dipping the card, the card details are removed and the transaction is treated as a regular, non-quick-chip transaction. The PED lights up when the credit card payment is invoked at the workstation.

Adding the Guest Count to a Check

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

- Begin a check
 - Use the **Number of Guests** function key during a transaction
 - Pick up a check and perform a service charge
 - Add a menu item (for example, a particular beverage) to the check
1. To add the guest count when beginning a check:
 - a. Sign on to the workstation.
 - b. Click a **Begin Check** function key.
 - c. Enter the number of guests at the workstation prompt.
 2. To change the count on an open check during a transaction:
 - a. Click the **Number of Guests** function key.
 - b. Enter the number of guests at the workstation prompt.

Adding the Guest Room Number to a Check

After beginning a check, you can validate a guest's room number and last name. This does not pre-authorize nor charge payment; it is simply a query through the OPERA Payment Driver to associate the guest's room number and name on the check. During payment of the check, you can process the room charge without re-entering the guest's room number and name.

1. Begin a check.
2. Add at least one menu item.
3. Click the **Assign Opera Account** button.

4. Enter the guest's **Room number** and **Last name**, and then click **OK**.

The application queries the OPERA property management system to confirm the room number and name. If the confirmation is successful, a Verified dialog appears, and the guest's name appears in the check detail. If an invalid room number or name was entered, an error message appears.

5. (Optional) To change the room number or last name, repeat steps 3 and 4.
6. To tender the check, see [Using OPERA Self Pay to Close a Check](#) for instructions.

Changing the Order Type

An order type is a sales category based on where the order is consumed, such as Dine In or Take Out. Order types control active tax rates for a transaction, allocating a tax based on where the order is consumed. A default order type is assigned to checks, but can be changed if buttons have been configured on the POS to change the order type.

Use the order type buttons to change the order type. The order type appears in the check header.

Changing the Order Channel

An order channel is where an order is placed. For example, guests can place an order at a kiosk, a drive thru window, inside a restaurant, or via a delivery aggregator. A default channel is assigned to checks, but can be changed if buttons have been configured on the POS to change the order channel.

Use the order channel buttons to change the order channel. If configured, the order channel appears in the check header.

Open Check SLU Sorting Options

After beginning a check, the primary sort order for the check SLU depends on the pre-defined sort order configured in the EMC.

- **Check Open Time:** Open checks appear in the order in which they are created (opened) in the check SLU, with the earliest time shown first. This is the default sort order.
- **Table Name:** Open checks started with a table name or number appear in alphanumeric order in the check SLU. Checks without table names or numbers appear first before table name/number checks.
- **Service Total Time:** Open checks appear 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 in the EMC and no table name/number is used, the secondary sort order is determined by the check SLU sort order configuration.

Sort Order Exceptions:

The following scenarios do not follow the check SLU sort order:

- 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.

Order Handling on Open Checks

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

- Send orders while remaining on the guest check without having to pick up the check again or sign in to the workstation
- Take orders for an entire service round, but hold the items and send them in groups over a period of time
- Set the workstation to automatically send items or an entire order at a preset time
- Choose to send items on hold to order devices or keep them on hold when ending the current service round
- Manually fire menu items within the current round to order devices
- Void a previous round fired item
- Cancel a transaction and have only the non-fired items cancelled, while previously fired items in the current service round remain on the check

Firing Menu Items on a Check

The Fire Now feature cannot be used with Dynamic Order Mode (DOM).

1. Begin a check and add menu items.
2. Click the **Fire Now** function key. The Fire Now dialog appears, listing menu items that do not have a status indicator (for example, Held or Timed Fire).
3. Select one or more menu items from the Fire Now dialog.

To filter menu items based on seat, course, Major Group or Family Group (limiting the menu items shown in the dialog), click one of the following buttons:

- **Fire By Seat**
- **Fire By Course**
- **Fire By Major Group**
- **Fire By Family Group**

4. Click the **Fire** button to fire the selected menu items to the order device.

Fired menu items are treated as previous round menu items. The previous round indicator (asterisk *) appears adjacent to fired items in the check detail area. Non-fired items are current round menu items.

5. To cancel a transaction containing fired items prior to performing a Service Total, click the **Transaction Cancel** function key, and then click **Yes** to confirm.

Items that were fired remain on the check with a previous round indicator. Non-fired menu items are discarded from the check.

6. To void a transaction containing previous round fired items:
 - a. Select one or more fired menu items in the check detail area, and then click the **Void** function key.
 - b. If prompted, select a void reason, and then click **OK**. Items are voided from the check detail area.
 - c. To fire voided items to the order device, perform one of the following operations by clicking the function key:
 - **Fire Now**: When pressed, the Fire Now dialog appears with the voided menu items marked with an asterisk (*). You must select the voided menu items and then click **Fire** to send the items to the order devices.
 - **Send and Stay**
 - **Service Total**

The voided items are sent to the order device and are indicated by a void icon adjacent to the items in the order device.

Sending Items to Order Devices While Remaining on the Check

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

Sent menu items are treated as previous round menu items. The check preview on the open check screen lookup (SLU) shows yellow for other workstations in the revenue center.
3. If your system has workstation alerting enabled and menu items fail to send to the order device/KDS or kitchen printer, the **Alerts** function key flashes in one or more status bars. To handle the alert notification and ensure that the kitchen staff is aware of items which need to be prepared:
 - a. Click one of the following function keys:
 - **Alerts**
 - **Show Checks With Failed Prints To KDS/Order Device**

The Checks Failed to Print on Order Device dialog appears listing all checks (for the currently signed in employee) with items that failed to send to an order device. This dialog also lists the order devices which did not confirm receiving the print job.
 - b. Select a check in the list, and then click the **View** button.
 - c. On the Check – Items Failed To Print On Order Devices dialog, note the items and order devices, and then notify the kitchen staff of the menu items that did not reach the kitchen for preparation.

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

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

If the KDS Controller or Print Controller is turned off, restart it.
 - d. After remedying the situation, click the **Acknowledge** button. The check item is removed from the list.

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

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

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

4. Add more menu items to the check.
5. Repeat Steps 2 through 4 until you complete the order for the current round.
6. End the current service round by sending the remaining items to the order devices.

Re-firing Items to the Order Device

If you have the appropriate privilege, you can use the Re-fire command to re-send items to the order device.

You cannot re-fire items from the following types of checks:

- Closed Checks
- Training Checks
- Waste Checks
- Autofire Checks

The re-fire function is not supported with Dynamic Order Mode (DOM). Menu items configured with Timed Fire cannot be re-fired using the re-fire functionality.

Re-firing items is not allowed when there is activity in the current round.

1. Pick up the check that has been Service Totaled and contains the items.
2. Select one or more items to re-send to the order device, click the **Re-fire** button, and then click **OK**.

After the items are sent to the kitchen, the transaction is automatically canceled to avoid further activity that round. Printed orders include a Re-fire header line. KDS orders show a Re-fire indicator.

Holding Menu Items on a Check

There are various ways to hold menu items and to end the current service round.

1. To hold the entire order and begin a new guest check:
 - a. Add menu items.
 - b. Click the **Hold Order** Tender/Media type function key. The workstation shows the letter H next to all held items.
2. To hold a single menu item:
 - a. Select an item.
 - b. Click the **Hold** function key. The workstation shows the letter H next to the held item.
3. To hold menu items as you add items to the check:
 - a. Click the **Transaction Hold** function key.
 - b. Add menu items. The workstation shows the letter H next to all items on hold.
4. To release held menu items from their hold status:

- a. Select menu items on hold.
- b. Click the **Hold** function key. The letter H (next to the menu items) disappears.
- 5. To pick up checks that have menu items on hold:
 - a. Click **Pick Up Check By List**.
 - b. Select **Held Items Only** from the **View Type** drop-down list. The workstation shows checks with held items only and the letter H next to all checks.

Holding Selected Items or an Entire Order for a Preset Time

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

1. To hold selected menu items or an entire order for a preset time:
 - a. Add menu items, and then click **Timed Fire Menu Item**.
 - b. Select one or more menu items to hold from the Timed Fire dialog, and then select the fire time by pressing the plus sign (+) and minus sign (–).
 - c. To set the fire time for seats or courses, press **Fire by Seat** or **Fire by Course** to filter the items, select the seats or courses for which to set the time, and then configure the fire time.
 - d. To hold an item without a specified time, select the item, click **Hold** in the Timed Fire dialog, and then click **OK**.

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

2. To modify configured times:
 - a. Pick up the check where menu items are held for a preset time (timed fire checks), and then click **Timed Fire**.

If you click **Pick Up Check By List**, you can filter checks with items on hold by selecting **Held Items Only** from the **View Type** drop-down list.
 - b. Select one or more menu items, change the fire time, and then click **OK**.
 - c. Perform a service total.

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

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

3. To view the date and time each item was ordered and sent to the order devices:
 - a. Pick up a check.

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

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

1 Walkabout Bowl 4.29

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

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

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

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

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

--Chicken Bowl 00:15

Ending the Current Round and Closing Checks with Items on Hold

There are various ways to end the current round and to close checks with held items.

1. To send all items (including held menu items) but not items held for a preset time, click the **Fire Order** Tender/Media type. The workstation shows an asterisk (*) next to all sent items.
2. To send all items except for the ones on hold, click the **Keep Held Status** Tender/Media type. The workstation shows the letter H next to the held items and an asterisk (*) next to the sent items.
3. To make a payment and close a check with held menu items, click a touchscreen button assigned to a payment method (for example, Cash or Credit Card). The workstation shows a dialog box inquiring what action to take depending on the environment configuration.
 - a. Click **Send Now** to send all items on hold to the order devices.
 - b. Click **Do Not Send** to close the check without sending the items on hold to the order devices.

Indicators on the Employee Check Journal Report

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

Table 3-2 Check Journal Reports Indicator for Held Menu Items

If Items Are...	Check Journal Shows...
On hold	The letter H next to the items on hold
On hold for a preset time	The configured time in the 24-hour format next to each menu item
Sent to the kitchen	Three asterisks (***) in front of the previously held menu items
Released from their hold status and sent	A pound sign (#) in front of the menu items

Creating and Picking Up Suites Checks

1. Press the **Pickup Suites Check** function key, enter the suite number, and then press **OK**.
2. To create a new Suites check:
 - a. Select a suites owner that does not have a check number from the list, and then press **OK**.
 - b. If the suite owner's name is not in the list, select **0 - ADD GUEST**, press **OK**, enter the suite guest name, and then press **OK**.

- c. Add menu items to the Suites check, and then end the current service round.
3. To pick up an existing Suites check:
 - a. Select a suites owner with a check number from the list (for example, John Smith CHK #435), and then press **OK**.
 - b. If the suites owner has multiple Suites checks, enter the check number that you want to pick up, and then press **OK**.
 - c. Make the necessary changes to the Suites check, and then end the current service round.

Adding Suites Owner Information to a Check

1. Press the **Add Check to Suite** function key, enter the suite number, and then press **OK**.
2. Enter the suite guest name, and then press **OK**.
3. Enter the number of the check to add guest information, and then press **OK**.
4. Select the suite guest name that you entered in Step 2 from the suites owner list, and then press **OK**.
5. Make the necessary changes, and then end the current service round of the Suites check.

Combining Checks in the Same Revenue Center into One Order

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

1. To view a list of all open checks in the revenue center before combining:
 - a. Pick up a check to combine with another.
 - b. Press the **Add/Transfer Check SLU** function key.
 - c. Select the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.
2. To combine checks using the check number:
 - a. Pick up a check to combine with another.
 - b. Press the **Add/Transfer Check by Number** function key.
 - c. Enter the number of the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.
 - d. (Optional) Add more menu items to the check.
 - e. End the current service round.
3. To combine checks using the table number:
 - a. Pick up a check to combine with another.
 - b. Press the **Add/Transfer Check by Table** function key.
 - c. Enter the table number on the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.
 - d. (Optional) Add more menu items to the check.
 - e. End the current service round.

Combining Checks Across Revenue Centers into One Order

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

1. To view a list of all open checks in the revenue center before combining:
 - a. Pick up a check to combine with another.
 - b. Press the **Add/Transfer from List Prompt RVC** function key, select the revenue center that has the check you want to combine, and then press **OK**.
 - c. If the workstation has separate touchscreen buttons configured for each revenue center for viewing a list of all open checks, press the touchscreen button configured for combining checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by List RVC 1** function key.
 - d. Select the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.
2. To combine checks using the check number:
 - a. Pick up a check to combine with another.
 - b. Press the **Add/Transfer Check by Number Prompt RVC** function key, select the revenue center that has the check you want to combine, and then press **OK**.
 - c. If the workstation has separate touchscreen buttons configured for each revenue center for combining checks, press the touchscreen button configured for combining checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Number RVC 1** function key.
 - d. Enter the number of the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.
 - e. (Optional) Add more menu items to the check.
 - f. End the current service round.
3. To combine checks using the table number:
 - a. Pick up a check to combine with another.
 - b. Press the **Add/Transfer Check by Table Prompt RVC** function key, select the revenue center that has the check you want to combine, and then press **OK**.
 - c. If the workstation has separate touchscreen buttons configured for each revenue center for combining checks, press the touchscreen button configured for combining checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Table RVC 1** function key.
 - d. Enter the table number that is on the check that you want to combine with the check that is currently open on the check detail area, and then press **OK**.
 - e. (Optional) Add more menu items to the check.
 - f. End the current service round.

Check Transfers

Transferring a check allows a workstation operator to take ownership of a check from another workstation operator or another revenue center. For example, a couple arrives at a restaurant to find that there are no tables available, so they go to the bar for drinks. The bartender starts

the check. When a table opens, the check is transferred from the bartender to a server in the dining room, so the customer only has to pay one check at the end of the visit.

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

Table 3-3 Examples of Check Transfers between Revenue Centers

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

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

Transferring a Check Within a Revenue Center

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

If the revenue center uses events, you can transfer open checks from one server to another within the same event or event area. You cannot transfer open checks across different events or areas. When transferring checks, both checks must have the same order type or order channel assigned.

1. To view a list of all open checks in the revenue center before transferring:
 - a. Press the **Add/Transfer Check SLU** function key.
 - b. Select a check from the list, and then press **OK**.
2. To transfer all checks belonging to another workstation operator simultaneously:
 - a. Press the **Auto Block Check Transfer** function key.
 - b. Select an employee or enter the ID of the employee whose checks you want to transfer, and then press **OK** twice to confirm.
3. To transfer a check using the check number:
 - a. Press the **Add/Transfer Check by Number** function key.
 - b. Enter the check number, and then press **OK** twice to confirm.
4. To transfer a check using the table number:
 - a. Press the **Add/Transfer Check by Table** function key.
 - b. Enter the table number, and then press **OK** twice to confirm.

Transferring a Check to Another Revenue Center

There are two ways you can transfer a check to another revenue center: by check number and by table number. When transferring checks, both checks must have the same order type or order channel assigned.

1. To view a list of all open checks in the revenue center before transferring:
 - a. Press the **Add/Transfer from List Prompt RVC** function key, select the revenue center that has the check you want to transfer, and then press **OK**.
 - b. If the workstation has separate touchscreen buttons configured for each revenue center for viewing a list of all transferable checks, press the touchscreen button configured for transferring checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by List RVC 1** function key.
 - c. Select the check that you want to transfer from the list, and then press **OK**.
2. To transfer a check using the check number:
 - a. Press the **Add/Transfer Check by Number Prompt RVC** function key, select the revenue center that has the check you want to transfer, and then press **OK**.
 - b. If the workstation has separate touchscreen buttons configured for each revenue center for transferring checks, press the touchscreen button configured for transferring checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Number RVC 1** function key.
 - c. Enter the check number, and then press **OK** twice to confirm.
3. To transfer a check using the table number:
 - a. Press the **Add/Transfer Check by Table Prompt RVC** function key, select the revenue center that has the check you want to transfer, and then press **OK**.
 - b. If the workstation has separate touchscreen buttons configured for each revenue center for transferring checks, press the touchscreen button configured for transferring checks from the revenue center that has the check. For example, if the check is in revenue center 1, press the **Add/Transfer Check by Table RVC 1** function key.
 - c. Enter the table number, and then press **OK** twice to confirm.

Suspend and Resume Checks

With Suspend/Resume you can:

- Suspend a check started by another employee, and sign on to the workstation.
- Suspend a check when the workstation automatically signs out an employee.
- Suspend a check using the Suspend Order Tender/Media key.

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

Suspending and Resuming a Check

To suspend a check, the workstation screen should be free from prompts and error messages. When you suspend a check, the workstation posts the check to the database but does not print it. Suspended checks are not shown in the Open Check SLU (Screen Look Up).

1. To suspend a check, perform one of the following actions:
 - Sign on to the workstation while another employee's check is open.
 - Click the **Suspend Order** tender key.You can suspend only one check at a time.
2. To resume a check, sign on to the workstation. You can resume a check only from the workstation that suspended the check.

Team Service and Team Checks

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

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

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

Transaction Handling with Team Checks

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

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

Transaction Handling When Offline

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

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

Team Service and Check Adjustment

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

modified in an adjust closed check of a team check, when the adjustment is complete, Symphony updates the charge tip totals on the Employee Tip Reports of the team members.

Team Check and Guest Check Combination

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

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

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

Creating a Service Team

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

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

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

4. Press **Save**.

Adding Employees to an Existing Service Team

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

1. Press the **Create Team Members or Add Team to Check** function key.
2. In the Team Service dialog, select the team to modify, and then press **Edit**.
3. From the Select Employee section of the dialog, select the new employees to add to the team, and then press **Add**.
4. Click **Save**.

Removing an Employee from a Service Team

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

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

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

2. In the Team Service dialog, select the team to modify, and then press **Edit**.
3. From the bottom left section of the dialog, select the employees to remove from the team, and then press **Remove**.
4. Press **Save**.

Printing Team Member Names

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

1. Press the **Create Team Members or Add Team to Check** function key.
2. In the Team Service dialog, select the team to print.
3. To print the names of employees in all teams, select **Select All**.
4. Press **Print**.

Deleting a Service Team

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

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

Creating a Team Check

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

Adding a Service Team to an Open Check

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

1. Pick up the appropriate check, and then press the **Create Team Members or Add Team to Check** function key.
2. Select the service team to add to the check, and then press **Select**.
3. To create a new service team, press **Add**.

Removing a Service Team From an Open Team Check

You need to have the appropriate privileges to perform this task. To remove a service team from a check:

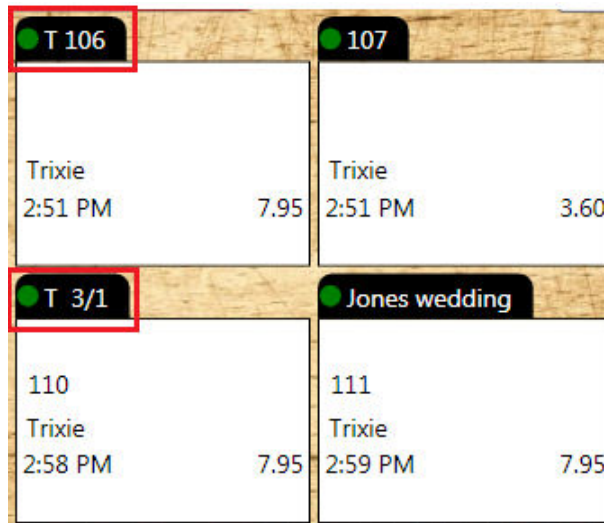
1. Pick up the appropriate team check.

