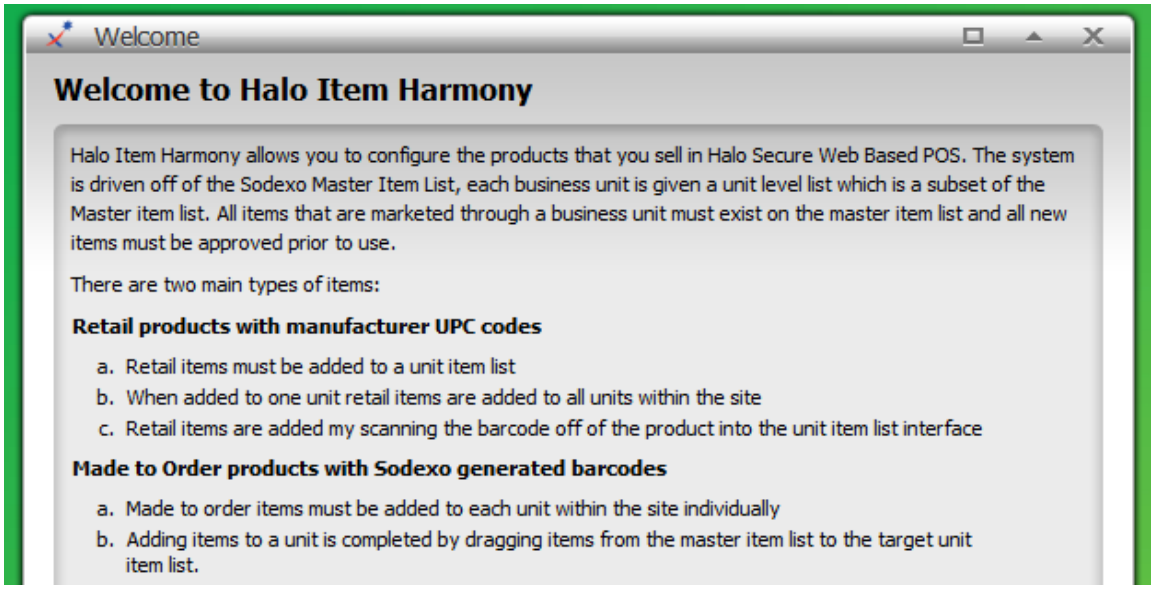
VIVONET

halo™ leaders in secure web-based POS



Item Harmony 1.5 Admin Manual

This guide outlines all of the main Admin-related Item Harmony functions.

23/10/2013

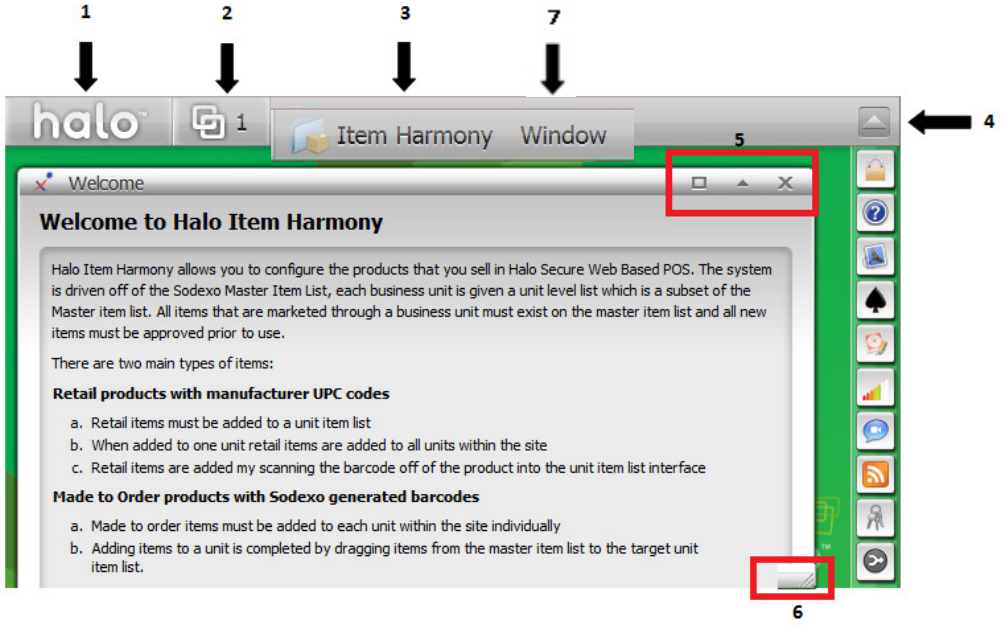
Version: 1.5

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Item Harmony Functions



1. **Halo tool bar tab:** Allows you to launch the Item Harmony window.
2. **Windows tab:** Allows you to launch hidden windows.
3. **Item Harmony tab:** Allows you to launch the Master Item List.
4. **Settings:** Allows you to change your password and request for Item Harmony assistance.
5. **Window Options:**

   Square = sending the window behind.
   Triangle= minimizing the window.
   X= closing the window.

6. **Expand/Decrease Window:** Allows you to expand and/or decrease the window size. (Simply hold left-click and drag outwards and/or inwards)
7. **Window:** Allows you to change options on the current window you have open. Options include **Shade Window, Send Window to Back, Smart Resize, Hide Window,** and **Close Window**.

Store Location Actions

About This Store

About This Store opens a window with information on the Store currently opened. From here you can change several options including Tax Region and if the Store is allowed to Broadcast or not. This Broadcast option is for a company with many stores who want to limit how many of their locations are able to Broadcast items.

Request New Item

Request New Item allows you to request a new item that is not listed on the Master Item List.
Please reach out to the Sodexo Item Harmony team for assistance

Submit for Validation

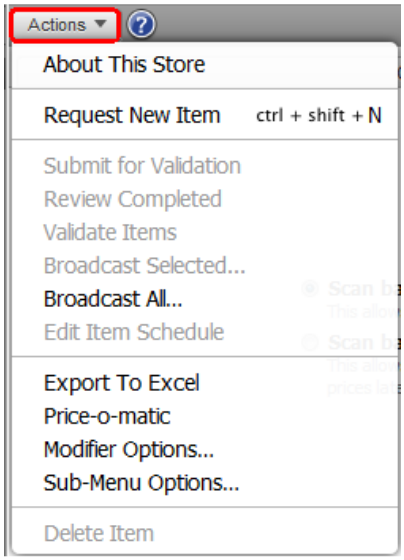
Submit for Validation sends an email to the Sodexo Item Harmony team, requesting validation for not validated items. (For information, go to Submit for Validation).

Broadcast All/Selected

Broadcast All/Selected allows you to transfer items from one unit to 1 or more units. (For information, go to Broadcast All/Selected).

Export to Excel

Allows you to export only **Validated** items onto an excel sheet.



Building a Menu – Following 6 Steps

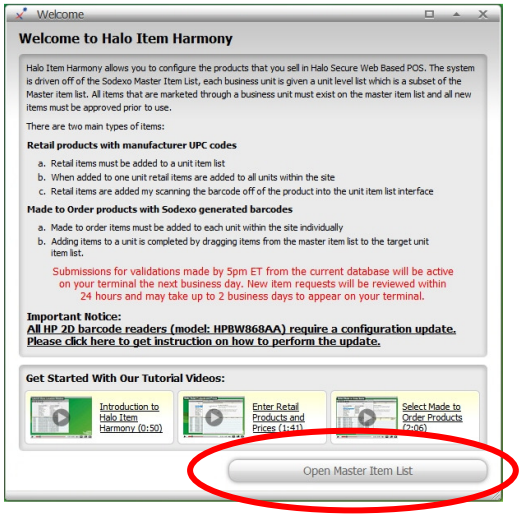
Step 1: Open Master Item List and Open Store Location

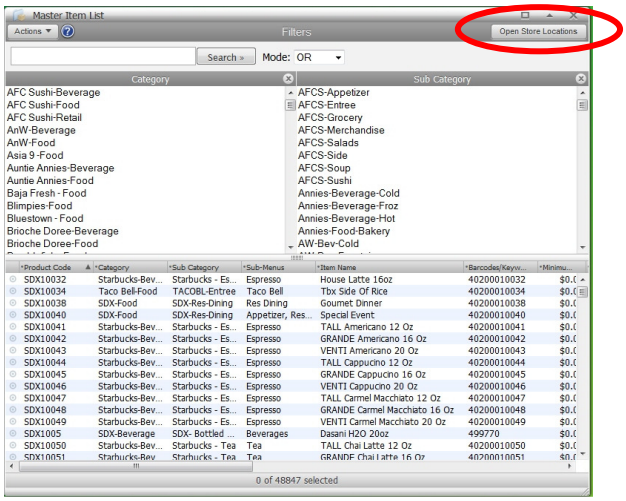
The **Master Item List** is Sodexo's Central Database of items that is sold in North America.

This Master List is used to find items to input into your own store location.

The **Local Store Location** is your location's database of menu items.

Master Item List **Open Store Locations**

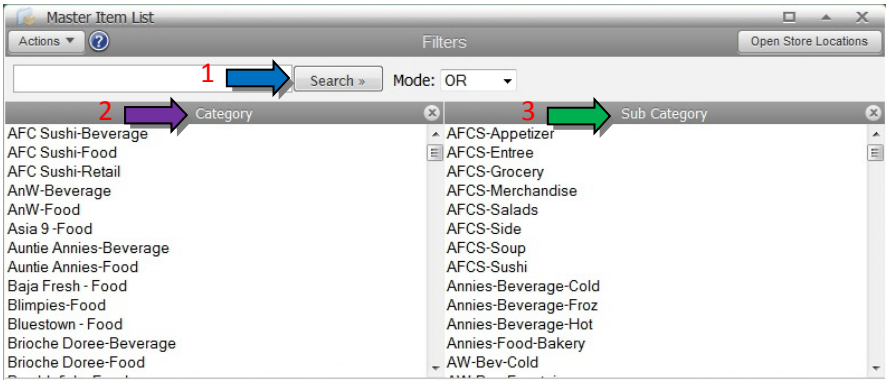




Step 2: Adding New Items

Searching for Items

1. **Search Bar**- Type in the Item Name, Product Code, Barcode, or Recipe Number along with a search Mode.
2. **Category**- Search within a Specialty Category by left-clicking a selection.
3. **Sub-Category**- Search by Sub-Category in the Specialty Category.



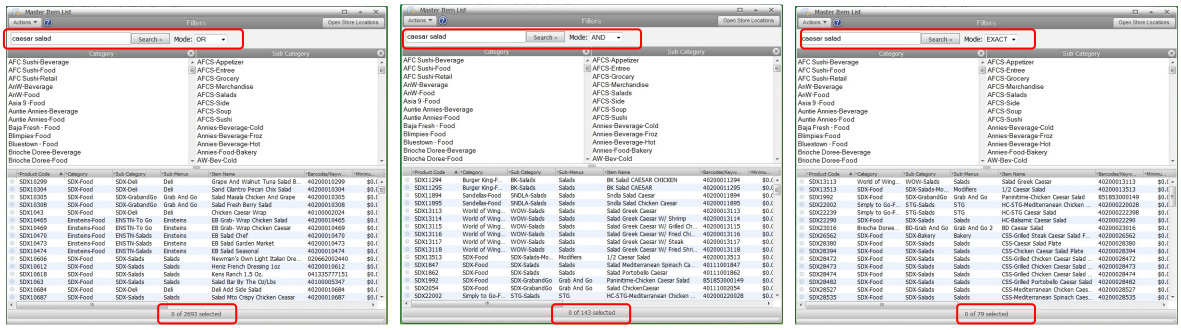
Using Search

The Mode button drop-down to the right of the Search button facilitates searching for specific items. It has three choices in the drop-down list: **OR**, **AND**, or **EXACT**. The default is **OR**.

