



# **SMP 7750/7900/9500**

## **In Store Technology User Guide**

**KTEC**

Manual Version 3.8 – 10/2008



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# Module One - Hardware

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## Module One Objectives

Upon completion of this module, you will be familiar with the:

- Desktop Computer (back office computer)
- Monitor
- Netgear Switch
- Plugs and Cables
- PowerVar
- Local Area Network (LAN)

## In Store Technology – Overview

What is all this stuff? In-Store Technology can be defined as the tools we use to collect, save and distribute information. The tools consist of hardware (such as a computer workstation or mouse) and software (like a computer program or application.) The hardware in our stores includes the Point of Sale (POS) registers and our Manager Workstation (SMP) computer system. The software we use is comprised of several different programs, all of which are designed to make your lives much easier by organizing information in a way that allows you to effectively manage your store.

### Data, Information and Reports

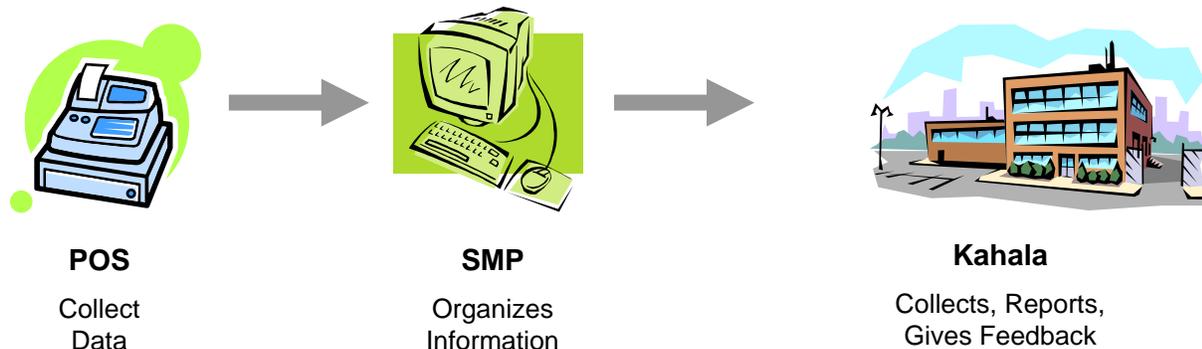
Let's think about data as random pieces of information. **Data** can exist as numbers, text, or graphics. Some examples of data on the POS include: a waffle cone, a crew member's name, the exact time your crew member clocked in or the dollar amount tendered at the register. Your POS register collects data and organizes it to make it more practical.

**Information** is data that has been organized in a specific way. Some examples of information include: the number of waffle cones you sold during the day, how many crew members are clocked in, or the amount of your sales totals. Your POS can produce this information in the form of simple reports.

A **report** is simply information that has been organized in a way that is most useful to you. You can print several reports directly from your POS register that classify your sales, transactions, and labor information. Your SMP can display, save and print many more reports—often with even more information.

### Sales Information Flow

All locations have at least one POS terminal and SMP back office software that is either loaded onto a PC or onto a register. Data is collected at the register in the form of a transaction. Transaction data flows into a data collection file (database) in your SMP. SMP has several programs that assemble the data as information.



## PC and Peripherals

This section describes the basic hardware components. It is important to be familiar with your hardware in the event that you need to discuss an issue with support.

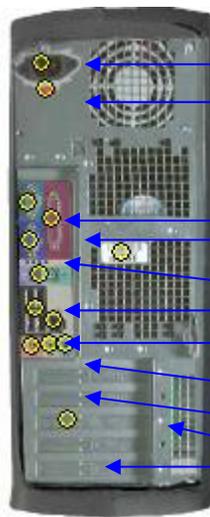


The system will come with a Dell PC\*, 15" flat screen monitor, standard keyboard and mouse.

*\*PC type will vary by store.*



CDRW Drive  
Extra Bay  
Floppy Drive  
Extra Bay  
Power Button



AC Power In  
Voltage Switch  
Serial Port  
Parallel Port  
Integrated Graphics  
P2 Ports – Mouse and Keyboard  
USB Ports  
Onboard Ethernet (SMP LAN)  
Modem  
Additional Ethernet (Internet LAN)



Power Button - When the monitor is on, the light above the power button will be green. If the light is orange, that indicates that either the PC is turned off or the connection between the monitor and the PC has been terminated.





Your computer can be damaged by power disturbances in three different ways. Destruction, which is the most visible because it is usually accompanied by charred components and immediate system failure. Lower magnitude power disturbances do not cause outright failure. Instead they degrade system components—weakening them a little at a time much like rust attacks metal. Usually the damage is not visible until the component fails and then it's too late. The lowest magnitude of power disturbances are those that interfere with the computer's ability to make proper logic decisions. These disturbances are associated with normal mode noise and common-mode voltage. These disruptive disturbances are responsible for most of the unexplainable failures that happen from time to time. Disruptive power disturbances are known to cause system lock-ups, lost files, communication errors and “no trouble found” service calls.



#### Connectivity Lights –

These lights will be green if the network is functioning properly.

It is important to be aware of your environment. You should know where your cables are connected and where they connect to the PC, Switch and Registers.

PowerVars\* must be used at each register and the PC to prevent these disturbances.

*\*Some stores may have a Tripp Lite unit instead of a PowerVar*

## Local Area Network (LAN)

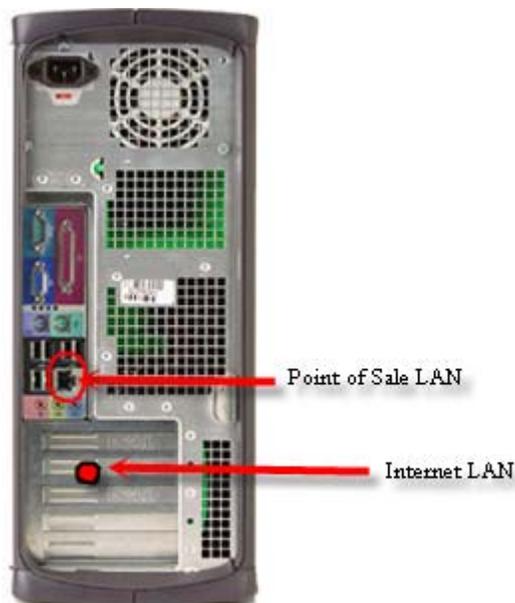
A LAN is a local computer network for communication between computers; especially a network connecting computers and other electronic office equipment to create a communication system.

### Point of Sale LAN

The Point of Sale LAN is responsible for communication between the register and the back office computer.

### Internet LAN

The Internet LAN allows you to use a high speed internet connection.



*If you have a high speed connection, be sure to connect to the **Internet LAN port**. If you connect to the wrong port (POS LAN), communication between the register and computer will be lost.*

## Using an Internet Service Provider

Your internet connection is your primary method for networked communication and sales reporting to Kahala. All new stores are required to have a broadband (high-speed) connection to the internet. Store owners have the option of using their own local broadband provider for access. If broadband service is not yet available in your region, connecting to a local dial-up account to access the Internet with your modem is sufficient.

## Using a Dial-up Account

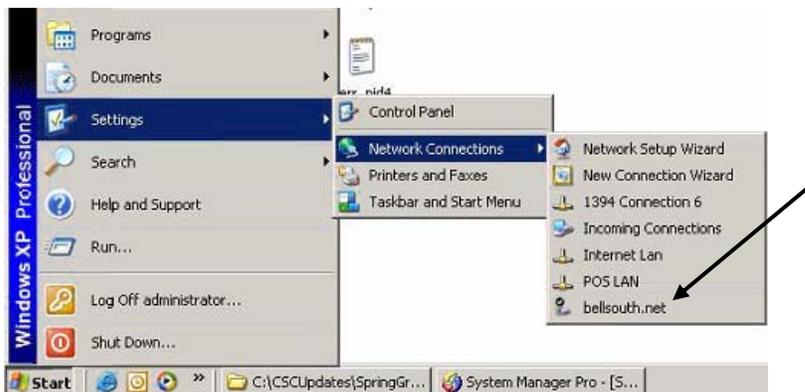
Using an ISP dial up account requires the installation of a second phone line to your store that can be used by the computer to access the Internet and send email. During the installation and setup of your SMP computer system, you should check to see that the dial-up number you have chosen for a local connection will NOT incur additional expense because of a toll charge to your phone bill.

Even access numbers in your area code may result in toll, usage, or long distance charges. Please check with your local phone company to determine whether additional charges apply. You are responsible for selecting the best number for you and for all telephone fees and charges associated with the use of the telephone number you select. It is important to check this number on the dial up configuration setting prior to your store opening; otherwise you will be responsible for unnecessary long distance phone bills that could easily be avoided.

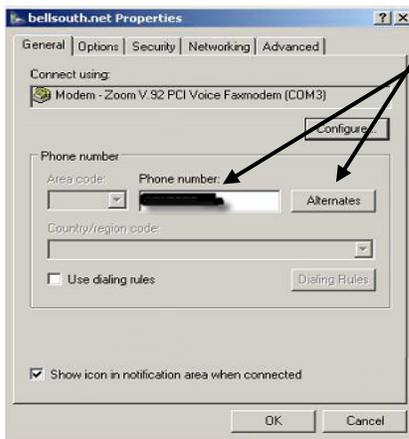
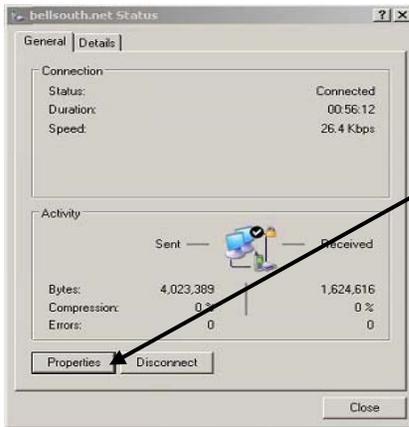
## Checking your dial up connection

Prior to the opening the store, but after phone service has been established, please verify that the modem number is a non-toll number. This can be done by identifying the modem number and calling the phone company to verify. To find the modem number, please follow these steps at the back-office PC:

- 1 From your Windows Desktop, Click: Start > Settings > Network Connections  
The dial up provider should be listed; i.e. BellSouth, Qwest, etc. Select the dial up provider.



## Checking your dial up connection (cont)



- 2 Click **Properties** button to display **number**. Verify with the phone company that the number is a non-toll number.
- 3 Verify that there are no alternate numbers that can be dialed by clicking the **Alternates** button.
- 4 If there are other numbers listed in the alternate box, please verify with the local phone company that the numbers are non-toll numbers.



# Module Two - Preinstalled Software

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## Module Two Objectives

Upon completion of this module, you will be familiar with:

- Logmein
- Norton SystemWorks
- Microsoft Office
- Adobe Acrobat



## Security

Security for SMP should always be a primary concern for an owner or manager. To protect the integrity of your financial reporting investment, you should make it a policy to offer only limited access to the PC or register that SMP is installed on. The two main reasons we want to limit access are:

- **Internet cruising** can be a distraction for crew members but also can be a gateway for harmful programs to be downloaded to your system without your knowledge. This is more than a major headache, it's a business liability.
- **Viruses** are most common in e-mail and usually prompt the user to click on an attachment before they do any harm. One wrong click on a malicious program can ruin 2-3 days of operational data and potentially wipe out a year's worth of historical data. Take some time to educate yourself regarding virus detection and prevention.

Using password protection is your best defense against malicious content and abuse. Every PC or register with SMP loaded on it comes with basic password protection that grants limited access to crew members (no Internet privileges) and full access for managers.

A new PC is set up with the following 5 Users before it is shipped:

**Administrator** – for store owner use, password may be changed.

**DoNotTouch** – used to run technical support services. Do not change the password.

### Store Manager

User Name: **storemgr**, Password: **storemgr**

- Has full access to installed programs, the Internet, SMP programming

### Shift Manager

User Name: **shiftmgr**, Password: **shiftmgr**

- Has full access to installed programs, the Internet, SMP with further limitations in programming and reporting

### Crew

User Name: **crew**, Password: **crew**

- Can run End of Day, Can run cashier reports for crew



***Using password protection to control access is your best defense against malicious content, abuse and Internet cruising.***

## Logmein

Logmein is software used for remote (offsite) support. This software gives the POS Technology team and the Help Desk access to your computer. Logmein can also be used by you to access your PC or register from home.

The Logmein application is depicted by a white box with four blue circles. Hover your mouse over Logmein to see if it is enabled or disabled. If Logmein is disabled, right click with your mouse and choose Enable Logmein.



Enabled



Disabled

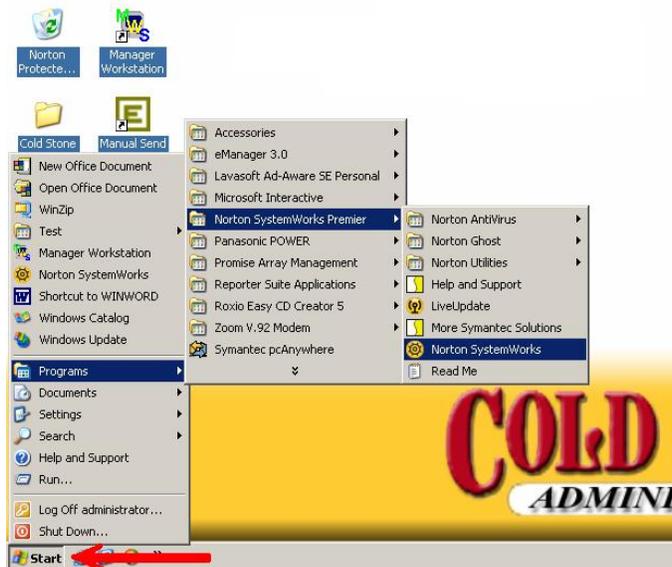
# Norton SystemWorks

Norton SystemWorks protects the computer from threats, and such viruses as; Trojan horse, malicious code, privacy and intrusion threats. New threats are found daily. Symantec provides updates on a subscription basis and protects the PC or register from new threats. Having a current subscription to those updates helps keep the computer safe.

Running LiveUpdate is the easiest way to get security updates. LiveUpdate checks to see if your subscription is current before getting any subscription based updates. If your subscription is not current, the virus definitions will not update. Subscriptions must be renewed every 12 months.

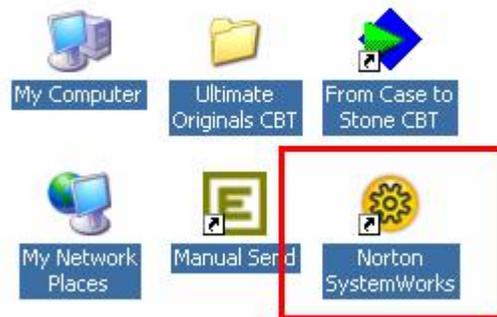
There are 2 ways to open **Norton**:

- 1 Click **Start > Programs > Norton SystemWorks Premier > Norton SystemWorks**

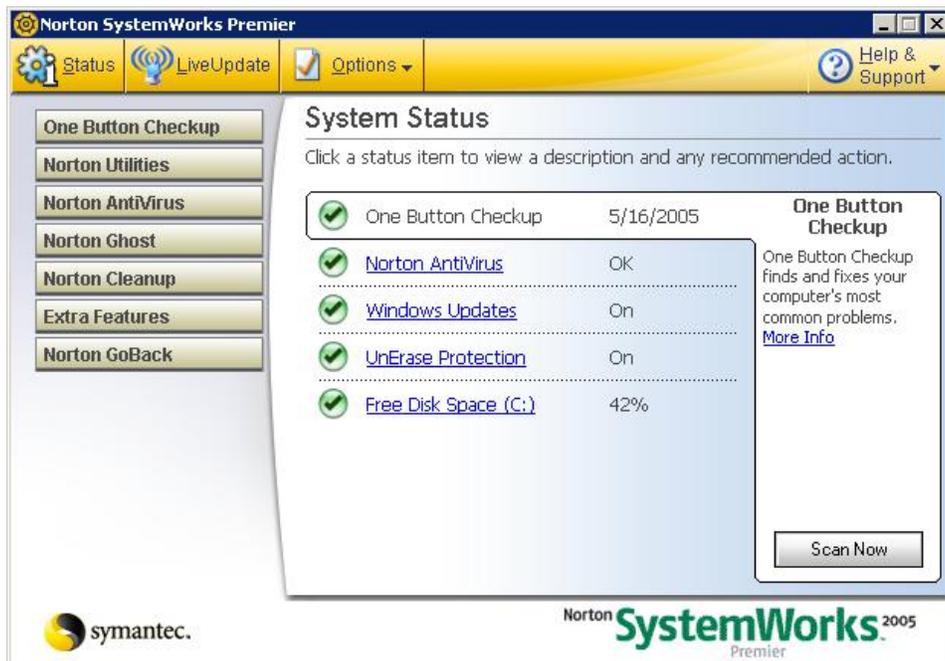


OR

- 2 Double-click the shortcut on the desktop



The application will open and look like the screen below:



Norton SystemWorks opens to the home page, giving you access to:

- LiveUpdate
- One Button Checkup
- Navigation buttons for additional system utilities

## **LiveUpdate**

LiveUpdate allows Norton SystemWorks to be updated and should be done once or twice a week. This process should be set up to run automatically. If there is no connection to the Internet (you have to dial up), the update cannot be run automatically and needs to be done manually. During high virus alerts, this should be run daily.

## **One Button Checkup**

### **Norton Utilities**

Norton Utilities is an integrated suite of programs that can help find and fix computer problems, improve a computer's performance, perform preventative maintenance tasks and troubleshoot the system. It is your responsibility to maintain your computer.

#### Optimize Performance

- Speed Disc – Improves system performance by reorganizing the contents of the disk so that the files are stored in adjacent clusters, improving the chances of recovering erased files.

#### Find and Fix Problems

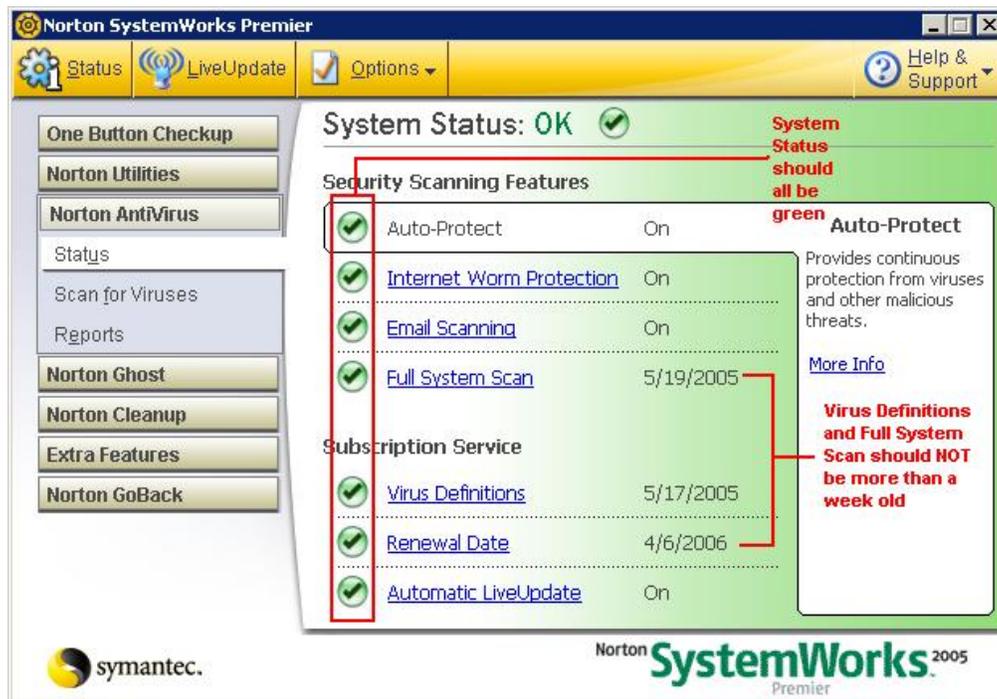
- Norton SystemDoctor – Monitors and analyzes various parts of the computer, including disk and CPU usage, disk integrity, system integrity, network throughput and Internet site access time.
- UnErase Wizard – Locates and recovers files that are protected by Norton Protection or the Windows Recycle Bin.
- Norton DiskDoctor – Performs a series of surface analysis tests to ensure the integrity of the disks and repairs problems.
- Norton WinDoctor – Performs a series of tests to diagnose and fix most Windows problems.

#### System Maintenance

- System Info – Reports on common device information as well as hard-to-find details about the computer, including memory, logical and physical characteristics of disks and partitions, network connections and Internet connection.
- Wipe Info – Permanently removes unwanted files so that they never can be recovered by a file recovery program. It can also wipe the free space on the hard disk, ensuring that previously deleted information is not left on the hard disk.

## Norton Antivirus

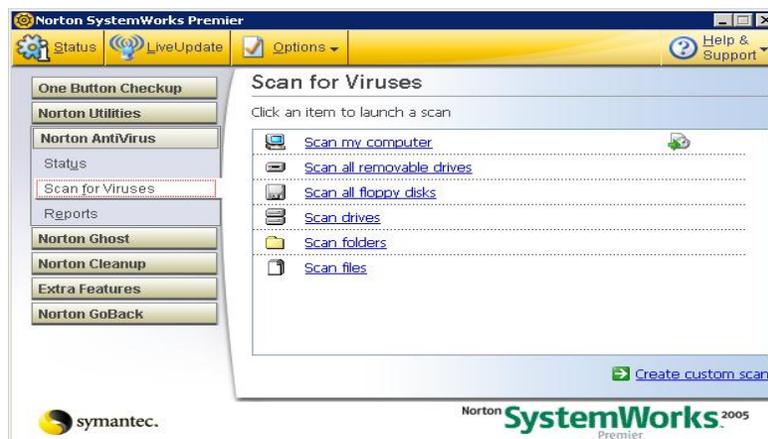
Norton Antivirus scans and fixes your computer for viruses. This function is not included in the One Button Checkup and should be done weekly in addition to the One Button Checkup.



The date the subscription will expire is listed and should be renewed prior to expiration.

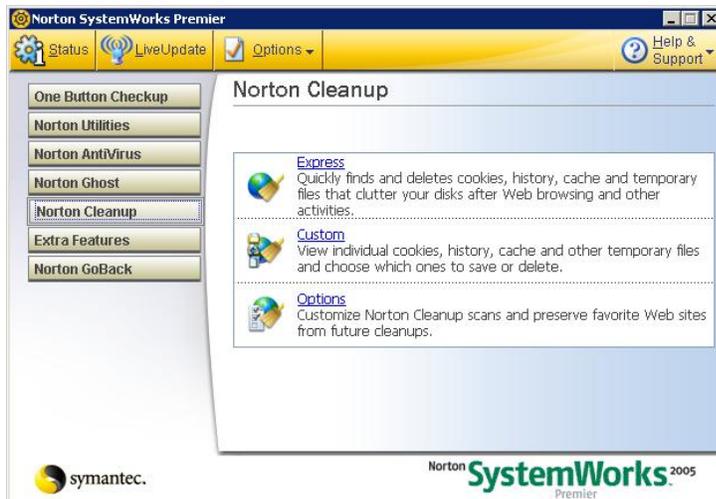


To run a manual Full System Virus scan click **Scan My Computer**.



## Norton CleanSweep

Norton CleanSweep minimizes hard disk clutter and creates more disk space, which can provide better performance.



### Clean Up

- Uninstall Wizard
- Fast and Safe Cleanup

### Internet

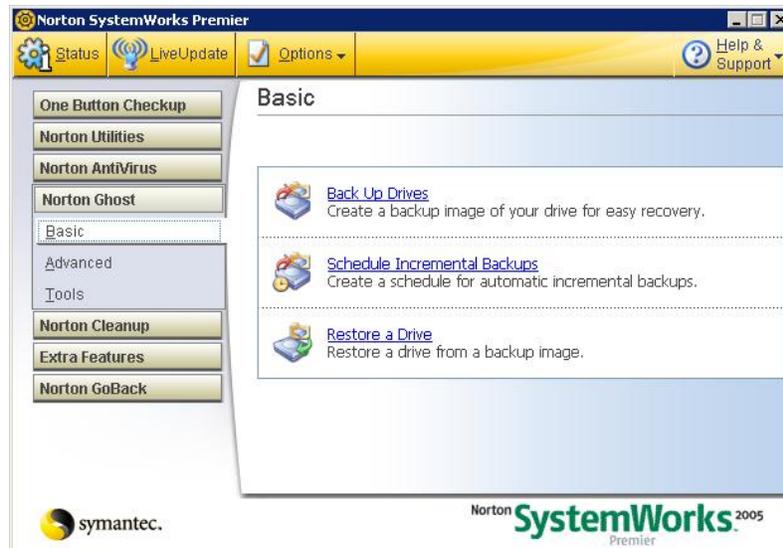
- Internet Uninstall
- Internet Cache Cleanup
- Cookie Cleanup
- Plug-in Cleanup
- ActiveX Cleanup

### Programs

- Backup Wizard
- Restore Wizard

## Norton Ghost

Norton Ghost provides the ability to clone one partition or hard disk to another, creating an exact copy of the original. It has the capability to perform a full system backup and restore of the computer.



### Ghost Basics

- Backup
- Restore
- View Log

### Ghost Advanced

- Clone
- Run Ghost Interactively
- Peer-to-Peer
- Create Virtual Partition
- Image Integrity Check

### Ghost Utilities

- Norton Ghost Boot Wizard
- Norton Ghost Explorer
- Norton Ghost User's Guide

## Ordering a subscription renewal online

The steps below walk you through purchasing a subscription renewal on the Symantec Web site. There are two parts to placing a subscription order online. The first is to place the order, and the second is to read your email confirmation and enter the subscription key to activate the subscription.

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**Note:** This is one of two ways you can purchase a subscription renewal. You can also renew the subscription by running LiveUpdate on the computer that needs the subscription renewed.

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### To place a subscription order

Go to the Symantec Renewal Center

([http://www.symantec.com/techsupp/subscribe/sub\\_purchase.html](http://www.symantec.com/techsupp/subscribe/sub_purchase.html)).

- 1 Select your product and version, Click **Continue**.
- 2 Select your country and language. Click **"Go!"**
- 3 On the "Select 1 Year Renewal" page, click **"Renew!"**
- 4 On the "Review your order and select how you want to pay" Web page, click the drop down menu to pick your payment method. Wait for the page to refresh. If you chose a payment method that adds a processing fee, you will now see that added to the total price. Click **"Continue."**
- 5 On the "Check if you have a Symantec online account" page, type in your email address.
- 6 Click **"Check for Account."**
  - If your account is found, type in your password and go on to step 7.
  - If your account is *not* found, fill out the form to create an account and then go to step 7.
- 7 On the "billing information" page:
  - Double-check your payment method.
  - Type in your billing information.
  - Give your computer a nickname. The nicknames will help you keep track of your subscriptions if you have more than one computer.
  - Click **"Continue."**
- 8 If you are paying with a credit card, type in the account information and click **"Continue."** Go on to step 9. If you are using another payment method, skip to step 10.
- 9 On the "confirm your order" Web page make sure all of the information is correct. Click **"Continue"** or **"Submit Order."**
- 10 What you see and do next depends on your payment method.
  - **If you are paying by check**, follow the 5 steps listed on the Web page to send in your payment. Your subscription key will be sent to you when payment is received.

- **If you are paying by phone**, call the number that is listed on the Web page to make your payment.
- **If you are paying by credit card**, check your email for your confirmation email. The email will have the subscription key that activates your subscription. Go on to the section below titled "To complete the subscription process" for help entering the key into the program.

### To complete the subscription process

Symantec sends an order confirmation that includes the subscription key. You need this key to reactivate the subscription for your program.

### To enter your subscription key

- 1 Print this document by clicking the "print this document" link at the top of the page.

If you do not have a printer, then leave this window open while you enter the subscription key or write the steps down. If you leave this window open, do not use the Back button or click any links until the Internet connection is turned back on.

- 2 Disconnect from the Internet. If you have a cable or DSL connection, you may need to disconnect the Ethernet cable from the back of the computer.

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**Note:** If you do not disconnect from the Internet before continuing to step 3, then the correct windows for renewal will not appear. For information about why you need to disconnect from the Internet for this to work, read the Technical Information section in the document printed from the website.

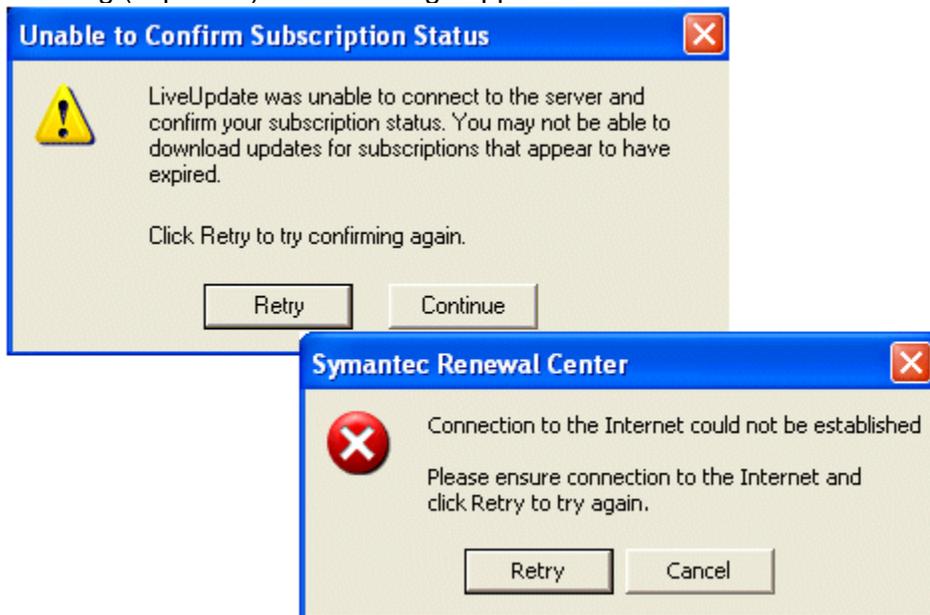
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- 3 Open your Norton Symantec product.

Click the LiveUpdate button at the top of the window.

- 4 On the "Welcome to LiveUpdate" window, click Next.

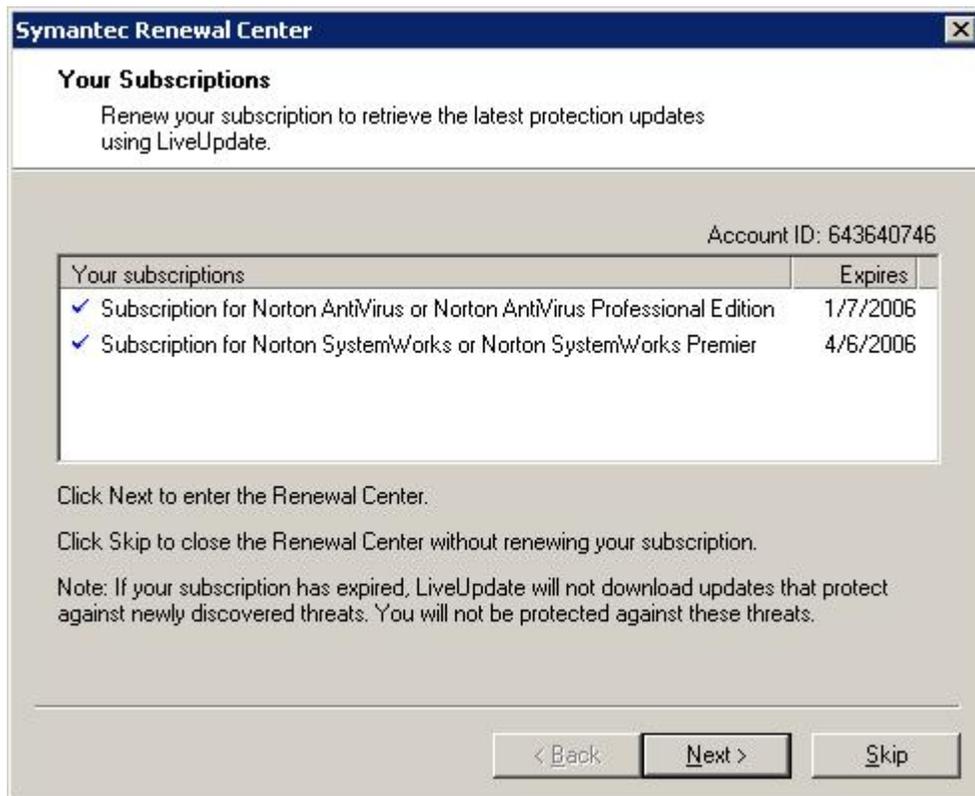
A confirming subscription status window appears, and then quickly disappears. One of the following (expected) error message appears:



- 5 On the error message, click Cancel or Continue. These error messages are expected, and will not prevent you from renewing your subscription.