2. Press **Remove Team From Open Check**, and then press **OK** to confirm.

Team Check Identification

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

Figure 3-1 Teams Checks on the Pick Up Check SLU



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

Figure 3-2 Team Checks on the Pick Up Check by List Dialog

Pick Up Check					
Check	Time	Amount	Employee	Table	
106	2/12/2014 2:51:14 PM	7.95	Trixie	T	
107	2/12/2014 2:51:38 PM	3.60	Trixie		
108	2/12/2014 2:52:07 PM	14.90	Trixie		

Team Check Transfers

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

If a team check is transferred to an employee who is not a member of the team, the original check operator is removed from the team and replaced with the new check operator. When this occurs, the name of the team changes to the date and time the check transfer took place.

See [Check Transfers](#) for more information.

Follow Me Checks

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

Table 3-4 Sample Workflow When Employees Share a Workstation

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

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

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

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

Setting and Changing the Default Printer

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

1. To set your default printer for the current workstation:
 - a. Click a tender media function key or click the **Print** button (if configured).
 - b. On the Printer Assignment Needed dialog, select the printer to use for the print job, and then click one of the following buttons
 - **Print and default:** Select this option to print this time, and to set this printer as the default printer for the printer type. (You do not have to select a printer on the next print job.)
 - **Print:** Select this option to print one time. (You are prompted to select a printer again on the next print job.)

If you previously selected a default printer for the printer type, the default printer is used for the print job, and you will not see the Printer Assignment Needed dialog.
2. To change your default printer selection for the current workstation:
 - a. Click the **Change Default Printer Destination** button.
 - b. On the Assign Default Destination Printers dialog, select one or more printer types, and then click the **Assign Printer** button.
 - c. On the Select a Printer dialog, select the printer, and then click **OK**.

Printing Guest Receipts in Multiple Languages

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

1. Sign on to the workstation.
2. Add menu items.
3. Click the **Print Language List** button.
4. Select the language in the Change Print Language dialog box.
5. Print the customer receipt.
6. If the Print Language 2 button is configured, click **Print Language 2**.

Emailing Customer Receipts to Guests

1. Sign on to the workstation
2. Start an order and add menu items.
3. Tap the appropriate button to process payment for the order.
4. On the receipt prompt, tap **Email Receipt**.
5. Ask the guest to enter their email address on the CFD and then tap **Send Receipt**.
6. If the customer leaves without entering an email address, tap **Cancel Email Receipt**.

Seat Filtering and Memo Checks

You can filter a check by one or more seat numbers, apply a tender only for the detail and summary totals associated with the seat, and if required, create a check for the filtered seats. This enables you 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. You begin 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. You 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.

You 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 3-3 Sample Check Filtered by Seats

CHK 112 Dine In	
Walter	
2/14/2017 12:05 PM	
Displaying Seats: 1,2,3	
1 Hamburger	8.00
1 Wings	10.00
1 Crab Cakes	20.00
Subtotal	
Tax	
Payment Due : 38.00	

Figure 3-4 Sample Printed Memo Check

```

Guest Check Header

1 walter
-----
                CHK  112
            2/14/2017 12:05 PM
***** MEMO CHECK *****
*****
*****
                Seat 1,2,3
*****
1 Hamburger                      8.00
1 wings                          10.00
1 Crab Cakes                     20.00
                                   $38.00

1 2 : 0 8   P M
      T O T A L   D U E       $ 3 8 . 0 0

```

If you print a memo check before applying a tender to the filtered seats, the memo check prints with the check number of the primary check. If you print 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

You 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, Symphony recalculates the discount when the check is filtered by seats. That is, Symphony 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 that you add are added to the lowest seat number.
- You 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
- Symphony supports assigning up to 99 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

Filtering a Check by Seat Number

1. Pick up a check that has menu items from multiple seats.
2. To filter a single seat, use one of the following methods:
 - a. Press **Add Seat to Filter**, enter the seat number, and then press **OK**.
 - b. Press the seat number using the on-screen numeric key pad, and then press **Add Seat to Filter**.
3. To filter multiple seats:
 - a. Press **Manage Seat Filter**.
 - b. From the Seat Filter window, select the seats in the Available Seats pane.
Check details pertaining to the seats that you selected appear in the Selected Seat Check Detail pane.
 - c. Press **Save**
4. To clear the seat filter, press **Clear Seat Filter**.

Removing a Seat from the Filter

When a check is filtered by one or more seats, you can remove a seat from the filtered list at any time. To remove a seat from the filter:

1. Press the **Remove From Seat Filter** function key.
2. Enter the seat number to remove, and then press **OK**.

Changing the Seat Number of Menu Items on a Check

When a check is filtered by seats, Symphony only allows you to assign menu items to a seat number that is in the filtered list. For example, if a check is filtered by seat 1, seat 2, and seat 3 and you want to change the seat number of items belonging to seat 3, you can only change it to either seat 1 or seat 2.

1. Select the menu items that belong to the seat you want to modify, and then press **Edit Seat**.
2. Enter the new seat number, and then press **OK**.

Printing a Memo Check

1. Pick up a check that has menu items from multiple seats.
2. Filter the check by the seat numbers for which you want to print the memo check.
See [Filtering a Check by Seat Number](#) for instructions.
3. (Optional) Tender the check using the guest's payment method.
4. Press the **Print Memo Check** function key.

Reopening a Closed Check

After a check has been closed, you can reopen it within 7 days for use as a regular guest check. All menu items from the check are considered previous-round items. After reopening a closed check, you can void the following:

- Menu Items
- Discounts
- Service Charges

You need to have the appropriate privileges to perform the reopening closed check and void operations.

1. To reopen a closed check when you know the check number:
 - a. Press the **Reopen Closed Check** function key.
 - b. Enter the check number, and then press **OK**.
 - c. Confirm the date and check total, and then press **OK**. The check is reopened.
2. To reopen a closed check by selecting the check from a list of closed checks:
 - a. Press the **Reopen Closed Check from List** function key.
 - b. Select the check from the list, and then press **OK**.
 - c. Confirm the date and check total, and then press **OK**. The check is reopened.

Adjusting a Closed Check

After a check has been closed, you can adjust it within 7 days. When you adjust a closed check, the check remains closed (you do not reopen it) and you cannot change menu items. You can only adjust the gratuity, payments (for example, voiding a tip or payment), or guest count. You need to have the appropriate privileges to perform this operation.

1. To adjust a closed check when you know the check number:
 - a. Press the **Adjust Closed Check** function key.
 - b. Enter the check number, and then press **OK**.
 - c. Confirm the date and check total, and then press **OK**.
 - d. Change the gratuity, payment, or guest count.

2. To adjust a closed check by selecting the check from a list of closed checks:
 - a. Press the **Adjust Closed Check from List** function key.
 - b. Select the check from the list, and then press **OK**.
 - c. Confirm the date and check total, and then press **OK**.
 - d. Change the gratuity, payment, or guest count.

Adjusting a Credit Card Payment

After reopening a closed check within 7 days, you can perform an adjustment to a credit card payment.

You need to have the appropriate privilege (Role permission **278 - Authorize/Perform Credit Card Refund Transaction**) to perform the reopening closed check and adjustment operations.

1. To adjust a credit card payment when you know the check number:
 - a. Press the **CCard Adjustment** function key.
 - b. In the dialog window, press **Number**.
 - c. Enter the check number, and then press **OK**.
 - d. Confirm the date and check total, and then press **OK**. The check is reopened.
 - e. (Optional) If there are multiple credit cards on the check, select the desired credit card, and then press **OK**.
 - f. Enter the amount to refund, and then press **OK**.
2. To adjust a credit card by selecting the check closed date:
 - a. Press the **CCard Adjustment** function key.
 - b. In the dialog window, press **Date**.
 - c. Enter the check closed date, and then press **OK**.
 - d. Select the desired check, and then press **OK**. The check is reopened.
 - e. (Optional) If there are multiple credit cards on the check, select the desired credit card tender, and then press **OK**.
 - f. Enter the amount to refund, and then press **OK**.

Voiding a Closed Check

After a check has been closed, you can void the check within 7 days. Voiding a closed transaction voids the entire check and all menu items on it. You need to have the appropriate privileges to void a closed check.

1. To void a closed check when you know the check number:
 - a. Press the **Void Closed Check** function key.
 - b. Enter the check number, and then press **OK**.
 - c. Confirm the check details, select a void reason, and then press **OK**. Depending on configuration, the check number is voided and becomes the next check number in sequence. You can void a payment or void a menu item, and close the check again.
 - d. If at least one voided tender is configured to open the cash drawer, the cash drawer opens once (for example, voiding a check that was closed to cash causes the drawer to open so you can return cash to the customer).

2. To void a closed check by selecting the check from a list of closed checks:
 - a. Press the **Void Closed Check from List** function key.
 - b. Select the check from the list, and then press **OK**.
 - c. Confirm the check details, select a void reason, and then press **OK**. Depending on configuration, the check number is voided and becomes the next check number in sequence. You can void a payment or void a menu item, and close the check again.
 - d. If at least one voided tender is configured to open the cash drawer, the cash drawer opens once (for example, voiding a check that was closed to cash causes the drawer to open so you can return cash to the customer).

Reprinting a Closed Check

You can reprint the check for a closed transaction in the current or previous business dates, and you can reprint a receipt for the last closed check. You need to have the appropriate privileges to perform these operations.

1. To reprint the check for a closed transaction:
 - a. Press the **Reprint Closed Check** function key.
 - b. Select the check to print, and then press **OK**.
2. To reprint a receipt for the last closed check, press the **Reprint Previous Closed Check** function key. The receipt prints.

Reprinting a Credit Card Voucher

You can reprint the credit card voucher for a closed transaction in the current or previous business dates, and you can reprint a credit card voucher for the last transaction on the current workstation. You need to have the appropriate privileges to perform these operations.

1. To reprint the credit card voucher for a closed transaction:
 - a. Reopen the closed transaction.
 - b. Press the **Reprint CC Voucher** function key.
2. To reprint the credit card voucher for the last transaction on the current workstation:
 - a. Press the **Reprint Previous Credit Card Voucher** function key.
 - b. (Optional) If there are multiple credit card charges present on the last transaction, select the desired credit card.
 - c. A single copy of the credit card voucher prints.

Applying a Menu Item Tax Class Override

The Menu Item Tax Class Override allows you to modify the tax rate applied to a certain group of menu items. This modification of the tax rate is predicated on a quantity threshold, and if the threshold value is met or exceeded, the tax class override will be applied to the tax rate of an item or items.

To apply a menu item tax class override:

1. Begin a check.
2. Add the menu items (from the configured menu item group) in the check until the quantity threshold is met.

If a check is split, the threshold only applies to each individual check, and not to the total amount between the checks. For example, if there are 7 total items added between two checks, and one check has 3 items and the other has 4 items with the threshold set to 4, the tax override will only apply to the check that has 4 items.

Similarly, if there are 4 total items added between two checks, and the threshold was set to 4 items—but each check took half of each item—the threshold would not apply because each check would only have 2 total items.

3. The tax class of the menu items will be modified as the quantity of the items in the check meets or exceeds the quantity threshold. This indicates that the tax class is overridden.

The tax class override modifies the tax rates in different ways. The tax rates affected by this modification are Add-on taxes and Inclusive taxes.

- For Add-on taxes, the total amount a customer pays will be affected by the tax class override.
- For Inclusive taxes, only the tax rate is overridden. In other words, the ratio of the tax to revenue is changed, while the menu item price remains the same.

4

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.

Adding Menu Items Using Screen Look Up (SLU)

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

1. Press one of the following function keys:
 - **Open Check SLU**
 - **Menu Item SLU**
 - **Tender Media SLU**
 - **Service Charge SLU**
 - **Custom Report SLU**
 - **Add/Transfer Check SLU**
 - **Discount SLU**
2. Press the SLU item key that you want to view, transfer, or add to the check.

Adding Menu Items Using Number Look Up (NLU)

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

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

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

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

- **Main Level NLU**
 - **Menu Item NLU**
 - **Service Charge NLU**
 - **Sub Level NLU**
 - **Tender/Media NLU**
2. If you do not know the number of a discount, menu item, menu level, service charge, or tender, select one of the function keys listed in Step 1.
 3. Select an item from the list or enter the NLU number of the appropriate item in the dialog box, and then click **OK**.

If the list is lengthy, you can enter the menu item name in the Select Item field to filter the list contents.

Splitting Off Items

1. To split off one item:
 - a. Select the menu item on the check, and then click **Split Off Item**.
 - b. Make the changes to the new check entry.
2. To split off multiple items:
 - a. Select a multiple quantity menu item on the check.
 - b. Using the alphanumeric key pad, select the quantity that you want to split (for example, 2).
 - c. Click **Split Off Item**.
 - d. Make the changes to the new check entry.

Splitting Off Items from a Suites Check

1. Press the **Pickup Suites Check** function key, enter the suite number, and then select the Suites check to split.
2. Press the **Touch Split** function key, and then move the items to be paid by another guest to the new Suites check.
3. Press **Save**, and then press **Yes** when prompted for confirmation.
4. If you are prompted for confirmation to print the new Suites check, press **Yes**.
5. Make the changes, and then end the current service round of the original Suites check that is open on the check detail area.
6. Add suites owner information to the new check. For instructions, see [Adding Suites Owner Information to a Check](#).

Conversational Ordering

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

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

- Drink Size (Small, Medium, Large)
- Drink Temperature (Hot, Iced)
- Condiments or Modifiers (Whipped Cream, Cinnamon, Skim Milk)

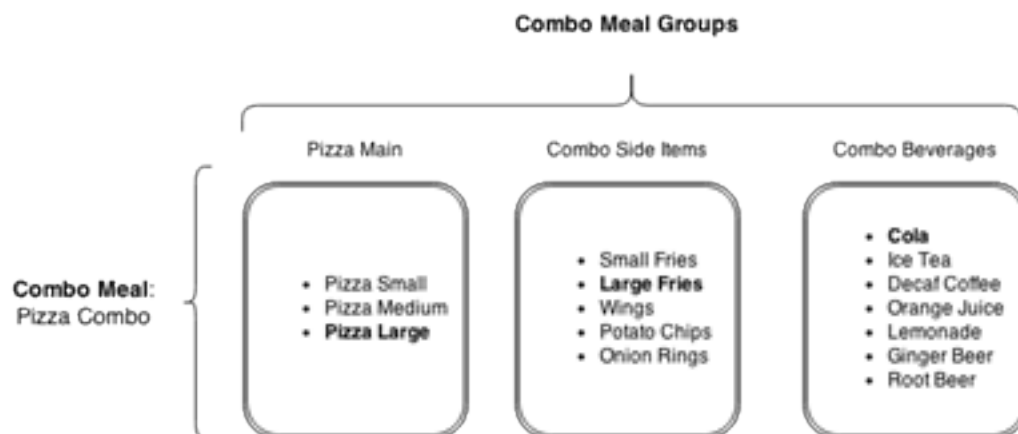
With conversational ordering, you can add the items in the order that the customer states them (for example, an iced mocha, medium size, with whipped cream). Conversational ordering improves speed of service, ease of ordering for customers, and overall order accuracy.

Combo Meals and Groups

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

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

Figure 4-1 Relationship Between a Combo Meal and Combo Groups



Creating Combo Meals

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

1. To view the types of combo meals you can create using the items on a check:
 - a. Click the **Auto Combo** function key.
 - b. To create one combo meal, click **OK** to confirm the combo meal.
 - c. To create multiple combo meals, select a combo meal from the Combo Meal dialog box, and then click **OK**.
 - d. If the combo meal requires additional side items to complete the meal, add the remaining side items, and then end the current service round.
2. To create a combo meal on a check from a primary menu item and a side item that make up a combo meal:

- a. Select the primary menu item of the combo meal, and then click the **Combo** function key.
 - b. If the combo meal requires additional side items to complete the meal, add the remaining side items, and then end the current service round.
3. To create multiple combo meals using the items on the check:
 - a. Click the **Combo Multi Selection** function key.
 - b. Select the items to use in the meal, and then click **Combo**.
4. If the workstation has separate buttons configured for combo meals:
 - a. Click the button configured for the base menu item of the combo meal (for example, Chicken Sandwich Combo).
 - b. Add the primary menu item and the side items to complete the meal, and then end the current service round.
5. To add a bulk combo meal order:
 - a. Click the **Bulk Combo Order** function key.
 - b. Enter the quantity that the customer requires using the on screen numeric key pad, and then press the button configured for the base menu item of the combo meal (for example, 10 Chicken Sandwich Combo). You can order up to 99 combo meals.
 - c. Enter the quantity, and then select the side menu items for the combo meal (for example, 5 Roasted Chicken).
 - d. Repeat Step 5-c to add the remaining side items, and then end the current service round.
6. To add a sized combo meal, click one of the buttons configured for the Combo Order Sizes 1 through 4.
7. To change the size (upsize or downsize) of a sized combo meal, select one or more side items from the check, and then click one of the buttons configured for the Combo Order Sizes 1 through 4.
8. To substitute a combo meal side item with another item from the same combo meal group:
 - a. Select the side item that you want to substitute from the check, and then click the **Substitute** function key.
 - b. Add a new side item.
9. To substitute a combo meal side item with an item from another combo meal group:
 - a. Select the side item that you want to substitute from the check, and then click the **Combo Alternate Side** function key.
 - b. Add a new side item.
10. To revert the items in the combo meal to à la carte menu items, select the primary menu item of the combo meal, and then click the **Un Combo** function key.
11. To remove a combo meal from a check, select the primary menu item of the combo meal, and then click the **Void** function key.

Condiments

Using the Popup Condiment Orderer

1. Sign on to the workstation and begin a new check.

2. Select a menu item which has required, or has optionally allowed condiment groups assigned to it. The Popup Condiment Orderer appears.
3. Select a required condiment. The Popup Condiment Orderer automatically advances to the second group, and so on until you have selected the required number of condiments from all groups.
4. If your location has set the condiment menu items to have a default count, or have the condiments set to match the parent menu items' count, after the minimum count's threshold had been reached, click **Done** to move to the next condiment or to close the Popup Condiment Orderer.

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

5. To modify a previously ordered required or allowed condiment:
 - a. Select a menu item (condiment or parent) in the check detail area. The Condiment Edit Popup appears if it is configured from the Enterprise Management Console (EMC) RVC Parameters or Menu Item Classes modules.

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

 - i. Select the menu item (condiment or parent) in the check detail area.
 - ii. Press the **Recall Popup Condiment Orderer** function key.
 - b. Change the condiments, and then press **Done**.