AND – Both words in the search. (Caesar salad, salad Caesar etc)
EXACT – All words in the search exactly as typed.
OR – Any words in the search.

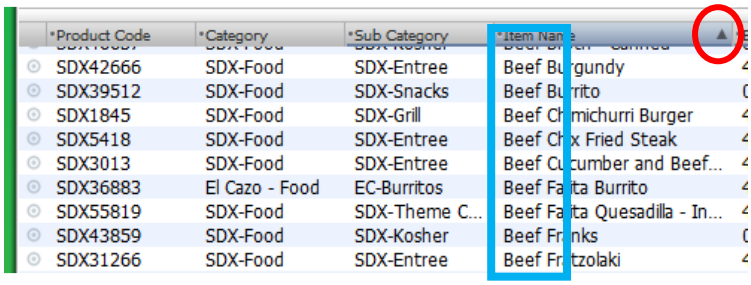
Using this search Mode is not case sensitive so it returns both upper and lower case results. The **Mode** drop-down list has also been added to the Store Window, for the same additional search options.

Using the example “Caesar salad” you can see that the different options return a wide array of results. Using **OR** always returns a very large search, **AND** yields a medium number of results, while using **EXACT** always returns the smallest number of results.



Column Filters

Each column can be filtered by alphabetical order, by **triple left-clicking** the specific heading.



Product Code	Category	Sub Category	Item Name
SDX42666	SDX-Food	SDX-Entree	Beef Burgundy
SDX39512	SDX-Food	SDX-Snacks	Beef Burrito
SDX1845	SDX-Food	SDX-Grill	Beef Chimichurri Burger
SDX5418	SDX-Food	SDX-Entree	Beef Chix Fried Steak
SDX3013	SDX-Food	SDX-Entree	Beef Cucumber and Beef...
SDX36883	El Cazo - Food	EC-Burritos	Beef Fajita Burrito
SDX55819	SDX-Food	SDX-Theme C...	Beef Fajita Quesadilla - In...
SDX43859	SDX-Food	SDX-Kosher	Beef Franks
SDX31266	SDX-Food	SDX-Entree	Beef Fritzolaki

Example: Notice the Beef items are all grouped together.

Divisional Item Prefix

CAM = Campus
CSS = Corporate Services
HC= Healthcare
No Prefix= Generic or non-division specific

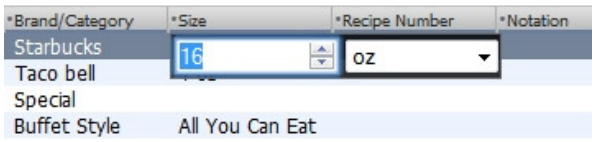
Customizing Columns

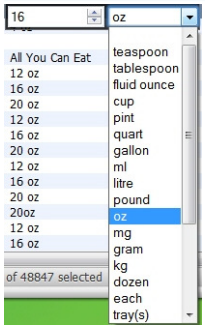
By **right-clicking** one of the columns, it allows you to add a new and/or remove columns from your view.



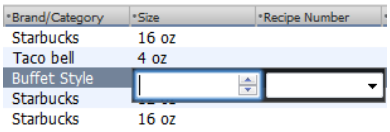
Size Column and Unit Type

The Size column has been changed so that it now has an approved set of units accessed through a drop-down list when you select an item's size. The format for the size column is now ***<numeric> <unit>*** so for example 16 oz.





Previously the **Size** column was a text field where anything could be entered so now any new entries use this formatted unit drop-down, and any old items already listed can be changed by double-clicking the Size column.



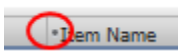
If you clicked the item "Buffet Style" in the example we used earlier, then it is not an approved unit type and will open as a blank.

If the current unit is close to any on the formatted list, then it is automatically changed when you open the size field, or it ends up being blank so you can manually change the unit type for that entry.

The **Store Window** has the same size column unit changes.

Moving Columns

Left-click and hold the dot next to the column heading then drag the column to a new preferred position.

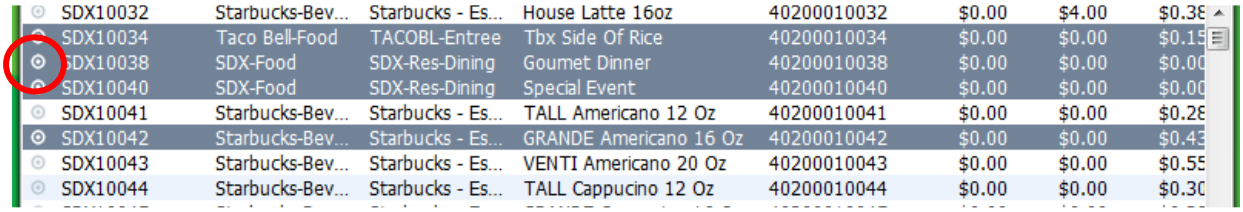


Adding Items

There are 2 ways to add items into the Local Database:

Drag and Drop

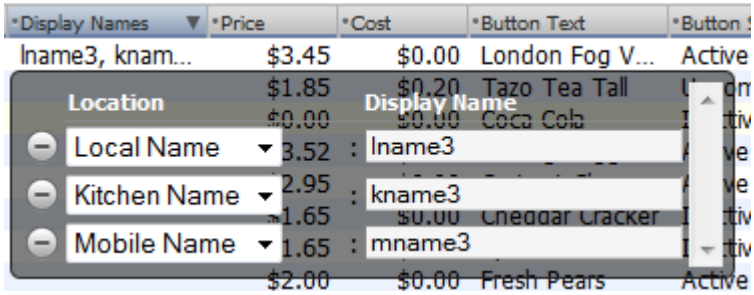
1. Left-click Item(s).
2. Mouse over the circle (far left of the item).



3. Hold the left click (For multiple items, please pick 1 highlighted circle).
4. Drag and Drop into Local Database.

Configuring Item Display Names

The Display Name sub-editor of the **Add Menu Item** and **Add/Change Menu Item** editors has the following optional names: ***Local Name, Kitchen Name*** and ***Mobile Name***. Clicking in the Display Names column opens this sub-editor:



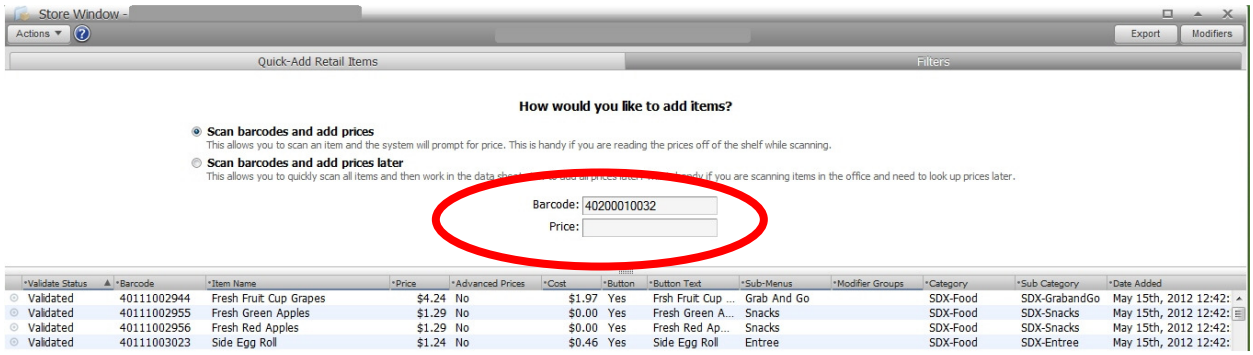
By default, every item in the database has an **Item Name** and a **Button Text** value. These two values remain unchanged, but the additional Display Name values allow you to override what is printed/displayed to staff and customers depending on where those items are outputted.

See the table below for examples.

Local Name	The item name that is displayed on a customer receipt and onscreen for cashiers (in the tab/check area).
Kitchen Name	The item name that is displayed on a kitchen (remote) printer.
Mobile Name	The item name that is displayed in the Vivonet Mobile App, at participating locations.

Scan Items with a Barcode into Item Harmony (w/Scanner)

1. (Local Database) left-click the **Barcode** box.
2. Connect Scanner to computer.
3. Scan Barcode on the item.



REMINDERS:

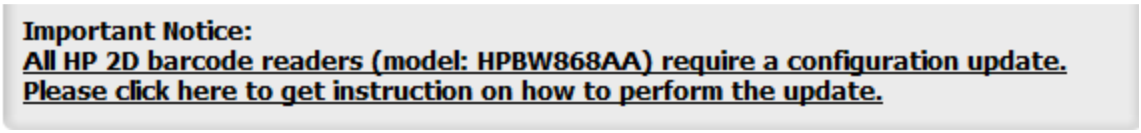
Add prices for scanned items.

Double-check prices for ALL items on your menu (Drag and Drop items).

Barcode Variations during Input to avoid Duplication

Depending on the handheld scanner manufacturer (for example, PartnerTech vs. HP) used at the Halo Point of Sale; the scanner can be pre-configured to scan and output a 6-digit, 8-digit, or 12-digit barcode by default.

On the Welcome to Item Harmony screen it outlines configuration for specific barcode readers:



You were able to scan a barcode and create a duplicate item as Item Harmony incorrectly believed the item to be unique. The scanned item (name) may already exist in the database but the barcode is simply not recognized in this instance since only one of the variants exists in the Item Harmony data.

When Item Harmony detects a barcode input of any length *other than* 6, 8 or 12 digits, a message dialogue is now displayed informing you that the handheld scanner is not configured to a standard barcode length format and suggests re-configuring it. You can then either continue or cancel the item entry into the Item Harmony database.

"A <digit #>digit barcode has been detected. Item Harmony expects a 6, 8 or 12 digit barcode, which are UPC-A / UPC-E standard lengths.

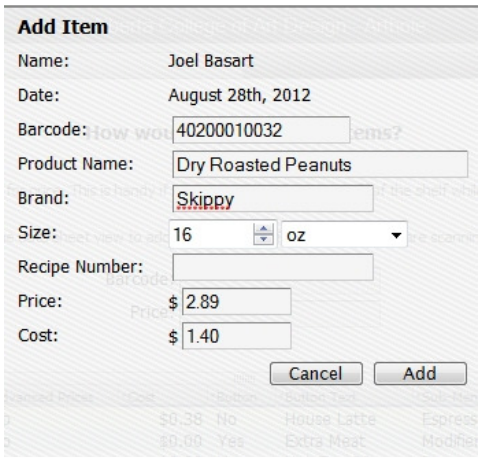
If you have manually entered this item, and believe the <digit #>-digit barcode is correct, click "Create Item" to continue.

If you have scanned this item, please re-configure your scanner to output a 6, 8 or 12 digit barcode and try adding this item again."

For all new items being entered into Item Harmony, all applicable barcode variations are now auto-generated and logged against the new item (or an existing item, if an item “match” is detected in the existing Item Harmony database) and prevents duplicate items from being introduced into the database.

Requesting a New Item

If the item is not in the Master Item List, a request a new item box is displayed.