In the "Subscription Services reminder" window, click **Next**.

- 6 The following page appears. Select the product that you want to update. Then enter your subscription key into the field titled "Type the subscription key for the selected subscription service:"



- 7 Click **Next**. (If the subscription key is not accepted, you will get one of these error messages: "The number you entered is not a valid confirmation number..." or "Invalid subscription number." If you get one of these messages, read the document "The number you entered is not a valid confirmation number..." or "Invalid subscription number.")

The "Subscription Recap" screen confirms your purchase. Click Finish.

- 8 Connect to the Internet. (You may need to restart the computer to start the Internet connection again.)
- 9 Run LiveUpdate to download the product updates. (For information on how to run LiveUpdate, read How to run LiveUpdate.)

## To confirm your subscription renewal

You can make sure the renewal worked by looking at your subscription expiration date. For details read Determining if your subscription renewal succeeded.

## What to do if the subscription is still expired, or is not for the right length of time

- If the subscription did not renew for the correct length of time, follow the steps in *Your Subscription was renewed for only 90 days*.
- If the subscription is still listed as "Expired," follow the steps in *Your Subscription is still expired after being corrected by Symantec*.

## Error: "The number you entered is not a valid subscription key. . ." or "Invalid subscription number"

### Situation:

You bought a Symantec product subscription. You typed the subscription key (also called a confirmation or subscription number) in the subscription key box. When you click **Next**, you see one of these error messages:

"The number you entered is not a valid subscription key. Please check the number and try again."

"The number you entered is not a valid confirmation number. Please check the number and try again."

"Invalid subscription number."

### Solution:

Usually you see this message when there is a typing error or the wrong code is typed in. To find and correct the problem, begin with the instructions in "To check the subscription key."

## To check the subscription key

Before you type in the subscription key, make sure that it is the correct number.

- Subscription keys have eleven digits. They use both numbers and letters.
- Several subscription numbers are sent in the same email. Make sure that the number you are using is for the subscription that you are trying to renew. Here is how to decode the letters:
  - ND for Norton AntiVirus and Norton AntiVirus Professional Edition 2003 and 2004.
  - SP for Norton Internet Security and Norton Personal Firewall.
  - SA for Symantec AntiVirus for Palm OS and Norton AntiVirus Professional Edition 2001 and 2002.
  - AE for Symantec AntiVirus for Handhelds.
  - AA for Norton AntiSpam.

**If the key that you are trying to enter does not match this format**, skip to the section "What to do if you do not have a subscription key."

**If you have more than one product installed that uses a subscription**, on the window where you type in the subscription key be sure you click on the product name in the top box (under Your Subscriptions). Then, in the "Type your subscription key..." box at the bottom, type the subscription key for that product. Make sure it starts with the correct letter combination (ND, SP, SA, AE or AA).

- If your subscription key contains a "0," type it as the number zero (not the letter "O").
- Use the Shift key when entering capital letters. Subscription keys are case sensitive.
- Subscription keys expire. If you were sent the subscription key more than 2 weeks ago, contact Customer Service to request a new key. Please give them your order number so they can find your purchase.

To contact Symantec Customer Service, go to the regional support page. From the regional support page, click your region or country. Follow the on-screen instructions from there. If you choose the online support option, click "I need help with subscriptions" and then fill out the form that appears.

## Microsoft Office

Microsoft Office is a suite of business applications you will use in your day to day operations. The Microsoft Office suite consists of:

 Microsoft Word

Word gives you tools to easily create, share and read documents.

 Microsoft Excel

Excel helps you to turn data into readable information with powerful tools to analyze, communicate and share results. The output of Excel is spreadsheets.

 Microsoft Outlook

Outlook is where you send and receive emails. It provides an integrated solution for managing and organizing e-mail messages, schedules, tasks, notes and contacts.

You should be aware this software has been installed on your system. Most computer stores offer one day training classes for Microsoft products. If you feel like you need training, sign up for a class! CompUSA and Fry's Electronics both offer Saturday afternoon classes.

## Adobe Acrobat

Adobe Acrobat allows you to easily convert any electronic or paper document—even a Web site—to a reliable Adobe Portable Document Format (PDF) file for exchange and review with others. PDF is a universal file format that preserves the fonts, images, graphics and layout of the document.

 Acrobat Reader

You should be aware this software has been installed on your system. A lot of documents from Kahala will come to you in this format.

# Module Three – Front of the House

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## Module Three Objectives

Upon completion of this module, you will be familiar with:

- Workstation Overview
- Cashier In/Out Procedures
- Item Entry Procedures
- Manager Procedures
- Workstation Reports

## Panasonic Workstation Overview

With the Panasonic system, you use touch screen workstations both to register customer orders and to perform daily operations such as clock-in and clock-out. You use your SMP software to take reports, to adjust daily programs, to update cashier, employee, and item files, and to perform other manager and supervisor operations.

This section provides information about components common to Panasonic touch screen workstations. It covers basics, such as screens and customer receipts. It also provides an overview of the keys that display as you operate the workstation.

Review the information in this section before you continue to the following operating procedures.



## Workstation Screens

The workstation has an active matrix touch screen, which displays the keys you use to register customer orders. It includes menu item keys, payment keys, and function keys for operations such as error correction, clock-in, clock-out, and log-on. It also shows what you are doing at the workstation. If you are registering an order, the screen displays the items and all information you have registered for the order. If you are performing a function such as log-on, the screen displays information about the log-on function.

This section provides an overview of your workstation screen. Remember that the layout and most of the key names are programmable, so your screens will not be identical to the ones described here.

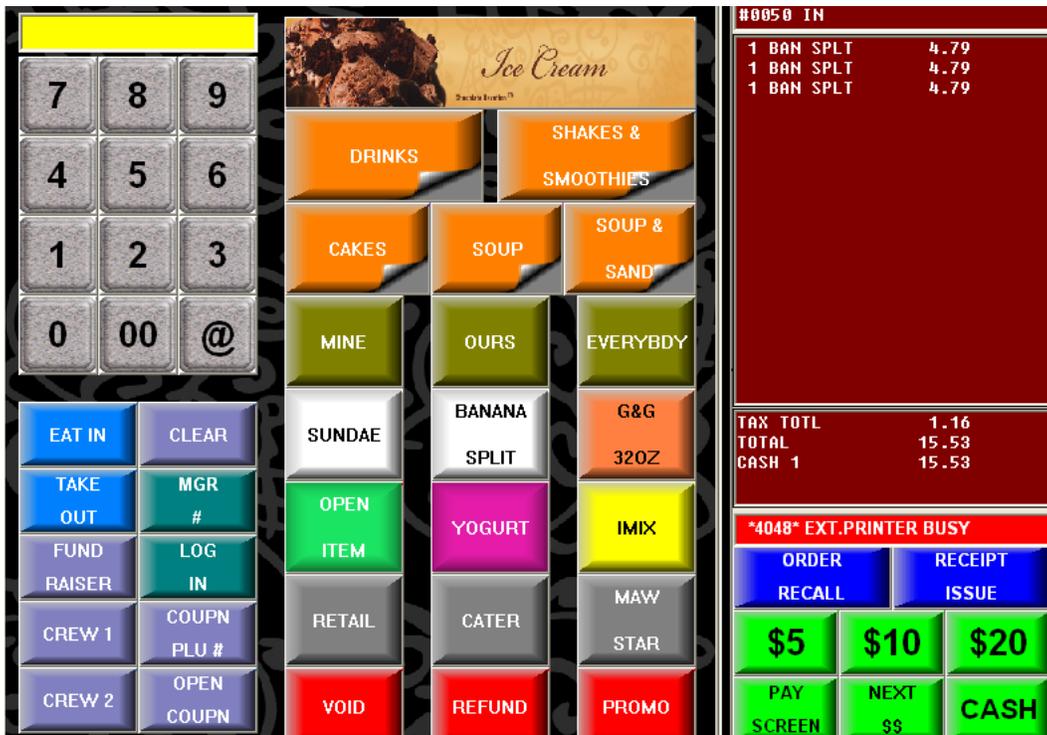
### Touch Screen Overview

The touch screen displays keys you use for customer orders and for all other operations at the workstation. Its layout and the keys you see are programmable, so it can be set up to make your operations as quick and easy as possible. The following is the *Login* screen.



## Cold Stone Creamery - Touch Screen Layout

This example shows a touch screen layout with item keys, number keys, overlay keys, and other keys you use to register customer orders.



### Overlays

The above screen is the *Order Menu* screen, which includes several overlay keys. Ice Cream, Drinks, and Cakes are all examples of overlay keys.

When you press one of these keys, the screen opens an overlay with possible selections. For example, when you touch the Drinks key, the screen displays an overlay with all keys you use to register items from the drink's menu. After you make a selection, you press the EXIT or a Speed key to clear the overlay and move to another one.

Your program decides what keys appear on the overlay and when the overlay clears.

The following example shows the overlay opened with the Drinks key. Speed keys are highlighted in yellow.

Speed keys move you from overlay to overlay bypassing the EXIT key.

The screenshot displays a POS system interface with a drink menu overlay. The 'DRINKS' key is highlighted in yellow. The interface includes a numeric keypad, a 'Drinks' menu with categories like WATER, SODA, NON CARB, TEA/LEM, CARB, COFFEE, and HOT CHOC, and a transaction summary on the right.

Drinks	
WATER	
SODA	NON CARB
TEA/LEM	CARB
OPTIONAL	
COFFEE	HOT CHOC
LIKE IT	LIKE IT
LOVE IT	LOVE IT

#0050 IN	
1 BAN SPLT	4.79
1 BAN SPLT	4.79
1 BAN SPLT	4.79
TAX TOTL	1.16
TOTAL	15.53
CASH 1	15.53

\*4048\* EXT.PRINTER BUSY

ORDER	RECEIPT
RECALL	ISSUE
\$5	\$10
\$20	
PAY	NEXT
SCREEN	\$\$
	CASH

EXIT ICE CREAM DRINKS SHAKES & SMOOTHIES

The next example shows the logon overlay. Use this overlay to logon, to clock-in/clock-out, and to enter the manager overlay.





# Cashier In/Out Procedures

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Panasonic workstations have four possible operating modes: Front Counter, Order-Taker, Cashier, and Order-Taker/Cashier. Operations at the counter use Front Counter mode. Operations at the Drive-Thru can use a combination of Order-Taker (OT), Cashier, and Order-Taker/Cashier modes. The mode selected for your workstation decides the steps you use to register an order from start to finish.

This section covers cashier in/out procedures performed at the register. Use these procedures as a guideline; then refer to the item entry procedures to see how to register items.

Before you start taking orders at any workstation:

- Make sure the workstation is in the REG operating mode.
- Make sure a cashier is logged on. (See the Cashier Log-on procedure.)
- Clock-in if you use Time & Attendance functions.
- Check the Receipt Stop status. ("RS" means the receipt is stopped.)

## Clock-in & Clock-out

If you are using System Manager Pro (SMP) Time & Attendance functions, your program can be set to force you to clock in before you start registering customer transactions. With the Panasonic system, you perform clock-in and clock-out functions on the workstations and the information is captured in System Manager Pro.

Your program decides where clock-in, clock-out, and break procedures begin. Start with an individual CLOCK IN, CLOCK OUT, and BREAK button. Your program decides other factors about your time clock procedures. For example, you might need to clock in before you register orders; manager log-on might be required, and you might use schedules to control how early or late employees can clock in or out.

The following procedures provide an overview of clock-in and clock-out procedures. For details about these functions, please see the Time & Attendance portion of this manual or use the SMP On-line Help.



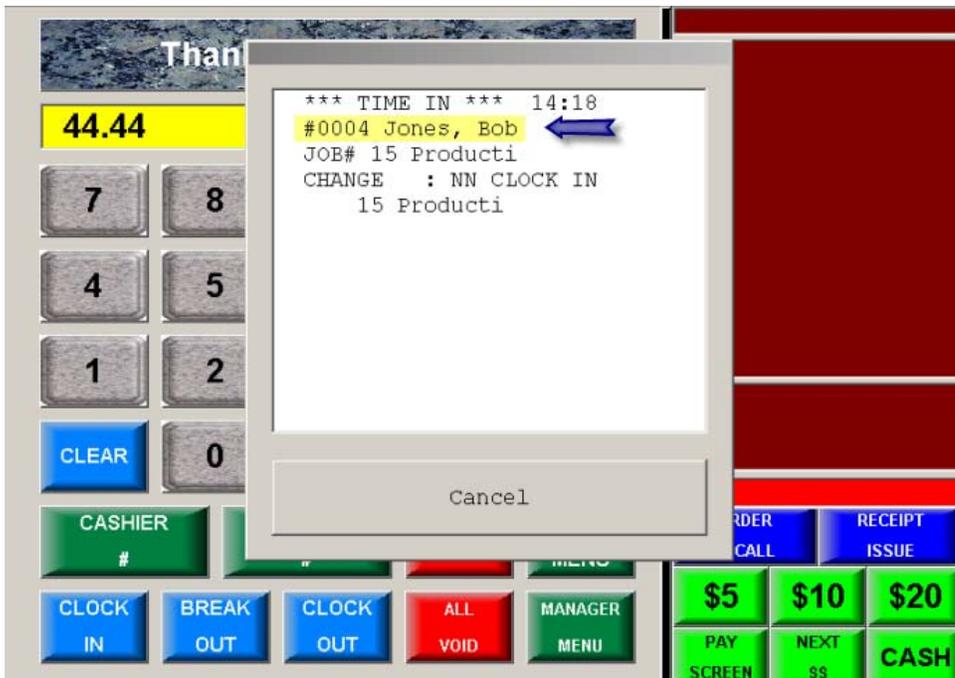
## Clock-in

You can clock in at any workstation that has a TIME IN key or a CLOCK IN key. This key records the time and the job code of the shift you are starting. Every employee can clock in as many as ten times per day. Use the following procedure to clock in.

- 1 Enter your clock-in ID number and touch CLOCK IN.



- 2 The screen now shows your name, number, and your current job code assignment.



- 3 Touch the job description line that applies to your shift.
  - Check the screen. If the displayed information is correct, touch the job description line. If you entered an invalid ID, touch CANCEL and start over.

If enabled, a clock-out receipt like the one in this example lists your hours.

```
*** TIME IN ***           08:00
#0001 Employee, Sample
Cashier  JOB# 04
0002 08:00 JUNE19'07      W/S#01 P1
```

## Clock-out for Break

If your restaurant has paid breaks, the BREAK key notes the time your paid break starts. If breaks are not compensated, restaurant policy decides the procedure you use: You may use the following procedure, or you may use the regular clock-out procedure when you leave for a break.

- 1 Enter your number and touch the BREAK key.



- 2 The screen now shows your name, number, and your current job code assignment.
- 3 Check the information on your screen.



*If the information on the screen is incorrect because you entered the wrong ID number, touch CANCEL now and start over.*

- 4 Touch the job description line that applies to your shift.

## Return from Break

When you return from a break, use the same clock-in procedure you normally use at the start of a shift.

- 1 Enter your clock-in ID number and touch CLOCK-IN.

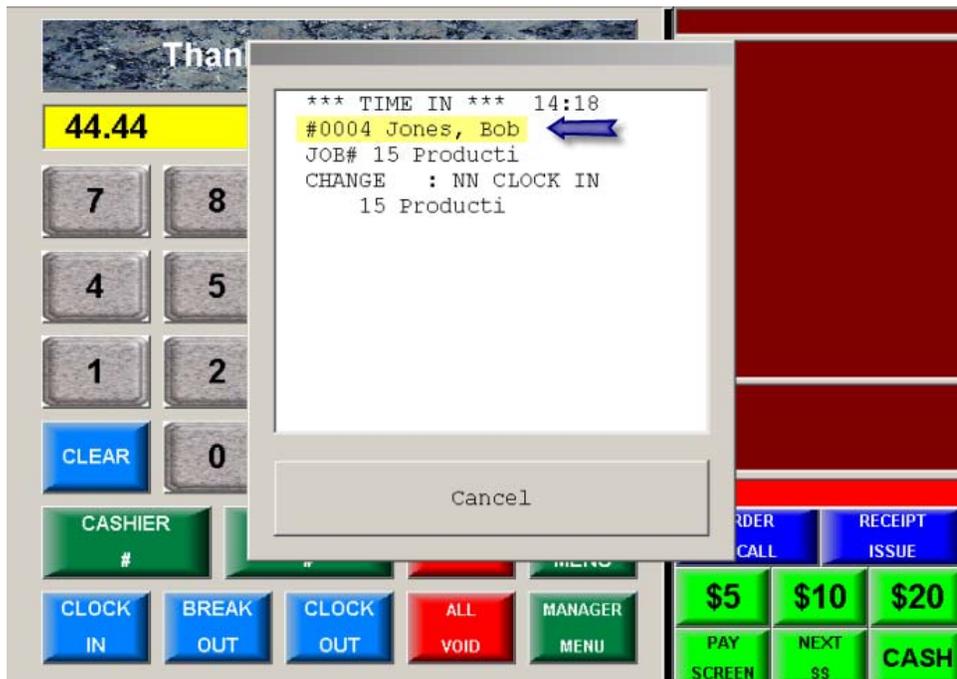


- 2 Check the information on your screen.



*If the information on your screen is incorrect because you entered the wrong clock-in number, touch CANCEL and start over.*

- 3 Touch the applicable job description line. (Your system might prompt for manager approval if you choose a job code that differs from the job code you identified at the start of your shift.)



An error message displays if you are already clocked in, or if you successfully clocked in more than ten times during the current 24-hour time period.

If enabled, a clock-in receipt like the one in this example prints out.

```
*** TIME IN ***           08:00
#0001 Employee, Sample
Cashier   JOB# 04
0002 08:00 JUNE19'07     W/S#01 P1
```

## Clock-out

The clock-out procedure records the end of your shift or the beginning of an unpaid break. Use the following procedure to record a clock-out time.

- 4 Enter your clock-in ID number and touch CLOCK OUT.



- 5 The screen now shows your name, number, and your current job code assignment.
  - Check the screen. If the displayed information is correct, touch the job description line. If you entered an invalid ID, touch CANCEL and start over.

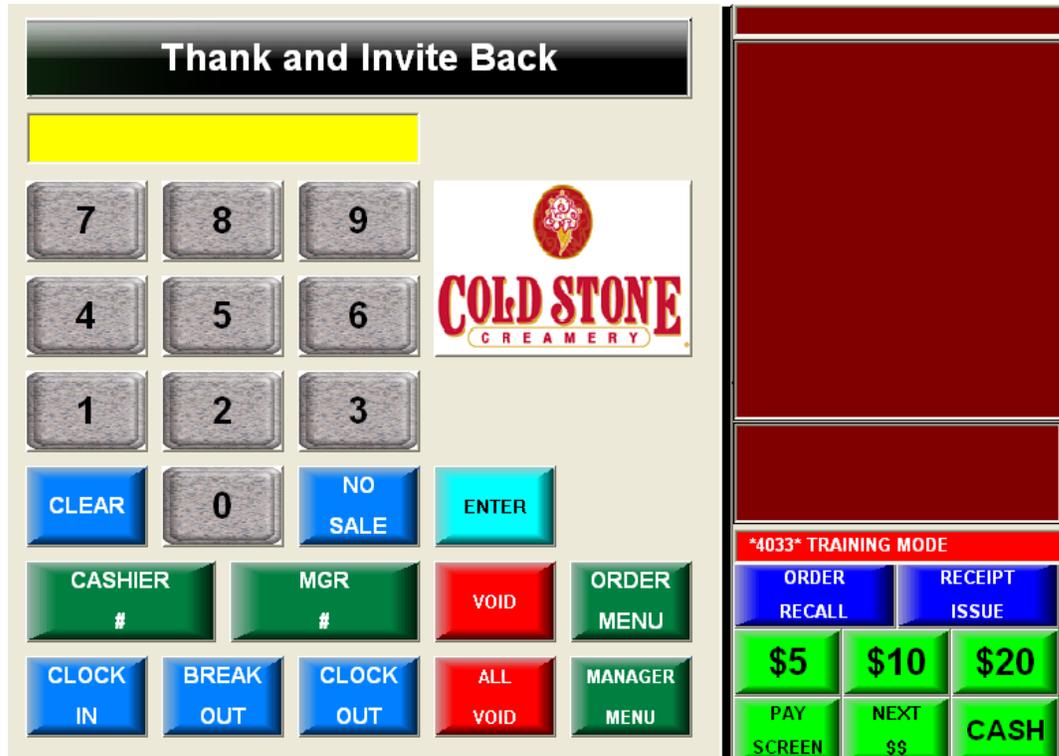
If enabled, a clock-out receipt like the one in this example lists your hours.

```
*** TIME OUT ***           12:00
#0001 Employee, Sample
08:00 -- 12:00           Cashier
Cashier   4.00H
TOTAL    4.00H
0004 12:00 JUNE19'07     W/S#01 P1
```

## Cashier Log-on & Log-off

Before you start orders at any workstation, you must enter or "log on" with a cashier number.

- 1 Enter your number and touch CASHIER # key.
- 2 After completing a sale each cashier is automatically logged off.

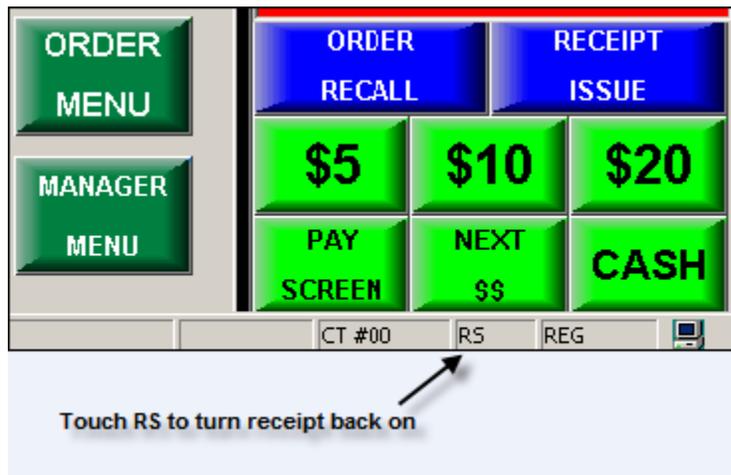


## Receipt Stop

The Receipt Stop button lets you turn on and turn off the customer receipt. If "RS" does not display on your screen, a receipt prints every time you register a customer order. If "RS" displays, the receipt prints only for specific transactions. Use the following procedure to turn on and turn off the receipt.



*Some functions are programmed to print regardless of the Receipt Stop status. For example, the ALL VOID function and NO SALE always issue a receipt for your records.*



If you want to print a receipt for every transaction, touch RS until "RS" does not display.

## Destinations

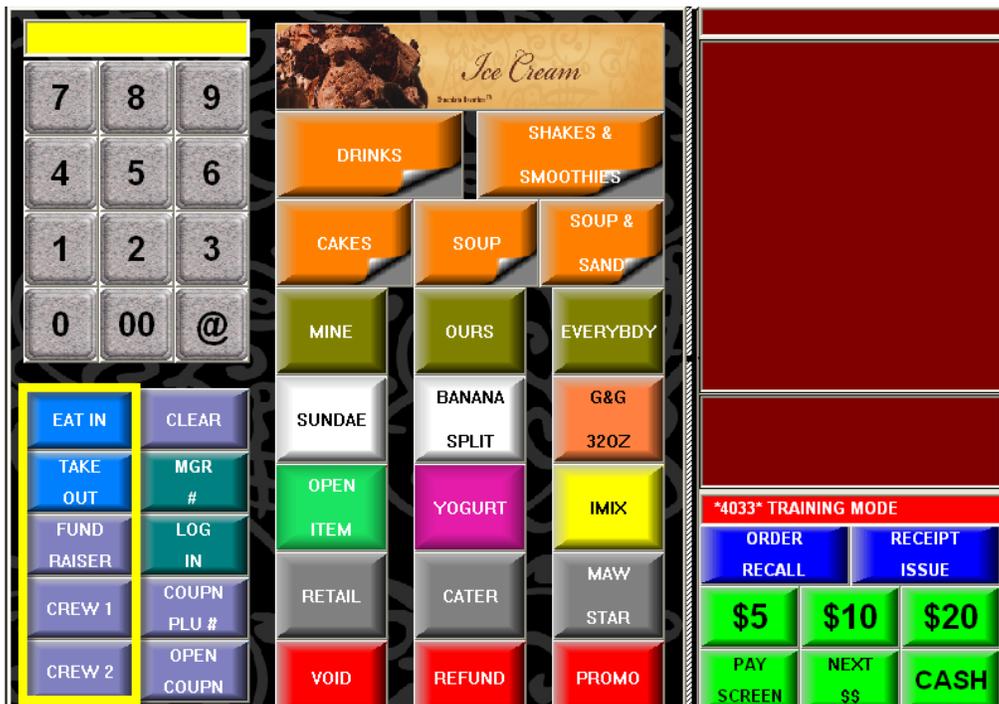
Your workstation can have as many as ten keys to note the destination or profit center that applies to the transaction you are registering. Eat-in, Take-out and Fundraiser are typical examples of destinations. Your system will be set up with destination keys that apply to your restaurant.

A destination is identified at the beginning of a new transaction. You can note this entry with an individual key. The procedure is described below.

## Individual Destination Keys

- 1 Log In with a cashier number.
- 2 Touch the destination key that applies to your order.

The destination you selected displays in the upper left corner of the workstation. If you need to change this entry, touch a different destination. You must change the destination (if needed) before ringing any food items.



# Item Entry Procedures

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This section covers procedures you use to register items for your order. It describes the steps you use to register items, to correct errors, to subtract a coupon or discount amount, and the basic procedures to register your customer orders.

The explanations here list the key (or keys) you touch, as well as any information you must enter to complete the operation.

## Menu Items (PLUs)

Most keys on the Item Screen represent menu items. These keys are sometimes called Price Look-ups or PLUs. You can have Preset PLUs, Coded PLUs, and Open PLUs. Refer to the explanation for the type of item you are registering.

### Preset PLUs

Preset PLUs register the item price, tax, and additional information for the menu item. The screen displays the key name assigned to this item.

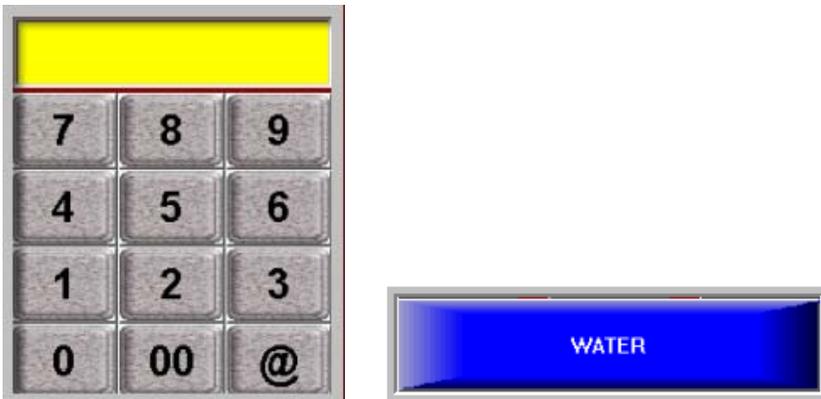
To register a Preset PLU item, just touch the item key.  
(In the following example, WATER is a Preset PLU.)



### Preset PLU Multiplication

When your customer requests more than one of the same item, you have two options. You can touch the item key as often as needed, or you can use the following multiplication feature.

Use the number pad to enter the quantity of like items you are registering, and then touch the item. To ring in three waters, touch 3 then the water key.



## Coupon PLUs

Your system is configured to ring a coupon in an order using the COUPN PLU # key. Your coupons are assigned codes; the codes are PLU items set up to register a negative value. Use this procedure when applying a coupon toward a sale transaction.

- 1 To register a Coupon, enter the coupon code.
- 2 Touch the COUPN PLU # key.



*The system registers the item you selected and updates the sales tax and total lines.*

## Error Correction

Several keys help you correct errors. These keys include CLEAR, VOID, ALL VOID, and DELETE. Each has a specific function. Some are available only during a transaction. Some are available outside of a transaction. Refer to the description for the correction you need.

### Clear

The CLEAR key usually appears in all screens. You can use it to erase an incorrect entry that is not yet printed or displayed. For example, if you accidentally touch a number key, touch CLEAR to erase it. CLEAR also frees the workstation from an error condition after an error message displays.

To clear an error message or number entry, touch CLEAR.



CLEAR erases your last number entry or error message. It does not affect the customer's total, and it does not erase any registered items.

### Voids

You can use the following procedure to simplify item voids. This procedure lets you highlight the exact item to be voided. It is especially helpful if you have registered two of the same item.

To perform a Void, touch to highlight the line with the item you are voiding. Then touch the VOID key. The VOID key is located on several overlays.



The system voids your entry. If "Call Manager" displays, your manager must log on before you touch the VOID key. If an error message displays, your program may not allow voids at this point in the order.

## All Void

Use ALL VOID to void everything (all items and all information) entered for your current order. The VOID key is located on several overlays.

Go to the screen with the ALL VOID key. Touch ALL VOID.



The system cancels all entries for the current order. If manager approval is required, a manager must log on before you touch ALL VOID.

## Delete

Delete lets you make corrections to a paid order. It places your workstation in a "void" mode, which deletes items until you touch a payment key. Delete without exchange of Money or Product.

- 1 Touch DELETE and register all items you need to delete. (The following sequence deletes a Sundae.)



- 2 Close the order with the same payment key used for the incorrect transaction. For example, if the original (wrong) transaction was closed with the CASH key, also use the CASH key for the Delete transaction.



*Satisfy any requirements (amount tender, subtotal, etc.) for the payment key you use.*

## Refund

The Refund procedure lets you "refund" an item registered in a previous transaction. This procedure is available inside or outside of a transaction.

- 1 Go to the PAY SCREEN with the REFUND key.
- 2 Touch REFUND and register the item you are returning.



If you are returning more than one item, remember to touch the REFUND key before every item being returned.



On your screen, the returned items display a negative price, which updates the sales tax and total. If "Call Manager" is displayed, your manager must log on before you start this procedure.

- 3 After the Refund, you can continue the order. Add new items, if necessary, or close the order with the procedures you normally use.

## Promo

The Promo function lets you register an item free of charge. When you need to register a complimentary item, use one of the following procedures to temporarily change a price to zero.

### Item Promo

Use the following procedure to register a single item free of charge:

(First register all items.) Go to the PAY SCREEN, touch PROMO and then touch item you want to register as a promo.



*If your promos require a manager, your manager must log on before you attempt this procedure. You need not enter the promo immediately after the item; enter it any time before you tender payment for the order.*



An asterisk (\*) displays beside all promo items, and the prices change to zero. (On the check or receipt, the word FREE or PROMO replaces the price of the promo items.) "Call Manager" displays if this procedure requires manager approval. "Invalid" displays if the item does not allow a promo.

## Percentage Discounts

Your screen can display several percentage keys for discounts. They are set up with a preset percentage (10%, 15%, 50%, etc.). They apply to all items (set up as discountable) within the transaction.

Preset keys register a pre-programmed discount.



*Discounts can be programmed to require manager approval. If "Call Manager" displays, you must log on a manager number before you try the following procedures.*

### Preset Percentages

Use the following procedure to use the discount keys.

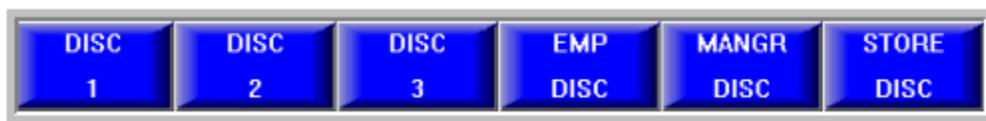
- 1 Register all items that should be discounted.



- 2 Touch the PAY SCREEN key to open the payment overlay.



- 3 Touch one of the following discount keys.



The discount now displays on your screen. Its amount is based on the subtotal of all items registered to this point in the transaction.

- 4 If manager approval is required for your discounts, the system will request a manager number be entered.
- 5 Complete the transaction as you normally would, by using one of the payment types.

## Tax Exemption

If you want to remove all sales tax from your transaction, you can use the Tax Exemption procedure described below.



*The NO TAX key acts as a toggle key. Touch it once to strip the tax from your order. Touch it again if you want to restore the tax to the order. This key affects all items registered during the current transaction.*

If you want to strip all sales tax from the transaction, go to the PAY SCREEN. Touch the NO TAX key.



## Payments

The payment screen has several keys that record the customer's payment and finalize the transaction. Explanations for these keys are divided into the two basic forms of payment; Cash and Charge.

You can use this screen to start the discount procedures. You can also use this screen to strip the tax from your order or to register a Promo.