Declaring Waste

1. Click the **Declare Waste** function key.
2. Enter the menu item. If more than one of the same item is wasted, select the quantity, and then select the menu item to add to the waste check.
3. Select a waste reason, and then click **OK**.
4. Repeat Steps 2 and 3 to add menu items to the waste check.
5. Perform a service total on the check. A waste receipt prints and the workstation closes the waste check.

Correcting Waste Checks

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

1. Click the **Transaction Void** key, and then click the **Declare Waste** key.
2. Select the quantity, and then select the menu item you want to remove from the incorrectly entered waste check.
3. Select a waste reason, and then click **OK**.
4. Repeat Steps 2 and 3 to correct additional entries.
5. Perform a service total on the check.

Menu Item Waste Reports

Menu Item Waste Reports provide a list of discarded or donated menu items. You can generate waste reports by revenue center, menu item, employee, and waste reason. The following Menu Item Waste Reports are available:

- Waste Detail Report
- Waste Summary Report
- Employee Waste Report
- Menu Item Waste Report

The Waste Detail Report shows in-depth information about wasted menu items grouped by the waste reason, as described in the following table. You can filter the report data by waste reason.

Table 4-1 Waste Detail Report

Column	Shows
Check #	• The reason for discarding or donating the menu items. • The total number of menu items discarded or donated for the same waste reason.
Employee	The name of the employee that created the waste check.
QTY Menu Item	The quantity discarded or donated followed by the name of the menu item.
Amount	The price of the discarded or donated menu items.

The Waste Summary Report shows an overview of the menu items wasted and the corresponding waste quantity grouped by the waste reason, as described in the following table. You can filter the report data by waste reason.

Table 4-2 Waste Summary Report

Column	Shows
Waste Reason	• The reason for discarding or donating the menu items. • The employee who created the waste check. • The name of the discarded or donated menu items.
Quantity	• The quantity of menu items discarded or donated. • The total number of menu items discarded or donated for the same waste reason.

The Employee Waste Report shows a summary of the waste checks created by each employee, as described in the following table. When you filter the Employee Waste Report for an employee, the report shows a summary of the waste checks created by the selected employee.

Table 4-3 Employee Waste Report

Column	Shows
Employee	• The name of the employee that created the waste check. • List of reasons added to the waste checks that were created by the employee.
Quantity	• The quantity of menu items that were discarded or donated for each waste reason. • The total number of menu items discarded or donated.

The Menu Item Waste Report shows the waste reason and the quantity of menu items wasted grouped by menu item, as described in the following table. At the end of the report, a summary of menu items wasted for each family group is shown. You can filter the report by the family group.

Table 4-4 Menu Item Waste Report

Column	Shows
Item Name	• The name of the discarded or donated menu item. • The reason for discarding or donating the menu item.
Quantity	• The quantity corresponding to each menu item discarded or donated. • The total number of menu items discarded or donated.
Family Group	The family groups of each menu item discarded or donated appear as a summary at the end of the report.
Quantity	• The number of menu items discarded or donated for each family group. • The total number of menu items discarded or donated.

Menu Item Refills

Refills allow you to copy menu items from the previous round of the check to the current round, free of charge. This function is used on special occasions such as an all-you-can-eat buffet where customers can reorder menu items for free until a refill limit is reached. You can only refill menu items in the next round—after a check is service totaled, and only once per round.

There are two types of refill functions:

- **Refill Auto:** Initiates menu item refills. Shows a list of refillable menu items including condiments.
- **Refill Interactive:** Initiates menu item refills. Shows a list of refillable parent menu items and allows you to select the required and allowed condiments. You can only refill one menu item at a time using this function.

Returning and Voiding Refillable Items

The following must be taken into account when attempting to perform returns and voids on refill orders:

- You cannot return parent menu items that have one or more refills.
- You can void parent menu items with one or more refills. However, you must void all refills of the menu item in reverse chronological order (the most recent refilled item must be voided first) to void the parent menu item.

Refilling Menu Items

1. Pick up a check from the previous service round from the Open Check SLU.
2. To directly refill the items, select the menu items to refill from the check, and then press the **Refill Auto** function key or the **Refill Interactive** function key.
3. To refill items from a list or to view a list of all refillable items on the check:
 - a. Press the **Refill Auto** function key or the **Refill Interactive** function key without selecting any items on the check.
 - b. From the Select Items to Refill dialog, select the items to refill, and then press **Refill**.
 - c. To close the dialog, press **Close**.
4. If an order quantity was specified when adding a menu item in the first round, enter the number of refills when prompted.

For example, if a party of four ordered 4 glasses of Orange Juice in the first round, when you attempt to refill the order, the workstation prompts you to enter the number of refills. The initial menu item quantity is taken as the maximum quantity (in the aforementioned example, the maximum quantity is 4 when refilling).

When refilling multiple menu items with quantities, you must enter the refill quantity in the order that the menu items appear on the check. That is, the first entered number of refills is taken as the refill quantity of the first menu item, the second entered number of refills is taken as the refill quantity of the second menu item, and so on.

Repeatable and Non-Repeatable Menu Items

When you pick up a check, the check detail area shows a left-angle bracket (<) on the line of all menu items you can re-order using the **Repeat Round** function key. If a menu item is not repeatable, an asterisk (*) appears on the line of the menu items.

Figure 4-2 Repeatable and Non-Repeatable Menu Items

CHK 1665		EAT IN	
11/8/2013 2:36 PM			
1	Beef Brisket Sandwich	6.99	* 1
	Bama Pearl	*	1
	Chipotle	*	1
	Carolina Style	*	1
1	Btl La Playa Chard	18.00	< 1
1	Infinium Bottle	25.00	< 1
1	WB Cabernet	4.00	< 1
1	Buffalo Trace	6.00	< 1

Cannot be re-ordered using the [Repeat Round] key

Can be re-ordered using the [Repeat Round] key

Repeating Menu Items

You can copy several menu items from the previous round of a check to the current service round using a single button. This feature is used when customers want to re-order the same set of menu items for another round. Menu items are only repeatable for the first two rounds of the check.

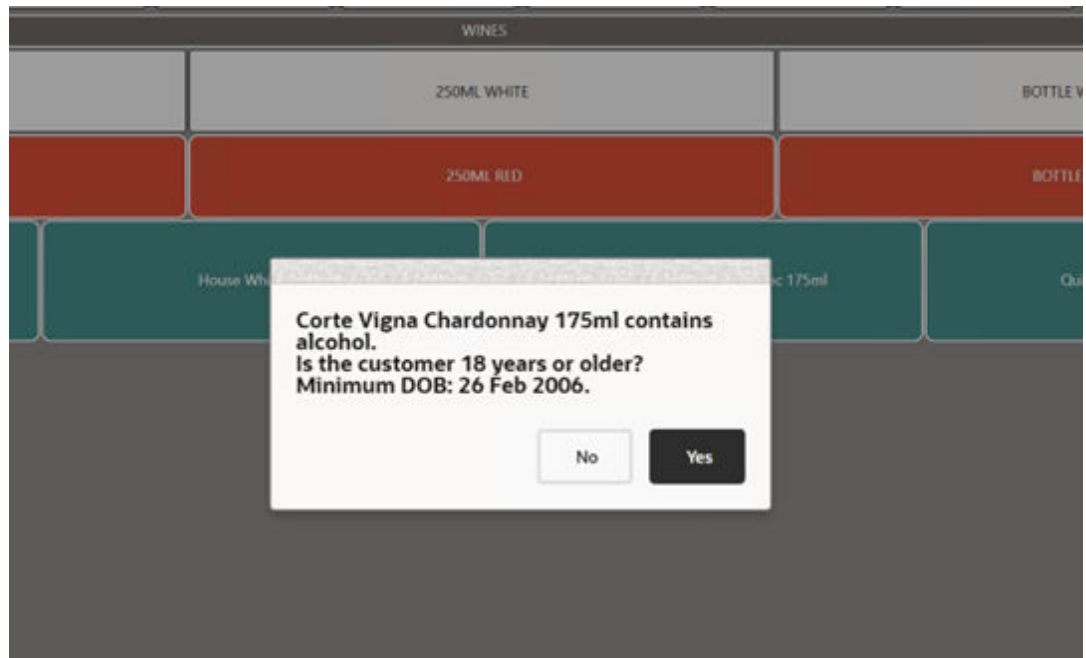
To copy repeatable menu items to the current round:

1. Pick up a check.
2. Press the **Repeat Round** function key.

Age Verification Plug-in Overview

The following steps provide a general overview of the age verification process on your workstation.

1. When adding an alcoholic beverage menu item to a check, an age verification prompt displays.



2. If the customer meets the age requirement, click **Yes**. The menu item is then added to the check.

 Note:

Any further additions of alcoholic menu items to the check in the same round will not prompt for age verification. If the check containing the alcoholic beverages is service totaled and picked up again, the age verification prompts again for the additional alcoholic beverage(s) added to that check.

3. If the customer doesn't meet the age requirements, click **No**.

Menu Item Information Check Detail Selection Plug-in

If the Menu Item Information extension application plug-in is configured, workstation operators can view and print nutritional and allergen information for menu items already added to the check.

1. Select a menu item in the check detail to which you want to add the menu item information.
2. Click **Menu Item Information**. The menu item information page appears, including the allergen and nutritional information for the menu item (if configured).

The allergen and nutritional information shown is for the selected menu item only. Condiments and modifiers do not augment the allergen and nutrition information.

Figure 4-3 Example of Menu Item Information

The screenshot shows a web interface for menu item information. On the left, there's a card for the 'Double Whopper' sandwich, priced at \$8.95. The card includes a description: 'Our Double Whopper Sandwich is a pairing of two 1/4 lb* savory flame-grilled beef patties topped with juicy tomatoes, fresh lettuce, creamy mayonnaise, ketchup, crunchy pickles, and sliced white onions on a soft sesame seed bun. *Weight based on pre-cooked patty'. On the right, there's a detailed nutritional and allergen information panel. The allergen section lists: 'Contains Bee Pollen/ Propolis, Beef, Chicken, Crustacean Shellfish, Egg, Fish, Milk, Molluscan Shellfish, Pork, and Royal Jelly.' The nutrition section lists: 'Calories 420', 'Calories from Fat 200', 'Total Fat 22g', 'Saturated Fat 8g', 'Trans Fat 0g', 'Cholesterol 190mg', 'Sodium 800mg', 'Carbohydrates 36g', 'Dietary Fiber 3g', 'Total Sugars 4g', 'Iron 7g', and 'Protein 21g'. At the bottom of the nutrition panel, a disclaimer states: 'Consuming raw or under-cooked meats, poultry, seafood, shellfish, or eggs may increase your risk of foodborne illness.' There are 'Print' and 'Add' buttons on the right side of the panel.

3. To add this menu item to the check, click **Add**.
4. To print a copy of the information on the receipt printer, click **Print**.

Figure 4-4 Example of Printed Receipt with Menu Item Information

The screenshot shows a printed receipt for a 'Double Whopper' sandwich. The receipt is formatted with dashed lines separating sections. The top section shows the item name 'Double Whopper' and the price '\$8.95'. Below this is a detailed description: 'Our Double Whopper Sandwich is a pairing of two 1/4 lb* savory flame-grilled beef patties topped with juicy tomatoes, fresh lettuce, creamy mayonnaise, ketchup, crunchy pickles, and sliced white onions on a soft sesame seed bun. *Weight based on pre-cooked patty'. The next section is titled 'CONSUMER ADVISORY' and contains the text: 'Consuming raw or under-cooked meats, poultry, seafood, shellfish, or eggs may increase your risk of foodborne illness.' This is followed by an 'ALLERGENS' section listing: 'Contains Bee Pollen/ Propolis, Beef, Chicken, Crustacean Shellfish, Egg, Fish, Milk, Molluscan Shellfish, Pork, and Royal Jelly.' The final section is titled 'NUTRITION' and lists the following values: 'Calories 420', 'Calories from Fat 200', 'Total Fat 22g', 'Saturated Fat 8g', 'Trans Fat 0g', 'Cholesterol 190mg', 'Sodium 800mg', 'Carbohydrates 36g', 'Dietary Fiber 3g', 'Total Sugars 4g', 'Iron 7g', and 'Protein 21g'. At the bottom of the receipt, it says 'Printed: 15-Mar-24 12:01:57 PM'.

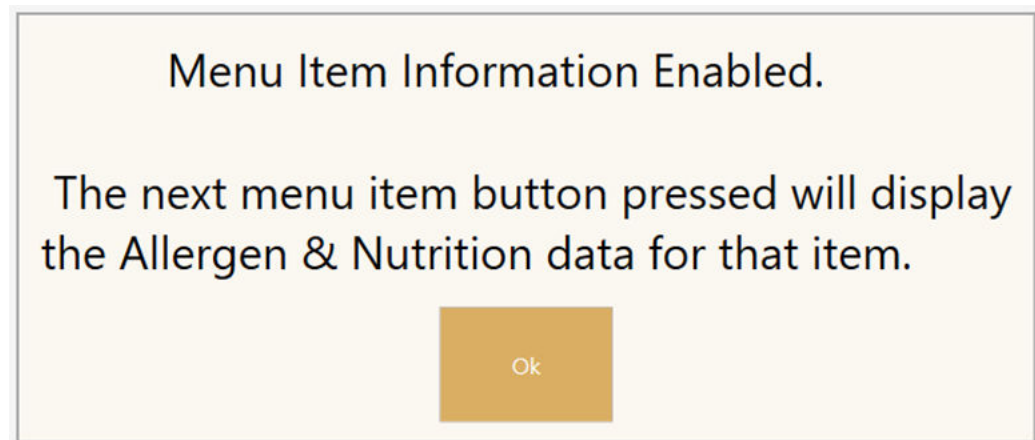
5. To close the menu item information display, click **Back**.

Menu Item Information Toggle Function

If the Menu Item Information extension application plug-in is configured, workstation operators can use the toggle function on the workstation to view menu item information.

1. If items are not selected in the check detail for an open check, click **Menu Item Information**, and then click **Ok** to enable the display of the next menu item you click.

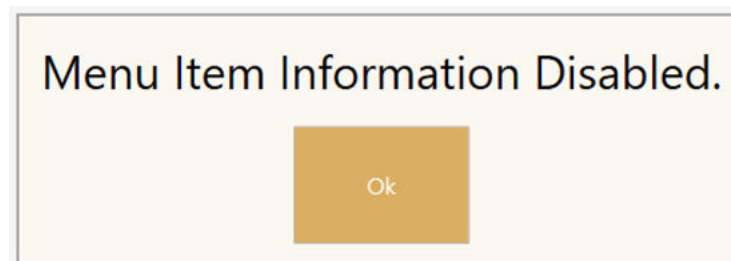
Figure 4-5 Menu Item Information Enabled Message



Simphony returns to regular operations after displaying the menu item information.

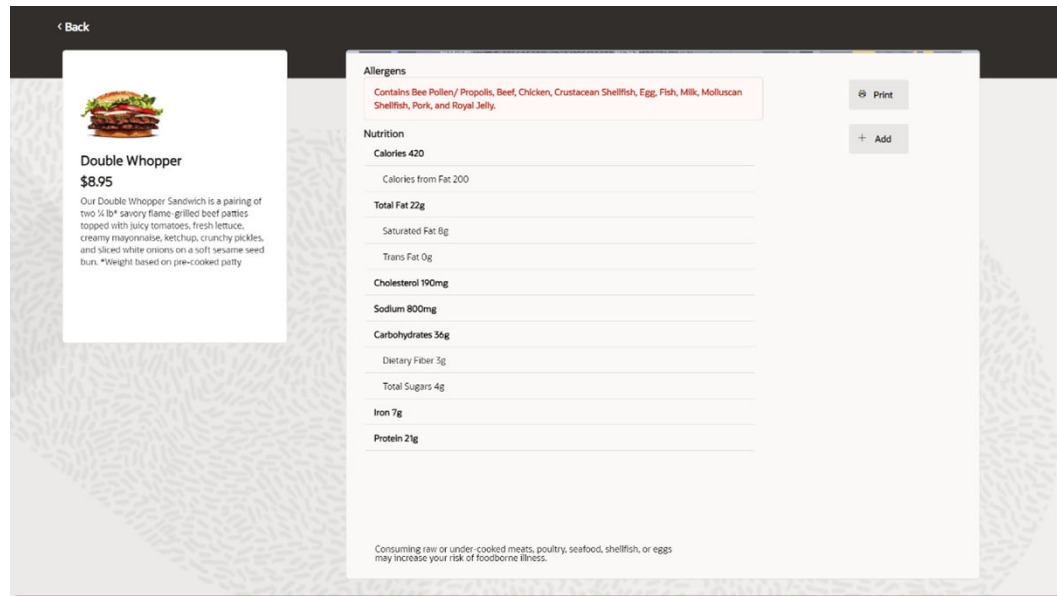
2. To disable the dialog, ensure that menu items are not selected, click **Menu Item Information**, and then click **Ok**.

Figure 4-6 Menu Item Information Disabled



3. With the Menu Item Information display enabled, click a menu item. The menu item information is displayed.

Figure 4-7 Example of Menu Item Information



- a. To add this menu item to the check, click **Add**.
- b. To print a copy of the menu item information on the receipt printer, click **Print**.
- c. To close the menu item information page, click **Back**.

5

Discounts and Service Charges

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

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

Table 5-1 Discount Types

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

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

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

Applying a Discount Manually

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

1. Begin a check and add menu items.
2. Select the button configured for the appropriate discount.
3. If the discount is an open discount, enter the discount amount or percentage, and then click **OK**.
4. If the workstation prompts, enter the discount reference details, and then click **OK**.
5. To apply a discount to a menu item on the check:
 - a. Select the menu item, and then select the button configured for the appropriate discount.
 - b. Repeat Steps 3 and 4.

Applying a Coupon

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

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

Applying a Service Charge

1. Pick up a check, and then select the appropriate service charge.
2. If this is an open service charge, enter the service charge amount or percentage, and then click **OK**.

Applying a Return

1. To return one menu item:
 - a. Pick up a check or begin a new check, and then click the **Return** function key.
 - b. Add the menu item to return to the check.
 - c. End the current service round or close the check.
2. To return more than one menu item:
 - a. Pick up a check or begin a new check, and then click the **Transaction Return** function key.
 - b. Add the menu items to return to the check.
 - c. End the current service round or close the check.

Applying a Condiment Discount

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

1. To apply a discount manually:
 - a. Add a parent menu item to the guest check.
 - b. Add the condiment that is configured to apply a discount.