Please enter all information and be as detailed as possible

Example:

Remember to add Brand & Size to the request

All new menu item requests should include a recipe number

Category	Specific	Generic	Notes
Soup	Three Bean Chili 12 oz Three Bean Chili 16 oz	Soup – Small Soup – Large	Soup recipes must be identified by **recipe and size**
Breakfast	Ham Egg And Cheese Bagel Vegetable Frittata Omelet	Breakfast Sandwich Omelet	Note the **ingredients** in the specific example vs. none in the generic
Breakfast	Sausage Links 2oz Bacon 1 slice 1 Pancake	Sausage Bacon Pancakes	Note the **portions** in the specific example vs. none in the generic
Basic Deli	Sandwich Turkey Sandwich Roast Beef Etc.	Deli Sandwich	Note the **ingredients** in the specific example vs. none in the generic
Combos	Grill Combo (Spec –discount button) Add Combo w. Fountain Bev and Fries	Combo	The Combo is added as a **MODIFIER or/ Discount**
Simply to Go	Red, White and Blueberry Parfait Vanilla Pudding Snack Cup Chocolate Pudding Parfait	Parfait Pudding	Note the **ingredients and portion** in the specific example vs. none in the generic

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Step 3: Editing Pricing and Buttons

By **double left-clicking** the **Price**, **Cost** or **Button**, it allows you to edit the item. Once the change is made, click outside the blue box in order to save the changes.

Price

*Item Name	*Barcodes/Keyw...	*Minimum Price	*Default Price	*Default Cost	*Brand/Category	*Size	*Validated	*Button Text
House Latte 16oz	40200010032	$0.00	$4.00	$0.38	Starbucks	16 oz	Validated	House Latte
Tbx Side Of Rice	40200010034	$0.00	$0.00	$0.15	Taco bell	4 oz	Validated	Side Of Rice
Special Event	40200010040	$0.00	$0.00	$0.00	Buffet Style	All You Can Eat	Validated	Special Event

Cost

Adding a cost allows you to track cost in Enterprise Manager reports

*Item Name	*Barcodes/Keyw...	*Minimum Price	*Default Price	*Default Cost	*Brand/Category	*Size	*Validated	*Button Text
House Latte 16oz	40200010032	$0.00	$4.00	$0.38	Starbucks	16 oz	Validated	House Latte
Tbx Side Of Rice	40200010034	$0.00	$0.00	$0.15	Taco bell	4 oz	Validated	Side Of Rice
Special Event	40200010040	$0.00	$0.00	$0.00	Buffet Style	All You Can Eat	Validated	Special Event

Button Status

*Turning the Button Status column to **Active** enables the button on the register*

*Button Text	*Button Status	*Start Date	*End Date
Coffee Traveler	Active	2013-01-13	
London Fog Tall	Active	2013-01-13	
London Fog G...	Active	2013-01-13	
London Fog V...	Active	2013-01-13	
Feature Grande	Active	2013-01-13	
Feature Venti	Active	2013-01-13	

The **Button Status** column has a dynamically-computed status that uses one of the following four values, computed at load time:

- ***Inactive*** – if the item has no start date (for example, it is disabled).
- ***Upcoming*** – if the start date is in the future.
- ***Active*** – if the current date matches the start date, or is in between the start and end date.
- ***Active (Scheduled)*** – if the end date is currently in the past, but the item is scheduled for recurring activation on a weekly basis.

If you click the **Button Status** column then the Schedule Editor opens where you can apply these different statuses to the item:

*Button Status	*Start Date	*End Date
Inactive		
Upcoming	2013-01-31	2013-02-28
Active	2013-01-13	
Active (Scheduled)	2013-01-13	2013-02-28
Active	2013-01-13	

Tips

ALL bar-coded items should have the button turned **Off**.

Menu Cycle Items can be turned on/off weekly and/or daily.

****Note:** Items that are **validated** require the changes to be completed (for example, turning on/off buttons) by **5:00pm EST**, in order to have the changes display on the register for the next day** (For more information, go to **Daily Exports**)

Button Text

Button Text reflects what is displayed on the register

*Item Name	*Barcodes/Keyw...	*Minimum Price	*Default Price	*Default Cost	*Brand/Category	*Size	*Validated	*Button Text
House Latte 16oz	40200010032	$0.00	$4.00	$0.38	Starbucks	16 oz	Validated	House Latte
Tbx Side Of Rice	40200010034	$0.00	$0.00	$0.15	Taco bell	4 oz	Validated	Side Of Rice
Special Event	40200010040	$0.00	$0.00	$0.00	Buffet Style	All You Can Eat	Validated	Special Event

Tip

Removing unnecessary letters/pre-fixes ensure that the buttons are easier to read for your cashiers.

Example: Changing Sbux Coff Rostd to Starbucks Rst 12oz.



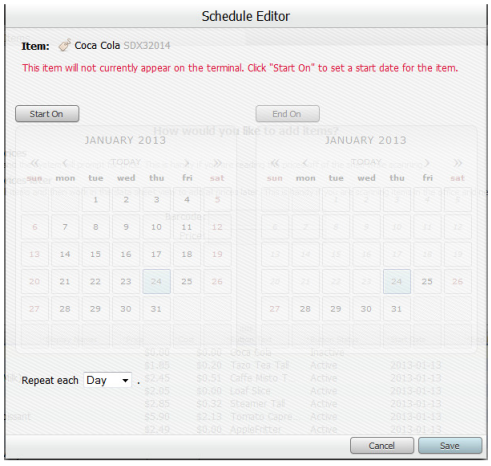
Example: Removing divisional prefixes CSS- STG- Strwbrry Nd to STG Strawberry Nd.



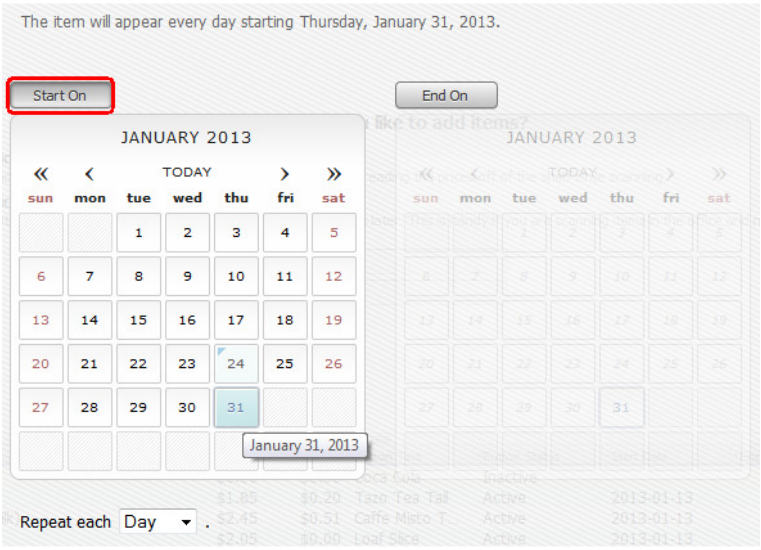
Button Scheduling

The button scheduling system allows you to activate or inactivate buttons on a daily or weekly schedule. You can schedule date-based button changes, on the Halo POS touch screen, to accommodate items that should only be available on certain days.

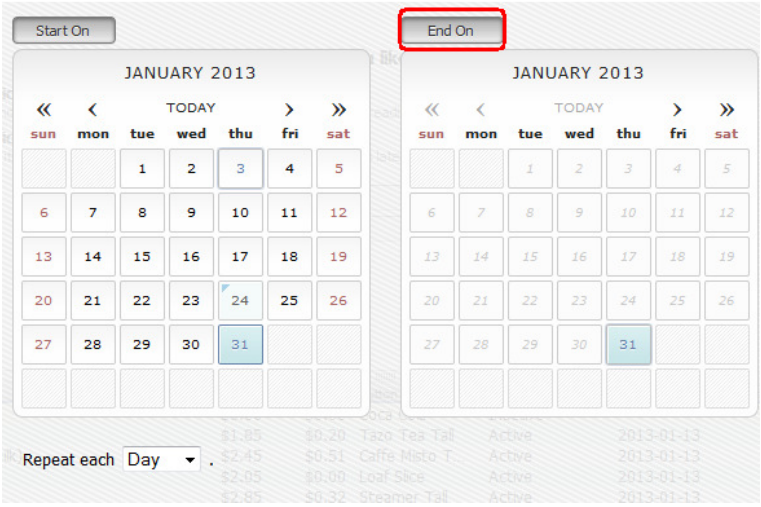
From the Store window, clicking the **Button Status**, **Start Date**, **or End Date** columns opens the **Schedule Editor**:



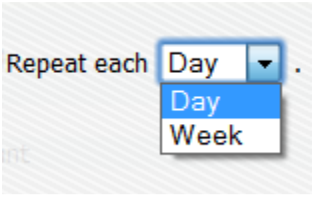
1. Click the **Start On** button to enable the calendar and select a start date for this button to display on the POS Terminal.



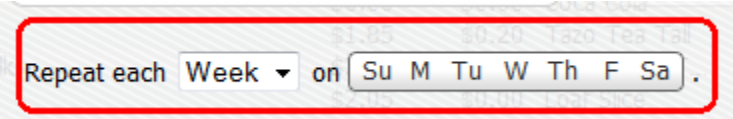
2. Next click the **End On** button to select when this button should be de-activated. If you do not want an end date, then you just leave this section alone.



3. Select if the button should be repeated on a daily (**Day**) or weekly (**Week**) basis (day is default).



4. If you select **Week** then a bar next to the drop-down displays each day of the week and you click the day you want the button to appear during the week (Sunday to Saturday).



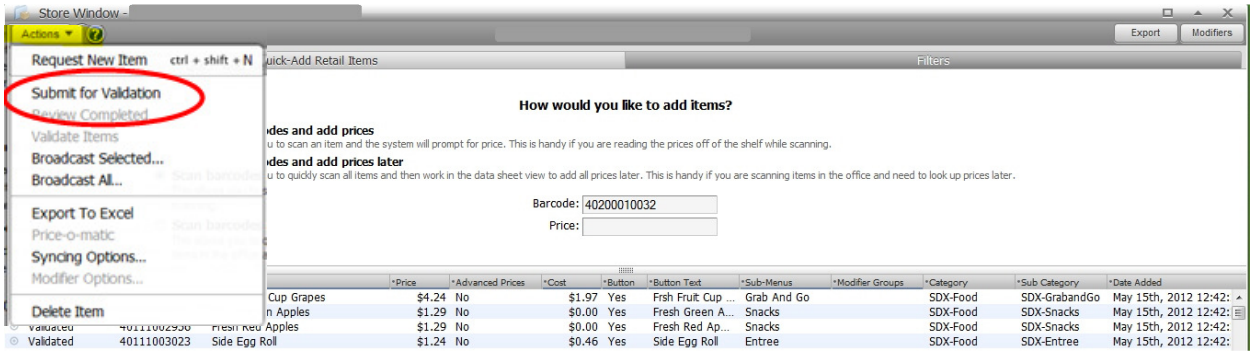
Step 4: Submit For Validation

Items that are marked **Not Validated** in the **Validate Status** column are not displayed on the register until **Validated.**

Not Validated items happen when:

- A new item is added to the local database.
- When making a change to a price.
- When making a change to cost.
- When a price is not added to an item.