### Cash Payment

Several procedures are available for cash payment: Exact Tender, Amount Tender, Speed Tender, and Auto-Tender. Refer to the description you need.

#### Exact Tender

Use this procedure if the customer gives you the exact amount due:

- 1 Go to the PAY SCREEN.
- 2 Touch CASH.



or

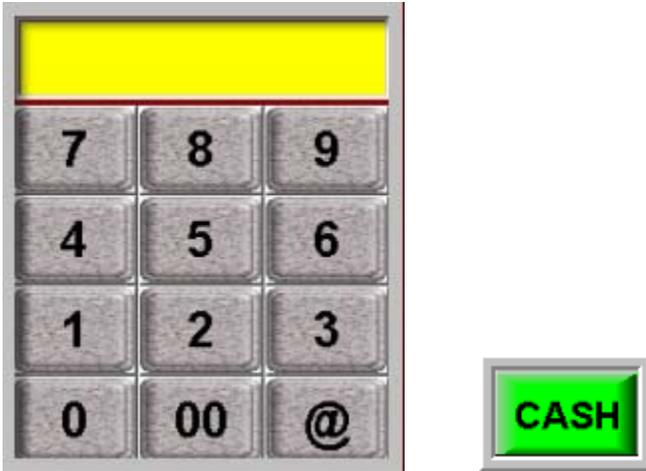
- 3 Use the payment speed keys from any screen that they appear on.



## Amount Tender

Use this procedure if your CASH key requires an amount entry, or if you want the system to calculate change for you.

- 1 Go to the PAY SCREEN or use the payment speed keys from any screen that they appear on.
- 2 Enter the amount the customer gives you and touch CASH.



## Speed Tender

Your screen includes \$5, \$10, \$20 preset cash keys. These "speed tendering" keys automatically tender the indicated amount and finalize the cash transaction.

- 1 Go to the PAY SCREEN or use the payment speed keys from any screen that they appear on.



- 2 Then touch the key with the amount you are given.



## Auto-Tender

The Automatic Tender (NEXT\$\$) key can simplify cash payments. When you touch this key, the system checks the transaction total. Based on this total (and your program), NEXT\$\$ registers an amount rounded up to the nearest dollar amount.

For example, if the current total is \$17.89, NEXT \$\$ registers an \$18.00 cash amount.

- 1 Go to the PAY SCREEN or use the payment speed keys from any screen that they appear on.



- 2 Touch the NEXT \$\$ key.



## Charge Payment

Your PAY SCREEN can include one or more charge keys. It might have a separate key for each credit card, displaying your charge keys. If your workstation has an optional Magnetic Card Reader, you can use it during the charge procedure to read information about the customer's credit card. Refer to the procedure that applies to your system.

## Exact Tender

Use the following procedure if the customer writes the charge for the exact amount owed:

- 1 Go to the PAY SCREEN.



- 2 Touch the credit card key.



## Split Tender

Use the following procedure if your transaction calls for split tender. This is a transaction where part of the meal is paid with a credit card and part is paid with a different credit card or with cash.

Touch the Charge key, the screen displays the amount still due. Enter the remaining amount and touch CASH.

- 1 Go to the PAY SCREEN.



- 2 Enter cash amount using keypad.



- 3 Touch CASH.



- 4 Swipe credit card through the reader and wait for approval.
- 5 If the credit card is approved, your receipts will print in about 5 -15 seconds.

If a "Re-enter" message displays, the split tender procedure is not allowed on your system.

**If your charge keys require an account number entry, use the following procedure to finalize the credit card transaction.**

Use the number keys to enter the customer's charge number. You can enter up to 16 digits.

- 6 Go to the PAY SCREEN.



- 7 Touch the key for the type of credit card your customer is using.



- 8 Enter card number using keypad.



- 9 Press MANUAL ENTER (this acts as an enter key after manually keying in credit, debit, or gift card numbers).

- 10 Enter the expiration date (MMYY) and press MANUAL ENTER.

## Paid Order Recall

The ORDER RECALL key lets you review orders that are no longer displayed in the current order panel. If, for example, a customer has a question about a previous paid order, you can use this key to view the order on the screen.

The following procedure can recall previous orders to your screen.

- 1 Go to the PAY SCREEN.



- 2 Touch ORDER RECALL.



You can scroll through each paid order by touch.



*The number of orders that can be recalled depends on memory allocation. The recalled orders stay on your screen and are replaced with the first in – first out rule as new orders are finalized.*

If you want to print a receipt, touch RECEIPT ISSUE while the order displays.



## Non-Sale Operations

Non-Sale Operations must be performed outside of a transaction. They include No Sale, Paid Out, Paid In/Receive-on-Account, and Finished Waste. The explanations for these functions begin below.



*These functions are not allowed within an order.*

### No Sale

The No Sale function lets you open the cash drawer without registering a transaction.

(Make sure your cashier number is logged on before you start.) Touch NO SALE on the LOG IN screen.



The cash drawer opens, and the system prints a No Sale receipt. A "Call Manager" will display, your manager must log on before you perform this function.

### Paid-Out

Use Paid-Out (P/O) to decrease your cash total. For example, you can use Paid-Out when the amount of cash in your drawer exceeds the acceptable limit or you can use it to record tips paid out. Refer to the Individual P/O Keys or P/O Look-up procedure that applies to your system.

### Individual P/O Keys

Use the following procedure if you have a separate key for every Paid-Out function.

- 1 At the LOG IN screen put the register into manager mode.
- 2 Touch the MANGER MENU key.



- 3 Log in as a cashier.

- 4 Touch descriptor in PAID OUT column.



- 5 Key in amount using keypad.

- 6 Touch CASH.



- 7 Touch descriptor in PAID OUT column again.

- 8 Touch RECEIPT ISSUE.



The system subtracts your amount entry from the cash total.

## Paid-In

Paid-In is a function to receive-on-account an amount of cash received outside of a transaction. You can use it, for example, to record the starting bank for a cashier or to record an amount received from a vendor. Your screen displays an individual key PAID IN key.

## Individual PAID IN Key

Use the following procedure if you have a separate key for each PAID IN function you use. Your entry increases the cash accountability in the workstation drawer.

- 1 At the LOG IN screen put the register into manager mode.
- 2 Touch the MANGER MENU key.



- 3 Log in as a cashier.
- 4 Touch descriptor in PAID IN column.



- 5 Key in amount using keypad.
- 6 Touch CASH.



- 7 Touch descriptor in PAID IN column again.
- 8 Touch RECEIPT ISSUE.



## Waste

Use the Waste key to record an adjustment for a prepared item you cannot sell because it was improperly prepared or returned for some reason.



*This key records finished waste. An example of finished waste would be an expired cake or a cake that has freezer burn.*



The screen displays a "Waste" heading, followed by the items registered as finished waste. The finished waste above is an OURS. The waste item total also displays.

# Manager Procedures

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This section describes operations most often performed by a manager or a supervisor on a workstation. In some cases, functions are considered manager operations because they have been programmed to require manager approval. Other functions, such as reports, are considered manager operations because they are accessed in the Manager Mode screen.

This section begins with the procedure you use to log on a manager number, and then continues through the functions listed on the Manager Mode menu. Refer to the procedure for the function you need. Additional programming and reporting functions can be found in the System Manager Pro User's Guide and in the on-line help content of the System Manager Pro.

Many of the item entry procedures can be programmed to require manager approval, and an authorized person must always perform these operations. Voids, for example, can be programmed to require manager approval; if so, you must ask your manager to log on before you can perform a void.

Some operations display a "Call Manager" message under special circumstances. For example, the CASH key does not usually require manager approval, but if you try to finalize an order with a negative balance (one where you owe the customer money); the CASH key may prompt for a manager. "Call Manager" may also display if you try to enter an amount that exceeds an assigned limit.

## Manager Log-on

When the workstation prompts you to call for manager approval, you must log on a manager before you retry the procedure.

- 1 Touch MGR #.



- 2 Enter manager number using keypad.



- 3 Touch MGR #.



## Training Mode

The Manager Mode menu can include a Training Mode option, which places your workstation in a "practice" operating mode. New cashiers can use this mode to get hands-on system experience, without adding to or affecting your daily report totals. Training Mode transactions affect the Training Grand Total only.

### Turn on Training Mode

Use the following procedure to place the workstation in Training Mode.

- 1 Log on your manager number. (See the Manager log-on procedure.)

- 2 Touch MANAGER MENU.



- 3 Log on as a cashier.

- 4 Touch TRAINING ON.



- 5 Touch EXIT.



- 6 Touch ORDER MENU.



- 7 Ring items in training mode.

## Turn off Training Mode

When you finish a Training Mode session, use the following procedure to turn off Training Mode and return to normal operations.

- 1 Log on your manager number. (See the Manager log-on procedure.)
- 2 Touch MANAGER MENU.



- 3 Touch TRAINING OFF.



- 4 Touch EXIT.



## Manager Reset

Manager Reset can be used when a workstation appears to be in a locked state and the manager has checked and cleared any error conditions in the order.

- 1 Press button in until the red light on the register appears, then release button.
- 2 Press and release the button again until the green light appears.
- 3 Register will reboot and your workstation should now be operational.
- 4 If your workstation is still not operational, attempt the entire procedure again. If the workstation continues to malfunction call your Help Desk immediately and report the workstation condition.



Reboot button is located on the forward right underside of the register.

# Workstation Reports

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Most often, reports are run using System Manager Pro. A number of reports, including the Financial, Time, Cashier, and Manager Reports, are also available at the workstations. This section covers available workstation reports and the procedures you use to request a report at a workstation.

The Manager Menu gives you access to workstation reports. When you want to take a report, you must first decide whether you need the totals on a daily, weekly, or monthly basis.

Your next selection decides which workstation report. There are three options: Terminal, System-wide, and Off-line. You can take an individual report (of a single workstation) with the **Terminal Report** option. If you want a report of combined totals of all workstations on your system, select the **System-wide** option.

## Workstation Reports

Report	Terminal Workstation Reports		
	Daily	Weekly	Monthly
Financial	✓	✓	✓
All Sales Time Report	✓	✓	✓
Destination Time Report	✓	✓	✓
Flash Time Report	✓	✓	✓
All Groups	✓	✓	✓
Individual Group	✓	✓	✓
Groups by Destination	✓	✓	✓
All PLU Items	✓	✓	✓
Range PLUs	✓	✓	✓
PLUs by Destination	✓	✓	✓
All Cashiers	✓	✓	✓
Range Cashiers	✓	✓	✓
All Managers	✓	✓	✓
Range Managers	✓	✓	✓
All Coupons	✓	✓	✓
Range Coupons	✓	✓	✓
All Product Mix Groups	✓	✓	✓
Range Product Mix	✓	✓	✓
Drawer Report	✓	--	--
All Categories	✓	✓	✓
Range Categories	✓	✓	✓
Categories by Destination	✓	✓	✓
86'd Items	✓	--	--

## System-wide Reports

Report	System-wide Workstation Reports		
	Daily	Weekly	Monthly
	Read (X)	Read (X2)	Read (X3)
Financial	✓	✓	✓
All Sales Time Report	✓	✓	✓
Destination Time Report	✓	✓	✓
Flash Time Report	✓	✓	✓
All Groups	✓	✓	✓
Individual Group	✓	✓	✓
Groups by Destination	✓	✓	✓
All PLU Items	✓	✓	✓
Range PLUs	✓	✓	✓
PLUs by Destination	✓	✓	✓
All Cashiers	✓	✓	✓
Range Cashiers	✓	✓	✓
All Managers	✓	✓	✓
Range Managers	✓	✓	✓
All Coupons	✓	✓	✓
Range Coupons	✓	✓	✓
All Product Mix Groups	✓	✓	✓
Range Product Mix	✓	✓	✓
Drawer Report	✓	--	--
All Categories	✓	✓	✓
Range Categories	✓	✓	✓
Categories by Destination	✓	✓	✓
86'd Items	✓	--	--

## Daily Reports

You can request All Register and Single Register reports from your workstations. The procedure you use for report taking depends upon the type of report you need.

### Daily All Register Report

You can take a Daily All Register reading, at any time, without affecting your daily report totals. Use this procedure to print or display a daily report that combines the totals of all workstations on your system.

- 1 Log on your manager number.
- 2 Touch MANAGER MENU.



- 3 Touch ALL REG REPORT.



- 4 Report will print automatically and bring you back to the MANAGER MENU screen.

### Single Register Readings

Single Register Readings report the totals from a single workstation. If you want to check the daily totals at a particular workstation, use the following procedure to print or display the report you need.

- 1 Log on your manager number.
- 2 Touch MANAGER MENU.



- 3 Touch SNGL REG REPORT.



- 4 Report will print automatically and bring you back to the MANAGER MENU screen.

# **Module Four - Back Office (SMP) Software**

---

## **Module Four Objectives**

Upon completion of this module, you will be familiar with:

- An introduction to SMP
- Time and Attendance operations
- SMP data file maintenance
- SMP Reports



## SMP Overview

This module describes functions and operations that will be handled through the Panasonic **System Manager Pro** (SMP) application! This powerful software expands the capabilities of your Panasonic POS system, enhancing communications between your workstations and local personal computer. With this software, you can request reports, accumulate report totals directly to the PC, and perform a variety of functions directly at the PC.

If you are new to SMP, please take a few minutes to familiarize yourself with its features, components, and commands.

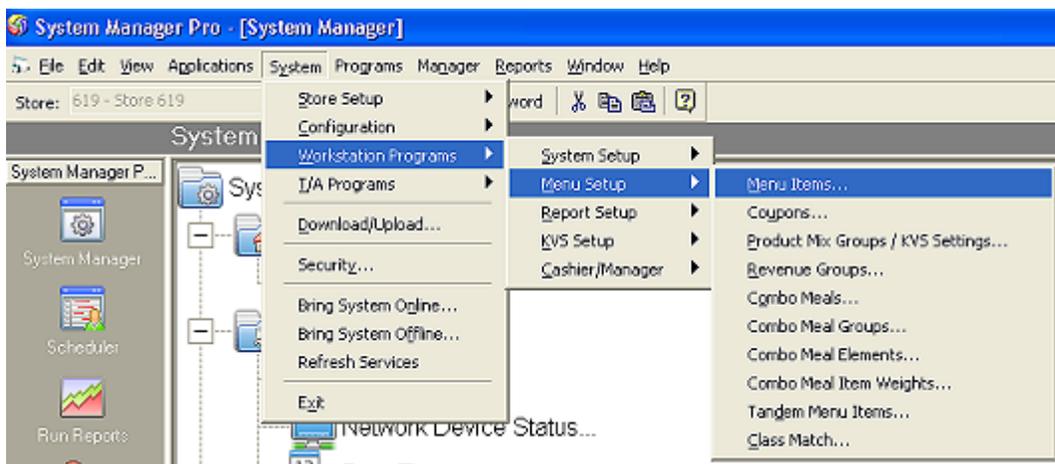
## Menu Bar

The menu bar displays across the top of the screen. It gives you access to the various System Manager Pro functions and dialog menus.



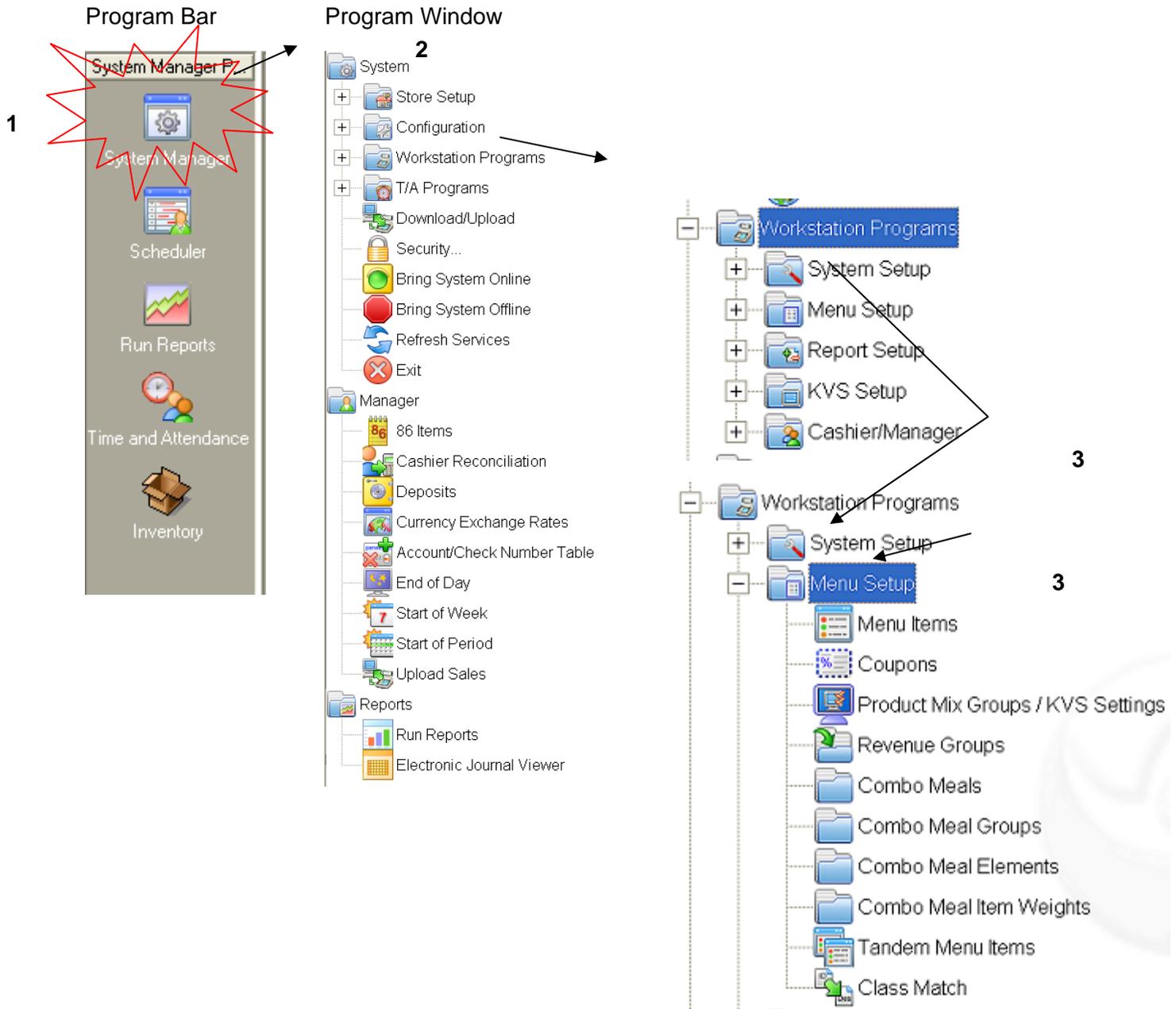
As an example: When instructions include “from the System Menu”, place your cursor on **System** and click your left mouse button.

You do not need to click your left mouse button when additional submenus exist; simply use your mouse to cursor over the next selection. When the final option is highlighted, click your left mouse button again to make the selection.



## Program Window

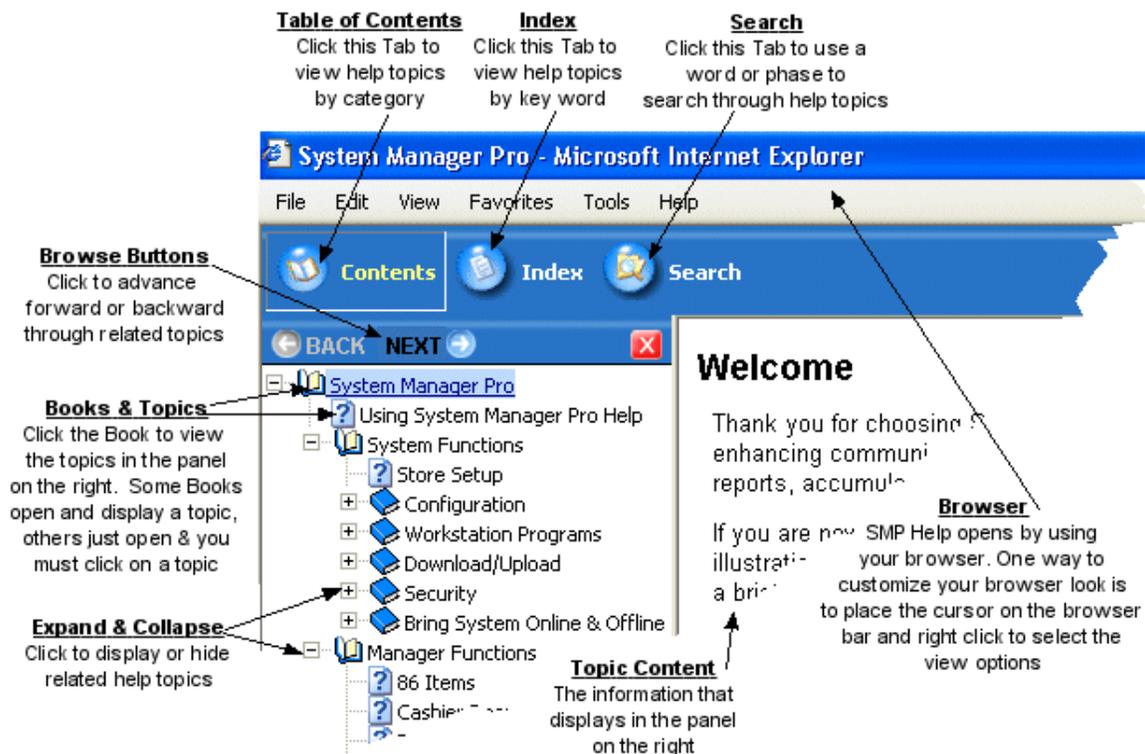
Another way to move around the SMP application is to use the program window. For example, if you click the **1 System Manager** icon, the **2 System Manager** window opens. When you select one of the commands in the **System Manager** window, the table or menu displays **3 program tools** on the screen.



## Online Help

SMP includes a powerful online help file that explains step-by-step how to understand and execute all of the features, components, and commands in the program. Online help is found within the program, so the SMP will need to be running in order for you to use the help feature. To access the help file, press the **F1 key**, or click **Help** on the menu bar and then select Help Topics from the left topic menu.

Once you access the help file, you can look up a topic in several different ways. The graphic below gives an overview of your options:



## Screen shots

The help file includes many SMP screen shots, some of which contain hot spots that give a brief explanation of that particular function or command when you click on them.

## Keys/Commands

Keys and commands you are asked to use appear in bold typeface. For example, the Tab key is often used to advance from one field to the next. The same applies to titles of tables and dialog boxes, as well as menu commands. For example, you may be asked to click on the System menu, point to System Manager Pro, and then click System Manager.

## Saving Program Changes

After making a change to a database table or after adding new information, SMP offers several choices for saving information. Guidelines for saving changes in SMP:

Click **OK** button to save changes and exit the current program or tool.

Click **Apply** button to save changes without exiting the current program or tool.

Click **Cancel** button to exit without saving any changes.

NOTE: Updates made to data used at the POS register require the additional step of 'Downloading the changes' to the register.

## Entering Daily Deposits

Managers may use the Deposit tool to record the amount of cash that has been transferred from the store to the bank. This tool tells SMP to approximate (as closely as possible) how much working cash in the store, and to use that value for the purpose of comparison to actual sales on a cumulative sales report. Cash deposit reporting is NOT required by SMP, however, it provides a simple method for better cash flow tracking and reporting.

### How to use the deposit tool

The manager Deposit tool is used for current day entries only. Deposit entries on this form will clear out automatically after end-of-day has run. Entries to the form remain in SMP until the daily sales reports are purged from the system. To enter a deposit:

- 1 Click on the Deposits Icon under system manager group.
- 2 Select the current business date (set as yesterday by default).
- 3 Click on the insert button to insert a new entry on the deposit line, then enter a manager code and deposit bag number. The deposit form will increment with new entries lines allowing for multiple deposits for each day.
- 4 Enter an amount directly into the amount field or click on the count button (to enter denominations by count).
- 5 Click **OK** button to save and close.
- 6 **To Edit** any deposit record, click on the item row and enter a manager code and deposit bag number. SMP version 2.1 or later will allow for changes or corrections to any previous deposit entry. Note: When editing a deposit record, old information will be overwritten whenever that item is updated.

### Using the Count screen

The count screen will allow the user to enter denominations by number, completing the required 'addition count' for all cash and coin pulled from a drawer. After inserting a new deposit record, click on the count button. Enter a count number for each item, and the count screen will calculate all denominations to create a total deposit. Close the count window and the cumulative amount will be saved on the deposit line.

### Where to see deposits

Entries from the daily deposit form appear at the bottom of the Register totalizer report and the 7-day sales report (weekly report).

## Refresh Services

The refresh service command starts, stops, and reconfigures service dependencies in a single step. Use this command when you feel you may be experiencing communication failures between the SMP application and the workstations, or when you believe your changes are not immediately taking affect.

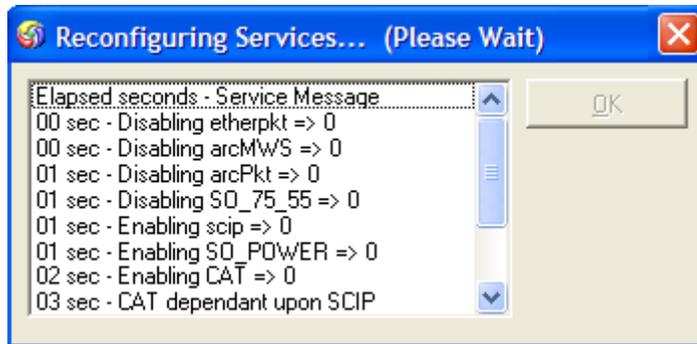
1 Do one of the following:

- On the System menu, click **Refresh Services**,

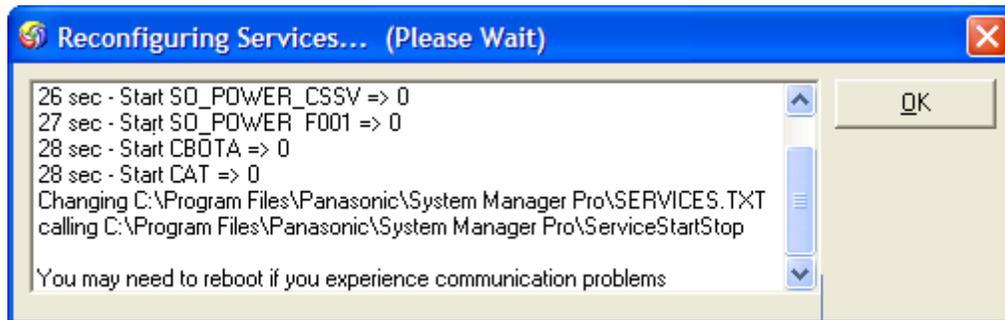
OR

- In the System Manager window, locate and select **Refresh Services**.

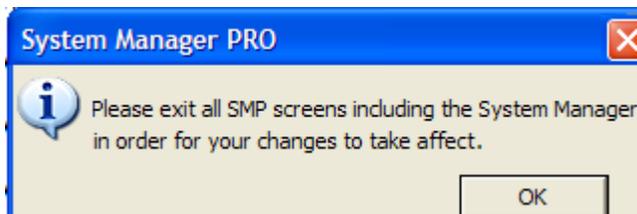
The following window displays:



2 Use the scroll bar to confirm that each service started successfully. When done, the **OK** button becomes available.



3 Click **OK** to exit.



This message displays after OK is selected. To ensure your previous changes are immediately applied; close all SMP windows and start the SMP application again.

# SMP as a Relational Database

---

SMP stores data in a powerful relational database called MS SQL. A relational database is one that stores information by category in areas called tables. Each table may have one or more relationships to other tables. When a report is built, a query is made that ties all of the categories together and pulls data from each table. Once specific information has been created, that item cannot be removed until it is no longer required for its relationship to other tables. This concept is called functional dependency. To understand an example of functional dependency, consider an employee record that uses multiple job assignments to build an employee profile. You cannot instantly delete a job assignment from the job code table if it is in use by related tables. Removal of the job code would automatically orphan all of the employee records that use that particular job code. In other words, the employee record has a functional dependency on those job assignments, meaning if a job were deleted, the employee record would be unable to show the correct data for pay rate, schedule, labor rule, productivity report, etc. SMP prevents this error automatically by enforcement of data purge dates, so you cannot orphan dependent data by mistake.

## Data purge dates

To prevent errors, some records in SMP will not be able to be deleted until after the data purge date for that item has passed. For example, employees need to stay in the system for 1 year after their initial date of hire. The system will allow you to disable employees (and not remove them) so that you can continue to create labor reports that compare old data to new data even after a particular employee is no longer on payroll. The system is dependent upon some forms of legacy data (like dismissed employees) to create accurate year-to-date reporting.

SMP has a custom definition file that tells the program when it can remove old data. Kahala has recommended that most data be saved for at least **1 year**. SMP systems will automatically have the data purge values set for 1 year. The EJ record (for electronic journal receipt tape) will be set to 90 days.

## Terminating vs. Deleting Employees

When employment is terminated, employee records **are not automatically deleted** from SMP and should be saved for 1 year from the termination date. Instead of removing an employee record, managers should set the employee record to **Terminated**. This feature allows past data to be archived for retrieval and historical reporting, but no longer ties the employee to new data. Once the 1 year purge date is passed, the employee record (and all associated or dependant reports) can be deleted out of the Employee records. An *eligible for rehire* checkbox is used as a reminder for those employees who wish to return on a seasonal schedule.

***CAUTION: Never update an old employee record with new employee information! By updating an old employee record with new data you are combining the history of two different employees together. Updates to employee records ARE supported in the SMP, but be aware that any changes made (correct or incorrect) will propagate throughout the system when any dependent data requests it. The proper procedure is to disable the old employee record and create a new record for each new employee. Old records purge automatically after 1 year.***

## **Deleting data in SMP**

Some items can be deleted after they pass the data purge date. For example, employees can be deleted after 1 year (but keep in mind - all child reports will be deleted with them). One of the reasons some items are set to 1 year is because they are being used or have links to other reports that may need to be referenced for at least 1 year. For example, you may need to create a report that gives summary information of payroll taxes, for all employees paid out over the year. It would be impossible to create this if you made deletes throughout the year.

Other items (called look up data) can be deleted once their parent item is deleted. For example, if you created a 'Cool Cake Maker' job assignment, you can delete it once it is no longer being used by any employee. Additionally, you could remove a cashier name or manager number once they are no longer being used by a current employee.

# Time and Attendance

Flexible hours and unpredictable staffing requirements make Time and Attendance a must for today's restaurant systems. System Manager Pro provides you a powerful collection of Time and Attendance tools to track, monitor, and control your restaurant labor cost.

## To Setup Job Codes

Use this window to identify every category of job performed by employees in your restaurant. For each job code category, you must define overtime calculations, grace periods, and employee meal specifications.

- 1 From the program bar, select **Time and Attendance**.
- 2 Double Click **Job Codes**.

The screenshot shows the 'Time and Attendance' configuration window for Job Code '4 - Cashier'. The window is divided into several sections for configuring overtime, breaks, and meal rules.

**Job Code:** 4 - Cashier (dropdown menu) **New** button

**Description:** Cashier **Type:** Cashier (dropdown menu) **Delete** button

**Overtime**

- OT Factor 1: 1.5 OT Factor 2: 0
- Begin Daily OT (Factor 1) After: 0 Hours
- Begin Daily OT (Factor 2) After: 0 Hours
- Begin Weekly OT (Factor 1) After: 40 Hours
- Begin Weekly OT (Factor 2) After: 0 Hours
- Begin 7th Day OT (Factor 1) After: [ ] Hours
- Begin 7th Day OT (Factor 2) After: [ ] Hours
- Enable 7th day Labor Law

**Salary / Tips**

- Prompt For Tips on Clock-Out

**Breaks**

- Job Code is Paid For Breaks
- Minimum Break: 0 Minutes

**Employee Meals**

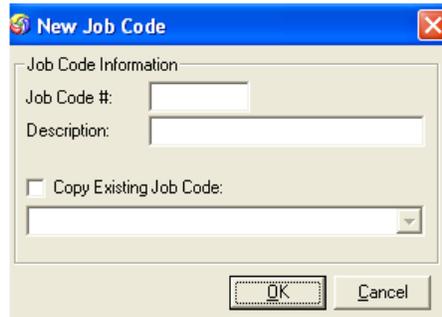
- Minimum Minutes to Earn Meal: 90
- Discount %: Flag 2040A0 (100%) (dropdown menu)
- Maximum Meal Amount: 7

**Grace Periods**

	Minutes	Mgr
Before Clock-In:	10	<input type="checkbox"/>
After Clock-In:	10	<input type="checkbox"/>
Before Clock-Out:	10	<input type="checkbox"/>
After Clock-Out:	10	<input type="checkbox"/>

**Buttons:** OK, Cancel, Apply

3 Click the **New** button to display the **New Job Code** window.



4 In the **Job Code #** box, enter a number to identify the job code you are creating. You can use any available number between 1 and 99.