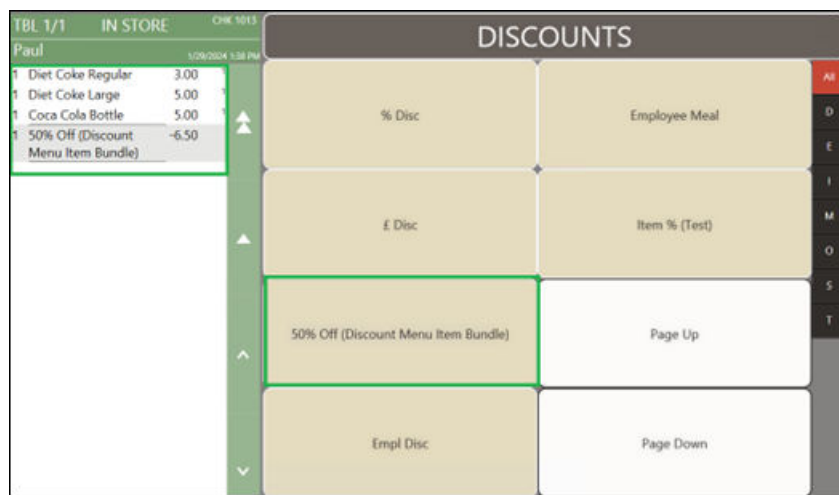
- c. Click the button that is configured for the manual condiment trigger function. Symphony applies the discount to the guest check.
 - d. Close the transaction.
 2. To apply a discount automatically:
 - a. Add a parent menu item to the guest check.
 - b. Add the condiment that is configured to apply a discount. Symphony applies the discount to the guest check.
 - c. Close the transaction.
 3. To apply a discount using a coupon:
 - a. Add a parent menu item to the guest check.
 - b. Add the condiment that is configured to apply a discount.
 - c. Click the button that is configured for the coupon condiment trigger function. Symphony applies the discount to the guest check.
 - d. Close the transaction.

Applying a Discount Bundle

Select the discount which is enabled for the **Discount Bundle**. The menu items configured in the data extension are automatically added to the check, along with the specific discount.

The following figure shows the discount selection for the discount bundle.

Figure 5-1 Applying the Discount Bundle



See [Configuring Discount Bundles](#) for more information.

6

Loyalty and Gift Cards

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

Performing a Loyalty Balance Inquiry

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key for loyalty points inquiry.
3. Swipe the card, enter the card number, or look up the account by name or phone number.
If a guest's card has been linked to multiple Stored Value and Gift card programs, select the program you wish to view.
4. A message appears indicating the loyalty account balance.
5. Click **Yes** to print the chit.

Issuing Loyalty Points

1. Begin a check and add items that trigger loyalty points.
2. Navigate to the gift and loyalty screen, and then select the function key to issue points to a loyalty account.
3. Swipe the card or enter the loyalty account number. A message appears indicating the points issuance.
4. Perform either a service total or tender the check.

Performing a Coupon Inquiry

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key to look up coupons.
3. Swipe the card or enter the loyalty account number. A list of available coupons appears.
 - If a check is open, select a coupon to redeem.
 - If a check is not open, click **Yes** to print the coupon.

Issuing Coupons

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key to issue a coupon.
3. Swipe the card or enter the loyalty account number. A list of ad hoc coupons appears.
4. Select a coupon.

Redeeming a Coupon

1. Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key to redeem a coupon.
3. Enter the coupon number obtained from the Gift and Loyalty Advanced website or email.

Transferring Points Balance

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key to transfer points balance.
3. Swipe the card or enter the card number of the account to transfer from.
4. Swipe the card or enter the card number of the account to transfer to. Both points and personal information transfer.

Performing Unique Items Inquiry

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

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key for unique items inquiry.
3. Swipe the card or enter the loyalty account number. A list of menu items that were ordered for the loyalty program appears.
4. (Optional) Print the list of items.

Applying a Loyalty Card to a Check

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

1. Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key for applying a card to a check.
3. Swipe the card or enter the loyalty account number. Depending on the Gift and Loyalty Advanced configuration, you can select from the following actions:
 - **Apply Coupon**
 - **Redeem Points** (redeem partial or full points associated with a loyalty account)
 - **Redeem SVC** (pay a check balance using a stored value card (SVC) (also known as a gift card))
 - **Apply Coupon and Redeem SVC**
 - **Issue Points**

Performing a Gift Card Balance Inquiry

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key for gift card balance inquiry.
3. Swipe the card, enter the card number, or look up the account by name or phone number.
If a guest's card has been linked to multiple Stored Value and Gift card programs, select the program you wish to view.
4. A message appears showing the monetary value available on the card.
5. Click **Yes** to print the chit.

Issuing Gift Cards

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to issue a gift card.
3. Swipe the card or enter the card number.
4. Enter the card amount.
5. Pay the check to a tender, such as cash or credit card.

Activating Gift Cards

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to activate a gift card.
3. Swipe the card or enter the card number.
4. Enter the preset card amount.
5. Pay the check to a tender, such as cash or credit card.

Reloading Gift Cards

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to reload a gift card.
3. Swipe the card or enter the card number.
4. Enter the amount to add to the card.
5. Pay the check to a tender, such as cash or credit card.

Transferring Gift Card Balance

1. (Optional) Begin a check and add items.
2. Navigate to the gift and loyalty screen, and then select the function key to transfer the gift card balance.

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

Authorizing Gift Cards

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

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to redeem a gift card with authorization.
3. Swipe the card or enter the card number.
If a guest's card has been linked to multiple Stored Value and Gift card programs, select the program to authorize.
4. Enter the amount to authorize from the card.
 - If the amount is less than or equal to the gift card balance, the authorization succeeds. The authorization approves only the gift card balance.
 - If the amount exceeds the gift card balance, the authorization fails.

Redeeming Gift Cards

1. Begin a check.
2. Navigate to the gift and loyalty screen, and then select the function key to redeem a gift card.
3. Swipe the card or enter the card number.
If a guest's card has been linked to multiple Stored Value and Gift card programs, select the program to redeem.
4. Enter the amount to redeem from the card.
 - If the amount is less than or equal to the gift card balance, the card balance is applied to the check and deducted from the card.
 - If the amount exceeds the gift card balance, the full card balance is applied to the check and the card balance becomes 0.00. Apply another tender (cash, credit card, or another gift card) to pay the remaining check balance.
 - If the check amount is zero, enter a value of zero when redeeming the card.

Note:

Some gift card drivers (using the Command Module / XProcessor) use a separate Gift Card Redemption function button. For Symphony Payment Interface (SPI) users, gift cards are redeemed by using the SPI payment function buttons (CC Auth, CC Final, or Authorization & Pay).

Cashing Out Gift Cards

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

Issuing a Batch of Gift Cards

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

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

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

Activating a Batch of Gift Cards

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

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

Redeeming a Gift Card and Issuing Points

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

1. Begin a check and add items.

2. Navigate to the gift and loyalty screen, and then select the function key to redeem a gift card and issue points.
3. Swipe the card or enter the card number.
If a guest's card has been linked to multiple Stored Value and Gift card programs, select the program to redeem.
4. Enter the amount to redeem from the card.
 - If the amount is less than or equal to the gift card balance, the card balance is applied to the check and deducted from the card.
 - If the amount exceeds the gift card balance, the full card balance is applied to the check and the card balance becomes \$0.00. Apply another tender (cash, credit card, or another gift card) to pay the remaining check balance.

The application automatically issues points to the account.

Voiding a Gift Card

If you are using SPI and you do not have privileges to void service charges from a previous round, when you attempt to void a gift card or a menu item that was added before the gift card (in the current round), authorization is required.

1. Create a check with the gift card.
2. Select the gift card.
3. Press the **Void** function key.

7

Check Payment

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

Tendering with Cash

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

Authorizing and Performing Cash Back

If cash back is enabled for the workstation, guests can request and receive cash back when paying a check with a debit card. The guest initiates the transaction through the PIN Entry Device (PED). Only the Authorize and Pay function is supported; cash back cannot be performed when finalizing a credit card authorization transaction.

The workstation operator must be authorized to perform cash back.

1. Press the **Authorize and Pay** function button.
2. When the PIN Entry Device (PED) lights up, swipe the debit card or enter the card number and expiration date, and then press **OK**.
3. On the Default SPI dialog, enter the amount to be tendered, and then press **OK**.
4. If the system is configured for tips, enter or confirm the tip amount.
5. On the Pinpad, press **Yes** for cash back when prompted, and then enter the amount of cash back required. The transaction is closed. The credit card voucher prints with the Cash Back amount.

Reauthorizing Released Credit Card Authorizations

You can now reauthorize a previously released credit card authorization on the same check without having to re-swipe a customers card. You need to have the appropriate privileges to perform the reauthorization of a released credit card authorization.

1. Reopen a closed check. For more information on how to reopen a closed check, see [Reopening a Closed Check](#).
2. In the check, highlight the payment.
3. Select **Void**.
4. In the check, highlight the authorization that needs to be reauthorized.
5. Press the function key **Reauthorize released CC Authorization**. If successful, a new authorization appears.

The following scenarios may also occur:

- If a user does not have the appropriate privileges to authorize, a prompt appears asking for a privileged user to authorize the transaction.
- If the Payment Service Provider (PSP) supports reauthorization but rejects the request, the user must obtain the card to process the authorization.
- If the PSP does not support reauthorization, a rejection message appears.

Tendering with One Credit Card

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

- Separate buttons for authorizing and finalizing credit card payments
 - One button to authorize and finalize credit card payments
1. If the workstation has separate buttons for authorize and finalize (sale):

- a. Press the **Credit Card Authorization** tender button.
- b. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**. The merchant and customer vouchers print (if configured). To abort the payment transaction from the workstation, press **Cancel**.

If your system uses the Oracle Payment Interface (OPI) and you previously performed a credit card authorization and then added menu items to the check (for example, a bar tab), you are prompted with **Select Existing Auth or New Card?**. The card does not need to be present after the initial authorization. If you select an existing auth, the card will receive a new authorization for the full amount, and a merchant voucher prints. (The original authorization is reversed by OPI.)

- c. Perform a service total.
 - d. Pick up the check.
 - e. Press the **Credit Card Finalize** tender button, enter the check amount, and then press **OK**. The customer receipt prints.
2. If the workstation has one button for authorize and finalize (sale):
 - a. Press the tender button configured for credit card sale payments.
 - b. Enter the check amount, and then press **OK**.
 - c. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**. Depending upon your configuration the merchant voucher, customer voucher, and the customer receipt either prints, does not print, or a prompt appears asking you to print. To abort the payment transaction from the workstation, press **Cancel**.
 - d. If your system uses OPI to process credit cards, after the guest signs the merchant voucher to authorize the credit transaction, you need to visually check to ensure that the signature on the merchant voucher matches the signature on the card.
 - If the signatures match, click **Yes** at the **Does the signature match the signature on the card?** prompt.
 - If the signatures do not match, click **No**. The payment is voided and a reversal request is sent to OPI. The check detail area appears, and the check remains open awaiting a new payment tender.
 - If multiple languages are configured, click **Translate** to change the **Yes**, **No**, and **Translate** buttons to the configured language. The prompt message is not translated in Symphony version 2.10.

Tendering with Multiple Credit Cards

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

- Separate buttons for authorizing and finalizing credit card payments
 - One button to authorize and finalize credit card payments
1. If the workstation has separate buttons for authorize and finalize:

- a. Press the **Credit Card Authorization** tender button.
- b. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**. The merchant and customer vouchers print (if configured).

If your system uses the Oracle Payment Interface (OPI) and you previously performed a credit card authorization and then added menu items to the check (for example, a bar tab), you are prompted with **Select Existing Auth or New Card?**. The card does not need to be present after the initial authorization. If you select an existing auth, the card will receive a new authorization for the full amount, and a merchant voucher prints. (The original authorization is reversed by OPI.)

- c. (Optional) Perform a service total.
 - d. (Optional) Pick up the check.
 - e. Repeat Steps 1-a through 1-d to authorize all credit cards.
 - f. Press the **Credit Card Finalize** tender button, enter the amount to charge the credit card, and then press **OK**. The customer receipt prints.
 - g. Repeat Step 1-f until the check is paid in full.
2. If the workstation has one button for authorize and finalize (sale):
 - a. Press the tender button configured for credit card sale payments.
 - b. Enter the amount to charge the credit card, and then press **OK**.
 - c. Swipe the credit card or enter the credit card number and expiration date, and then press **OK**. The merchant voucher, customer voucher, and the customer receipt print (if configured).
 - d. If your system uses OPI to process credit cards, after the guest signs the merchant voucher to authorize the credit transaction, you need to visually check to ensure that the signature on the merchant voucher matches the signature on the card.
 - If the signatures match, click **Yes** at the **Does the signature match the signature on the card?** prompt.
 - If the signatures do not match, click **No**. The payment is voided and a reversal request is sent to OPI. The check detail area appears, and the check remains open awaiting a new payment tender.
 - If multiple languages are configured, click **Translate** to change the **Yes**, **No**, and **Translate** buttons to the configured language. The prompt message is not translated in Symphony version 2.10.
 - e. Repeat Steps 2-a through 2-d until the check is paid in full.

Tendering with an Alternate Currency

1. Pick up a check, and then press the touchscreen button configured for the foreign currency. For example, if the customer is paying in Euros, press the **Euro** function key.
2. Take note of the amount due in Euros, and then press **OK**.
3. Press the **Cash** function key, enter the amount that the customer paid in Euros, and then press **OK**.

OPERA Self Pay Charges to a Room

OPERA Self Pay enables a guest to pay the check by adding payment to a room folio. OPERA Self Pay is supported with Symphony release 19.1 or later and the Oracle Hospitality OPERA 5 Hotel Property Systems release 5.0.04.01 or later.

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

- Oracle MICROS Tablet E-Series
- Tablet devices running the Android mobile operating system
- Zebra MC40 (formerly the Motorola MC40) mobile devices running on the Android mobile operating system and configured with either an integrated or external magnetic card reader

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

- View the check
- Add a tip or change the tip value
- Select a different language
- 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

Using OPERA Self Pay to Close a Check

The following steps explain the process in which a guest can close a check or room charge after ordering using OPERA Self Pay.

1. After clicking the button that corresponds to OPERA Self Pay on the ordering screen, the guest can do the following:
 - a. Review the check.
 - b. Select a desired language.
 - c. Click **Exit** to return to the ordering screen.
2. Click **Next** to proceed.
3. If the **Enable Tip Screen** option is selected, the guest is prompted to enter a tip. If the **Enter Default Tip Percentage** option is deselected and a default tip percentage specified, the **By Percent** field is populated with the default tip percentage. These fields are editable, and are reflected in the **Total Due** field.

4. Click **Check** to review the check after the tip is added.
5. After reviewing the check, click **Next** to proceed.
6. The guest is prompted to enter an email address to receive the optional receipt.
If the **Hide Email Prompt Screen** option is enabled in Symphony, the guest is not prompted to enter an e-mail address.
7. Click **Next**.
8. On the subsequent page, the guests enter the correct room number and last name. If one or both fields is either left empty or has the incorrect guest information, an error message appears.
9. Click **Next**. The signature prompt screen appears.
10. Guests can sign for their room charge using their finger. They may click the **Retry** button if the signature is illegible or if they want to rewrite their signature.
11. Click **Next**. A copy of the receipt with the guest signature is sent through email to the guest if they provided an email address.
12. After the transaction is processed, the guest is shown the final screen, which confirms a successful payment and shows the check details.
13. Click **Exit**.
 - a. If the **Exit OPERA Self Pay Without ID Prompt** option was enabled, clicking **Exit** takes the guest back to the order screen.
 - b. If the **Exit OPERA Self Pay Without ID Prompt** option was disabled, clicking **Exit** prompts for employee authorization.

Using PATT with Multiple Credit Cards

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

1. Add menu items.
2. Press the **Pay at the Table (PATT)** function.
3. (Optional) Select a different language from the drop-down list to translate the entry fields.
4. Select **Next** on the initial PATT page.
5. (Optional) To change the tip percentage or amount, on the Add a Tip page, tap the **Text** field, and then enter a different tip value.
6. Select **Share Payment**.
7. On the Select the share count page, select the **Share Count Number**, and then select **Next**.
The Share Count is the number of people sharing the payment. To change the **Share Count**, tap the **Other** text field, enter a different share count value between 1 and 9, and then select **Next**.
8. If the first guest wants to receive an electronic receipt with signature, enter a valid email address, and then select **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.
9. Swipe the first guest's credit card.
10. Enter the guest's signature on the device, and then select **Next**.
11. Repeat Steps 7 through 10 for each guest until the total amount is paid.

Using PATT with One Credit Card

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

1. Add menu items.
2. Press the **Pay at the Table (PATT)** function.
3. (Optional) Select a different language from the drop-down list to translate the entry fields.
4. Tap **Next** on the initial PATT page.
5. If the guest wants to change the tip percentage or amount, on the Add a Tip page, tap the **Text** field, enter a different tip value, and then tap **Next**.
6. To send an electronic receipt with signature to the guest, enter a valid email address, and then tap **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.
7. Swipe the guest's credit card.
8. Enter the guest's signature on the device, and then tap **Next**.

Using PATT for Single Demo Payment

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

1. Add menu items.
2. Press the **Pay at the Table (PATT)** function.
3. (Optional) Select a different language from the drop-down list to translate the entry fields.
4. Tap **Next** on the initial PATT page.
5. To change the tip percentage or amount on the Add a Tip page, tap the **Text** field, enter a different tip value, and then tap **Next**.
6. To send an electronic receipt with signature to the guest, enter a valid email address, and then tap **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.
7. Tap within the **Demo Card Swipe** text area.
8. Enter the guest's signature on the device, and then tap **Next**.

Using PATT to Close a Check Through a PMS Tender

1. Navigate to the Pay at the Table page, and then tap **Next**.
2. (Optional) Select a different language from the drop-down list to translate the entry fields.
3. If the guest wants to change the tip percentage or amount, on the Add a Tip page, tap the **Text** field, enter a different tip value, and then tap **Next**.
4. To send an electronic receipt with signature to the guest, enter a valid email address, and then tap **Next**. If the guest does not want to receive an electronic receipt, leave this field blank.
5. Press the **PATT Room Charge** function key.
6. Enter the guest's room number, and then tap **Enter**.

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

Charging Menu Items to a Room Folio using Transaction Services

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

1. From the **Type** drop-down list, select **Menu Item**, and then enter the value of the menu item in the **Number** field.
2. Click the **Add Item** button.
3. Click **Calculate Total** to see the menu item price.
4. (Optional) From the **Type** drop-down list, select **Service Charge**, and then enter the value of the service charge in the **Number** field.
5. (Optional) From the **Type** drop-down list, select the discount type (for example, Item Discount or Subtotal Discount), and then enter the value of the discount in the **Number** field.
6. From the **Type** drop-down list, select **Tender**, and then enter the value of the loadable payment module tender in the **Number** field.
7. In the **Value** field, enter the total amount due.
8. In the **Add Reference** field, enter the following information:
 - **Room Number**
 - **Serving Period**
 - **Guest Name**
 - **Payment Module**
9. Click **Post Transaction**. The guest room number and name appear on the closed check and print on the receipt.

Performing a Mail Order Telephone Order (MOTO) Transaction

A MOTO transaction is typically used for call-in, online, or mail orders. MOTO is considered a "card not present" transaction, meaning that the credit card is not available to be swiped or inserted into the PIN Entry Device (PED) at the time of the transaction, nor to compare signatures.

