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Quick Service: Cashier's POS Manual

Last Updated: January 2012

VIVONET

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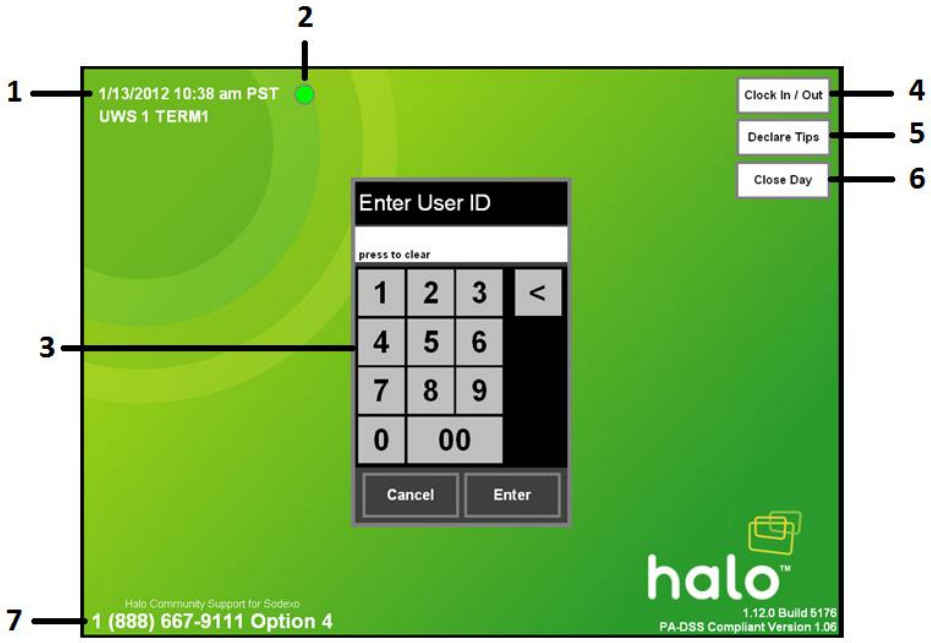
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I. Introduction

POS Sign-in Screen



1. Register Date, Current Time and Time Zone
Current date and time used for Halo Reports.

2. Connectivity Indicator Light
Green: connected to the internet and able to process credit and store valued cards.
Yellow or Red: the terminal is offline. Credit Card and Cash transactions can still be completed in offline mode.

3. Sign-in Pad
Used to enter a user's POS ID to sign into the register.

4. Clock In / Out
Type your POS ID and select Enter. Clock in will track the time when the employee signed in for the current day. Clock out will track when the employee clocks out for the day.

5. Declare Tips
Used to declare cash tips for your cashout report.

6. Close Day
Ensures system is ready for the next day.

7. Halo Community Support: **1.888.667.9111 Option 4**
24 hours a day - 7 days a week

Connectivity Indicator Light



Green= Connected to the internet and able to process credit and stored value cards.

Yellow= Weak Internet Signal.

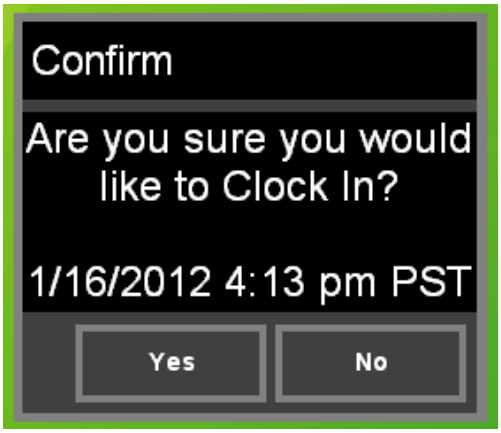
Action: Please check local internet connection.

Red= No Internet Connectivity and/or Enterprise Manager is not connected.

Action: Please check local internet connection**.** If local internet connection is fine, please continue to process transactions. If the Connectivity Indicator light continues to stay red for longer than an hour, then please call **HALO Community Suppor**t: **1.888.667.9111 Option**

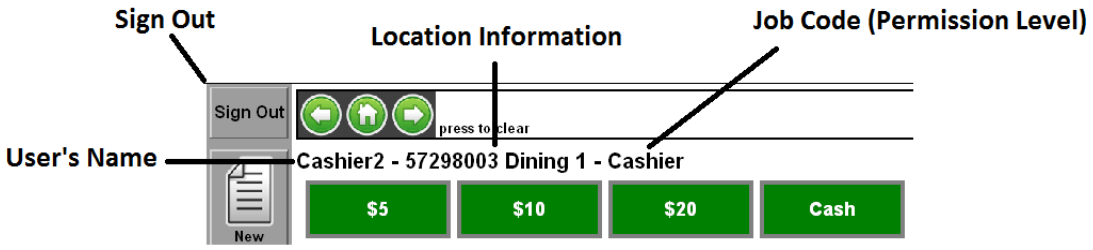
Sign In / Sign Out

Depending on your Job Code, Halo will ask the user to "*Clock in*", when signing in for the first time. Select **YES** to start your day.



Sign in Confirmation

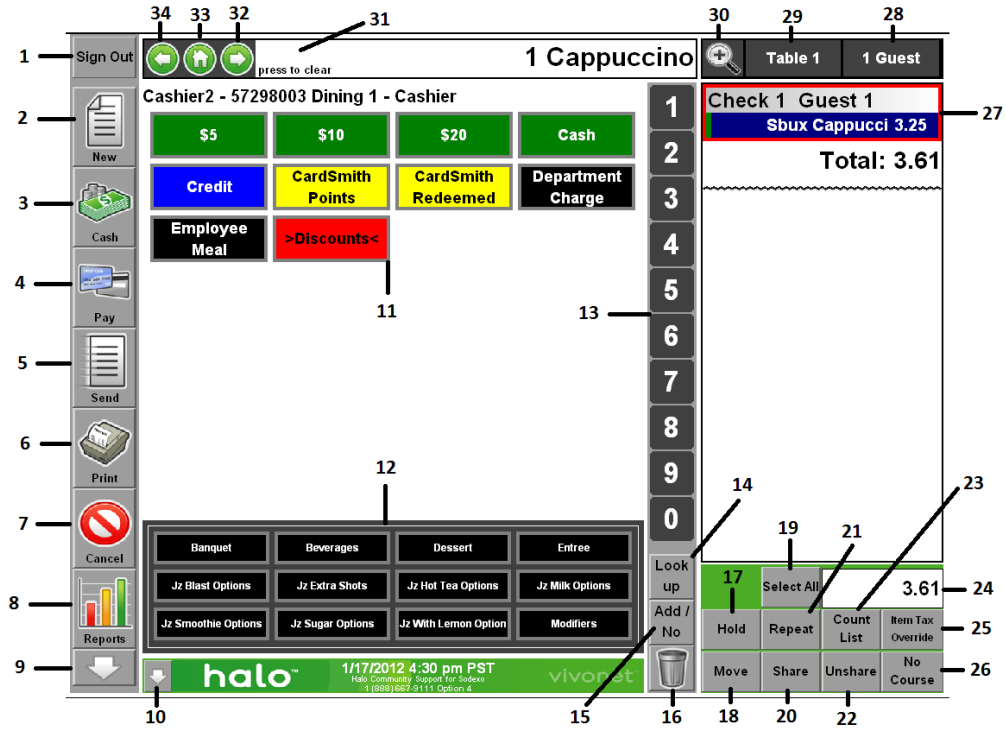
When a user signs in, their first name, location's information and Job Code will appear along the top.



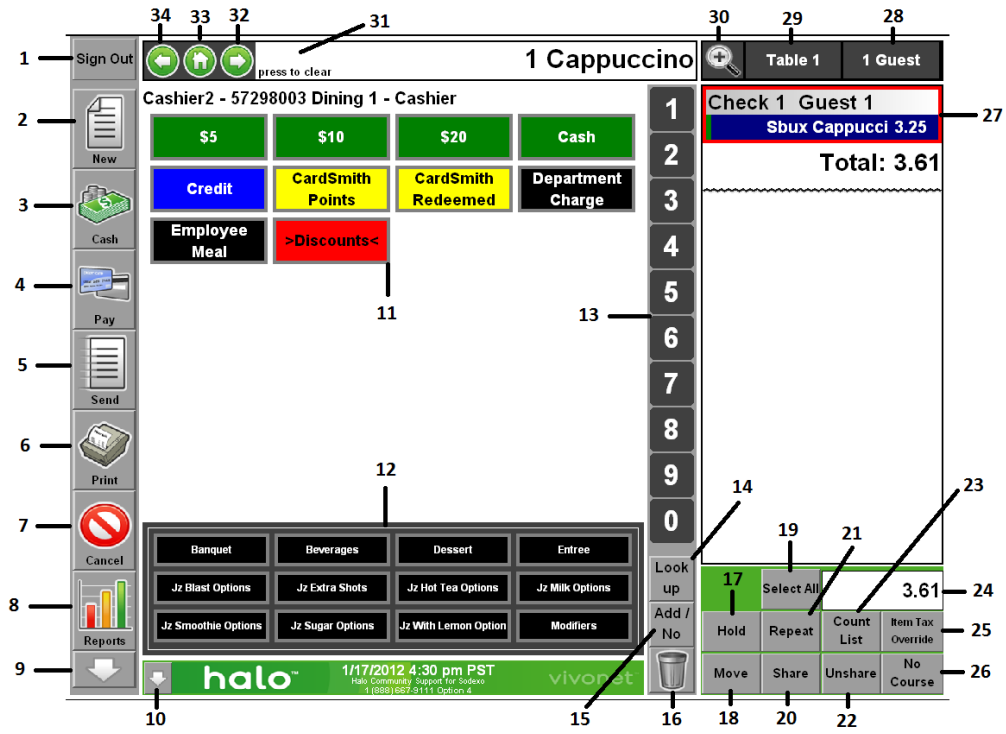
Sign Out

If a user needs to step away from the register, they need to **Sign Out** so that another user does not ring up any sales under the wrong user. When the user needs to access the register again, they can use the number pad to sign back in.