5 In the **Description** text box, type a description to identify the job code.

6 Do one of the following:

- a) If you want to copy the assignments already entered for another job code, place a check in the **Copy Existing Job Code** check box. Then display the drop down list of job codes and click the one you want to copy.
- b) If you do not want to copy another job code, leave the last two fields blank and continue to Step 7.

7 Click **OK** to return to the Job Code window.

8 When the employee number is to be tied to the cashier log-on and log-off code, click on

▼ in the Type field **Type: Cashier** ▼ and select **Cashier** (the **Server** type is not used in your setup).

9 Complete all fields that apply to this job code.

Overtime fields for Job Codes:

- **OT Factor 1:** Enter the factor to use for your Overtime 1 calculations. Use up to 4 digits and include a decimal, if necessary. For example, if Overtime 1 is paid at time and a half, enter 1.50 here.
- **OT Factor 2:** Enter the factor to use for your Overtime 2 calculations. For example, if Overtime 2 is paid at twice the normal pay rate, enter 2.00 here.
- **Begin Daily OT (Factor 1) After:** Enter the number of hours worked in a day before Overtime 1 begins for this job code. For example, if this overtime begins after an 8-hour day, enter 8.00 here.
- **Begin Daily OT (Factor 2) After:** Enter the number of hours worked in a day before Overtime 2 begins for this job code.
- **Begin Weekly OT (Factor 1) After:** Enter the number of hours worked per week before Overtime 1 begins for this job code. For example, if this overtime begins after a 40-hour week, enter 40.0 here.
- **Begin Weekly OT (Factor 2) After:** Enter the number of hours worked per week before Overtime 2 begins for this job code. As an example, weekly

overtime 1 begins after a 40-hour work week; weekly overtime 2 begins after 48.0 hours.

- **Enable 7<sup>th</sup> Day Labor Law:** When this option box is checked, then the last two factor fields are available. This rule is generally applied to establishments located in the state of California.
  - **Begin 7<sup>th</sup> Day OT (Factor 1) After:** If working on the 7 consecutive day in a week, employees are entitled to additional compensation at OT Factor 1 rate, no matter how many hours they have accumulated for the current week. As an example, an employee has accumulated 25 hours by the end of the 6<sup>th</sup> consecutive work day. Although in a typical work week they are not entitled to overtime compensation until they have reached 40 hours; on the 7<sup>th</sup> consecutive day they will be entitled to compensation based on this rule.
  - **Begin 7<sup>th</sup> Day OT (Factor 2) After:** In addition to the 7<sup>th</sup> day factor 1 rule, an employee may also be eligible for additional compensation after X number of hours worked on the 7<sup>th</sup> day. As an example, the 7<sup>th</sup> day factor 1 is set for 0 hours, the 7<sup>th</sup> day factor 2 is set at 8 hours (Enable 7<sup>th</sup> day Labor Law is selected). Factor 1 hours accumulated (up to the first 8 hours) will be calculated at the factor 1 rate identified in the field titled **OT Factor 1**, Factor 2 hours (after 8 hours in that day) will be calculated at the factor 2 rate identified in the field titled **OT Factor 2**.

#### Grace Periods

- **Grace Periods** are active only when schedules are enforced.
- **Before Clock in:** Enter the maximum number of minutes to allow for an early clock in.
- **After Clock in:** Enter the maximum number of minutes to allow for a late clock in.
- **Before Clock out:** Enter the maximum number of minutes to allow for an early clock out.
- **After Clock out:** Enter the number of minutes to allow for a late clock out.
- **MGR (Manager) check box:** If early or late clock ins and clock outs require manager approval, check the MGR box. Uncheck if manager approval is not required for grace periods.

#### Salary/Tips

- **Prompt for Tips on Clock out:** To prompt for tip declarations on clock out place a check in this box.

#### Breaks

- **Job Code is Paid for Breaks:** If employees using this job code have paid breaks, place a check in this box.
- **Minimum Break:** Enter the lowest number of minutes (00-59) allowed for a break. Employees are restricted from clocking in until after the break time has been satisfied.

#### Employee Meal fields (CSC - Not currently used)

- **Minimum Minutes to Earn Meals:** Enter the minimum amount of minutes an employee must work, during this job code shift, to qualify for a discounted meal.
- **Discount %:** click and identify the discount flag that applies to this employee's meal.

- **Maximum Meal Amount:** Specify the maximum dollar amount allowed per employee for meals during this job code shift.

**10** To update the entries, do one of the following:

- a) Click **OK** to accept all changes and exit the screen.
- b) Click **Cancel** to exit the screen without saving changes.
- c) Click **Apply** to save changes without exiting the screen.

## To Setup Minor Labor, School Calendars and Alerts

The System Manager Pro can help you comply with rules and regulations concerning minor employees. Use the Minor Labor functions to set restrictions concerning minor employees. Once you identify the restrictions, the system can help alert you to potential violations.

- 1 Select **Time and Attendance** from the program bar.
- 2 Double Click **Minor Labor**.

### Ages & Times

You can define two groups of minor employees: Minor Group 1 and Minor Group 2. You may, for example, have one group that represents minors who are fourteen to fifteen years of age and have the other group represent minors who are sixteen to seventeen years of age. The definitions for the two groups are user defined and may be dictated by labor laws and school work programs in your area.

The screenshot shows a software window titled "Time and Attendance". On the left side, there is a vertical navigation bar with three icons: a speech bubble for "Alerts", a calendar for "School Calendars", and a clock for "Ages & Times". The "Ages & Times" section is currently selected and highlighted with a dashed border.

The main content area is divided into two sections:

- Age Ranges for Minor Groups:** This section contains a note: "Note: The Minor Group 1 age range must be less than the Minor Group 2 age range." Below the note are two columns for "Minor Group 1" and "Minor Group 2".

	Minor Group 1	Minor Group 2
Starting Age	14	16
Ending Age	15	17
- Time Ranges for Minor Groups:** This section contains two columns for "Minor Group 1" and "Minor Group 2".

	Minor Group 1	Minor Group 2
Maximum hours on a school day	3	4
Maximum hours on a non-school day	8	8
Maximum hours in a school week	18	48
Maximum hours in a school week (for Work Experience Programs)	23	23
Maximum hours in a non-school week	40	48
Earliest start time, non-summer	7:00 AM	7:00 AM
Latest ending time, non-summer	7:00 PM	7:00 PM
Latest ending time on day before a school day	7:00 PM	10:00 PM
Summer (June 1 to Labor Day) Earliest start time	7:00 AM	5:00 AM
Summer (June 1 to Labor Day) Latest ending time	9:00 PM	12:30 AM

On the right side of the dialog box, there are four buttons: "OK", "Cancel", "Apply", and "Help".

## School Calendars

Use this window to create, to edit, or to delete a school calendar. The calendars you create here help the system identify regular school days and non-school days. You can create a different calendar for each school your employees attend or one for each employee.



*Example: if you have employees from three different schools, you can define three calendars to accommodate any differences between school schedules.*

### Creating School Calendars

- 1 Select **Time and Attendance** from the program bar.
- 2 Double Click **Minor Labor**.
- 3 Select the **School Calendars** tab.

Time and Attendance

Create or edit school calendars here. In the Employees screen, you will assign a calendar to each minor employee. Highlight school days on the calendar below.

School Calendar:

School Week: Starts on  and Ends on

April					2005	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

- 4 Click **New**.

- 5 Click **School Name** in the **New School Calendar** box, and type the school name for the calendar you are creating.



- 6 In the **Calendar Year** box, click  and select the school calendar year from the drop down list.



*If you have created a calendar that is comparable to the one you are creating, you can copy its definitions. In the Make same as box, enter the name of the calendar you want to copy. If you have not yet created any calendars, select Default in Step 7.*

- 7 In the **Make Same as** box, click  and click a calendar to copy.
- 8 Click **OK**, the calendar name now appears in the **School Calendar** box.
- 9 In the **School Week Starts on** drop down, choose the first day of the school week.
- 10 In the **School Week Ends on** drop down, choose the last day of the school week.
- 11 Click **Set** to set your school week starting and ending days.
- 12 The lower half of the dialog box displays a calendar. Click to highlight school days for the displayed month. Click to remove the highlighting from non-school days.



*Based on your entries for School Week “Starts on” and School Week “Ends on”, default school days should already be highlighted.*

- 13 Use the  and  arrow keys to select another month, and then click to highlight school days.
- 14 Repeat step 12 to identify all school days for this calendar.
- 15 To update the entries, do one of the following:
- Click **OK** to accept all changes and exit the screen.
  - Click **Cancel** to exit the screen without saving changes.
  - Click **Apply** to save changes without exiting the screen.

## Alerts

Once you define the restrictions for your minor employees, the system will help you enforce the guidelines by alerting you to potential violations. Your entries in this window decide when the alerts appear, how frequently they appear, and whether the alert is audible.

### Creating Alerts

- 1 Select **Time and Attendance** from the program bar.
- 2 Double Click **Minor Labor**.
- 3 Select the **Alerts** tab.

The screenshot shows a software window titled "Time and Attendance" with a sidebar on the left containing icons for "Alerts", "School Calendars", and "Ages & Times". The "Alerts" tab is selected. The main area contains the following text: "The system will send alerts about potential minor labor violations to selected workstations and printers. Set the parameters for those alerts here." Below this text are two input fields: "Send first alert" with a value of "15" and "minutes before violation", and "Send alert every" with a value of "15" and "minutes". A checkbox labeled "Include audible alarm" is checked. There are two list boxes: "Workstations" containing "REG 1", "REG 2", "REG 3", and "REG 4" (all highlighted in blue), and "Workstation Printers" containing "REG 1", "REG 2", "REG 3", and "REG 4" (with "REG 2" highlighted in blue). On the right side of the window are four buttons: "OK", "Cancel", "Apply", and "Help".

- 4 Enter a value to instruct the system how soon to warn about a potential violation in the **Send first alert xx minutes before violation** box.



*For example, if you want to know about a violation at least 15 minutes before it actually becomes a violation, enter 15 in this box.*

- 5 Enter a value to tell the system how often to alert you about a potential violation in the **Send alert every xx minutes** box.



*Example: if you want the alert to replay every five minutes, enter **5** in this box.*

- 6 If you want to hear an alert, as well see a displayed message; place a check in the **Include audible alarm** check box. Clear the check box if you want the alert to be displayed only.
- 7 In the **Workstations** box, click to *highlight* every workstation that should display the potential alert. The workstations in this box are based on your entries in the System Manager Device Code program.
- 8 In the **Workstation Printers** box, identify the printer(s) where the system should direct printed minor employee information.
- 9 To update the entries, do one of the following:
  - a) Click **OK** to accept all changes and exit the screen.
  - b) Click **Cancel** to exit the screen without saving changes.
  - c) Click **Apply** to save changes without exiting the screen.

## Add Employees

Use the **Employees** window to identify every employee who uses the time and attendance functions. In this window, you record personal information about the employee, as well as information required to maintain clock in, clock out, and break records.

The screenshot shows the 'Time and Attendance' application window. On the left is a list of employees with their names and IDs. The 'Employee' tab is selected, and the 'Personal Data' sub-tab is active. The form displays information for employee Dedria, including her birth date (5/25/1980), social security number (555-456-9598), and address (16101 N. 82nd Street, Suite A4, Scottsdale, AZ 85260). There is also a section for phone numbers and dates (Hired: 4/3/2000, Terminated: 4/11/2001). Buttons for 'Insert', 'Delete', 'OK', 'Cancel', and 'Apply' are visible at the bottom.

Description	Number
Office	480-348-1702 x212
Fax	480-348-1718
*	

- 1 Start in the program bar and select **Time and Attendance**.
- 2 Select **Employees**. Click the **ID** radio button to sort the list by ID number or **Name** radio button to sort by name (last, first).
- 3 Click the **Insert** button to display the New Employee dialog box:

The 'New Employee' dialog box is shown, featuring a title bar with a close button. It contains a text input field for 'Employee #' and two buttons: 'OK' and 'Cancel'.

- 4 In the **Employee #** box, enter any unused number (1-200) to identify this employee.

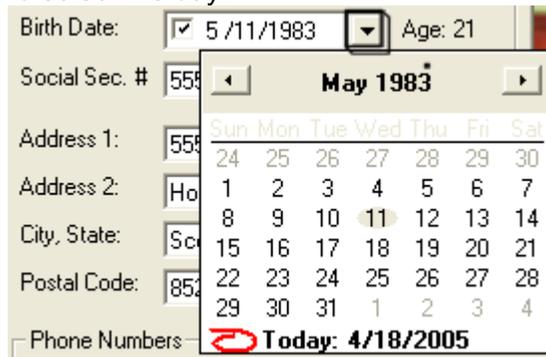


*Your Memory Allocation decides how many employees you can define. For the Employee #, you can use any available number between 1 and 200.*

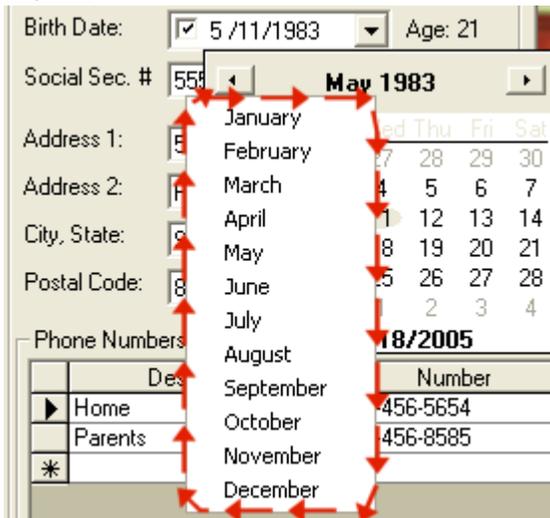
- 5 Click **OK**.
- 6 Click in the **First Name** text box and type the employee's first name. You can use up to 16 characters.
- 7 Click in the **M.I.** text box and type the employee's middle initial (optional).
- 8 Click in the **Last Name** text box and type the employee's last name. You can use up to 16 characters.
- 9 Click on the **Personal Data** tab and fill in the information, including the address, the birth date, and the phone number, for this new employee.
  - a) **Short Name** – you can use up to 16 alpha/numeric characters.
  - b) **Birth Date** – Enter the employee's birth date by:

Replace the date by clicking on the month and type the new date, then click on the date, then the year. Birth Date:  5 /11/1983 Age: 21

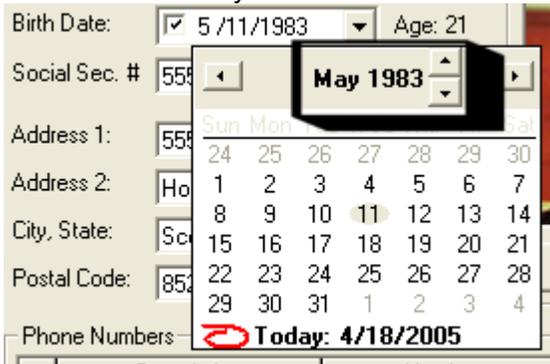
You can also click on the down arrow to open a calendar. Use the right or left arrow buttons to maneuver to the correct month and year. Then click on the date in the month to select the day.



When the calendar is displayed you may click on the Month and select the proper birth month.



Then click on the year and select the correct year.



- c) **Social Sec. #** - Normally this field is used for the employee 9 digit social security number. This field allows up to 15 alpha/numeric characters including the dash (-).
- d) **Address 1 and Address 2** – Enter the employee’s contact address information, up to 20 characters on each line is allowed.
- e) **City** – Enter the city name of the address listed above, this field can accommodate up to 20 characters.
- f) **State** – Enter the 2 character state I.D. for the address listed above.
- g) **Postal Code** – Enter the zip code for the address listed, typically a 5 numerical digit number and may include a dash (-) followed by an additional 4 digits.
- h) **Photo** – A photo may be added to your employee database for proper identification. You must have a way to add the picture to your PC files. For example, you may have a digital camera or a scanner. Once the picture is available on your PC, you may need photo or graphic editor software to modify the picture’s size. The recommended photo size to use is approximately 180 by 156 pixels.
- i) In the **Phone Numbers** section – Enter the description and number of where the employee may be reached. Multiple locations are allowed.

j) **Dates** – The **Hired** date and **Terminated** dates are used for informational purpose only. Enter the proper dates that apply to the employee’s start date. If the employee no longer works at your restaurant enter the employee’s last work date, you may also want to indicate whether the individual may be re-hired in the future by checking the option box **Re-hirable**. This option is only available when the Terminated option has been checked.

**10** Click the **Time Settings** tab and where applicable identify:

- a) Minor employee assignments that apply to this employee; Age Group and School Calendar.
- b) Clock in/clock out requirements: Salaried, Require Job Code at Clock in, Require Tip entry at Clock out.
- c) Employee Code: When the Employee # is not used to clock in\out use the employee code. Your program setting in flag 1037A determines whether the code can be up to a 4, 6, 8, or 9 digit number. You may also be required to log on a Manager.
- d) Payroll ID for this employee. The payroll ID may be up to 9 positions and the format may include alpha and numeric characters.

**11** Click the **Job Assignments** tab to change tables where you can add or modify up to seven job codes that may represent jobs this employee can perform. See the previous section, “To Create Pay Rates” for the steps on adding information to this section.

**12** To update the entries, do one of the following:

- a) Click **OK** to accept all changes and exit the screen.
- b) Click **Cancel** to exit the screen without saving changes.
- c) Click **Apply** to save changes without exiting the screen.

## Create Pay Rates

Pay Rates are defined by employee. You need to access the Employee Screen to list the hourly pay rate available, by employee, in your store.

This screen also lists every type of job each individual employee is authorized to perform. The clock in procedure activates a job code, which identifies the job the employee is performing. The job code specifies the pay rate that applies to hours worked during the shift.

- 1 From the program bar, select **Time and Attendance**.
- 2 Double Click **Employees**.
- 3 Click on the **Job Assignments** tab.

The screenshot shows the 'Time and Attendance' window. On the left, a list of employees is displayed, with 'Doe, Jane (00001)' selected. The main area shows the 'Job Assignments' tab for this employee. The 'Employee #' is 1, 'First Name' is Jane, 'M.I.' is blank, and 'Last Name' is Doe. The 'Job Assignments' table lists several job descriptions with their respective pay rates and active status. The 'Scheduling Notes' field contains the text 'Cannot work Tuesdays'.

	X	Job Description	Active	Pay Rate	Cashier	Manager
▶	✗	MGR HOUR	☑	\$12.50		MANAGER
	✗	CASHIER	☑	\$8.50	Jane	
	✗	PRODUCTN	☑	\$9.50		
	✗	SHFT LD	☑	\$10.50		
*	✗					

- 4 Select the employee whose job assignment you are updating.
- 5 Click an unused line in the **Job Description** field.
- 6 Choose a **Job Description** from the drop down list.

- 7 When a job is first assigned, the **Pay Rate** box is automatically filled with the minimum wage defined in the options menu. To change the rate, highlight the cell under the **Pay Rate** column and enter a new rate amount.
- 8 If this employee works as a cashier, click in the **Cashier** box and select their cashier name.
- 9 If this employee works as a manager, click in the **Manager** box and select their manager name.



*The Cashier and Manager fields associated with the employee record are necessary for reports using labor dollars with sales and labor cost.*

- 10 The **Server** column is not used in your program settings.
- 11 Repeat Steps 5 through 8 to assign up to seven job codes for this employee.
- 12 In the **Scheduling Notes** box, type any reminders regarding this employee schedule. For example, "Cannot work Tuesdays" or "Practice on Thursday afternoon." This information can be viewed within the Scheduler window.
- 13 To update the entries, do one of the following:
  - a) Click **OK** to accept all changes and exit the screen.
  - b) Click **Cancel** to exit the screen without saving changes.
  - c) Click **Apply** to save changes without exiting the screen.

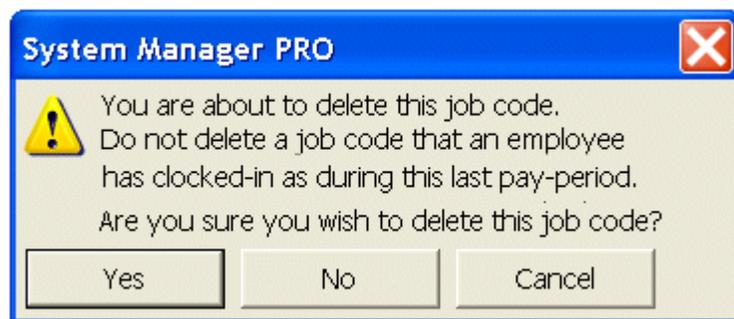


*Whenever you change this file, you should perform the Refresh Services command to stop and restart Time and Attendance services. See the Refresh Services explanation.*

### Deleting a Job Assignment

- 1 Click on the  to delete a particular job assignment.

The following message displays:



*When an employee has active data in a pay period, you should not delete an employee's data record until the last pay period has closed.*

## Edit Hours Worked

Use this window to adjust timekeeping entries. You can correct recorded clock in times, clock out times, break times, job codes, and tip amounts. Use this window to edit times, for example, when an employee forgets to clock in at the start of a shift or you need to adjust the hours for the week or period. The edited information displays on screen, in red.

Job Description	IN	OUT	Break	Last Edited By	Last Edit
Cash	Apr 18, 2005 11:46 AM	Apr 18, 2005 02:46 PM	<input checked="" type="checkbox"/>	SBSTEMPE	4/18/2005 1:47:33 PM
Cash	Apr 18, 2005 03:16 PM	Apr 18, 2005 06:45 PM	<input type="checkbox"/>	SBSTEMPE	4/18/2005 1:48:29 PM

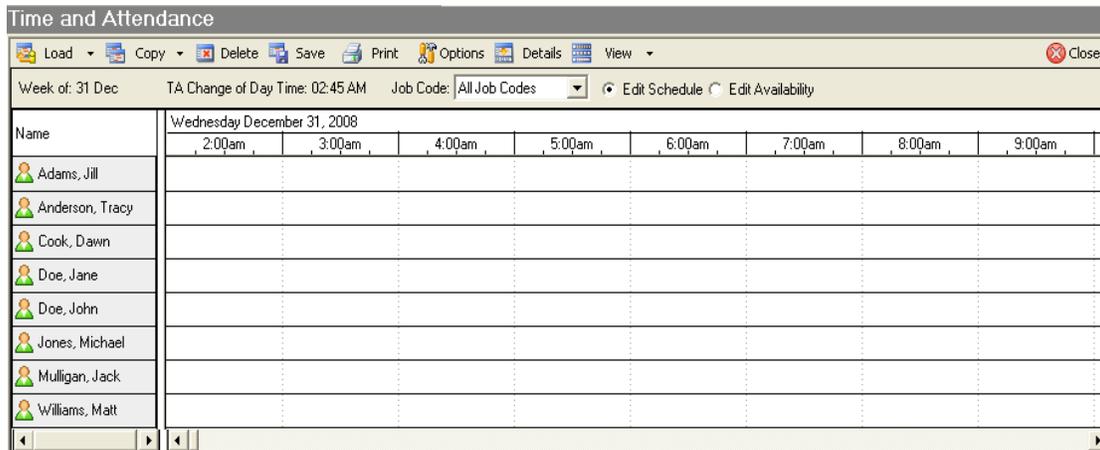
- 1 From the program bar, select **Time and Attendance**.
- 2 Double Click **Edit Hours Worked**.
- 3 Click  in the **Select Period** box and select one of the periods to adjust:
  - a) Current (this is the current time frame based on the T&A Pay Period defined in the Options window).
  - b) Previous (this is the previous time frame based on the T&A Pay Period defined in the Options window).
  - c) Custom (you define the time frame to edit).
- 4 Select the employee with entries to edit.
- 5 Locate the line with the entry to change.
- 6 If a job code is incorrect, click  in the **Job Description** field and select the correct job code from the drop down list.
- 7 If a clock in time is incorrect, click the **IN** field to adjust and enter the correct clock in time. Include an **A** for A.M. time entries or a **P** for P.M. entries.

- 8 If a clock out time is incorrect, click the **OUT** field to adjust and enter the correct clock out time. Include an **A** for A.M. time entries and include a **P** for P.M. entries.
- 9 If the entry on this line notes a break, place a check in the **Break** field.
- 10 Repeat steps as needed for each employee selection.
- 11 To update the entries, do one of the following:
  - a) Click **OK** to accept all changes and exit the screen.
  - b) Click **Cancel** to exit the screen without saving changes.
  - c) Click **Apply** to save changes without exiting the screen.

## Create a Schedule

Creating schedules involves identifying the jobs to be performed, identifying the shift or time slot to fill, and then assigning employees to fill the shifts. The Scheduler helps you with each step of this process. Use the following procedure to create a completely new schedule.

The Scheduler initially displays a blank schedule work area.



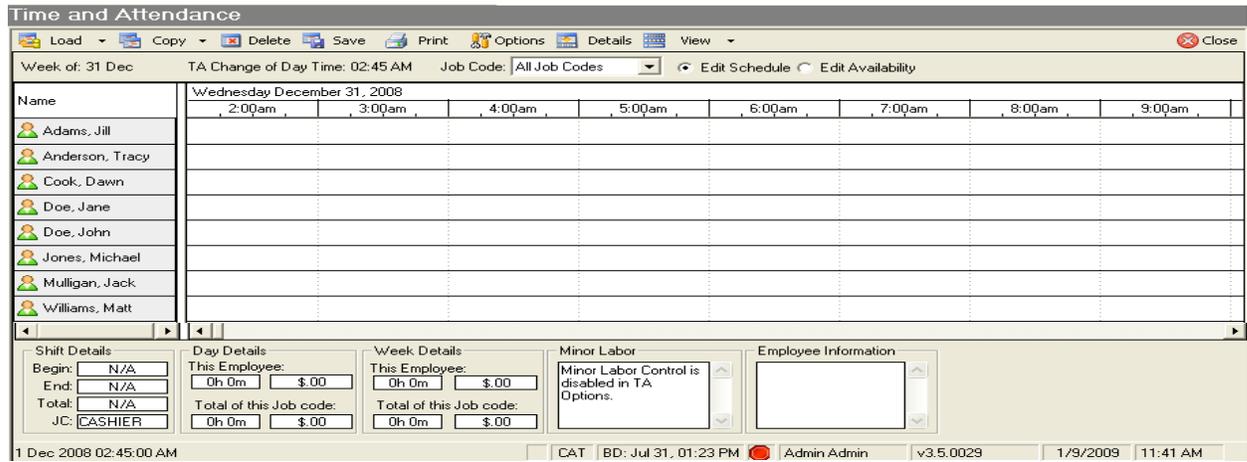
- 1 From the Program bar, select **Time and Attendance**.
- 2 Double click **Employee Scheduler**.
- 3 To identify the schedule you are creating, click **Load**, and then click the schedule start date.
- 4 To identify the **Job Code** you are scheduling, click  in the **Job Code** box and select the **Job Code**. The job codes that display here are based on your entries in the Time and Attendance Job Codes window.
- 5 Select **Edit Schedule** radio button when adding a time range to the current schedule for the employee.
- 6 On the Scheduler menu bar, click  next to the **View** command and select a view type.
- 7 The Scheduler displays a blank work area for the **date**, **job code**, and **view** you selected.
- 8 Identify the shift starting and ending times for each employee. You can draw the time bar directly in the schedule work area.
- 9 Position your cursor in the row of the **employee** you are scheduling and in the column of that employee's **starting time**.
- 10 Click and hold down the left mouse button.

11 Drag the bar to the employee's ending time.



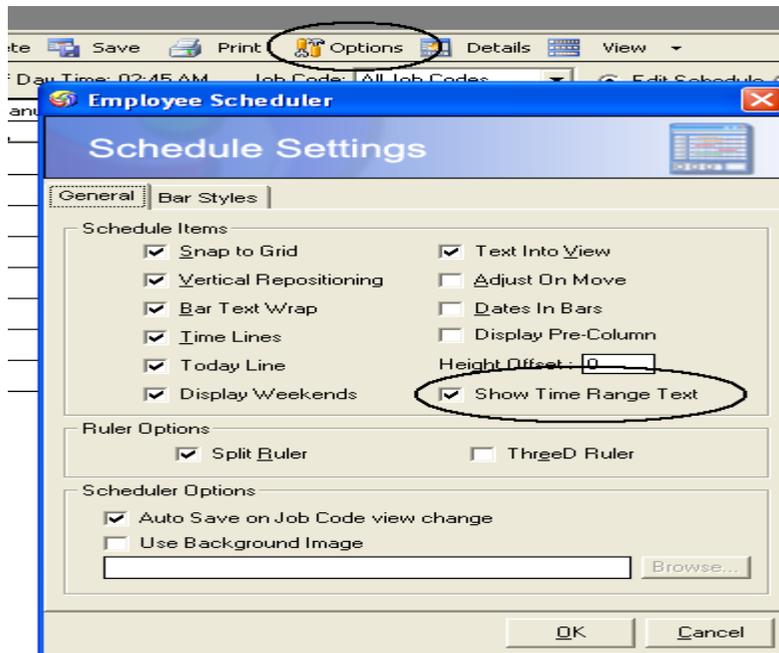
*If you make a mistake, click the incorrect time bar and click Delete. When the dialog box asks you to confirm the delete, answer Yes if you are sure you want to delete the selected time bar; answer No if you want to escape without deleting the time bar.*

12 To view Employee and Total Job details by **Shift**, **Day** and **Week** click on the **Details** button on the Scheduler menu bar. This button can be used to toggle on and off the Details section that displays at the bottom of the Scheduler window.



13 Repeat steps to fill all shifts for the displayed job code.

14 To view times in the time bar, select **Options** and check **Show Time Range Text**.



15 After you complete the schedule for this job code, do one of the following:

- a) Click **Save** if you want to save your work to the database.

OR

- b) If you do not want to save your schedule, click  and answer **No** when the dialog box asks if you want to save your changes. If you choose this option, you lose ALL job code schedules you created during this session.

## To Create an Employee Availability Schedule

In the previous outline to Create a Schedule, step 4 had you select the 'Edit Schedule' option. However, you may wish to add to the schedule the time periods that an employee is unavailable. The effects are applied to the schedule you are currently in.

- 1 In the **Name** column on the Scheduler window, locate and click on the employee to edit.
- 2 Select the **Edit Availability** radio button located on the menu bar of the Scheduler window. Notice that the background on the Scheduler window changes to an Aqua color.
- 3 Select the proper day and start time for the time period that the employee is not available to work. Click on the start time and drag the bar to the end time.
- 4 Once the time period is defined you can double click on the bar to modify the time details and add text content to describe a reason.



*The color fill of the bar for the defined time period is preset and cannot be edited.*

*When in Edit Schedule mode, unavailable time periods cannot be edited.*

## Copy a Schedule

In many instances, schedules are very similar from one week to another. If you are creating a schedule that is like another in your database, you can use the following steps to copy the existing schedule.



*If you want to copy an existing schedule, you must do so **BEFORE** you set any assignments for the current job code schedule. The schedule you copy overwrites all scheduling information you have entered for the displayed job code.*

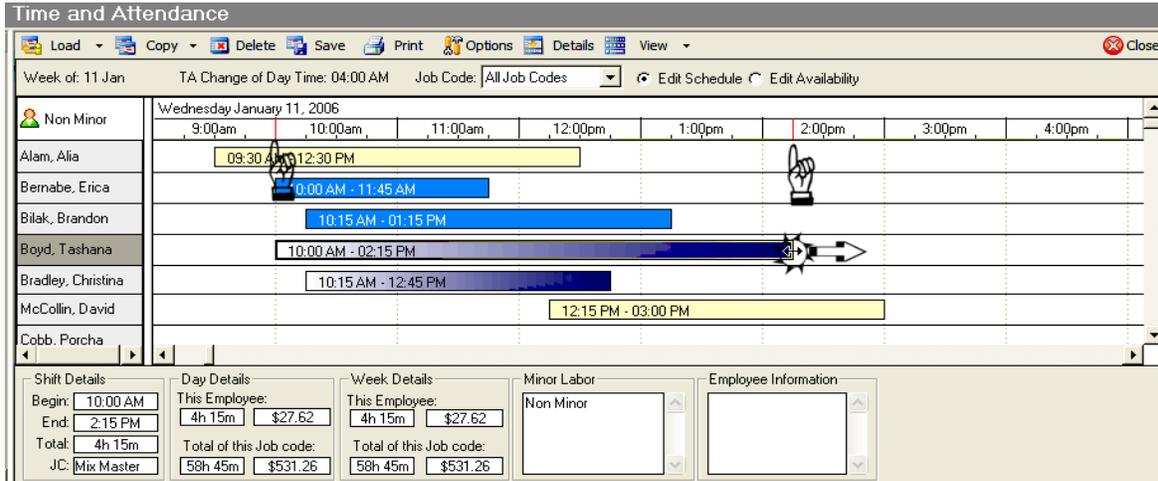
- 1 Click **Employee Scheduler** from the program bar.
- 2 To identify the schedule you are creating, click **Load**, and then click the schedule start date.
- 3 To identify the **Job Code** you are scheduling, click  in the **Job Code** box and select the **Job Code**. The job codes that display here are based on your entries in the Time and Attendance Job Codes window.
- 4 Click **Copy**.