MOTO lets you initiate a transaction using a function key from the payment screen so that the PED lights up and accepts the manual entry immediately (rather than a card swipe or dip).

1. Sign on to the workstation and begin a check.
2. Add menu items to the check.
3. On the Payment screen, click the **MOTO** button.
4. When prompted, enter the payment card information.

Dividing a Check Into Equal Partial Payments

Follow this procedure to divide a check into equal partial payments. This feature applies to all supported devices (Windows and Android), including handheld devices.

1. Press the **Equal Payment On/Off** function.

When the **Equal Payment On/Off** function is toggled on, access only to the payments screen and the following functions is allowed:

- Equal Payment On/Off (to exit)
- Service Total
- All Payments (Cash Over Tendering, Credit Authorization, Credit Auth. & Pay, Room Charge, and so on)
- Currency Conversion & Tender
- Language Translation
- Credit Voucher Reprint
- Credit Finalization
- Redraw Page Content
- Popup Numeric Keyboard
- Popup Alpha Numeric Keyboard
- UI Navigation Related Commands (Next Page, Previous Page, Clear Key)
- PMS Inquire
- Save Order
- Stored Value Functions
- Loyalty Functions
- Extensibility Functions, including:
 - SIM Inquire
 - Run Extensibility App
 - Run Extensibility App From File

2. In the **Equal Payment** window, enter the number of equal payments in the check (ranging from 2 to 99).

For example, to divide a check into three equal partial payments, select **3**.

3. After entering the number of equal payments, the notification area at the top of the screen shows the amount due for the current equal partial payment and the total number of equal partial payments.

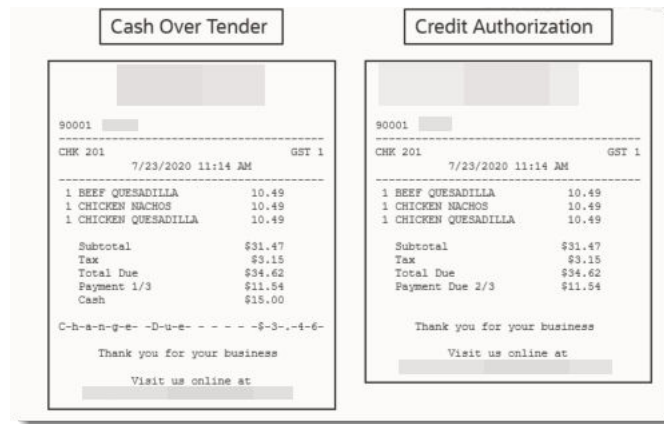
When over tendering a cash equal payment, a change dialog is also shown in the notification area. Rounding differences are then applied to a partial equal payment.

4. After payment finalization, the guest check and customer receipts print, detailing the menu items, subtotal, tax, total due and each equal partial payment amount including tips or change.

When using Cash Over Tender as an equal partial payment, the cash payment and change due will be printed on the receipt.

When using Credit Authorization as an equal partial payment, the amount due will be printed on the receipt.

Figure 7-1 Equal Payment Receipts



Pay Using QR Code

Click the **Service Total** function key. The QR code appears on the printed guest check.

The guest scans the QR code on their check, which opens a browser on their mobile device and loads the check. After payment is complete, the check is closed in Symphony and shows the payment method that was used by the guest.

Using Consumer Self Pay to Close a Check

The following steps explain the process in which a customer can close a check using an Adyen Castles S1F2 device.

1. After clicking the button that corresponds to Consumer Self Pay on the ordering screen, the customer can review their check, and then click the **Pay** button to proceed.
 - a. If the customer wishes to change the language of the device prior to payment, they can click the **X** on the check detail screen, click **Change Language**, and then select their desired language from the list of available languages.
 - b. If the customer wishes to cancel their payment due to an error or otherwise, they can click the **X** on the check detail screen, click **Cancel Payment**, and then the employee is prompted to enter their employee ID number in order to exit Self Pay.
2. Next, the customer is prompted on the device to choose one of the default tip percentages, or if they wish, to enter a custom tip amount or tip percentage.
3. The customer then clicks **Pay Now** to finalize the payment.
4. On the following screen, the customer is prompted to present a card payment.
5. After the payment is authorized and approved, the customer is presented with the following options on how to receive their receipt:
 - **Print:** The device prints two copies of the receipt (one for the customer and one for the merchant).

- **Email:** The customer enters their email address on the device, and the receipt is sent to their provided email. This option is disabled if the **Disable Email Receipt** option is selected in EMC Page Design.
 - **Email and Print:** The device prints the receipts, and sends a receipt to the customer's email address. This option is disabled if the **Disable Email Receipt** option is selected in EMC Page Design.
 - **No Receipt:** No receipts are printed or emailed for the customer.
6. After the customer finishes the transaction, they are prompted to return the device to the employee.
- a. If the **Exit Self Pay Without ID Prompt** option was enabled, the device returns to the order screen.
 - b. If the **Exit Self Pay Without ID Prompt** option was disabled, the employee is prompted to enter their ID number to exit Self Pay.

8

Engagement Cloud Service

The Engagement Cloud Service is Symphony'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 Symphony installation.

There are two types of pages in the Engagement UI:

- **Welcome Page:** Initial page that appears on tablet devices.
- **Hub Pages:** Pages that appear on the tablet after workstation operators sign on and press the **Hub** button.

Pages can contain widgets that enhance workstation functionality. For example, you can view daily specials, image slideshows, a Twitter feed, and Oracle Hospitality Reporting and Analytics reports on the tablet's touchscreen (depending on the configuration).

Engagement Auditing Tool

You can track a variety of operations using the Engagement configurator. The auditing tool tracks and provides the date and time, user ID, user name, actions that were performed, and additional details about each operation.

The Engagement auditing tool provides information about the operations listed in the following table:

Table 8-1 Engagement Auditing Tool Tracking Information

Operation Category	Operation
Administrative (User)	• Successful and failed logins • Log outs from the configurator • Synchronizations performed
Page	• Creating, deleting, and cloning a page • Changing the theme of a page • Assigning, removing, and cropping a logo on a page
Widget	• Adding and removing a widget on a page • Saving a widget's template name • Changing the size of a widget (both previous and new sizes) • Changing the widget name (both previous and new names) • Uploading, removing, and cropping a widget background image

Using the Engagement Auditing Tool

1. Click the **Menu** bar, and then click **Audit**.

2. Filter your search by selecting a **Category** or **Date Range**, or enter a keyword in the **Search** text box.
3. Click **Filter**.

Tracking Engagement Usage

You can track the number of organizations, workstations, and employees using Engagement.

Click the **Menu** bar, and then click **Usage**. You can view the following:

- Adoption rate
- Widget use
- Frequency with which the Hub page is opened

You can filter the usage information by:

- Organization
- Timeframe
- Custom Date Range (Start and End dates)

9

Dining Room Management

Hosting staff can manage seating capacity, available server staff, guest seating preferences, dining table status, the wait list, and reservation list. When using the Table Management System (TMS), many functions require a long-press. To perform a long-press, right-click on the function or page area, hold down the right mouse click for a second, and then select an option.

Host Command Area, Display, and Legend

Host Command Area

In most cases, the administrator creates the hosting page with a designated Host Command Area. The Host Command Area contains many of the hosting staff and manager functions for the table management system (TMS).

Host Display

The Host Area Display option allows you to view the following information:

- Show Legend
- Show and Hide Dining Table Status
- Show and Hide Reservation List
- Show and Hide Employee Lines
- Show and Hide Wait List
- Show and Hide Section Layout
- Show and Hide Sections
- Show and Hide Table Decorators
- Show and Hide Employees

Information that appears dimmed has not been configured for use in the Host Area.

Host Legend

The Legend Area show information about the following visual features of the Table Management System (TMS):

- Table Decorators

The decorators indicate one or more table statuses. A decorator covers all or a portion of the table in the Dining Table Layout screen. You can hide certain decorators by removing the check mark next to the decorator and clicking OK. The table decorators are preset in the application.

Table 9-1 Table Decorators

Decorator	Description
Clean	The table is clean.

Table 9-1 (Cont.) Table Decorators

Decorator	Description
Dirty	The table is dirty.
Close	The table is closed.
Reserved	The table is reserved.
Parent	The table is a parent to one or more child tables. This is the primary table when joining tables.
Child	These tables are joined to a parent table.
Seated	Hosting staff recently seated a guest at the table.
Occupied	A guest is occupying the table.
Printed	The server printed the guest check for the guests at the table.
Paid	The guests at the table tendered the guest check.
User Suggested	This is the table that the host or guest requested as part of the reservation or wait request. This decorator appears only when you select a request that is waiting to be seated.
System Suggested	This is the table at which the system suggests the reservation or wait request be seated based on configuration to more efficiently manage dining activities. This decorator appears only when you select a request that is waiting to be seated.
Selected	This decorator indicates that you have selected the table and it is available for an action or update. You can select more than one table. This table decorator cannot be hidden.

- **Course Decorators**

Course decorators show the current dining course for the guests on the table. Updates to the table occur as menu items are saved to the guest check and when a specific event occurs in the Kitchen Display System (KDS) (such as bumping an order).

- **Employee Colors**

A color assigned to the employee appears on the host page to distinguish one employee from another. All TMS features that show the employee use this color as the employee indicator. If no TMS Color is defined for the employee's Operator record, white appears to identify the employee.

- **Section Colors**

A section color indicates tables that are assigned to sections.

- **Service Alerts**

Service Alerts can change the Alert color window, based on the length of elapsed time since a server performed an action on the guest check for the table. When an action occurs, the Service Alert resets and the counter starts at zero. The Service Alert also shows the cover count for the table. If multiple guest checks are open on the table, the Service Alert also shows the number of checks and cover count for each check.

- **Check Alerts**

Check Alerts can change the Alert color window, based on the length of elapsed time for the guest check on the table. The Check Alert indicates the length of time (in hours and minutes) the guest has occupied the table and whether the table is expected to be available soon.

- Employee Totals

The Employee Totals window appears after you click the More button in the Legend. Employee Totals provides information about the current workload and statistics for servers assigned to tables in the revenue center for the current business date. Click OK to close the Employee Totals window and return to the Legend.

Dining Table Status

The Dining Table Status dialog shows detailed information about the table and open guest checks on the table. You can manage this dialog on its own page or as a popup in the host view.

The Dining Table Status supports gesture swipes. The arrows indicate that you can swipe through the area through (left, right, up, and down). When you swipe your finger on the screen from left to right the application cycles through information on the guest check. If multiple checks are present on the table, a top and bottom gesture option appears, allowing you to cycle through any of the guest checks on the table.

To show the Dining Table Status dialog, long-press on the Host Command area and select **Show Dining Table Status**.

To hide the Dining Table Status dialog, long-press on the Host Command area and select **Hide Dining Table Status**.

You can view the following information on the Dining Table Status dialog:

- Table Details
 - Current Section Assignment
 - Current User Assignment
 - Table Image with Table Name and Decorators: A set of navigation icons facing left and right appears. To cycle through each table, swipe the icon in the direction it is pointing to advance one table at a time.
 - Current Seating Capacity
 - Associated Child Tables (if parent): When you merge two or more tables and select the parent table, the Dining Table Status dialog shows information about the child table. When you select a child table, the Dining Table Status dialog shows information about the parent table. If a parent table has more than one child table, the first child table is shown followed by an ellipsis (...).
- Check Details
 - Current Check Count: If the table contains multiple checks, a pair of navigation icons facing up and down appear. To cycle through each check, swipe the icon in the direction it is pointing to advance one check at a time.
 - Current Cover Count
 - Financials (per check)
 - Current Course and History (per check): To view the Course History, a set of navigation icons facing left and right appears in the Check Details portion of the Dining Table Status dialog. To cycle from the Financials to the Course History, swipe the icon in either direction to advance.

Employee Lines

After you assign employees to tables and sections, an optional Employee Lines feature shows the table assignments. A line appears from the employee name label to the table.

To show Employee Lines, long-press on the Host Command area and select **Show Employee Lines**.

To hide the Employee Lines, long-press on the Host Command area and select **Hide Employee Lines**.

Section Layout

The Seating Section Layout allows hosting staff to quickly select tables to be used in the revenue center, and assign section and employees. You can manage the Section Layout on its own page or as a popup in the host view.

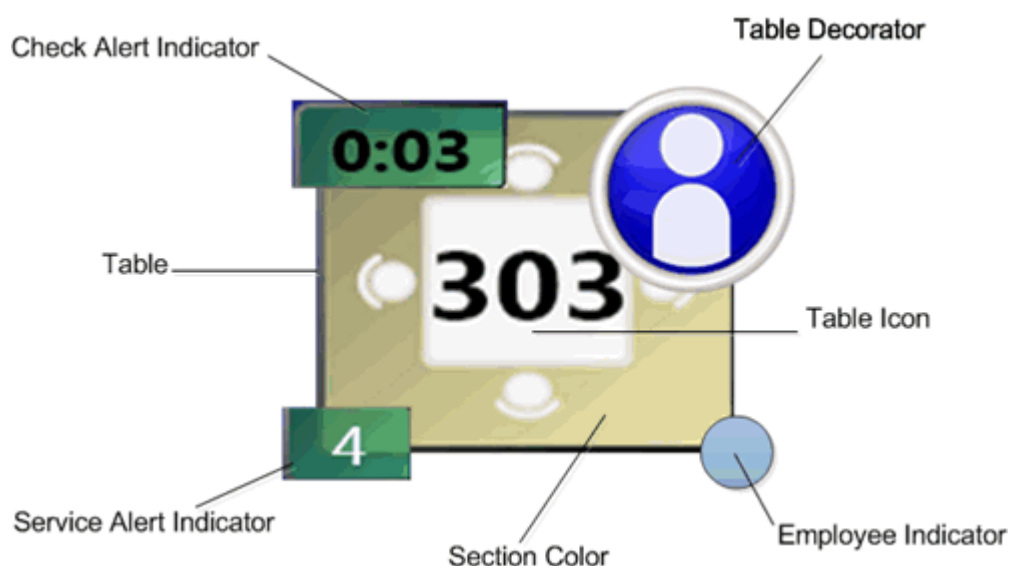
To show the Section Layout, long-press on the Host Command area and select **Show Section Layout**.

To hide the Section Layout, long-press on the Host Command area and select **Hide Section Layout**.

Enhanced Table Status and Functions

Enhanced tables provide graphical images that represent dining statuses and indicators. The following example table illustrates several of the status and indicator icons that might appear on a seated table.

Figure 9-1 Table Status Example



The on-screen table provides a visual indication of the current table and check status and assignment information. The following table information is shown by default.

- Section Color
- Table Decorator
- Employee Indicator Color

You can change the status of:

- Open Tables
- Occupied Tables
- Closed Tables

Long-press on a table without seated guests to see the functions available on an open table. The following table lists the functions you can perform.

Table 9-2 Open Table Functions

Table Function	Description
Quick Seat	Rapidly seat guests at a table without adding them to the Wait List. An employee assignment done during the Quick Seat process is used only for the guest check started during the Quick Seat process. Use the Assign Employee function to permanently change the employee assigned to the table.
Begin Check	Create a new guest check on the selected table. Using the Begin Check function from the table does not include the guest check in Table Management System reporting. Oracle Hospitality recommends that you do not begin a guest check from this function.
Assign Section	Assign the table to a different section. The section override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears.
Select Employee	Assign the table to a different server. The employee override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears.
Set as Clean	Indicate that a table is clean and show the Clean table decorator. A clean table is available for seating.
Set as Dirty	Indicate that a table is dirty and show the Dirty table decorator. A dirty table is unavailable for seating.
Close Table	Indicate that a table is closed and show the Closed table decorator. A closed table is unavailable for seating.
Reserve Table	Indicate that a table is reserved for a party arriving in the future and show the Reserved table decorator. A reserved table is not suggested by the system when seating from the Wait List.
Merge Table	Join two or more tables. The application prompts you to select the table to merge into. The tables remain merged until you deactivate the section layout or activate a different layout. Both parent and child tables update the table decorator. The application might prompt you to indicate the number of seats available with the newly merged tables. The cumulative number of seats between all merged tables appears by default.

Table 9-2 (Cont.) Open Table Functions

Table Function	Description
Change Table Capacity	The application might prompt you to change the seating capacity of a table. The table retains the override capacity until you: • Manually update the table • Deactivate the section layout • Activate a different layout

Long-press on a table with an open guest check to see the functions available on an occupied table. The following table lists the functions you can perform.

Table 9-3 Occupied Table Functions

Table Function	Description
Begin Check	Add a guest check to the selected table. Using the Begin Check function from the table does not include the guest check in Table Management System reporting. Oracle Hospitality recommends that you do not begin a guest check from this function.
Pickup Table (Check#)	Pick up an existing guest check on the table. Ownership of the check transfers to the employee performing the pickup.
Unseat Table (Check #)	Returns the guest to the Wait List and makes the table available. If a guest check was already on the table, it becomes lost.
Assign Section	Assign the table to a different section. The section override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears.
Select Employee	Assign the table to a different server. The employee override is valid only for the duration of time in which the current section layout is active. When you activate a new section layout, the override clears. Pre-existing guest checks remain with the original employee.
Set as Clean	Indicate that a table is clean and show the Clean table decorator. A clean table is available for seating.
Set as Dirty	Indicate that a table is dirty and show the Dirty table decorator. A dirty table is unavailable for seating.
Close Table	Indicate that a table is closed and show the Closed table decorator. A closed table is unavailable for seating.
Reserve Table	Indicate that a table is reserved for a party arriving in the future and show the Reserved table decorator. A reserved table is not suggested by the system when seating from the Wait List.

Table 9-3 (Cont.) Occupied Table Functions

Table Function	Description
Merge Table	Join two or more tables. The application prompts you to select the table to merge into. The tables remain merged until you deactivate the section layout or activate a different layout. Both parent and child tables update the table decorator. The application might prompt you to indicate the number of seats available with the newly merged tables. The cumulative number of seats between all merged tables appears by default.

Long-press on a closed table to see the functions available. The following table lists the functions you can perform.

Table 9-4 Closed Table Functions

Table Function	Description
Open Table	Indicate that a table is open and remove the Closed table decorator. An open table is available for seating.
Change Table Capacity	The application might prompt you to change the seating capacity of a table. The table retains the override capacity until you: • Manually update the table • Deactivate the section layout • Activate a different layout

Selecting a Table

You can select one or more enhanced tables on the host page by touching a table or using the Select Table option.

1. Touch one or more tables on the host page. If a table decorator is defined for the Selected status, the decorator appears on the table.
2. To use the Select Table option:
 - a. Long-press on the Host Command area, and then select **Select Table**.
 - b. Select one of the following options:
 - **All Tables**
 - **None** (A quick way to deselect all tables)
 - **By Employee(s)** (Only available with tables assigned to one or more employees)
 - **By Section(s)** (Only available with tables assigned to one or more sections)

Creating and Deleting a Section Layout

A Seating Section Layout allows hosting staff to quickly select tables in a revenue center and assign them to a section or to employees.