First-Level Command Bar Functions

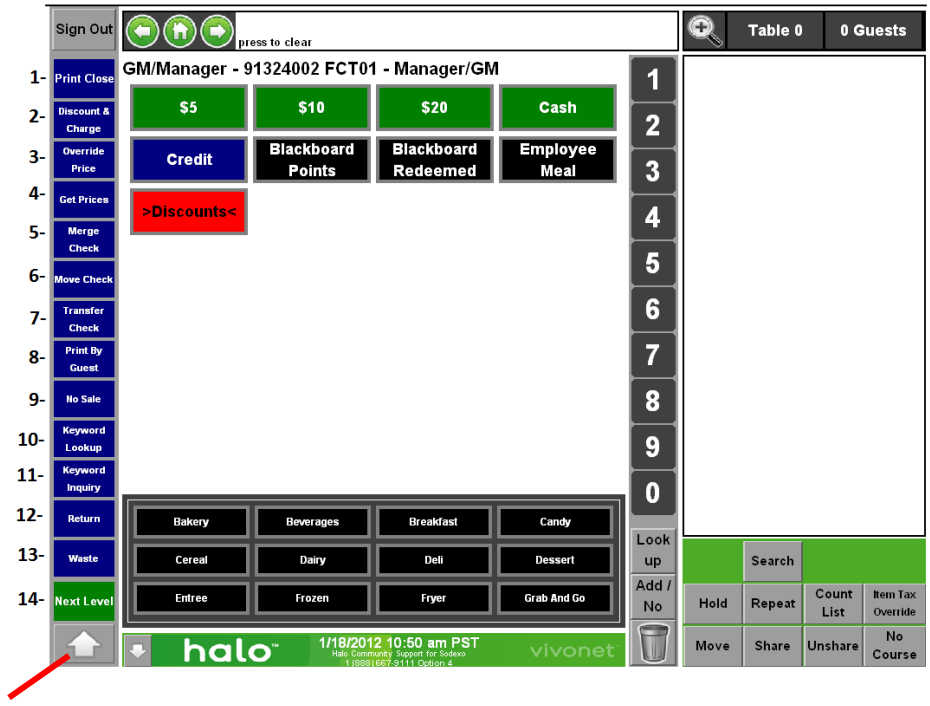


1. **Sign Out:** Allows user to exit HALO to the POS Sign-in screen.
2. **New:** Open new Check.
3. **Cash:** Shortcut to cash Tender.
4. **Pay:** Opens payment selection group, displays tenders.
5. **Send:** Send unsent menu items.
6. **Print:** Prints customer checks.
7. **Cancel:** Cancels all items on check.
8. **Reports:** Shortcut to local report groups.
9. **Arrow:** Navigates to Second and Third level functions.
10. **Scroll down Arrow:** Scrolls down to additional Sub Menu Buttons.
11. **Main Menu Group:** Displays main menu group of tender and discount keys.
12. **Navigation Group:** Displays Sub Menu buttons.
13. **Numeric Bar:** Allows user to order items by quantity, by selecting the number of items before ordering.
14. **Look Up:** Search items by barcode.
15. **Add/No:** Type text messages on the check.
16. **Trash:** Allows user to remove selected items from current check. (Error Correction)
17. **Hold:** Allows user to hold back selected items from printing on the chit.



18. **Move:** Allows user to move selected items to another guest on the same check.
19. **Select All:** Highlights all the items on the current selected check.
20. **Share:** Share an item's cost with one or more guests.
21. **Repeat:** Repeat allows you to repeat selected items on a check.
22. **Unshare:** Undo the share function.
23. **Count List:** Displays items with counts.
24. **Check Total:** Displays the check total.
25. **Item Tax Override:** Remove tax for non-taxable items.
26. **No Course:** Allows user to define courses for selected items. (Courses will print on the chit)
27. **Check View:** Displays the current user's open check.
28. **Guest:** Allows user to change the number of guests on the check.
29. **Table:** Allows user to change the table number.
30. **Show Check Screen:** Enlarges table and check view area.
31. **Press to Clear:** Clears the text in the history bar.
32. **Forward Arrow:** Move forward one menu group.
33. **Home:** Return to the main menu group.
34. **Back Arrow:** Go back one menu screen.

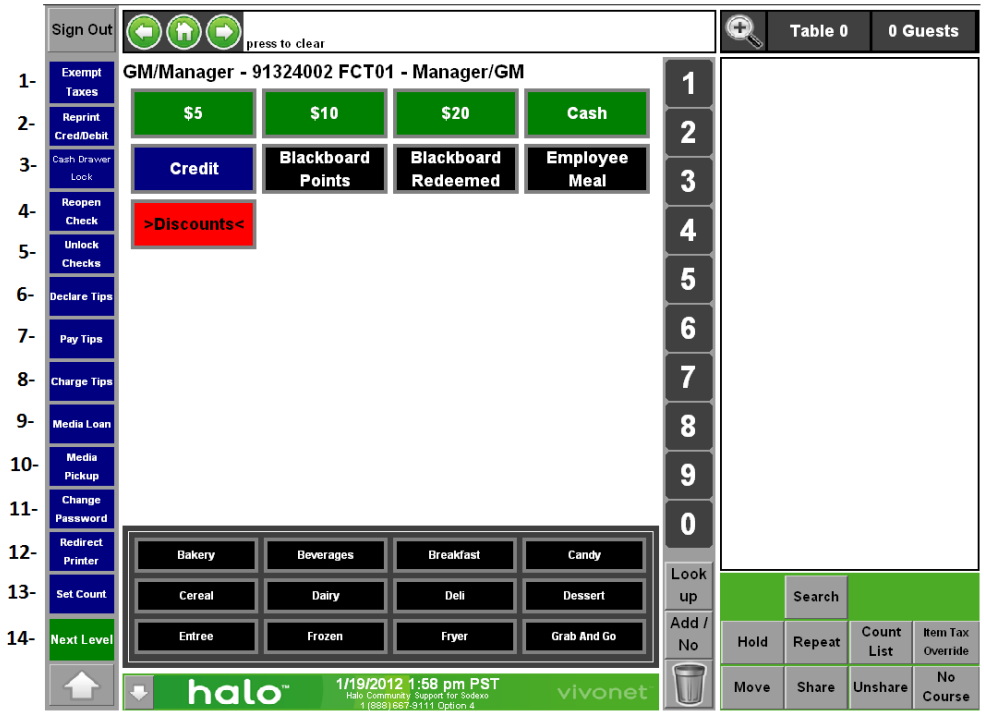
Second-Level Command Bar Functions



To access the Second-Level Command Bar Functions, select the arrow on the bottom left of the Command Bar

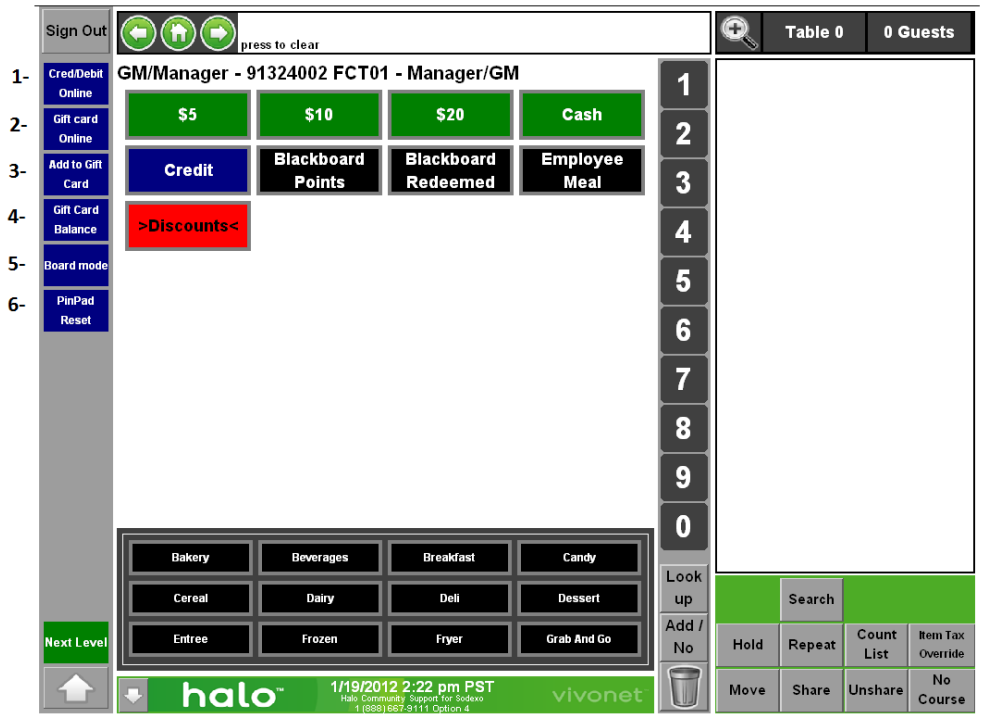
1. **Print Close:** Performs server cash-out and generates a summary of transactions and tenders. All checks must be closed or transferred in order to perform this function.
2. **Discount & Charge:** Displays all discounts and service charges.
3. **Override Price:** Allows a privileged user to override prices on selected menu items.
4. **Get Prices:** Quick price check by items.
5. **Merge Check:** Allows user to merge (add) one check into another. Also allows user to split a check if it was merged and/or have a check added to an existing guest's check.
6. **Move Check:** Allows user to move check from one person to another within the same table, or to move a check to another table.
7. **Transfer Check:** Allows user to move a check into the general check view for transferring to another user or location. The check is highlighted in green and is then visible to all servers.
8. **Print by Guest:** Allows user to print all individual guests on a single check.
9. **No Sale:** Open cash drawer without performing a sale.
10. **Keyword Lookup:** Allows user to find and order an item by entering in all or part of the item name. (This function will allow a user to ring the item in from the display window)
11. **Keyword Inquiry:** Allows user to find and check price, on an item by entering in all or part of the item name. (This function does not allow a user to ring the item in from the display window)
12. **Return:** Allows user to ring in an item as a refund.
13. **Waste:** Allows user to record an item as waste.
14. **Next Level:** Allows user to access the next level of command bar functions.

