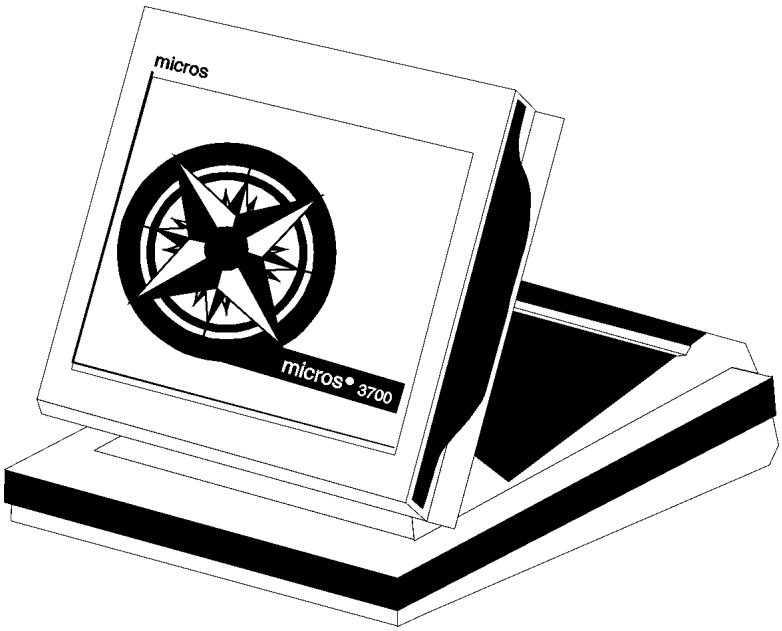
micros® Systems, Inc.

POS Configurator User's Guide

3700 POS

Restaurant Enterprise Series



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Preface

Refer to the preface if you have any questions about the organization, conventions, or contents of this manual.

In this chapter

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Welcome to the POS Configurator User's Guide

The purpose of this manual is to provide MICROS installers and customers with an overview of the POS Configurator module.

How This Manual is Organized

Chapter 1: Understanding the 3700 System Database
This chapter contains an introduction to the structure and contents of a 3700 database.

Chapter 2: Creating a New Database
This chapter describes the methods for creating a new database.

Chapter 3: Using POS Configurator
This chapter introduces the POS Configurator interface and describes the steps to performing basic operations.

Chapter 4: Devices
This chapter describes the forms in the Devices folder which are used to configure hardware devices. It includes a description of the forms for programming user workstations, printers, and touchscreens.

Chapter 5: System
This chapter describes the forms in the System folder, which are used to enter basic information about a restaurant. It includes forms for programming the name, local currency, table arrangement, and time periods.

Chapter 6: Sales
This chapter describes the forms in the Sales folder. It includes forms for programming menu items, and condiments, as well as the discounts, and taxes that apply to sales.

Chapter 7: Revenue Centers
This chapter describes the forms in the Revenue Centers folder. These forms contain options for customizing restaurant operations in each revenue center.

Chapter 8: Employees
This chapter describes the forms in the Employees folder. It includes forms for programming personnel, timekeeping, and schedules.

Chapter 9: Reporting
This chapter describes the forms in the Reporting folder. It includes forms for programming totals, tracking groups, and autosequences.

Appendix A: For 2700 Users
This chapter describes the changes 2700 users will see in the 3700 POS Configurator.

Who Should Use This manual?

This manual is intended for use by:

- MICROS Installers/Programmers/Dealers
- MICROS Customer Service
- MICROS Training Personnel
- MIS Personnel

This manual assumes that you have the following knowledge or expertise:

- Working knowledge of the Windows interface.
- Operational understanding of PCs.
- Understanding of basic network concepts.
- Basic knowledge of relational database concepts.
- Understanding of POS terminology and concepts.
- Exposure to a MICROS POS system (2400, 2700, 4700, 8700) or other POS; preferably experience programming 2700 System.
- Familiarity with MICROS peripheral devices.

Related Manuals

This section provides a list of the related MICROS documentation as well as a list of suggested reading materials.

MICROS Documentation

The 3700 Restaurant Enterprise System library includes:

- ❑ *3700 Administration Applications Manual* 100134-503
- ❑ *3700 Custom Reports Design Manual* 100134-508
- ❑ *3700 Feature Quick Reference Manual* 100134-506
- ❑ *3700 Feature Reference Manual* 100134-501
- ❑ *3700 Hardware Installation Guide* 100134-514
- ❑ *3700 Hardware User's Maintenance Guide* 100134-512
- ❑ *PC Workstation Model 32 Setup Guide* 100016-085
- ❑ *3700 Reports Manual* 100134-511
- ❑ *3700 Site Preparation Guide* 100134-513
- ❑ *3700 Site Survey Manual* 100134-505
- ❑ *3700 SQL / Database Access Manual* 100134-507
- ❑ *3700 POS Configurator User's Guide* 100134-504
- ❑ *3700 System Interface Module User's Guide* 100134-516
- ❑ *3700 System Platform Installation Manual* 100134-515
- ❑ *3700 User's Manual* 100134-502

Suggested Reading

- ❑ Crystal Reports documentation
- ❑ Microsoft Windows 95 Resource Kit
- ❑ Microsoft Windows NT Server 3.51 documentation
- ❑ Microsoft Windows NT 3.51 Resource Kit
- ❑ Microsoft SQL Server 6.0 documentation
- ❑ Sybase SQL documentation

Conventions and Symbols

This section describes the conventions and symbols used in this manual.

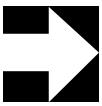
Conventions

The following conventions are used throughout this manual.

Convention	Meaning
[Key]	Keys on a PC or PC Workstation. Example: [Enter]
‘Message’	Messages that may appear during the programming process. Example: ‘Select Menu Item Range’
|	Indicates the sequence of menu items to be selected. Example: File | Sales | Condiments
Italics	Indicates the proper name of a POS Configurator option

Symbols

The following symbols are used throughout this manual.



Note

This symbol is used to bring special attention to a related feature.

Tip

This symbol is used to point out suggestions that can save you time and difficulty.

What's New?

What's new in v1.01

No new forms were added for this version.

What's new in v1.02

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Reader Response

As you read this, the documentation staff at MICROS is hard at work preparing the next edition of this manual. Your feedback could be instrumental in changing that next edition.

Tell us what you think— we'd like to hear from you!

We are very interested in hearing from you about:

- Good ideas -

  Tell us about some part of this manual that you think works well– we'll be sure to maintain it.

- Ideas that need work -

  Tell us about an area that needs to be improved– we'll punch it up.

- Information not included -

  Did we miss something? Let us know so we can add it.

- Information that's not clear -

  Did you find something hard to follow? We'll rethink it and rewrite it.

- Information that's not correct -

  Did something get past our arduous tech edit process? Help us fix it.

How to reach us

Postal Address

If you can offer any criticisms or suggestions about this manual, please mail a note or postcard to:

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12000 Baltimore Blvd.
Beltsville, MD 20705 USA

Attn: Documentation Group Manager,
Table Service Restaurants Group

E-mail Address

As an alternative, you may address criticisms and suggestions regarding this manual by electronic mail to:

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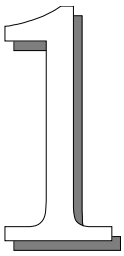
Please use the name of the manual as the subject line.

Chapter



The 3700 System Database

This chapter contains an introduction to the structure and contents of a 3700 database. It includes information about the characteristics of the 3700 database, the relationships between tables and the classification of database tables.

In this chapter

Overview 1-2
Introducing the Database 1-3
Types of Database Tables 1-5
How Forms are Related to Tables 1-10

Overview

The 3700 system uses client/server architecture to manage the unique information about each restaurant's POS environment. Details about the restaurant's operation reside in tables on a database server, an application that manages the database. The database server in turn resides on the server PC. In a MICROS 3700 system, POS Configurator is the gateway to the tables managed by the database server and makes programming a 3700 system easier.

Introducing the Database

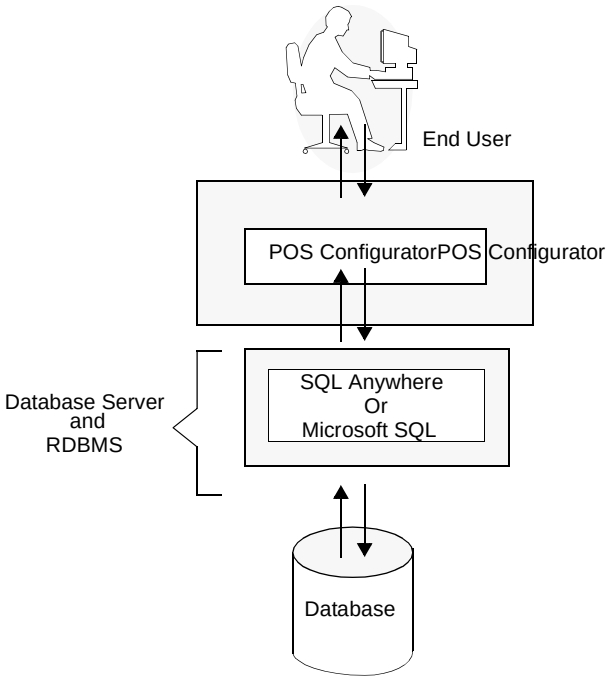
Characteristics of the 3700 system include:

- It is a relational database in which tables store all information.
- The Relational Database Management System (RDBMS) manages the database and functions as the database server.
- POS Configurator is the software layer between you and RDBMS. It's your interface to the database.

A Database System

In a 3700 system, RDBMS acts as a multi-user database server. This means that many workstations (clients) can access the information stored in the database.

RDBMS is the software between the physical database and you. We've made accessing the database even simpler by adding an additional software layer between you and RDBMS. That layer is 3700 POS Configurator POS Configurator.



An SQL Database

Database information is accessed through SQL—pronounced "sequel". SQL is a software language that uses English-like commands to manipulate information in tables. Here is an example of an SQL command:

select * from micros.mi_def

POS Configurator makes it easy for you to access and modify the tables necessary for programming a database. You don't need to know SQL to use POS Configurator.

You do not need to program every table in the database to configure a 3700 system. POS Configurator gives you access only to those tables and fields necessary for configuring POS operations and installed hardware.

Database Tables

A database consists of many tables. Each table in a relational database holds a specific set of information about a restaurant. When the system performs a transaction, it accesses the database tables to obtain the information. For instance, menu item names reside in the Menu Item Definition table, while menu item prices reside in the Menu Item Price Definition table. In the 3700 system, one menu item definition (name) can be associated with several different prices (Bar, Restaurant, and Happy Hour). This makes the system flexible.

Types of Database Tables

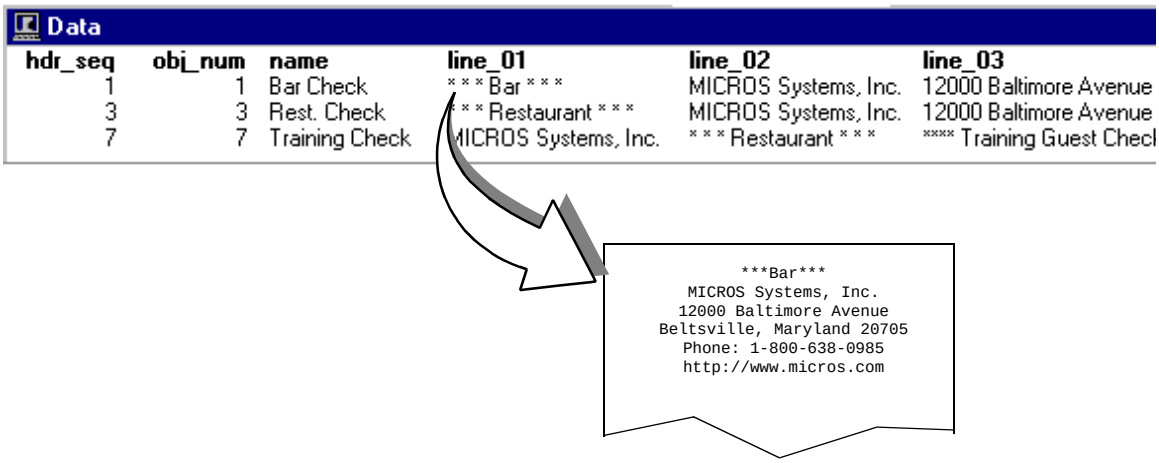
The tables in the database fall into several basic categories: definition, class definition, totals, detail, and status.

Types of Database Tables	Accessible from Configurator	Edited Manually	Updated by System
Definition	X	X	
Class Definition	X	X	
Total			X
Detail			X
Status			X

Not all of these types of tables can be accessed and edited through POS Configurator. Both definition and class definition tables can be accessed and modified. However, total, detail, and status tables are not accessible through POS Configurator. The system updates total, detail, and status type tables behind the scenes.

Definition Tables

A definition table defines the characteristics of an item in the database, such as a menu item, employee, or guest check. The example below shows part of the Header Definition table (hdr_def). You can see how each line in the header is stored as a column in the database table.



Some of the other definition tables in the 3700 database include:

- Employee
- Order Type
- Menu Item
- Touchscreen Style
- Reason
- Help Screen
- Menu Item Group
- Tax
- Table
- Revenue Center
- Tender Media
- Tax Class
- Order Device
- Color Combo

Class Definition Tables

This specialized type of definition table plays an important role in a 3700 database. Class definition tables impact:

- menu items
- condiments
- fixed price meal courses
- historical totals
- printers
- menu levels
- employees

Each class defines a set of identical characteristics. The class can then be shared by many different items that use these characteristics.

Advantages of Class Definition Tables

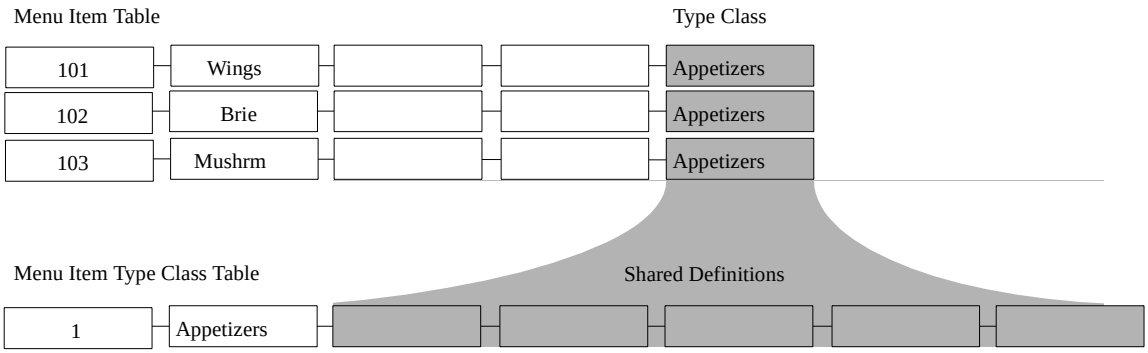
The advantages of class definition tables in the database include:

- Simplifying database programming and maintenance
- Reducing the total disk space required to store a complete set of definitions

Simplifying the Programming Process

Classes simplify database programming and maintenance. For example, assume that you define a menu item class called “Appetizers”.

When you create a menu item that is an appetizer, you can assign it to the menu item class, “Appetizers”. This menu item then shares the same set of characteristics as other appetizers in the database. If you edit the characteristics in “Appetizers”, then you automatically change the characteristics for all menu items assigned to this class. Making changes to 12 menu items becomes a one-step process.



Reducing Disk Space

Since you are not storing class definition information with every menu item, you have less information to store on the server. For example, 12 menu items each increment the seat number when ordered. *Increment seat number* is an option selected for the menu item class. As a result, each menu item record does not require this option selection.

Class definition tables in the 3700 database include:

- ❏ Condiment Selection
- ❏ Course Selection
- ❏ Print Definition
- ❏ Menu Item Type
- ❏ Menu Level
- ❏ Employee
- ❏ Historical Total

Totals Tables

Totals tables contain accumulated totals information that reflect transaction activity, such as menu item sales and time period sales. The system provides different types of totals, including:

- ❑ Employee
- ❑ Order Type
- ❑ Menu Item
- ❑ Cashier
- ❑ Family Group
- ❑ Major Group
- ❑ Menu Item Group
- ❑ Tax
- ❑ Serving Period
- ❑ Time Period
- ❑ Revenue Center
- ❑ System

Unlike definition tables, totals tables are not accessible through POS Configurator. The system updates these tables automatically based on transaction activity. To see the transaction activity associated with these totals tables, you must generate reports.

Configuring Totals

In the Reporting folder you'll program definition tables to manage the totals information. The system can be programmed to:

- ❑ Create daily totals
  You may choose which totals to store on a daily basis.
- ❑ Store daily transactions for a specified number of days
  For example, you may want to keep historical totals, going back as far as a year or two.
- ❑ Purge totals
  This procedure is a basic housekeeping chore, designed to help you manage the amount of information that you keep. From an administrative perspective, this procedure also conserves disk space.

Detail Tables

Detail tables hold supporting information about transactions and activities. For example, the Time Card detail table stores an employees clock in date and time, clock out date and time and total number of hours. Some other detail tables in the 3700 system include:

- ❑ Credit Card Batch
- ❑ Transaction
- ❑ Sales
- ❑ Check
- ❑ Menu Item
- ❑ Tender Media
- ❑ Credit Authorization Request
- ❑ Discount/Service
- ❑ Tips Declared
- ❑ Cancel
- ❑ No Sale

Status Tables

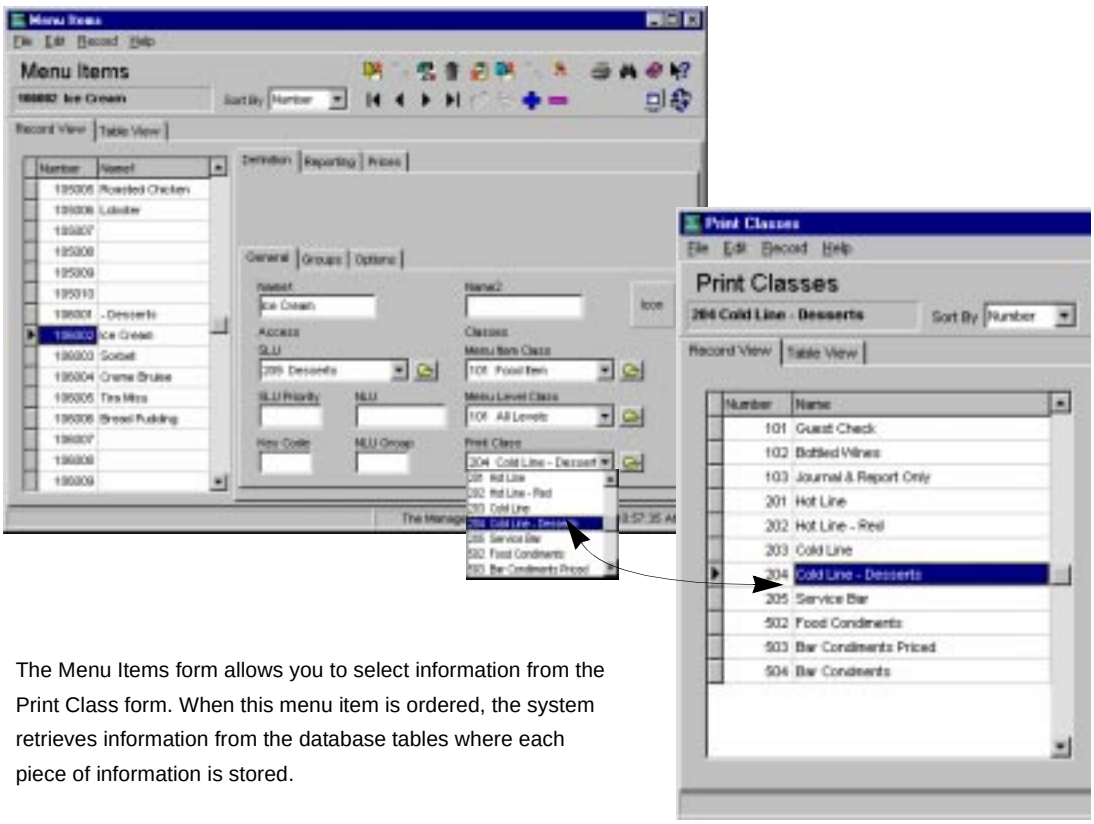
The system updates status tables to respond to system activity. For example, the system status table contains the business date, and the date and time of the last system update. The employee status table includes information about an employee's current activity. For example, it includes the job number this employee is clocked in under.

How Forms are Related to Tables

The forms in POS Configurator allow you to enter information into the database tables. The information you enter in a form is not always stored in just one table in the database. For example, when you program the Menu Items form you enter the name and price of each menu item. These are stored in the Menu Item Definition table and the Menu Item Price Definition table. POS Configurator simplifies the programming process by eliminating the need to access multiple tables.

Linking Forms

Many of the forms in POS Configurator contain fields that are links to other forms. For example, when programming a menu item, you must link it to a Print Class. You can add to or modify the Print Classes form if you click the folder icon beside the field.

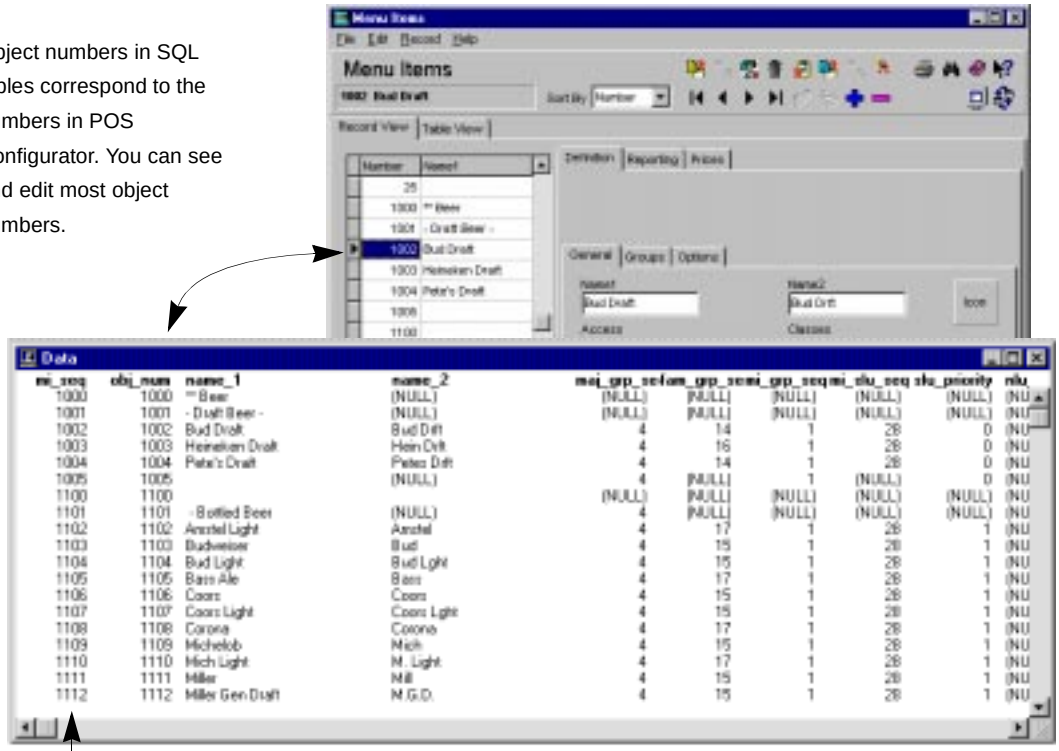


The Menu Items form allows you to select information from the Print Class form. When this menu item is ordered, the system retrieves information from the database tables where each piece of information is stored.

Sequence and Object Numbers

Each record in a 3700 database table is identified by a unique sequence number. Sequence numbers refer to individual records in the table and therefore may never change. You cannot view sequence numbers in most POS Configurator forms, because they are set in the database. Object numbers, on the other hand, are part of every form in POS Configurator.

Object numbers in SQL tables correspond to the numbers in POS Configurator. You can see and edit most object numbers.



Sequence numbers usually do not appear in POS Configurator. They are part of the SQL table.

Note

You cannot directly change an object number to one that already exists for another record. Each object number in the database must be unique. To change object numbers, assign a new (unique) object number to the items you want to change. Then you may reassign the numbers.

Scope

The scope of the 3700 system allows you to consolidate and share data:

- for a revenue center
- for the entire system

For instance, you can create sales and labor reports for each revenue center. And of course you can create these same reports on a system-wide basis.

Chapter

Creating a Database

This chapter describes the procedure for creating a database.

In this chapter

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Database Sources 2-3
Programming Methods 2-5
Suggested Programming Order 2-7
POS Configurator Folders and Forms 2-9
Wrapping Up 2-10

Overview

Programming a new database requires you to do some planning. Use the 3700 Site Survey to gather information about the restaurant and its operation before you attempt to program a database.

Read this chapter for information about the following programming topics:

- ❑ Pre-programming steps
- ❑ Programming methods
- ❑ Introduction to the programming process
- ❑ What to do after you complete programming

Database Sources

There are several ways you can create a new database:

- ❑ Adapt the 3700 sample database
- ❑ Adapt a 3700 database from a similar site
- ❑ Convert a 2700 database
- ❑ Program a shell (blank) database

Whether you choose to start fresh or with an existing database, you must plan ahead to ensure successful implementation.

Using the Site Survey

The site survey should be completed by the programmer/ installer early in the installation process, so that you can use it when developing the database.

Completing the Site Survey

The *3700 Site Survey* contains questionnaires and charts for compiling information about the restaurant. The programmer/ installer conducts interviews with restaurant management acquire the information.

If you have not yet completed the site survey, do so before developing the database. The site survey will ensure greater success during and after the installation.

Adapting or Converting an Existing Database

Starting with an existing database, one that has common features enabled, is faster and easier than programming a blank database.

Options for starting with an existing database include:

- ❑ Adapting the sample 3700 database
- ❑ Adapting an existing, similar database.
- ❑ Converting a 2700 database

Adapting the Sample Database

MICROS provides a sample 3700 database with every system. The sample database contains records you can modify, and has a typical set of features already enabled.

Adapting a Similar Database

Chain restaurants usually use identical operating procedures and menus. When installing a system in a new unit, you may wish to copy the database an existing site and modify it to meet the new restaurant's specific needs.

Converting a 2700 Database

You can convert a 2700 database for use in the 3700 system. Although this is certainly preferable to typing a 2700 database into the 3700 POS Configurator, you'll still need to make changes to areas of the database that are different in the 2700.

For example, keyboards are not used in the 3700 database. As a result, you must create touchscreens to replace 2700 keyboards, and redesign any areas in the database where keyboards are used, such as menu items and employees.

For information on 2700/3700 conversion utilities, contact your MICROS representative.

Programming a Shell Database

If you choose to start with a blank database, you must program the forms in the order shown in "Suggested Programming Order" on page 2-7. Before you begin, read the warning section titled "Don't Lock Yourself Out" on page 2-7

Blank Forms

When you start with a blank database, most forms do not contain any records. An exception to this are forms that have a preset number of records available or forms that contain required information. For example, the Report Templates form contains a record for each report template that comes with the system. You cannot delete these records, but you can insert additional records if needed. If a form does not contain records, you must add them. See "Adding Records" on page 3-18 for more information.

Programming Methods

There are two ways to approach database programming:

- ❑ Programming by feature
- ❑ Programming by form

The most efficient way to program a new database or make major changes to an existing database is to do so by form. If you need to modify or enable a particular feature, then you should do your programming by feature.

Using the Feature Reference Manual

The *Feature Reference Manual* is the primary reference to the 3700 system. The *Feature Reference* is an encyclopedia of system features, from hardware to POS transactions.

Each feature has the following sections:

- ❑ Description
- ❑ Usage
- ❑ Examples
- ❑ Reports
- ❑ Enabling
- ❑ Related Topics

The Enabling section provides a summary of the options and fields that make the feature work.

Programming by Feature

Some features may require programming a combination of components in several different forms. For example, to enable the suspend/resume feature, you must program fields or options in the RVC Transactions, Employee Classes, and Tender/Media forms.

Some features of the 3700 system require you to define a single option. In the case of double-wide printing, for example, selecting a single option enables the feature.