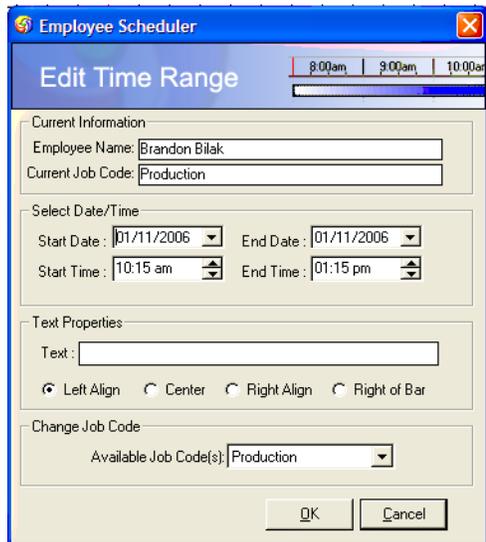
*The copied schedule will overwrite any assignments for the displayed job code. If you are sure you want to copy in another schedule, continue to Step 5.*

- 5 Click the  arrow to display the schedule calendar. Advance to the **month** and **date** of the schedule you want to copy.
- 6 Click on that **date**.
- 7 When the Employee Scheduler dialog box warns that you will lose all data entered for the current schedule, do one of the following:
  - a) Click **OK** if you are sure you want to copy the selected schedule to the schedule you are creating; **OR**
  - b) Click **Cancel** if you want to stop the Copy command without losing data you entered for the new schedule.
- 8 Click  and select **view** type in the view menu. This just changes the graph layout perspective, and can be toggled back and forth at any time.
- 9 Check the assignments on the copied schedule to see what changes are needed.
- 10 To change a displayed time bar, do one of the following:
  - a) To change the start time for a shift, click the **start** of the time bar and drag the border to a new starting time.
  - b) To change the end time for a shift, click the **end** of the time bar and drag the border to a new ending time.
  - c) To delete a time bar, click the time bar and click **Delete**. When the dialog box asks you to confirm the delete, answer **yes** if you are sure you want to delete this time bar. Otherwise, answer **No** to escape without deleting.
  - d) To add a time bar, start in the line of the employee you are scheduling. Click the starting time and drag to the ending time of the shift.
- 11 Click **Save**.

## Edit a Schedule



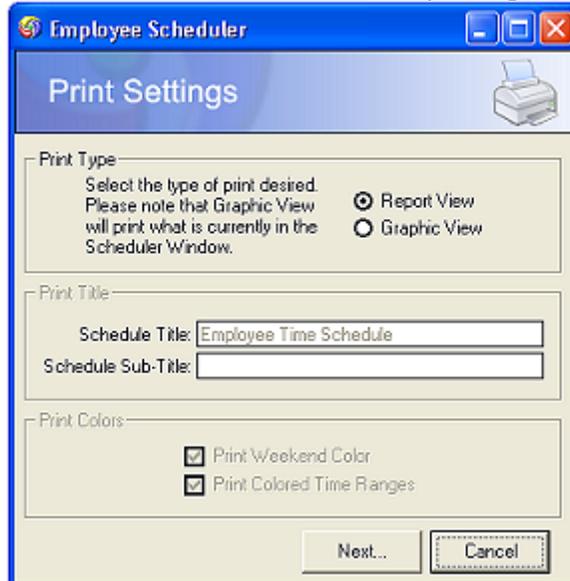
- 1 Click **Employee Scheduler** from the program bar.
- 2 To identify the schedule you are creating, click **Load**, and then click the schedule start date.
- 3 Click on the time you want to edit and drag it to the desired time.
- 4 Alternately, you can double click on the time range bar.
- 5 An Edit Time Range menu opens, Click in the **Start Time** or **End Time** field and enter the revised time.



- 6 Select **OK** to close menu.
- 7 Click **Close**.
- 8 Click **Yes** when prompted to save changes.

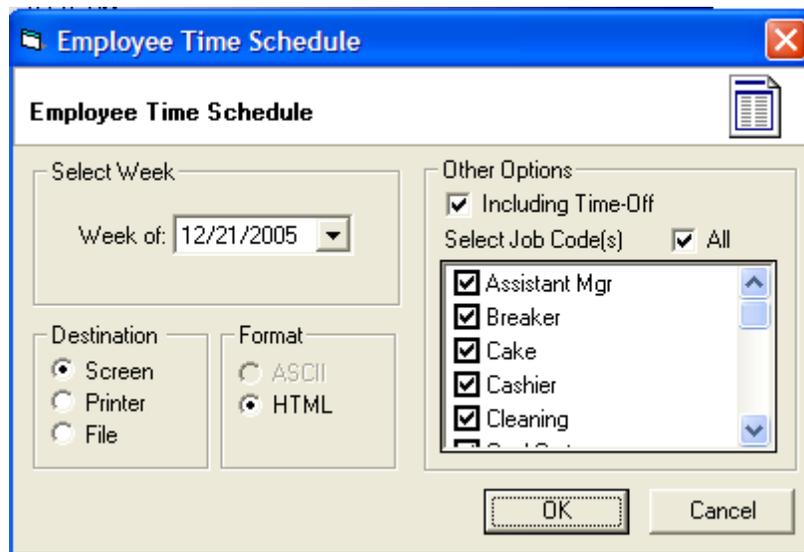
## To Print a Schedule

Use this dialog box to print a schedule for reference or for posting:



When you request a schedule printout, you have two initial options: **Report** or **Graphic** View.

**Report View** – Use if you want to print a schedule not currently displayed in the Scheduler work area. Report View allows you to select a specific schedule and specific job codes to print. Report View is best for printing and posting the schedule.

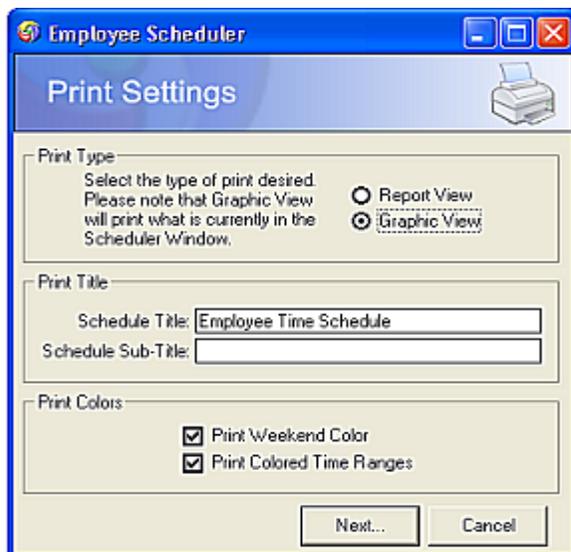


- 1 Click the **Scheduler** icon from the program bar.
- 2 Click **Print** to display the Print Settings dialog box.
- 3 Select **Report View**.
- 4 Click **Next** to display the Employee Time Schedule dialog box.

- 5 Click the drop down box in the **Week of** field.
- 6 Select the week to print.
- 7 Click the **Printer** option button in the **Destination** box.
- 8 To identify the job code to print, do one of the following:
  - a) In the **Select Job Codes** list box, place a check in the check box of each job code schedule you want to print. Clear the check box of job codes you do not want to print.
  - b) If you want to print all job code schedules, place a check in the **All** check box.

Click **OK** to print **Graphic View** – Use this view option whenever you want to print a copy of the schedule currently displayed in your Scheduler work area. Graphic View is better for writing the schedule.

- 1 Click the **Scheduler** icon from the program bar.
- 2 Click **Load** to identify the schedule date to print.
- 3 To identify job code, go to the **Job Code** box, click  and select the job code to print.
- 4 Click the **Print** button to display the Print Settings dialog box.
- 5 For the **Print Type**, click the **Graphic View** option button.



- 6 In the **Schedule Title** text box, type a title for this schedule.



*This entry appears as the heading for the printed schedule.*

7 In the **Schedule Sub-Title** box, type a subheading for this schedule.



*This entry appears below the title on the printed schedule.*

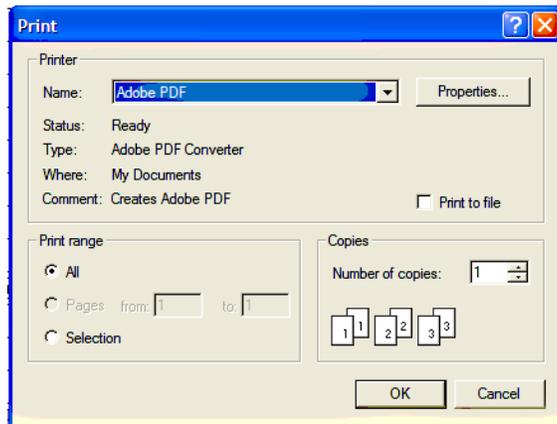
8 In the **Print Weekend Color** box, do one of the following:

- a) Place a check in the check box to have weekends print in color ink.
- b) Clear the check box to use black ink only.

9 In the **Print Colored Time Ranges** box, do one of the following:

- a) Place a check in the check box if you want the time bars to print in the color displayed in the work area.
- b) Clear the check box to use black ink only.

10 Click **Next**.



11 Select the appropriate Print output for your store printer setup.

12 Click **OK** to accept the changes and exit the screen. **Cancel** exits the screen without changes. **Apply** saves the changes without exiting the screen.

# SMP Maintenance

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## SMP Security – Program Access

The SMP application requires a security logon to enable access to the program. This feature allows the system administrator to create security levels or permission groups, with each group having its own permissions within the application. All SMP machines are configured for Cold Stone with several **standard permission groups**:

<b>Administrators:</b>	Should not be used (very high level access only by ADs)
<b>Franchisee:</b>	Used for top level access, with most functions
<b>Store Manager:</b>	Used for top level access, with many functions
<b>Shift Manager:</b>	Used for mid level access, with some functions
<b>Crew:</b>	Used for low level access, with limited functions

*Note: Cold Stone Stores are NOT able to create new groups, but they are able to create new users, moving them into any group that is available.*

## SMP Groups and Users

Security groups define specific program features. Groups are used to assign many users to the same primary set of rules (called global permissions). A user is given membership to a group. A user may use all of the features assigned to the group, but can only be given additional privileges if those functions have been added for that specific user (called custom permissions).

When creating new users, assign users to the lowest security group permissible. If the user's need exceeds the permissions of the group, add additional features as needed. If a user is promoted or is in need of high-level permissions, move the user up to the next group. Although it is always the best practice to log off of SMP when leaving the machine, the software will automatically **time out** and log off the current user after several minutes of inactivity.

## Create a New User Login

- 1 In the System Manager Window, double click on Security.
- 2 Click New User Button.
- 3 Select the group to which user will belong (manager, shift leader, crew, etc.).
- 4 Add new user login and identity information.
- 5 Click the checkboxes to select which features to enable (features above the group level will be ignored).
- 6 Click OK button to save and close.

- 7 Logout of SMP and login again to test the new user login – Make sure to examine all of the program permissions.
- 8 **DoNotTouch** is a user account accessed by technical support vendors for remote administrative support. This account should never be changed, moved, or deleted.

## Edit Tax Tables

Use the Tax Tables to program all sales taxes in accordance with your state laws. You can set up a tax that uses a straight percentage, table, or combination of both. Kahala locations will use a straight percent table as outlined in this topic.

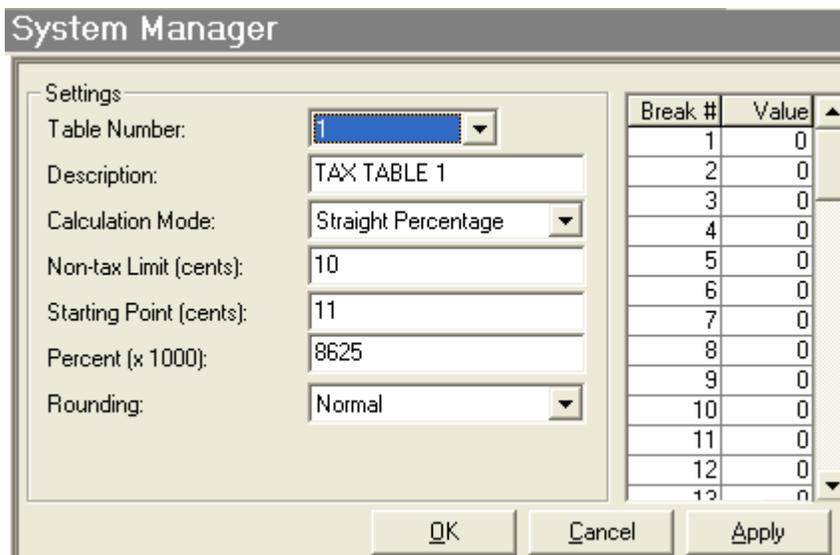
1 To program your tax tables, do one of the following:

- a) Select **System** from the menu bar.
- b) Select **Workstation Programs**.
- c) Select **System Setup**.
- d) Click on **Tax Tables**.

OR

- a) In the System Manager window, Double Click **Tax Tables**.

The following dialog box appears:



The screenshot shows the 'System Manager' dialog box. On the left, there is a 'Settings' section with the following fields: 'Table Number' (dropdown menu showing '1'), 'Description' (text box containing 'TAX TABLE 1'), 'Calculation Mode' (dropdown menu showing 'Straight Percentage'), 'Non-tax Limit (cents)' (text box containing '10'), 'Starting Point (cents)' (text box containing '11'), 'Percent (x 1000)' (text box containing '8625'), and 'Rounding' (dropdown menu showing 'Normal'). On the right, there is a table with two columns: 'Break #' and 'Value'. The table contains 12 rows, each with a break number from 1 to 12 and a value of 0. At the bottom of the dialog box, there are three buttons: 'OK', 'Cancel', and 'Apply'.

Break #	Value
1	0
2	0
3	0
4	0
5	0
6	0
7	0
8	0
9	0
10	0
11	0
12	0

- 2 Click  In the **Table Number** box.
- 3 Select tax table 1 or 2 from the list (Tables 3 and 4 are not used by your program).
- 4 Enter a description in the **Description** box.

- 5 Click  in the **Calculation Mode** box and then select **Straight Percentage** from the list.
- 6 In the **Non-tax Limit** box, enter the highest amount not taxed.  
For example, if the first penny of tax is added at eleven cents (\$.11), you would enter 10 (for ten cents) in this box.
- 7 In the **Starting Point** box, enter the first amount to be taxed.  
For example, if the first penny of tax is added at eleven cents (\$.11), you would enter 11 here.
- 8 In the **Percent (x1000)** box, enter the actual tax rate, multiplied by 1000.  
For example, if you are programming a 8.625% tax rate, enter 8625; for a 7.0% rate, enter 7000.
- 9 In the **Rounding** box, click , and then select the rounding method to use. The following rounding methods are available:
  - a) **Normal (5/4)** rounding if you want fractions less than .5 to round down and fractions greater than .4 to round up to the nearest whole number.
  - b) **Round Up** if you want fractions to round up to the nearest whole number.
  - c) **Round Down** if you want fractions to round down to the nearest whole number.
- 10 When programming a straight percentage tax rate, use the **Break List** to enter the “upper break” points (exceptions) as specified by your local government regulations.
- 11 To update the entries, click **OK** to accept all changes and exit the screen.
  - a) Click **Cancel** to exit the screen without saving changes.
  - b) Click **Apply** to save changes without exiting the screen.



*Remember that you must download all changes before they become available on the workstation. See the download procedures under SMP Maintenance, Download to Registers.*

If you are using a Table or Table with a Percent (Table %), replace the previous steps with the following steps:

- 1 Click  in the **Calculation Mode** box and then select **Table or Table %** from the list.
- 2 In the **Non-tax Limit** box, enter the highest amount not taxed.  
For example, if the first penny of tax is added at eleven cents (\$.11), you would enter 10 (for ten cents) in this box.

- 3 The **Gross Tax** and **Gross Amount** boxes work together to speed up tax calculations. In the **Gross Tax** box, enter the sales tax added to ten dollars (\$10.00). For example, if seventy cents of sales tax is added to \$10.00, enter 70 here.
- 4 In the **Gross Amount** box, enter 1000 (for ten dollars \$10.00).

The screenshot shows a dialog box with the following fields and a table:

- Table Number: 1
- Description: (empty)
- Calculation Mode: Table or Table %
- Non-tax Limit: (empty)
- Gross Tax: (empty)
- Gross Amount: (empty)
- Rounding: Down

Break #	Value
1	10
2	4
3	13
4	14
5	13
6	13
7	14
8	13
9	13
10	14
11	13
12	13
13	14
14	13
15	13
16	23

- 5 In the **Rounding** box, click , and then select the rounding method to use.

The following rounding methods are available:

- a) Select **Normal** (5/4) rounding if you want fractions less than .5 to round down and fractions greater than .4 to round up to the nearest whole number.
- b) Select **Round Up** if you want fractions to round up to the nearest whole number.
- c) Select **Round Down** if you want fractions to round down to the nearest whole number.

- 6 Do one of the following:

- a) When programming a table with percent calculation, use the **Break List** to enter the upper break points (exceptions) as specified by your local government regulations.

The system uses the **Gross Amount** and **Gross Tax** entries to calculate the tax to the nearest dollar of the sale. It then refers to your entries in the Break List to calculate the additional tax. The following illustration shows an example of how to program the break list.

Break #	Value
1	10
2	33
3	48
4	58
5	83
6	0
7	0
8	0
9	0
10	0

This example is based on a sale of \$5.36, taxable at 7.25%, with break points (exceptions) programmed as shown in this example Break List. In the Percent w/Table tax calculation, the system first calculates the tax on the whole dollar:  $\$5.00 \times 7.25\% = \$0.3625$ . If you selected the 5/4 rounding method, this amount is rounded to \$0.36. The system then refers to the break points you programmed, which, in this example, adds another \$0.04. This brings the total tax for this order to \$0.40.

- b) When programming the tax table calculation, use the **Break List** to enter the upper break points (exceptions) and repeats defined by your local government.

In a standard tax table, each penny of tax is assigned to a specific break point. For example, the first penny of tax might be added to 11 cents, the second to 33 cents, etc. Each table usually has non-repeating break points that do not have a particular pattern. However, most often the break points start to repeat at a certain point.

The following illustration shows the non-repeating exceptions pertaining to the first dollar of a sale in Lines 1-5. Line 6 signals the start of a repeat pattern. Lines 7-12 show the pattern for the second and all subsequent dollars of sale, and Line 13 signals the end of the pattern. The system repeats Lines 7-12 for each subsequent dollar of sale. You must enter 9999 to signal the start and end of a repeat pattern.

Break #	Value	SALE AMOUNT		Sales Tax		
		LOWER BREAK	UPPER BREAK		SALE AMOUNT	Sales Tax
1	10	\$0.00 -	\$0.10	\$0.00		
2	33	\$0.11 -	\$0.33	\$0.01		
3	48	\$0.34 -	\$0.48	\$0.02		
4	58	\$0.49 -	\$0.58	\$0.03		
5	83	\$0.59 -	\$0.83	\$0.04		
6	9999	9999 Start of Pattern				
7	114	\$0.84 -	\$1.14	\$0.05	\$1.84 -	\$2.14
8	116	\$1.15 -	\$1.16	\$0.06	\$2.15 -	\$2.16
9	133	\$1.17 -	\$1.33	\$0.07	\$2.17 -	\$2.33
10	148	\$1.34 -	\$1.48	\$0.08	\$2.34 -	\$2.48
11	158	\$1.49 -	\$1.58	\$0.09	\$2.49 -	\$2.58
12	183	\$1.59 -	\$1.83	\$0.10	\$2.59 -	\$2.83
13	9999	9999 - End of Pattern				

- 7 To update the entries, click **OK** to accept all changes and exit the screen.
  - a) Click **Cancel** to exit the screen without saving changes.
  - b) Click **Apply** to save changes without exiting the screen.

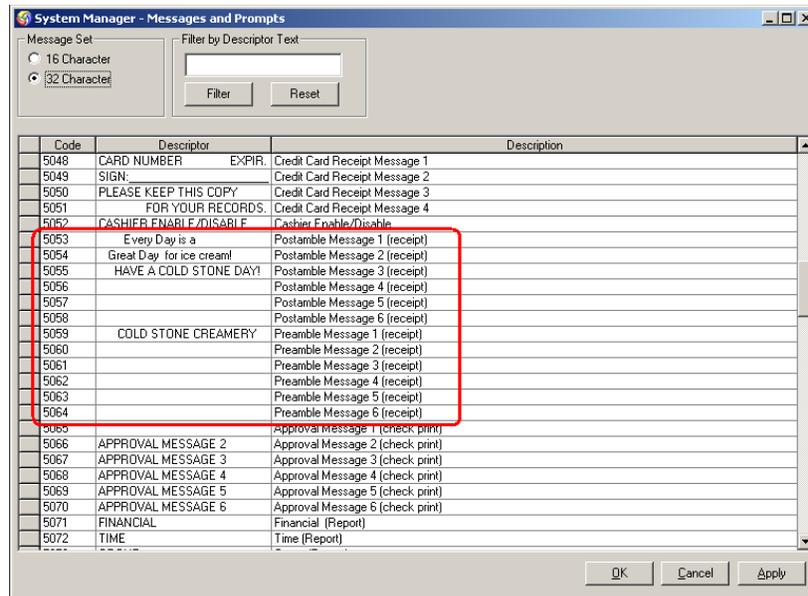


*Remember that you must download all changes before they become available on the workstation. See the download procedures under SMP Maintenance, Download to Registers.*

## Edit Message and Prompts

Message and Prompts are messages that can be displayed on the register and receipts. When there is a concept wide change to messages and prompts, the file is sent down to your system with default values as placeholders. Some values that will need to be changed, like a placeholder for the phone no. xxx-xxx-xxxx. You need to know how to update this file so your phone number and address are displayed correctly on the receipt.

To change your phone number or other receipt messages:



- 1 From within the System manager, click on the icon for Messages and Prompts.
- 2 Click on the 32-bit radio button (these are the values that are used on the receipt).
- 3 Scroll down to the fields for "Pre amble Message and Post amble Message" [5053-5064].
- 4 Enter Header messages in any field for Pre amble.
- 5 Enter Footer messages in any field for Post amble.
- 6 Save and close the Message and Prompts table.
- 7 Test your work at the register by ringing an item in training mode.
- 8 Print the receipt and modify if needed.

## Edit Discounts and Service Charges

Use this dialog box to enter information about the discounts and surcharges you use for customer transactions. You have a combination of ten Percentage Discounts and Surcharges available, or all 10 may be used for discounts or all for surcharges.

A discount is defined by using the minus (-) symbol in front of the percent value, when used in a transaction the value will SUBTRACT from the order amount. When a minus symbol does not exist the amount is a surcharge that is ADDED to the value of the transaction.

There are actually two tables available for programming, a Percent table and an Amount table.

1 To program discounts and surcharges, do one of the following:

- a) Select **System** from the menu bar.
- b) Select **Workstation Programs**.
- c) Select **System Setup**.
- d) Click on **Discounts and Service Charges**.

OR

- a) In the System Manager window, Double Click **Discounts and Service Charges**.

The following table appears:

System Manager														
Show Table														
<input checked="" type="radio"/> Percent <input type="radio"/> Amount														
	ID	Percent	Open	Over Ride	SBTL	DCTL	Item	Mgr Comp	Link PLU	Add NSTL	Tax 1	Tax 2	Tax 3	Tax 4
▶	1	-50	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2	-100	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3	-10	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4	-10	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5	-10	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	6	-15	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	7	-50	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	*		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 In the **Show Table** group, click **Percent**.



*In these procedures we will define the program for a Percent table. If you need to program an Amount table you can use the same procedures while identifying the values with an amount instead of a percentage.*

- 3 Do one of the following:
  - a) If you have not already used all ten discounts or surcharges, click in the first available blank **Percent** field.
  - b) The system automatically adds a new blank line if the limit has not been reached.
  - c) If you have already used all ten discounts or surcharges, select an existing line that may have become obsolete.
  
- 4 In the selected **Percent** field, do one of the following:
  - a) Enter the discount percentage, *preceded by a minus sign (-)*. For example, if you are programming a 10% discount, enter -10.00 for programming a *preset* discount.
  - b) Enter the percentage *without the minus symbol (-)* if you are programming a *preset surcharge*. For example, for a 15% surcharge, you would enter 15.00.
  - c) Enter **0.00**, if you are programming an *open* discount or surcharge.
  
- 5 In the **Open** box, do one of the following:
  - a) If you are programming a *preset* discount or surcharge, *clear* the check box.
  - b) If you are programming an *open* discount or surcharge, place a *check* in the check box.
  
- 6 In the **Over Ride** box, do one of the following:
  - a) If a cashier *can override* a preset percentage, place a *check* in the check box. For example, if you set the option for a 50% Discount key, a cashier can enter 2500 to register a 25% for the key.
  - b) If the cashier *cannot override* the preset percentage, *clear* the check box.
  
- 7 In the **SBTL** box, do one of the following:
  - a) If you are programming a *Subtotal* Discount or *Subtotal* Surcharge, place a *check* in the check box.
  - b) If this percentage does not apply to an entire transaction subtotal, *clear* the check box.
  
- 8 In the **DCTL** box, do one of the following:
  - a) If you are programming a *DCTL* (Discount Total Key Required), place a *check* in the check box.
  - b) If this amount does not apply to all registered items *programmed to be discountable*, *clear* the check box.

**9** In the **Item** box, do one of the following:

- a) If you are programming an *Item Discount* or *Item Surcharge*, place a *check* in the check box.
- b) If the discount or surcharge does not apply to one item at a time, *clear* the check box.

**10** In the **MGR Comp** box, do one of the following:

- a) If this percentage *requires manager approval*, place a *check* in the check box.
- b) If *manager approval is not required* or if you are programming an item discount or surcharge, *clear* the check box. Item discounts and surcharges cannot require manager approval.

**11** In the **Link PLU** box, do one of the following:

- a) If you want the percentage to *update* Product Mix and PLU report totals, place a *check* in the check box.
- b) If this percentage should *not update* Product Mix and PLU totals, *clear* the check box.

**12** In the **Add NSTL** box, do the following:

- a) If you want the percentage to *update* Net Sales (NSTL), place a *check* in the check box. (This is the default setting for Cold Stone programs.)
- b) *Clear* the check box if the percentage should *not update* Net Sales.

**13** In the **Tax 1**, **Tax 2**, boxes:

- a) Place a check in all boxes that represent sales tax to be adjusted by this discount or surcharge. If a *check* appears, discounts will reduce tax and surcharges will increase tax. (Tax 3 and Tax 4 are not used in your program.)

**14** To update the entries, click **OK** to accept all changes and exit the screen.

- a) Click **Cancel** to exit the screen without saving changes.
- b) Click **Apply** to save changes without exiting the screen.



*Remember that you must download all changes before they become available on the workstation. See the download procedures under SMP Maintenance, Download to Registers.*

## Edit Menu Item Prices

1 To program Menu Item prices, do one of the following:

- a) Select **System** from the menu bar.
- b) Select **Workstation Programs**.
- c) Select **Menu Setup**.
- d) Click on **Menu Items**.

OR

a) In the System Manager window, Double Click **Menu Items**.

2 From the **Item Selection** options:

- a) Select the **View** and **Sort** options to display the items by different combination groupings.
- b) Enter a **keyword** in the search box to start an incremental search. If you **Sort by ID**, you will be able to search by PLU number.

The screenshot displays the 'System Manager' application window. On the left, the 'Item Selection' pane shows a list of menu items, with 'BAN SPLT (1700)' highlighted. The main window is titled 'Menu Item — 1700' and contains several tabs: 'Price', 'Tax', 'Coupon', 'Major & Minor', 'Product Mix', 'Tandem', 'RB Steering', 'Class Match', 'KVS', and 'Others'. The 'Price' tab is selected, showing the following options and fields:

- Price** section:
  - Preset: Item Prices can be Preset or Open. If an item has a Preset price then that price will appear when this item is selected. An Open priced item does not have a set price, so the cashier must enter the price when the item is selected.
  - Open
  - Use Only Price 1: Select this option if the item has only one price. When this box is checked then the system will always uses the value entered into Price 1.
- Price Levels** section:
  - Price: \$4.59
  - Price 2: 0.00
  - Price 3: 0.00
  - Price 4: 0.00

Each item may have a price for each of the four Active Price Levels. This enables price differences for breakfast, lunch, dinner, or other time periods. The Active Price Level can be selected at the workstation or at the System Manager.

Buttons at the bottom: OK, Cancel, Apply, New, Delete.

3 Select the **Preset** option, located on the **Price** tab if:

- a) This item has a set price, from \$.00 to \$9999.99.
- b) You plan to program a price in any of the **Price 1-Price 4** fields.

- 4 Select the **Open** option, located on the **Price** tab if:
- a) This item does not have a set price, so the cashier must enter a dollar amount. For example, you might have a MISC food key that cashiers can use to register the price for an item not programmed into the system.

- 5 In the **Use Price 1** box:
- a) Select this option if this item has only one price. If you select this option and you change the workstation program to apply price level 2 to all transactions, the items not checked to **Use Price 1** will ring at price 2. Items checked to **Use Price 1** will continue to ring that item price at the amount defined in the price cell.

- 6 Enter **Price 1-4**
- a) Each menu item can have up to four prices to handle breakfast, lunch, dinner, or other menu price differences. The active price level can be selected at the workstation or at the System Manager.
  - b) If this item has only one price, enter its price in the **Price 1** field. You can enter \$.00 to \$9999.99.



*You can enclose the amount in brackets ( ) when the price is to reflect a negative amount.*

- 7 Repeat steps as needed to change prices on additional menu items.
- 8 To update the entries, click **OK** to accept all changes and exit the screen.
- a) Click **Cancel** to exit the screen without saving changes.
  - b) Click **Apply** to save changes without exiting the screen.



*Remember that you must download all changes before they become available on the workstation. See the download procedures under SMP Maintenance, Download to Registers.*

## Edit Menu Item Descriptors for Coupons

- 1 In the System Manager window, Double Click on **Menu Items**.
- 2 From the **Item Selection** options:
  - a) Select the **View** and **Sort** options to display the items by different combination groupings.
  - b) Enter a **keyword** in the search box to start an incremental search. If you **Sort by ID**, you will be able to search by PLU number.

The screenshot shows the 'System Manager' window. On the left, the 'Item Selection' pane shows a tree view with 'COUPON' expanded and '1 (CRM CARD)' selected. The main configuration area for 'Menu Item-1' shows 'Description' and 'KVS Description' both set to 'CRM CARD'. The 'Price' section has 'Preset' selected, 'Use Only Price 1' checked, and Price 1 set to '\$4.69'. Other price levels (Price 2, 3, 4) are set to 0.00. The 'Type' section has 'Regular' selected. Buttons for OK, Cancel, Apply, New, and Delete are at the bottom.

- 3 Click in the **Description** field.
- 4 Enter **Description** information.
- 5 Repeat steps as needed to change descriptions on additional menu items.
- 6 To update the entries, click **OK** to accept all changes and exit the screen.
  - a) Click **Cancel** to exit the screen without saving changes.
  - b) Click **Apply** to save changes without exiting the screen.



*Remember that you must download all changes before they become available on the workstation. See the download procedures under SMP Maintenance, Download to Registers.*

## Add or Edit Cashiers

Tip: Adding a cashier name for a new employee is typically done before creating a new employee profile. The cashier name can then be selected from the cashier pull down menu, and assigned to the employee.

7 Do one of the following:

- c) Select **System** from the menu bar.
- d) Select **Workstation Programs**.
- e) Select **Cashier/Manager**.
- f) Click on **Cashiers**.

OR

- g) In the System Manager Program window, Double Click **Cashiers**.

The following table appears:

System Manager					
	Cashier ID	Cashier	Cashier Code	Drawer	Enable
	1	Dawn	1	1	<input checked="" type="checkbox"/>
	2	Damien	2	1	<input checked="" type="checkbox"/>
	3	Mike	3	1	<input checked="" type="checkbox"/>
	4	John	4	1	<input checked="" type="checkbox"/>
	5	Jill	5	1	<input checked="" type="checkbox"/>
	6	Jack	6	1	<input checked="" type="checkbox"/>
	7	Jane	7	1	<input checked="" type="checkbox"/>
	8	Rose	8	1	<input checked="" type="checkbox"/>
	9	Tom	9	1	<input checked="" type="checkbox"/>
	10	Karen	10	1	<input checked="" type="checkbox"/>
*					<input type="checkbox"/>

225 Cashiers Allocated

8 In the **Cashier ID** column, do one of the following:

- h) Locate and select an unused field.
- i) Enter a cashier ID.
- j) Locate and select an **obsolete** cashier that you can overwrite.