Third-Level Command Bar Functions



1. **Exempt Taxes:** Allows user to exempt selected taxes from Check.
2. **Reprint Credit/Debit:** Allows user to reprint a credit slip.
3. **Cash Drawer Lock:** Allows user to assign the cash drawer to an employee.
4. **Reopen Check:** If feature is enabled, this allows a manager to re-open a previously closed check.
5. **Unlock Checks:** Will unlock a check that appears as locked.
6. **Declare Tips:** Allows user to declare direct or indirect tips.
7. **Pay Tips:** Allows a privileged user to pay charged tips to servers.
8. **Charge Tips:** Allows user to add a tip to the credit card payment on a closed check.
9. **Media Loan:** Allows a privileged user to declare the amount of cash in their cash drawer.
10. **Media Pickup:** Allows user to record a drop of excess cash out of the cash drawer.
11. **Change Password:** Allows a privileged user to change their POS ID.
12. **Redirect Printer:** Allows user to redirect output to another printer.
13. **Set Count:** Allows user to record a quantity for an item which will appear on the item's button.
14. **Next Level:** Takes you to Fourth-level Command Bar Functions.

Fourth-Level Command Bar Functions



1. **Cred/Debit Online:** Sets Halo to offline mode for Credit Card transactions.
2. **Gift card Online:** Sets Halo to offline mode for Store Value Cards.
3. **Add to Gift card:** Allows you to add money to Store Value Card.
4. **Gift card Balance:** Allows you to check the available balance on a Store Value Card.
5. **Board Mode:** This mode allows an item to be sold repeatedly in a board/cafeteria environment and can only be processed with integrated student card.
6. **PinPad Reset:** Allows user to reset the PinPad. (If Applicable)

II. POS Workstation Functions

These functions are available to a user after signing in.

Cash Drawer Lock or Unlock (Assignment)

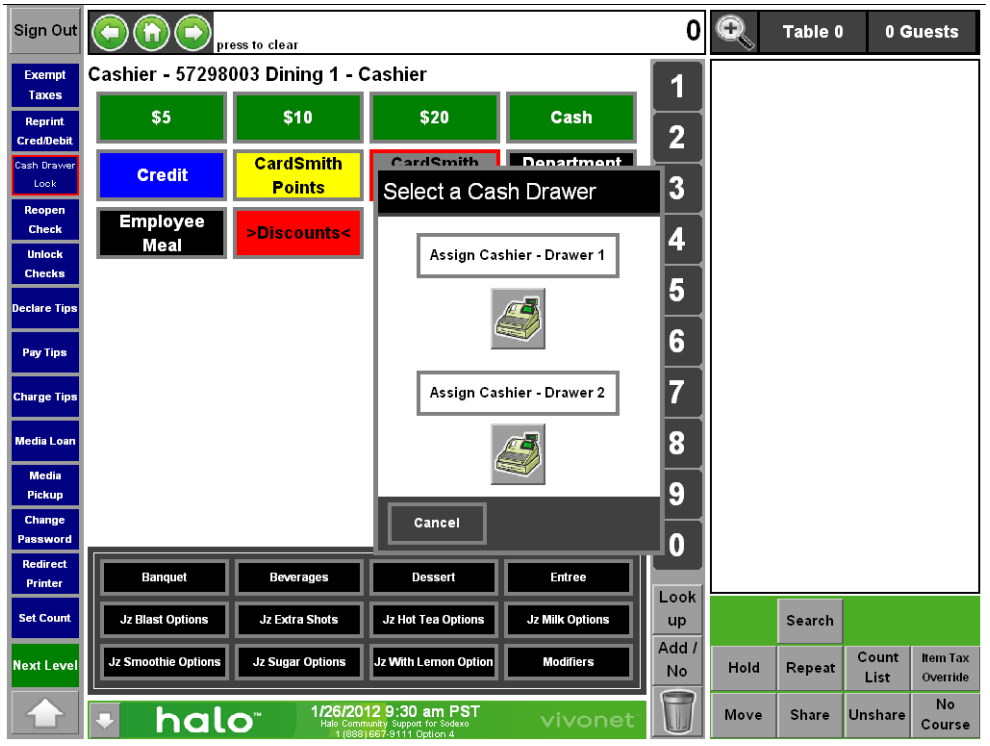
Allow a user to assign the cash drawer to an employee. The cash drawer will only open on cash transactions for the assigned employee.

1. Press **Cash Drawer Lock** from the Third-Level Menu Functions.

2. Select **Cash Drawer 1 or 2** to assign the drawer to the current cashier**.**
(The Cash Drawer will remain assigned to this user until it is un-assigned)

3. To un-assign the drawer, press **Cash Drawer Lock**.

4. Select the cashier drawer that was assigned to un-assign.



Media Loan

This record the amount of cash placed in the cash drawer, such as at the start of a shift.

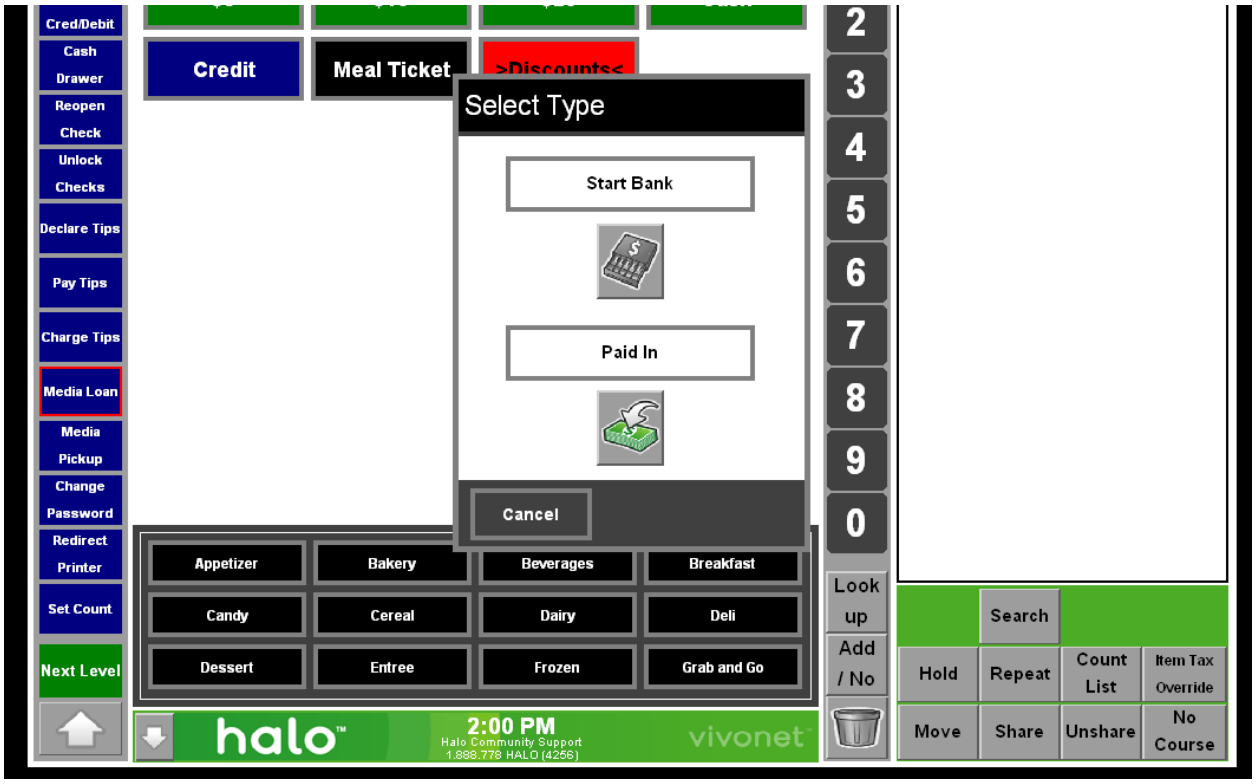
1. Select **Media Loan** from the **Third-Level Menu Functions**.

2. Select **Start Bank** or **Paid in**.

   - **Start Bank** records a float given to an employee at the beginning of their shift.
   - **Paid In** records cash added to an employee's cash that was not generated from a sale.

3. Enter the user ID of the employee accepting the cash.

4. Enter the amount. (This function requires management authorization)



Media Pickup

This records cash removed from the drawer, such as a "drop", "paid out", or "deposit", of excess large bills.

1. Select **Media Pickup** from the **Third-Level Menu Functions**.

2. Select **Pickup**, **Paid Out**, or **Deposit**.

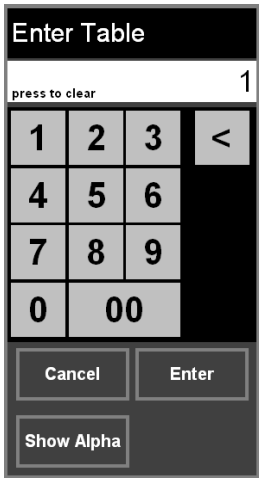
- **Pickup (Drop)** records excessive cash removed from an employee's cash.
- **Paid Out** records cash used to pay petty cash expenses, and requires the user to enter a reason.
- **Deposit** records the actual cash In drawer at the end of a shift (This function requires management authorization)

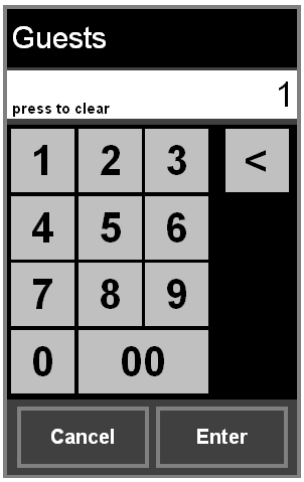


Begin a Guest Check

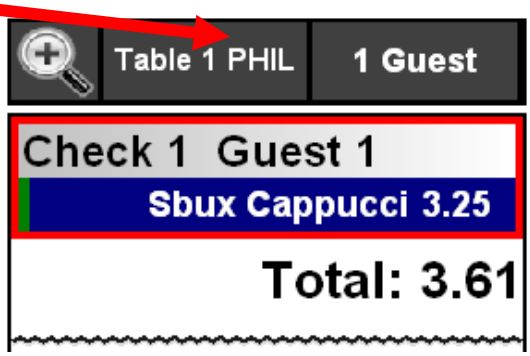
Depending on this system's configuration, the POS may not prompt for table number or guests.