Introducing POS Configurator and POS Configurator's online help module do not provide instructions for programming specific features. When programming by feature, refer to the *3700 Feature Reference Manual*.

Programming by Form

Systematically completing information in the forms is the fastest way to program a database. To minimize re-opening forms and save time, use the "Suggested Programming Order" on page 2-7.

Programming Order

This order is designed so that you program a database in much the same way that you would build a house: before you put up the walls, you need a foundation.

Start with the first form and work your way down the list. Depending on the restaurant's needs, you may not need to program every form. Optional forms are listed last and may be programmed at any time.

Suggested Programming Order

Don't Lock Yourself Out

When entering POS Configurator for the first time in a blank database, the system grants you access based on the fact that the database is empty.

However, once records of any kind are entered in the database, the system enables Configurator Access security. This means that the system will allow only an authorized employee to continue editing POS Configurator.

When programming a blank database, you must first create a record for an authorized employee— you!

1. Open the Employee Class form and create a class.
2. Open the Configurator Access form, and select the employee class you just created. Grant read, insert, update, and delete privileges for All Forms to this employee class.
3. Open the Employee form and create an employee record. Link this employee to the class you just created, and assign the employee an ID. Remember this ID!
4. Save and exit these forms.

WARNING

If these steps are not followed, POS Configurator will lock you out. To recover, you must use SQL to examine and edit the emp_def, emp_class_def, and emp_class_cfg_access_def tables in the database.

Form	Use this link	To	Return to
Before doing anything else, create a record for an employee who is authorized to program in POS Configurator.			
Network Node			
Devices			
Interface			
Order Device	Descriptors	Program Headers for remote orders	
Tax Rates			
Tax Classes			
User Workstation	Revenue Centers Order Types	Program Revenue Center Names Program Order Types	Default Sign In Touchscreen
CA/EDC			
Restaurant			
Information Screens			
Reason Codes			

Form	Use this link	To	Return to
Periods			
Time Periods			
Serving Periods			
Print Classes			
Menu Levels			
Discounts/Service Charges	Descriptors	Program Discount/Service SLUs	Touchscreen Style
Tender/Media	Descriptors	Program Tender/Media SLUs	Touchscreen Style
RVC Credit Cards			
RVC Discount/Service			
RVC Display Design			
RVC Interfaces			
RVC Posting			
RVC Printing			
RVC Print Design			
RVC Seats			
RVC Taxes			
RVC Transactions			
Employee Classes			Default Touchscreen
Configurator Access			
Jobs			
Employees	Cashier Totals	Program cashier totals names	
Courses			
Menu Item Classes	Descriptors	Program Sales Itemizers	
Condiments			
Menu Items	Descriptors Report Groups	Program Menu Item SLUs Program Report Groups	Touchscreen Style
Touchscreens			
Touchscreen Designer			
RVC Touchscreens			
Tracking Groups			
Historical Totals			
		Optional Programming	
Macros			
Currency			
Time and Attendance			
Time Clock Schedule			
External Programs			
Autosequences	Report Schedule	Program Report Schedule Classes	
Autosequence Steps	Report Date Range	Program Date Ranges	

POS Configurator Folders and Forms

Sales			
Menu Items	Courses	Discount/Service	Print Classes
Menu Item classes	Descriptors	Tender/Media	Tax Rates
Condiments	Menu Levels	Currency	Tax Classes
Employees			
Employees	Jobs		
Employee Classes	Time and Attendance		
Configurator Access	Time Clock Schedule		
Devices			
Network Node	Order Devices	Touchscreens	
Devices	Interfaces	Touchscreen Designer	
User Workstations	CA/EDC Drivers		
Revenue Center			
RVC Credit Cards	RVC Posting	RVC Interfaces	RVC Taxes
RVC Discount/SVC	RVC Printing	RVC Seats	RVC Touchscreens
RVC Display Design	RVC Print Design	RVC Table Seating	RVC Transactions
System			
Restaurant	Information Screens	Periods	External Programs
Reasons	Serving Periods	Licensing	Order Types
Macros	Time Periods		
Reporting			
Report Templates	Schedule Classes	Report Groups	Autosequences
Report Classes	Cashier Totals	Tracking Groups	Autosequence Steps
Report Date Range	Historical Totals		

Wrapping Up

After you finish programming, wrap up with the following checklist:

- ❑ Back up the database
- ❑ Review site survey
- ❑ Test the database
- ❑ Clear totals

Perform these tasks before using the database in a live environment.

Back Up the Database

Once you have a working database in place, you will probably continue to make changes. When you make a change to the database, don't forget to make a backup.

Use Windows Explorer to create a backup copy of your database file.

Review the Site Survey

Review the site survey. The features enabled in the database should correspond to the requirements indicated by the site survey.

Review the menu items with the menu provided by the restaurant. Check the employee information in the database with that provided in the site survey.

Test the Database

Testing the database helps you ensure that the database meets operational requirements. Test every key and every feature to make sure they work correctly.

For example, are pop-up menu items available on the correct levels? Are employee privileges set correctly? Can you access every menu item on the correct touchscreens, menu levels, and at the correct prices?

Printing

Use your test to verify that all menu items, discounts, service charges, and tender/media are printing on the appropriate remote, journal, guest check, validation, and local order printers.

Reports

Run all autosequences to verify that reports are set up correctly, including tracking groups. Also, check that the reports print to the proper output device.

Clear Totals

After testing the database, clear any totals that you may have accumulated. For example, if you were testing printing and labor features, close all guest checks, clock out any employees, and clear all totals.

Chapter 3

Using POS Configurator

This chapter introduces the POS Configurator interface and describes the steps to performing basic operations.

In this chapter

Overview 3-2
The Control Panel 3-3
Opening POS Configurator 3-5
The Main Window 3-7
The Toolbar 3-11
Quick Reference to POS Configurator Tools 3-12
Working with Forms 3-14
Adding Records 3-18
Copying and Pasting Single Records 3-19
Block Copying and Pasting Records 3-20
Finding a Record 3-21
Editing a Record 3-22
Deleting Single Records 3-23
Block Deleting Records 3-24
Saving Changes 3-25
Printing Employee and Menu Item Definitions 3-26
Using Touchscreen Designer 3-28

Overview

The 3700 POS Configurator interface is easy to learn and use. Refer to the topics on the following pages to understand the tools and functionality of POS Configurator.

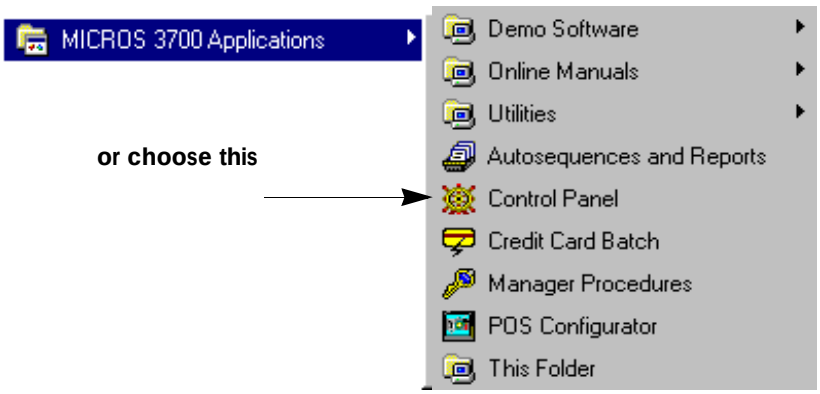
The Control Panel

Before you can open and use POS Configurator, you must start the SQL Database Server through the Control Panel. (Note: if you are already running POS Operations then the database server *is* running. Go straight to "Opening POS Configurator" on page 3-5.)

Starting the Control Panel

Open the MICROS 3700 Applications program group and double-click the Control Panel icon.

If this icon is not located on your desktop, use the Windows Start menu to open the MICROS 3700 Applications folder.



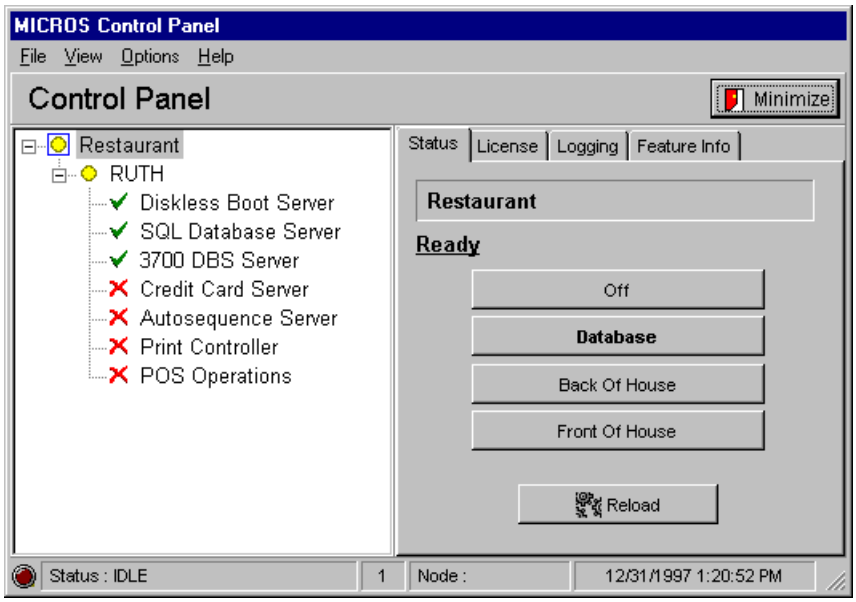
Starting the SQL Database Server

Once the Control Panel is open, select the PC that acts as the database server and click Database to start the server. The Database button will start the following processes:

- ❑ Diskless Boot Server (if installed)
- ❑ SQL Database Server
- ❑ 3700 DBS Server

Control Panel

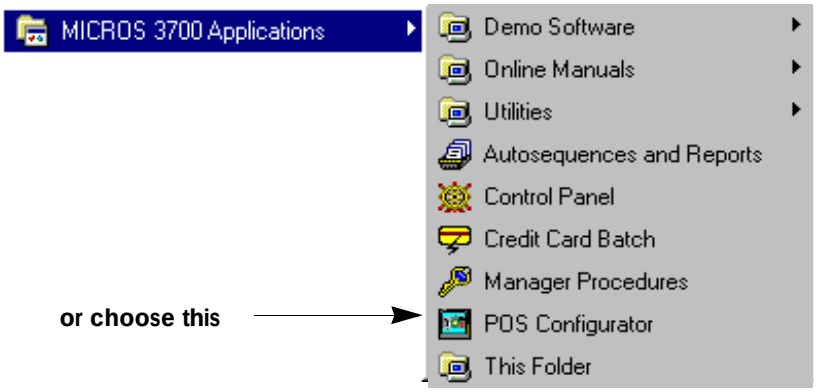
Wait for the Control Panel to display “Ready” before starting POS Configurator.



Opening POS Configurator

Double-click the POS Configurator icon on your PC's desktop.

If this icon is not located on your desktop, use the Windows Start menu to open the MICROS 3700 Applications folder.The



POS Configurator module opens. If this is the first time this database is being programmed, refer immediately to "Don't Lock Yourself Out" on page 2-7.

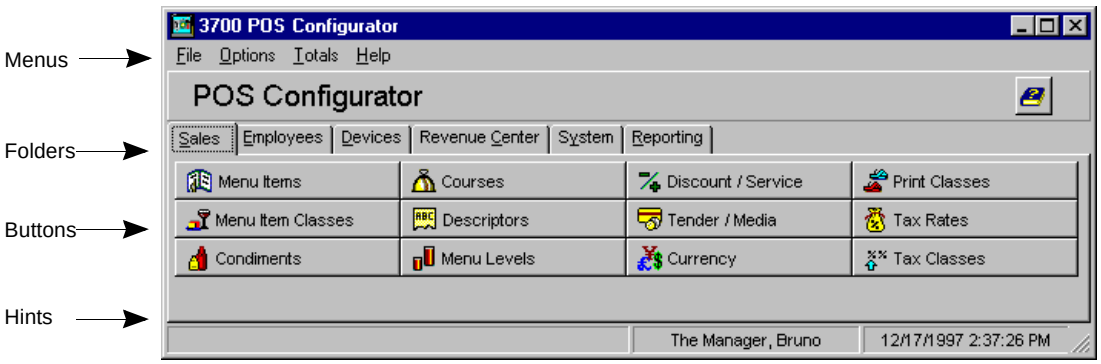
WARNING

If the steps described on page 2-7are not followed, POS Configurator will lock you out.

If this database has been opened before, the sign-in screen displays. Enter the PC Applications ID programmed in your employee record.

The Main Window

The main window provides easy access to the POS Configurator forms. Each folder on the main window displays a set of buttons that open forms. By completing the fields and options on the forms, you complete the database.

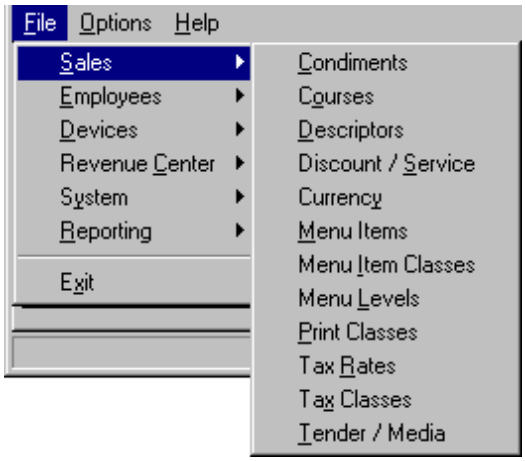


Menus

Menus provide an alternate way to access information.

The File Menu

The File menu offers the same selections as the folders and buttons. It's just another way to open a form for editing.

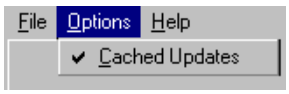


Keyboard shortcuts

in Sales you can use the keyboard combination [Ctrl] + [C] to open the Condiments form instead of clicking the Condiments button in the main window.

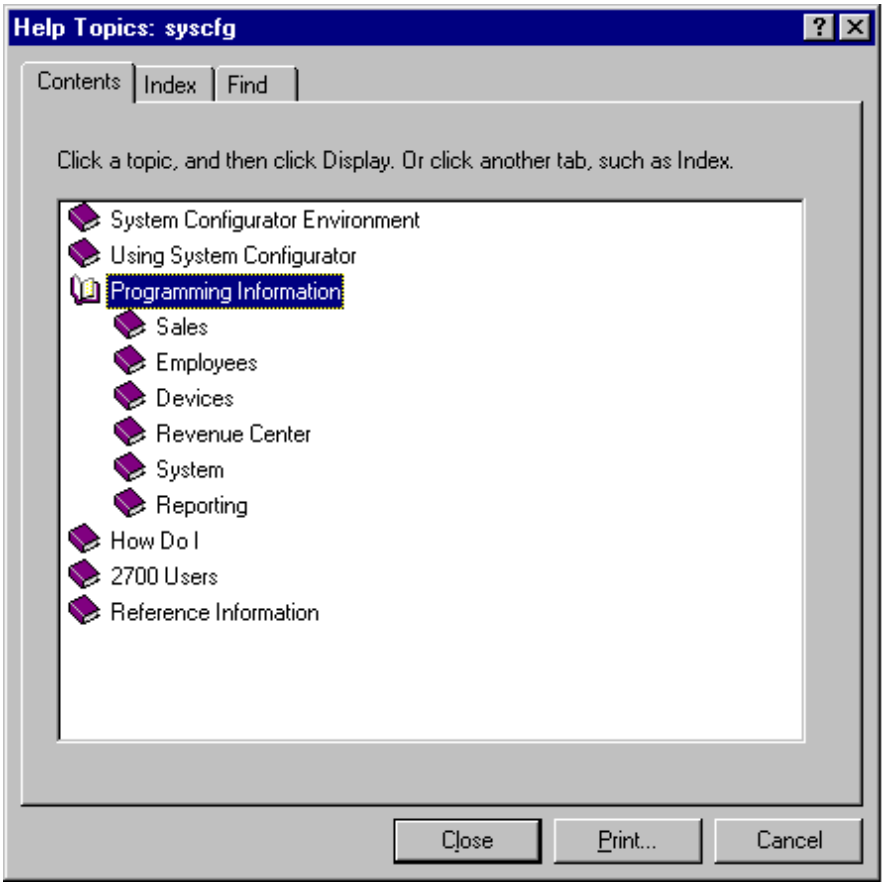
The Options Menu

The Options menu allows you to turn Caching on or off. Select Cached Updates to cause saved changes to be posted to the database when you exit a form. When this option is not selected, changes are posted to the database immediately (upon saving).



The Help Menu

POS Configurator offers online Help. Click Help in this menu to open the Table of Contents. You can select a book and browse through the pages (topics) or search for specific information in the Index.



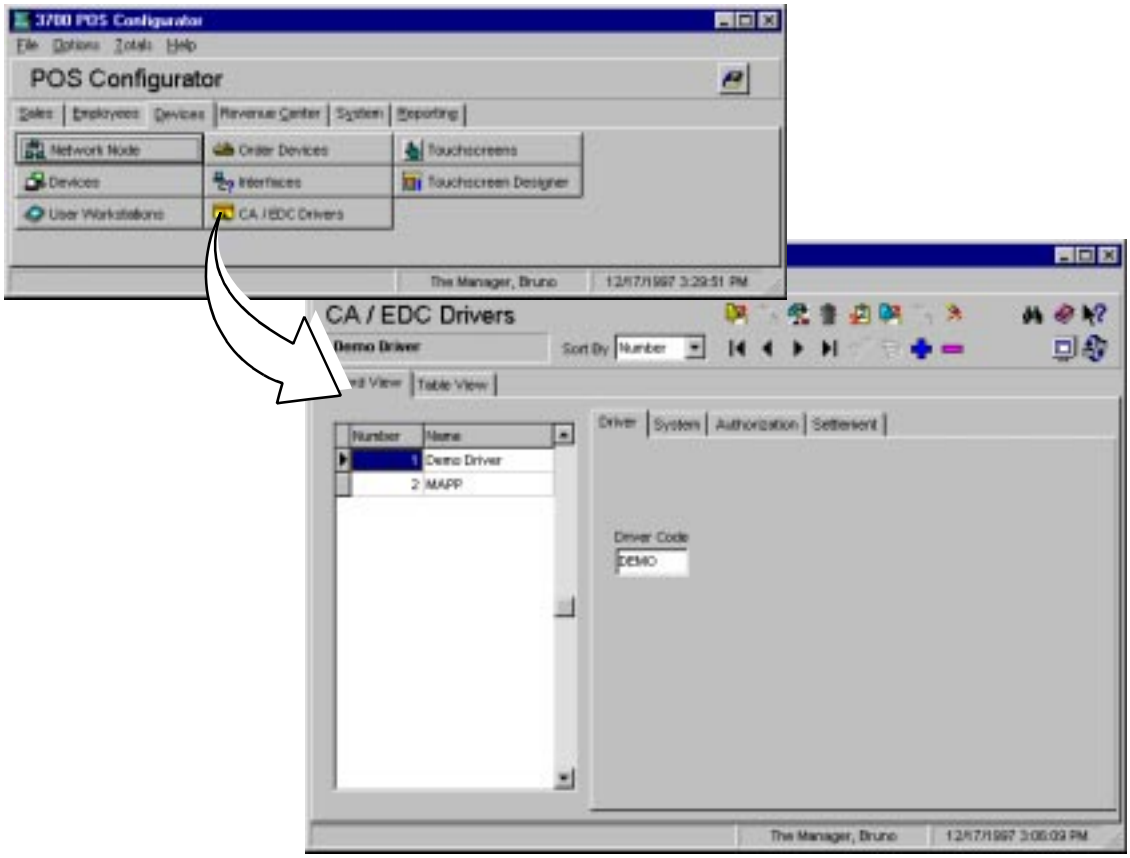
Folders

Each folder in POS Configurator contains buttons that open forms. When you click on a folder name, the buttons change to display the contents of that folder. The folders in POS Configurator include:

- ❑ Sales
- ❑ Employees
- ❑ Devices
- ❑ Revenue Center
- ❑ System
- ❑ Reporting

Buttons

The buttons on each folder open the forms for editing.



Hints

Hints appear at the bottom of each window to give you more detail about an object. To use Hints, simply place your cursor over a field, option, or object.

The Toolbar

The POS Configurator toolbar provides shortcuts to common operations. These shortcuts can save you time as you program or make changes to the database. Refer to "Quick Reference to POS Configurator Tools" on page 3-12 for an explanation of each tool.

Tool Tips

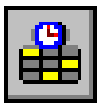
Tools tips appear when you place the cursor over a toolbar button. The tip tells you what the tool does.

Special Tools

Some forms contain special tools to speed maintenance, programming tasks, and printing.

Calendar Tool

This button appears in beside any field that requires you to select dates and times.



View Current

This button displays only active employee records in the Employees form.

View All

This button displays both active and inactive employees in the Employees form.

Print

This button will print the Employee and Menu Item definitions. This tool is only included in the Employees and Menu Item forms.

Quick Reference to POS Configurator Tools

Cut
Use this button to remove a record and save it to the clipboard. [CTRL+X]

Copy
Use this button to save selected information to the clipboard. [CTRL+C]

Paste
Use this button to place saved information in a new location. [CTRL+V]

Copy Record
Use this button to save all the information associated with a record to the clipboard. [F5]

Paste Record
Use this button to place a saved record in a new location. [F6]

Clear
Use this button to delete the information in a field. [CTRL+DEL]

Block Copy/Paste
Use this button to copy and paste a group of records. [ALT+E SHIFT+b]

Block Delete
Use this button to delete a group of records. [ALT+E SHIFT+k]

Find
Use this button to search for fields that contain a certain value. [ALT+R SHIFT+d]

First Record
Move to the first record (the beginning). [CTRL+F]

Previous Record
Move up one record. [CTRL+P]

Next Record
Move down one record. [CTRL+N]

Last Record
Move to the last record (the end). [CTRL+L]

Save Changes
Use this button to save changes to the database. **Note:** If Post Cached Updates is not selected in the Options menu, changes are automatically posted as you move between records.

[CTRL+S]

Insert
Use this button to insert a blank record. The next available record number will be used.

[Insert]

Delete Record
Use this button to remove a record.

[CTRL+DEL]

Undo
Use this button to erase the last change made. This button is only available (red) before the change is saved.

[CTRL+Z]

Main Window
Use this button to bring the Main Menu to the top of the desktop.

[ALT+F SHIFT+m]

Switch to Another Form
Use this button to switch to another open POS Configurator form.

Help
Use this button to open the help file.

[CTRL+L]

Context Sensitive Help
Use this button to get context sensitive help while working in a form. You can click on a field or option to get more information.

[CTRL+L]

View All (Employees form)
Use this button to see current and former employee information.

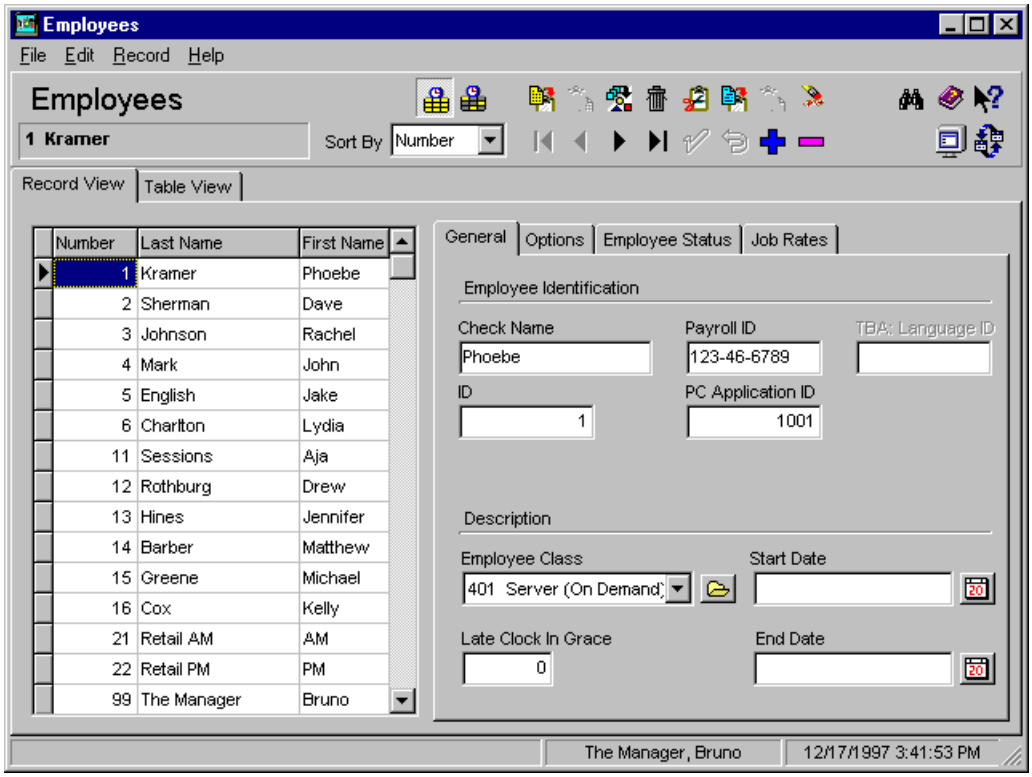
View Current (Employees form)
Use this button to only current employee information.

Working with Forms

The forms in POS Configurator allow you to enter information into the database tables. You can choose to work in either Record or Table View. In Record View, you see only the options and fields for the record that is selected. Record View is best when adding or changing a single record and Table View is best for adding or editing multiple records.

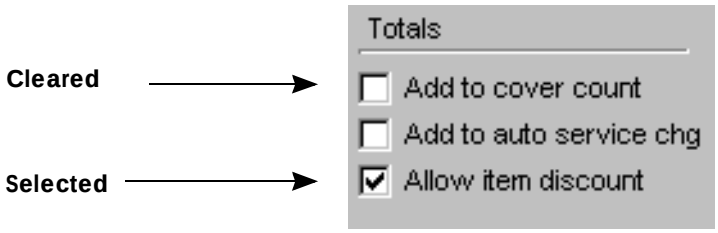
Working in Record View

In Record View, the 3700 interface uses a form to display fields and options. You can create new records in the database by completing the necessary fields and selecting the options that apply.



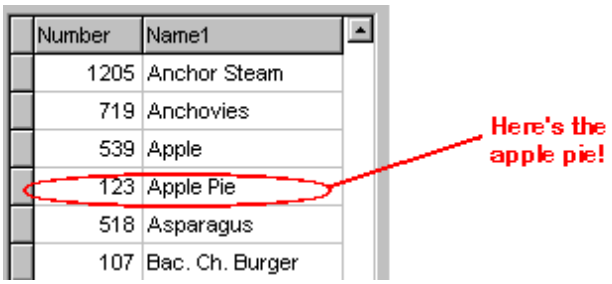
Selecting Options

Option selections appear as checkboxes when you are working in record view. To select, click the box. A check appears to indicate that the option is selected. To clear an option, click the box to remove the check.

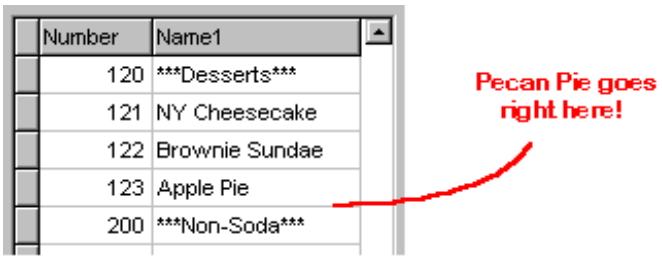


Sort By

You can sort items for display by name or by record number. Sort by name to quickly locate a certain menu item.



Sort by record number to quickly locate blank records within a group.



Tabs

Tabs within the forms organize the information into logical groups.