*If you have 50 cashiers allocated in memory, you can use a number from 1-50 that has not been used yet.*

**9** In the **Cashier Name** field enter a name to identify this cashier.

**NOTE:** *Using obsolete cashier codes is permitted, but never **update** an **old** cashier number with new information unless the old cashier has been disabled as an employee or has been removed from the system. This safeguard will prevent cashier report history of 2 different individuals from being combined.*

In the **Cashier Code** field enter a code number for this cashier (up to 6 digits). It is recommended to use the same number as the Cashier ID.

**10** In the **Drawer** field, enter the drawer this cashier will use. If your workstations use only one drawer, you must select drawer 1. You should select a zero (0) when no drawer is physically attached to the workstation. You can change this assignment at anytime if the configuration changes.

**11** In the **Enable** box, do one of the following:

- k)** Select the box if the cashier code is enabled. This allows the cashier to log on any time.
- l)** Deselect the box if the cashier code is disabled. This prohibits the cashier from logging on until a manager enables the code.

**12** Repeat steps for each cashier to add or change.

**13** To update the entries, do one of the following:

- m)** Click **OK** to accept all changes and exit the screen.
- n)** Click **Cancel** to exit the screen without saving changes.
- o)** Click **Apply** to save changes without exiting the screen.



*Remember that you must download all changes before they become available on the register. See the download procedures under SMP Maintenance, Download to Registers.*

## Add or Edit a Manager

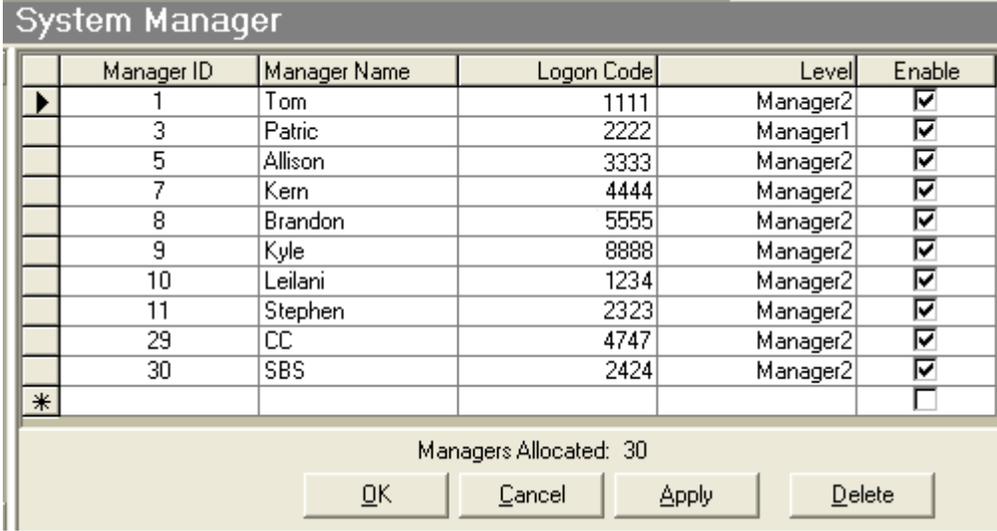
1 To open the menu screen to Add or Edit a Manager, do one of the following:

- a) Select **System** from the menu bar.
- b) Select **Workstation Programs**.
- c) Select **Cashier/Manager**.
- d) Click on **Manager**.

OR

- a) In the **System Manager** window, Double Click on **Manager**.

The following table appears:



	Manager ID	Manager Name	Logon Code	Level	Enable
▶	1	Tom	1111	Manager2	<input checked="" type="checkbox"/>
	3	Patric	2222	Manager1	<input checked="" type="checkbox"/>
	5	Allison	3333	Manager2	<input checked="" type="checkbox"/>
	7	Kern	4444	Manager2	<input checked="" type="checkbox"/>
	8	Brandon	5555	Manager2	<input checked="" type="checkbox"/>
	9	Kyle	8888	Manager2	<input checked="" type="checkbox"/>
	10	Leilani	1234	Manager2	<input checked="" type="checkbox"/>
	11	Stephen	2323	Manager2	<input checked="" type="checkbox"/>
	29	CC	4747	Manager2	<input checked="" type="checkbox"/>
	30	SBS	2424	Manager2	<input checked="" type="checkbox"/>
*					<input type="checkbox"/>

Managers Allocated: 30

OK Cancel Apply Delete

2 In the **Manager ID** column, do one of the following:

- a) Locate and select an unused field.
- b) Enter a **manager ID**.  
If you have 30 managers allocated in memory, you can use a number from 1-30 that has not yet been used.
- c) Locate and select an **obsolete** manager that you can overwrite.

3 In the **Manager Name** field:

- a) Enter a name to identify the manager.

4 In the **Manager Code** field:

- a) Enter a code number for this manager (up to 6 digits).

5 In the **Level** field click on .

- 6 Select the manager level 2 for this manager.
- 7 In the **Enable** box, do one of the following:
  - a) Select the box if the manager code is enabled.  
(this allows the manager to log on any time)
  - b) Deselect the box if the manager code is disabled.  
(this prohibits the manager from logging on until the code is enabled again)
- 8 Repeat steps for each manager to add or edit.
- 9 To update the entries, click **OK** to accept all changes and exit the screen.
  - a) Click **Cancel** to exit the screen without saving changes.
  - b) Click **Apply** to save changes without exiting the screen.

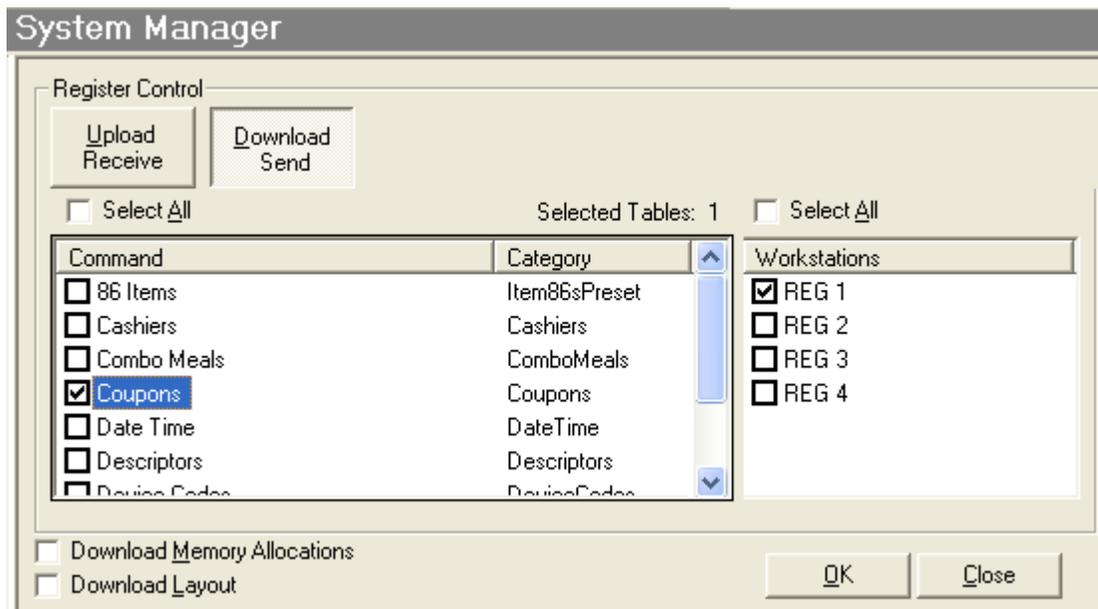


*Remember that you must download all changes before they become available on the workstation. See the download procedures under SMP Maintenance, Download to Registers.*

## Download to Registers

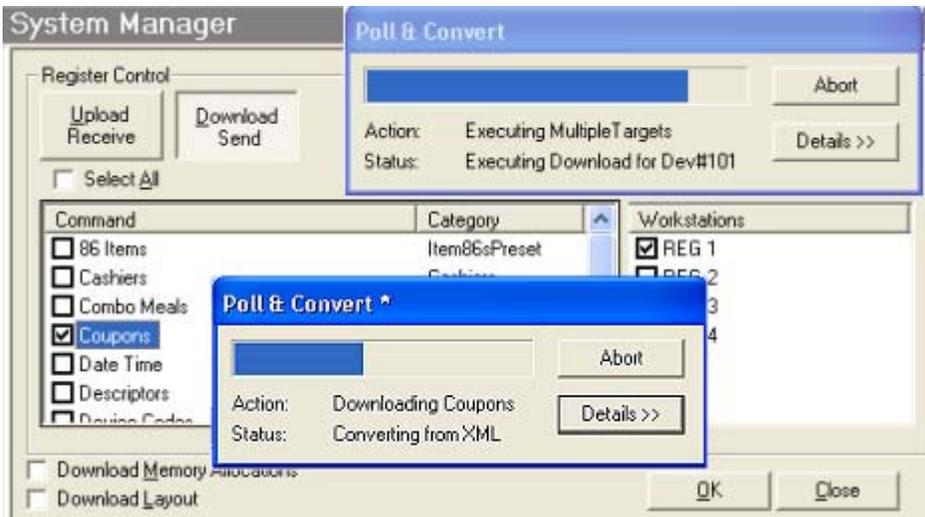
After you have completed changes in the various POS tables of SMP, you will need to download programming changes to the workstations. Follow the steps outlined below.

- 1 In the System Manager window, Double Click **Download/Upload**.
- 2 Under the **Register Control** options, Click **Download Send**.
- 3 Select the program files that you want to download to the workstations.
- 4 Select the workstations to receive the program file download.

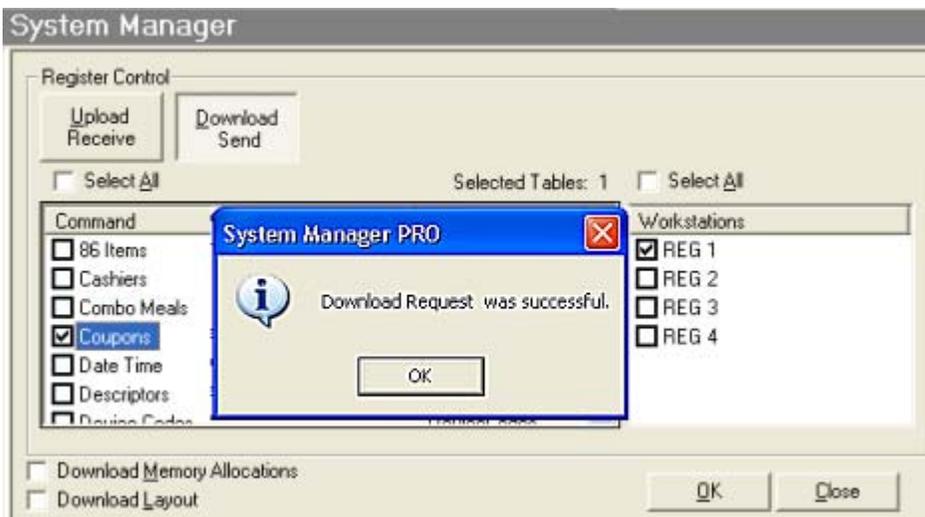


- 5 Click on **OK** to start the download process.

*Cont., next page*



- 6 After you receive a successful download message, click **OK** then **Close** to exit the menu.



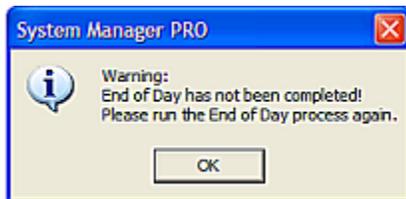
**NOTE:** Upload/Receive is never used unless requested by technical support. This feature enables you to program SMP and change program settings from a POS register. Since there is a likelihood that errors could corrupt sensitive program data, this procedure is rarely used, and should never be attempted by a typical user.

## End-Of-Day

The End-of-Day (EOD) command should rarely be used as it is scheduled to run unattended each morning at approximately 3:00 AM. It may be necessary to run the End of Day command on the occasion when the scheduled End of Day does not run successfully. Only use this function if you have confirmed that the End of Day has not run.

End-of-Day performs a series of steps to close your system at the end of a business day, and upon completion automatically performs a Start-of-Day, updating your business date and time. It is important that you run an End-of-Day after midnight, when your business is closed, but before you open in the morning.

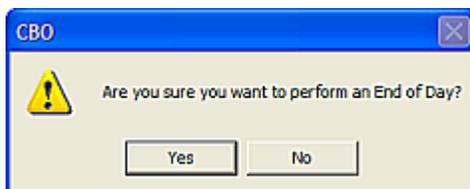
If you do not run the EOD after midnight, your business date will not be correct. All transactions for the current calendar date will be added to the business date that is displayed in the status bar. The business date will be flashing to indicate that it is out of date, and a message box displays warning that an end-of-day has not been completed.



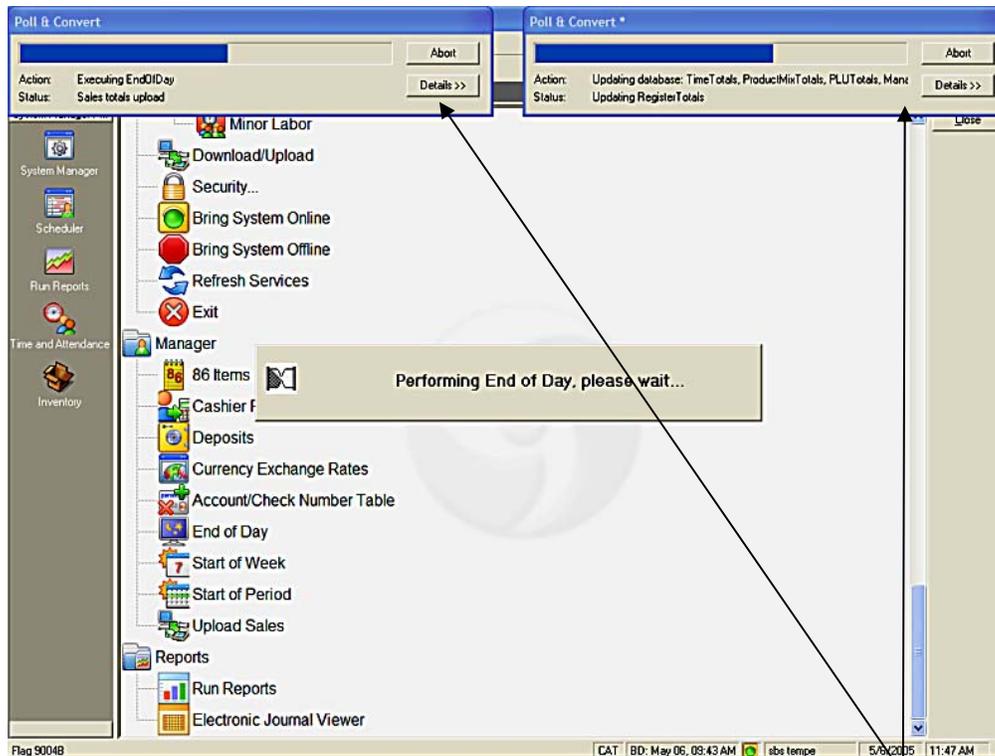
*If you press OK and do not start the end-of-day in 10 minutes, the warning will display again.*

It is recommended that you schedule your End-of-Day to run automatically at a time early in the morning when your business is closed. For example, a good time to schedule this task would be anywhere between 3:00 AM and 4:00 AM, when your business is closed and enough time is provided to complete the task before your new business day starts. This ensures that you are always on the correct business date.

- 1 To close and reopen your system manually, do one of the following:
  - a) On the Manager menu, click END OF DAY.
  - b) In the System Manager window, locate and double click on END OF DAY.
- 2 At the prompt to confirm that you really want to perform an End-of-Day, click YES to continue.



- Two Poll & Convert boxes display. The one on the right remains active during the entire process, displaying the data progress. The one on the left activates with each individual workstation.



*If you click Details, the box expands to show each action as it is performed.*

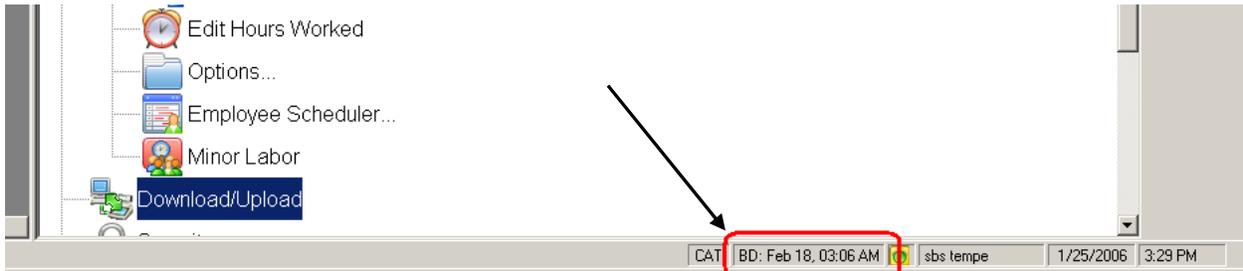
- Once you see "SUCCESS", you must click Detail again to collapse the box, followed by Close otherwise the system will not continue with the next task.
- When done, a message informs you that End-of-Day completed successfully. Click OK to exit.



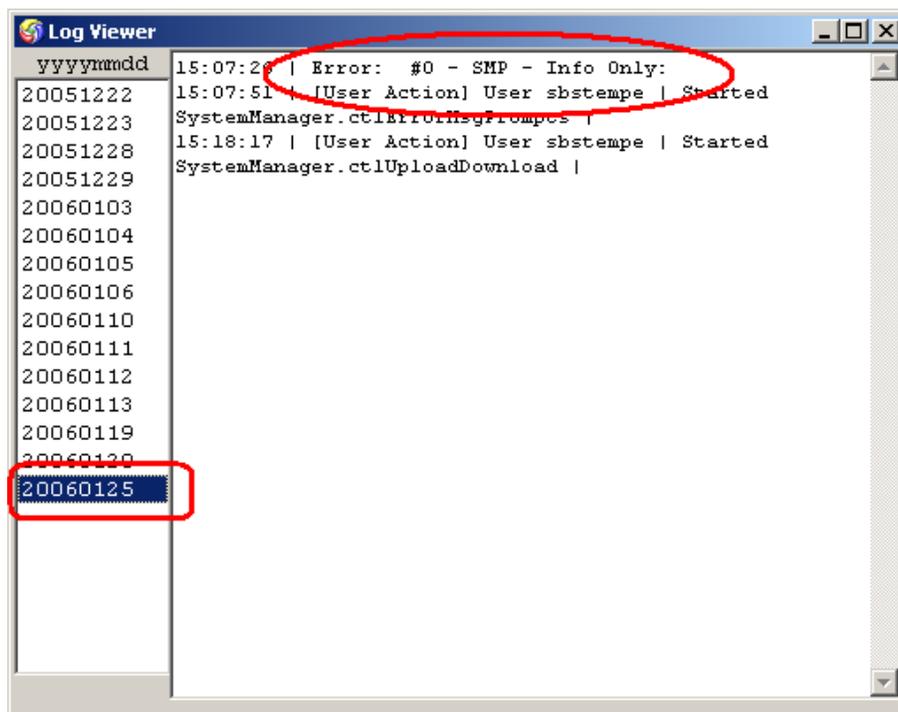
*The business date in the status bar will take a few seconds before it updates and stops blinking.*

## Troubleshooting End-of-Day

What indicators tell me if EOD has not run? A blinking date at the bottom of the application window is a quick indicator that EOD has not run for the previous business day.



You may review any errors in the script log viewer. To open the script log viewer, double click the mouse directly on the blinking date. The viewer will list the date time, and current status of the system:



## Execute a Go Live

Go Live is the term used to describe resetting all sales information in SMP back to zero before a store opens. Any testing performed during training or hardware setup can use the go live procedure to clear out SMP before the store opens for business. This should be a mandatory procedure prior to the first day of business.

How to perform a Go Live:

- 1 Open SMP and click on the System Manager Menu.
- 2 Click on the icon for Data Purge Settings.
- 3 Set the purge periods in the far right column to a value of "-1". Save and close the purge settings utility.
- 4 Run end of day manually.
- 5 Open Data Purge Settings again.
- 6 Again, set the purge periods in the far right column: set the EJ to '90" and all other items to the value of '395'.

You are now ready to begin taking sales from the register.



# SMP Reports

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## The Value of Good Business Reporting

As we know, a well-run business is reflected by its ability to lower costs, raise revenues and provide the ultimate in products and services for customers. The goal of every savvy business owner should be to develop a series of successful strategies to achieve this objective.

The power of information in your store will help you develop winning strategies and the value of your SMP system is in the information it provides and how you use it. The SMP software is a tool for getting the right information, when you need it, in order to run your store in the most cost-effective and profitable way. The software provides primary reporting for:

**Labor** – first, your store’s POS cash register serves as a time-clock by which your crew members will clock in and out. The SMP software stores that information so that you can produce a number of beneficial reports: The Labor by Employee report displays the total number of hours worked by each employee. The Time Keeper report displays the total number of hours your crew worked. The Time with Labor report displays by hour, the amount of sales you’ve made and the amount of labor cost for that time period.

**Sales Trends** – your store’s cash register and how accurately your crew member uses it can give you some amazing insight into what products are your best sellers and when. Discover if crew members are promoting waffle products or other products including recent promotions. Use this information to forecast ice cream and waffle item production needs to meet customer demands. Use the PLU (Menu item) and Register reports to help you identify trends.

**Financial Transactions** – How do you know if your crew members have an inordinate amount of No Sales reported and what could be the reason? The answer is cashier reporting. Use the Cashier Report to view individual cashier historical transactions and identify gaps in skills in order to conduct and reinforce training. Cashier reporting may indicate if crew members are not trained to operate the POS cash register properly or may be opening the cash drawer for no apparent reason (could be an indication of possible theft).

What are other great reasons to use the Cashier Report? Competition! Increase sales! Challenge your crew members to compete and see who can sell the most dipped waffle products, Love It size Creations or cakes during a two hour shift. Crew members can view their own cashier reports to see (and prove) how they did.

## Routine Procedures and Data Collection

As part of a regular routine, your store manager will perform simple procedures to ensure that data collected from the POS registers are being captured everyday without errors. The SMP software will assemble the data and organize it into useful reports according to your requirements: By Day, Prior Day, Week, Prior Week, or any specified time range within the preceding business year.

Although SMP reporting does not batch data, reports are often easier to understand if they are created and evaluated according to a normal restaurant business cycle:

- **Daily** information (Sales and Payroll cumulative for a given day)
- **Weekly** information (Sales and Payroll cumulative for a given week)
- **Period** information (A payroll period beginning every 14 days – usually Wednesday)

Since high-quality reporting is pivotal to your success, running reports for evaluation and strategic planning should be done as part of a regularly scheduled procedure, otherwise data can quickly accumulate to make business planning and projection a much bigger chore than it needs to be. The old rule of thumb regarding 'doing today's business today' holds true for every part of the administrative business process. Waiting too long to address daily or weekly administrative tasks can often make it difficult to 'catch up' and may lead to false indications for predictions of labor and sales in your store.

### How long does the business reporting data stay in the system?

The MS SQL database used by SMP will store all operational data for a period of one year on its hard drive. What is the reason for this? Once a business date is created in the system, new data will be created that will overwrite the previous year's entries for the same day. There are some instances where you may wish to adjust this to save memory and increase program performance (for example the Electronic Journal Tape is typically set to purge data after 90 days).

### Is SMP data backed up on a regular schedule?

Your data is backed up locally to a hidden file as part of the normal end of day batch routine that runs every night. In addition, your sales data is compressed and sent to Kahala every night for accurate reporting of sales. If SMP has trouble connecting to your backend SQL data source, contact your technical support vendor for troubleshooting instructions or to initiate a backup recovery of your database.

## Reports Overview

System Manager Pro displays all available reports in the Run Reports window. The window is subdivided into a tree with six major report groups:

- 1 Credit Card
- 2 Financial
- 3 Inventory
- 4 Production
- 5 Time
- 6 Time and Attendance

As you expand a group, its applicable reports display, making it easy to find any particular reports you are looking for.

## Report Output Options

Most report options are commonly available for all reports. Some are specific to the type of report you are generating. Depending on the report, the groups and their options change to suit the report.

For example, the Date Range group that is used for most reports changes to Select Week for printing Employee Time Schedules or Date Selection for Product Mix Projection reports. The following instructions include all possible groups and their options:

### Date Range Selections

- **Prior Business Date**

This option generates a report with data from the previous business date. For example, if you execute a close/open every day, this report would contain yesterday's transactions.

- **Current Business Date**

This option generates a report with all transactions since the last time you executed a system open.

- **Week-To-Date**

This option generates a report with cumulative data since the beginning of the current calendar week, starting with Sunday.

- **Month-To-Date**

This option generates a report with cumulative data since the first day of the current calendar month. For example, if today were January 15, the generated report would contain cumulative data from January 1.

- **Year-To-Date**

This option generates a report with cumulative data since January 1 of the current year.

- **Custom Date**

This option generates a report for a customizable period. In most cases, when you select this option, the From and To boxes become enabled, allowing you to specify the time range for the report. There is one exception; if you are generating a Labor Cost by Sales Time Period report, you can only report on one day at a time, therefore the **To** field remains disabled.

### Date Selection

- This group and its options are only used for the Product Mix Projection report. The group offers four dates on which you can base your product projection. The actual dates depend on the weekday you select. For example, if you select Tuesday, you can base the projection report on the previous four Tuesdays. You must select at least two weeks.

## Include on Report

- This group and its options are used only for the Product Mix Comparison report. The group offers four dates that are determined by the weekday of your current business date. For example, if the current business date is a Friday, your date choices will be the four previous Fridays. Select one or more dates to use for product mix comparison.

## Select Week

- This group contains only one option, which is used exclusively for printing the Employee Time Schedule. Click, and then select any date from the calendar that falls within the week for which you want to print this schedule. If you programmed your first day of the week to be Sunday, the schedule would run from Sunday through Saturday of that week.

## Other Options

- **Zero Suppression**

Select this option if you do not want to include zero totals on the report. Some reports do not allow you to deselect this option.

- **Select a Report Template**

This option was designed exclusively for Actual vs. Theoretical reports, which is not used at this time.

- **Product Mixes**

This group and its options are used exclusively for Product Mix Comparison, Product Mix Projection, and Product Mix Sales reports. To select your output options, do one of the following:

- If you want to include all product mix groups, select **All**, if it is not already selected.
- If you want to include most of your product mix groups, select **All**, and then deselect the product mix groups you do not want to include.
- If you want to include only a few product mix groups, deselect **All**, and then select the applicable product mix groups.

- **Select Job Code(s)**

This group displays when you select to print an Employee Time Schedule or a Time Keep Report by Job Code. To select the job codes for these reports, do one of the following:



*By default, **All** is selected and all job codes are checked.*

- If you want to include all job codes in the schedule or report, do nothing.

- If you want to include most job codes, leave **All** checked, and then deselect the job codes you do not want to include in the output.
- If you want to limit the output to a small number of job codes, deselect **All**, and then select the job codes you want to include in the output.

- **Select Employee(s)**

This group and its options are used for the Time Keep by Employee report. To select your output options, do one of the following:

- If you want to report on all employees, select **All**, if it is not already selected.
- If you want to report on most of your employees, select **All**, and then deselect the employees you do not want to include.
- If you want to report on only a few employees, deselect **All**, and then select the applicable employees.

- **Cashiers**

This option is used exclusively for the Cashier Totalizer report and offers two possible choices. Do one of the following:

- To print a report for all cashiers, select **All Cashiers**.
- To print a report for a cashier report, select the applicable cashier from the list.

- **Managers**

This option is used exclusively for the Manager Totalizer report and offers two possible choices. Do one of the following:

- To print a report for all managers, select **All Managers**.
- To print a report for a single manager, select the applicable manager from the list.

- **Destinations**

When this option is available, do one of the following:

- To report on all available programmed destinations, select **All**.
- To report for a specific destination or individually selected destinations, select the applicable destination(s) in the check box.

## Destination

- **Screen**

Select this option if you want to display the report on your PC monitor in System Manager Pro.

- **Printer**

Select this option if you want to send the report directly to your default printer.

- **File**

This option allows you to store the selected report to a file. To save a report to file, do the following:

- In the **Format** group, select the file format (ASCII or HTML).
- Select all other applicable report options, and then click OK.
- The **Save As** window displays. Select the path and edit the file name, if necessary, and then click Save.

## Format

- **ASCII**

Select this option to save the selected report in ASCII format.



This format will look most like your current register report.

- **HTML**

Select this option to save the selected report in HTML format.

**Run the following reports:**

**Financial Reports**

- Major Group report
- Minor Group report
- Cashier report
- Manager Totalizer report
- Register Totalizer report

**Time Reports**

- Labor cost by sales time period

**Time and Attendance**

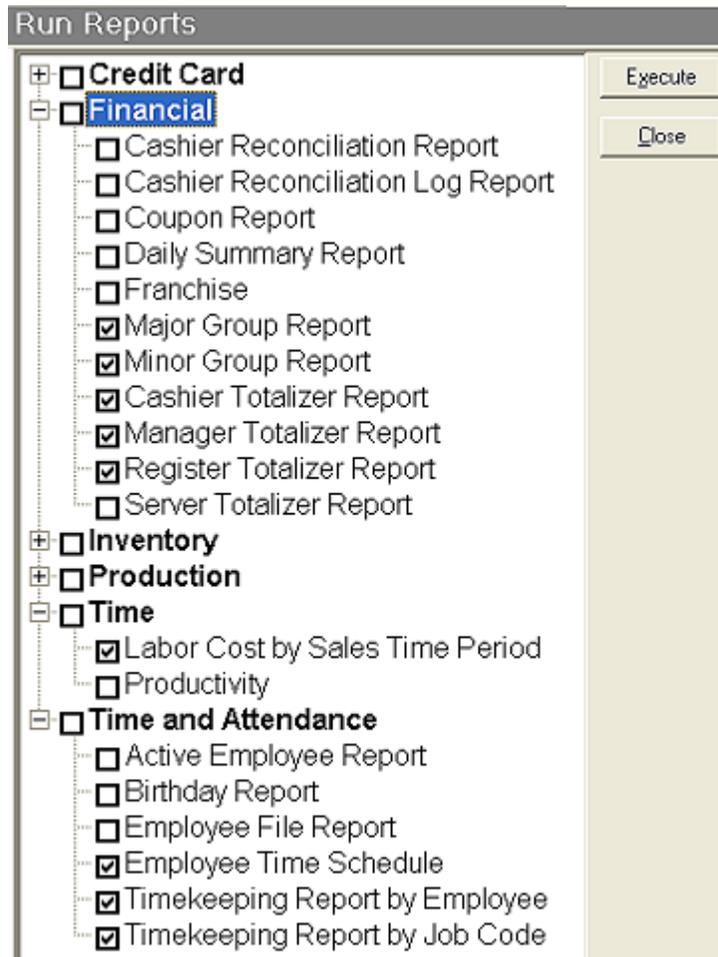
- Employee time schedule
- Time keep report by employee
- Time keep report by job code

1 Click **Run Reports** on the Program bar.



*You can do this with or without the System Manager window open.*

The following window opens:



2 Do one of the following:

- a) To generate one or more reports, individually select the report(s) you want to generate (You must click directly in the check box.); **OR**
- b) To generate all the reports in a report group, click in the group check box. This automatically selects all reports in this group.

3 Click **Execute**.

## Sample SMP Reports

The following pages show examples of just some of the reports that are available through the System Manager Pro (SMP) back-office application.

Reports may suppress zero totals so not all programmed totals may display in the examples. Some reports have been shortened or modified to fit the page.