1. Select the **NEW** Button  to start a new guest check, or simply press a menu item key.
2. If you are prompted for **Table**, enter a table number or description from the alphanumeric pop-up window.
3. If you are prompted for **Guests**, enter the number of guests from the numeric pop-up window.





Show Alpha allows a user to add a name/text to the check. (This will also print on the receipt)



Post a Menu Item

Select a menu will automatically open up a new check for the customer.

Forced Modifier

If the menu item has required condiments, a pop-up window displays and prompts the user to choose one or more selections. The number at the top of the window indicates how many choices remain. To post the menu item without entering all required selections, select done.

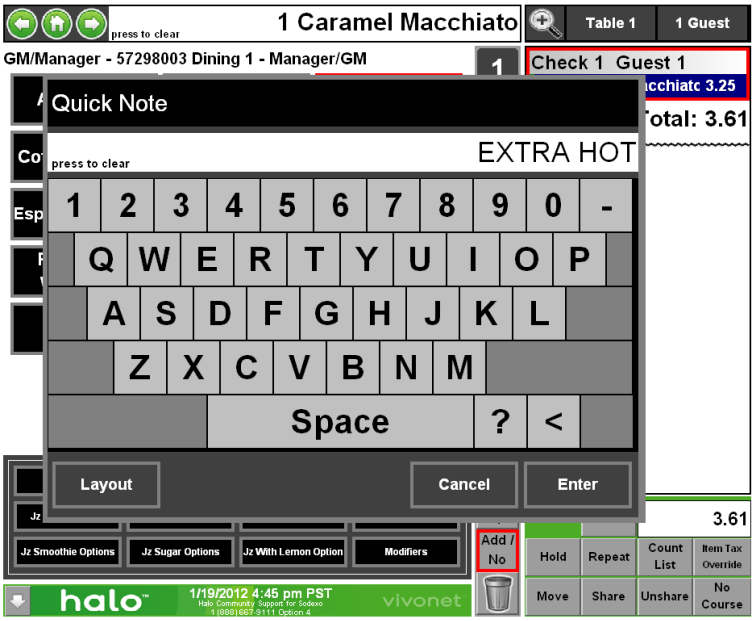
Add Menu Item Condiments

Condiments cannot be added to menu items from previous service rounds, and cannot be changed once a tab has been SENT, even using **'Add/No'**. If there are multiple condiments, choosing to trash one actually trashes them all, necessitating that all condiments be re-add.

1. Highlight a menu item and press **Add/No.**

2. Select condiments to add or delete from the preparation of this menu item, or type text comments that will print in the kitchen or bar with this menu item.

3. Select **Enter**.



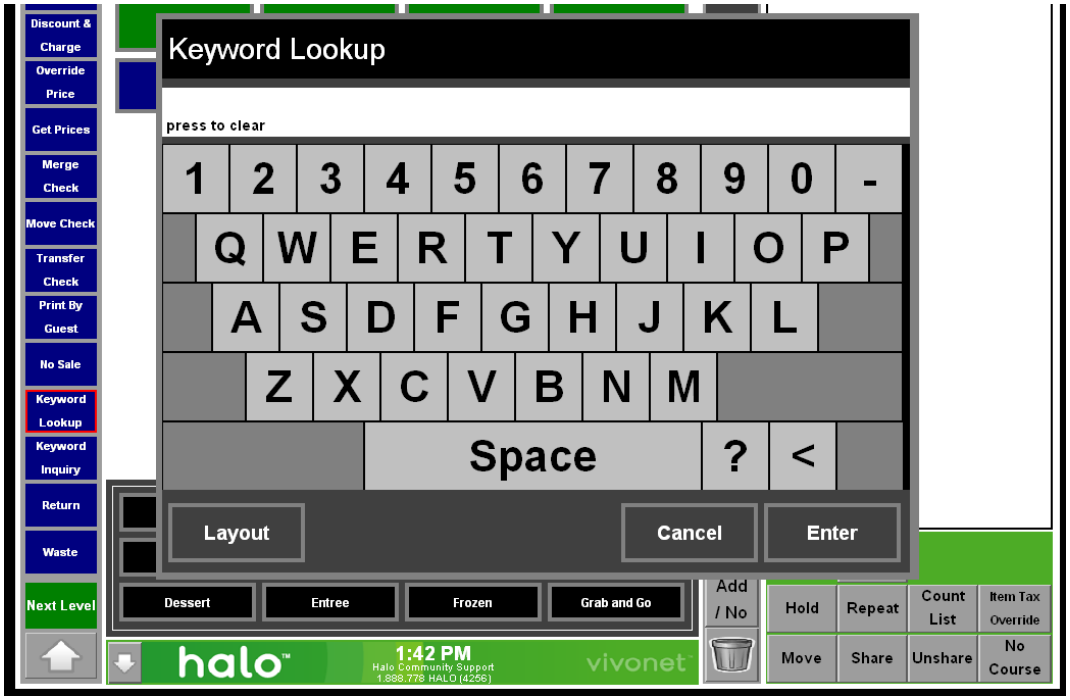
Keyword Look-up

Allow you to find an item by entering all or part of the name of the item. You can order the item from this screen.

1. Press **Keyword Lookup** and type in part of the item description from the Second-Level Menu Functions.

2. Press any item on the search results to add it to a check.

3. Press **Cancel** to exit the search results window.



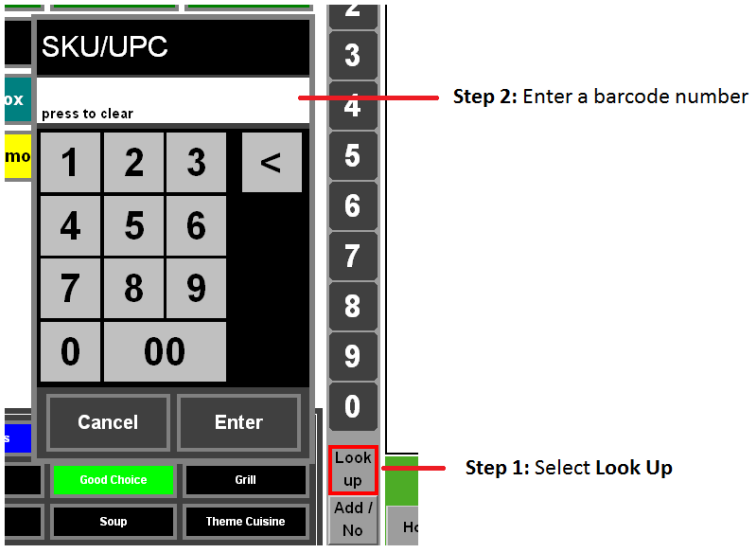
Look Up

Allow you to find a bar-coded item by entering the barcode number (minimum 4 consecutive numbers).

1. Press **Look Up** and type in barcode number.

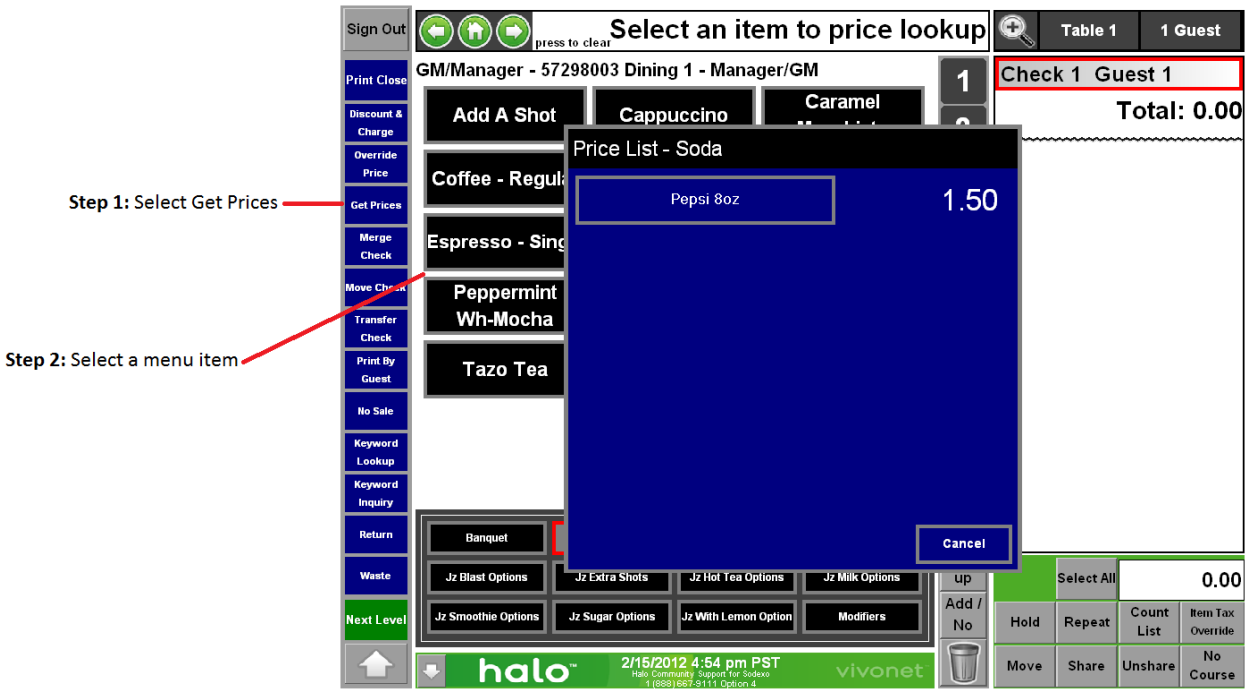
2. The item will automatically be added to the check. (If the item is not found, it will need be to added in Item Harmony before the new item can be selected)