Folder Links

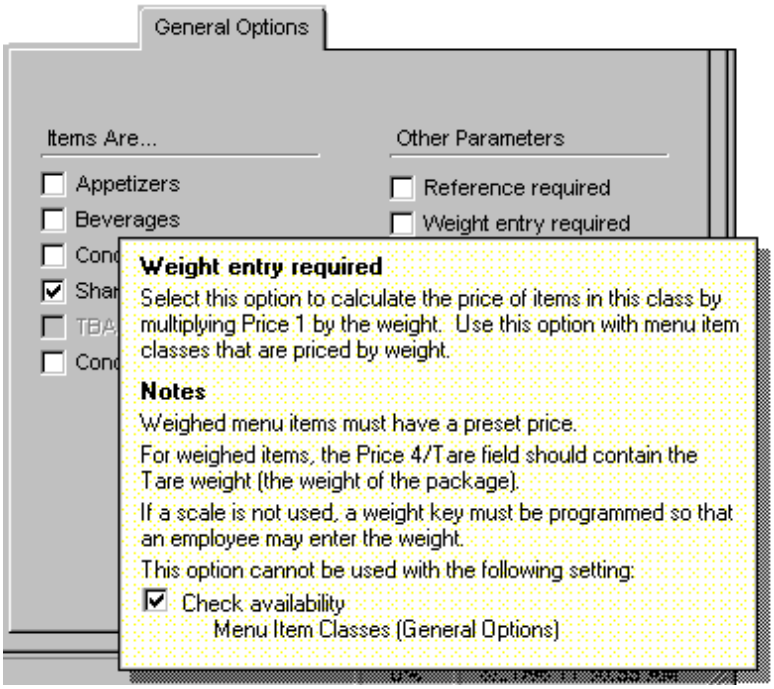
Some fields are actually links to other tables. When you click on the folder next to the field it opens the other form so you can edit or create records in that form.

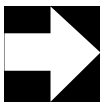
Browse

The browse button is displayed in certain form. The button will open a window containing the directory structure of the PC and allows the user to store the selected file.

Context-sensitive Help

To get information about a field or option, click the Help button. A question mark displays next to the cursor while you are in Help mode. When you click an option or field, a popup window displays detailed information. When you are finished viewing the information, click the Help button again to end Help mode. The cursor returns to normal. You may click as many fields and options as you want while in Help mode.



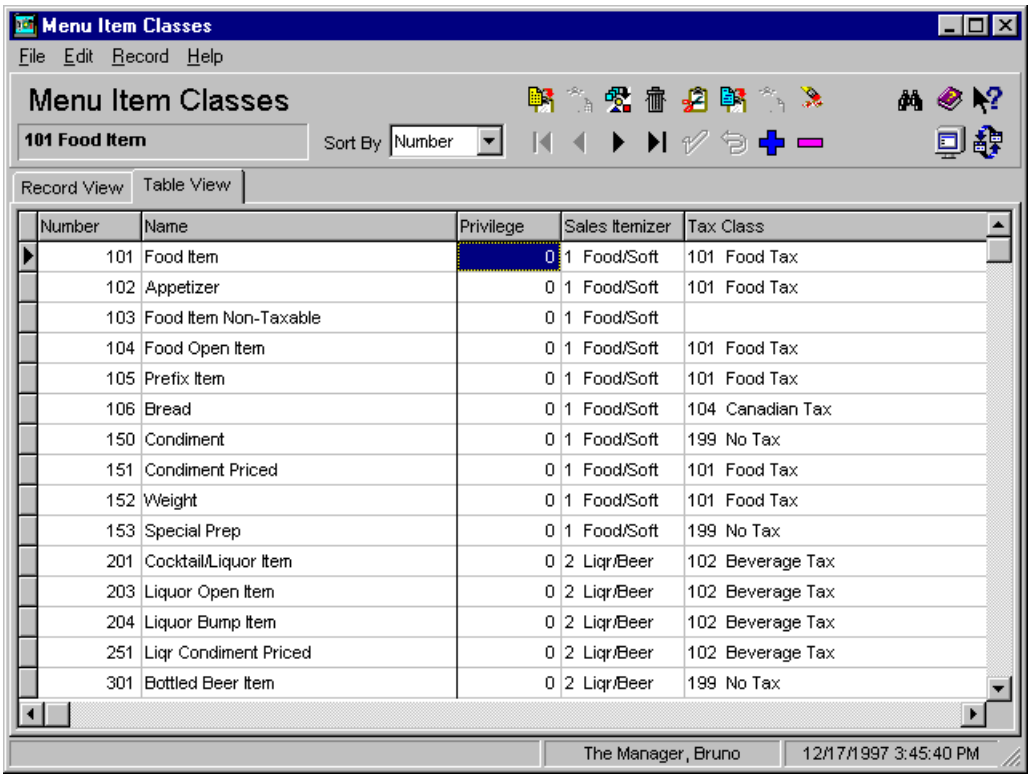


Note

You cannot select or deselect options in Help mode. You must return to normal mode before you may continue programming.

Working in Table View

Table View is best for adding multiple records. In Table View, you can copy and paste columns of information. You can also add, change, or delete multiple records more efficiently. For example, if you wanted to add three new soups to the menu, you could block copy/paste three existing soup records and then change their names, and other unique information.



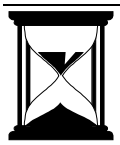
Number	Name	Privilege	Sales Itemizer	Tax Class
101	Food Item	0	1 Food/Soft	101 Food Tax
102	Appetizer	0	1 Food/Soft	101 Food Tax
103	Food Item Non-Taxable	0	1 Food/Soft	
104	Food Open Item	0	1 Food/Soft	101 Food Tax
105	Prefix Item	0	1 Food/Soft	101 Food Tax
106	Bread	0	1 Food/Soft	104 Canadian Tax
150	Condiment	0	1 Food/Soft	199 No Tax
151	Condiment Priced	0	1 Food/Soft	101 Food Tax
152	Weight	0	1 Food/Soft	101 Food Tax
153	Special Prep	0	1 Food/Soft	199 No Tax
201	Cocktail/Liquor Item	0	2 Liqr/Beer	102 Beverage Tax
203	Liquor Open Item	0	2 Liqr/Beer	102 Beverage Tax
204	Liquor Bump Item	0	2 Liqr/Beer	102 Beverage Tax
251	Liqr Condiment Priced	0	2 Liqr/Beer	102 Beverage Tax
301	Bottled Beer Item	0	2 Liqr/Beer	199 No Tax

Adding Records

POS Configurator makes it easy to add new records to the database. You can add a new employee or a new group of menu items simply by inserting a record in the corresponding file. If you are adding a long list of items, you may want to work in table view. See "Working in Table View" on page 3-17.

To add a record

1. Click the record below which you wish to add a new record.
2. Click Insert. POS Configurator creates a new record and automatically assigns the next available record number.
3. Enter a name for the new record.
4. Complete the associated fields and options that define this item.



Tip

Use the [Tab] key to move through the fields more quickly.

Copying and Pasting Single Records

You can copy and paste a single field or an entire record. Use Copy and Paste in Table view to add new items to the database.

To add a record using copy and paste

1. Select the record you want to duplicate.
2. Click Copy Record. POS Configurator copies the record to the clipboard.
3. Use the Insert button to create a blank record if one is needed.
4. Click Paste Record. POS Configurator duplicates the record at the next available record number.
5. Give the new record a unique name and modify as needed.
6. Click Save.

To copy and paste a field

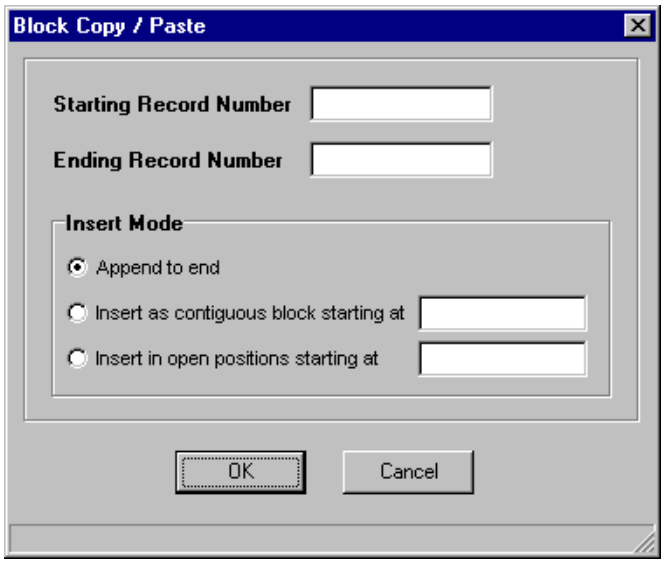
1. Select the field you want to copy.
2. Click Copy.
3. Click in the field where you want to paste the information.
4. Click Paste.
5. Click Save.

Block Copying and Pasting Records

You can copy a range of records and paste them in a new location using Block Copy/Paste. This is useful for adding a group of new records which share many of the same characteristics as existing records. For example, you may want to add three new salads to the menu by copying three existing salad records and changing the names.

To copy and paste a block of records

1. Select the first record in the range you want to copy.
2. Click Block/Copy Paste. POS Configurator displays a dialog box.



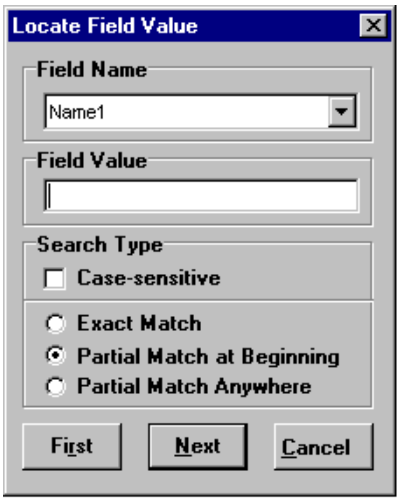
3. Type the range of record numbers you want to copy.
4. Select a paste option.
5. Click OK.

Finding a Record

You can locate records within a form using Find. This is useful for searching a form that contains a long list of records, or for making changes to records that share a value. For example, you can search for a particular employee record by name, or find all the menu item records with the same price.

To find a record

1. Click Find. POS Configurator displays a dialog box.



2. Choose a the name of the field you want to search.
3. Enter the word or number in Field Value.
4. Select the search parameters you wish to use.
5. Click First.

Editing a Record

Edits may be completed in Table View or Record View.

To edit a record

1. Click the field you want to edit.
2. Type the new information.
3. Click Save.

To clear a field

1. Click the field you wish to clear.
2. Click Clear.

Deleting Single Records

You may occasionally need to delete a record from the database. For example, a menu item that's been discontinued could be deleted.

To delete a record

1. Click the record you want to delete.
2. Click Delete. The system asks you to confirm the deletion.
3. Click OK. The record is removed from the database.

Tip

To disable a menu item or employee record, but preserve it in the database for future use, use the *Effective To* field to make it inactive.

Block Deleting Records

You can easily remove a range of records using Block Delete.

To delete a block of records

1. Click Block Delete. A dialog box displays.

2. Type the record numbers for the range of records you want to delete.
3. Click OK. The system asks you to confirm the deletion.
4. Click OK.

Saving Changes

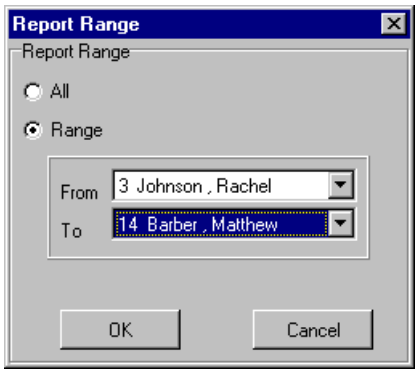
To save a change

1. Click Save.

Printing Employee and Menu Item Definitions

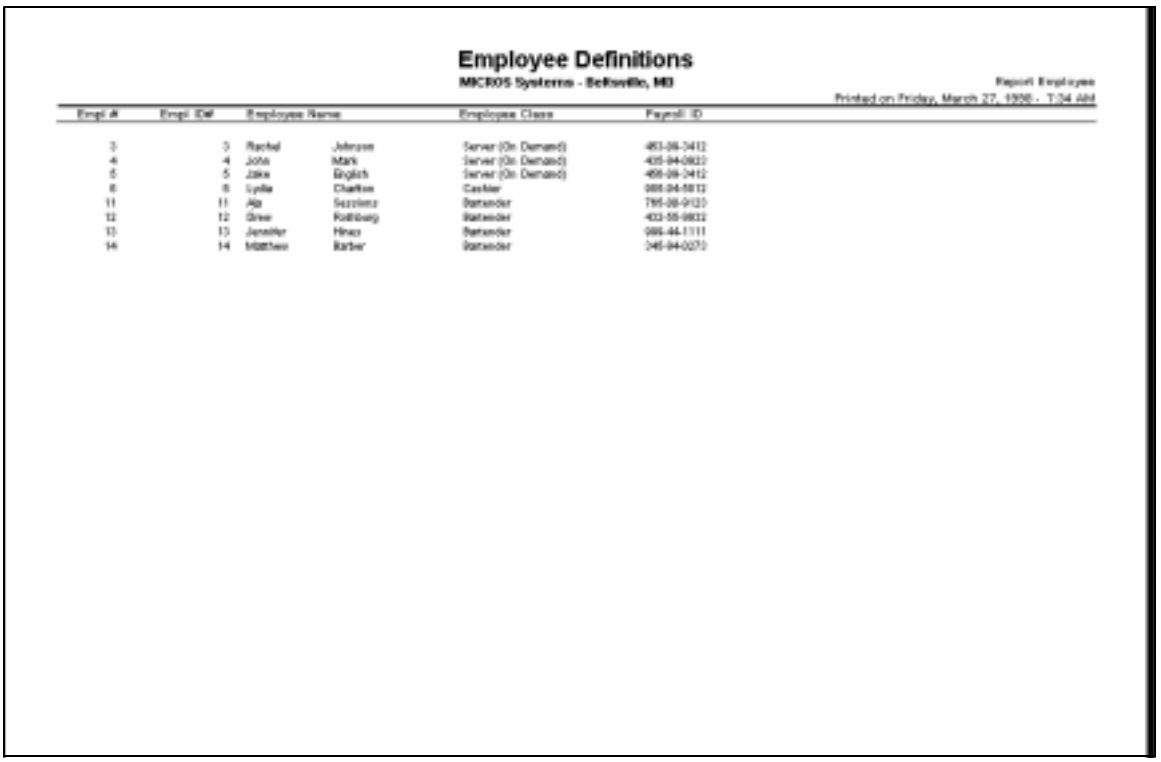
There is a print button on the Employee and Menu Item forms. The button will print out a report with either all, or a range of definitions.

When the print button is selected, the following will be displayed:

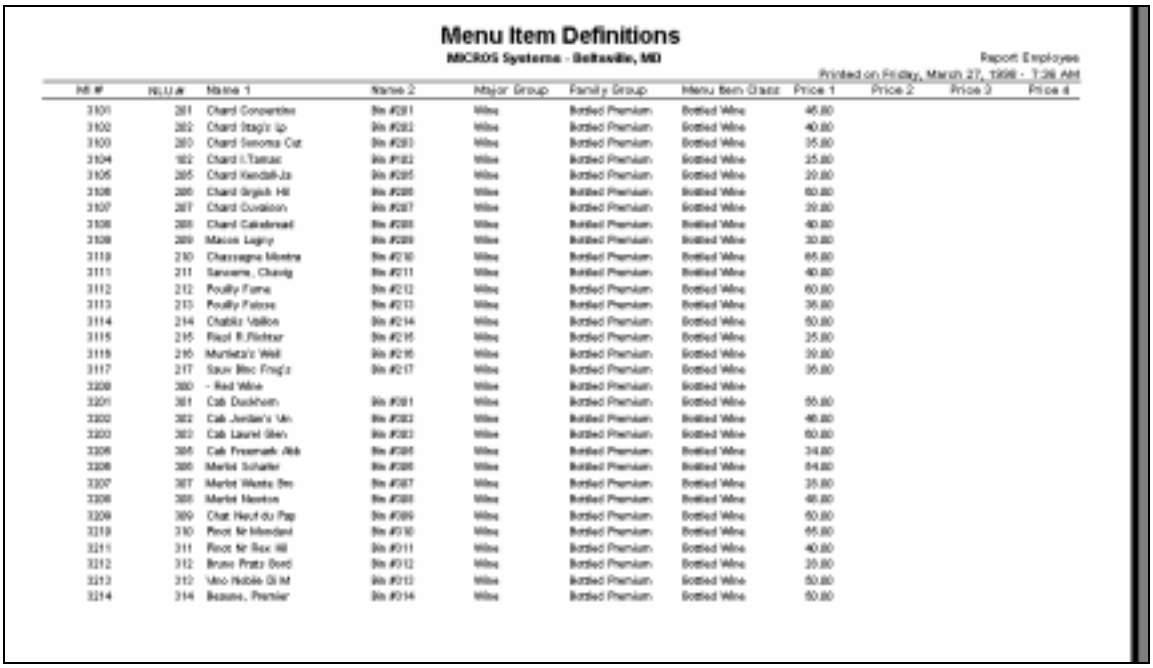


When Range is selected, the From and To pull down menus will be active. When All is selected, the From and To pull down menus will be inactive.

Employee Definition Report



Menu Item Definition Report



Menu Item Definitions

MICROS Systems - Bellsville, MD

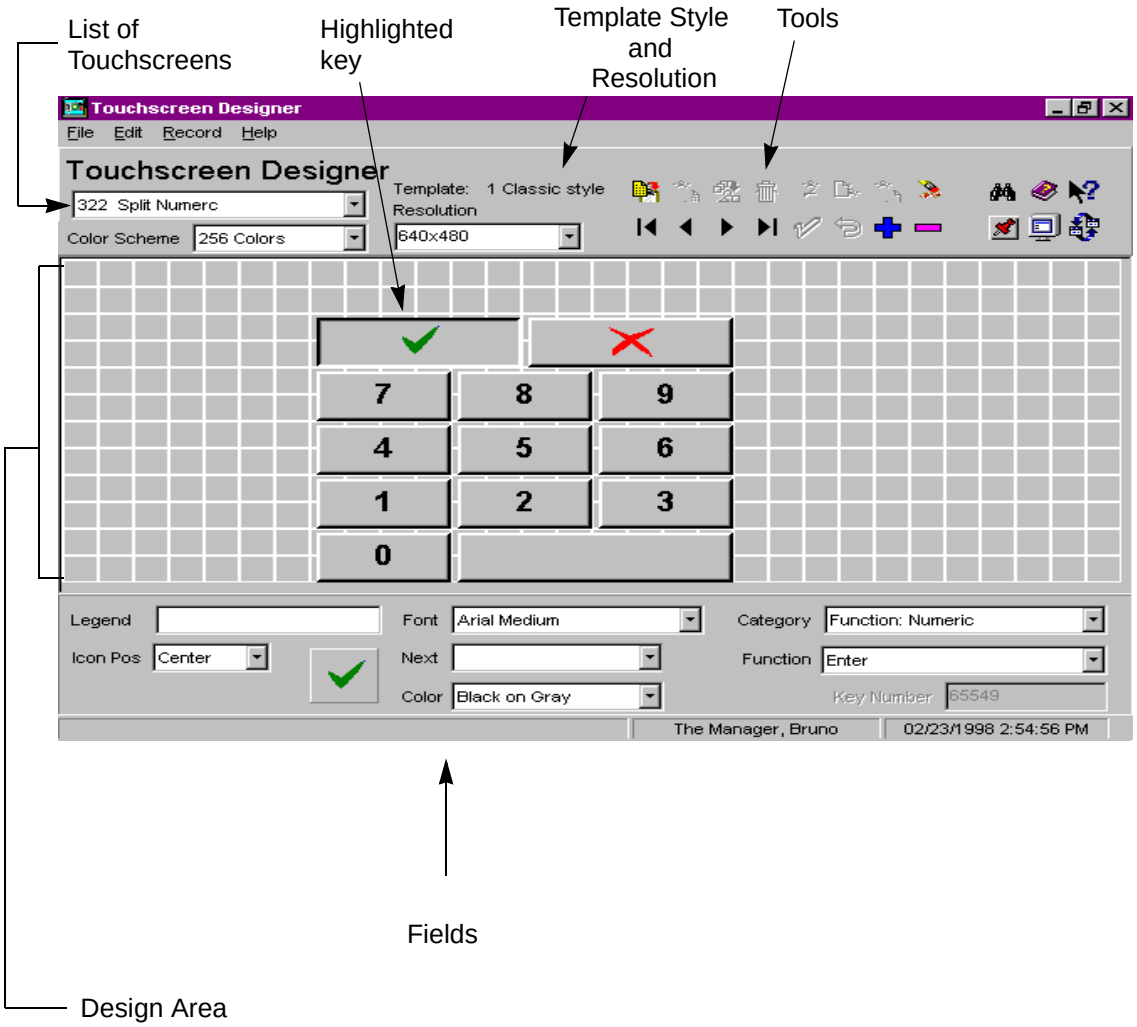
Report Employee

Printed on Friday, March 27, 1998 - 7:26 AM

MI #	MLU #	Name 1	Name 2	Major Group	Family Group	Menu Item Class	Price 1	Price 2	Price 3	Price 4
3101	201	Chard Corvantou	Ste #201	Wine	Bottled Premium	Bottled Wine	45.00			
3102	202	Chard Stag'z Lp	Ste #202	Wine	Bottled Premium	Bottled Wine	40.00			
3103	203	Chard Sonoma Cut	Ste #203	Wine	Bottled Premium	Bottled Wine	35.00			
3104	102	Chard I.Tamac	Ste #102	Wine	Bottled Premium	Bottled Wine	25.00			
3105	205	Chard Kendall-Ja	Ste #205	Wine	Bottled Premium	Bottled Wine	20.00			
3106	206	Chard Grgich Hil	Ste #206	Wine	Bottled Premium	Bottled Wine	60.00			
3107	207	Chard Duvaloon	Ste #207	Wine	Bottled Premium	Bottled Wine	30.00			
3108	208	Chard Cakebread	Ste #208	Wine	Bottled Premium	Bottled Wine	40.00			
3109	209	Macon Lugny	Ste #209	Wine	Bottled Premium	Bottled Wine	30.00			
3110	210	Champagne Montra	Ste #210	Wine	Bottled Premium	Bottled Wine	65.00			
3111	211	Sancerre, Chavig	Ste #211	Wine	Bottled Premium	Bottled Wine	40.00			
3112	212	Pouilly Fume	Ste #212	Wine	Bottled Premium	Bottled Wine	60.00			
3113	213	Pouilly Fetcre	Ste #213	Wine	Bottled Premium	Bottled Wine	35.00			
3114	214	Chablis Vaillon	Ste #214	Wine	Bottled Premium	Bottled Wine	50.00			
3115	215	Rsyl R.Richbur	Ste #215	Wine	Bottled Premium	Bottled Wine	25.00			
3116	216	Murlleta'z Well	Ste #216	Wine	Bottled Premium	Bottled Wine	30.00			
3117	217	Saun Blac Frog'z	Ste #217	Wine	Bottled Premium	Bottled Wine	35.00			
3200	300	- Red Wine		Wine	Bottled Premium	Bottled Wine				
3201	301	Cab Duckhorn	Ste #301	Wine	Bottled Premium	Bottled Wine	55.00			
3202	302	Cab Jordan's Un	Ste #302	Wine	Bottled Premium	Bottled Wine	45.00			
3203	303	Cab Laurel Glen	Ste #303	Wine	Bottled Premium	Bottled Wine	60.00			
3204	304	Cab Freemark Ab	Ste #304	Wine	Bottled Premium	Bottled Wine	34.00			
3206	306	Merlot Schaefer	Ste #306	Wine	Bottled Premium	Bottled Wine	64.00			
3207	307	Merlot Wente Bro	Ste #307	Wine	Bottled Premium	Bottled Wine	35.00			
3208	308	Merlot Newton	Ste #308	Wine	Bottled Premium	Bottled Wine	48.00			
3209	309	Chat Neuf du Pap	Ste #309	Wine	Bottled Premium	Bottled Wine	50.00			
3210	310	Pinot Nr Mondavi	Ste #310	Wine	Bottled Premium	Bottled Wine	65.00			
3211	311	Pinot Nr Rex Hill	Ste #311	Wine	Bottled Premium	Bottled Wine	40.00			
3212	312	Brunc Pratz Gord	Ste #312	Wine	Bottled Premium	Bottled Wine	30.00			
3213	313	Vino Nobile Di M	Ste #313	Wine	Bottled Premium	Bottled Wine	50.00			
3214	314	Beaune, Premier	Ste #314	Wine	Bottled Premium	Bottled Wine	50.00			

Using Touchscreen Designer

The illustrations below will help you get acquainted with Touchscreen Designer.



Touchscreen Designer Fields

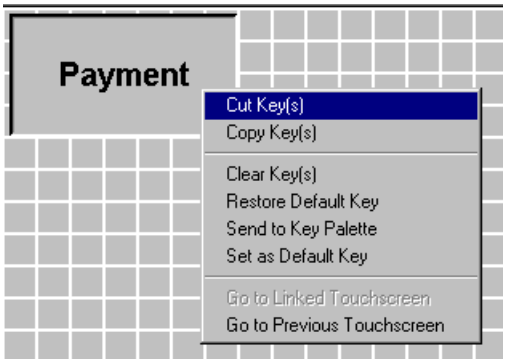
Legend	Enter the word or phrase to display on this key.
Icon	Select an icon to display on the key if one is desired.
Icon Pos	Select a position for this icon: Left, Right, Top, Bottom, Center
Font	Select a font to display the legend for this key.
Color	Select a color combination for this key.
Next	Enter the Next touchscreen to display when this key is pressed if appropriate.
Category	Select the correct key category for this key.
Function	Select the action this key performs.
Key Number	This field is completed automatically when you select the Category and Function.
Template	Displays the selected template.
Resolution	Select the resolution to change the display size.

Changing the default key size

The default key size can be changed to automatically insert the desired key on the touchscreen without having to manually change the key size. To set a new default key size, right-click on a key and select Set As Default Key. This is now the default key size, color, and font. To change back to the original default key size, right-click on the design grid and select Restore Default Key.

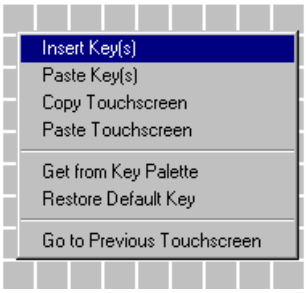
Right-click touchscreen key

The following menu will pop up when you right-click a touchscreen key. You can then choose any of the options listed.



Right-click touchscreen

The following menu will pop up when you right-click any area of the touchscreen. You can then select from any of the options.



Multiple Select

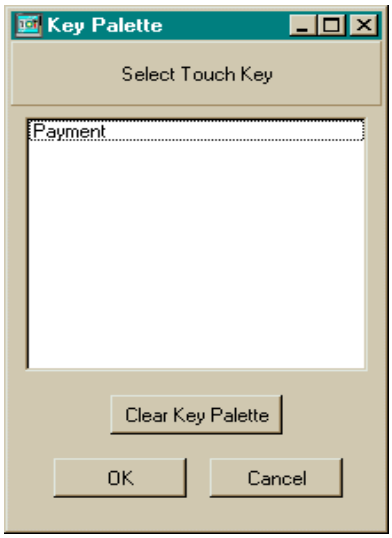
Multiple Select allows you to select several touchscreen keys by holding the PC keyboard's [Control] key while selecting the touchscreen keys. The user can then edit every key selected at once.

Drag and Resize

The drag and resize option allows you to move and resize keys that already exist on the touchscreen. Any single key can be resized by using the cursor to drag the key's border to the desired size. Any key can be moved across the screen by selecting the key and dragging it to the desired spot on the touchscreen.

The Key Palette

The key palette is a type of "clipboard" on which one or more keys can be stored while designing a touchscreen. Keys can be moved from the touchscreen to the key palette and back again.

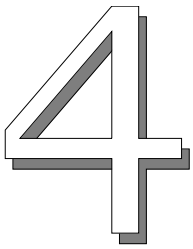


To enable the key palette, click the key palette button on the tool bar.

To add a key to the key palette, right-click on the key you wish to move and select Send To Key Palette. There are two ways to bring a key back from the key palette:

- Place the cursor on the touchscreen field and right-click. Select Get From Key Palette. The key palette displays: Select the key you want and press OK.
- Open the key palette and highlight the key you wish to bring back to the touchscreen. Click OK. The key will be moved from the key palette to the touchscreen.

Chapter



Devices

The Devices folder is your gateway to configuring the hardware devices used in a restaurant. It includes forms for programming user workstations, printers, touchscreens, and interfaces with other systems.