## Financial Reports

### Major Group Report

Report Execution Date: Jul 19 2007 02:48:08 PM  
Stores: 7900  
Beginning Date: Jun 13 2007 12:00 AM  
Ending Date: Jul 19 2007 02:49 PM  
Zero Suppression: 1

### Store 7900

ID	Description	Count	Promo	Waste	Total	Sale %
1	BEVERAGE TTL	2	0	0	8.58	5.24
2	CAKE / PIE TTL	3	0	0	94.97	58.01
7	OTHER	5	0	0	10.00	6.11
8	PACKAGE TTL	4	0	0	30.96	18.91
10	RETAIL	2	0	0	0.00	0.00
11	SPECIALTY TOTAL	1	0	0	3.99	2.44
12	WFL PLAIN TTL	1	0	0	0.59	0.36
13	LIKE IT TTL	1	0	0	2.19	1.34
14	MIX IN TTL	4	0	0	2.76	1.69
16	KID TTL	1	0	0	1.69	1.03
17	LOVE IT TTL	2	0	0	5.38	3.29
18	GOTTA HV TTL	1	0	0	2.59	1.58
TOTAL		27	0	0	163.70	

## Minor Group Report

Report Execution Date: Jul 19 2007 02:48:29 PM  
 Stores: 7900  
 Beginning Date: Jun 13 2007 12:00:00 AM  
 Ending Date: Jul 19 2007 02:49:28 PM  
 Zero Suppression: 1

### Store 7900

ID	Description	Count	Promo	Waste	Total	Sale %
1	SHAKE / MALT	1	0	0	4.29	2.62
2	SMOOTHIE	1	0	0	4.29	2.62
6	LG REC SIG	1	0	0	40.99	25.04
10	MD RND SIG	1	0	0	26.99	16.49
12	SM RND SIG	1	0	0	26.99	16.49
21	GOTTA HV ISB	1	0	0	2.59	1.58
22	LIKE IT ISB	1	0	0	2.19	1.34
23	LOVE IT ISB	2	0	0	5.38	3.29
30	EVERYBODY'S	1	0	0	10.99	6.71
31	MINE	2	0	0	11.98	7.32
32	OURS	1	0	0	7.99	4.88
37	TOYS	2	0	0	0.00	0.00
43	SUNDAE	1	0	0	3.99	2.44
49	PLN BOWL ISB	1	0	0	0.59	0.36
54	MAW	5	0	0	10.00	6.11
57	KID ZONE ISB	1	0	0	1.69	1.03
69	REG MIX IN ISB	4	0	0	2.76	1.69
TOTAL		27	0	0	163.70	

## Cashier Totalizer Report

Report Execution Date: Jul 19 2007 02:48:45 PM  
 Stores: 7900  
 First Cashier: 0  
 Zero Suppression: 1  
 Beginning Date: Jun 13 2007 12:00 AM  
 Ending Date: Jul 19 2007 02:49 PM  
 Last Cashier: 0

### SAMPLE

Description	Cnt	Amount
TAXABLE 1 TOTAL	2	33.83
NON-TAXABLE TTL	0	10.00
NET SALES	3	43.83
ALL VOID	1	0.00
R/A TOTAL	3	100.00
CHK AVG	0	14.61
LIKE IT ISB	1	2.19
LOVE IT ISB	1	2.39
GOTTA HV ISB	1	2.59
LLG TOTAL	3	0.00
LVGH %	0	66.67%
REG MIX IN TTL	4	2.76
MIX-IN %	0	133.33%
WFL PL TTL	1	0.59
WCDP %	0	33.33%
SHAKE / MALT	1	4.29
SMOOTHIE	1	4.29
SPECIALTY TTL	1	3.99
PACKAGE TTL	3	24.97
CAKE / PIE TTL	3	94.97
RETAIL TTL	2	0.00

## Register Totals Totalizer Report

Jul 19 2007  
 Report Execution Date: 02:49:05 PM  
 Stores: 7900  
 Zero Suppression: 1  
 Beginning Date: 12:00 AM  
 Ending Date: 02:49 PM  
 Workstation List: 101, 102

Description	Cnt	Amount
GROSS TTL	0	163.7
GROSS	0	176
GROSS - RFND	0	163.7
TAXABLE 1 TOTAL	4	153.7
NON-TAXABLE TTL	0	10
TAX TOTAL	4	12.3
SALES	0	163.7
NET SALES	5	163.7
ADJ SALES	0	176
ALL VOID	1	0
GSTAMT	0	54.28
GSTCNT	12	0
GSTAVG	0	4.52
CHK AVG	0	32.74
LIKE IT ISB	1	2.19
LOVE IT ISB	2	5.38
GOTTA HV ISB	1	2.59
LLG TOTAL	4	0
LK %	0	25.00%
LV %	0	50.00%
CH %	0	25.00%
LVGH %	0	75.00%
KID ZONE ISB	1	1.69
REG MIX IN TTL	4	2.76
MIX-IN %	0	100.00%
PLN BOWL ISB	1	0.59
WFL PL TTL	1	0.59
WFL %	0	25.00%
WCDP %	0	25.00%
SUNDAE	1	3.99
SPECIALTY TTL	1	3.99
MINE	2	11.98
OURS	1	7.99
EVERYBODY'S	1	10.99
PACKAGE TTL	4	30.96
SHAKE / MALT	1	4.29
SMOOTHIE	1	4.29
BEVERAGE TTL	2	8.58

SM RND SIG	1	26.99
MD RND SIG	1	26.99
LG REC SIG	1	40.99
CAKE / PIE TTL	3	94.97
TOYS	2	0
RETAIL TTL	2	0
OTHER TTL	5	10
PAID IN	3	100
R/A TOTAL	3	100
VISA	1	26.97
VISA+MC	0	26.97
CHARGE TOTAL	1	26.97
CASH IN DRAWER	0	249.03
CASH OWED	0	249.03
DRAWER TOTAL	0	276
EAT IN	5	163.7
DEBT TOTAL	5	163.7
3% ADV	0	4.91
6% ROY	0	9.82

## Time Sales Report



*This report provides information regarding the count and dollar value of your sales during the specified time periods. There can be 48 time periods defined, depending on the memory allocation setting. Time periods can not be overlapped.*

## Service Time Report



*This report tracks sales that fall within three specified Efficiency Levels. In this example, it reports how many orders and what percentage of orders were served in fewer than two minutes, fewer than three minutes, and fewer than four minutes. Your program defines the three Efficiency levels, as well as the time ranges reported for each destination.*

## Category Report



*The Gross Quantity counter includes Promo and Finished Waste counts. These counts are already subtracted from the Net Quantity counter.*

*This report shows sales by Major Revenue Group, by Subgroup, and by items linked to the Subgroup. The Revenue Group Grand Total provides a summary of all groups.*

## PLU Report



*For each listed item, this report shows the percentage of sales, the count sold (used), the sales, and the Promo count, as well the counts for up to four assigned price levels.*

## Cashier Report



*You can request a report of all cashiers who have worked today, a specific cashier, or a range of cashiers. The same format is used for all Cashier Reports.*

## Manager Report



*You can request a report of all managers who have worked today, a specific manager, or a range of managers. The same format is used for all Manager Reports.*

## Product Mix Report



*The time ranges on the Product Mix Report are programmable. They can be set up to track sales for varying time periods, including by quarter hour, by half-hour, and by hour. Your program decides the time ranges tracked for each Product Mix group.*

## Product Projection Report



*The time ranges and groups on this report are based on the set-up of the Product Mix Report. The report shows counts by time period for each of the four weeks, as well as the average for the time period.*

## Product Comparison Report



*The time ranges and groups on this report are based on the Product Mix Report. The Product Comparison Report shows counts by time period for each of the four weeks, as well as the average for the time period.*

## Drawer Report



*The totals on your Drawer Report depend upon the functions you are using. Your reports may vary from the examples shown above.*

## Electronic Journal Viewer

As you register transactions at the workstations, selected information is relayed to SMP. Depending on your setup, the workstations may send all transactions to the Electronic Journal or they may send only voids, negative transactions or other specific transactions. Once the data is collected, it is available in the **View Electronic Journal** dialog box. A shortcut menu is provided when you right-click in the **Search Results** window that gives you viewing, printing, and export options.



The following instructions are based on the premise that you have the **System Manager** open. To open the **System Manager** window, click on the System Manager icon on the shortcut bar or click on the **Applications** menu, point to **System Manager Pro**, and then click **System Manager**

- 1 To display the electronic journal viewer, do one of the following:
  - On the **Reports** menu, click **Electronic Journal Viewer**.
  - In the **System Manager** window, locate and select **Electronic Journal Viewer**.

The following the Electronic Journal View window opens:

**System Manager**

Range Criteria

	Start	End
Order		
Transaction		
Workstation		
Guest Check		
Date	05/09/2005	05/09/2005
Time	11:48 AM	11:59 PM

Search Criteria

Cashier: **\*\*All Cashiers\*\***  Coupons

Manager: **\*\*All Managers/Serv**  Gift Certificates

PLU: **\*\*All PLU\*\***  Promo of PLU

Dest: **\*\*All Destinations\*\***  No-Tax Order

Journal  Receipt  Training Mode

Room Charge

Show Receipts

Filter Text

Search Results

```
Store: 619 Store 619
Manager: 000
Server: 000
Cashier: 001 Tom
Trans# 001 May 09, 2005
Register 001 Mon 04:43 PM
Order# 116 TAKE-OUT
1 BT SORBT 11.29
1 LU ORIG 5.39
-----
TAX TABLE 1 1.44
Tax Total 1.44
SUBTOTAL 16.68
TAX TOTL 1.44
TOTAL 18.12
CASH 19.00
CHANGE 0.88
```

Until you perform a custom search, the displayed EJ transaction starts at the beginning of your current business date and time, and ends at one minute before midnight on the same day.

**2** To search by range, in the **Range Criteria** group, do one or more of the following:

If searching for specific sales data you can use the combination of other range/search criteria to narrow down your search.

- To display sales data based on a range of orders, in the **Order Start** field, enter the starting order number for this range. In the **Order End** field, enter the last order number in the range.
- To display sales data based a range of transactions, in the **Transaction Start** field; enter the starting transaction number for this range. In the **Transaction End** field, enter the last transaction number in the range.
- To limit the output for all range/search criteria, in the **Workstation Start** field, enter the starting workstation number for this range. In the **Workstation End** field, enter the last workstation number in the range.
- To display sales data based on a range of guest checks or phone orders, in the **Guest Check Start** field, enter the starting guest check number or phone order for this range. In the **Guest Check End** field, enter the last guest check number or phone order in the range.
- To display sales data based on a date range, in the **Date Start** field; enter the starting date for this range. In the **Date End** field, enter the ending date for this range.
- You may further limit the output by checking the **Time** box, and then entering a **Start** and **End Time** in the corresponding fields.

**3** In the **Search Criteria** group, do one of the following:

- To search by cashiers, in the **Cashier** field, click, and then select the cashier from the list or select **\*\*All Cashiers\*\***, if applicable.
- To search by managers or servers, in the **Managers/Servers** field, click, and then select the manager or server from the list or select **\*\*All Managers/Servers\*\***, if applicable.
- To search by PLU number, in the **PLU** field, click, and then select the PLU from the list or select **\*\*All PLU\*\***, if applicable.
- To search by destination, in the **Destination** field, click, and then select the destination from the list or select **\*\*All Destinations\*\***, if applicable.
- Check the applicable box to search for coupons, gift certificates, promos, no-tax orders, transactions registered in training mode or as a room charge.
- You may also search for transactions using the keyword search. In the **Filter Text** field, enter the applicable keyword.

- 4 After entering your search criteria, do one of the following:
  - Click **Search** to execute any of the above searches.
  - To display all transactions, click **All**, and then click **Search** or right-click in the **Search Result** window, and then select **View All** from the shortcut menu. Before the EJ displays all transactions, you must delete keywords and all other search criteria.
  - To scroll through transactions click on **Next** or **Prior**, you can also use the scroll bar.
- 5 To close the EJ, click **Close**.

## Printing Receipts or Exporting to File from the Electronic Journal

- 1 To print receipts or export as XML file, right-click in the **Search Result** window, and then select the applicable option from the shortcut menu.
- 2 If you choose exporting to file, the standard **Save As** window displays, enabling you to store the file with a path and file name of your choice.

## **Additional Useful Reports**

### **Day register report**

This is the Register report times 7 days. Wed – Tues with total of week. (Count by day, dollar by day, total by end of week)

### **Monthly hire report**

This report displays the new hires for a given time period.

### **Schedule variance report**

This report indicates variance times between scheduled and actual punch data (clock in/out times) and actual punch data vs. edited punch data.

# Module Five – Sales Reporting and Business Software

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## Module Five Objectives

### Sales Reporting and Business Software

Upon completion of this module, you will be familiar with:

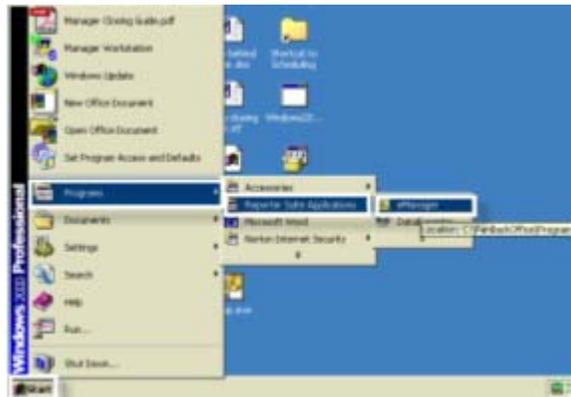
- Using Reporter Suite: eManager
- Adding a Contact in eManager
- Navigation in eManager
- Using eManager to verify Communications
- Closing eManager
- Additional Preinstalled Business Software

## Reporter Suite: eManager

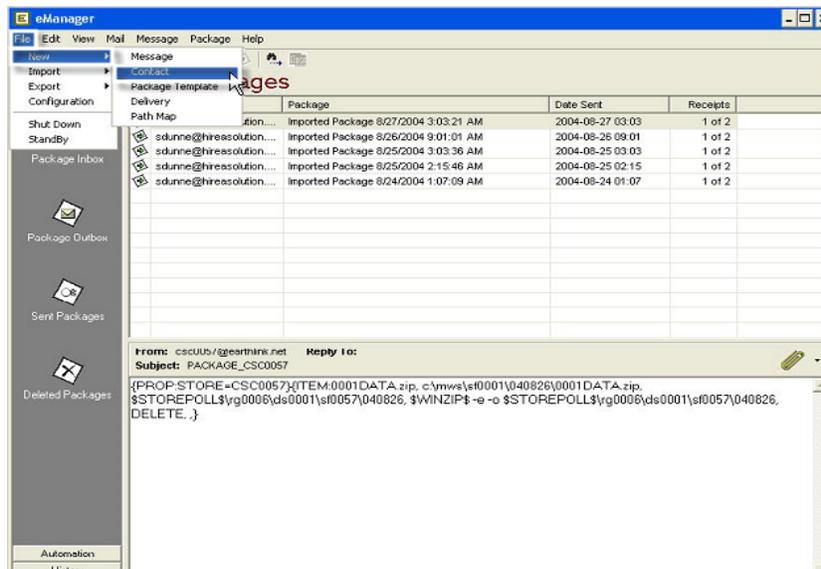
Your franchise agreement states that you are responsible for reporting your store's sales information to Kahala. You may ask, "How and when do I report financial information to Kahala?" Guess what? This happens automatically! EManager is a program that uses email to automatically transmit sales data between your store location and Kahala. Kahala will use this information to help calculate royalties for your store, so it's very important that this procedure run properly every night.

Normally, the eManager software runs an automated scheduled task that will collect your sales data (data that was batched as part of the End of Day command) and send it to Kahala in a special file format every night. This data can be imported directly into other sales reporting tools that are used by Kahala. EManager will also allow you to manually send files if the automated scheduler has failed. To start eManager:

- 1 Click **Start**
- 2 Point to **Programs**
- 3 Point to Reporter Suite Applications
- 4 Click on **eManager**



The following screen will appear:

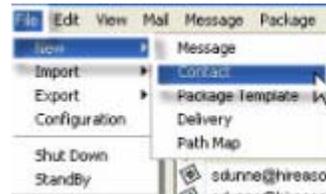


## Adding a Contact in eManager

It is normally a good idea to add yourself as a primary contact in eManager so that you can be copied on all communications sent from your store to Kahala. If eManager is running correctly, an email with a zipped file will be sent to Kahala (and to you) with a summary of your sales for the day. Adding yourself as a contact is an easy way to ensure that all communications are happening each night without errors. A missing message from the previous day is your cue to open eManager, send the package manually, and troubleshoot the problem so that it does not continue to occur.

To set up a contact:

- 1 Click **File**
- 2 Point to **New**
- 3 Point to **Contact**



The following screen will appear:

A screenshot of the 'Contact' dialog box in eManager. The dialog has a title bar with 'Contact' and a close button. It contains two text input fields: 'Name' with the text 'Luke' and 'Email Address' with the text 'lweizer@twcny.rt.com'. Below the fields is a checkbox labeled 'Default Recipient' which is checked. At the bottom are 'Cancel' and 'OK' buttons.

- 1 Enter your **Name**
- 2 Enter your Email Address
- 3 Select **Default Recipient** so your information will be sent nightly

To view the Contact list, double click on the Contact icon.

**mwsrtin@coldstonecreamery.com** and **storesales@coldstonecreamery.com** should both be set as default contacts. Both are used for backup in case of hardware failure or Internet provider issues.

## Navigation in EManager

The left vertical menu bar in eManager contains various folders used to organize messages. A message with MWS data attached is called a package. You can navigate each of the different folders in eManager by clicking into the left pane and clicking on a folder. Clicking onto a folder icon may enable other folder options to appear. The list below is a summary of each folder and how it is used:

### The Outbox

You should check your outbox periodically to see that all messages have been sent out. The outbox is a temporary storage bucket where your mail messages are held until they can be sent either automatically, or manually. If there are messages waiting in the outbox, it means they should be sent manually.

### The Sent box

The sent box shows all email packages have been sent from your computer. You may wish to review the sent box occasionally to confirm that the messages are being sent on a regular schedule.

### Package Folders

Package folders provide a method of organizing Packages based on status and type. Package Folders are found under Packages on the eManager left vertical menu bar.

### Package Inbox

Contains all received packages.

### Package Outbox

The package outbox contains all packages that have been prepared for outgoing mail; sales that have been zipped during the End of Day process. When eManager sends mail all Packages located in the Package Outbox are sent.

### Sent Packages

A copy of all packages that have been successfully delivered to the outgoing mail server are placed in the Sent Packages folder. From here you can double-click on a Sent Package to determine if it has been received by its intended recipients.

### Deleted Packages

Whenever a package is deleted, it is moved to the Deleted Packages folder.

## Data Exporter

Data Exporter is the application that prepares the sales package from MWS and exports the information to eManager. **This tool is for administrative use only and shouldn't be used.**

## Package Icons

Clicking into a folder will reveal a list of packages or "messages". Each package is represented by an icon. The color and shape of the icon indicate its status. Icons with red indicate a failure of communications, icons in green indicate success. The list below is a summary:

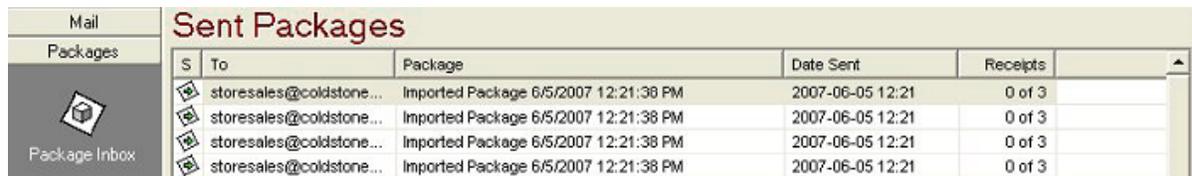
-  A received Package that is marked as "Unprocessed" (Package Inbox).
-  An outgoing Package that has not yet been sent (Package Outbox).

-  Successfully Processed Package (Package Inbox).
-  A successfully sent package (Sent Packages).

-  Failed Processed Package (Package Inbox).
-  Failed Outgoing Package (Package Outbox).

-  Imported Package (Package Outbox).
-  Imported and successfully sent Package (Sent Packages).
-  Imported and unsuccessfully sent Package (Package Outbox).

It's a good idea to check your **Sent Packages** box every night to make sure your package has been sent with current (today's date) information. It will look like this:



S	To	Package	Date Sent	Receipts
	storesales@coldstone...	Imported Package 6/5/2007 12:21:38 PM	2007-06-05 12:21	0 of 3
	storesales@coldstone...	Imported Package 6/5/2007 12:21:38 PM	2007-06-05 12:21	0 of 3
	storesales@coldstone...	Imported Package 6/5/2007 12:21:38 PM	2007-06-05 12:21	0 of 3
	storesales@coldstone...	Imported Package 6/5/2007 12:21:38 PM	2007-06-05 12:21	0 of 3

 **Kahala recommends checking on a routine basis to make sure all packages are being transmitted daily. Franchise owners who fail to report sales on a daily schedule can be charged a penalty fee in addition to their normal sales royalty.**

## Using eManager to verify communications with Kahala

Once a day you should open eManager and check your outbox to see that sales data packages are being sent to Kahala each night. **NOTE: If logged on as crew, you will not be able to perform this task.**

Open eManager

- 1 Click **Start > Programs > Reporter Suite Applications > eManager**  
If eManager is already open, there will be an E-icon in the icon tray (lower right corner of your screen - by the clock).
- 2 Click on **Packages** Tab in left pane.
- 3 Click on **Package Outbox**.

### Packages waiting in the Outbox

If there ARE packages in the package outbox, they need to be sent to Kahala:

- 1 Connect to the Internet as you normally would.
- 2 Return to eManager by clicking on the E-icon in the icon tray (lower right corner of your screen by the clock).
- 3 Click on **Mail > Get/Send Mail > Get All Mail**.
- 4 At the bottom of your eManager screen you should see the progress (i.e.: sending 1 of 5).
- 5 If you click on the screen while it is sending, you will get an error box that gives you an option to switch to or retry, click retry and let it finish the process.

If your sales packages will not send, please call the Help Desk. You can use the online Sales Reporting Tool (SRT) as a backup method to report your sales manually until automated reporting problem is resolved.

### Reviewing Packages that have already been sent

If there ARE NOT packages in the package outbox:

- 1 Click on Sent Packages.
- 2 If there is a package dated today, then your sales have been sent.
- 3 If there are no packages in the sent packages box either, please call the Help Desk.



***Tip: Kahala recommends that you set up yourself as a contact in eManager so that you are notified daily about sales packets sent to Kahala. If you are receiving sales packages to your email account on a consistent schedule, chances are good that the sales data is being sent to Kahala without error as well. Using this method allows you to monitor communications from your home email account.***

## Closing eManager

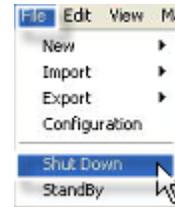
You can shut eManager down one of two ways:

- 1 Right click eManager in the icon tray



OR

- 2 Point to the **File** menu
- 3 Click Shutdown



 **NOTE:** In order for eManager to run automated tasks, it must be left running and the computer must be turned ON overnight. Emanager will startup automatically when the computer is restarted.

## **Using an Internet Service Provider**

Your internet connection is your primary method for networked communication and sales reporting to Kahala. All new stores are required to have a broadband (high-speed) connection to the internet. Store owners have the option of using their own local broadband provider for access. If broadband service is not yet available in your region, connecting to a local dial-up account to access the Internet with your modem is sufficient.

## **Using a Dial-up Account**

Using an ISP dial up account requires the installation of a second phone line to your store that can be used by the computer to access the Internet and send email. During the installation and setup of your MWS computer system, you should check to see that the dial-up number you have chosen for a local connection will NOT incur additional expense because of a toll charge to your phone bill.

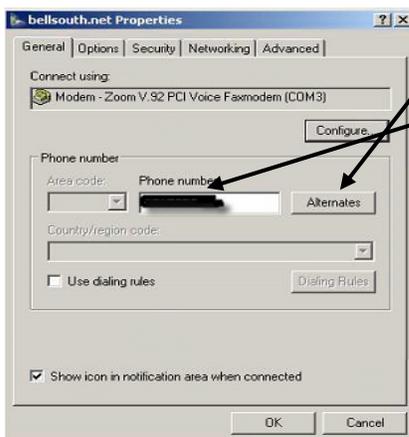
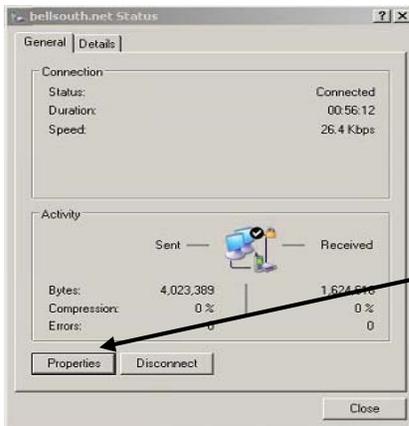
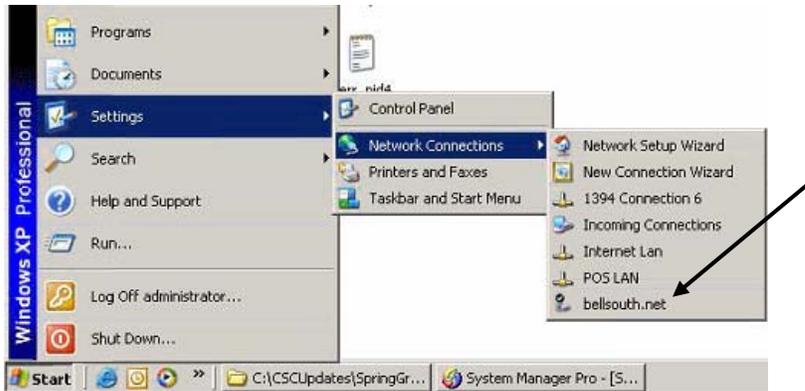
Even access numbers in your area code may result in toll, usage, or long distance charges. Please check with your local phone company to determine whether additional charges apply. You are responsible for selecting the best number for you and for all telephone fees and charges associated with the use of the telephone number you select. It is important to check this number on the dial up configuration setting prior to your store opening; otherwise you will be responsible for unnecessary long distance phone bills that could easily be avoided.

## **Checking your dial up connection**

Prior to the opening of the store, but after phone service has been established, please verify that the modem number is a non-toll number. This can be done by identifying the modem number and calling the phone company to verify. To find the modem number, please follow these steps at the back-office PC:

1 From your Windows Desktop, Click: Start > Settings > Network Connections

The dial up provider should be listed; i.e. BellSouth, Qwest, etc. Select the dial up provider.



- 2 Click **Properties** button to display **number**. Verify with the phone company that the number is a non-toll number.
- 3 Verify that there are no alternate numbers that can be dialed by clicking the **Alternates** button.
- 4 If there are other numbers listed in the alternate box, please verify with the local phone company that the numbers are non-toll numbers.

## Additional Preinstalled Software

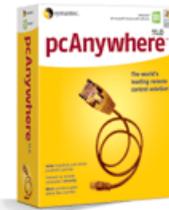
Your MWS PC comes pre-loaded with several business applications that allow you to maintain the PC and manage sales information for your store. This section discusses each application, and how each is used. With practice, you will learn to use these software tools to make your MWS a true management workstation.

## Remote Access Software

Having remote access to your PC will allow you to manage your business without being in the store! The following are two tested packages to allow you to access and control your PC remotely.

### pcAnywhere

- Connect to remote computers securely.
- Run all software applications remotely.
- Work uninterrupted while files transfer.
- This software requires you to purchase the client component for each remote location.



\*\*For details or support please contact Symantec

Software: <http://www.symantec.com/pcanywhere/Consumer/>

Support: <http://www.symantec.com/techsupp/>

### Remote Desktop

- Connect to your store computer from home and have access to all of your applications, files, and network resources as though you were in front of your computer at work.
- Comes standard with Windows XP operating system.
- Needs to be configured at both host and remote locations.

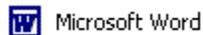


\*\*For details or support please contact <http://support.microsoft.com/>

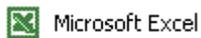
## Microsoft Office

This collection of software has all the word processing and spreadsheet power you will need everyday in your store. **Microsoft Excel** is the preferred program used by Kahala to share profitability information and it will help you arrange and organize financial data. **Microsoft Word** is world famous as word processing program but it also allows you to submit your customized marketing pieces to Kahala for expert finishing.

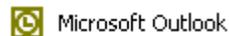
The Microsoft Office suite consists of:



Word gives you tools to easily create, share and read documents.



Excel helps you to turn data into readable information with powerful tools to analyze, communicate and share results. The output of Excel is spreadsheets.



Outlook is where you send and receive emails. It provides an integrated solution for managing and organizing e-mail messages, schedules, tasks, notes and contacts.

## Adobe Acrobat

Adobe Acrobat allows you to easily convert any electronic or paper document—even a Web site—to a reliable Adobe Portable Document Format (PDF) file for exchange and review with others:



PDF is a universal file format that preserves the fonts, images, graphics and layout of the document.

## WinZip

This program allows you to compress large files in order to send them via email.

# Module Six - The CAT System

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## Module Six Objectives

Upon completion of this module, you will be familiar with:

- Ringing a Credit Card Transaction
- Return Credit Transaction
- Tip Edit (performed at the register)
- Credit Card Batch and Settlement
- Resubmit Failed Batches
- Adding a Transaction
- Deleting a Transaction
- Performing a Deposit
- Performing a Selected Deposit
- Reports

## Register Functions

### Exact Tender

- 1 Ring Items.
- 2 Swipe credit card through the reader and wait for approval.
- 3 A “CAT Processing” message briefly displays on the register screen. If the credit card is approved, your receipts print in about 5 – 15 seconds.
- 4 Have customer sign the merchant receipt copy. Retain the merchant copy and present the other receipt to the customer.

*Merchant copies may have the complete credit card number and expiration date. The customer copies do not.*

PANASONIC 1707 N. Randall Rd. Elgin IL 60123-7847 (847)123-4567	
CYNTHIA SMITH	
TR TYPE	AUTHSALE
MERCHNT#	999999999911
ORDER#	0351
REF#	03000008
PAYMENT	AMER EXP
CARD#	XXXXXXXX12345
EXP DATE	XXXX
AUTH#	123456
<b>TOTAL</b>	<b>5.26</b>
Sign: _____	
I agree to pay the total amount according to the card issue agreement.	
1stcopy=Merchnt 2ndcopy=Customer DEBBIE S 0041 09:35 #01 JUN 11'01 REG0001	

If the credit card is denied, a “DENIED” message prints

If the reader cannot read the card information, follow the  
Manual Entry Procedures

### Split Tender

- 1 Ring Items.
- 2 Touch PAY SCREEN.
- 3 Enter amount to be applied to first credit card.
- 4 Swipe credit card through the reader and wait for approval.
- 5 “CAT Processing” message briefly displays on the register screen.
- 6 Enter amount being applied to second card.
- 7 Swipe second card through the reader and wait for approval.

- 8 If the credit cards are approved, your receipts print in about 5 – 15 seconds.
- 9 Have both customers sign the merchant copies of receipts. Retain the merchant copies and present the other receipts to the customers.

*Merchant copies may have the complete credit card number and expiration date. The customer copies do not.*

## **Manual Entry**

If you have a worn or demagnetized card, the system may not be able to read the card number or its expiration date. Use the following procedure to manually enter the card information:

- 1 Ring Items.
- 2 Touch PAY SCREEN.
- 3 Touch VISA/MASTERCARD/AMEX/DISCOVER key – dependent on type of card used.  
*The type of card keys will be listed in the MANUAL CREDIT column*
- 4 At the login screen, you will be prompted to enter the credit card number, use number keys to enter credit card number.
- 5 Touch ENTER.
- 6 At the login screen, you will be prompted to enter expiration date, use number keys to enter expiration date.
- 7 Touch ENTER.
- 8 A “CAT Processing” message briefly displays on the register screen. If the credit card is approved, your receipts print in about 5 – 15 seconds.
- 9 Have customer sign the merchant receipt copy. Retain the merchant copy and present the other receipt to the customer.  
*Merchant copies may have the complete credit card number and expiration date. The customer copies do not.*

## **Manual Authorization**

You may have to call the processing company directly for credit card approval. Use the following procedure after you call to receive authorization for the customer's charge:

- 1 Ring Items.
- 2 Touch PAY SCREEN.
- 3 Touch MANUAL AUTH.
- 4 Swipe the credit card. If card does not swipe:
  - a) Enter card number
  - b) Touch MANUAL ENTER
  - c) Enter expiration date
  - d) Touch MANUAL ENTER
- 5 You will be prompted for the authorization number, enter the authorization number received over the telephone.
- 6 Touch MANUAL ENTER.
- 7 Touch CASH.
- 8 A "CAT Processing" message briefly displays on the register screen. If the credit card is approved, your receipts print in about 5 – 15 seconds.
- 9 Have customer sign the merchant receipt copy. Retain the merchant copy and present the other receipt to the customer.

*Merchant copies have the complete credit card number and expiration date. The customer copies do not.*

## **Return Credit Transaction**

- 1 Touch PAY SCREEN.
- 2 Touch DELETE.
- 3 Ring all items in original order.
- 4 Touch PAY SCREEN.
- 5 Touch REFUND CREDIT.
- 6 Swipe credit card through the reader and wait for approval.
- 7 Enter the 8 digit reference number from the original receipt.
- 8 Touch CASH.
- 9 When transaction is accepted, a Return Credit CAT receipt prints. Have customer sign this receipt.