3. Press **Cancel** to exit the search results window.



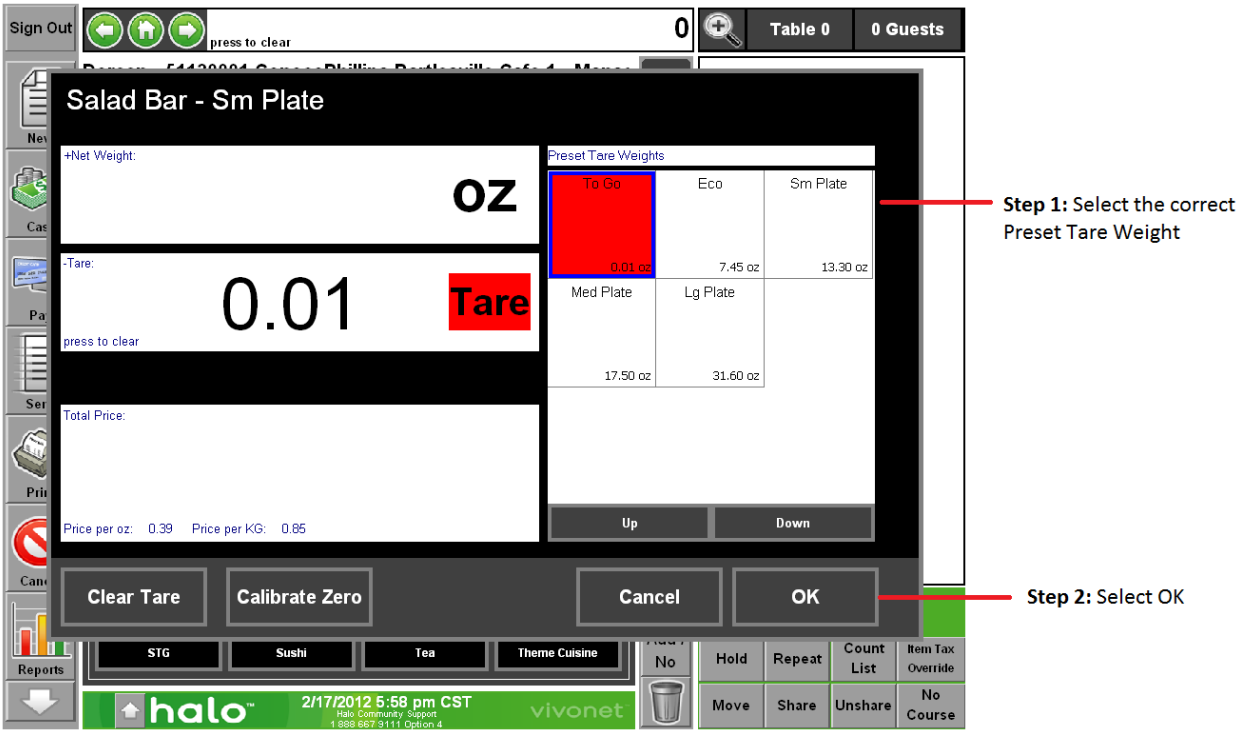
Get Prices

1. Select Get Prices from the Second-Level Command Bar Functions.
2. Select the menu item that you are seeking price for.
3. A price list window will pop-up displaying the menu item and any price(s) that have been created for that item.
4. If you wish to add the item on the check, select the item.
5. Enter a manager's authorization code and press enter. (If Applicable)



Using a Scale

1. Ask the customer to place the item on the scale.
2. Select the item button that is assigned to prompt for price by weight.
3. Select the **Preset Tare Weights** and then select **OK**.



Post a Discount

Halo uses menu item discounting. A discount may be applied to one or more menu items. Discounts configured for your system may be fixed (the value is configured in the system).

Specific Item Discount

1. Select a check.

2. Select **Discount & Charge** from the Second-Level Command Bar Functions or from the Discount Sub Menu button on the Main Menu group. A pop-up window will display a button for each discount available.

3. Select the menu item(s) to be discounted. If the entire guest check needs to be discounted, press the **Select All button** at the bottom of the display.

4. Select the appropriate Discount button. A discount displays in red beneath each discounted menu item on the guest check.



Discount All

1. Select a check.

2. Select **Discount & Charge** from the Second-Level Command Bar Functions or from the Discount Sub Menu button on the Main Menu group. A pop-up window will display a button for each discount available.

3. Select the appropriate Discount button. A discount displays in blue on the guest check.

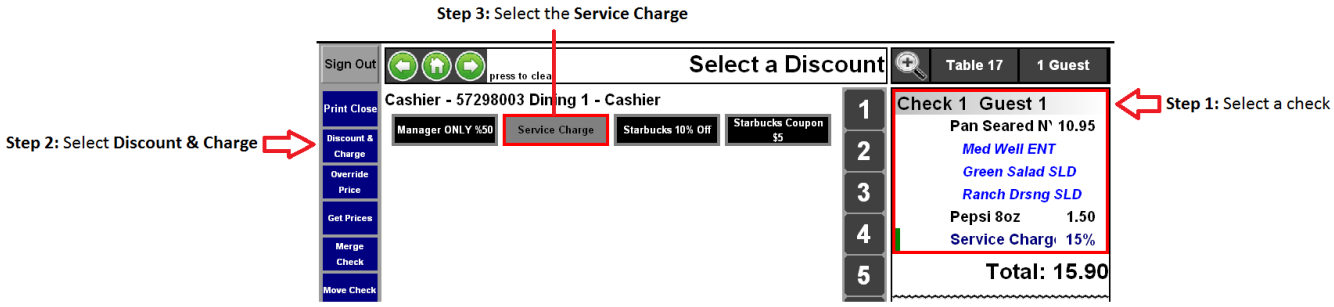


Post a Service Charge

1. Select a check.

2. Select **Discount & charge** from Second-Level Command Bar Function or from the Discount Sub Menu button on the Main Menu Group. A pop-up window will display a button for each service charge available.

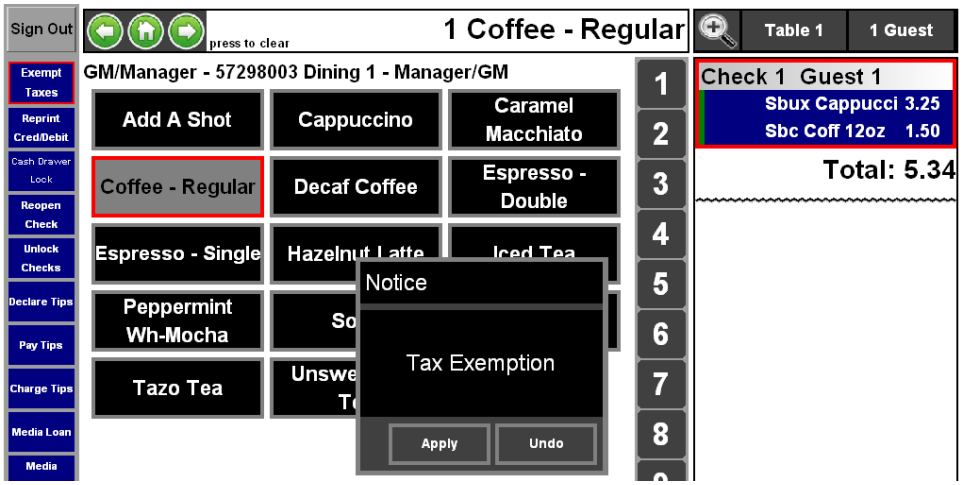
3. Select the appropriate Service Charge button. The service charge displays in blue at the bottom of the guest check detail.



Exempt Taxes

1. Select item or groups of items, and select **Exempt Taxes** from the Third-Level Menu Functions.

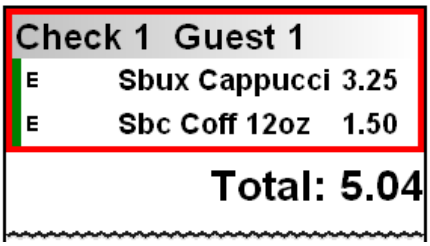
2. Select **Apply** to exempt taxes, or undo to re-apply taxes that were previously exempted.



3. If the Tax Exemption pop up window displays. Type the Tax Exempt ID (if applicable) and select Enter.

4. Depending on the user's permissions level, authorization may be required.

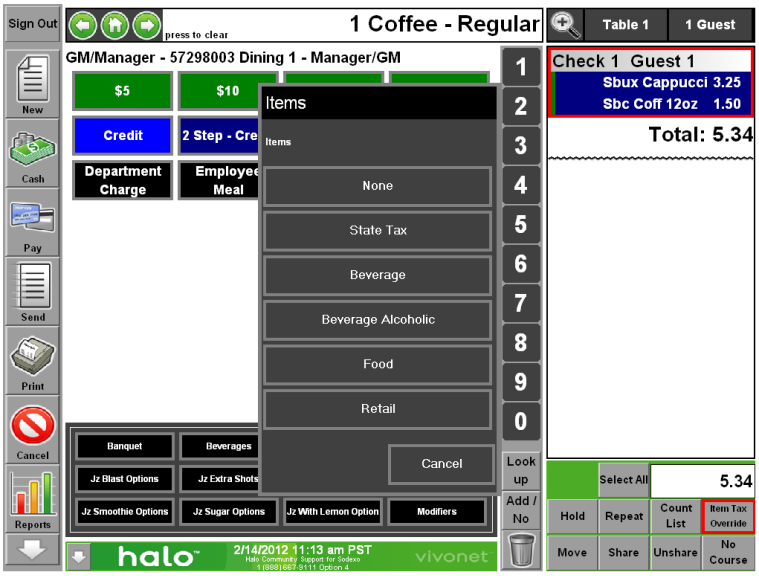
5. An **"E"** displays beside the item(s) on the guest check, indicating the exemption.

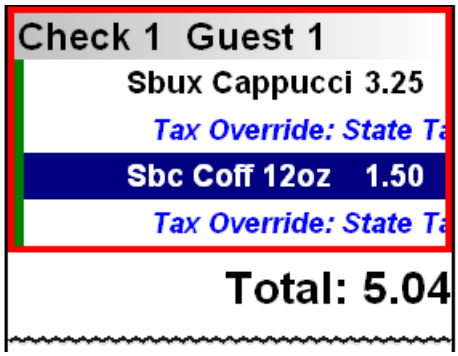


Item Tax Override

1. Select item or groups, and select **Item Tax Override**.

2. A list will appear, allowing you to select an Item Tax Override option.





Post a Payment

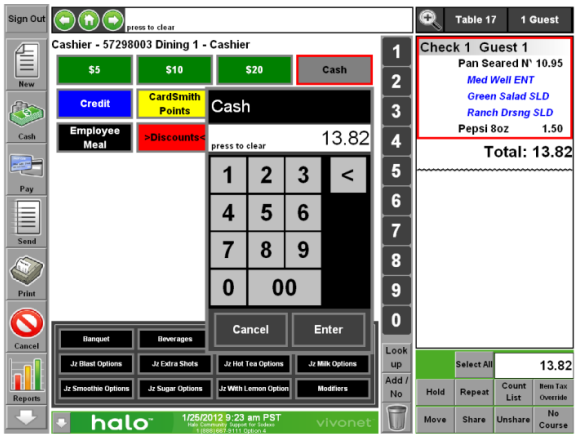
1. Select a check.