In this chapter

Overview 4-2
Network Node 4-3
Devices 4-5
Order Devices 4-8
User Workstations 4-11
Interfaces 4-18
CA/EDC Drivers 4-20
Touchscreens 4-24
Touchscreen Designer 4-27

Overview

Complete the forms in the Devices folder in following order to configure the system hardware:

1. Network Node
2. Devices
3. Order Devices
4. User Workstations
5. Interfaces
6. CA/EDC Drivers
7. Touchscreens
8. Touchscreen Designer

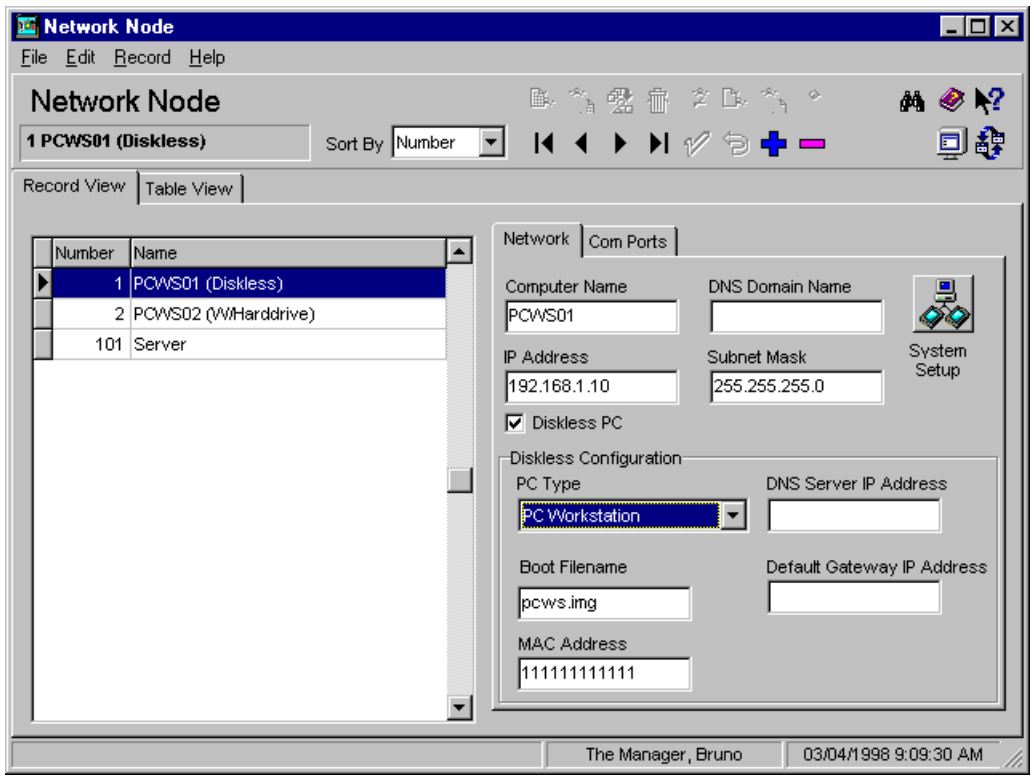
Network Node

In the Network Node form, create a unique name for each PC in the system, and associate it with the computer's name. Choose a name that identifies the location of each node for quick access.

Programming

Network

Program a network name, IP Address, and Subnet Mask for each PC. Also program all Diskless PCs in the system.

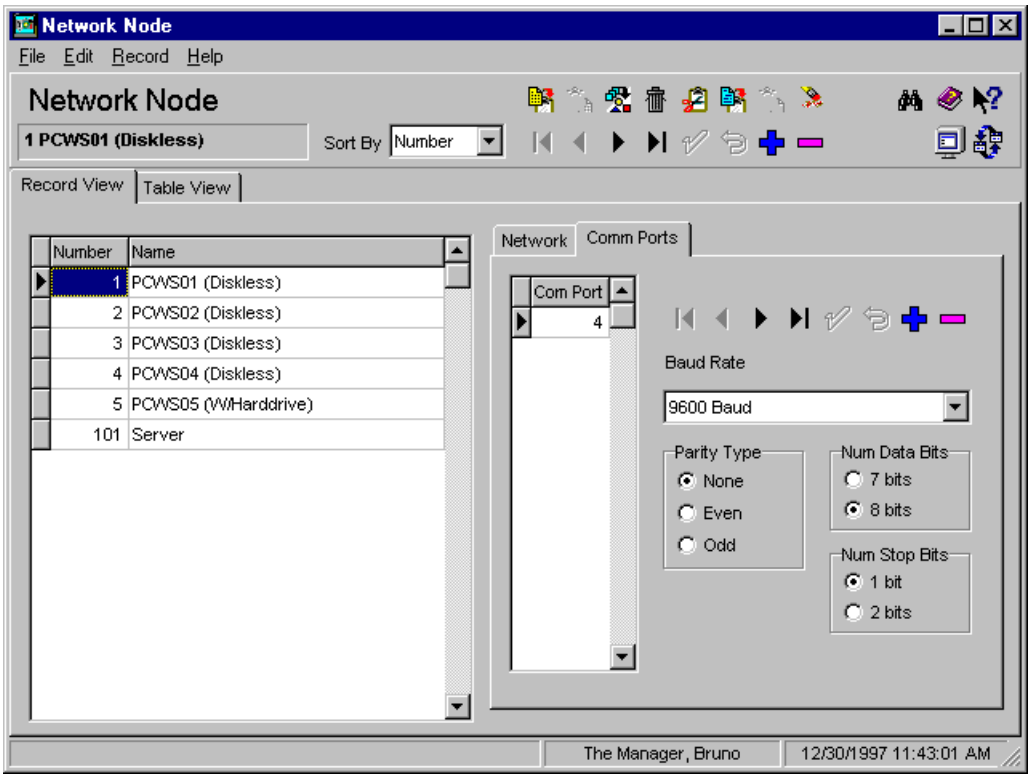


Example

In the example above, the Server is located near the kitchen and the third workstation is located at the host station. They are named Server and PCWS03 (Diskless).

COM Ports

Program COM ports and parameters..



Devices

Use the Devices folder to identify each physical device in the system. Select a name that identifies the function of the device. For example, *Bar Printer* is more descriptive than *Printer #5*.

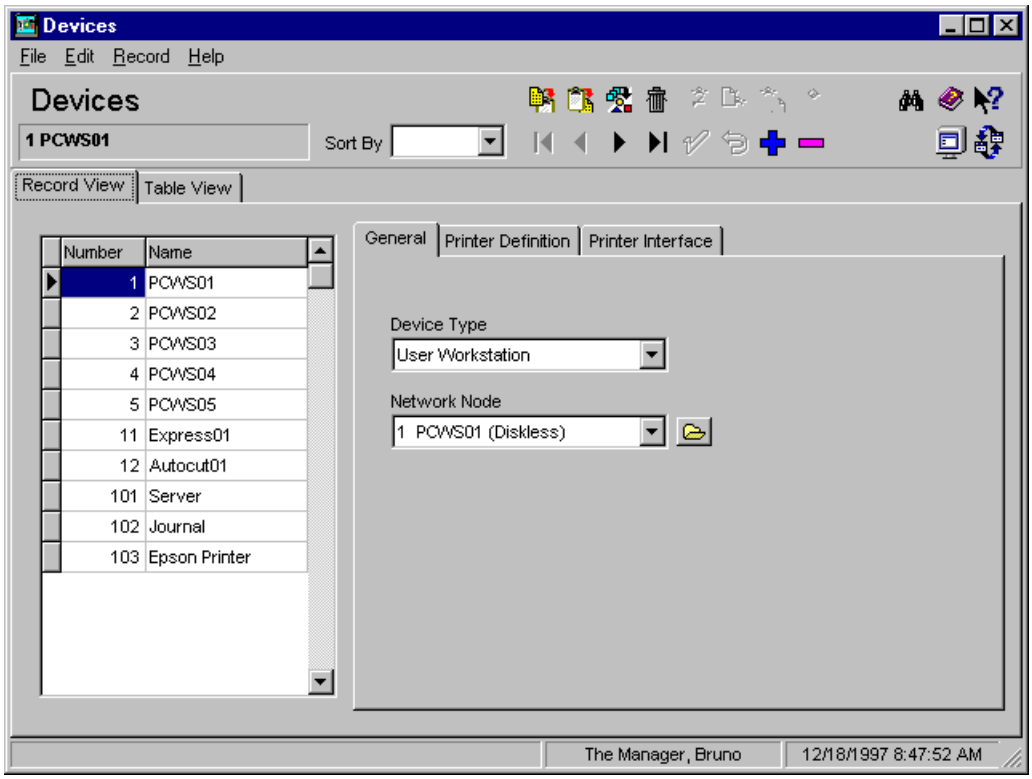
Methods
When listing devices you can:

- ❑ List every UWS first, followed by peripheral devices.
- ❑ List each UWS with its associated peripheral devices immediately below.

Programming

General

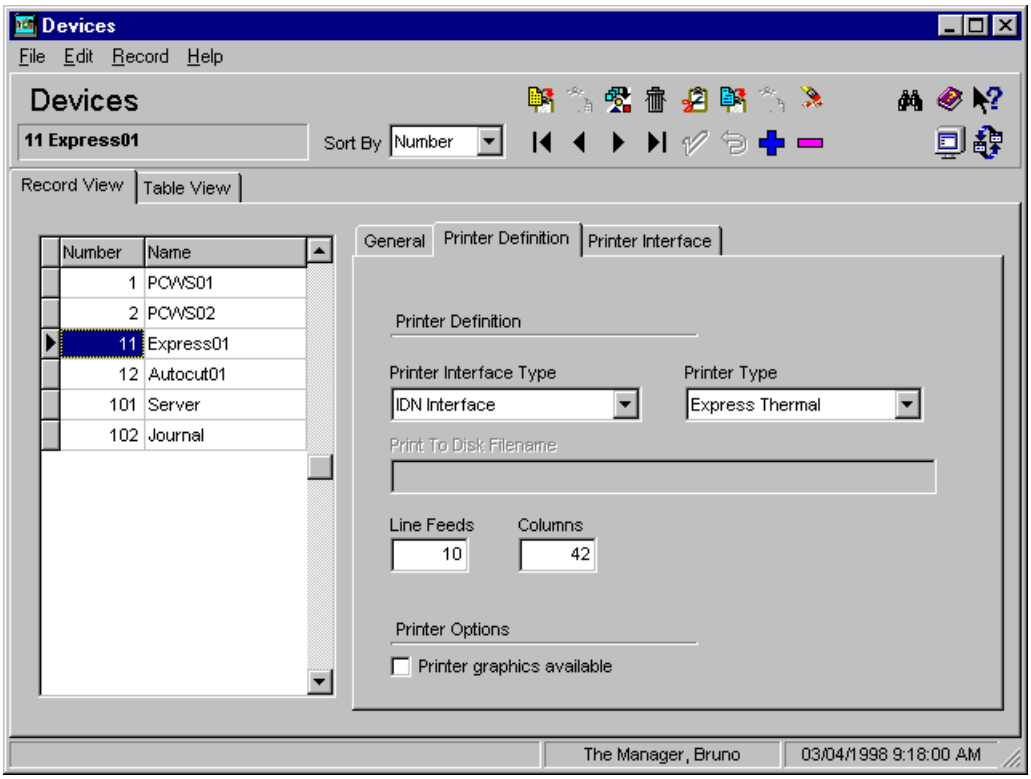
Name and identify each physical device in this system.



Example
In the example above all PCWS are listed first with the printer(s) listed last.

Printer Definition

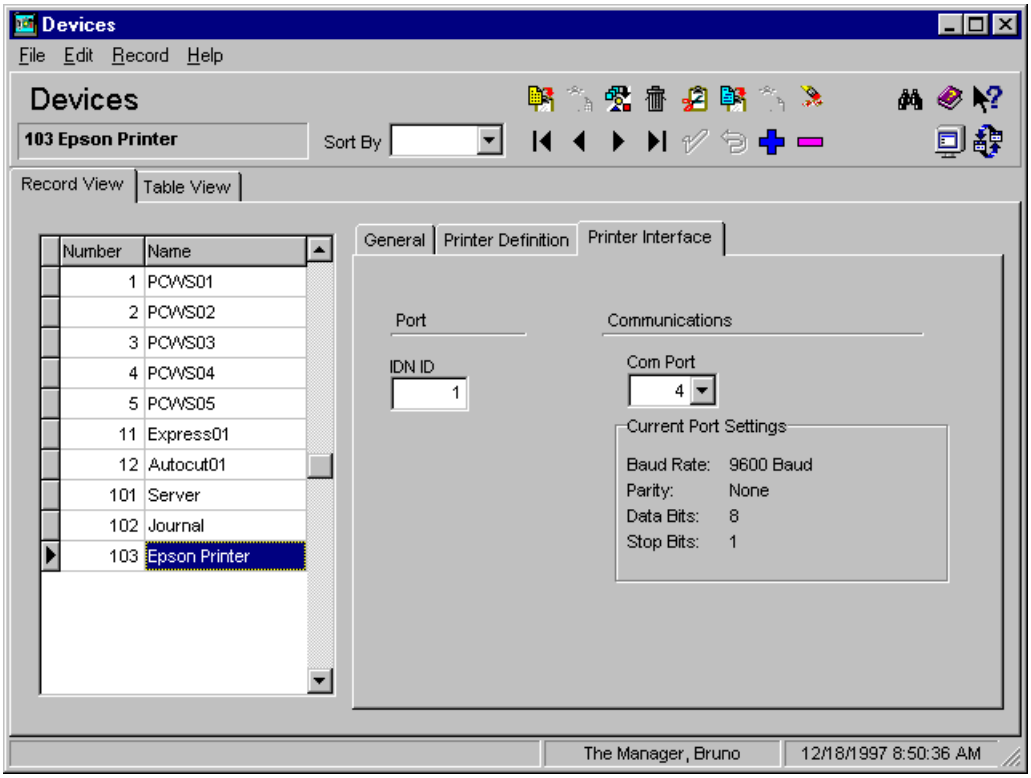
If the device is a printer, specify its type and settings.



Example
In the example above, record number 2 is identified as an Express Thermal with 42 *Columns* and 10 *Linefeeds*.

Printer Interface

If the device is a printer, specify its IDN ID (if required) and its com port.



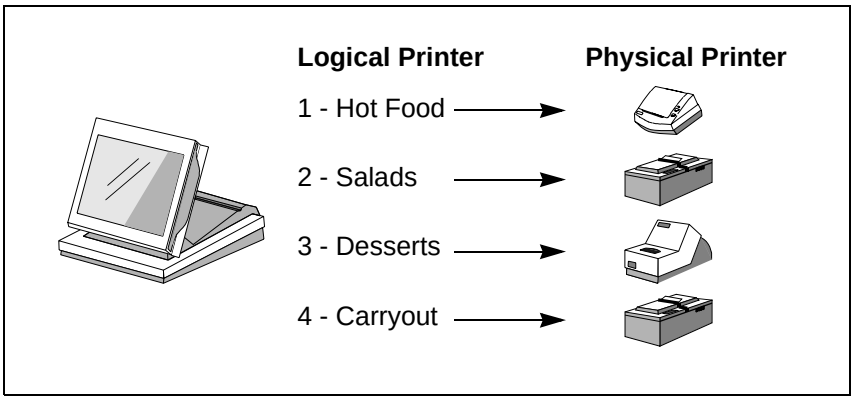
Example
The example above shows the *IDN ID* and *COM Port* for the Epson Printer.

Order Devices

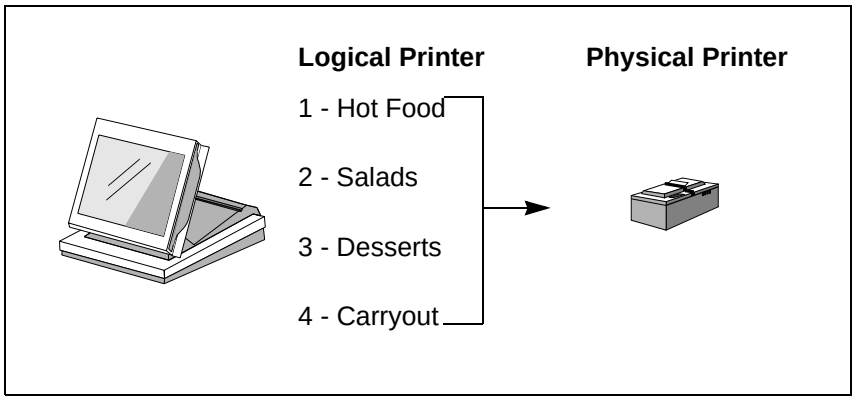
Use the Order Devices folder to configure the devices that print order output in this restaurant.

Using Logical Order Devices
It is possible to list more order devices than there are physical printers in the system, by creating "logical" devices. When logical devices are used, a single device, such as a thermal printer, can accept remote orders for several "logical" printers. The logical devices you program in the Order Devices form are available whenever a remote order device is selected in the following forms: User Workstation, Menu Items, Tender/Media, Discount/Service Charge.

Instead of having a separate printer for each type of printing...



...one printer handles multiple tasks. Each logical printer can be programmed with its own header and option selections.



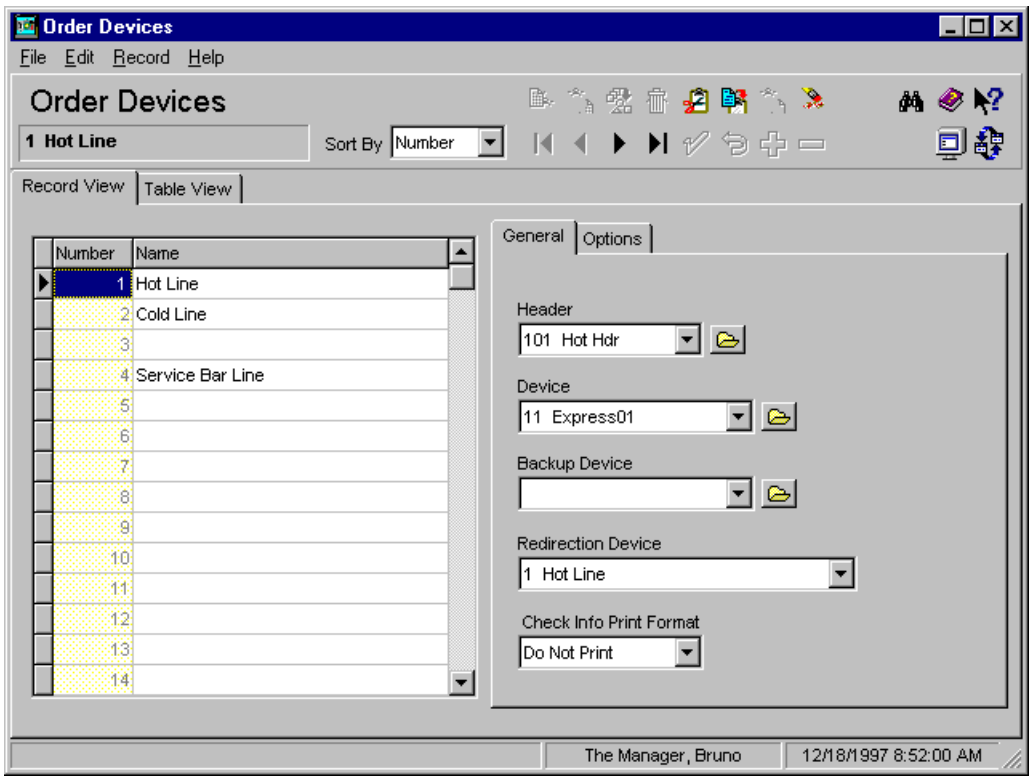
Backup and Redirection Devices

A backup printer takes over the printing for a device if it fails to operate. (It can fail to operate when it's out of paper, for example.) A redirection device allows the output for a printer to be rerouted automatically. For example, an autosequence might be created that includes redirecting order output during a certain serving period in the restaurant.

Programming

General

Create a record for each logical order device this restaurant will use. Use the folder link to go to Descriptors | Headers and create a header for each order device.

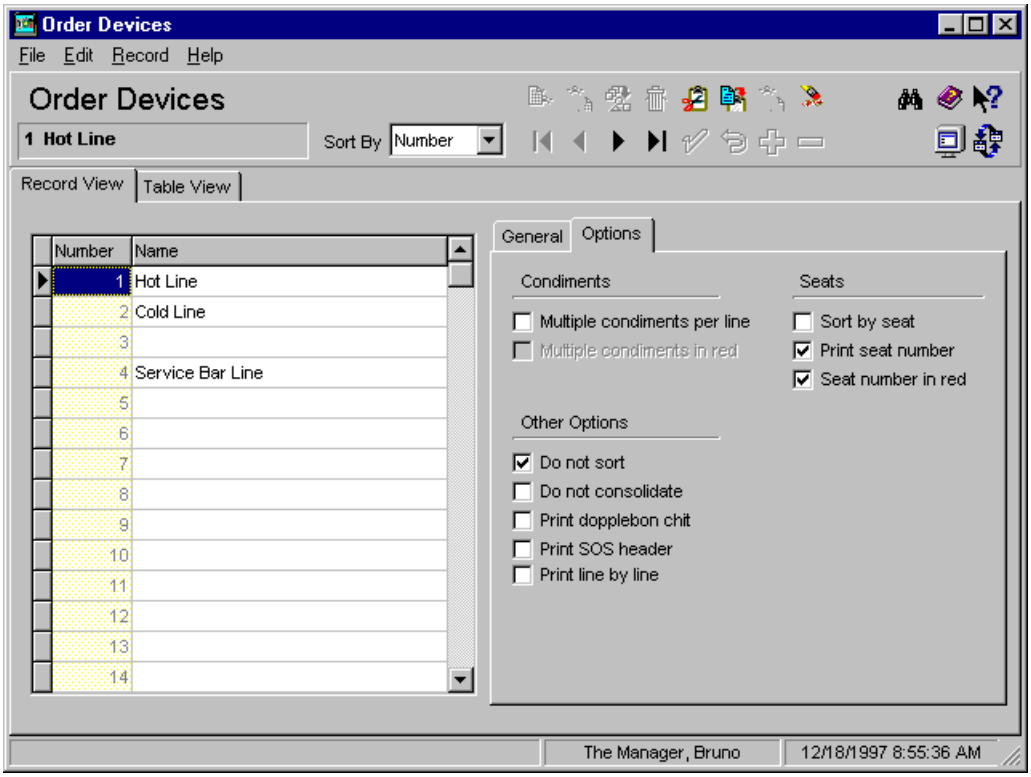


Example

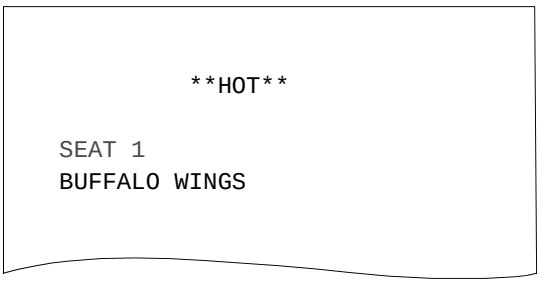
In the example above, the Hot and Cold Line printers are actually the same physical device. However, by using logical order devices, this restaurant displays the Header **HOT** when printing hot food to the Express Thermal.

Options

Select options to control the appearance of order chits printed by each device.



Example
In the example above, this restaurant selects options that cause the seat number to print on order device output.



User Workstations

Use the User Workstations form to assign touchscreens, options, order devices, and printers to each UWS. Option settings can be customized for each UWS. For example, the auto sign out of employees at the UWS behind the bar may be disabled, but remain active at the wait staff's UWS.

Guest check, and credit authorization/endorsement printers should be convenient to the workstation they serve. Remote printers should be convenient to the kitchen area they serve.

Assigning Default Screens

You may choose to assign default touchscreens by Employee Class, UWS, or revenue center. The following table shows the priority the 3700 system gives to each screen.

Priority Level	Field	Form
1	Training Screen	RVC Touchscreens form, Touchscreens tab
2	Default Touchscreen	Employee Classes form, Clock In/Sign In tab
3	Default Transaction	User Workstations form, General tab
4	Default Transaction	RVC Touchscreens form, Touchscreens tab

Cash Drawer Assignments

Cash drawers may be assigned in two ways in the 3700 system, by UWS or by employee.

To assign cash drawers by UWS

Select the option *Assign drawer by UWS* in the User Workstations (Cashier) form.

Program an [Assign/Change cash drawer] key in this revenue center's SLU.

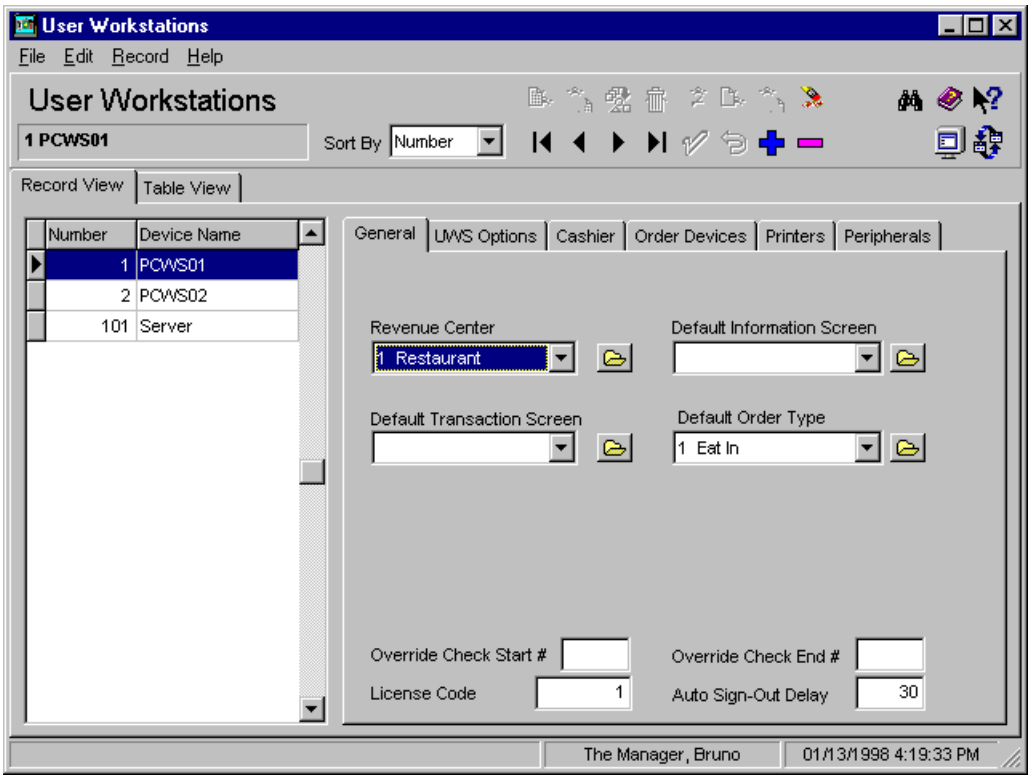
Select the *Open drawer* option for Tender/Media keys that should cause the cash drawer to open.

Programming

General

Make selections for each UWS. Use the folder link to go to RVC Transactions to create a name for each revenue center. Use the folder link to go to Order Types to create the order types for this restaurant.