To Submit for Validation go to the **Actions** Tab (in the Local Database); select **Submit for Validation**. (You can do this for single and/or bulk validations)



This needs to be done by **5:00pm EST, for the changes to take effect the next day in your Terminals**

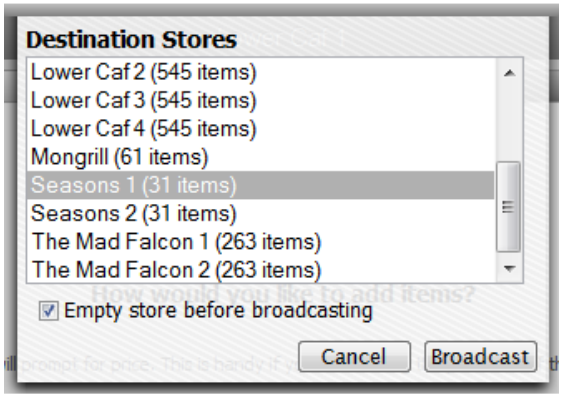
Step 5: Broadcast All/Selected (Optional)

Locations that have multiple registers will need to do a Broadcast All, to have all the Registers match.

Broadcast All

1. In the **Actions** tab, select **Broadcast All**.
2. Select Register(s) (hold CTRL to select multiple Registers)
3. Check off the Empty store before broadcasting box
4. Click **Broadcast**.

Important Note: **Empty Store before Broadcasting** guarantees that all menu updates from your primary menu (for example, Café 1), are broadcasted to the multiple registers.



Broadcast Selected

1. Highlight the selected items that need to be Broadcasted
2. In the **Actions** tab, select **Broadcast Select**.
3. Select Register(s) (hold **CTRL** to select multiple Registers)
4. Click Broadcast Selected.

Step 6: Daily Export (Automatic)

Daily Exports **automatically** run after **5:00pm EST daily**. This process transfers all your updated changes from Item Harmony into all your terminals **to effect the next day in your terminals.**

Changes include:

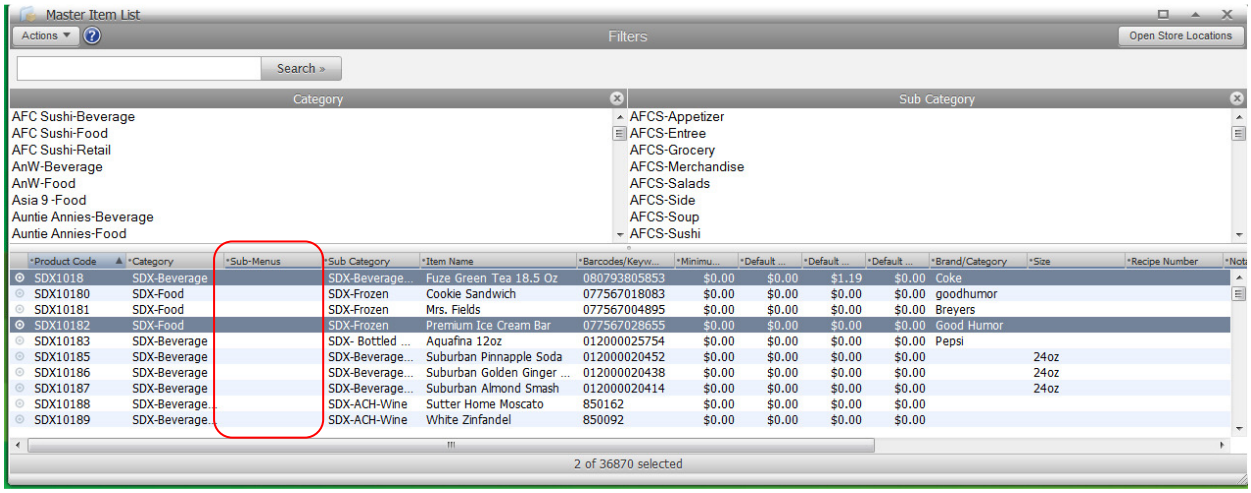
- Item Prices
- Item Cost
- Buttons ON/OFF
- Button Text
- New item on the menu

Mapping a Sub-Menu to a Sub-Category

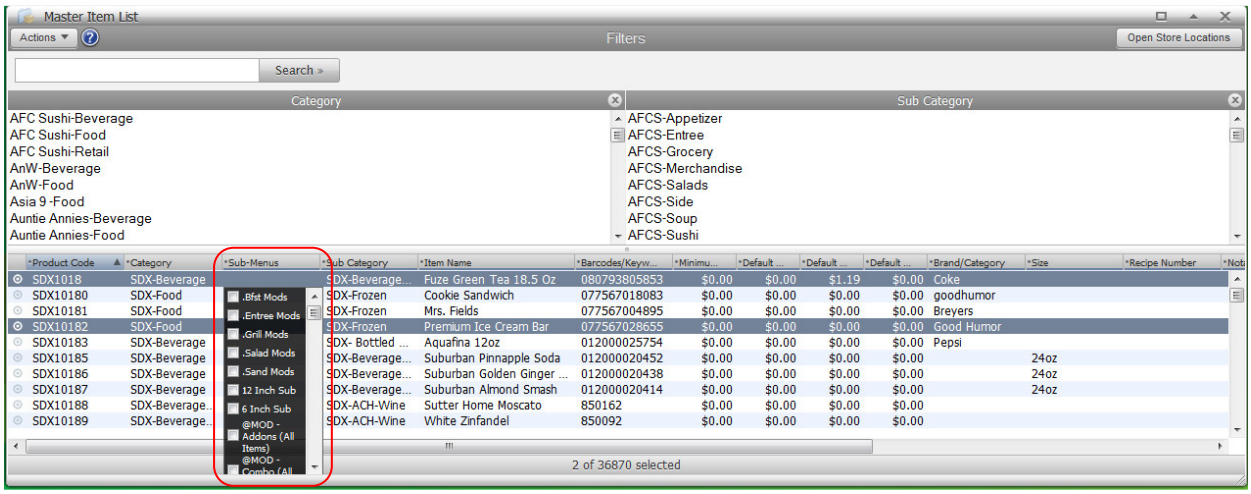
Sub-Menu Column

On either the Master List or the Profit Center list, right-click anywhere on the column headers of the table, and a menu appears listing the available columns to view.

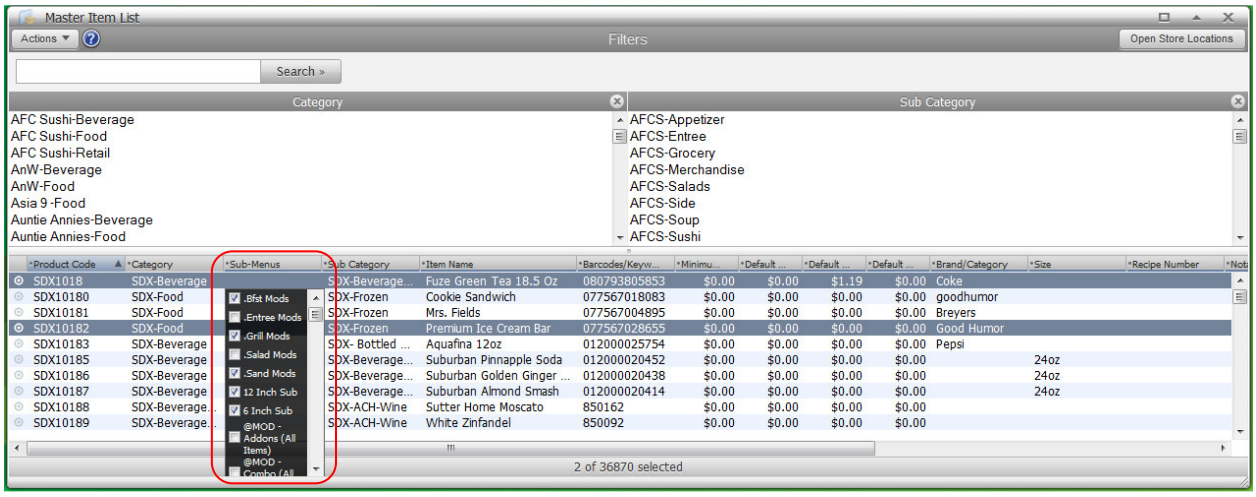
The Sub-Menus column should be visible in the list. If it is not, then it is disabled and must be turned on.



Double-click the Sub-Menus column for the item you want to edit, and a selection panel appears with checkboxes for all the Sub-Menus you want to add.

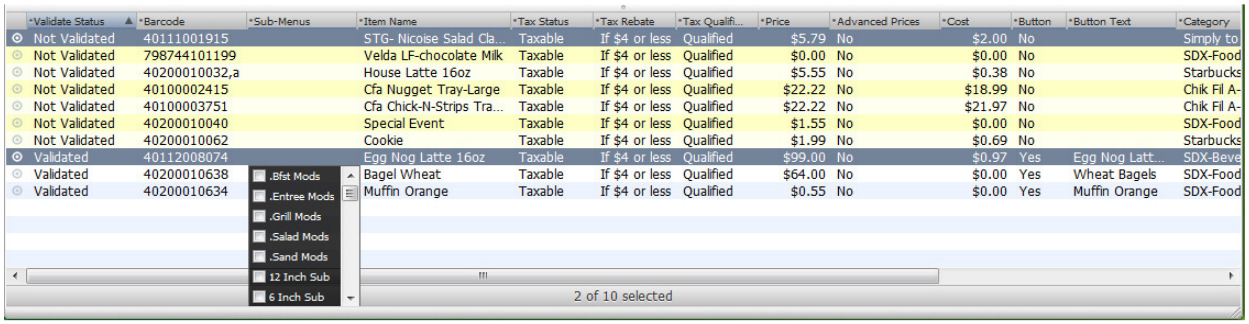


Check the Sub-Menus where you want the item to display.



Click anywhere on the screen outside the black checkbox panel to make it disappear and save your changes. The Sub-Menu selection will be included as part of the menu configuration when Broadcast is invoked.

Sub-Menus can be assigned to the items directly in a Profit Center.



When adding a Sub-Menu to a Master List item, the new addition of that Sub-Menu will be automatically propagated out to all the local list instances of that item.

If you remove a Sub-Menu from an item on the Master List it does not modify anything on any local list. If you make modifications to a local list item, be those changes additions or removals of Sub-Menus, those changes affect only that local list item.

If you remove a Sub-Menu from a local list item and from the corresponding Master List item, then add this Sub-Menu back to the Master List item, this scenario is covered by the behavior described above when adding a Sub-Menu to a Master List item.

The change is automatically pushed out to all corresponding local list items, including adding the Sub-Menu back to the local list item.

It is important to understand this behavior in order to avoid confusion.

Adding a Master Menu Item

- When an item is added to the Master List, a sub-category must be selected and a sub-menu is checked based on the selected sub-category.
- The sub-menu column displays the sub-menu selected for the item including the default inherited from the sub-category.
- The sub-menu column drop-down displays a check mark to reflect all sub-menus currently selected.
- Additional sub-menus can be selected for this item from the sub-menu column.
- You can change the settings inherited from the sub-category but need to have at least 1 sub-menu selected. The last checked sub-menu selection cannot be unchecked.
- All existing and new units that add the new item to their unit inherit these settings.

Modifying the Sub-menu Selection in Master Item

- The sub-menu selection of a master item can change if the sub-menu selected changes or if the item is moved to a different sub-category.
- If the sub-category is changed then the sub-menu associated with the old sub-category is deleted and the new sub-menu that matches the sub-category is selected.
- When there is a change to the master item, all subsequent additions to a unit inherit the revised settings. However, all existing units preserve their existing settings.