1. Open a Section Layout page, and then click **Create Layout**.
2. From the Create Layouts dialog, select **New Layout**, and then select **Create Layout**.

If table or section layouts are set at the enterprise level, the layout templates appear in the Create Layouts dialog. You can select an existing template for use in creating the new layout.

3. Enter a name that reflects the purpose of the layout, and then click **OK**. For example, if you are creating a layout to accommodate a service staff of 5 during the breakfast serving period, you might name the layout Breakfast 5.
4. To remove a layout that you no longer need:
 - a. Click the **More...** button.
 - b. Select **Delete Layout**.
 - c. Select the layout you want to remove, and then click **OK**.

Changing a Section Layout

1. Click the **Load Layout** button.
2. Select the layout you want to change, and then click the **Load** button.

If you selected a section that was created from a template, table numbers could be assigned to sections within the list. You can alter the table numbers for the layout. If the section was not created from a template, no assignments exist for the section.

3. To assign a table to a section:
 - a. Highlight the section.
 - b. Touch the table on the workstation screen to add the table number to the section.
 - c. Long-press on the section, and then select **Assign Table**.
 - d. Select the appropriate Table ID and Table Name to assign. The POS client shows a list of tables that are not associated with a section.

You can select **Unassign Table** to remove a Table ID and Table Name from the section.

4. To assign an employee to a section:
 - a. Long-press on the section, and then select **Assign Employee**.
 - b. Select the employee to assign. If the section has an employee assigned, None appears to allow you to unassign the employee from the section.

5. Click the **Save** button.

The **Save As** button allows you to save a copy of the loaded layout with a different layout name. You can use the **Save As** button to make minor changes from one layout to another rather than re-creating a new layout.

- a. Click the **More...** button.
- b. Select **Save As**.
- c. Enter a name that reflects the purpose of the layout you are saving, and then click **OK**.

Activating and Deactivating a Section Layout

Activate a layout to assign employees to sections and tables. Activating a new layout establishes the next employee to open a guest check on a table. Changing the active layout does not change the ownership of open guest checks.

Deactivate a layout to quickly clear all section and employee assignments for the tables. Tables with open guest checks appear with the Occupied status. Guest check ownership does not change when deactivating a layout.

1. To activate a section layout:
 - a. Click the **Load Layout** button.
 - b. Select the layout to apply, and then click the **Activate** button. The layout appears as the active table layout.
2. To deactivate a section layout:
 - a. Click the **More...** button.
 - b. Select **Deactivate Layout**. Assigned sections and tables disappear.

Closing a Section Layout

Follow these steps to close a layout and return to the active layout:

1. Click the **Close Layout** button.
2. If you made layout changes without saving, the application prompts you to save the changes or cancel without saving.

Changing Server Availability

This option allows hosting staff to place an employee as unavailable for a duration of time (such as breaks). An unavailable employee is not included in table assignments. Follow these steps to change a server to unavailable for 15 minutes:

1. Long-press on the Host Area, and then select **Server Availability**. The Edit Server Availability dialog appears. This list shows active employees who are assigned to tables in the revenue center.

If you do not have the Edit Server Availability privilege, the application prompts you for authorization.

2. Select a server from the list.
3. Click the **+** and **-** buttons to change the length of time during which the server will be unavailable, and then click **OK**.

After 15 minutes (or the amount of time you set) elapses, the application automatically changes the server to available for table assignments. To change an unavailable server to available before the time duration elapses, repeat Steps 1 through 3, clicking the **Available** button (rather than the **+** and **-** buttons).

Hiding Colors and Table Decorators from a Table

1. Long-press on the Host Command area.
2. Select one of the following options:
 - To hide section colors, select **Hide Sections**.
 - To hide employee colors, select **Hide Employees**.
 - To hide decorators, select **Hide Table Decorators**.

Viewing the Employee Section Assignment Report

Follow these steps to run the Employee Section Assignment Report:

1. Open the Reports List on the workstation.
2. Select the **Employee Section Assignment Report**, or enter the Report Number, and then click **OK**.
3. (Optional) Change the revenue center in the **View** field.
4. Click the **Run Report** button. Results appear in the **Print**, **Display**, and **Stats** tabs of the Reports form.

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

5. (Optional) To print the report on the receipt printer, click the **Print** button.
6. Click the **Close** button to close the Reports form.

Seating Management

All seating requests on the Wait List automatically move up or down in the list depending on the configuration. Oracle Hospitality recommends that you seat requests at the top of the list first, working down the list.

After a guest table request appears on the Wait List (either by adding a wait request or a reservation that moved to the Wait List), and a table is available, hosting staff can seat the guest. You can use one of the following methods:

- Seat the request from the Wait List on a host page
- Perform a Quick Seat

Viewing Estimated Wait Times

The Estimated Wait Times option shows the estimated amount of time remaining until the application anticipates each request being seated.

1. Long-press on the Host Area, and then select **Estimated Wait Times**. The following information appears in the columns:
 - Cover Count: The number of people that the table capacity allows.
 - Estimated Wait Time: The estimated time remaining until a table is available for the cover count.
 - Projected Table: The system suggested table number for the request.
 - Projected Server: When employees are assigned to tables, the probable server name appears.
2. Click **OK** to close the Estimated Wait Times list.

Greeting the Guest

The Greet Guest feature allows hosting staff to greet guests who arrive earlier than anticipated or with reservations on future days. You must have the Greet Wait List Entry privilege to use the Greet Guest feature.

1. Double-tap quickly on either the Reservation List or Wait List to open it.
2. Long-press on the request, and then select **Greet Guest**. If a reservation request is not present on the Wait List, it moves from the Reservation List to the Wait List. When the hosting staff selects Greet Guest, a future reservation appears on the Wait List, but the reservation record does not move to today's date.

Seating a Guest from the Wait List

Follow these steps to seat a guest request from the Wait List on the host page.

1. Double-tap quickly on the Wait List to open it.
2. Select the wait list request.
3. Select the table for the guest.

A checkmark indicates the system or user suggested table for the party. (Depending on the configuration, the table suggestion icons might be different.) If you attempt to seat a guest at a table that does not meet the system requirements or guest preferences, the application prompts you for authorization if you do not have the appropriate privilege. Depending on the configuration, the application might prevent you from seating a party that is smaller or larger than the selected table can accommodate. For example, when you attempt to seat a cover count of 1 or 6 at a table whose minimum is 2 and maximum is 5, the application prompts you to confirm the cover count upon seating.

4. If prompted, select a server to assign to the guest check.
5. Click **Yes** at the prompt to begin a new guest check. Seat the guest at the table.

Depending on the configuration, a guest information chit might print after seating the guest from the Wait List. This chit contains information about the table request, such as guest name, VIP status, party size, revenue center, table assignment, table preferences, server name, seating date and time, and special requirements.

Seating a Guest Using Quick Seat

You can rapidly seat a guest using the Quick Seat feature without adding them to the Wait List.

1. While there are no records selected on the Wait List, use one of the following methods to start the Quick Seat process:
 - Double-tap the table.
 - Long-press the table and select **Quick Seat**.

See [Enhanced Table Status and Functions](#) for more information on the Quick Seat function and how the function operates when you use the long-press method.

2. Change the Cover Count on the Quick Seat dialog by entering a new number, or using the + and – buttons, and then clicking **OK**.
 - If you attempt to quick seat a guest with covers below or above the minimum or maximum table capacity, the application prompts you to confirm.
 - If you attempt to quick seat a guest at a table that does not meet the system requirements (for example, the table is unavailable or unassigned), the application prompts you for authorization if you do not have the appropriate privilege.
3. Click **Yes** to begin a new guest check.

Unseating a Table

If the guest wants to move to another table after being seated, you can unseat them and re-seat the guest at a different table. You can only unseat a table if the guest has not ordered menu items. After a guest check is open on a table, you cannot use the Unseat Table feature.

Perform a long-press on the table with the seated guest, and then select **Unseat Table**.

- If the guest was previously seated from the Wait List, the guest's name appears on the Wait List.
- If the guest was previously seated using Quick Seat, the guest appears on the Wait List as QS in the guest name column.

Reservation List

The Reservation List contains all reservation requests for the revenue center. Hosting staff with access to the Reservation List can create, edit, and cancel reservation requests from this list. You can manage the Reservation List on its own page or as a popup in the host view.

The months of the year appear horizontally near the top of the Reservation List, and the dates appear vertically along the side. You can click the right arrow button (>>) to switch the reservations list view between the following:

- Show assigned reservations and remaining available reservations (default)
- Show assigned reservations only

Reservations appear sequentially by time with the configured Seats. The initial date and time shown are based on the current date and time. The allocations for times appear before the current time (to differentiate between current and future times).

The Reservation List shows the following information in columns:

Table 9-5 Reservation List Information

Column Name	This Column Indicates...
Time	The time when the reservation is scheduled to be seated. Reservations are listed sequentially by time.
Seats	The table seating capacity of each reservation.
[Icons]	The relevant reservation icon for each reservation (for example, phone, Internet, VIP, or cancelled). Reservation List Icons contains a list of icon images and a description of each icon.
Guest Name	The name in which the reservation was created.
Confirmation Number	The confirmation number that the application issues after a workstation operator or guest creates a reservation.
Covers	The number of guests (actual party size) for each reservation request.
Creation Date	The date and time that each reservation request was created.

Table 9-5 (Cont.) Reservation List Information

Column Name	This Column Indicates...
Phone Number	The guest's phone number.

Showing and Hiding the Reservation List

1. To view the reservation list, long-press on the Host Command area, and then select **Show Reservation List**.
2. To hide the reservation list, long-press on the Host Command area, and then select **Hide Reservation List**.

Sorting the Reservation and Wait Lists

1. Double-tap quickly on the Reservation List or the Wait List to open it.
2. Click the column headings with up or down arrows to sort the list.
 - When you sort the icon column in ascending order, the VIP records sort in order by Creation Date.
 - Each time you select the **Guest Name** header, the name toggles alphabetically by last name.
 - Each time you select the **Covers** header, the number of guests toggles between ascending and descending.

Adding a Reservation

1. Open the Reservation List using one of the following methods:
 - Double-tap quickly on the Reservation List.
 - Click the **New Reservation** button (if enabled).

When creating a reservation from an allocated reservation (double-tapping on a time slot), the application completes certain fields with information from the allocated reservation, including the date, time and covers. The new reservation inherits values from the selected reservation slot.

2. (Optional) Click the **Date** button to change the date. The date of the reservation request defaults to the highlighted date before opening the Reservation List.

On the Reservations calendar, select a different date, and then click **OK**. Click the arrows to move forward and backward between months.

3. Enter information about the guest on the Add Reservation Entry dialog, and then click **OK**.

You can enter data using either a keyboard or mouse that are physically attached to the workstation in which you are entering the request. Alternately, click the **Keyboard** button on the Add Reservation Entry dialog. The following table describes the fields and buttons.

Table 9-6 Add Reservation Entry Fields

Field or Button	Description
Name	Enter the First Name, Last Name, or both. The name appears on the reservation request and guest check.
Look Up (optional)	If the property is using a loyalty application, such as Oracle Hospitality Gift and Loyalty Advanced Cloud Service, you can look up and associate a guest's loyalty account with the reservation.
VIP (optional)	Select this option to indicate the guest is a VIP.
Cover Count	Enter the number of guests in the party that require seating. If you double-tap on a reservation and enter a smaller or larger cover count that is equal to the seating capacity in the list, the application assigns the reservation to a matching seating capacity with the cover count. For example, enter 6 covers for a 4-top at 8:00 p.m. The application assigns this reservation to the same time slot (8:00 p.m.), where the seating capacity and cover count are both 6. Next, enter 2 covers for a 4-top at 9:00 p.m. The application assigns the reservation to the same time slot (9:00 p.m.), where the seating capacity and cover count are both 2.
Phone Number (optional)	Enter the guest phone number to use in contacting the guest if questions arise regarding the reservation.
Requested Table (optional)	If the guest has a specific table request, select the table number. This does not guarantee the table for the guest, but increases the likelihood that the table will be available when the guest arrives for the reservation.
Time	Select the Time button to advance the reservation time using the Hour and Minute + or – buttons.
Availability (optional)	Select Availability to view a list of open reservation times (set by the property manager). Select the time you want to reserve.
Email (optional)	Enter the guest's e-mail address to send future promotions from the property.
Notes (optional)	Enter special information for the staff working on the day of the reservation (for example, birthday, anniversary, allergic to shellfish).
Revenue Center	If the property supports reservations across multiple revenue centers (for example, a resort or hotel), a selection list appears. This allows hosting staff in the dining room to make a reservation for the guest in another revenue center at the property. If you change the revenue center after selecting Availability, you must re-select the Availability button to determine the open reservation times in the new revenue center.

Table 9-6 (Cont.) Add Reservation Entry Fields

Field or Button	Description
Preferences (optional)	If the guest has a table preference (for example, smoking, patio, booth, or window), click the Edit button on the Add Reservation Entry dialog, and select the table preferences.
Referral (optional)	Enter referral sources, such as taxi services, hotel concierge, or advertisements.

4. In some cases where the request values do not match the application's allowable timeframes, the workstation prompts for reservation approval. If you have the **Enable Reservation Approval** permission, click **No** to save the request as unapproved, or click **Yes** to approve the reservation.

Unapproved reservations appear in the Reservation List. You can approve the reservation, cancel a reservation, or manually control the quickness of seating the request versus other approved requests.
5. After the reservation appears in the Reservation List, the application issues a confirmation number. The confirmation number appears in the summary area at the end of the Reservation List. Highlight the reservation request in the list to view details in the summary area.

Changing a Reservation

1. Double-tap quickly on the Reservation List to open it.
2. Open the reservation request using one of the following methods:
 - Double-tap quickly on the line with the reservation request.
 - Highlight the record, and then click the **Edit Reservations** button.
3. Change the appropriate information, and then click **OK**. The updated reservation request appears on the Reservation List.

If hosting staff can open and update the Reservation List requests on multiple workstations, the last record to be updated wins and reflects the changes.

Cancelling a Reservation

Ensure that you have the Cancel Reservation Entry privilege.

1. Double-tap quickly on the Reservation List to open it.
2. Long-press on the reservation request, and then select **Cancel Request**.
3. Select a reason code for the reservation cancellation (if prompted).

Setting the Reservation Summary

The summary area must be configured in order to view it in the Front of House.

1. Double-tap quickly on the Reservation List to open it.
2. Highlight a reservation request in the list. The summary area appears beneath the Reservation List and contains the following information about a reservation request.

Table 9-7 Summary Area Options

Summary Option	Shows
Cancel Date	If the reservation request was cancelled, this summary option shows the date and time the request was cancelled or set to a no-show.
Confirmation Number	The confirmation number associated with the reservation request.
Covers	The number of covers associated with the reservation request.
Creation Date	The date and time the request was created.
Greeted Date	The time the request was greeted by a hosting staff member.
Notes	Text that has been included in the notes field of the reservation request.
Phone Number	The phone number associated with the reservation request.
Referral Notes	Text included in the referral notes field of the reservation request.
Request Method	A description of the request method for the reservation (for example, phone ahead, Internet).
VIP	A VIP flag if the guest has VIP status.

3. To hide the summary area and prevent it from showing, long-press on a reservation request, and then select **Hide Summary Area**.
4. To show the summary area, long-press on a reservation request, and then select **Show Summary**.
5. To modify the summary area, long-press on a reservation request, and then select **Modify Summary Area**.
 - a. Select the appropriate summary options in the Select Items column.
 - b. To show the summary option on a separate line in the summary area, select the corresponding **Add New Line** check box. The text wraps when you deselect **Add New Line**.
 - c. Click **OK**.

Reservation List Icons

The following icons appear on the Reservation List.

Table 9-8 Reservation List Icons

Icon	Icon Name	Description
	Call Guest	Hosting staff paged the guest.
	Phone Reservation	The guest phoned to make the reservation, and hosting staff greeted the guest.

Table 9-8 (Cont.) Reservation List Icons

Icon	Icon Name	Description
	Phone Reservation (Ungreeted)	The guest phoned to make the reservation, but hosting staff has not greeted the guest.
	Internet Reservation	The guest made the reservation online, and hosting staff greeted the guest.
	Internet Reservation (Ungreeted)	The guest made the reservation online, but hosting staff has not greeted the guest.
	VIP	The reservation is for a VIP guest.
	Cancelled	The reservation has been cancelled.
	Unapproved Reservation	The reservation was made without approval.
	Abandoned	The guest abandoned or walked away from the reservation.
	No Show	The guests did not arrive and were not greeted.
	Table Preference	The wait or reservation record contains a request for a specific type of table.

Wait List

Often a guest arrives and asks for a table. When tables are not immediately available for seating, the guest may request a wait time and add their name to a Wait List. The Wait List contains all wait requests for the revenue center. The Wait List also shows reservations prior to the scheduled arrival. Reservations appear on the Wait List a configured number of minutes prior to the schedule seating time. Hosting staff with access to the Wait List can add, change, and abandon wait requests from this list. Hosting staff can manage the Wait List on its own page or as a popup in the host view.

The Wait List shows the following information in columns.

Table 9-9 Wait List Information

Column Name	Description
Abandoned Time	This column shows the date and time the guest abandoned the request from the Wait List.
Alert Icons	The icons indicate status or special considerations about the wait request or reservation.
Confirmation Number	This column shows the confirmation number issued to the reservation request

Table 9-9 (Cont.) Wait List Information

Column Name	Description
Covers	This column shows the number of people to be seated for the request.
Creation Date	This column shows the date and time that the request was created.
Greeted Date	This column shows the time when the host staff greeted the guest.
Guest Name	This column shows the name of the guest.
Pager Number	This column shows the pager number assigned to the guest when hosting staff greeted them.
Phone Number	This column shows the guest's phone number.
Request Method	This column shows the source of the reservation request (for example, phone ahead or Internet).
Time	The time is always enabled and shows the time that the guest is scheduled to be seated.
Wait Quote	This column shows the amount of time the hosting staff quoted to the guest upon arrival, or the amount of time a reservation had from the time that hosting staff greeted them to the time they are scheduled to be seated.

Showing and Hiding the Wait List

1. To view the wait list, long-press on the Host Command area, and then select **Show Wait List**.
2. To hide the wait list, long-press on the Host Command area, and then select **Hide Wait List**.

Adding a Wait List Request

To determine the current wait time for the guest, you need to know the cover count for the party. When you have this information, perform the following steps:

1. Open the Wait List using one of the following methods:
 - Double-tap quickly on the Wait List.
 - Click the **Add Wait List** button.
2. Enter information about the guest on the Add Wait List Entry dialog, and then click **OK**. The following table describes the fields and buttons.

You can enter data using either a keyboard or mouse that are physically attached to the workstation in which you are entering the request. Alternately, click the **Keyboard** button on the Add Wait List Entry dialog.