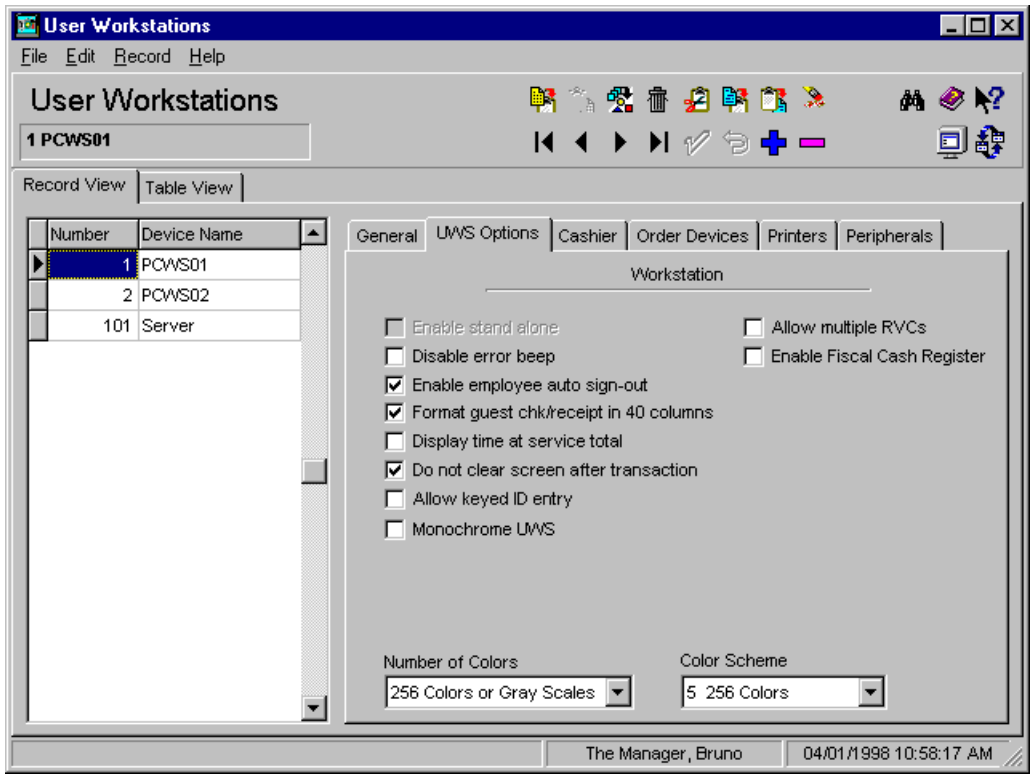
Make a note to return to the *Default Transaction* field after Touchscreen programming is complete if you are assigning default screens by UWS.



Example
In the example above, PCWS01 is assigned to the revenue center called Restaurant. Because no *Default Transaction Touchscreen* is selected, this UWS will display the touchscreen assigned to the revenue center in RVC Touchscreens.

UWS Options

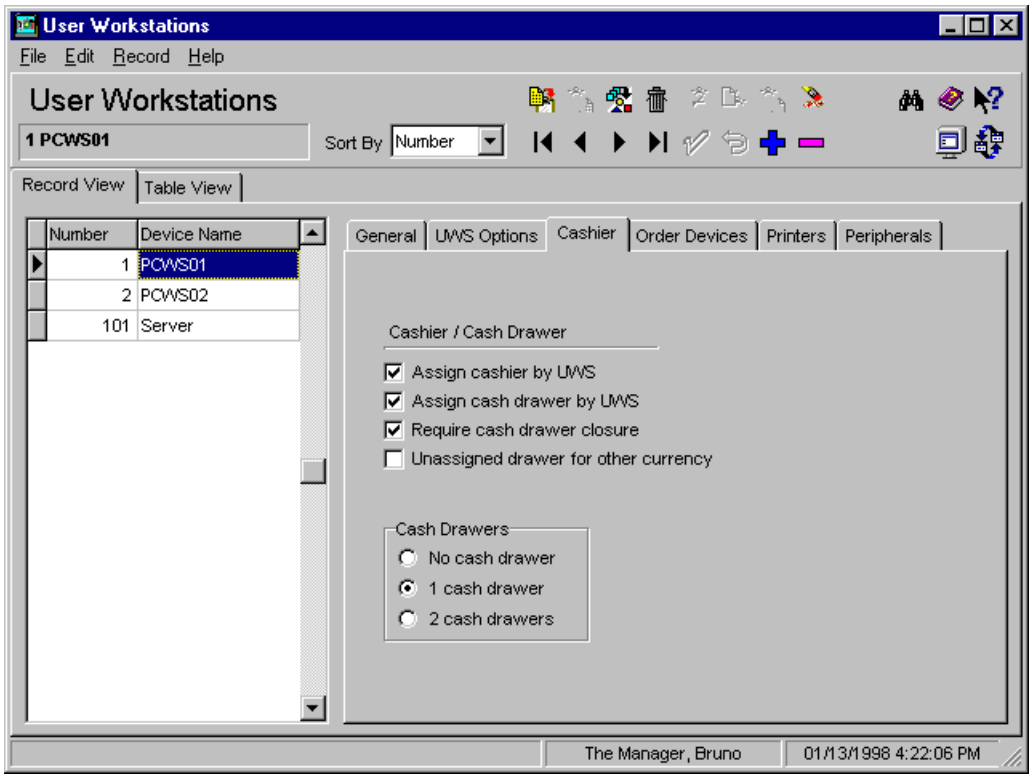
Select the desired options for each UWS.



Example
This restaurant chooses to display 256 Colors on the PCWS01.

Cashier

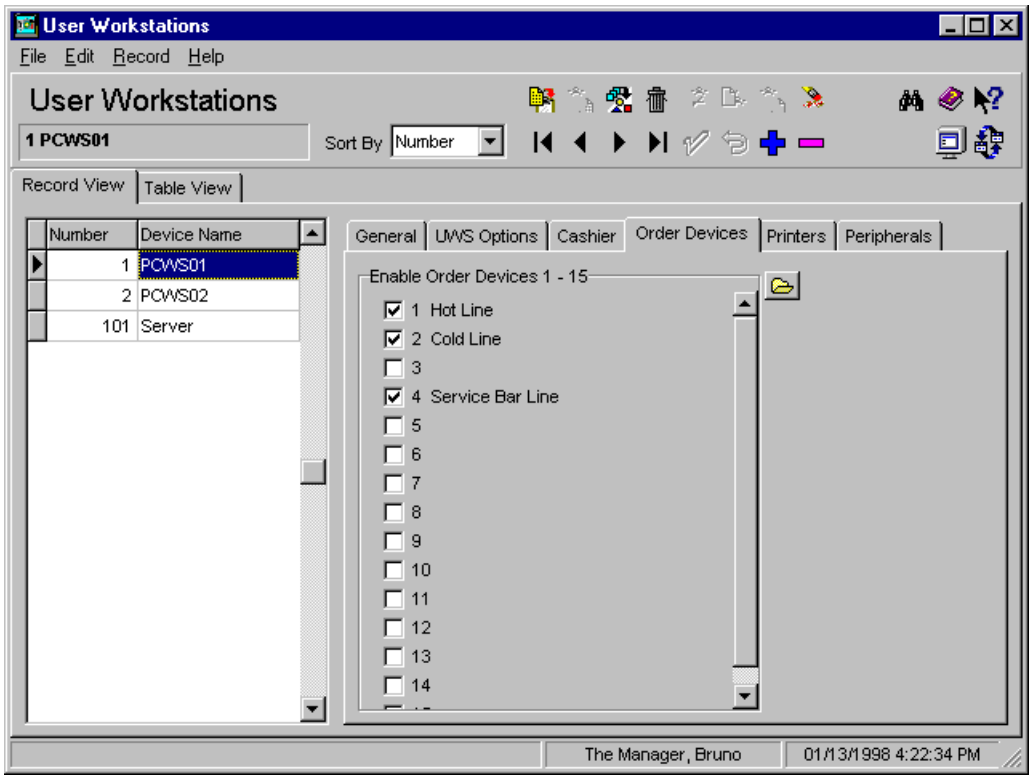
Select options to control cashier assignment when assigned by UWS (not employee).



Example
In the example above, this restaurant assigns a cashier link to each UWS. Cashier totals are used to balance by shift rather than by employee in this restaurant because the employee who begins the check is not the same employee who tenders the check. Cashiers may also be assigned in the Employees form in which case this tab is used only to assign the number of cash drawers.

Order Devices

Enable the order devices associated with this UWS.

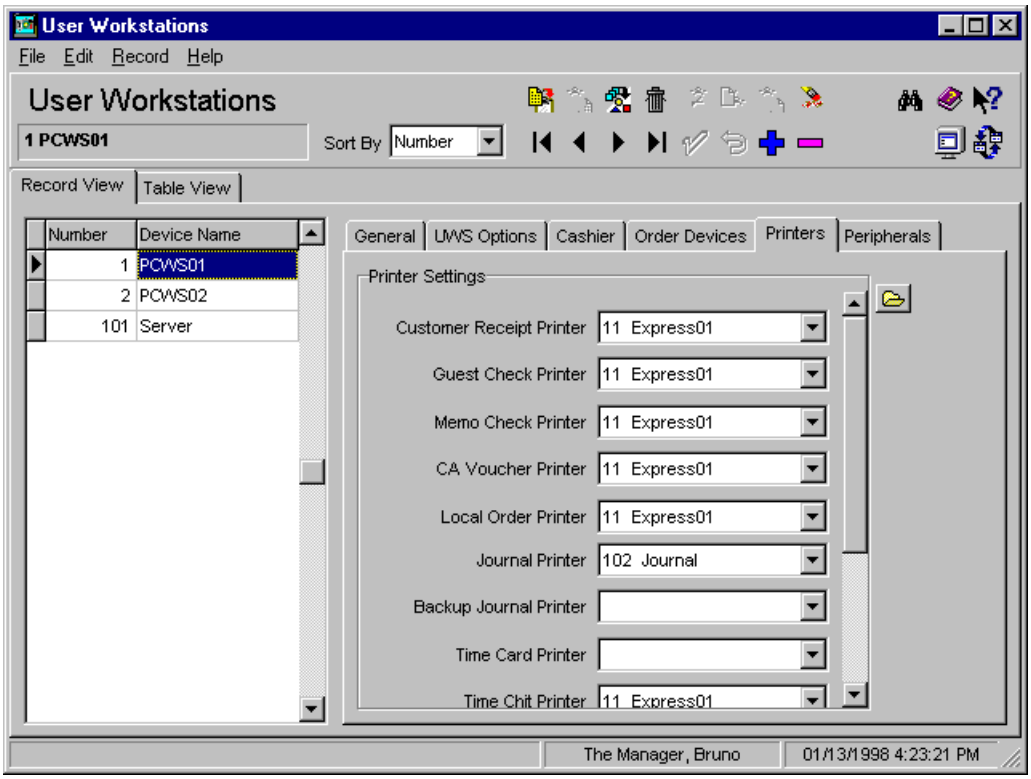


Example

The order devices you enable at each UWS can mask the printing of specific menu items or discounts. For example, CARROT CAKE is programmed in Menu Items to print at the Cold Line printer. The PCWS01 in the dining room has the Cold Line printer enabled. When CARROT CAKE is ordered at the PCWS01 the order prints at the Cold Line printer in the kitchen. However, the PCWS in the carryout does not have the Cold Line printer enabled. When carrot cake is ordered, the carryout employee sells the cake from the display case.

Printers

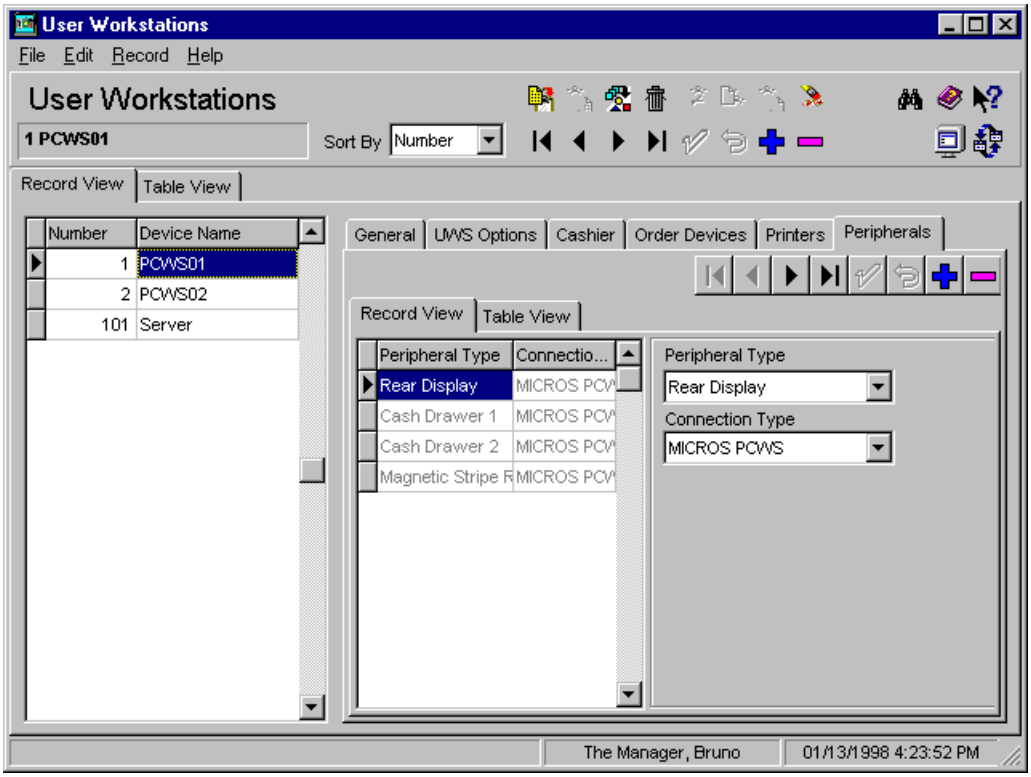
Select the printers that will service each UWS.



Example
In this restaurant, customer receipts from the PCWS01 are programmed to print at the Express printer located nearby.

Peripherals

Select the peripherals that will service each UWS.



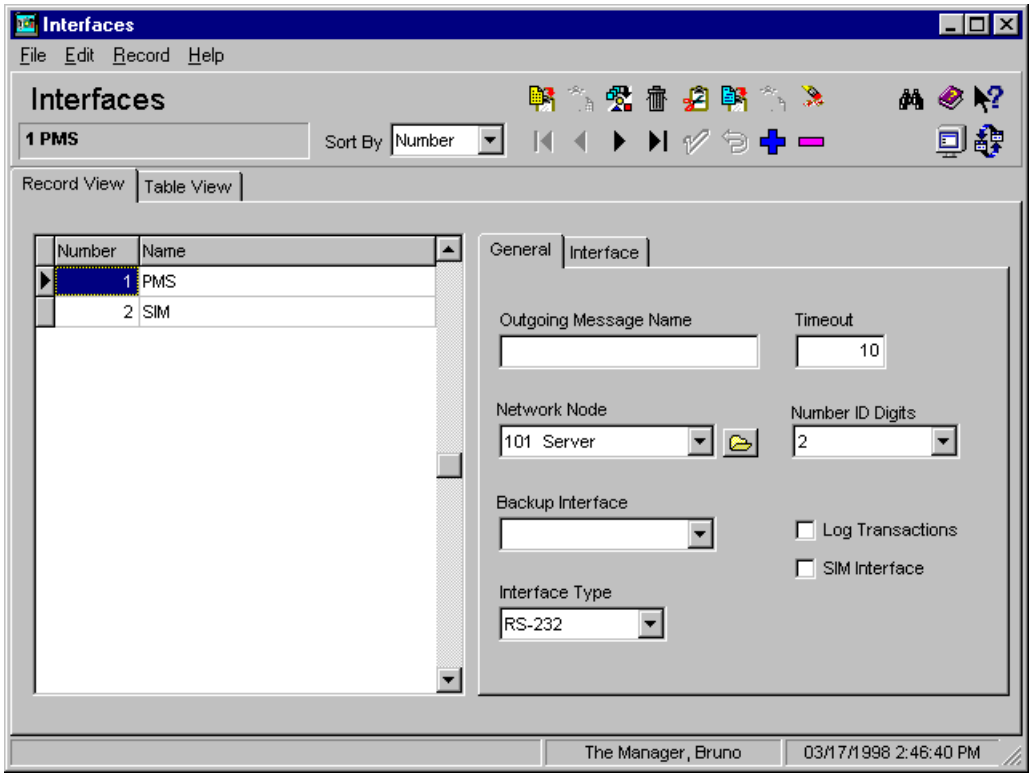
Interfaces

Use the Interface folder to identify the PMS (Property Management System), SIM (System Interface Module), or any other Interface System and there configuration.

Programming

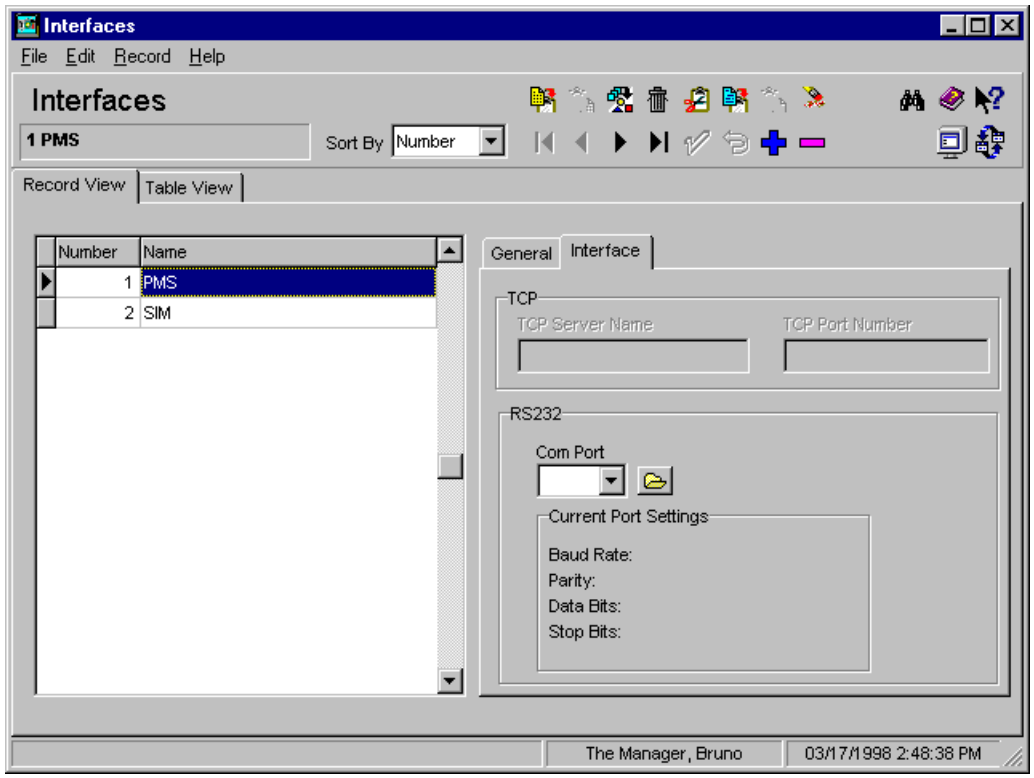
General

Create a record for different Interface System(s) this restaurant will use.



Interface

Configuration the communications parameters.



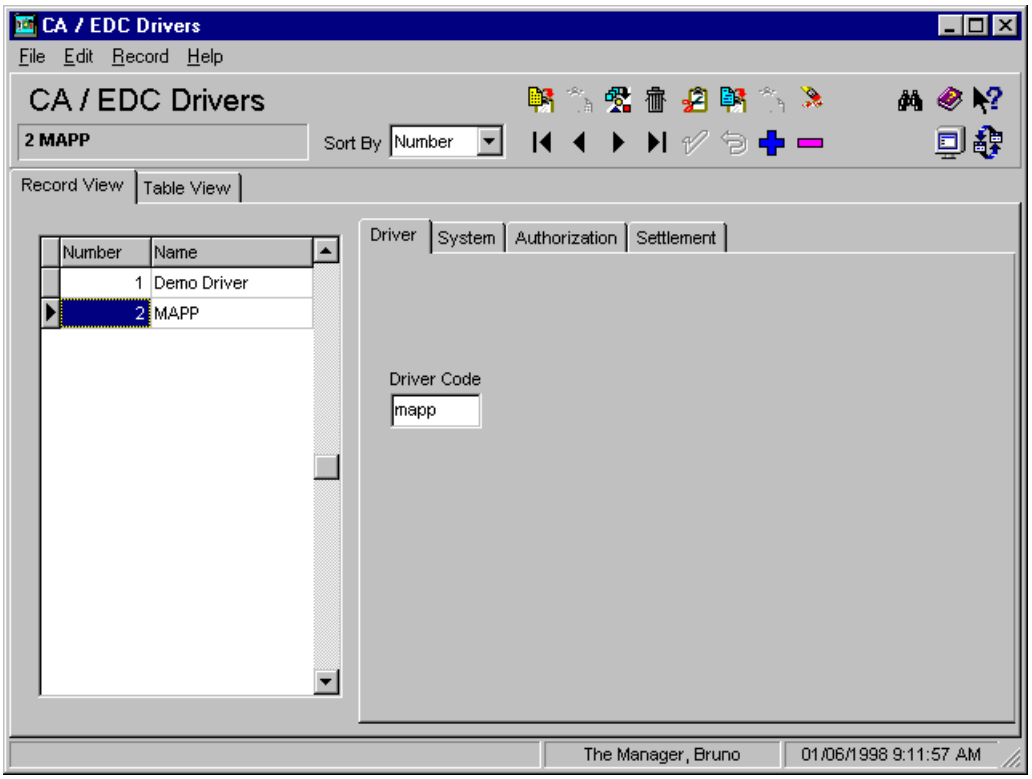
CA/EDC Drivers

List and configure the credit card driver(s) this restaurant will use for authorization and settlement of credit card transactions. The driver activation code you enter determines the fields that will be active in the other tabs.

Programming

Driver

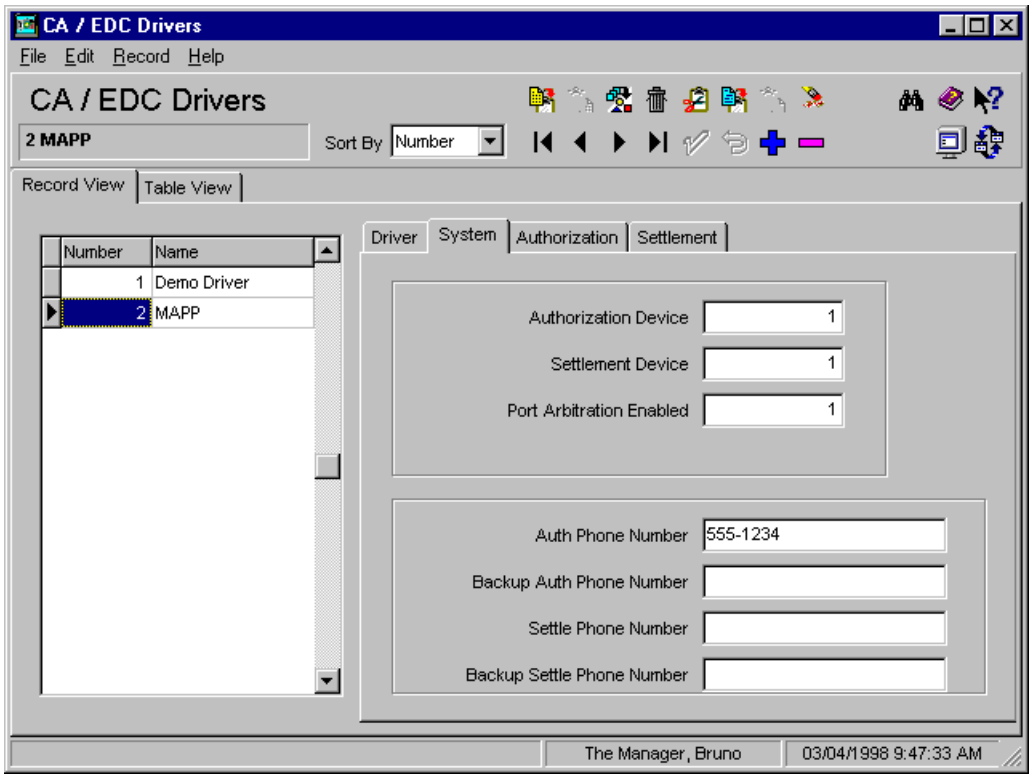
Enter the name and Driver Activation Code for each driver this restaurant requires. You must save the Driver Code before configuring the other tabs in this form.



Example
This restaurant uses the MAPP driver for authorization and settlement of credit card transactions.

System

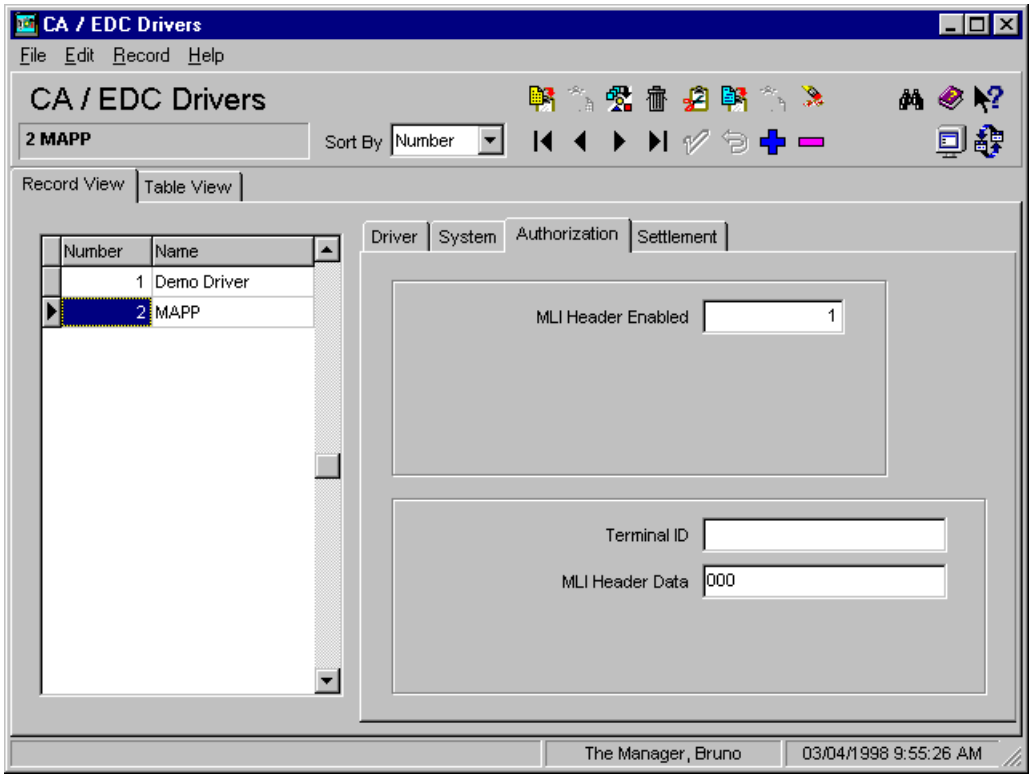
Complete the active fields. The fields in this form do not become active until you save the Driver Activation Code in the Driver tab.



Example
This restaurant uses the modem listed in the system properties folder for authorization and settlement. The number one is entered to indicate that the first modem listed should be used.

Authorization

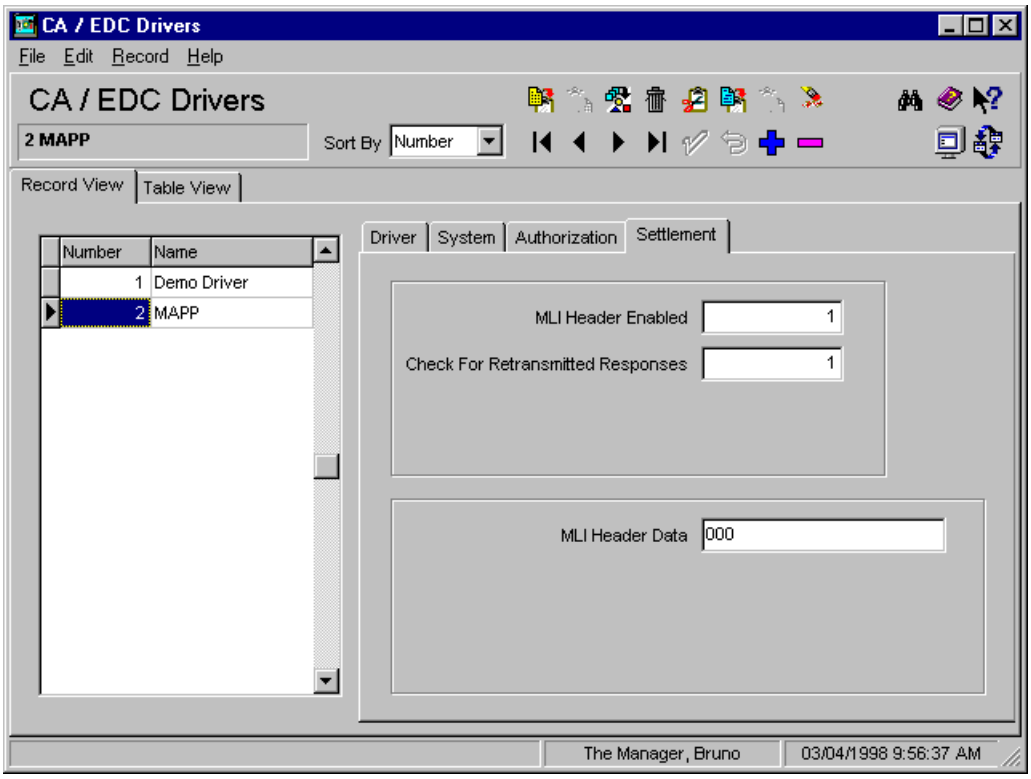
Complete the active fields. The fields in this form do not become active until you save the Driver Activation Code in the Driver tab.