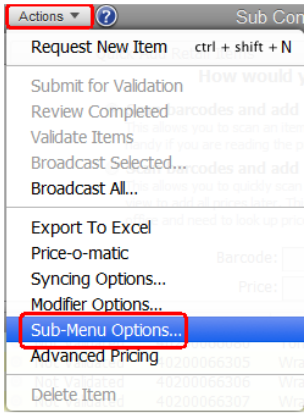
Deleting the Master Item

- When a master item is deleted, all existing unit level items at all locations are not deleted. The master item is no longer available for the new location or new unit level item creation.
- The removal of the associated unit level item is manually carried out by the unit level manager.

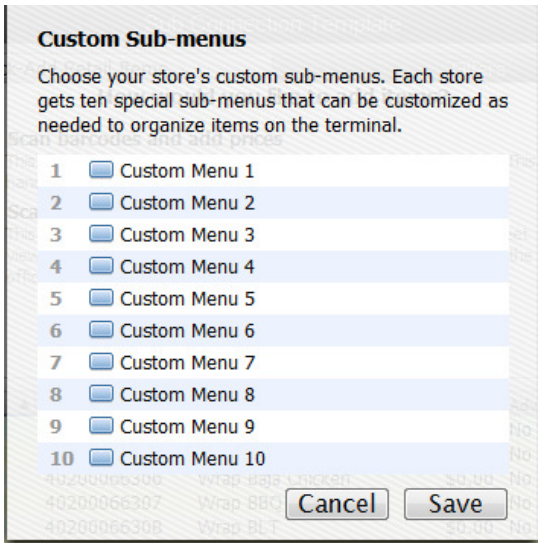
Unit Level Use Cases

Sub-menu Button Text Editor

1. Select the **Action** menu for the Unit.
2. Selecting the Sub-menu **Options** brings up a dialog that allows the unit manger to define the button text for 10 new sub-menus.



Defaults can be Custom Menu 1, Custom Menu 2, and Custom Menu 3 and so on. The editor allows changing these names.



The editor does not permit deleting or adding more custom sub-menus.

Sub-menu Drop-down Selector

The sub-menu drop-down selector at the unit level is populated with the set of sub-menus as follows:

- All currently selected (in use) sub-menus at the unit.
- All sub-menus that have been used in the past 6 months at the unit even though they are not currently selected.
- All sub-menus that are currently defined for the item at the Master List.
- There will be an additional 10 sub-menus available that are user-defined for each unit.
- The sub-menu button text is defined in a separate editor.

Adding a Menu Item to Unit

Add from a master menu item and it inherits all settings of the master item including the sub-menu selection(s) and button (yes/no). There is always 1 or more sub-menus defined in the Master List.

Changing a Sub-menu Selection on Item

- Sub-menu selection setting is displayed to the user as **Checked**.
- You can change the settings inherited from a Master item but need to have at least 1 sub-menu selected. The last checked sub-menu selection cannot be unchecked.
- You can change the button associated with the item to be **Yes** or **No**. However, the sub-menu selections continue to be selected. There can be multiple sub-menus selected with no button displayed.
- A sub-menu can be selected when the button is set to **No**.

Hiding Sub-menu Button when all Buttons in Sub-menu are 'No'

If all item buttons for a particular sub-menu are set to **No** then the sub-menu button is hidden.

The validated items for the sub-menu work with the scanning feature at the Terminal.

Hiding Sub-menu Button when At Least One Button in Sub-menu is set to 'Yes'

If at least one button for a particular sub-menu is set to **Yes** then the sub-menu button is displayed.

Deleting Sub-menu Selection

When an item is deleted from the unit, the export/import script reflects the change in state for the item so that it is deleted from all sub-menus along with the buttons on the Terminal.

Broadcasting Behavior for Custom Sub-menus

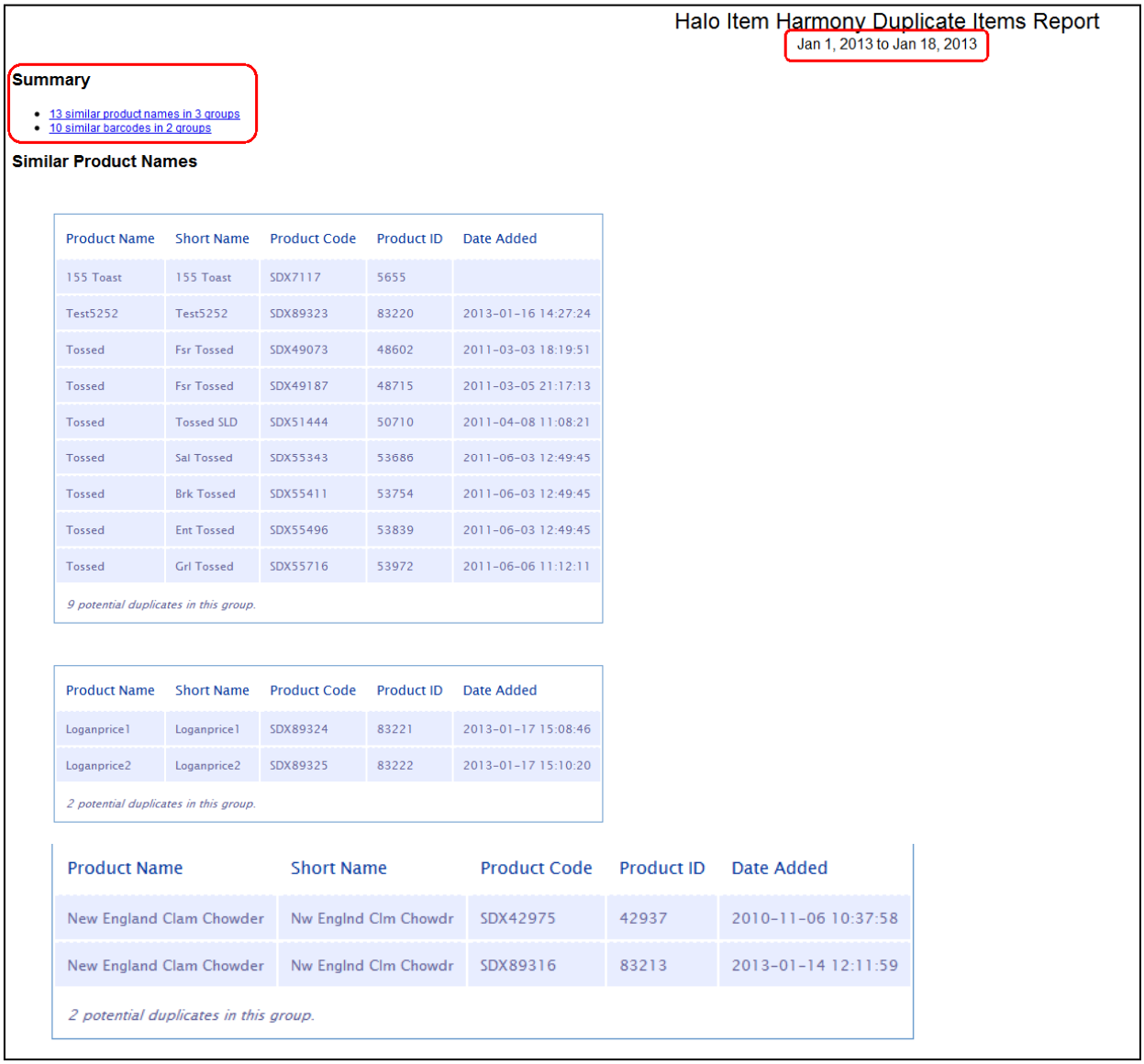
Broadcast has the following behavior:

- Each store's set of 10 custom sub-menus are never removed or affected by any broadcast operation, even if the broadcast is set to "empty first".
- All of an item's custom sub-menus are cloned over to the destination stores as "hidden" custom sub-menus that are not editable in that store's custom sub-menu interface, but will be selectable in the drop-down sub-menu selector and appear like a "normal" sub-menu.
- Only those custom sub-menus that are actually being used by the items being broadcast are cloned, not unused ones.
- If a custom sub-menu with the same name already exists at the destination store (whether hidden or not), the existing sub-menu and no duplicate is created.

Duplicate Item Report

The Duplicate Item report lists all duplicate items currently in the database. It can be used to help remove or merge these duplicate items. There are two main areas of the report, the **Similar Product Names** list and the **Similar Barcodes** list.

Similar Product Names



Halo Item Harmony Duplicate Items Report

Jan 1, 2013 to Jan 18, 2013

Summary

- 13 similar product names in 3 groups
- 10 similar barcodes in 2 groups

Similar Product Names

Product Name	Short Name	Product Code	Product ID	Date Added
155 Toast	155 Toast	SDX7117	5655	
Test5252	Test5252	SDX89323	83220	2013-01-16 14:27:24
Tossed	Fsr Tossed	SDX49073	48602	2011-03-03 18:19:51
Tossed	Fsr Tossed	SDX49187	48715	2011-03-05 21:17:13
Tossed	Tossed SLD	SDX51444	50710	2011-04-08 11:08:21
Tossed	Sal Tossed	SDX55343	53686	2011-06-03 12:49:45
Tossed	Brk Tossed	SDX55411	53754	2011-06-03 12:49:45
Tossed	Ent Tossed	SDX55496	53839	2011-06-03 12:49:45
Tossed	Grl Tossed	SDX55716	53972	2011-06-06 11:12:11

9 potential duplicates in this group.

Product Name	Short Name	Product Code	Product ID	Date Added
Loganprice1	Loganprice1	SDX89324	83221	2013-01-17 15:08:46
Loganprice2	Loganprice2	SDX89325	83222	2013-01-17 15:10:20

2 potential duplicates in this group.

Product Name	Short Name	Product Code	Product ID	Date Added
New England Clam Chowder	Nw Englnd Clm Chowdr	SDX42975	42937	2010-11-06 10:37:58
New England Clam Chowder	Nw Englnd Clm Chowdr	SDX89316	83213	2013-01-14 12:11:59