2. Select a tender from the Main Menu Group or select Pay 

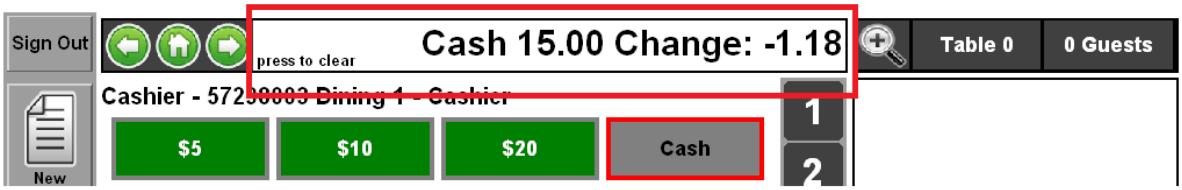
to display all methods of payments (select Cash 

for cash transactions only).

3. Choose the preferred method of payment. A pop-up window displays the amount due for this check.

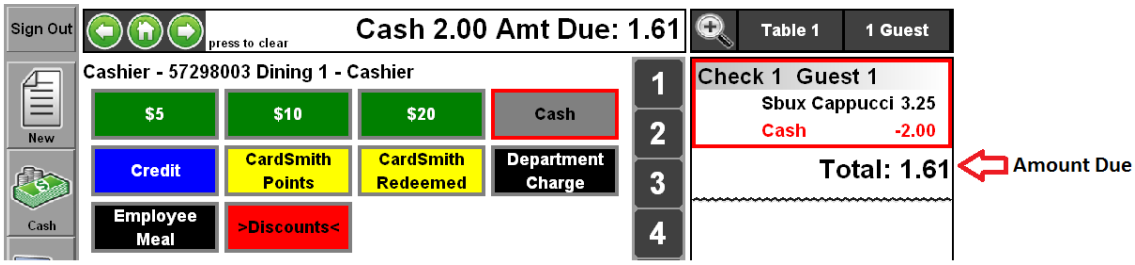


4. Accept this amount or type the amount tendered, and select Enter. If the amount of the payment is greater than or equal to the amount due, the check is closed. The amount paid and any change due display at the top of the screen.



Split Tender

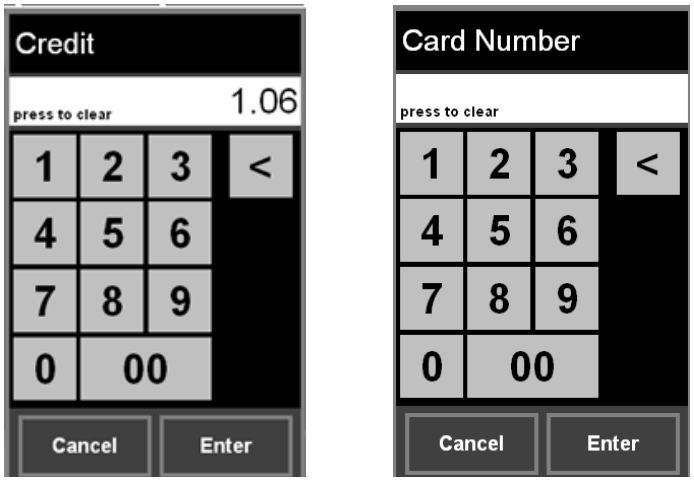
If the amount of the payment is less than the amount due, the check will still be open with the remaining owing. The user has the option to select another tender to close the check.



One Step Credit Card Payment

1. Select **Credit**

2. **Select Enter to accept this amount**, or type an amount (e.g., a partial payment) and select Enter. A pop-up window displays for the card number.



3. Swipe the card through the reader, the expiration date was entered automatically. If you type the credit card number, a pop-up window displays. Type the date and select Enter. The check detail displays the following in red the word Authorizing, followed by the card type, followed by the payment amount. The system contacts the credit card processor.

- If the authorization request is **Approved**, the card type is replaced by a string of asterisks (***) and the last four digits of the credit card.
- If the request is **denied**, the check detail displays Declined, and the line is highlighted in yellow.
- If the credit card processor is out of communication (down), the check detail displays **Credit Unavailable**, and the line is highlighted in yellow. From here the user may tender the credit transaction through an "Offline Credit" mode.

Reprint a Credit Slip

In order to reprint a copy of a credit slip, a manager will need to log into **Enterprise Manager – Halo Reports** to locate the check, and then select the print option to reprint the credit slip.

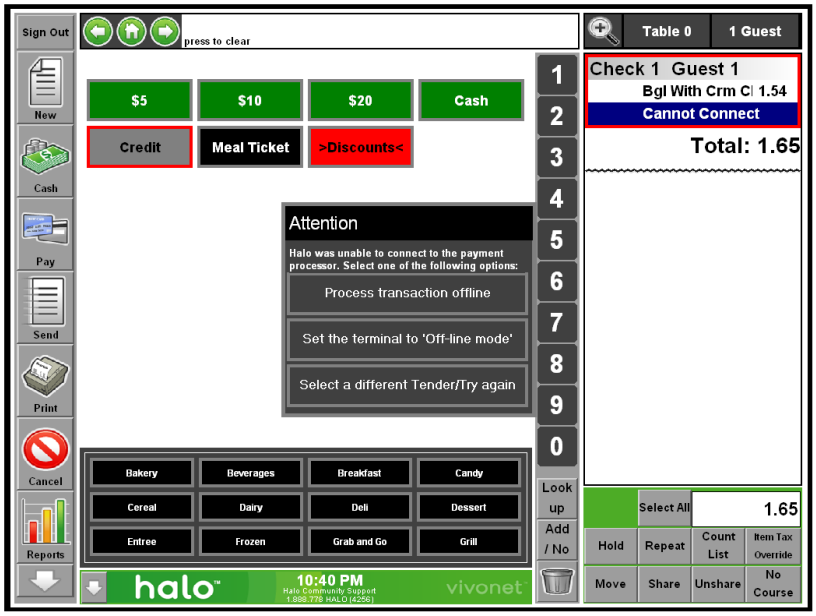
Offline Credit

If your Halo system is unable to communicate with the Credit Card processor, an authorized employee can accept a credit card payment as an offline transaction.

The Offline Credit function enables you to settle a credit tender and therefore close a check on the POS. The actual credit transaction through the credit processor will queue up for automatic processing when the communication is re-established.

When your Halo system detects it is unable to connect to Credit Card processor, you will be prompted to choose one of the following options:

1. **Process Transaction Offline:** allows you to do an offline transaction just for the current check.
2. **Set the terminal to offline mode:** allows you to turn on offline mode for all going forward transactions.
3. **Select a different Tender/Try again:** allow you to complete transaction with another tender.



Voice Auth Code

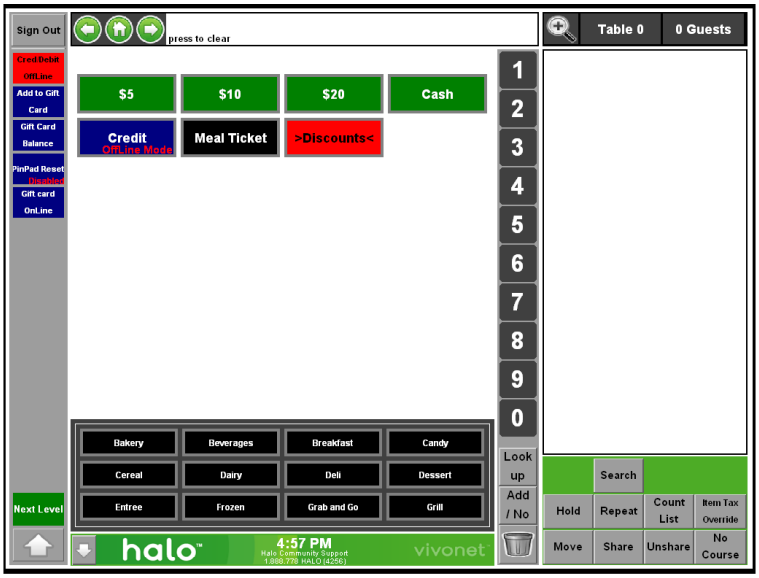
Enter voice authorized code from the appropriate credit card authorizing bank. **If it did not call for a voice authorization and/or you do not have this number, hit "ENTER" to continue to process the transaction offline.**



Set the terminal to Credit offline mode (Manually)

1. Go to Fourth-Level Command Bar Functions.

2. Hit the "Cred/Debit Online" key. (**To turn this mode off, hit the same key again**)

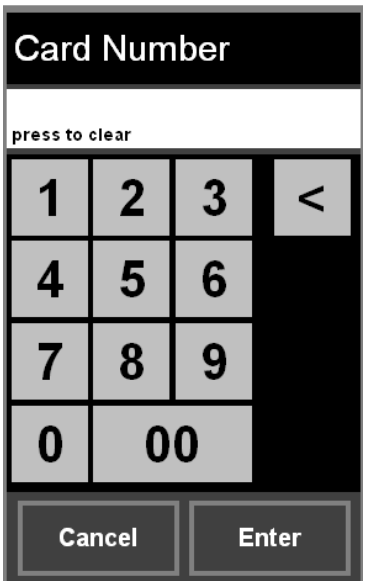


Post a Stored Value Card Payment

1. Select **Stored Value Card** tender key (Blackboard, Cbord, Cardsmith, Heartland, and/or SoGo)

2. Select Enter to accept this amount, or type an amount (e.g., a partial payment) **and select Enter**. A pop-up window displays for the card number.





3. Swipe the card through the reader. Users are also able to manually type in the card number by using the pin pad, if the card does not read when swiping.