Example
To enable the MLI Header for the MAPP Driver, this restaurant enters a 1 in the MLI Header field.

Settlement

Complete the active fields. The fields in this form do not become active until you save the Driver Activation Code in the Driver tab.



Example
To enable the MLI Header for the MAPP Driver, this restaurant enters a 1 in the MLI Header field.

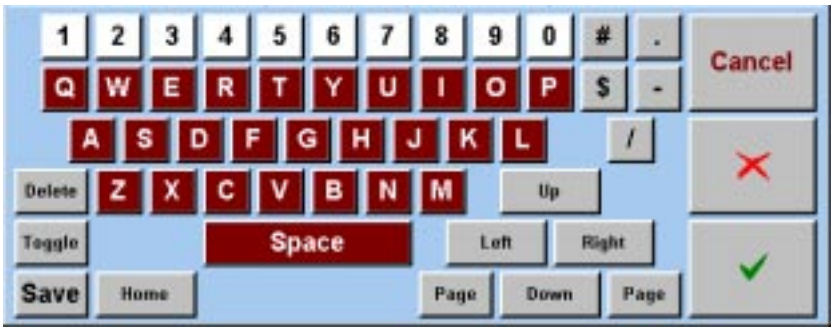
Touchscreens

Use the touchscreens form to enter a list of touchscreens and create styles for generated keys.

Methods
You can create touchscreens by:

- ❏ Using the touchscreens provided with the sample database.
- ❏ Editing sample touchscreens to suit the restaurant's needs.
- ❏ Creating new touchscreens.

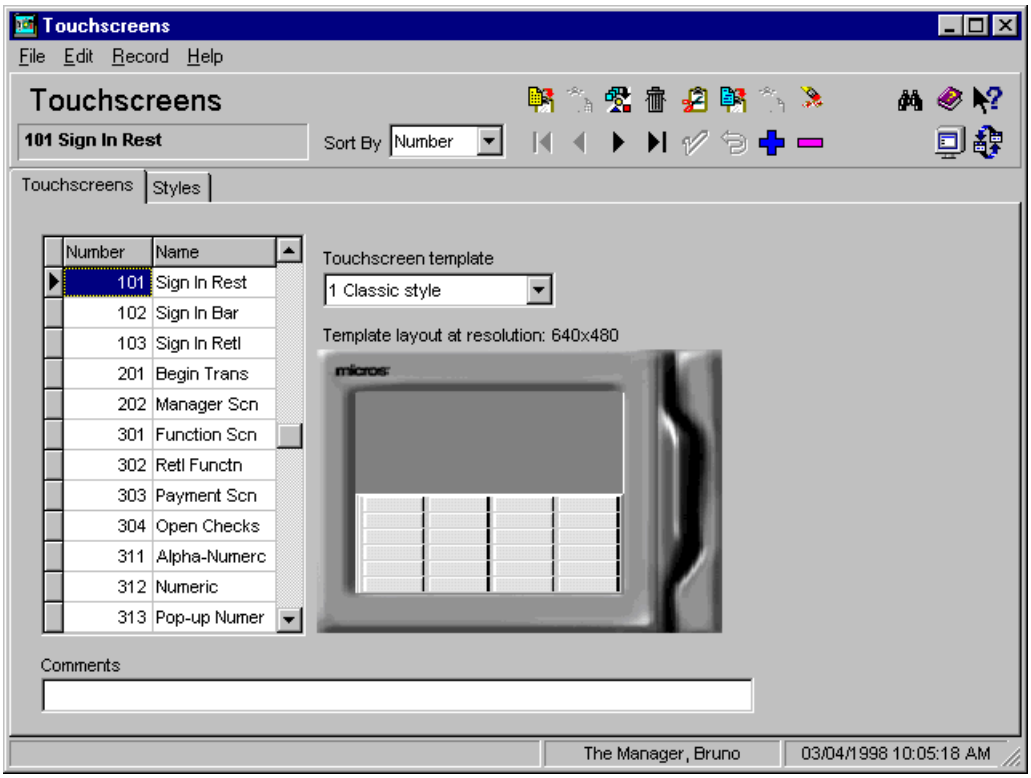
The example below shows some sample touchscreens.

Default Sign-In	
Default Transaction	
Default Alpha Entry	

Programming

Touchscreens

Enter a name for each touchscreen and template required by this restaurant.

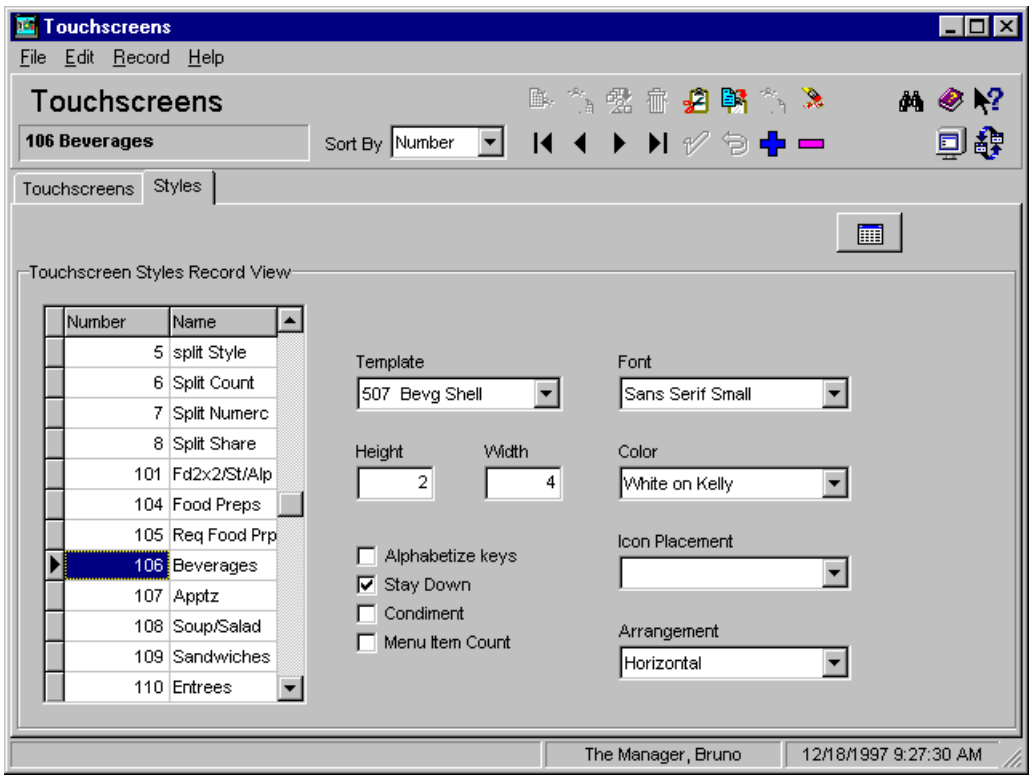


Example

This restaurant uses different sign in screens for the Bar and Restaurant. The Bar sign in screen contains two one-touch sign in keys to allow bartenders to sign in quickly.

Styles

Create the styles for displaying generated keys and assign each style to a template.



Example
The style created by the settings above displays on the Bevg Shell template.

These keys are generated based on the style.

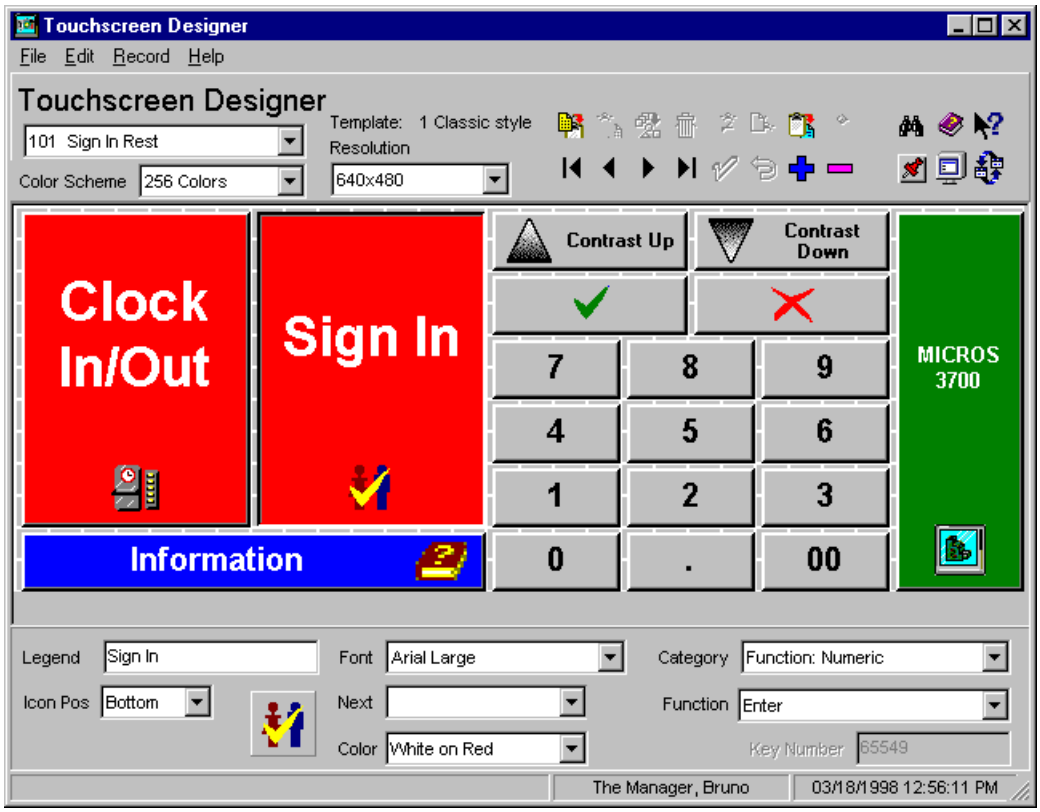
These are user-defined keys created in Touchscreen Designer on the Food Shell template.

Touchscreen Designer

Use the Touchscreen Designer form to create new touchscreens and edit samples for this restaurant's use.

Programming

Create a layout for each touchscreen listed. Use the fields below the design area to define each key's characteristics. For more information on using Touchscreen Designer, see "Using Touchscreen Designer" on page 3-28.



Example
The entries in the fields above create the following key:

Chapter 5

System

The forms in the System folder help you enter information about the name, local currency, table arrangement, and serving periods for a restaurant.

In this chapter

Overview 5-2
Restaurant 5-3
Order Types 5-6
Information Screens 5-7
Reasons 5-9
Periods 5-11
Serving Periods 5-12
Time Periods 5-13
Macros 5-14
External Programs 5-15
Licensing 5-16

Overview

Use the forms in the System folder to enter information that applies to the entire system or restaurant. Complete the forms in the following order:

1. Restaurant
2. Order Types
3. Information Screens
4. Reasons
5. Periods
6. Time Periods
7. Macros (Optional)
8. External Programs (Optional)
9. Licensing

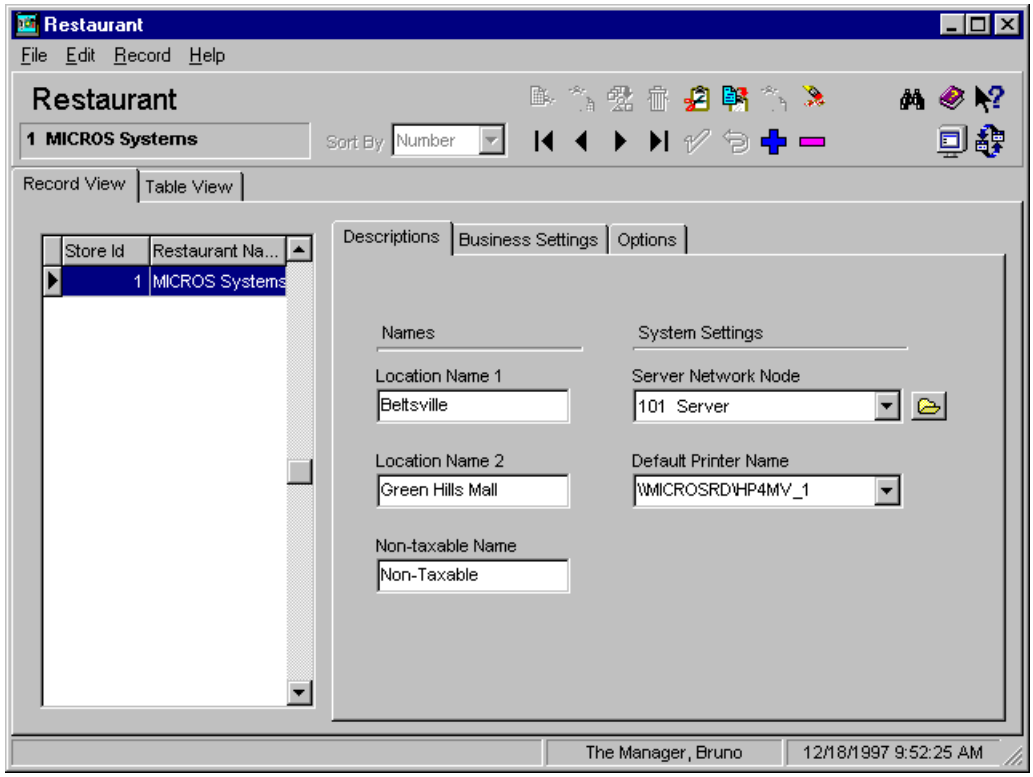
Restaurant

In the Restaurant form, enter information such as, the name(s) that apply to this restaurant, information about operational days and hours, base currency, and the taxes that apply to this location.

Programming

Descriptions

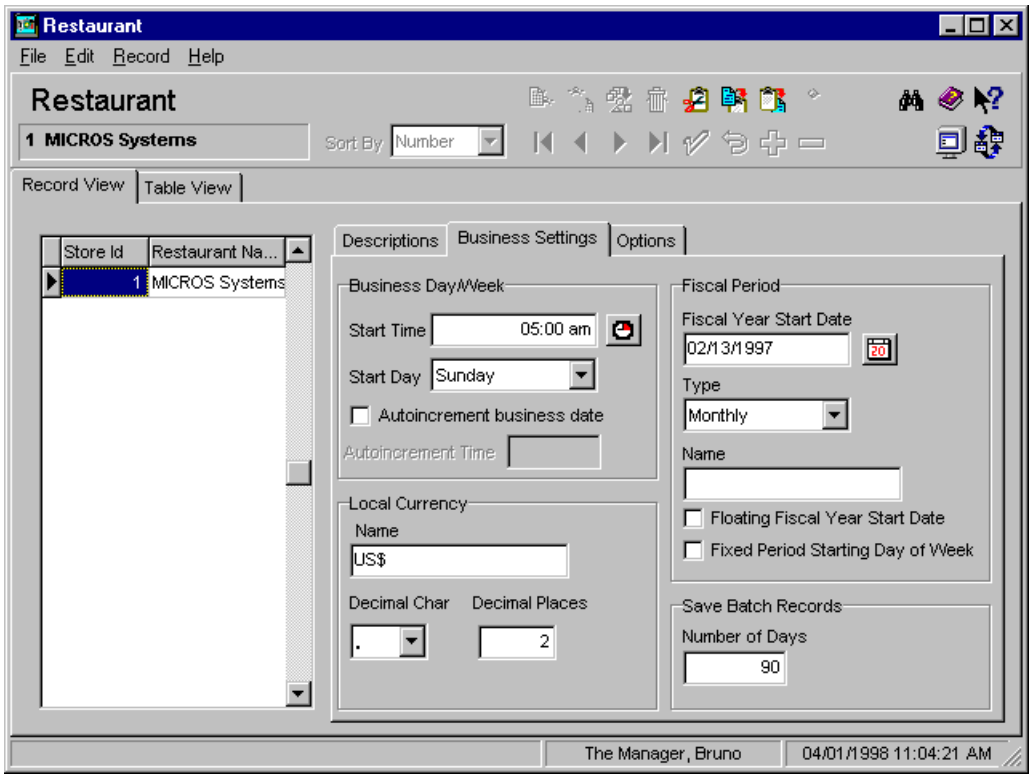
Enter the descriptions that apply to this restaurant.



Example
This restaurant is located in a shopping mall and is also known by it's mall location. The mall name is entered as a secondary name.

Business Settings

Establish the business settings for this restaurant.

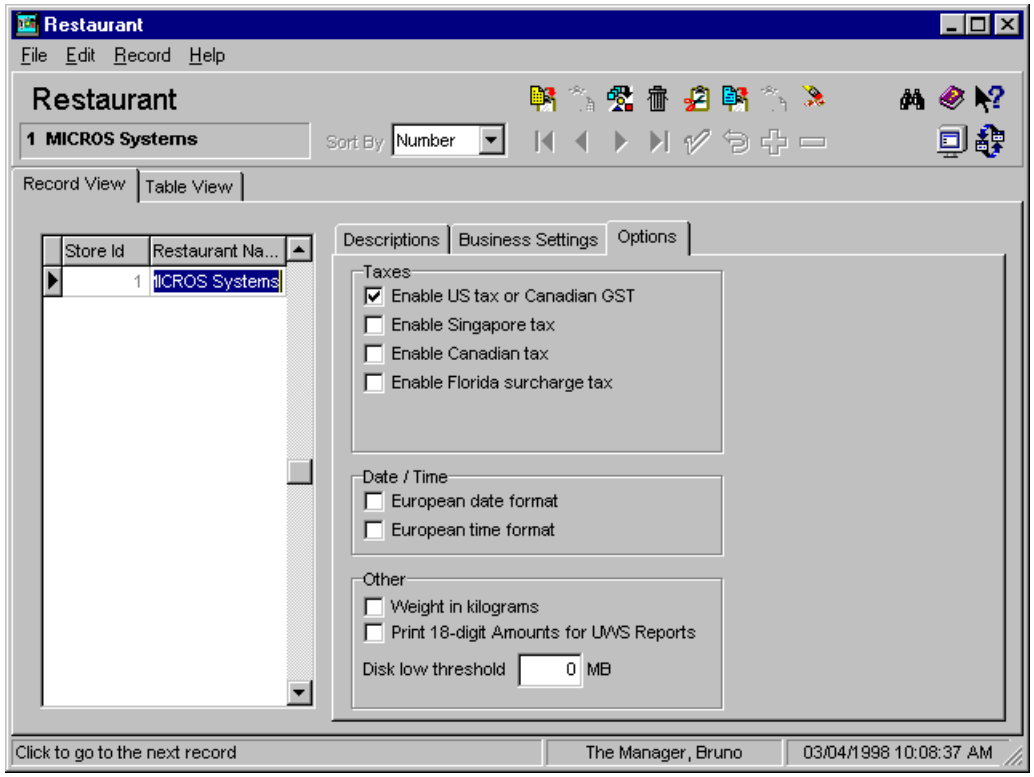


Example

The *Business Day Start Time* and *Business Week Start Day* fields establish a starting point for totals reporting that occurs daily and/or weekly. For example, if a restaurant wants weekly sales and labor reports to start at 6:00 a.m. on Monday, select 6:00 a.m. in *Business Day Start Time* and Monday in *Business Week Start Day*. (Click the clock button to select a.m. or p.m.)

Options

Select the options that apply to this restaurant.



Example
A restaurant located in Canada uses European date and time formats. The date appears as: 09SEPT96 when programmed to print on customer receipts, guest checks, and reports.

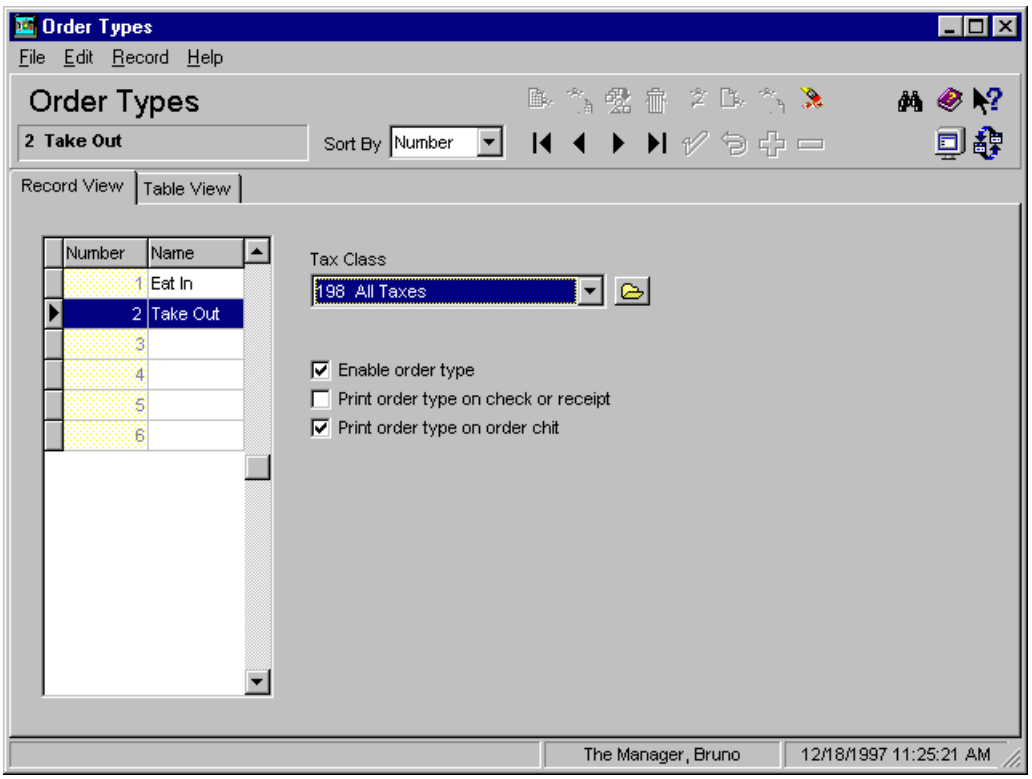
Order Types

At least one order type must be defined and enabled for every restaurant.

Names
Order type names can be up to eight characters. The name appears on balance reports, in the subtotal line during transactions, and can be programmed to print on guest checks and order receipts. It is not necessary to assign a name to an order type unless you want the name to display and print.

Programming

Create the order types required by this restaurant. Use the folder link to go to Sales | Tax Classes and create the tax classes required by this restaurant



Example
This restaurant sells food for take out. A key is programmed on the touchscreen for this order type. The option *Print order type on order chit* is selected. When the key is used, the kitchen knows to wrap the order for take out.

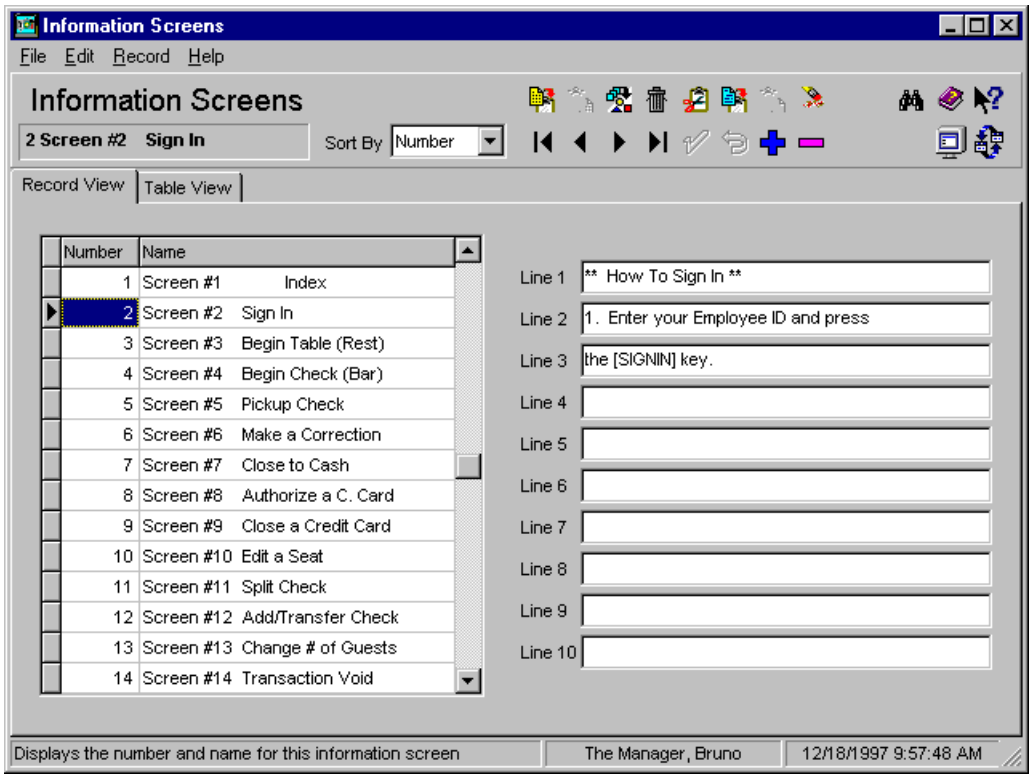
Information Screens

The 3700 system allows you to design information screens that are unique to each restaurant. These screens are accessed through a touchscreen key and include information such as directions to the restaurant or group rates.

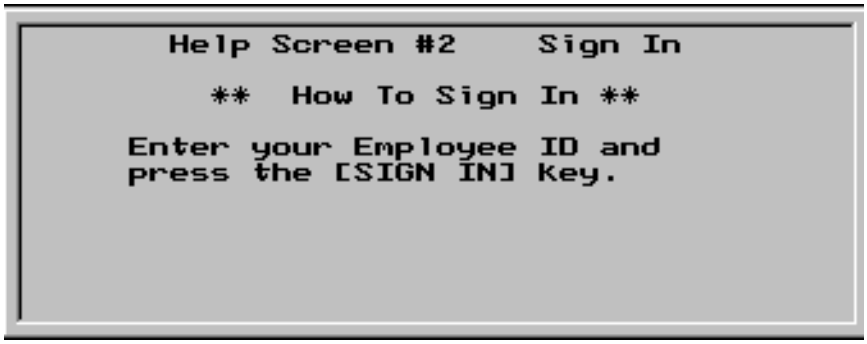
The first screen in the Information Screens form displays when the [Info] key is pressed. It is often used as an index to list the name and number of the screens in the system. Employees can access subsequent screens by pressing the [Info] key repeatedly, or by typing the number of the screen they wish to view and pressing [Info]. Pressing [Clear] clears the display.

Programming

Create the information screens required by this restaurant. Use spaces to center the information. The name of the screen displays.



Example
Here is how Information Screen #2 will look.