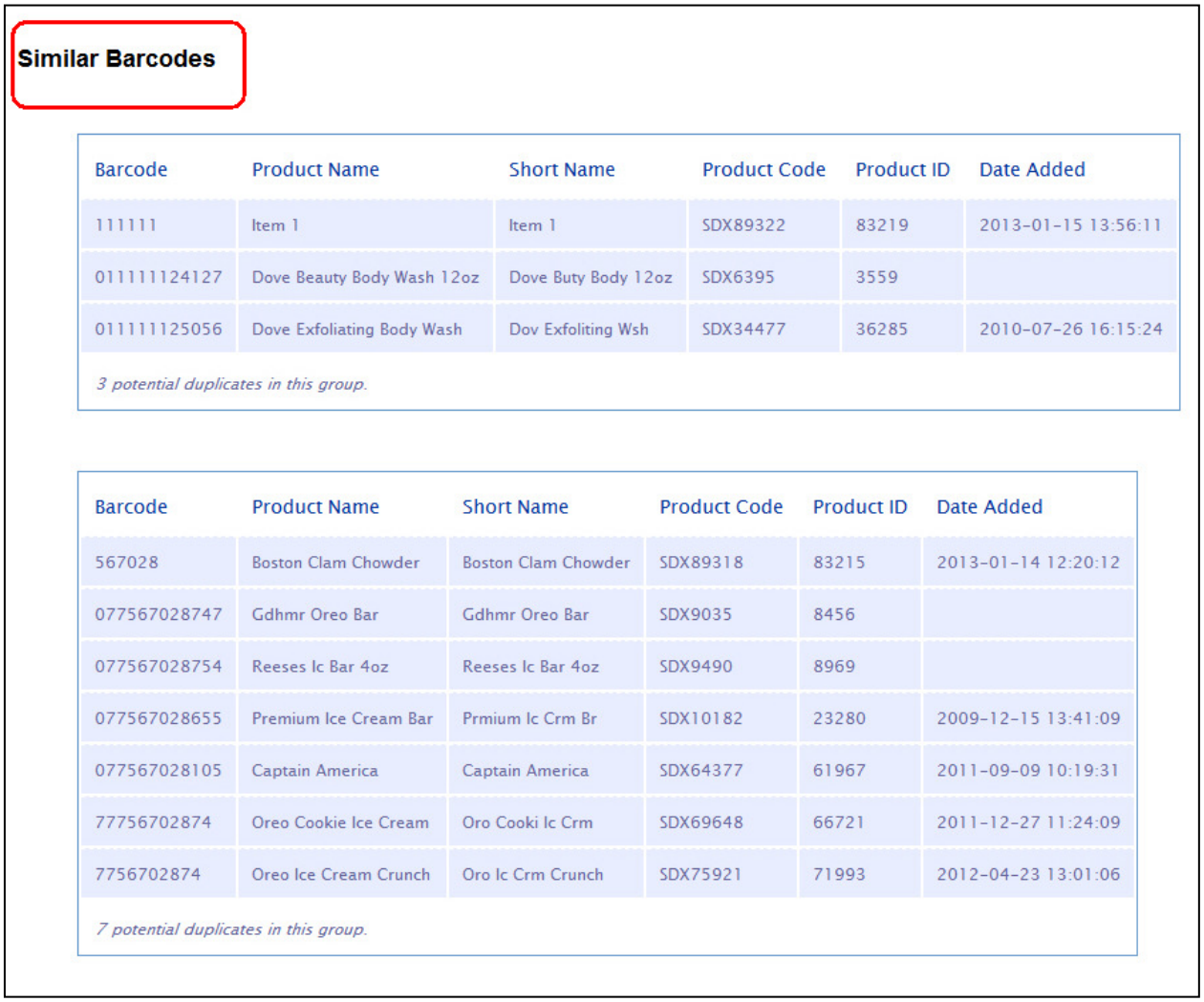
2 potential duplicates in this group.

Start and End Date - The duplicate item report is sent out using a start and end date.

The Start date must be specified, but can be run with no end date.

Summary - Totals of the report are at the top under the Summary.

Similar Barcodes

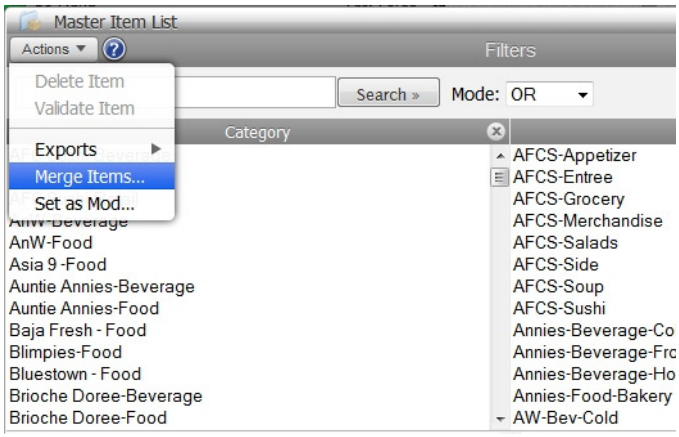


Report Similar Product Name - Case insensitive list of all similar product names.

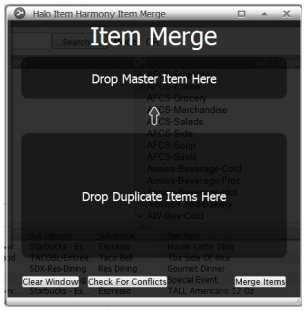
Barcode Comparison - Lists all barcodes the same or similar – barcode needs to be at least half of the same numbers to be a match.

Item Merging

Item merging is used for duplicate items that are found in the Duplicate Item report to take the results of that report and merge those items if necessary.



A separate window opens allowing you to drag and drop your items into it and merge them.



First you use the Duplicate Item Report to figure out your duplicates, and then merge them using this window. Go into the Master List and drag the items to this merge window.

1. Open the Item Merge window.
2. From your Master List, drag your duplicate items and drop them into the Item Merge window.
3. Click **Check for Conflicts** (this check occurs when you click Merge Items as well)

   Check for Conflicts – Clicking this button checks to see if the dragged items are in use at the store level – if they are, then it is not possible to merge them.

   If conflict message is displayed then a list of stores using the item is included, along with the number of times it is used (in red bubble). The export of the list is in .CSV format for easy access to Excel.

   Note: Is not possible to use the **Merge Item** button if there is a conflict and a warning screen is displayed if that is the case.

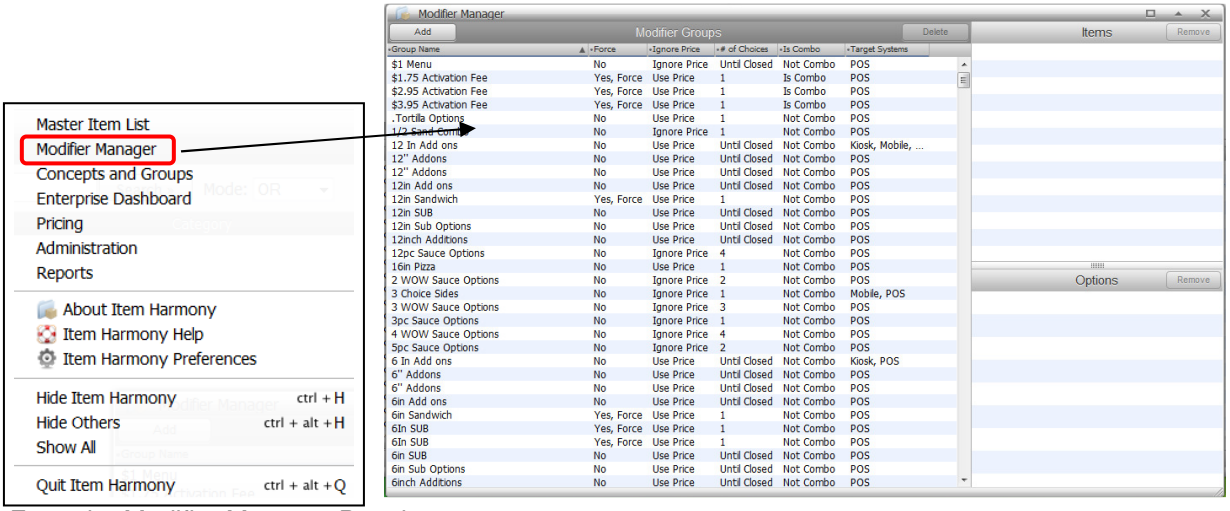
4. Once your conflicts are resolved (or you do not have any conflicts) click the Merge Item button to complete the merge.

When using barcodes the merge adds the barcodes to the item as it can have multiple barcodes.

Clear Window – Click this button to clear the contents of the window.

Modifier Management

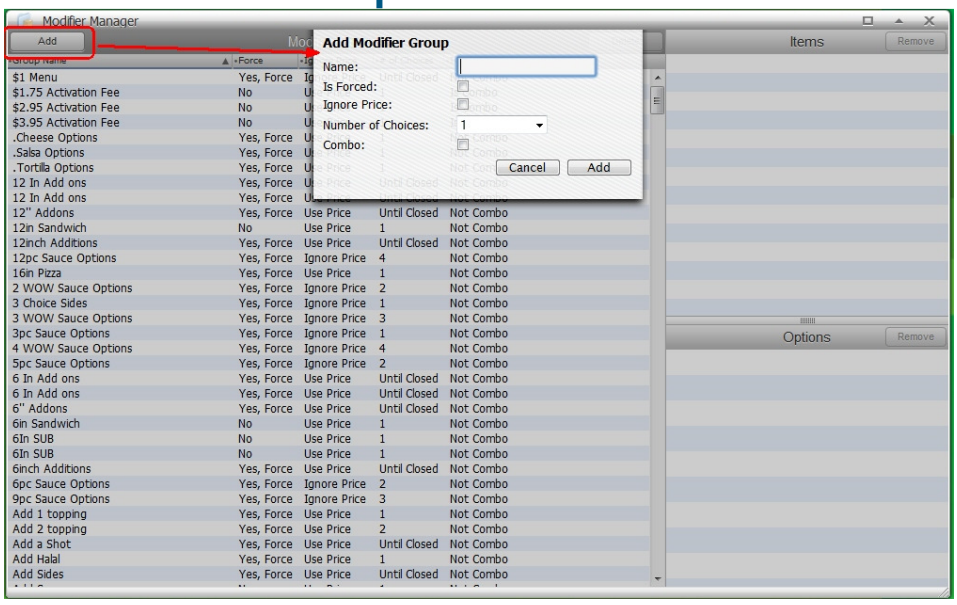
The Modifier Manager window is accessed through the Item Harmony menu drop-down list.



From the Modifier Manager Panel you can:

- Add a modifier group and enter options or change them.
- List the items in each group.
- Change the order in the options pane.
- Change the Target System for each entry.

Add Modifier Group

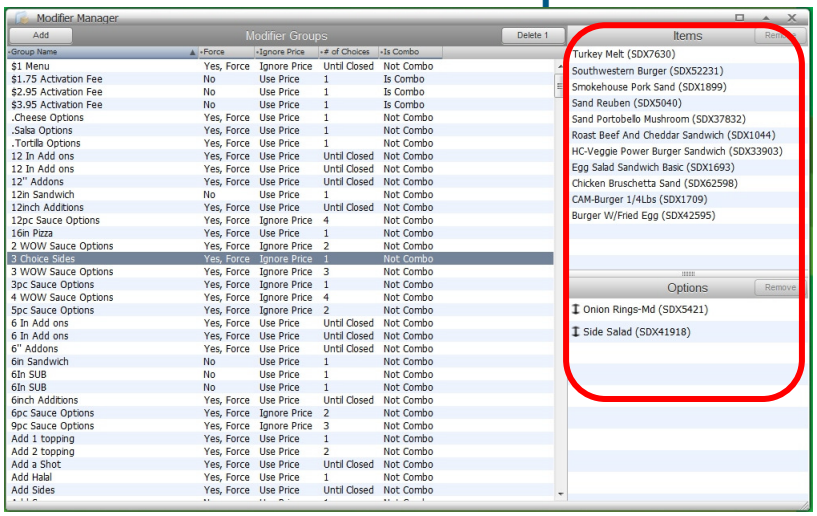


From the Add Modifier Group window you can enter all details about the Modifier Group such as **Name**, **Is Forced, Ignore Price, Number of Choices,** and **Combo** that correspond to the columns in the Modifier Manager window.

Note: There is also a Modifier button on the Store window that takes you to the same Modifier Manager Panel.

If you have more than one store open then you can see all the modifiers for those stores (double-click to open).

