



The House Accounts function is used for neighboring businesses and/or schools. Orders can be placed throughout the month and then paid for at the end of the month. Each account is given an *allowable charge* per month. Instead of tracking a House Account order under Eat In or To Go, it can be tracked under a separate order type. These types of orders are added to sales for the day.

The Help Desk will need to add a payment key and a paid in for House Accounts; 877-811-3811.

## House Accounts

### Allowable Charge

A customer must be setup in the system with an allowable charge and charge limit to use a House Account.

The screenshot shows the 'Customer Accounts' window. On the left, a list of accounts includes 'Thompson, Mike' and 'SMITH, JOHN'. The main form for 'SMITH, JOHN' contains the following fields and options:

- First Name: JOHN, Last Name: SMITH
- Phone #: (480) 362-4800, Account #: 4803624800, Picture File Name: [empty]
- Address: [empty], Apt/Suite: [empty]
- City: Scottsdale, State: AZ, Zip Code: 00000, Delivery Zone: Zone 1
- Delivery Instructions: [empty], Phone #2: ( ) -, Fax #: ( ) -
- Comments: [empty]
- Options: ☐ Do Not Deliver, ☒ Allow Charge, ☐ Returned Mail, ☐ Bad Check, ☐ VIP, ☐ Require Approval
- E-mail Address: [empty], Company: Kahala
- Birth Date: / /, Anniv Date: / /, Charge Limit: \$450.00, Balance: \$0.00
- Loyalty Plans: 1. ☐ Plan1, 2. ☐ Plan2, 3. ☐ Plan3, 4. ☐ Plan4
- Discount (Instant): <None>

At the bottom are buttons for Close, Save, Add, Delete, Find, Tools, Loyalty, and Cancel.

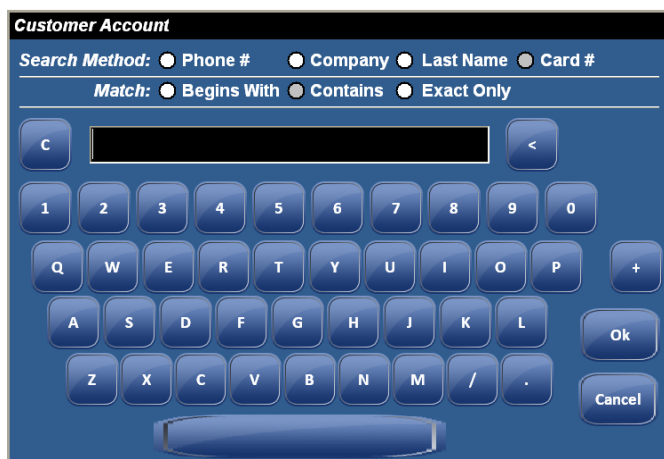


## Ringing the Order

1. if a separate order type is established for house accounts, select the order type
2. ring item(s)
3. touch all payments
4. touch house account



5. enter search method  
*search method can be phone #, last name, etc.; this is customizable and a default can be set*



6. touch ok
  - if customer exists then it will display
  - if customer does not exist, prompts will display for the customer to be added



7. touch ok for correct account
8. house account \$amount payment screen will display
  - enter tip if applicable

The image shows a digital payment screen titled "House Account". It displays a summary of charges: Subtotal (88.37), Tip (0.00), Due (88.37), and Amount (88.37). Below the summary is a numeric keypad with buttons for digits 1-9, 0, and a left arrow. There are also buttons for "OK", "Next", "C" (clear), and "Cancel".

9. touch ok
10. receipt will print with items, acct #, and charge balance

The image shows a receipt printout with the following details:

Check 9	
Crew Mbr	2/4/2011
Eat In	3:20pm
-----	
Large Party Tray	24.99
Large Party Tray	24.99
-----	
Subtotal	49.98
Food Tax	3.37
-----	
TOTAL	53.35
-----	
House Account	- 53.35
Acct. 4803624800	
Charge Balance \$53.35	
-----	
CHANGE DUE	0.00

***note:*** if charge limit on customer is less than the order, an error message will display; touch ok and raise allowable charge limit, which can only be done using the back office application



## Statement Report

Print a statement report for customer.

1. touch reports



2. touch account statement



3. select date range

4. touch ok

- or touch **customer: (all)** to select one customer and customer search will display

**Account Statement**

Start Date: 01/20/2012 15 End Date: 01/20/2012 15

Destination: Screen

Customer: (All)

OK Cancel

**Customer Account**

Search Method: Phone # Company Last Name Card #

Match: Begins With Contains Exact Only

1 2 3 4 5 6 7 8 9 0

Q W E R T Y U I O P

A S D F G H J K L

Z X C V B N M / .

OK Cancel

5. report will display which can be emailed, saved, printed



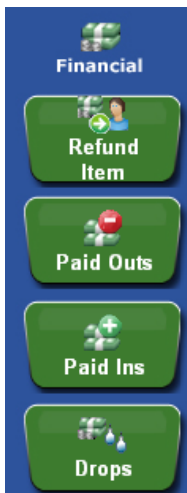
## Pay to House Account

Customer is making a payment to the house account. This is a paid in. The system will accept partial or full payment.

1. touch functions



2. touch paid in



3. touch house account



4. touch new

5. touch house account





6. enter search method

The screen is titled "Customer Account". It has two rows of radio buttons. The first row is "Search Method:" with options "Phone #", "Company", "Last Name", and "Card #". The second row is "Match:" with options "Begins With", "Contains", and "Exact Only". Below these is a text input field with a "C" button to its left and a "<" button to its right. Below the input field is a numeric keypad (0-9) and an alphabetic keypad (A-Z, space, and punctuation). There are "Ok" and "Cancel" buttons at the bottom right.

7. touch ok
8. touch yes for correct account
9. touch payment type; cash, credit
10. enter \$ amount; partial or full amount

The screen is titled "Paid Ins". It has a sub-header "New Paid In (House Account)". Below this is a text input field for "Amount" with the value "88.37". To the right of the input field are "OK", "Next", and "Cancel" buttons. Below the input field is a numeric keypad (0-9) and an alphabetic keypad (A-Z, space, and punctuation). At the bottom are four buttons: "Voucher", "New", "Void", and "Close".

11. touch ok twice
12. a paid in voucher will print with payment and current balance
13. touch close

The printout is titled "Paidin Voucher (2/4/2011 3:39:20 PM)". It contains the following information:

- House Account
- Revenue Center: Blimpie
- Station: 01 Focus
- Crew Mbr
- Cash: \$53.35
- Customer First and Last Name
- Customer Acct # XXXXXXXX
- Current Balance \$0.00