Reasons

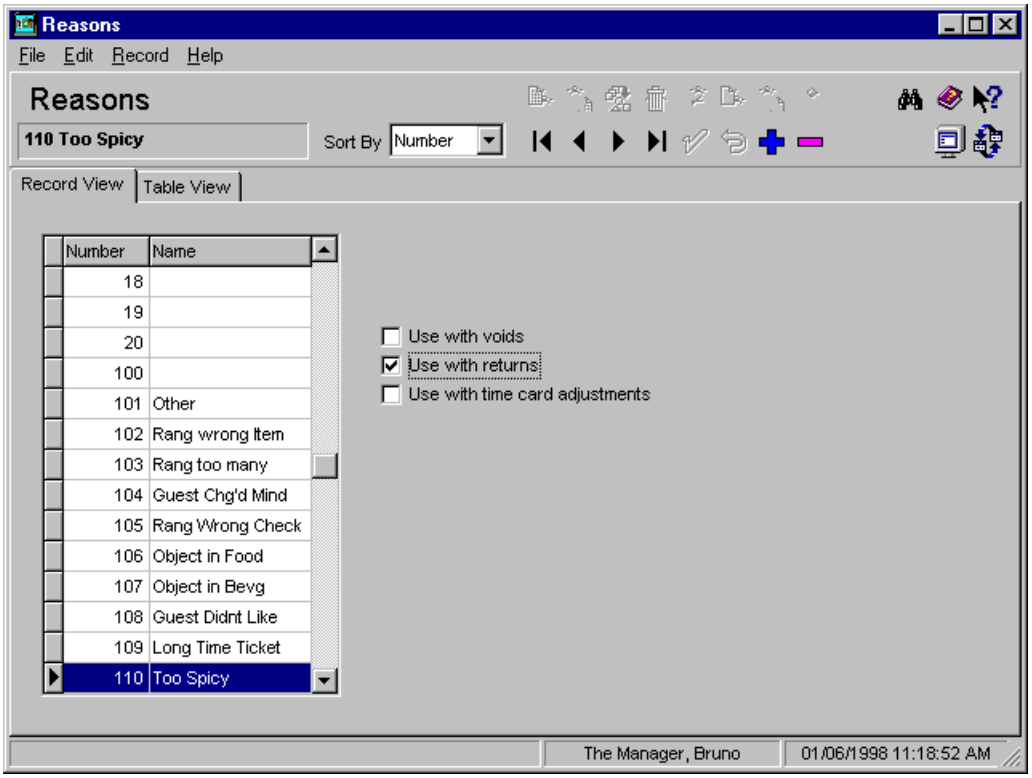
The 3700 sample database comes with a default set of reasons for use with voids, returns, and time card adjustments. Some common adjustment reasons are listed in the table below.

Time Card Adjustment Reasons	
On Time	Early From Break
Early	Late From Break
Late	Not Scheduled
on Break	Mgr Clock Out
On Paid Break	No Schedule
Void/Return Adjustment Reasons	
Other	Object in Food
Rang wrong item	Object in Bev
Rang too many	Guest Didn't Like
Guest Chg'd Mind	Long Ticket Time
Rang Wrong Check	

You can also create custom reasons for a restaurant.

Programming

Enter the reasons this restaurant requires and select when the reason should display.



Example

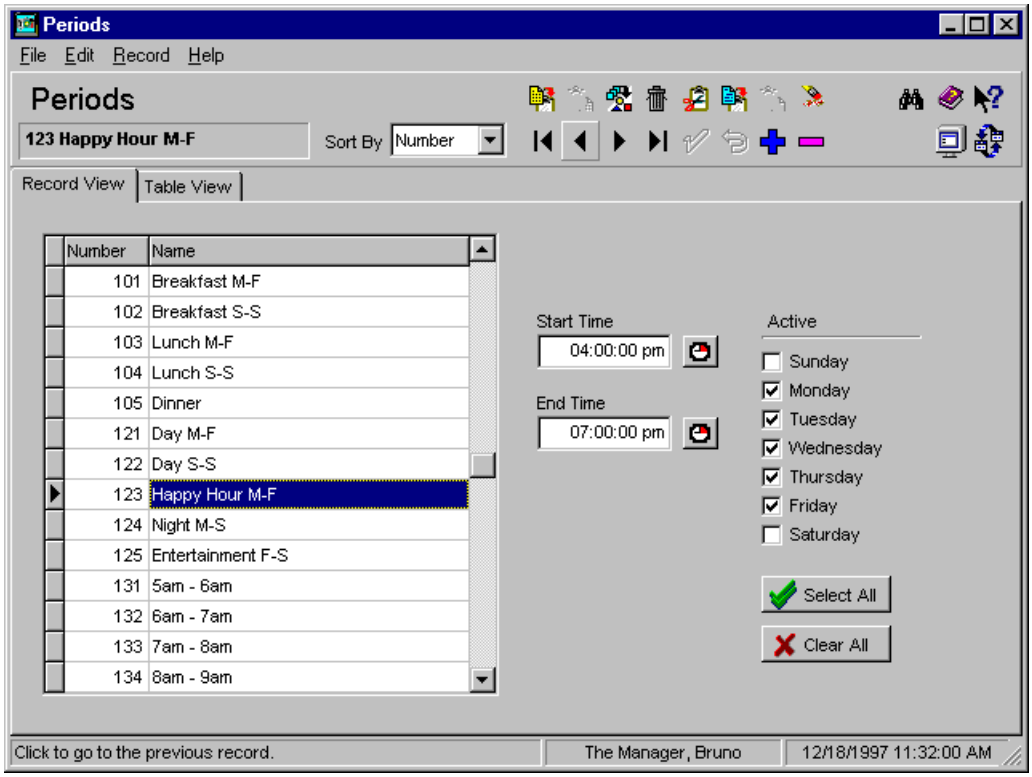
A restaurant that specializes in spicy dishes wants to track how many orders are returned because they are too spicy. The example above shows a new reason called “Too Spicy.” It will display as an adjustment reason whenever an item is returned.

Periods

Use the Periods form to create a set of periods for the restaurant. These periods serve as the basis for reports and automatic menu level changes.

Programming

Create the periods this restaurant requires.



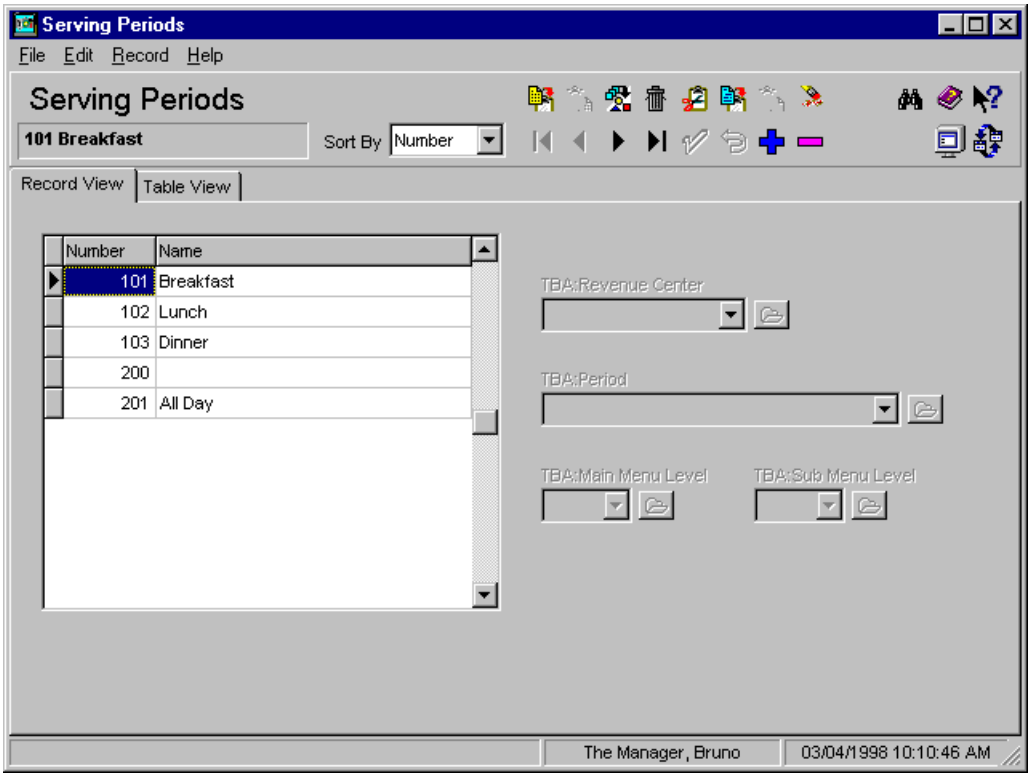
Example
A period is created for a daily Happy Hour which begins at 4:00 pm and ends at 7:00 pm M-F. This period can be used as a basis for reporting and automatic menu level changes. Menu Levels are programmed to change automatically by linking to this period in the Menu Levels form.

Serving Periods

Serving Periods are use to track sales for a given period of time.

Programming

Create the Serving Periods required by this restaurant

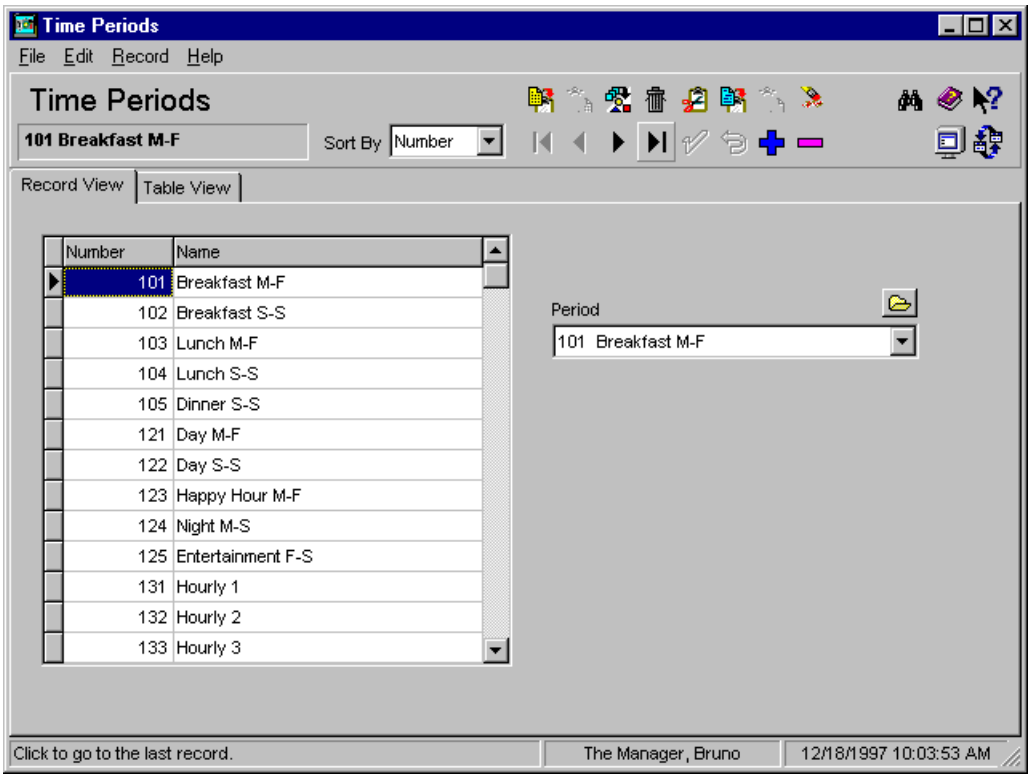


Time Periods

Periods are used to analyze the sales activity during certain times of the day or shifts in small (to the minute) or large (up to 24 hours) increments. 3700 system report templates can generate reports for time periods for a revenue center or for the entire system.

Programming

Create the Time Periods required by this restaurant.



Example
This restaurant wants totals for different serving periods as well as hourly. Time periods are created that reflect both of these reporting requirements.

Macros

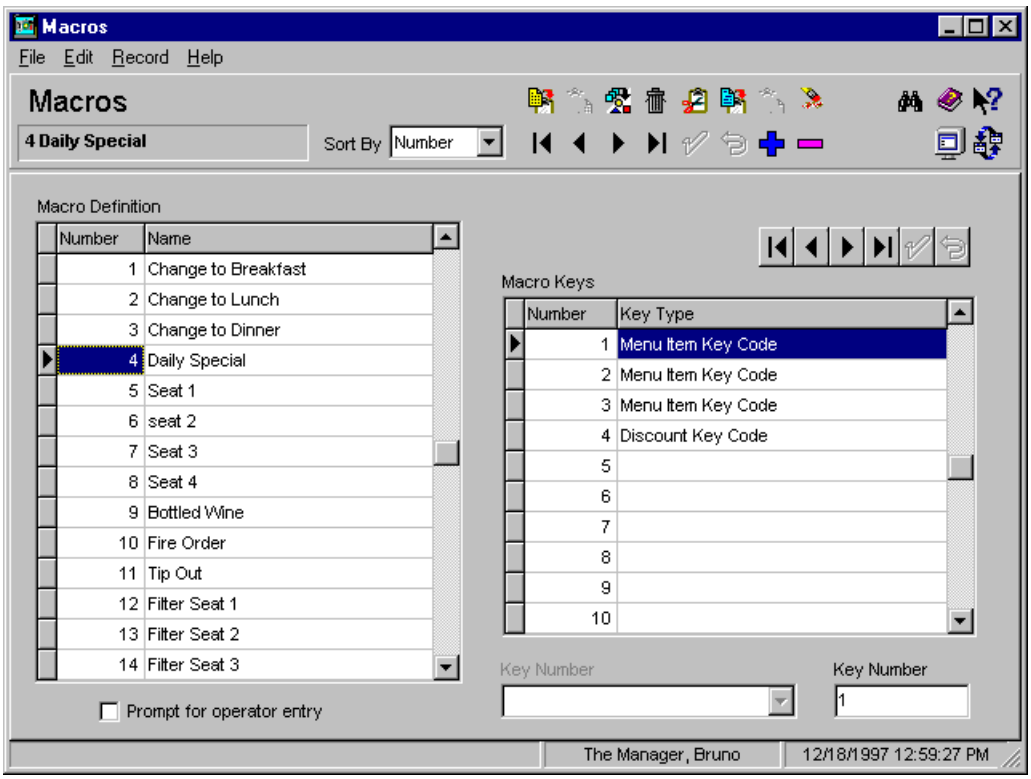
Use the Macros form to create collections of keystrokes.

Develop a macro for each task that requires a sequence of keystrokes by an employee. A macro may include any key or may be linked to another macro. When macros are chained together they execute in succession. There is no limit to the number of macros that can be linked together.

If a macro is being linked to another, include the key code for that macro as the last step in the macro. The macro will ignore any steps that follow the Macro key code.

Programming

Create the macros required by this restaurant.



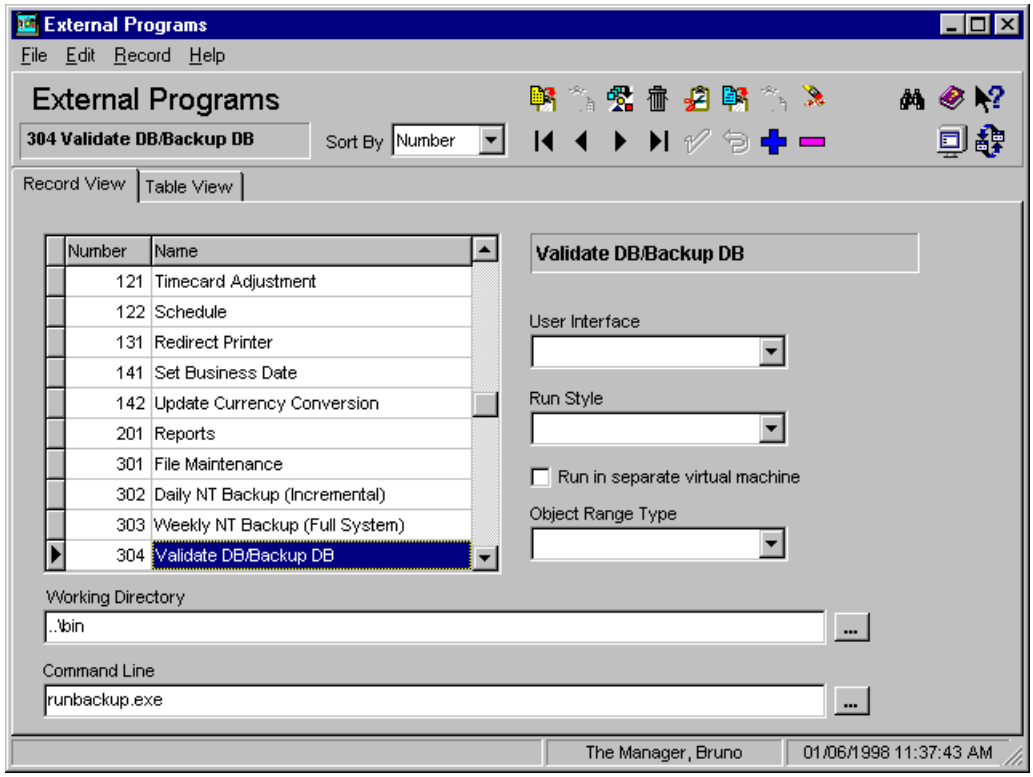
Example
This restaurant offers a “Daily Special” featuring soup, salad, coffee, and a discount. The Daily Special macro posts the entire Daily Special with a single keystroke. The [Macro] key makes ordering the daily special fast, convenient, and error free. It also provides the sales tracking data that would not be available if the “Daily Special” were programmed as a single menu item.

External Programs

Use this form to enter any external programs this restaurant will use in conjunction with the 3700 system.

Programming

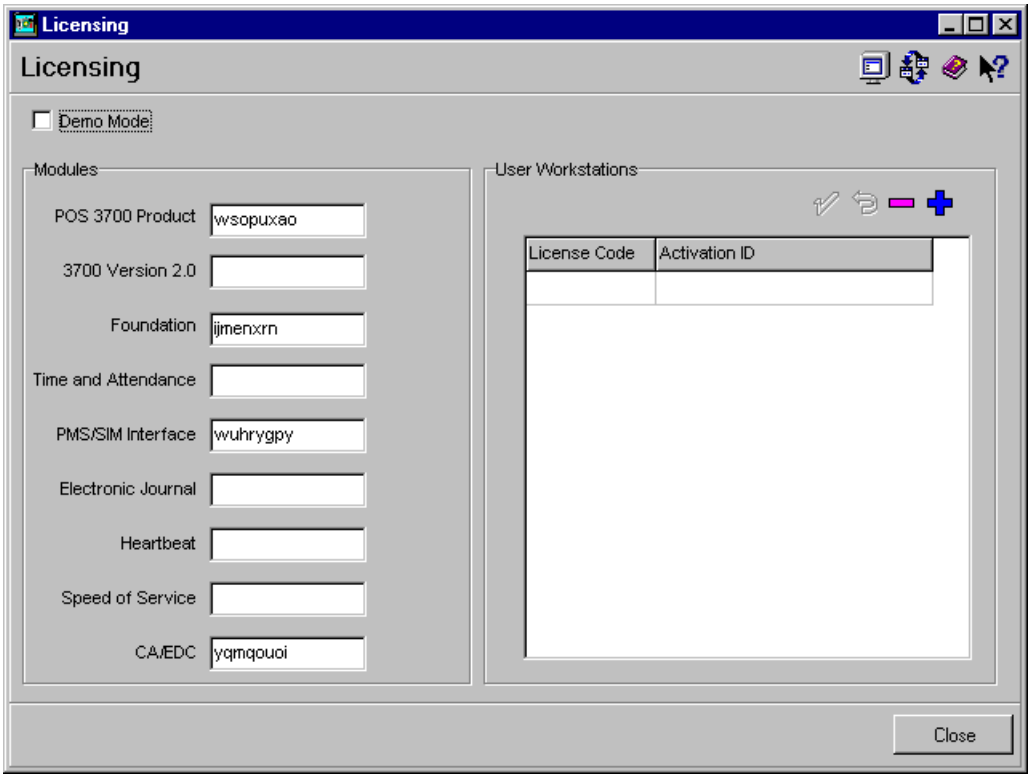
Enter information about each external program this restaurant uses.



Example
This restaurant Validates and Backs up the database using an external program.

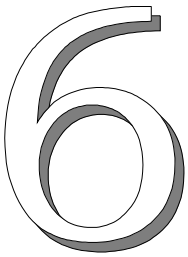
Licensing

This form includes the 3700 system software key licensing codes.



Example
This restaurant Validates and Backs up the database using an external program.

Chapter



Sales

The Sales folder contains information about the types of food and beverages a restaurant serves. Not only do you enter the names and prices of menu items here, but you also determine what condiments will be available with each menu item, the types of tender/media accepted, and the discounts and taxes that apply to sales.

In this chapter

Overview 6-2
Tax Rates 6-3
Tax Classes 6-7
Print Classes 6-8
Menu Levels 6-10
Discount/Service 6-13
Tender/Media 6-16
Currency 6-26
Courses 6-27
Descriptors 6-31
Condiments 6-36
Menu Item Classes 6-39
Menu Items 6-43

Overview

Use the forms in the Sales folder to enter information about the items this restaurant sells and the taxes, discounts and service charges that apply. Program the forms in the Sales folder in the following order:

1. Tax Rates
2. Tax Classes
3. Print Classes
4. Menu Levels
5. Discount / Service
6. Tender / Media
7. Currency
8. Courses
9. Descriptors
10. Menu Item Classes
11. Condiments
12. Menu Items

Tax Rates

Use the Tax Rates form to define the tax rates that apply to sales in a particular restaurant. Some localities charge a different tax on food and beverages. Create a tax rate for each tax this restaurant charges.

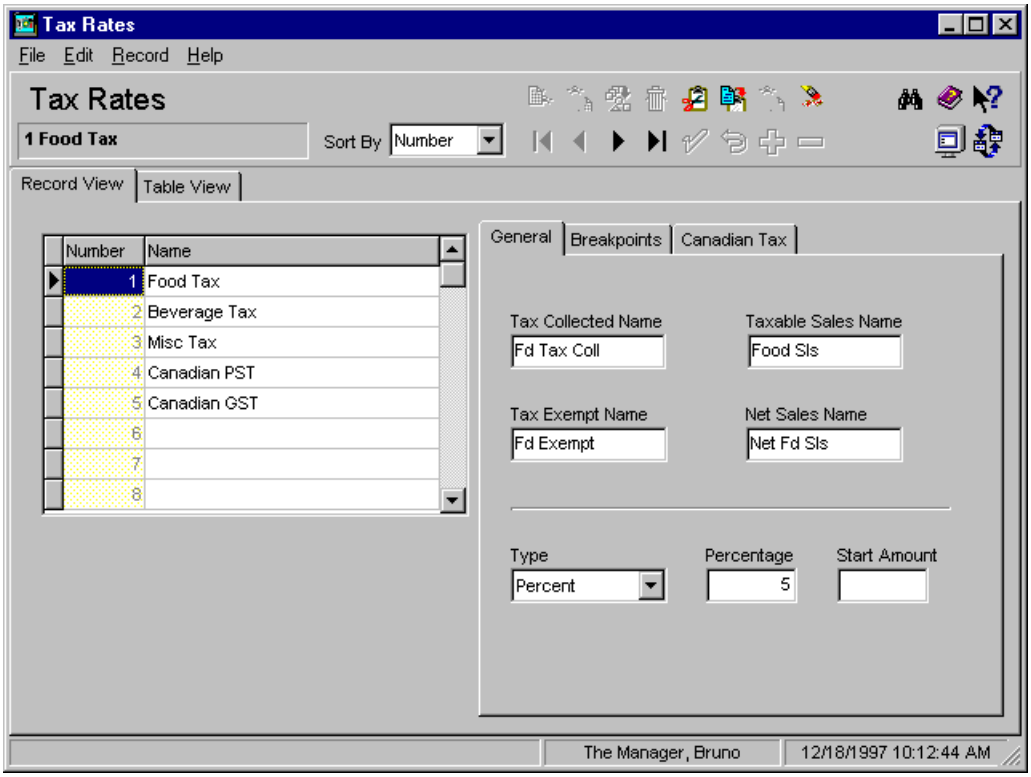
The restaurant's location determines the method for calculating taxes. The 3700 system allows you to program the following tax types:

Type	Definition	Example
Percent	The tax is calculated by multiplying the amount in the percentage field by the total.	$5.00 x 5% = .25 Tax
Breakpoint	The tax is calculated based on a chart provided by the local government. To calculate tax this way, complete the Breakpoints tab.	From chart: $4.75 -$5.00 = .24 Tax
Inclusive	The tax is calculated by taking a percentage of the price and posting it as tax.	Subtract tax from total: $5.00= $4.75 to Sales.25 to Tax.

Programming

General

Create a tax rate for each tax this restaurant requires.

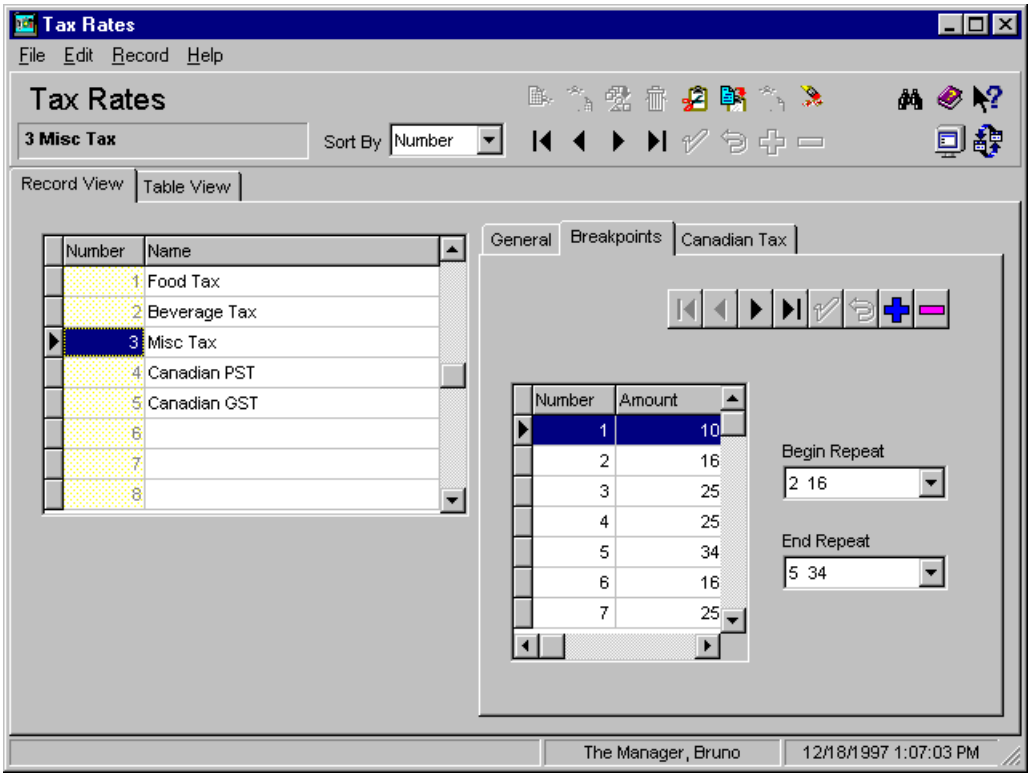


Example
This restaurant collects a 5% tax on food. They call the tax "Food Tax." This name will print on customer receipts and reports.

Breakpoints

Complete the Breakpoints tab if Breakpoint is selected in the *Type* field on the General tab.

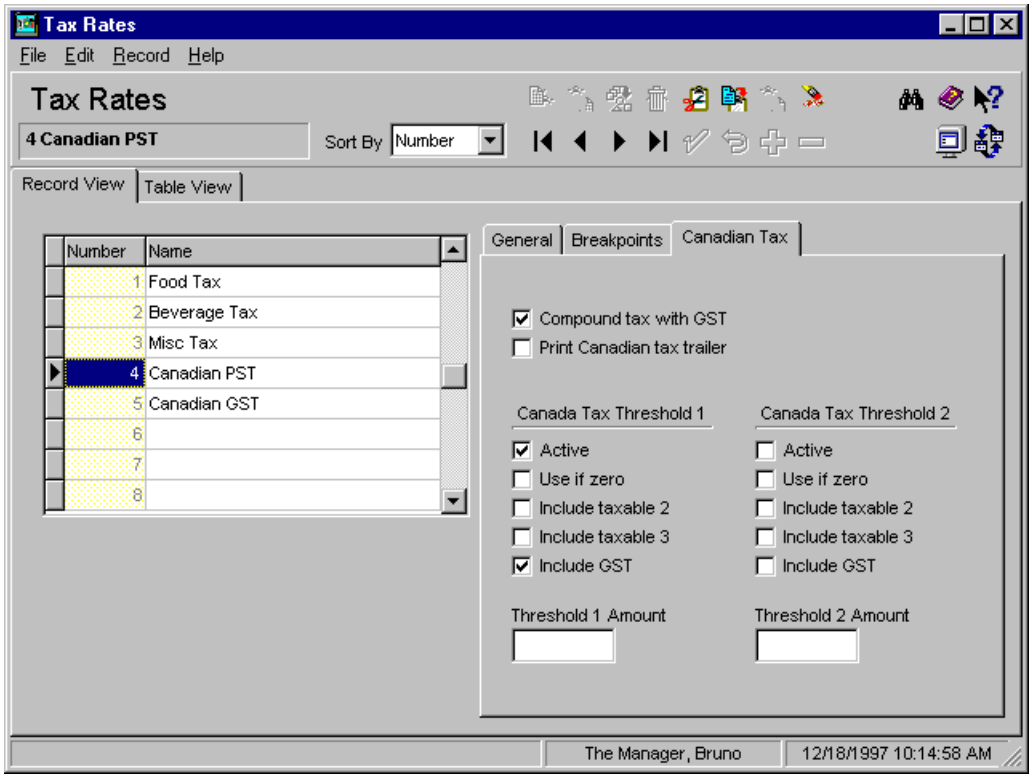
- ❑ Using the breakpoint tax tables provided by the local government, calculate the difference between the first and second amounts in the From Amount column.
- ❑ Enter the result in the Amount column of the Breakpoints table. Do not enter a decimal point.
- ❑ Repeat these steps until a pattern emerges.
- ❑ Select the Number of the breakpoint that begins the pattern in *Begin Repeat*.
- ❑ Select the Number of the breakpoint that ends the pattern in *End Repeat*.