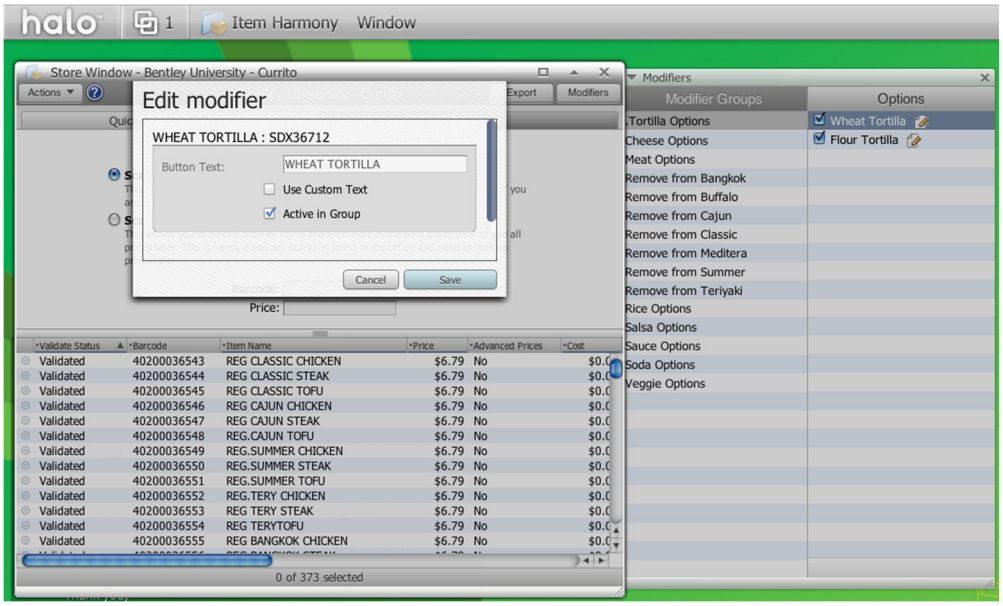
List Items in Modifier Groups



If you select an existing item you can see the Items and the Options in the two right-hand panes.

Using **the Store Location** window you can edit a Modifier using the Edit Modifier window. If you click the "pencil" next to the item then it opens the **Edit Modifier** window. There are two checkboxes, "active in group" and "use custom text".

There is also an Indicator if an item is **Active** or not in this window. The item has a checkmark next to it if it is an Active item.



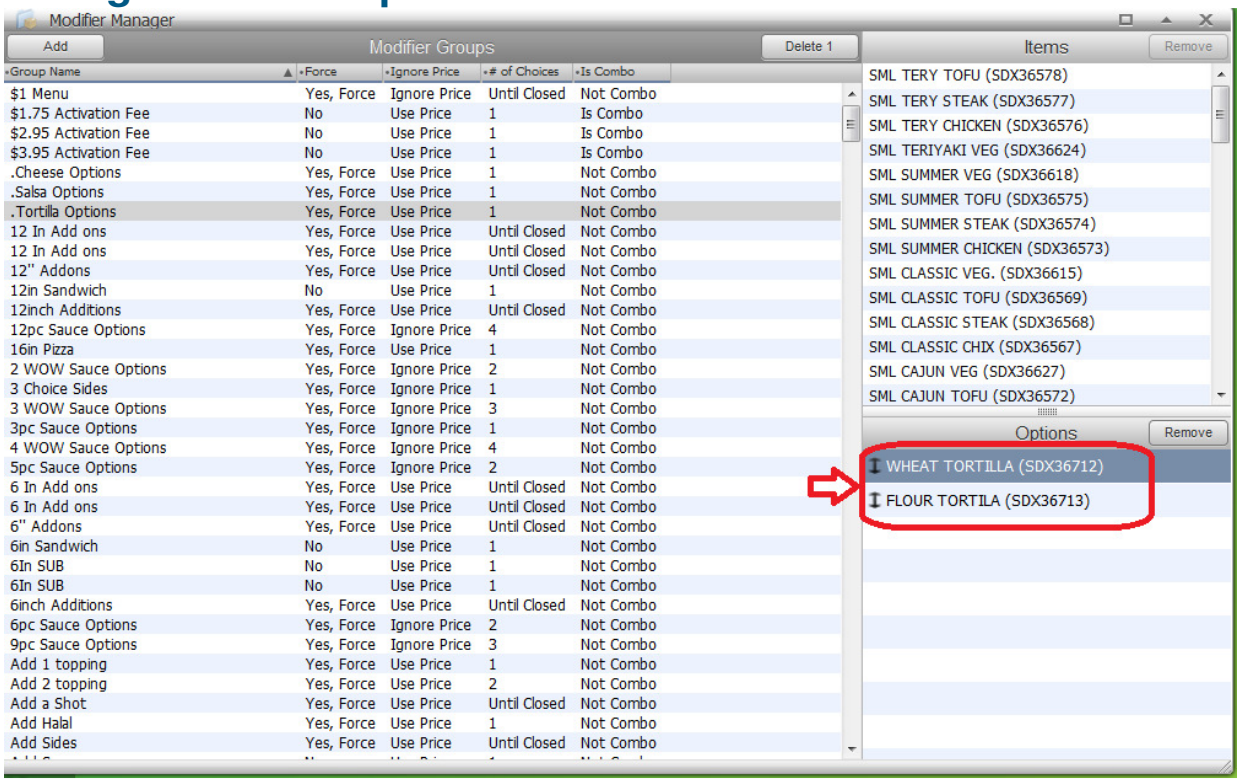
Use Custom Text – if the button name is different than what is in the window then this is checked, or you can check this to change the button name. Otherwise it is greyed out.

Active in Group – An item added is not active until checked.

Admin adds item to group – The item needs to be active and needs to be approved as well.

Add a group not in store – add a Modifier Group and it is now added to the modifier groups list.

Change Order in Options Pane



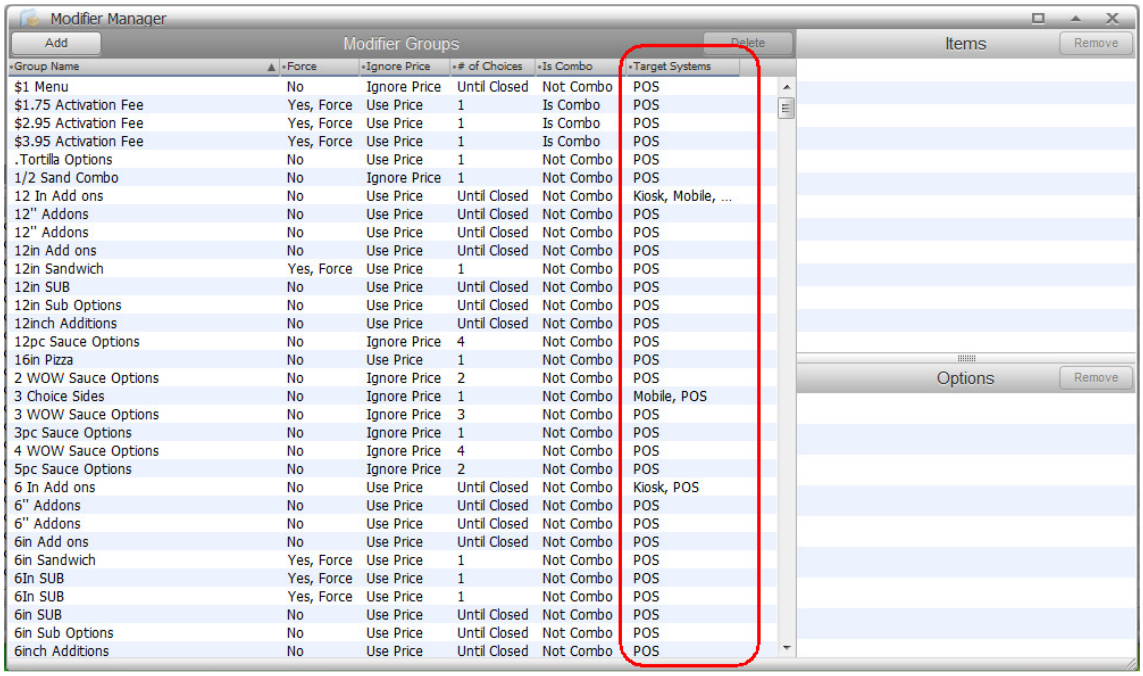
You can also change the order of the options from the Modifier Manager window. In the example above if you highlight an option in the right-hand pane, you then can drag it up or down to set its position in the option listing. Any item with the arrow to the left of it can be moved in this manner.

Important Note: Order sort can only be used at the Master level, not the Store level.

Target System (Forced Item Modifiers)

The Target System column in the Master Mod group User Interface allows you to specify which platforms should use the group (For example, Mobile/POS/Kiosk).

Important: Before you start checking or un-checking these column entries, please refer to the Halo Modifier Request spreadsheet to ensure the correct Modifiers are used/created for Target Systems (POS, Mobile, or Kiosk). ***If Target Systems are incorrectly changed for a Modifier it impacts the Items that Modifier is assigned to.***

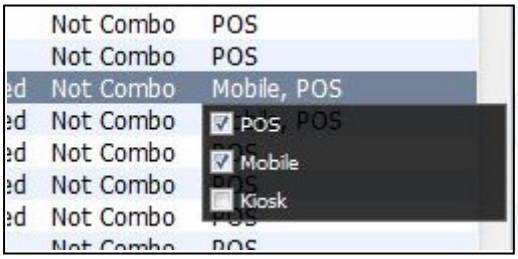


Group Name	Force	Ignore Price	# of Choices	Is Combo	Target Systems
$1 Menu	No	Ignore Price	Until Closed	Not Combo	POS
$1.75 Activation Fee	Yes, Force	Use Price	1	Is Combo	POS
$2.95 Activation Fee	Yes, Force	Use Price	1	Is Combo	POS
$3.95 Activation Fee	Yes, Force	Use Price	1	Is Combo	POS
.Tortilla Options	No	Use Price	1	Not Combo	POS
1/2 Sand Combo	No	Ignore Price	1	Not Combo	POS
12 In Add ons	No	Use Price	Until Closed	Not Combo	Kiosk, Mobile, ...
12" Addons	No	Use Price	Until Closed	Not Combo	POS
12" Addons	No	Use Price	Until Closed	Not Combo	POS
12in Add ons	No	Use Price	Until Closed	Not Combo	POS
12in Sandwich	Yes, Force	Use Price	1	Not Combo	POS
12in SUB	No	Use Price	Until Closed	Not Combo	POS
12in Sub Options	No	Use Price	Until Closed	Not Combo	POS
12inch Additions	No	Use Price	Until Closed	Not Combo	POS
12pc Sauce Options	No	Ignore Price	4	Not Combo	POS
16in Pizza	No	Use Price	1	Not Combo	POS
2 WOW Sauce Options	No	Ignore Price	2	Not Combo	POS
3 Choice Sides	No	Ignore Price	1	Not Combo	Mobile, POS
3 WOW Sauce Options	No	Ignore Price	3	Not Combo	POS
3pc Sauce Options	No	Ignore Price	1	Not Combo	POS
4 WOW Sauce Options	No	Ignore Price	4	Not Combo	POS
5pc Sauce Options	No	Ignore Price	2	Not Combo	POS
6 In Add ons	No	Use Price	Until Closed	Not Combo	Kiosk, POS
6" Addons	No	Use Price	Until Closed	Not Combo	POS
6" Addons	No	Use Price	Until Closed	Not Combo	POS
6in Add ons	No	Use Price	Until Closed	Not Combo	POS
6in Sandwich	Yes, Force	Use Price	1	Not Combo	POS
6In SUB	Yes, Force	Use Price	1	Not Combo	POS
6In SUB	Yes, Force	Use Price	1	Not Combo	POS
6in SUB	No	Use Price	Until Closed	Not Combo	POS
6in Sub Options	No	Use Price	Until Closed	Not Combo	POS
6inch Additions	No	Use Price	Until Closed	Not Combo	POS

This allows for Vivonet Mobile or Kiosk functionality where a modifier group can be applied to an item, but not impact the Halo POS touch screen experience for Cashiers if that modifier group is for use only in the Vivonet Mobile or Kiosk product.