Add to Stored Value Card

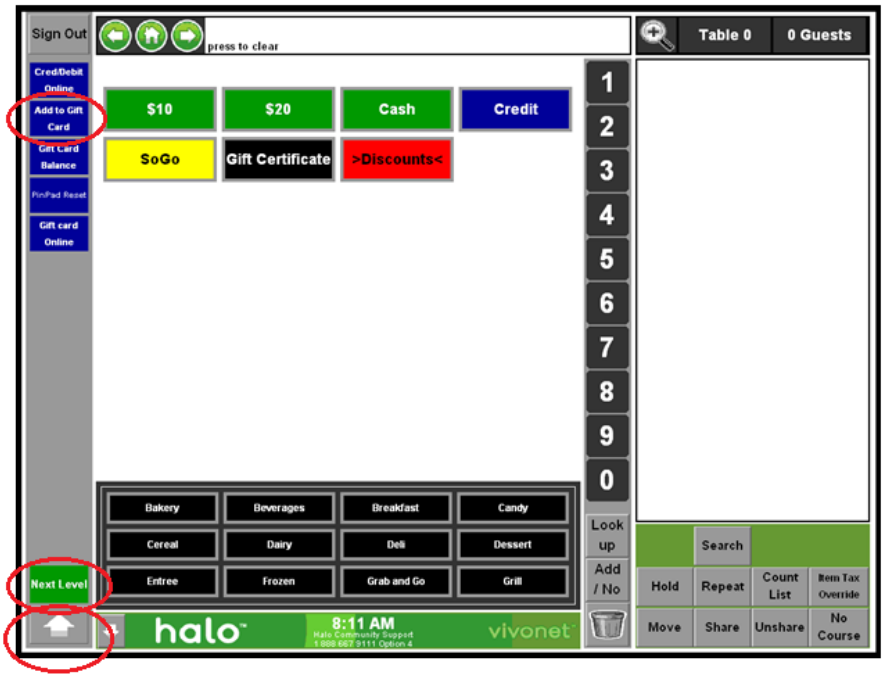
1. Click on the grey arrow on the bottom left, to access the blue manager keys: 

2. Go to the **fourth-level functions** and select "**Add to Gift Card**".

3. **Swipe the card** (or manually type the number on the pin pad)

4. **Enter the Amount** that you wish to add to the Stored Value Card.

5. Select tender to pay for the credit added on the card.



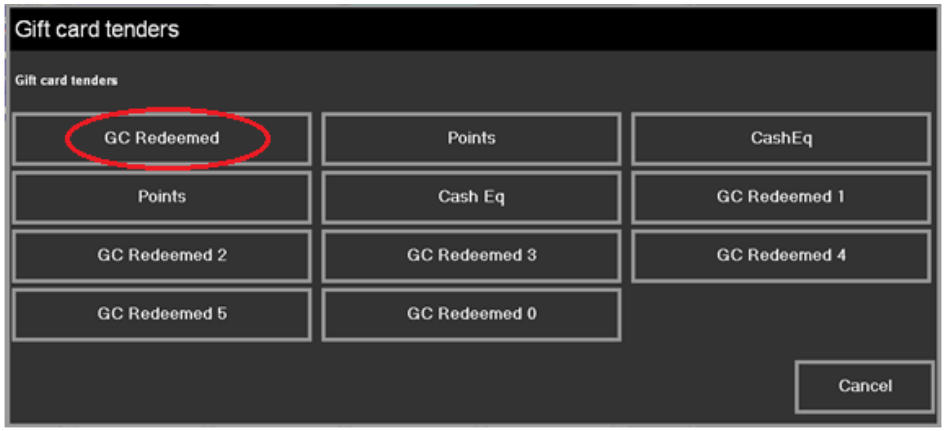
Check Stored Value Card Balance

1. Click on the grey arrow on the bottom left, to access the next level of command bar functions:



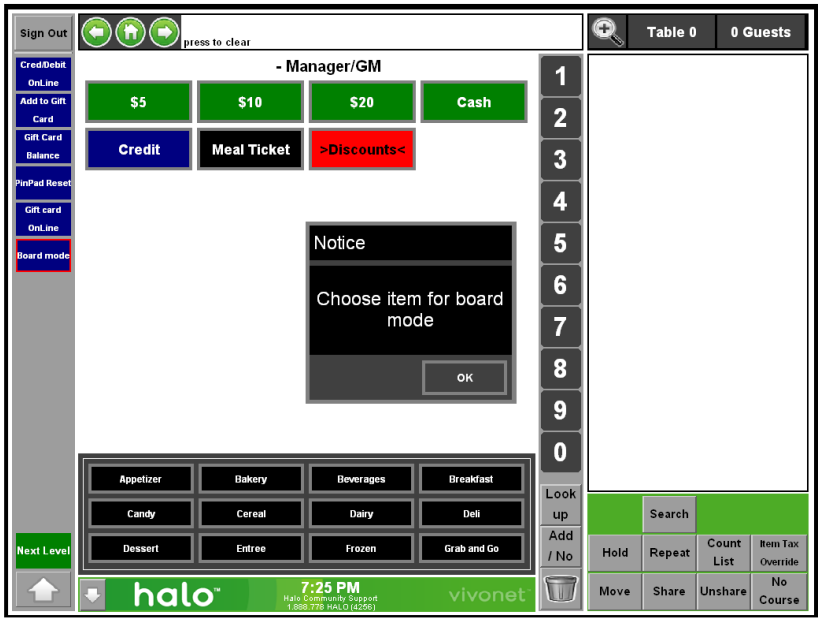
2. Go to the **Fourth-Level Command Bar Functions** and select **"Gift Card Balance**" and select the specific account.

3. **Swipe the card** (or manually type the number on the pin pad).

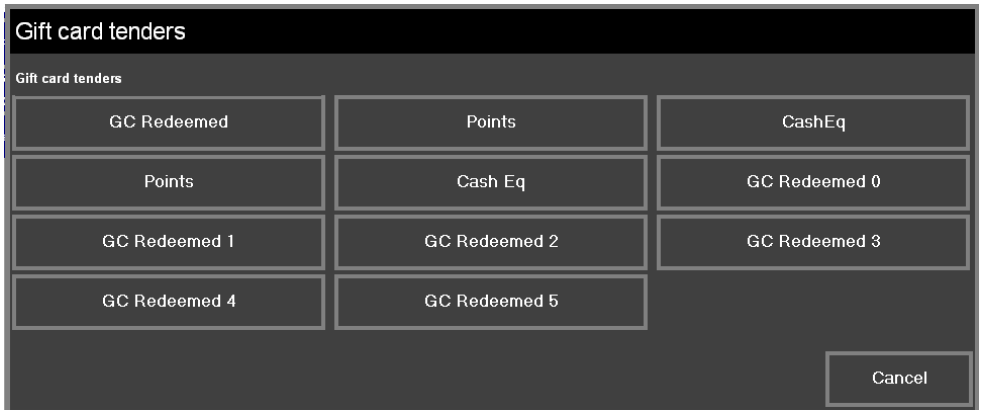


Board Mode

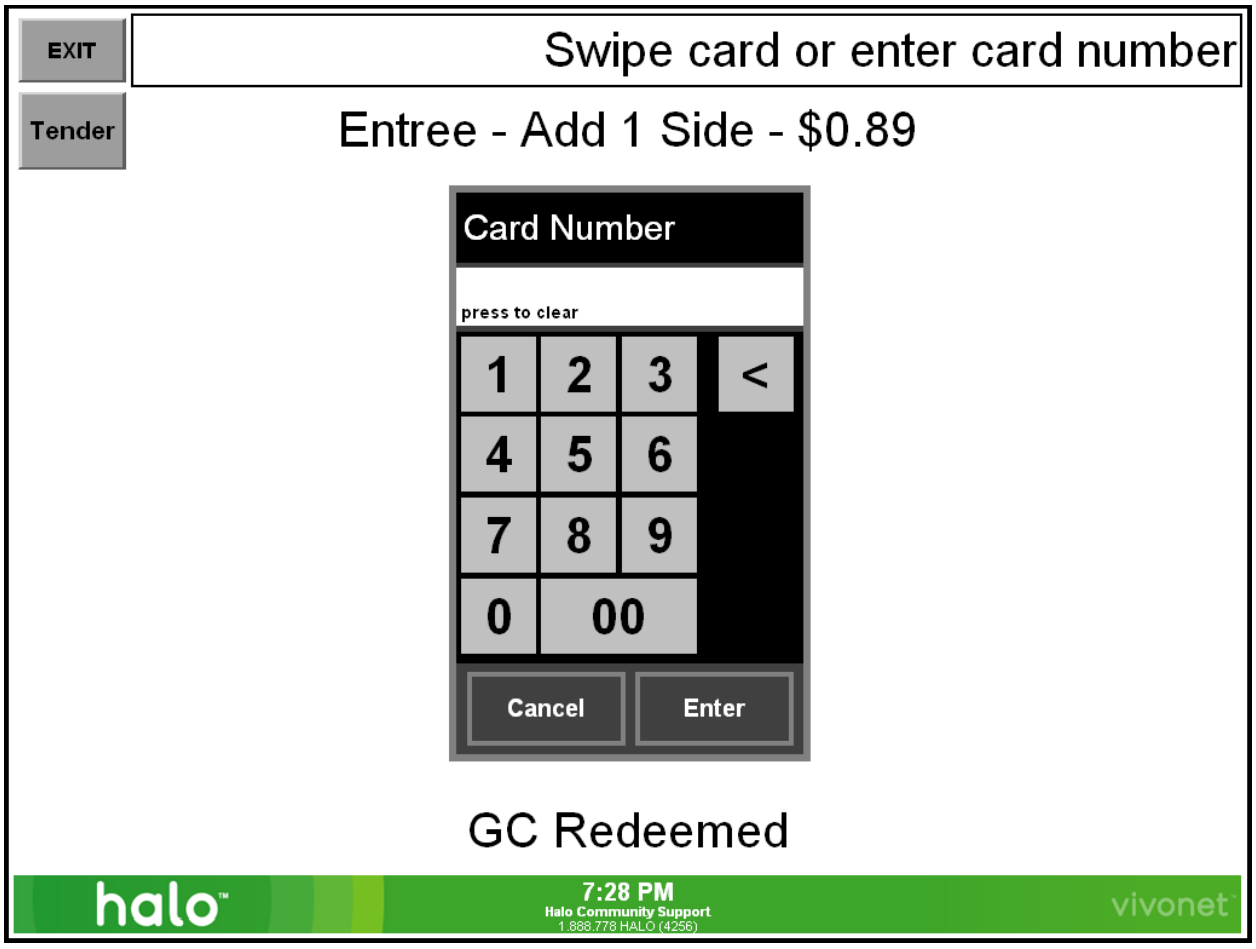
1. Select **Board Mode** from the Fourth-Level Command Bar Functions and then choose item for Board Mode.