Table 9-10 Add Wait List Entry Fields

Field or Button	Description
Cover Count	Enter the number of guests in the party.
Wait Quote	The Wait Quote field automatically updates with the estimated quote time. The estimated quote time is the amount of time before the application expects a table to be available that can accommodate the covers entered. The application automatically calculates wait quotes after you enter the request. Quotes are based on availability, guest preferences (if any), and calculated turn times. You can provide this quote time to the guest. - Click the Wait Quote button to override the quote value set by the application. - Select the quote time from the list, or use the + and – buttons to increase and decrease the wait quote time.
Cancel	If the guest does not want to wait for a table, click the Cancel button.
Name	Enter the First Name, Last Name, or both. The name appears on the request and guest check.
Look Up (optional)	If the property is using a loyalty application, (such as Oracle Hospitality Gift and Loyalty Advanced) you can look up and associate a guest's loyalty account with the request.
VIP (optional)	Select this option to indicate the guest is a VIP.
Cover Count	Enter the number of guests in the party that require seating.
Phone Number (optional)	Enter the guest phone number to use in contacting the guest if questions arise regarding the request.
Requested Table (optional)	If the guest has a specific table request, select the table number, and then click OK . This does not guarantee the table for the guest, but increases the likelihood that the table will be available when the guest is seated.
Email (optional)	If the guest provides an e-mail address, they may receive future promotions from the property.
Notes (optional)	Enter special information for the staff (for example, birthday, anniversary, allergic to shellfish).

Table 9-10 (Cont.) Add Wait List Entry Fields

Field or Button	Description
Revenue Center	If the property supports reservations across multiple revenue centers (resort or hotel), a selection list appears. This allows hosting staff in the dining room to make a request for the guest in another revenue center at the property. If you change the revenue center after selecting a wait quote, you must re-select the Wait Quote button to determine the open seating times in the new revenue center.
Preferences (optional)	If the guest has a table preference (for example, smoking, patio, booth, or window), click the Edit button on the Add Wait List Entry dialog, and then select the table preferences.
Referral (optional)	Enter referral sources, such as taxi services, hotel concierge, or advertisements.

After creating a request, a Wait List chit prints (if configured). The chit contains information about the table request (such as guest name, revenue center, party size, greeted time, and estimated wait quote time).

Changing a Wait List Request

1. Double-tap quickly on the Wait List to open it.
2. Open the request using one of the following methods:
 - Double-tap quickly on the line with the request.
 - Highlight the record, and then click the **Edit Wait List** button.
3. Change the appropriate information, and then click **OK**. The updated request appears on the Wait List.

If hosting staff can open and update the Wait List requests on multiple workstations, the last record to be updated wins and reflects the changes.

Abandoning a Wait List Request

You must have the Wait List Entry privilege to use the Abandon Request function.

If the guest changes their mind and decides they want to cancel their request before the wait time expires, you can mark the Wait List request as Abandoned. Requests that remain on the Wait List beyond the configured number of minutes are considered abandoned, and the application automatically removes them from the Wait List.

1. Double-tap quickly on the Wait List to open it.
2. Long-press on the request, and then select **Abandon Request**.
3. Select a reason code for the guest's departure (if prompted).

Setting the Wait List Summary

The summary area must be configured in order to view it in the Front of House.

1. Double-click (or tap) quickly on the Wait List to open it.
2. Highlight a request in the list. The summary area appears beneath the Wait List and contains the following information about a request.

Table 9-11 Summary Area Options

Summary Option	Shows
Abandoned Time	If the guest leaves before being seated, this summary option shows the date and time the request was abandoned.
Confirmation Number	The confirmation number associated with a reservation request.
Covers	The number of people to be seated for the request.
Creation Date	The date and time the request was created.
Estimated Wait Time	The estimated amount of time remaining until the application anticipates the request being seated.
Greeted Date	The time the request was greeted by a hosting staff member.
Pager Number	The pager number assigned to the guest when hosting staff greeted them.
Phone Number	The guest's phone number.
Referral Notes	Text included in the referral notes field of the request.
Request Method	A description of the request method (for example, phone ahead, Internet).
VIP	A VIP flag if the guest has VIP status.
Wait Quote	The amount of time the hosting staff quoted to the guest upon arrival, or the amount of time a reservation had from the time they were greeted to the time they are scheduled to be seated.

3. To hide the summary area and prevent it from showing, long-press on a request, and then select **Hide Summary Area**.
4. To show the summary area, long-press on a request, and then select **Show Summary**.
5. To modify the summary area, long-press on a request, and then select **Modify Summary Area**.
 - a. Select the appropriate summary options in the Select Items column.
 - b. To show the summary on a separate line in the summary area, select the corresponding **Add New Line** check box. The text wraps when you deselect **Add New Line**.
 - c. Click **OK**.

Wait List Icons

The following icons appear on the Wait List.

Table 9-12 Wait List Icons

Icon	Icon Name	Description
	Call Guest	Hosting staff paged the guest.
	Phone Reservation	The guest phoned to make the reservation, and hosting staff greeted the guest.
	Phone Reservation (Ungreeted)	The guest phoned to make the reservation, but hosting staff has not greeted the guest.
	Internet Reservation	The guest made the reservation online, and hosting staff greeted the guest.
	Internet Reservation (Ungreeted)	The guest made the reservation online, but hosting staff has not greeted the guest.
	VIP	The reservation is for a VIP guest.
	Reservations	The reservation was generated from the Reservation List (not from the Wait List).
	Wait Quote Threshold Exceeded	The amount of time the hosting staff quoted to the guest has elapsed. The request is overdue for seating.
	Table Ready	The table is now ready to seat the request.
	Table Preference	The wait or reservation record contains a request for a specific type of table.

Employee Section Assignment Report

The Employee Section Assignment Report provides the employee section assignments for a revenue center in the Table Management System (TMS). The report contains the information listed in the following table:

Table 9-13 Employee Section Assignment Report Information

Report Information	Description
Report Name	Employee Section Assignment Report
Property Name	The name of the property in which the report is being run.

Table 9-13 (Cont.) Employee Section Assignment Report Information

Report Information	Description
User Name	The employee running the report.
Date and Time	The date and time the report was run.
Revenue Center	The name of the revenue center. Only revenue centers that have a section with associated tables appear.
Section	The name of the section. Only sections that have associated tables appear.
Employee	The Check Name of the employee that is assigned to a table associated with the section. If multiple employees are assigned to tables within the section, a new line appears for each employee.
Tables	The table names associated with the section. If multiple tables are assigned to a section, a comma separates each table name. If more tables are assigned to a section than can fit within the available report width, the report wraps the information to the next line without repeating the Table label on additional lines.

Table Management System Gestures

Gestures simulate actions that you can perform with a mouse click on a touchscreen device. The following table lists the gestures you can use in Symphony.

Table 9-14 Gestures

Gesture	Description
Simple Click	The Simple Click touchscreen operation is the standard way of interacting with the POS client. When you click an item on the screen (for example, a Screen Lookup (SLU), menu item, or tender), Symphony responds by activating the object.
Multi Select	The Multi Select touchscreen operation allows you to select several objects at once. For example, when you use the Table Management System (TMS) in Host Mode, you can select multiple dining table objects. After selecting the tables, you can perform a common action, such as Press and Hold or Drag.

Table 9-14 (Cont.) Gestures

Gesture	Description
Double-click	Use the double-click touchscreen operation with the Reservation and Wait Lists. When you double-click (or double-tap) the Reservation List or Wait List, a dialog appears for you to add a new entry. The Wait List toggles the selection of an item in the list in response to a Simple Click, but does not: • Perform an action to transition away from the screen • Change the application state (other than to toggle the item selection) You can also use double-click with another user interface (UI) element that does not immediately launch a task during a simple click.
Press and Hold	Use the Press and Hold touchscreen operation with the following TMS areas: • Wait List • Dining Tables • Host Command Area • Seating Section Layout When you press the touchscreen and release over the same object or list item, Symphony considers this to be a Press and Hold operation if the length of time between the press and the release is more than 1.5 seconds. You can use Press and Hold to show a pop-up dialog with context sensitive operations. For example, the Wait List shows a list of options to Greet Guest, Abandon Request, Hide Summary Area, and Modify Summary Area. The Press and Hold operation allows a large number of buttons to be kept off of the touchscreen, resulting in more screen space for the other UI objects. It also allows a specific command area to act as a launch point for miscellaneous commands that are not directly related to a specific UI element. An example of this is the Host Command area.
Swipe	Use the Swipe touchscreen operation with the Dining Table Status area. When you press the touchscreen and release over the same object with a distance of at least .5 inches, Symphony considers this to be a Swipe operation. The operation most commonly performed is to change to a next or previous item from a list. In the case of the Dining Table Status area, swiping changes to or from the next or previous dining table. If you perform a Swipe gesture too quickly on a touchscreen device, the driver may not be able to detect the movement.

Table 9-14 (Cont.) Gestures

Gesture	Description
Drag	Use the Drag touchscreen operation with Dining Table objects in TMS to merge one or more tables. Pressing the touchscreen in one area and releasing over a different object is considered to be a Drag operation to Symphony. Dragging a dining table object to another dining table object allows the first object to be added as a child of the second object. You can also Drag various TMS UI areas to different locations on the screen. Using your fingers, press the title area of the TMS UI area and drag it to a different part of the screen. You can move the following TMS items: • Wait List Area • Reservations Area • Section Layout Area • Dining Table Status Area • Host Command Area
Edge Scrolling	Use the Edge Scrolling touchscreen operation to scroll through a list of items without a scroll area. This allows more space for other UI elements. When you press and hold a location at the top or bottom 10% of a list, the list begins to scroll. The scrolling is slow at first and increases speed the longer you press the auto-scroll area.

10

Events

An event is a group of transactions that occur within a specific date and time range in one or more revenue centers at a property. Examples of events include sporting events and games, banquets, weddings, and receptions. A property can track sales and inventory, particularly when multiple events occur in a single business day (for example, a baseball double header).

Event Status Bar

The event status bar allows you to view the event name when posting check sales. The event status bar is typically configured to appear in the upper or lower area of the POS client page.

Depending on the status bar configuration, you can see some or all of the following information in the event status bar for the workstation operator and the current check detail:

- Event name
- Event short code
- Actual start date and time of the event
- End date and time (If the event is set to automatically end, the end time appears with an asterisk, such as 25/06/2017 11:00pm*.)

Depending on the status bar configuration, you can view the information while signing on or off of a workstation, and in a transaction.

Starting and Ending an Event

You must have the privileges to manually start and end an event.

Events that are configured to automatically start or end will do so automatically at the preset date and time. No manual intervention is needed.

When a workstation is offline and has no connection to the Check and Posting Service (CAPS), events cannot start or end (automatically and manually).

1. Sign on to the workstation.
2. To manually start an event:
 - a. Click the function key to select an event.
 - b. Select the event to start, and then click **OK**.
3. To manually end an event:
 - a. Click the function key to end an event.
 - b. Select the event to close, and then click **OK**.
 - c. Click **Yes** to confirm.
 - d. If the event has open checks, click **Yes** to close the event with open checks remaining, or click **No** to cancel the closing, pick up the open checks, and then close them.

A check can be associated with only one event. When you close an event with open checks, and then close the checks later, these checks post to the event they were associated with when opened.

Linked events are closed at the configured time, with or without open checks.

Posting Checks to an Open Event

1. Select the function key to begin a check or fast transaction.
2. If multiple events are active (started) in the revenue center, select the event, and then click **OK**.

When events are not set as mandatory, the POS client does not prompt you to select an event.

3. If prompted, enter the table number, and then click **OK**.
4. If multiple event areas are active for the event, select the area, and then click **OK**.
5. Add menu items, and then tender the check using the guest's payment method.

Posting Checks to a Closed Event

You can add a check to an event that is closed. For example, when you end a wedding event at the workstation, and then a wedding guest orders a last minute drink, you can post that check to the closed wedding event.

You must have the privilege to associate a check with an event that has ended.

1. Select the function key to begin a check or fast transaction. The Select Check Event list appears and includes closed events for the past seven days (including today).
Closed events appear in the list preceded by an asterisk (*).
2. If the event does not appear in the Select Check Event list (because it occurred more than seven days ago), select **Change date to show ended Events**, and then click **OK**.

You can view closed events for up to 60 days in the past (including today).

3. Select the date from the calendar, and then click **OK**. All closed events from the selected date to the current date appear.
4. Select the closed event, and then click **OK**.
5. Add menu items, and then tender the check using the guest's payment method.

Event Workstation Reports

The workstation property reports contain information about events. The following table lists the reports that contain event-related information.

Table 10-1 Event Property Reports

Report	Description
Property Financial Event Report	Shows events for each property for the period that you select, including total event and non-event sales, and outstanding (open) checks associated with events.

Table 10-1 (Cont.) Event Property Reports

Report	Description
Property Financial Event VAT Report	Shows Property Financial Event information, with the addition of value-added tax (VAT) detail.
Employee Financial Event Report	Shows events for the period and employee that you select, including total event and non-event sales.
Employee Financial Event VAT Report	Shows Employee Financial Event information, with the addition of value-added tax (VAT) detail.
Event Financial Report	Shows the event and period that you select, including total event and non-event sales.
Event Financial VAT Report	Shows Event Financial information, with the addition of value-added tax (VAT) detail.
Menu Item Sales Event Report	Shows menu items ordered during the period and event you select, including total event and non-event sales.
Employee Journal Report	Provides a journal of all sales transactions by a specific employee shown in a check detail layout. The information appears by revenue center and then by event.
Check Journal Report	Provides a journal of all sales transactions in a check detail layout. The information appears by revenue center and then by event.
Employee Open Check Report	Provides a list of all open checks belonging to an employee at the time the report is taken. Checks are grouped in the following order: employee, property or revenue center, and event. Event details appear in the check information.
Employee Closed Check Report	Provides a list of all checks that have been closed by an employee, including reopened checks that were closed again and checks closed as memo checks. In addition, special symbols on the report indicate whether the check was transferred, re-opened, split, or added. Checks are grouped in the following order: employee, property or revenue center, and event. Event details appear in the check information.
Offline Employee Open Check Report	Provides a list of all open checks belonging to an employee at the time the report is taken. Checks are grouped in the following order: employee, revenue center, and event. Event details appear in the check information. Unlike the online version of this report, the offline version functions only for a revenue center; it is not possible to take a report for the property.

Table 10-1 (Cont.) Event Property Reports

Report	Description
Employee Autofire Open Check Report	Provides a list of all checks that are scheduled for autofire at the time the report is run. Checks are grouped by employee, property or revenue center, and event, and sorted by scheduled date and time. Event details appear in the check information.

Rental Deposits

Deposits are advance payments made for scheduled events, such as banquets, parties, room rentals; or a security deposit on loaned items, such as bowling shoes.

Restrictions

- You can refund deposits only from the revenue center from which items were rented.
- The Check and Posting Service (CAPS) must be online to perform deposit-related functions.
- If a rental item is discounted, the discounted price is used for the Deposit Amount.
- Once a deposit is added to a check, you cannot void neither rental items nor their discounts.
- If the closed check containing the deposit is on an offline workstation, you cannot refund the deposit.

Applying a Deposit to a Check

1. Begin a check and add menu items.
2. If deposits are a service charge:
 - a. Select the menu item to which to apply the deposit, and then press the button corresponding to the Deposit Service Charge.
 - b. Enter the service charge amount, and then press **OK**.
3. If the workstation has separate buttons configured for rental menu items, press the button for the relevant rental item.
4. Press the **Apply Deposit** function key
5. In the Deposit Detail dialog, enter the deposit information, and then press **OK**.
The deposit details you entered appear in the check detail area.

Modifying Deposit Details on a Check

1. Pick up a check with a deposit.
2. Press the **Edit Deposit** function key, make the necessary changes in the Deposit Details dialog, and then press **OK**.

Removing a Deposit From a Check

1. Pick up the check with the deposit.
2. Select the deposit information on the check, and then press the **Void** function key.
3. Select the rental menu item or service charge, and then press the **Void** function key.
4. Perform either a service total or tender the check.

Viewing and Searching for Deposits

1. Press the **Show Deposit** function key to open the Select Deposit dialog.
2. To view a list of all deposits made, press **Search**.
3. Use the following filters to narrow the results, and then press **Search**:
 - **Deposit ID**: Enter the deposit number in the receipt.
 - **First Name**: Enter the customer's first name.
 - **Last Name**: Enter the customer's last name.
 - **Check #**: Enter the check number.
 - **Phone #**: Enter the customer's phone number.
 - **Description**: Enter any key words specified when creating the deposit.
 - **Custom Start**: Enter the start date to search for a deposit by a date range.
 - **Custom End**: Enter the end date to search for a deposit by a date range.

Refunding a Deposit

1. Press the **Show Deposit** function key.
2. In the Select Deposit dialog, search for and select the appropriate deposit record, and then press the **Refund** button.

You can search for deposits by:

- Deposit ID
 - Customer's first and last name
 - Check number
 - Phone number
 - Deposit description
 - Date range during which the deposit was created
3. Select a refund type, and then press **OK**.

The following refund types are supported:

 - Forfeited
 - Full Refund
 - Partial Refund
 - Refund Percentage
 4. If making a Partial Refund, enter the amount to return, and then press **OK**.

Note:

When a Partial Refund is applied, references to the deposit no longer appear on screen.

5. If making a Percentage Refund, enter the percentage to return, and then press **OK**.

6. To print a Deposit Report, in the Deposit Detail dialog press **Print**.
7. In the Deposit Detail dialog, press **Apply**, and then tender the check.

OPERA Guest Packages

Simphony allows users to query and view relevant information for a guest's hotel reservation packages. This information is derived from the OPERA Cloud Rest API and displayed on the Simphony workstation. The displayed guest package information includes a description of the package, the total and remaining allowance for the guest, how the package is allocated across all guests staying in a room, and other basic pieces of information.

Displaying OPERA Guest Packages Information

The following steps describe how a workstation operator can view and display OPERA Guest Package information.

1. On the workstation, click the **Display Opera Packages** button.
2. In the **Enter Room Number and Last Name** dialog window, enter the guest's room number and last name in their corresponding fields.
3. Click **OK**.
4. A new dialog window opens, displaying the reservations for the entered room number. Click the desired reservation.

 Note:

This window only appears if there is more than one guest assigned to the room number.

5. Another dialog window opens, displaying the reservation package(s) and basic information about the package(s). To view more information for a package, click the desired package.

13

Understanding Workstation Messages

The following topics explain messages that might appear on a workstation. Where appropriate, message descriptions provide corrective actions or usage notes.