Allowed values to be checked are:

- **POS** – The most common target, this is checked for the POS Terminal.
- **Mobile** – This selection is checked when using the Mobile App.
- **Kiosk** – This selection is checked when using the Kiosk.



Any combination of these values can be checked so they are listed in the Modifier Management window.

To change the **Target System** column values:

1. Open the **Master List** and access the Modifier Manager window using the Item Harmony menu drop-down list.
2. Locate the **Target Systems** column and the Modifier(s) that you want to check or un-check. Double-click in the Target Systems column to open the drop-down list.
3. Placing a check mark in each box enables the Modifier for that product – **POS, Mobile**, or **Kiosk**.

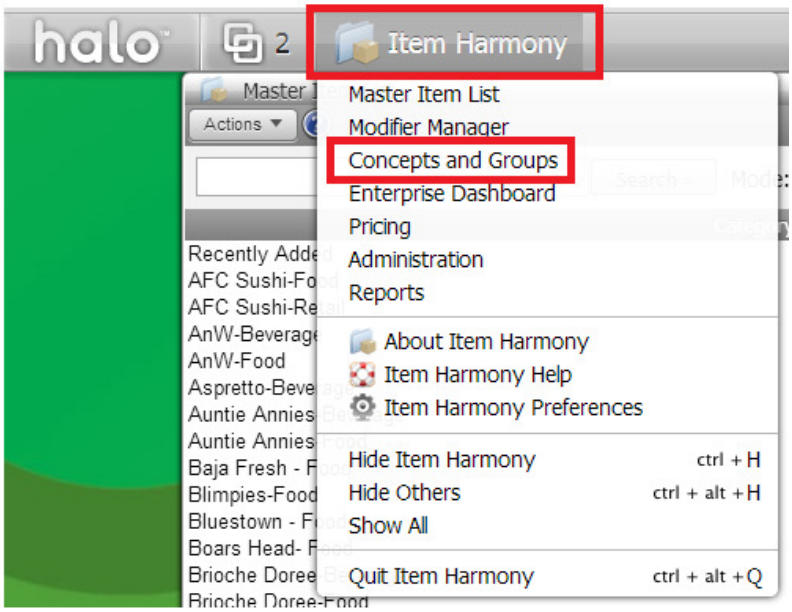
Data Importing

Important: You must have Admin privileges to perform Data Importing.

1. Open the Excel Menu Item file and confirm the following **Columns** are included:
   - **Required Columns:** ***Item Name*** **and** ***Sub-Category***
   - **Optional Columns:** ***Barcode***, ***Button Text*** **(short name),** ***Recipe Number*** **and** ***Portion Unit***
2. Check the **Master Item List** and confirm that all the **Sub-Categories** are available.

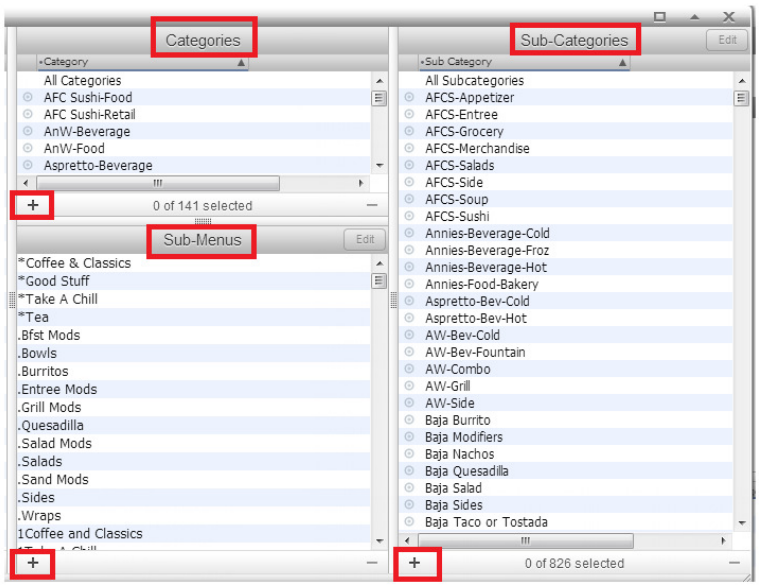
Adding a New Category / Sub Category

3. Click the **Item Harmony** tab and select **Concepts and Groups.**



Before adding a new *Category*, *Sub-Category* and *Sub-Menu*, please make sure that it has not been created yet.

4. Click the “+” to add any new *Category*, *Sub-Category* or *Sub-Menu.*

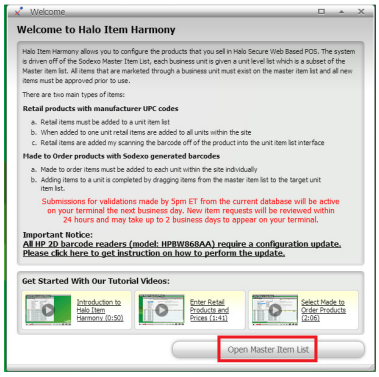


5. Convert the Menu Item Excel file into a **CSV (Comma delimited)** file (Save As).

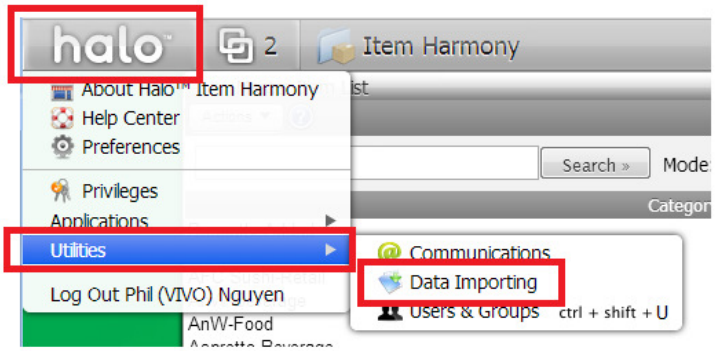
6. Log into Item Harmony.



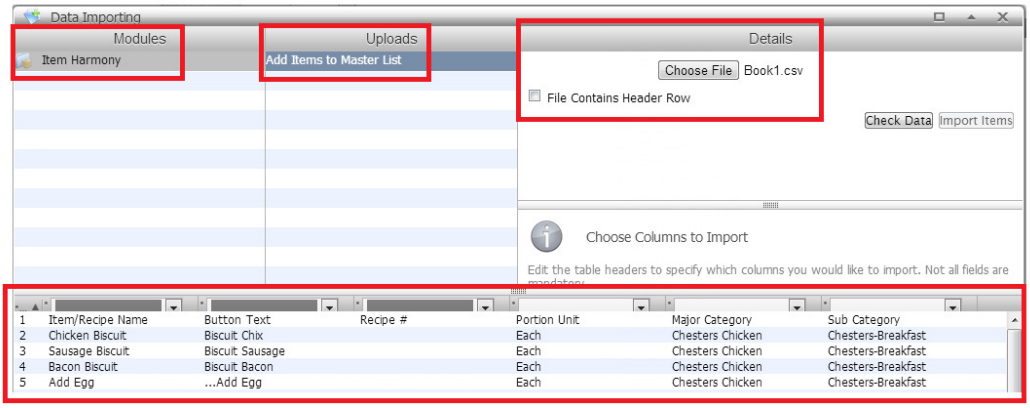
7. Open the **Master Item List**.



8. Click the **Halo** tab, select **Utilities** and then click **Data Importing.**

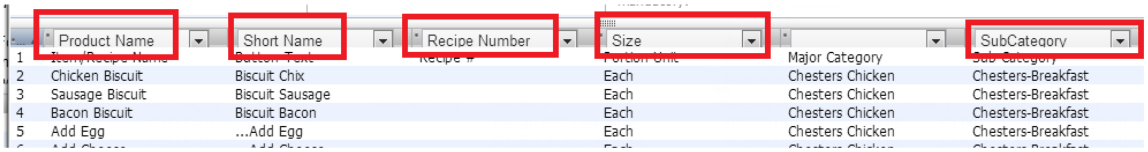


a. Under **Modules**, click **Item Harmony**.
b. Under **Uploads**, click **Add Items to Master List**.
c. Under **Details**, click **Choose File** and select the Menu Item Excel CSV file.
d. Uncheck the **File Contains Header Row** checkbox.



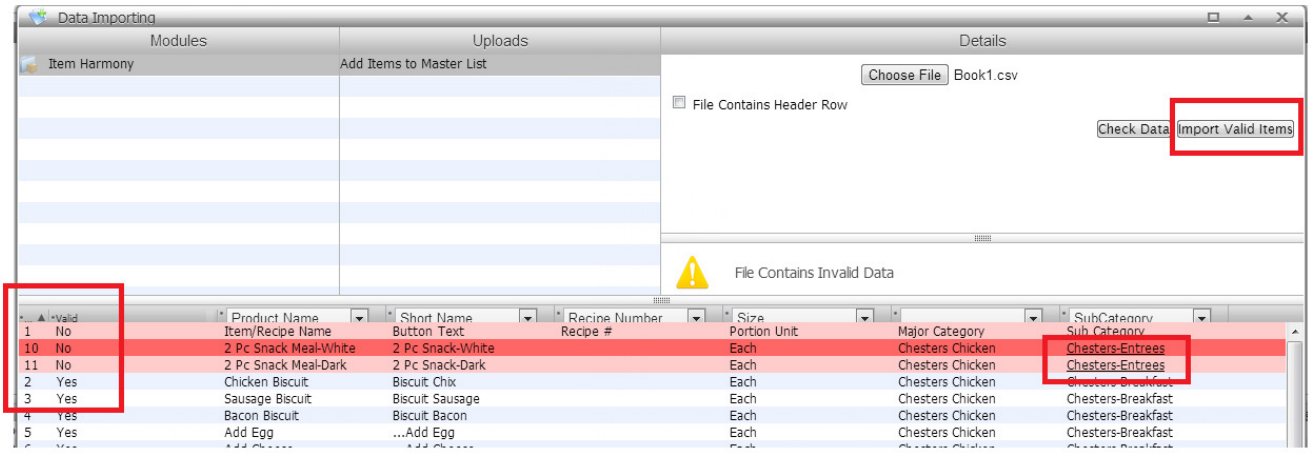
9. In the menu window below, select the appropriate column types:

- **Required Columns: *Item Name* and *Sub Category***
- **Optional Columns: *Barcode*, *Button Text* (short name), *Recipe Number* and *Portion Unit***



Note: The **Category** column is not required. When selecting the **SubCategory** it automatically confirms the **Category**

a. Click **Check Data** to validate all the details.
b. The first column now confirms if the items are **valid.**
c. Any items that are **highlighted** red are **invalid.**
d. Any invalid information is **underlined** (Example below: Chesters-Entrees).
e. Users can down left-click in the field to update the information (Example below: since "Chesters-Entrees" is not recognized as a Sub Category, you need to remove the "s" on the end and then hit the **Check Data** button again).



10. Once the menu items below are valid, click **Import Valid Items** to import them into Item Harmony's Master Item List.

11. Close the **Master Item List** and re-launch the window to view the newly imported menu items.

Item Harmony: Support Contact Information

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