### **Tip Edit (performed at the register)**

This is required if a transaction was finalized with the incorrect tip amount. This adjustment must be made before the End of Day.

- 1 Touch PAY SCREEN.
- 2 Touch TIP EDIT.
- 3 Use the number keys to enter the reference number (located on original receipt).
- 4 A "Processing" message appears on register display.
- 5 Use the number keys to enter the new tip amount.
- 6 Touch MANUAL ENTER.
- 7 Touch MANUAL ENTER again to finalize.
- 8 A tip receipt will print.

## Credit Card Batch and Settlement

The CAT Batch menu lets you view pertinent information regarding each batch processed. This menu is also used to **Submit** a failed or non-submitted (*current*) batch for settlement.

*The procedures in this section apply to stores using Southern Datacom and Merchant Link Processing.*



*Your CAT Batch Settlement is automated at the End of Day Process, therefore the Submit process may only be used to re-submit batches in your site.*

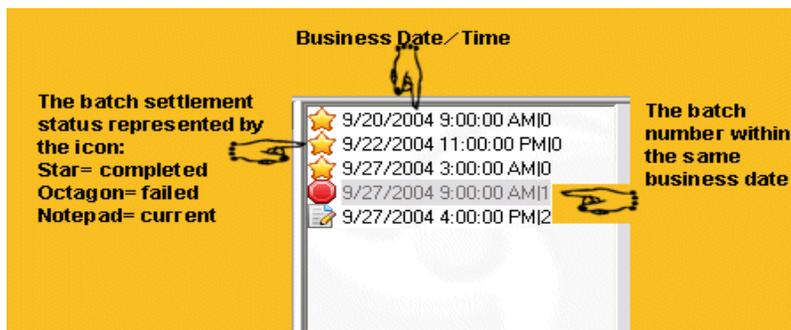


*Most card Processors have a specific deadline after which the rates increase. It is, therefore, a good idea to settle as soon as possible.*

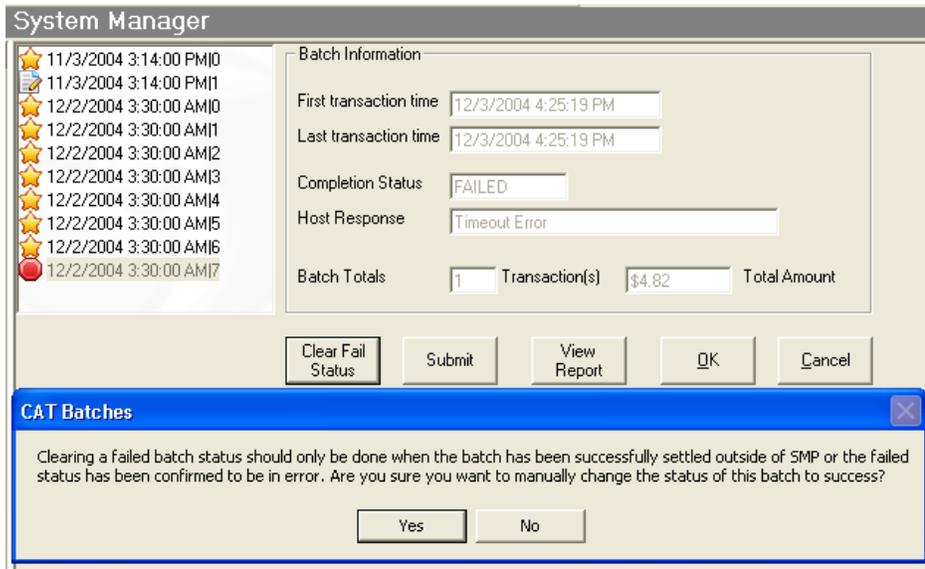
- 1 Open **SMP**
- 2 Open System Manager
- 3 Open CAT Batches

The list of batch transactions by business date and time appear in the left panel. Click on a **batch** to select it. After selecting the batch you can view the information for that batch, submit a batch for settlement, or resubmit a failed batch.

Batch Information	
First transaction time	9/27/2004 3:53:02 PM
Last transaction time	9/28/2004 11:30:06 AM
Completion Status	FAILED
Host Response	PROTOBASE Error
Batch Totals	2 Transaction(s) \$47.11 Total Amount



- 4 Clear Fail Status** is available for “failed” batch transmissions. However, this procedure should be used with caution and under the direction of an authorized support representative. In order for the SMP Batch menu to sync with the processed batch, this function must be performed after submitting the batch through PbAdm32. The status will change from ‘failed’ to ‘completed’ (successful).



After applying the Clear Fail Status the Host Response will indicate that the batch was manually set to the ‘completed’ status.



*Most card Processors charge for every successful transmission; therefore it is advisable that **BEFORE** you re-submit a failed batch, you call the Processor to verify that the batch was **NOT** successful.*

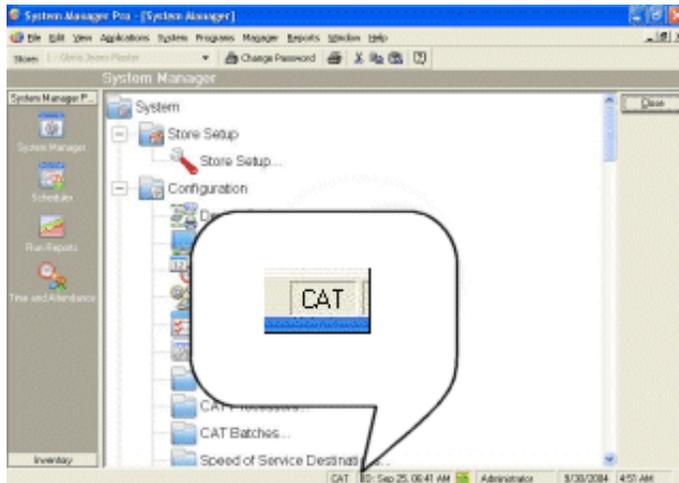
*If the batch was successful, but the CAT Batches screen still indicates that it is not, you can select that batch and run the Clear Fail Status command.*

*If you run the Clear Fail Status command on a failed batch that “was not” successfully transmitted to the Processor, you will still set the batch to a completed status. If this is done, you must contact your Support Representative for further instruction.*

The **View Report** button can be used to report on submitted and failed batches. This report is a Protobase Transaction Summary Report. It is a management tool for viewing details on the transactions processed from batch settlement.

When done, click **OK** to save and exit; or **Cancel** to exit without saving.

You may notice the status bar on the main SMP window, if a batch failed at settlement, the CAT identifier icon will be flashing in the status area. This is a quick alert indicator for management to check the bottom of your latest Protobase Transaction Summary report for the reason the settlement failed. You can call your authorized representative for additional help.



## Resubmit Failed Batches using SMP CAT

Failed batches may be resubmitted through SMP CAT



**Caution:** This section gives you the necessary steps to resubmit a failed batch. REMEMBER; for every batch you re-submit, you must run the **Clear Status Fail** command from the CAT BATCHES screen after performing this step.

### ► To resubmit failed batches

- 1 You want the settled transactions to be sub-totaled in the report.
- 2 Click on **Business Date** to select this option and enable the date entry box. Enter the business date (mmddyy).



*When you are resubmitting a failed batch settlement, it is a good idea to specify the business date of the transactions in the failed batch. This prevents current transactions from being settled along with the failed batch.*

- 3 To submit the batch for settlement, click **Deposit Selected**. The following Message appears, showing the number of transactions that are selected and the total dollar amount of the selected transactions:



- 4 Click **OK** to continue, or **Cancel** to exit without settling.

- 5 If you get an error message that the Comm Director is not running, open a **Command Prompt**, change the directory to `SMP\PB`, and then type the following command:

Pbdirect [ENTER]

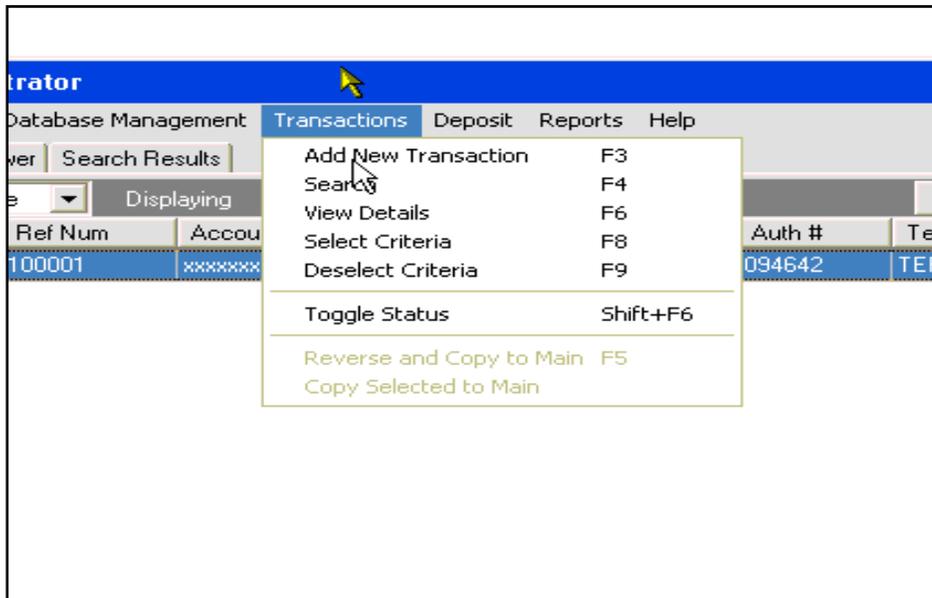
- 6 Return to PbAdmin and repeat the above steps for additional batches.



*For all other instructions regarding the use of PbAdmin, please consult your ProtoBase Administrator documentation or view the PbAdmin online help files.*

## Adding a New Transaction

- 1 **Log in** to Protobase Administrator.
- 2 **Point to Transactions** on the Menu Bar.
- 3 **Click on Add New Transaction.**



4 Complete the **transaction** information:

ProtoBase Administrator Detail View of Transaction : CSC #1333

Transaction | Restaurant | Compliance Data | AVS Data

Reference	100001	Amount	1.00
Host Ref		Customer	Laura McCully
Terminal	TERM1	Date / Bus. Date	07/14/04 07/14/04
Server ID		Time	14:17:03
Tran Type	Prior Auth	Auth #	094642
Account	xxxxxxxxxx33145	Inc. Info	1.00
Exp. Date	05/05		
Card Type	MC	MKey	M192
Card Name	MASTERCARD		

## Adding a New Transaction

### Adding a New Transaction (continued)

- 5 **Fill in Reference #** (start by using the number 1 and continue by using 2, 3, 4, etc, until all transactions are added). Terminal will always be Term1, enter Tran Type as Prior Auth. Fill in **Account #** from the credit card along with the expiration date. This will automatically fill in the following fields - Card Type, MKey and Card Name.
- 6 Enter the **transaction amount**.
- 7 Enter the **customer name** as shown on the card.
- 8 **Tab 3 times** to automatically fill in Date/Bus., Date, and Time.
- 9 **Tab** one more time and **click OK**.
- 10 You will get the following message:



- 11 Click **OK**.
- 12 Another message will appear.

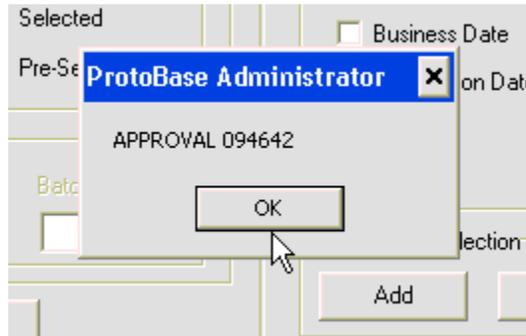


- 13 Click **Yes**.

## Adding a New Transaction (continued)

14 You will then be given an approval Number.

15 Click **OK**.



Now you will notice the new transaction has been added.

## Refunds

You can do a refund by creating a new transaction (entering the same information in the same way as a new transaction), with the exception of choosing **Refund** instead of Prior Auth under Tran Type.

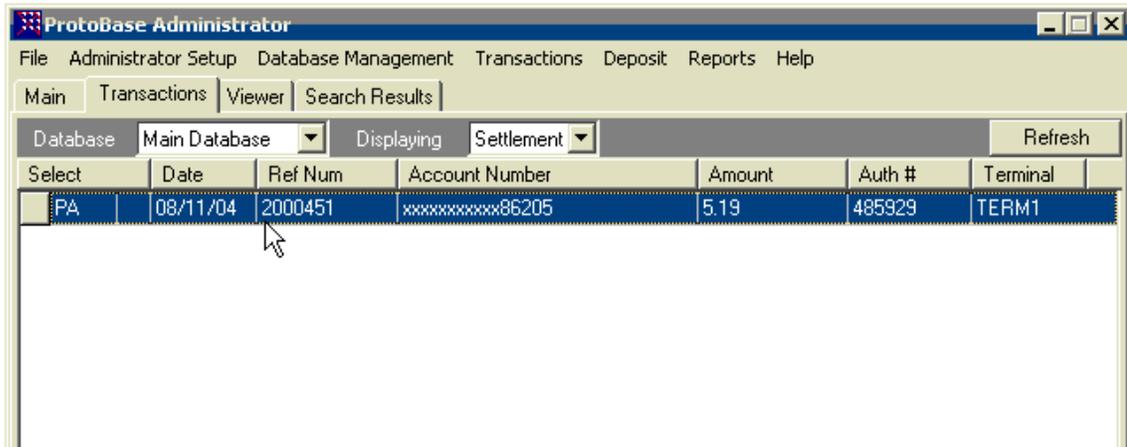
The screenshot shows a window titled "ProtoBase Administrator Add New Detail Transaction : CSC #1333". The window has three tabs: "Transaction", "Restaurant", and "Compliance Data". The "Transaction" tab is active. The form contains the following fields and values:

Reference	10002	Amount	1.00
Host Ref		Customer	Laura McCully
Terminal	TERM1	Date / Bus. Date	07/14/04 07/14/04
Server ID		Time	14:18:00
Tran Type	Refund	Auth #	
Account	xxxxxxxxxx33145	Inc. Info	
Exp. Date	05/05		
Card Type	MC	MKey	M192
Card Name	MASTERCARD		

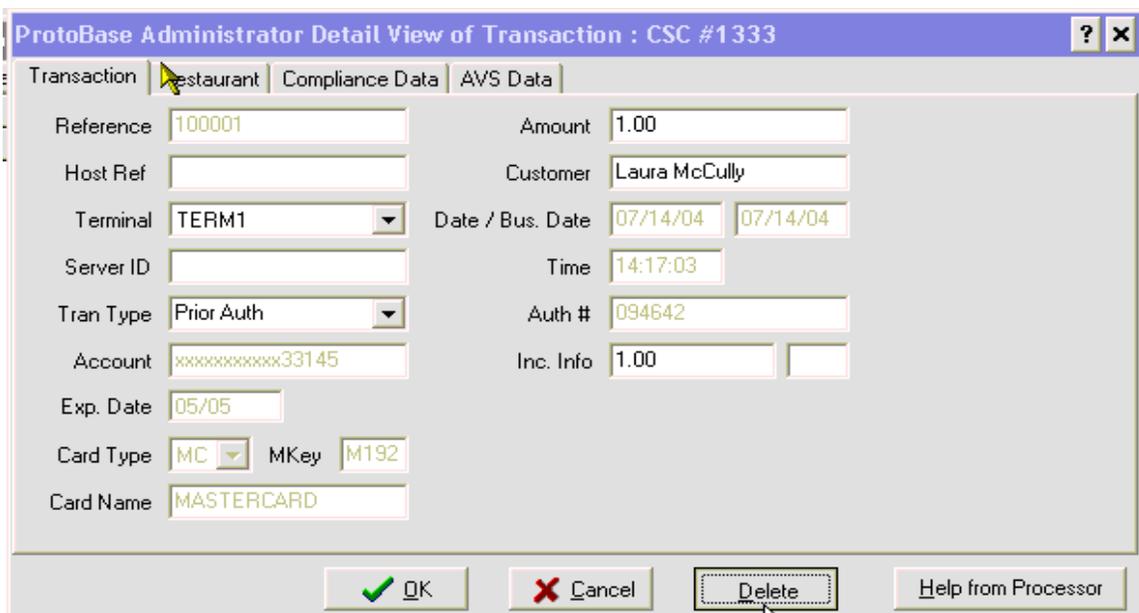
At the bottom of the window, there are four buttons: "OK" (with a green checkmark), "Cancel" (with a red X), "Delete" (disabled), and "Help from Processor".

## Delete a Transaction

- 1 If you need to delete a transaction from Protobase Administrator, you can **double click** on the transaction to open it:

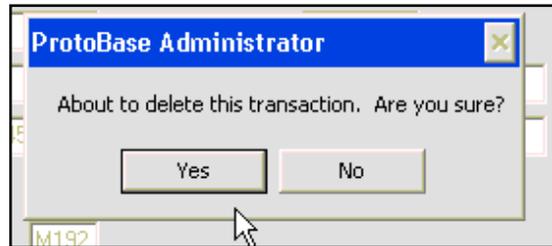


- 2 Click on **delete**:



### Delete a Transaction (continued)

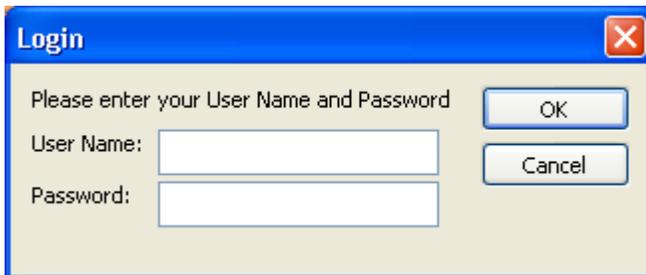
- 3 Confirm you want to delete by clicking **yes**.



The transaction will then be removed from the batch. Please note: deleting it in Protobase Administrator will not affect the totals appearing on your financial report from the registers. It only affects the dollar amount that gets settled.

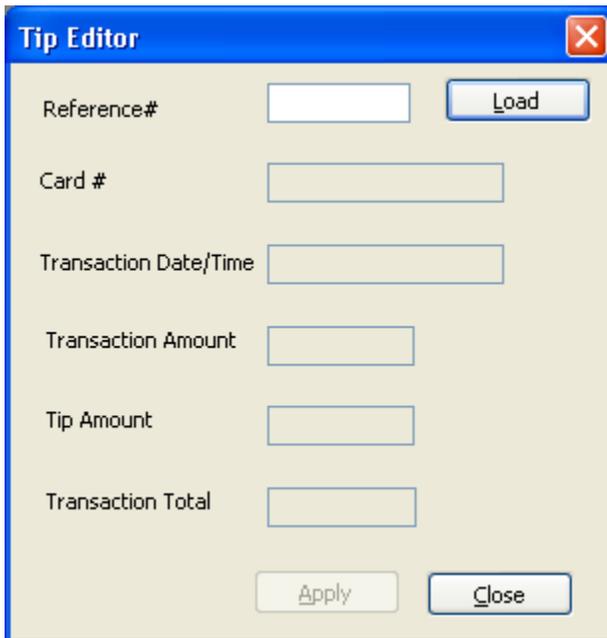
## Tip Edit

- 1 Login (use SMP user/password, requires batch edit permissions).



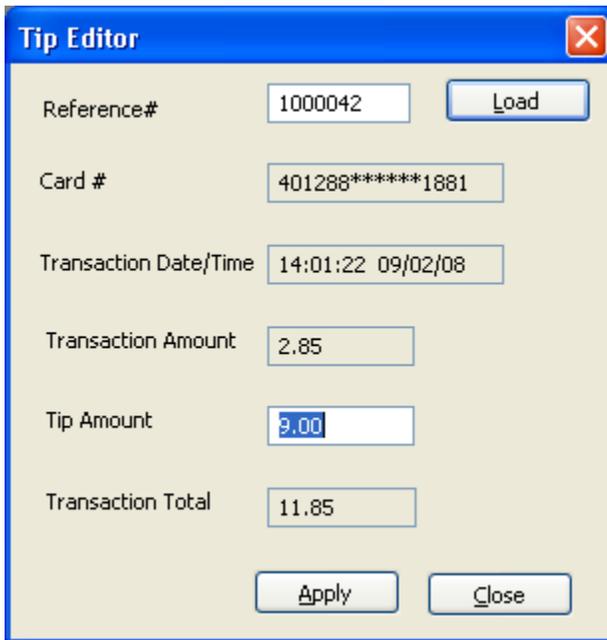
A dialog box titled "Login" with a blue header and a close button (X) in the top right corner. The main area is light beige. It contains the text "Please enter your User Name and Password" at the top. Below this are two input fields: "User Name:" followed by a text box, and "Password:" followed by a text box. To the right of the input fields are two buttons: "OK" and "Cancel".

- 2 Tip Edit Screen.



A dialog box titled "Tip Editor" with a blue header and a close button (X) in the top right corner. The main area is light beige. It contains several input fields and buttons. At the top left is "Reference#" followed by a text box and a "Load" button. Below that is "Card #" followed by a text box. Then "Transaction Date/Time" followed by a text box. Then "Transaction Amount" followed by a text box. Then "Tip Amount" followed by a text box. Then "Transaction Total" followed by a text box. At the bottom are two buttons: "Apply" and "Close".

3 Enter Reference Number, Press Load.

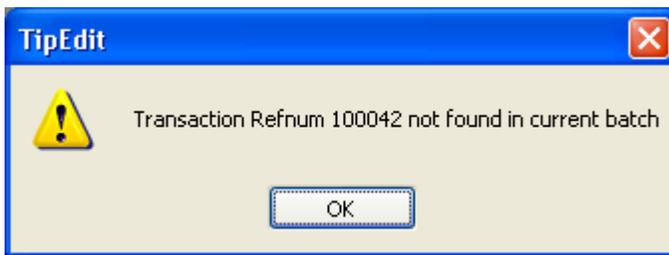


The screenshot shows a dialog box titled "Tip Editor" with a close button (X) in the top right corner. The dialog contains several input fields and buttons:

- Reference#: 1000042 (with a "Load" button to its right)
- Card #: 401288\*\*\*\*\*1881
- Transaction Date/Time: 14:01:22 09/02/08
- Transaction Amount: 2.85
- Tip Amount: 9.00 (highlighted in blue)
- Transaction Total: 11.85

At the bottom of the dialog are two buttons: "Apply" and "Close".

4 Bad Reference Number Error.

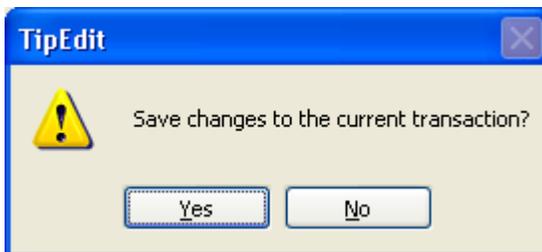


The screenshot shows a dialog box titled "TipEdit" with a close button (X) in the top right corner. The dialog contains a yellow warning triangle icon and the following text:

Transaction Refnum 100042 not found in current batch

At the bottom of the dialog is an "OK" button.

5 Try to exit or load another card after change.



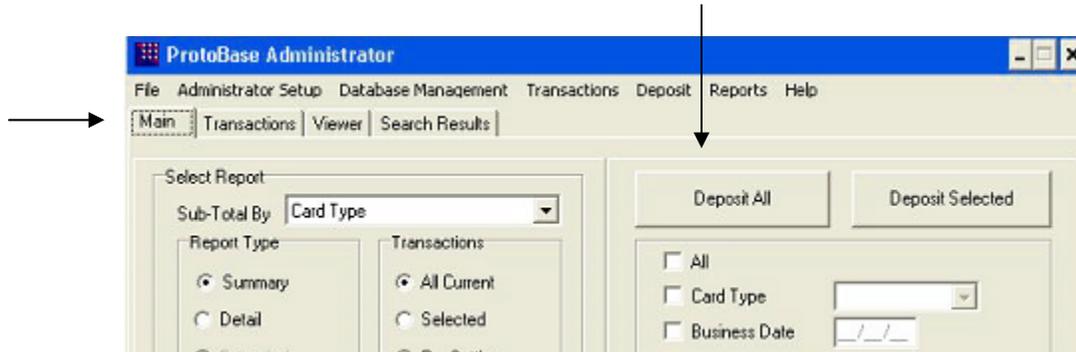
The screenshot shows a dialog box titled "TipEdit" with a close button (X) in the top right corner. The dialog contains a yellow warning triangle icon and the following text:

Save changes to the current transaction?

At the bottom of the dialog are two buttons: "Yes" and "No".

## Settling a Batch

- 1 Open **ProtoBase Administrator** software.
- 2 Click on the **Main** tab.
- 3 Click on **Deposit All** button.



- 4 On the Settlement Information confirmation, click **OK**.



- 5 Once the deposit is complete, a report will be generated. **Scroll to the bottom** of the Settlement Report to see if the batch settlement **PASSED**.

Card Type	Sales	Sales \$	Returns	Returns \$	Net	Net \$
HC	1	9.51	0	0.00	1	9.51
TOTAL	1	9.51	0	0.00	1	9.51

Deposit Response Message: OK02106140345

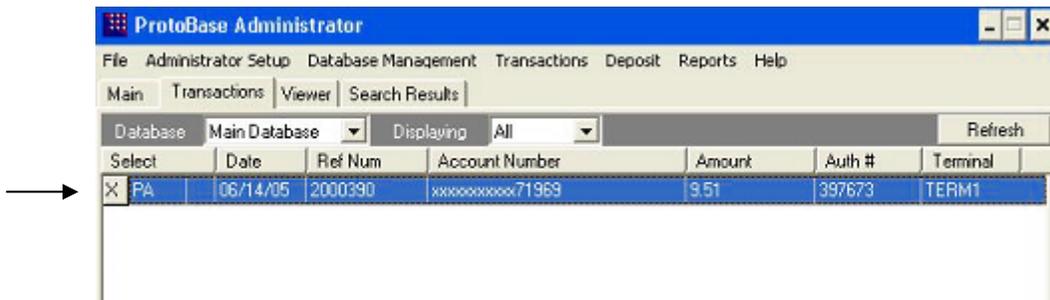
Settlement: PASSED

- 6 If Settlement report displays FAILED, check to see if you have an internet connection and try again.

## Performing a Select Deposit

If a deposit was not settled on a previous day, ProtoBase Administrator will start accumulating transactions. To separate the days you have the option of a select deposit.

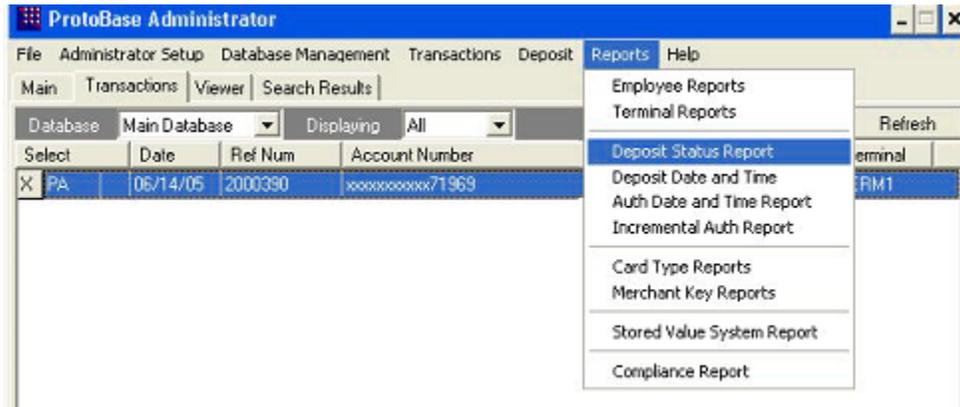
- 1 To select the desired transactions by date, click on the **Transactions tab**.
- 2 Next click the **box** at the beginning of the transaction.



- 3 Once all the desired transactions are selected, click on the **Main tab** and choose Deposit Selected.
- 4 Click **YES** for the selected deposit.

## View a Deposit Log

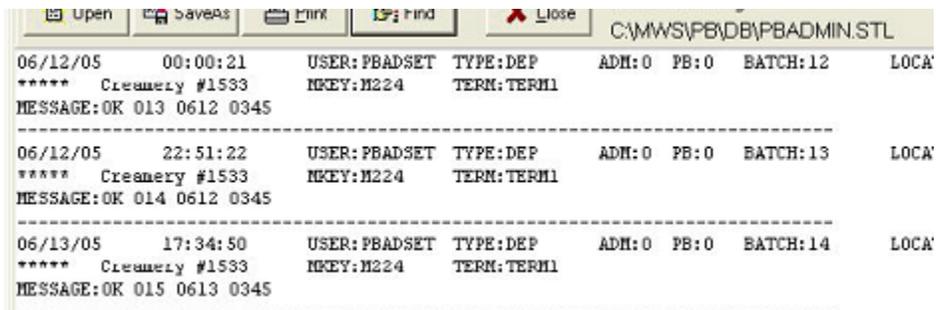
- 1 Open PBadmin click **Reports** on the tool bar.
- 2 Scroll to Deposit Status Report.



- 3 Select PBADMIN from the drop down menu and click OK.



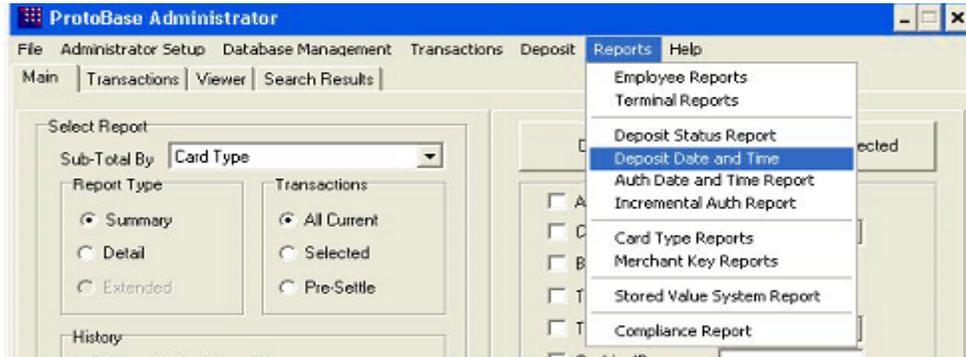
- 4 The following report will appear.



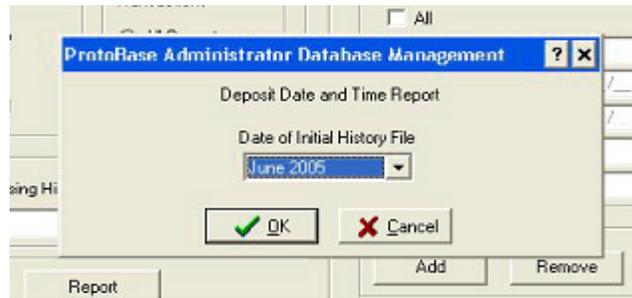
- 5 Find the date of when the deposit was settled.
- 6 If the message displays OK, then the deposit was successful.

## View Report by Deposit Date and Time

- 1 Point to **Reports** on the tool bar.
- 2 Scroll down and click on **Deposit Date and Time**.



- 3 Select the desired month and year and click **OK**.



- 4 The following report will appear:

ProtoBase Administrator Batch Summary Report for 06/05  
Transaction Totals By Batch Number  
For All Locations

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Location: Cold Stone Creamery #1533

Batch #	Date	Time	Net #	Net Amount	Deposit	Message
000000000001	06/01/05	22:34:17	000004	47.87	OK 002 0601	0345
000000000002	06/02/05	23:01:18	000003	101.35	OK 003 0602	0345
000000000003	06/03/05	23:27:45	000008	255.35	OK 004 0603	0345
000000000004	06/05/05	00:20:38	000014	232.24	OK 005 0605	0345
000000000005	06/05/05	23:21:37	000015	251.54	OK 006 0605	0345
000000000006	06/06/05	22:52:45	000010	208.46	OK 007 0606	0345
000000000007	06/07/05	23:53:49	000011	351.25	OK 008 0607	0345



## Assembling a POS “Crash Kit”

In the event of a POS system outage, you should be prepared to continue transactional operations your store. Kahala strongly recommends that you assemble a POS crisis kit or "crash kit" that can be used to continue business until you are back online with your system.

Your POS crash Kit should contain the following items:

- Telephone Numbers for the Kahala Help Desk
- Solar-powered calculator
- Pens & Pencils
- Customized pricing sheets
- Order forms/Receipt book
- Tax chart
- Cash reconciliation form
- Flashlight and batteries
- Manual Credit Card Machine
- Manual Credit Card Slips (carbon)
- Credit Merchant phone # with account #'s for manual authorization
- Keys to register drawers

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