Error Messages

The following table describes error messages you may encounter on a workstation:

Message	Description
Add check to itself not allowed	This message displays if you type the number of the current open check and press an [Add/Transfer] key. For example, if you opened or picked up check #1234 (or the equivalent table number) and then entered 1234 (or the equivalent table number) and pressed [Add/Transfer], you would be trying to add check #1234 to itself. Press [Clear] and enter the correct check identification.
AT entry not allowed with percentage service charge	This message displays if you use the [€/For] key with a percentage [Discount] key or a percentage [Service Charge] key. You may only use the [€/For] key with an amount [Discount] or [Service Charge].
Authorizing employee does not have authority	This message displays when authorization is required and the employee ID that is entered is for an employee not privileged to authorize the action. Press [Clear] and enter a privileged employee's ID number, or press [Clear] again to cancel the operation.
Authorizing employee is not in the correct employee group	This message displays when you attempt to access another employee's record and this employee is not in your employee group.
Auto service is already on	This message displays if you press an [Auto Service Charge] key when an auto service charge is programmed to automatically apply to all checks in this revenue center.
Bank amount entry required	This message displays if you attempt to begin a transaction without declaring an opening bank amount for your cash drawer. Press [Clear] to continue. Enter the opening bank amount with a [Media Loan] type tendering key. On your system, this key may be labelled [Opening Bank], [Declare Cash], etc.

Message	Description
Cannot add checks with different order types	This message displays if you attempt to add a check to another check with a different order type. For example, you cannot add a check with the order type TO GO to a check with the order type EAT IN. To proceed, change the order type of one check to match the other, then begin again.
Cannot split check with allocated discounts	This message displays if the [Split Check] key is used on a check which has a subtotal discount which is an allocated discount.
Cannot split item with modifiers	This message displays if a line has more than one of an item (for example, 3 Hamburgers), and the line has condiments (for example, Rare) and you attempt to void only 1 or 2 of this line item. If a line has consolidated menu items which have condiments, the menu items cannot be split. You must void the entire line, and post the menu items separately.
Cannot split open priced item	This message displays if a line has more than one of an open priced item (for example, 3 Open Food), and you attempt to void only 1 or 2 of these items. When a consolidated line is comprised of open priced menu items, you must void the entire line.
Cannot use with exemption	This message displays when you press a key other than a tendering key after using an [Exempt Tax] key or an [Exempt Auto Service Charge] key which requires a tendering key be pressed. Press a tendering key; or, void the exemption.
Check not found	This message displays if you attempt to pick up a guest check using the [Pick Up Check By Number] key and enter the number of a check that is not in the Open Check File. Either a check with that number is already closed or has never been opened.
Check number already exists	This message may display under two conditions: • If the system is programmed to allow you to assign check numbers and you enter the number of a currently open check and press the [Begin Check By Number] key. • If the system is programmed to assign check numbers, the check counter has exceeded the upper limit for that workstation, and the check numbers have cycled from the lower limit to the number of a currently open check.

Message	Description
Check pickup required	This message displays if you press a [Discount], [Service Charge], or [Tender/Media] key outside of a transaction. It also displays if you are not privileged to begin a fast transaction and you press a [Menu Item] key outside of a transaction. Press [Clear] to continue, and then begin a new check or pick-up an open guest check.
Choose an order pickup time after <date/time>.	This message displays when you need to enter a new pickup time as the current time has passed. The <date/time> is the current time + the service level time.
Condiment not allowed	This message displays if you attempt to add condiments to a menu item which is a member of a Menu Item Class which is not programmed to accept condiments.
Cover charge requires a preset amount service charge	This message displays if you attempt to enter either an open dollar amount Service Charge, or a percentage Service Charge, as a Cover Charge.
Discount is not allowed with the current order channel	This message displays when you attempt to apply a manual or coupon discount which is restricted to an order channel which does not match the guest check's order channel.
Discount is not allowed with the current order type	This message displays when you attempt to apply a manual or coupon discount which is restricted to an order type which does not match the guest check's order type.
Employee ID can not be found	This message displays if you enter either an Employee Number or Employee ID number, and the entry does not exist in the Employee module.
Employee inactive	This message displays if you enter the Employee Number of an employee whose Employee ID is zero.
Fast transaction cannot be service totaled	This message displays if you attempt to service total a fast transaction and your system is not programmed to allow this. You must tender and close the guest check on the system before beginning another transaction.
Final payment entry must be voided	This message displays if you attempt to modify a re-opened check which was closed with a final tender and change was due. You cannot modify the check until you void the tender using the line item void method.
Invalid SKU number	This message displays if the system is programmed to perform a Check Digit Verification on SKU entries and the entered number was incorrect.
Items with <tax rate name> tax cannot be shared	This message displays if you attempt to share an item associated with the Luxury or Add-On, Excludes Start Amount tax type among multiple seats or checks.

Message	Description
Last item void not allowed	This message displays if you partially tender a guest check to a Property Management System (PMS) (for example, through a room charge), then attempt to void the action. On completing the partial tender, the charge is automatically posted to the PMS computer, so a last item void is not allowed. To void an incorrect partial tender posted to a PMS, you must void it as if it had been entered in a previous service round.
Magnetic card is the wrong type	This message displays if you swipe a card through the magnetic card reader which is of the wrong type. For example, you receive this message if, during a tendering operation, you have swiped a magnetic card which is not a debit or credit card.
Not allowed with menu item on hold	This message displays if you are using the Hold and Fire function, and you attempt to split, memo tender, or transfer this check before firing. Press [Clear] to continue. Fire the order and begin again.
No cash drawer assigned	This message displays if you use the [No Sale] key to open a cash drawer and there is no cash drawer assigned to you.
No employee assigned to cash drawer at this workstation	This message displays if there is an attempt to use the [Unasgn Csh Drawr] key when there are no employees currently assigned to any cash drawer.
No items to repeat	This message displays if you press the [Repeat Round] key and no items from the previous service rounds are programmed to repeat. Menu items must be programmed to allow their use with the [Repeat Round] key.
No response	This message displays if a Property Management System (PMS) has not responded to the Symphony system within the time limit set in the Interface File. Press [Clear] to continue, and try again. If this problem recurs, it may be caused by a problem with PMS communications, or it may indicate that the entry in the PMS Timeout field in the Interface File must be increased.
No sales to apply service charge to	This message displays if a [Service Charge] key is pressed and either of the following two conditions are in effect: • No menu items have been posted which are programmed to add to the itemizers to which this service charge calculates. • The itemizers have been cleared by a previously applied service charge.

Message	Description
Non-Revenue Service Charge not allowed	This message displays if a [Service Charge] key is pressed and either of the following two conditions are in effect: • This message displays if you attempt to post a service charge which is programmed as a Non-Revenue Service Charge while in a transaction. The service charge must be posted inside a transaction. • This message displays if you are in the Training Mode and attempt any of several actions that are not allowed in Training Mode (for example, PMS posting, Credit Authorization, etc.).
Not allowed with closed check adjustment	This message displays if you attempt to make any changes to a closed check other than to change the tender type or the amount of the charged tip. You may adjust only the payment type or the amount of a charged tip with the [Adjust Closed Check] key. Other items on a closed check may be added, removed, or changed using the [Reopen Closed Check] key.
Not allowed with fast transaction	This message displays if you press an [Add/Xfer Check] key during a fast transaction. This message also displays if you press the [Split Check] key during a fast transaction printing a line-by-line customer receipt.
Not allowed with non-revenue service charge posting	Non-revenue service charges must be tendered immediately, and for the exact amount. This message displays if you attempt to add detail entries after posting a non-revenue service charge, or if you attempt to overtender the check.
Not allowed with Reopened Check	This message displays if you press an [Add/Xfer Check] key after reopening a closed check. A check cannot be added to a re-opened check.
Not allowed with Transaction Void	This message may display in response to any of several actions which are not allowed after pressing the [Transaction Void] button.
Number of guests entry required	This message displays if you are required to enter the number of guests each time you begin a check.
Out Of Menu Item	This message displays if you select a menu item which has been set to unavailable in the system. A manager or another privileged employee can change a menu item's status using a Property Management Console (PMC) procedure.
Quantity greater than 1 not allowed for items with <tax rate name> tax	This message displays if you finalize a transaction where a quantity greater than 1 for items with the Luxury or Add-On, Exclude Start Amount tax exists.

Message	Description
Return not allowed	This message displays if you press the [Return] key on an open check, and then attempt to return a detail entry other than a menu item, such as a discount, service charge, or tender.
Scale at zero	This message displays if the weight registered on an attached electronic scale is zero.
Scale calibration error	This message displays if the scale is not calibrated to zero.
Scale failure	This message may display if the workstation is not configured properly or if there is a malfunction with the scale itself.
Scale response timeout	This message displays if a weighed [Menu Item] key is pressed and the workstation is expecting a weight signal (from the attached electronic scale) which is not received.
Selected seat has no entries	This message displays if you enter a seat number (for example, while splitting a check), which has no menu items entered, and then you press the [Filter Seat] key.
Service Charge not found	This message displays if a number outside the range of service charge NLU numbers is entered when using a Service Charge NLU key. It also displays if a direct access service charge key is not correctly identified in the Discount/Service Charge File. The first case is usually simply an erroneous key strike. The second case is a programming error.
Service Charge that adds to guest count required	This message displays if your system is programmed to require a service charge which adds to the guest count for each check (this is usually a cover charge). Press the [Service Charge] key which adds to the guest count.
Service total of closed checks is not allowed	This message may display when you attempt to service total a check which you re-opened using the [Reopen Closed Check] key. You can only tender the transaction after you have made any modifications using this key.
Sign-in not allowed, revenue center not found	This message displays if the revenue center to which the employee is linked in the Employee module is not included in the list of revenue centers which this workstation can access. The revenue center number displayed is drawn from the RVC Configuration module.
Table already entered	This message displays if you are in a transaction with a check which already has a table number assigned and you attempt to use the [Table Number] key to assign a table number.
Table entry not found	This message displays when you attempt to begin, pick up, or transfer a check by table number and a table number is entered which is not listed in the revenue center's Tables module.

Message	Description
Tare weight is larger than item weight	This message displays if you enter a weight for a weighed menu item which is smaller than the tare weight (the weight of the empty packaging). Press [Clear] to continue. Enter the combined weight of the weighed menu item and its package.
Tender entry required	A revenue center may be programmed to require tendering in full after a partial tender. If you post a partial tender, and then attempt to do anything else but close this check, this message displays. You may void the partial tender which was just entered, or you may fully tender the check.
Tender/Media not found	This message displays if the number entered with a [Tender NLU] key is outside the range of Tender/Media key sequence numbers defined in the Tender/Media File. It also displays if a credit card number has not been defined with a [Credit Card] key or a [Credit Card Lookup] key before pressing the [Credit Card Recall] key.
These items have more than the allowed maximum of 8 inclusive tax rates. Adjust the configuration or transaction so 8 or fewer inclusive tax rates are active for the item.[menu item(s)]	This message displays if a taxable item has more than the supported maximum of 8 inclusive (non-VAT) taxes. The configuration must be adjusted or the transaction changed so eight or fewer inclusive (non-VAT) are active.
This operator is not allowed to begin a check	This message displays if you attempt to use the [Begin Check By Table] key or the [Begin Check By Number] key and you are not privileged to do so. Check with your manager to correct the situation.
Transaction cancel not allowed after charge posting	This message displays when you press the [Transaction Cancel] key when a Property Management System (PMS) posting has already taken place within this service round.
Transaction cancel not allowed after splitting	This message displays if you press the [Transaction Cancel] key after using the [Split Check] key. You may only service total, print, or tender a split check.
Transaction void not allowed after entries made this round	This message displays if you attempt to use the [Transaction Void] key after entries have been made in this round.
Valid serving period required to begin a transaction	This message displays if the following conditions are in effect: • The current Serving Period has expired. • Revenue Center programming requires a Serving Period to be active in order to post sales. • You attempt to begin a transaction. A privileged employee must change the active Serving Period.

Message	Description
Void check not allowed after entries made this round	This message displays if you press the [Void Check] key in a service round after you have already made an entry in this round. The [Void Check] key must be the first key pressed at the beginning of a service round.
Void not allowed after FOR entry	This message displays if you attempt to use the [*/For] key twice in voiding a detail entry. For example, entering [3] [*/For] [5] [*/For] [Void] will generate this message.
You are not assigned to a cash drawer at this workstation	This message displays when you have no cash drawer assigned to you, and you use the [Unasgn Csh Drawr] key.
You are already assigned to a cash drawer	This message displays when you already have a cash drawer assigned to you, and you use the [Asgn Csh Drawr] key.
You are not clocked in	This message displays if you attempt to sign in and you are required to clock in first. Clock in before you sign in.
You are not currently assigned to this Revenue Center	This message displays if you attempt to sign in on a workstation which is permanently assigned to a revenue center other than your own, or whose list of available revenue centers does not include yours.

SPI Messages

Message	Description
Acceptor Contact Acquirer, Security - Code 66 The transaction is declined.	Collect the card and contact the card acquirer's security department for further instructions.
Already Paid - Code 38 The transaction is declined.	Pay at Table - the check has already been paid in full.
Approved for Partial Amount - Code 10 The transaction is approved for a lesser amount.	The transaction is approved for a lesser amount than requested. Obtain additional payment for the remaining amount.
Approved, Update Track 3 - Code 16	N/A
Approved, VIP - Code 11 The transaction is approved.	This cardholder is identified as a VIP.
Bank Not Supported By Switch - Code 31 The transaction is declined.	The bank associated with the payment card account is not supported. Use a different payment.
Cannot Complete, Violation of the LAW - Code 93 The transaction is declined.	The requested transaction is illegal and can't be performed.

Message	Description
Capture Card - Code 67 The transaction is declined.	Collect the card.
Card Acceptor, Contact Acquirer, Retain Card - Code 35 The transaction is declined.	The card is not valid. Contact the acquirer and collect the card.
Check is Opened (by other workstation) - Code 26 The transaction is declined.	Pay at Table - the referenced check is open on another workstation. Close the check on the other workstation, then try again.
Contact Acquirer Security Department, Retain Card - Code 37 The transaction is declined.	Collect the card and contact the card acquirer's security department for further instructions.
Cutoff in Progress - Code 90 The transaction is declined.	The terminal is performing the day-end cutoff. Try again when the process is completed.
CVV Validation Error - Code 82 The transaction is declined.	The validation failed. Verify the information and try again.
Do Not Honor - Code 5 The transaction is declined.	Do not honor this card for payment and use a different payment.
Duplicate Transaction - Code 94 The transaction is declined.	The same transaction has already been performed.
Error - Code 6 The transaction is declined.	This is a generic error, no further detail is available.
Exceeds Withdrawal Limit - Code 61 The transaction is declined.	N/A
Expired Card - Code 54 The transaction is declined.	The payment card is expired. Use a different payment.
Expired Card, Capture - Code 33 The transaction is declined.	The payment card is expired. Collect the card.
Format Error - Code 30 The transaction is declined.	The message format is incorrect.
Function Not Permitted to Cardholder - Code 57 The transaction is declined.	The requested function is not permitted with this card. Use a different payment.
Function Not Permitted to Terminal - Code 58 The transaction is declined.	The requested function is not permitted on this payment device. Try on a different device.
Function Not Supported - Code 40 The transaction is declined.	The requested function is not supported with the payment support provider.
Host or Switch Unavailable The transaction is declined.	The terminal is unable to communicate with the host or switch.

Message	Description
Incorrect PIN - Code 55 The transaction is declined.	The entered PIN is incorrect. Try again.
Insufficient Funds - Code 51 The transaction is declined.	The account associated with this card does not have sufficient funds or credit to cover the transaction. Use a different payment.
Invalid Card Number - Code 14 The transaction is declined.	The card number is invalid. Re-enter or use a different card.
Invalid Transaction - Code 12 The transaction is declined.	This transaction type is not supported.
Invalid Transaction RVC ID or Merchant Mismatch - Code 97 The transaction is declined.	The payment device is registered to a different merchant than the Revenue Center is associated with. Correct the configuration and try again.
Lost Card - Code 41 The transaction is declined.	This card has been reported as lost. Use a different payment.
No Action Taken - Code 21 The transaction is declined.	The requested procedure was not executed. Try again.
No Card Record - Code 56 The transaction is declined.	N/A
No Check Account - Code 52 The transaction is declined.	N/A
No Credit Account - Code 39 The transaction is declined.	This card is not associated with a valid credit account. Use a different payment.
No Investment Account - Code 44 The transaction is declined.	N/A
No Issuer - Code 15 The transaction is declined.	The card is not associated with a valid issuer. Use a different payment.
No Merchant - Code 3 The transaction is declined.	The configured Merchant ID is invalid. Correct the configuration and try again.
No Open Check On This Table - Code 24 The transaction is declined.	Pay at Table - there are no open checks associated with the table number. Verify the information and try again.
No Privilege to Perform Refund - Code 29 The transaction is declined.	The signed in user does not have the privilege to perform a refund.
Pick Up Card - Code 4 The transaction is declined.	Collect the payment card, if possible.
Pick Up Card, Special - Code 7 The transaction is declined.	Collect the payment card, if possible.

Message	Description
PIN Tried Exceeded - Code 75 The transaction is declined.	The card holder has entered the wrong PIN too many times. Collect the card.
PIN Tries Exceeded, Capture - Code 38 The transaction is declined.	The card holder has entered the wrong PIN too many times. Collect the card.
POS Cancel - Code 0 The transaction is declined.	The transaction has been canceled from the POS.
Posting Failure - Code 45 The transaction is declined.	N/A
Read Card Error - Code 0 The transaction is declined.	The card could not be read. Try again or use a different payment.
Re-enter Last Transaction - Code 19 The transaction is declined.	The last transaction failed. Try Again.
Refer to Issuer - Code 1 The transaction is declined.	Contact the card issuer for more information.
Refer to Issuer, Special -Code 2 The transaction is declined.	Contact the card issuer for more information.
Request in Progress - Code 9 The transaction is declined.	Another request is being processed. Try again.
Restricted Card - Code 62 The transaction is declined.	The card has been restricted. Use a different payment.
Restricted Card, Retain Card - Code 36 The transaction is declined.	The card has been restricted. Collect the card.
Stolen Card - Code 43 The transaction is declined.	This card has been reported as stolen. Use a different payment.
Suspected Fraud - Code 59 The transaction is declined.	Fraud is suspected with this card account. Use a different payment.
Suspected Fraud, Retain Card - Code 34 The transaction is declined.	Fraud is suspected with this card account. Collect the card.
Suspected Malfunction - Code 22 The transaction is declined.	A technical error occurred and the transaction was not completed. Retry.
System Error - Code 96 The transaction is declined.	A technical error occurred and the transaction was not completed. Retry.
Transaction Approved - Code 0 N/A	Message is never displayed.

Message	Description
Unable to Locate Record on File - Code 25 The transaction is declined.	This error occurs when a transaction such as incremental authorization, finalization, void, or refund is referencing a previous transaction that can't be found or is otherwise not valid. Verify the information and try again.
Unacceptable Transaction Fee - Code 23 The transaction is declined.	N/A
User Cancel - Code 0 The transaction is declined.	The user has canceled the transaction from the payment device.
User Not Found - Code 18 The transaction is declined.	The configured user for this driver is invalid.
User Not Login Yet - Code 27 The transaction is declined.	Pay at Table - the user must log in first.
User Response Timed Out - Code 0 The transaction is declined.	The card holder didn't respond to the terminal prompt within the allocated time. Retry.