2. Select **Stored Value Card Account**.



3. Swipe Card or enter card number.



Offline Stored Value Card

If the stored value card processor is out of communication (down), an authorized employee can accept a stored value card payment as an offline transaction.

The "**Offline Gift Card**" function enables you to settle a stored value card tender and therefore close a check on the POS. The actual transaction through the stored value card processor will queue up for automatic processing when the communication is re-established.

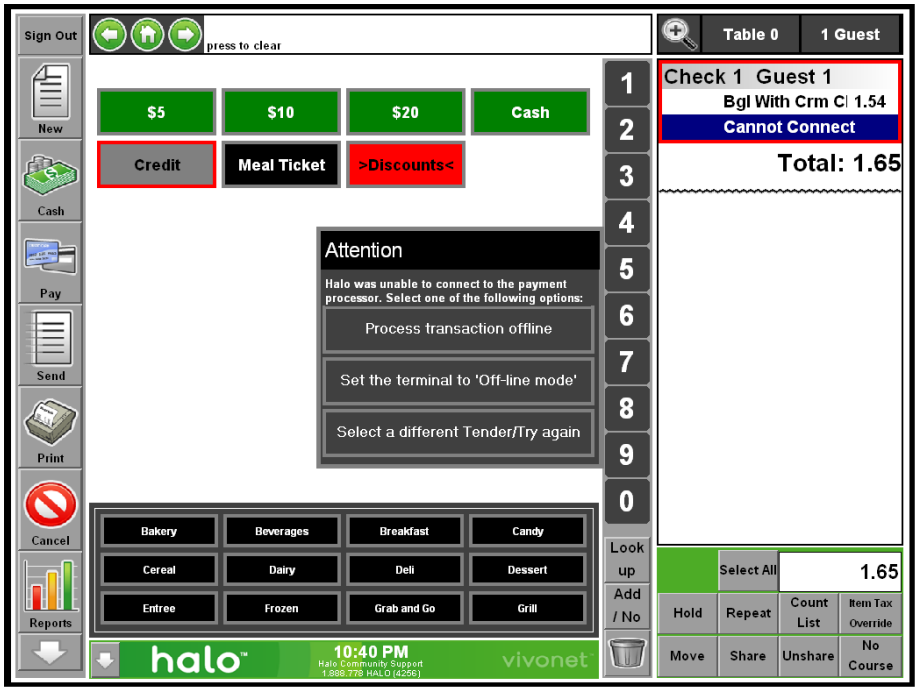
To tender an Offline Store value card Transaction, the process is as follows:

Options:

1. **Process Transaction Offline:** allows you to do an offline transaction just for the current check.

2. **Set the terminal to offline mode:** allows you to turn on offline mode for all current transactions. (**Can be re-enabled in Fourth-Level Command Bar Functions**)

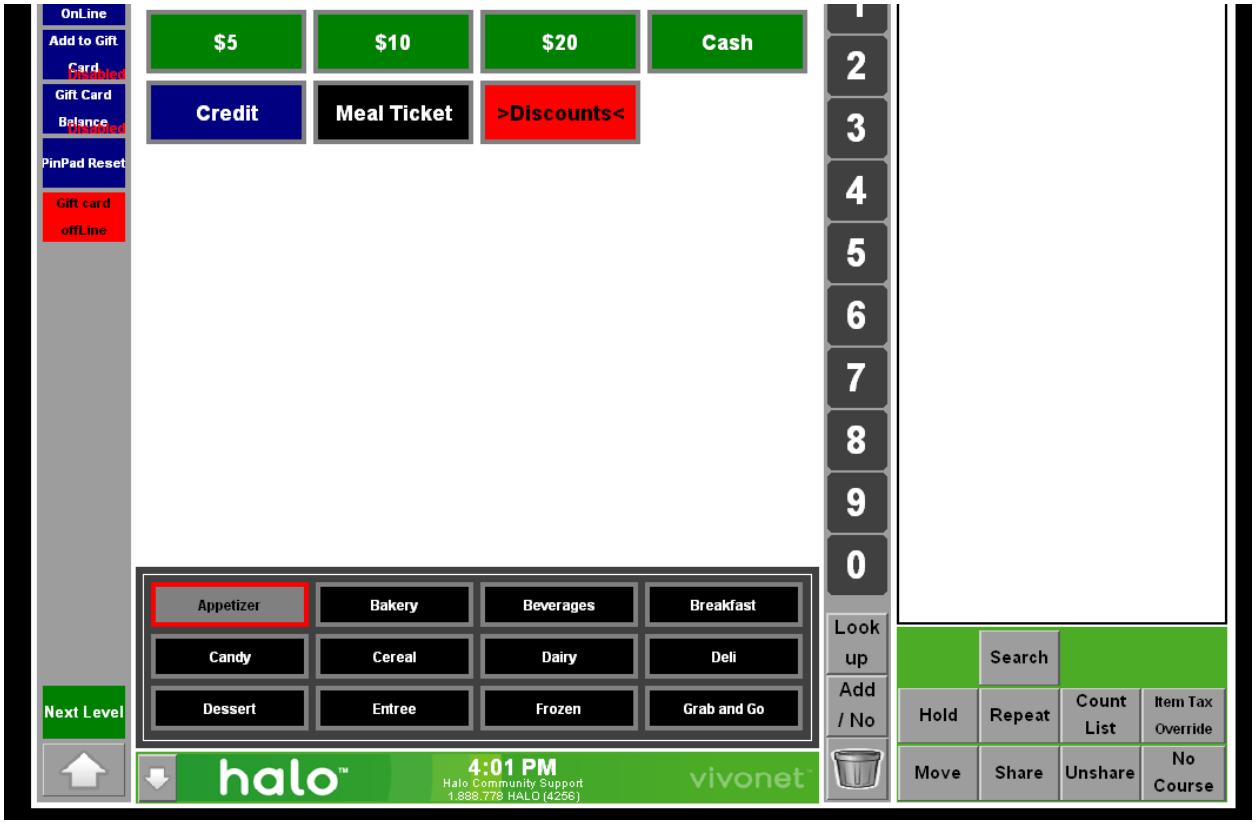
3. **Select a different Tender/Try again:** allow you to complete transaction with another tender.



Set the terminal to Gift Card offline mode (Manually)

1. Go to Fourth-Level Command Bar Functions.

2. Hit the "**Gift Card Online**" key. (**To turn this mode off, hit the same key again**)



No Sale

This function allows a privileged user to open the cash drawer without a sale being performed.

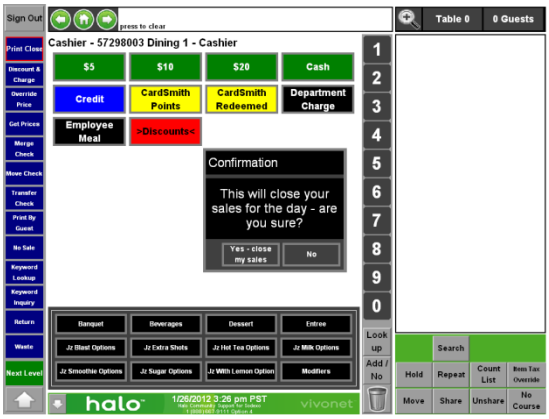
1. Select **No Sale** from the Second-Level Command Bar Functions. 

2. From the Select a Cash Drawer window, select Open Cash Drawer to open the drawer from the selections shown.

Print Close (Server Cashout Report)

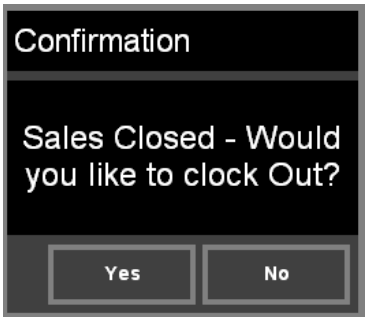
1. Select Print Close from the Second-level Command Bar Functions.

2. Confirmation will appear – "*This will close your sales for the day – are you sure?*"

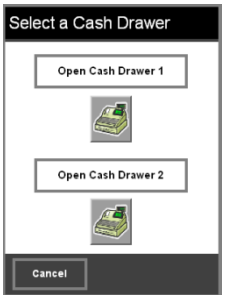


3. Confirmation will appear – "*Sales Closed – Would you like to clock out?*"

Note: If there are any Open Checks still pending for this user, a Manager will need to sign-in and complete an over-ring for all open checks before this user can Cash Out.



4. Select a Cash Drawer – Open Cash Drawer 1 or Open Cash Drawer 2. An **Employee Cashout Report** will print.



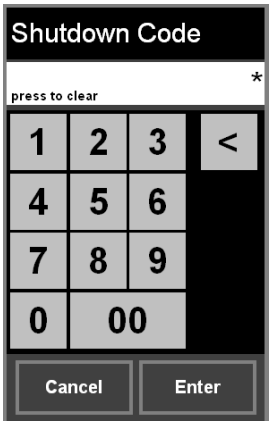
Note: Depending on the permission settings, a privileged user may need to authorize the **Print Close**.

Shut Down the POS

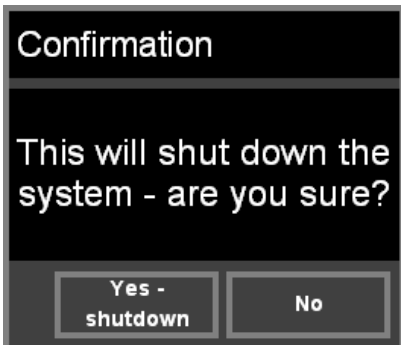
1. From the sign-in window, select Cancel



2. Enter the number 1 and then select Enter



3. Select "**Yes – Shutdown**"



4. Select "Desktop"



5. Select Start and then Shutdown.