Example
This restaurant uses breakpoint taxes. The example above shows a repeating pattern that begins with 16 and ends with 34.

Canadian Tax

Complete the Canadian Tax form for Canadian Tax rates.

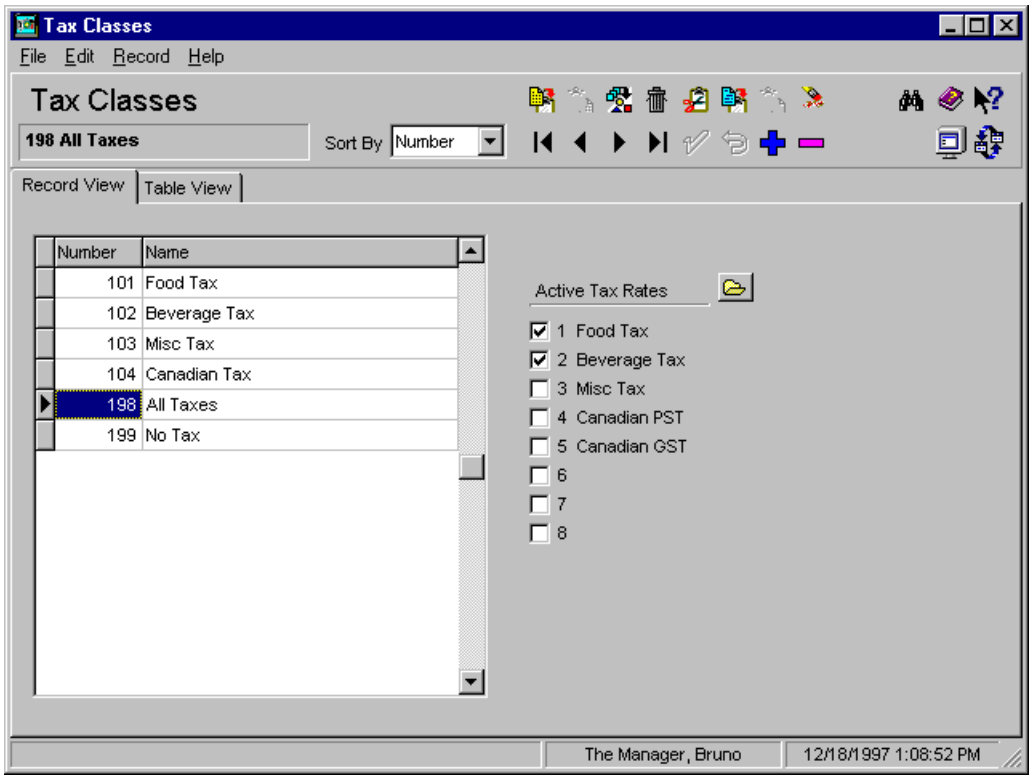


Tax Classes

Once you've created the tax rates a restaurant will use, you can group them into tax classes. Tax classes are applied in the Menu Item Classes form and determine the taxes that apply to specific classes of food and beverages. For example, menu item classes that are food items might have a tax class called "Food Tax" applied, beverages might have "Beverage Tax" and condiments might have a tax class called "No Tax."

Programming

Create the tax classes this restaurant requires.



Example
This restaurant needs tax classes for applying food and beverage taxes separately and in combination. A tax class called "All Taxes" is created.

Print Classes

Use this form to create print classes to control how and where different types of menu items print. You can select from the following print locations for each print class you create:

Print on...

- ❏ Customer receipt
- ❏ Local order receipt
- ❏ Journal
- ❏ Report
- ❏ Guest Check

In addition you can select from the list of remote order devices you programmed in Devices | Order Devices to control where items in each print class print. It useful to remember that remote order devices can be “logical” devices. This means that two remote devices may actually print at the same physical device.

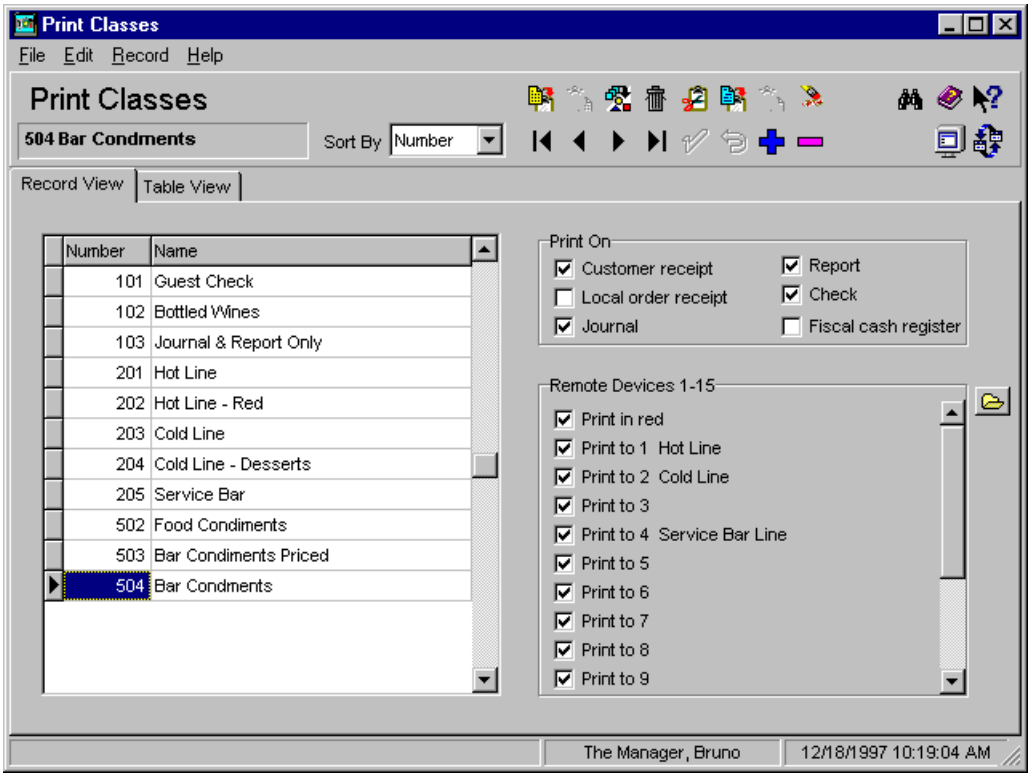
Selecting a Print Class

Select a print class to control where and how each menu item will print. For example, menu items such as entrees, appetizers, and drinks need to print on guest checks, journals and reports. Bottled wines might be programmed to print a local order receipt and food condiments may only print to the journal and reports. A Print Class can also be used to control the order in which items print. Within a Print Class items will sort and print in the order in which they are entered. Print Classes can also be used to:

- ❏ sort draft beer orders before bottle beer orders
- ❏ print high prep time foods before low prep time foods
- ❏ print certain types of menu items in red
- ❏ exclude condiments from customer receipts

Programming

Create the print classes required by this restaurant.



Example

This restaurant uses two print classes to control the printing of bar condiments. Priced bar condiments are programmed to print on the journal and reports. Unpriced condiments do not print to the journal or reports. They are only programmed to print in red on the customer receipt/check.

Menu Levels

Use this form to define a set of menu level classes to simplify menu item programming. Menu levels serve to "filter out" menu items that should not be available under certain conditions. Each menu item is linked to a menu level class in the Menu Items form. The menu levels you enable for each class determine:

- ❏ Which Main Menu levels will allow access to items in this class
- ❏ Which Sub-menu levels will allow access to items in this class
- ❏ Whether menu levels (Main and Sub) will remain active (Stay down) when items in this class are posted, and if not, to which menu levels will the system "pop-up"

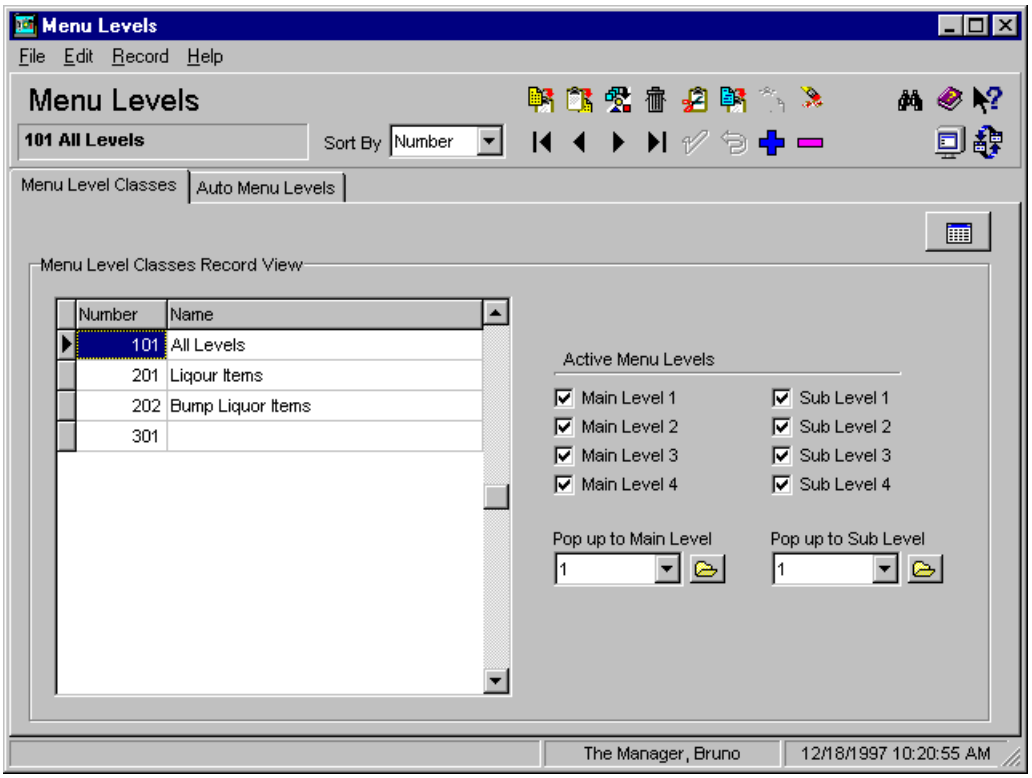
Automatic menu levels allow the 3700 system to change menu levels automatically to:

- ❏ Distinguish between menu items ordered in different meal periods (such as Breakfast, Lunch, And Dinner)
- ❏ Identify menu items available on different menus (such as Regular, Happy Hour, Late Night)
- ❏ Specify different sizes of menu items (such as Small, Medium, Large)
- ❏ Perform a combination of the above functions. For example, the Main menu levels Breakfast, Lunch, and Dinner could be reserved for period filtering, while Sub-menu levels Small, Medium, and Large determine price filtering.

Programming

Menu Level Classes

Create the menu level classes required by this restaurant.

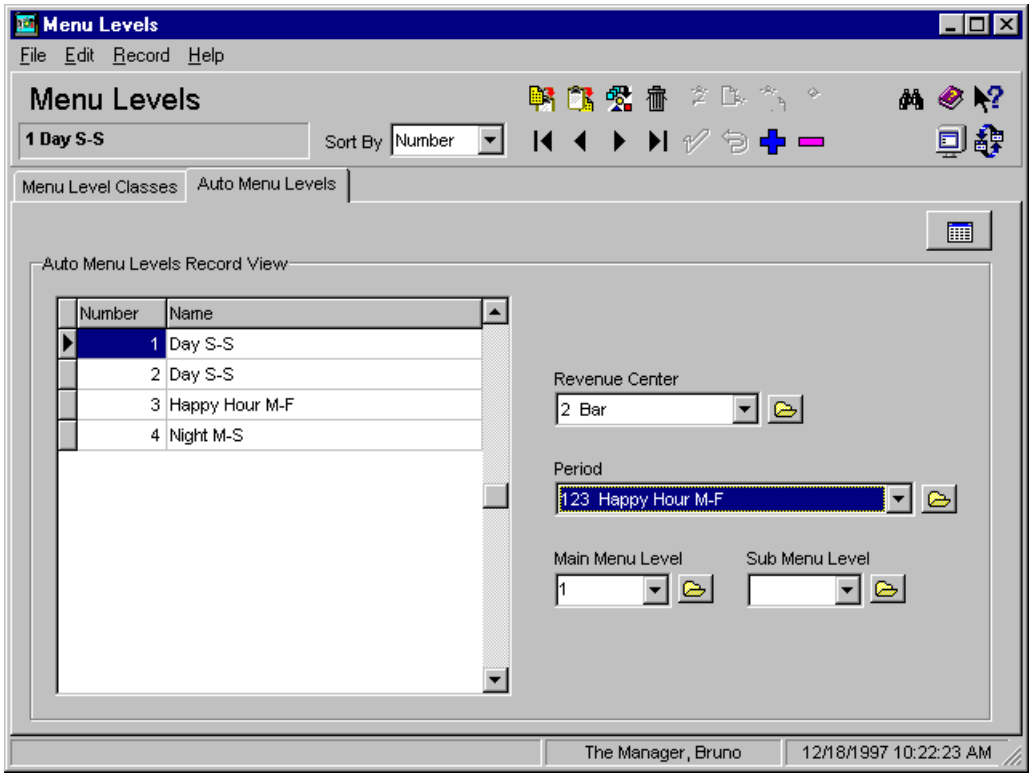


Example (Main)
This restaurant offers a Bagel w/ Crm Cheese during Breakfast, Lunch, and Dinner. By assigning Bagel w/Crm Cheese to the Menu Level Class “All Levels”, the bagel is available at all times of the day. The price of the bagel defaults to the breakfast (Price1) price. At other times of the day, when a bagel is ordered, the employee is required to change the menu level to charge a higher price.

Example (Sub)
This restaurant serves soup in cups and bowls and charges a higher price for the bowl. The Menu Level Class “Lunch and Dinner” has sub menu levels 1 and 2 enabled. This allows the restaurant to offer a cup and a bowl of soup at two different prices. During Dinner, the sub menu level pops-up to 2, the bowl price. To order a cup of Clam Chowder, the employee must press a [Change Menu Level] key.

Automatic Menu Levels

Create a record for each automatic menu level change this restaurant requires.



Example
In this restaurant, the menu level automatically changes to Main Level 2 for Happy Hour in the Bar. Menu items with a Price2 value, automatically change to this price during the Happy hour period.

Note

The menu item must belong to a Menu Item Class with the option Enable prices 2-4 selected.

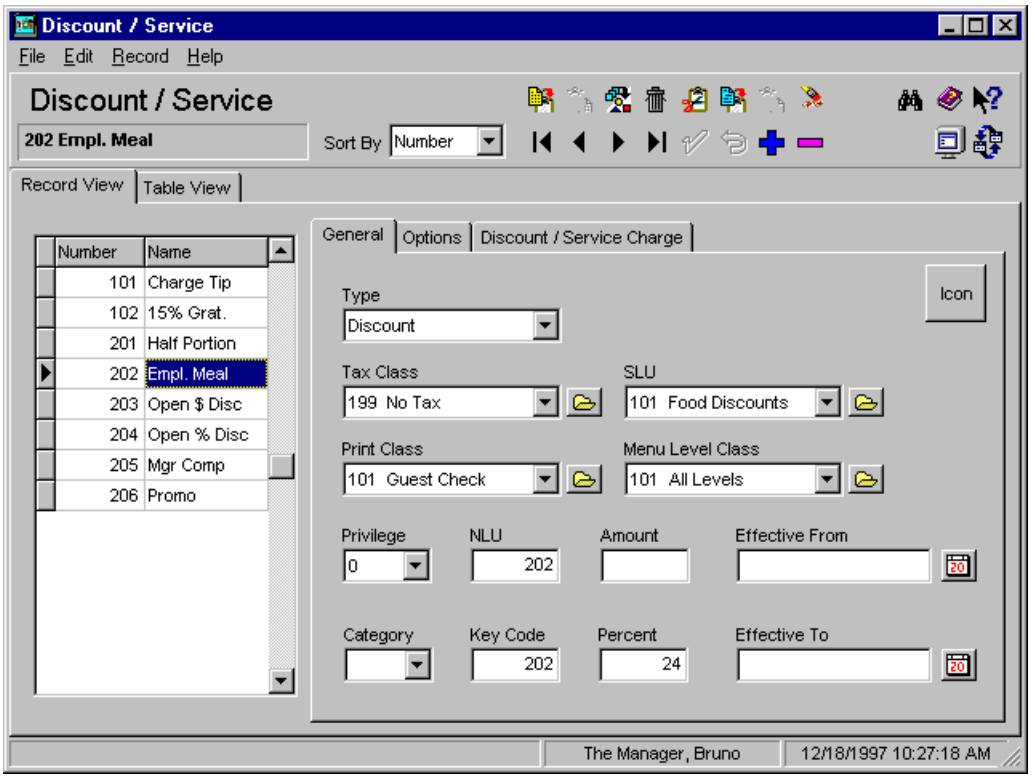
Discount/Service

Use this form to program the discounts and service charges used in this restaurant. Discounts include such items as Senior Citizen Discounts, Employee Meal Discounts, and Coupon Promotions. Typical service charges include Autogratuities, Room Service Charges, and Entertainment Cover Charges.

Programming

General

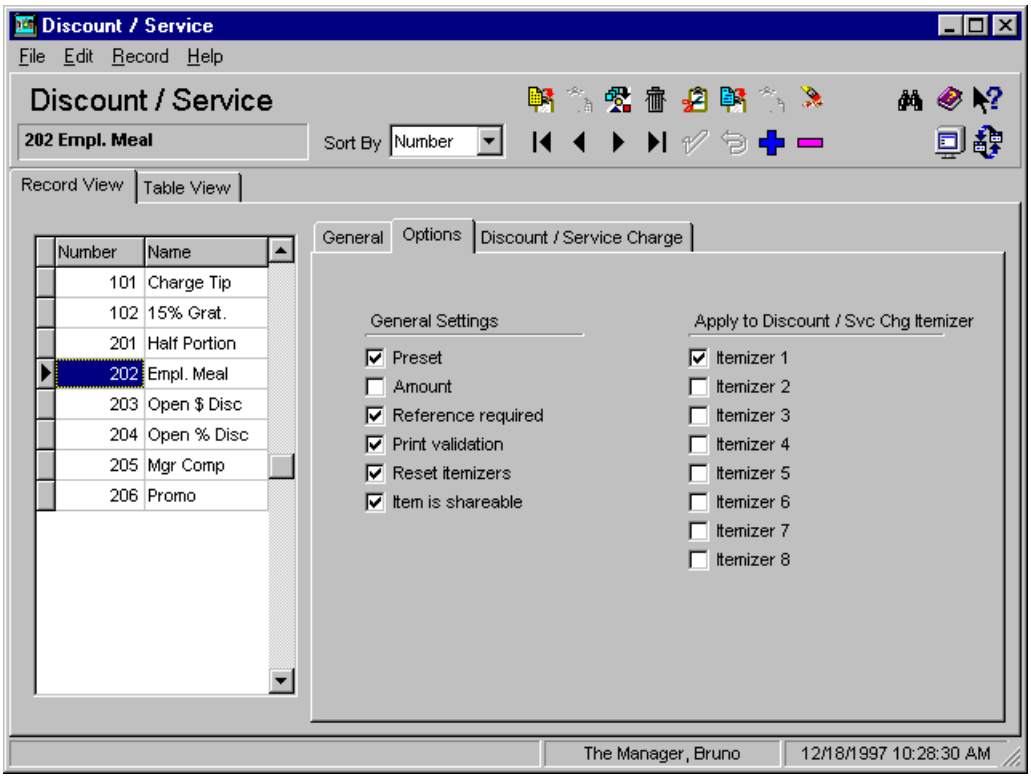
Create each discount and service charge this restaurant requires.



Example
This restaurant allows employees a 24% discount on employee meals. The discount is programmed as a key that appears on the Food Discounts SLU. Employees must have a privilege level of 2 or higher to use the key.

Options

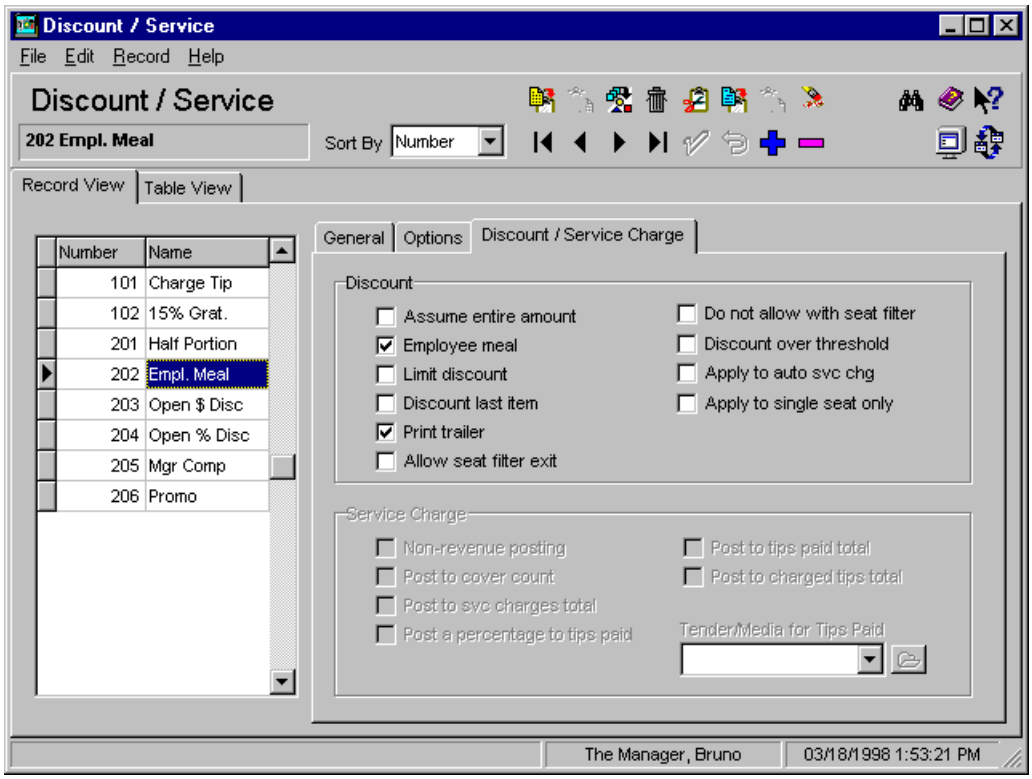
Select the options and itemizers that apply to each discount or service charge.



Example
Selecting the *Preset* option for the Empl. Meal discount, causes the 3700 system to apply the amount entered in the *Percent* field on the General tab. This discount is programmed to require a reference (the employee number) and prints a validation chit for the employee to sign.

Discount / Service Charge

Use this tab to complete the programming of Discounts and Service Charges. **Note:** Only the options that apply to the Type are available to each record.



Example
This restaurant limits the Empl. Meal discount to a maximum of $5.00. To create this limit, the option *Limit discount* was selected and $5.00 was entered in the *Amount* field on the General tab.

Tender/Media

Organizing Tender/Media

Micros recommends that tender/media keys be organized numerically based on their type. This makes reports easy to read and simplifies database maintenance tasks.

Types of Tender/Media

A *Payment* subtracts the amount entered from the amount due. If the result is 0, the check is closed and the transaction finalized. Examples of payment keys include: cash, credit cards, room charges and foreign currency. Payment keys can be created to record special activity, such as house charges, walk-outs, and employee meals.

A *Service Total* ends the current transaction and saves the check information for later recall. This type of key is also used for [Reprint Check], [Print Check], [Chain/Fire], [Hold/Fire], [Seat Check], and [Print Memo Check] keys.

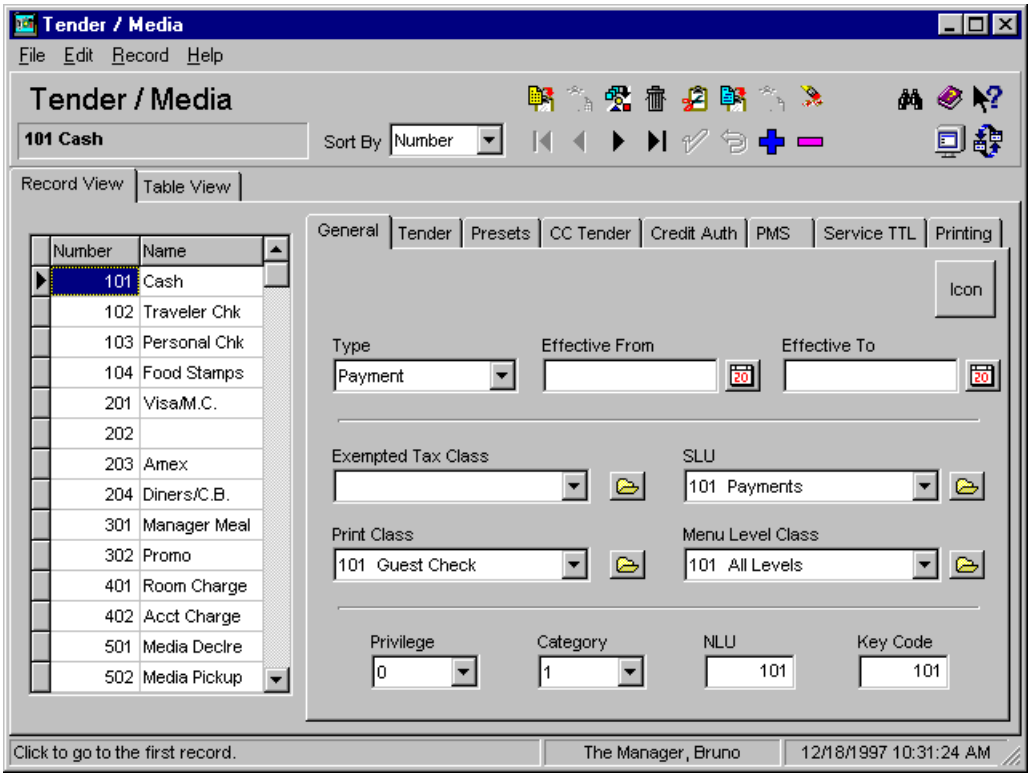
A *Pickup* records the withdrawal of cash from a cash drawer, such as payment of petty cash, or when money is collected in the middle of a high-volume shift to reduce liability at each UWS. It is also used to record tips paid.

A *Loan* records the addition of cash to a cash drawer, such as the beginning bank for a shift.

Programming

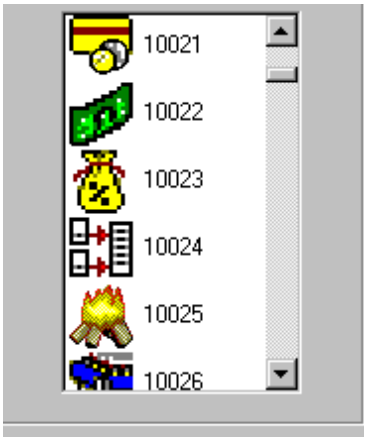
General

Create each tender/media key this restaurant requires.



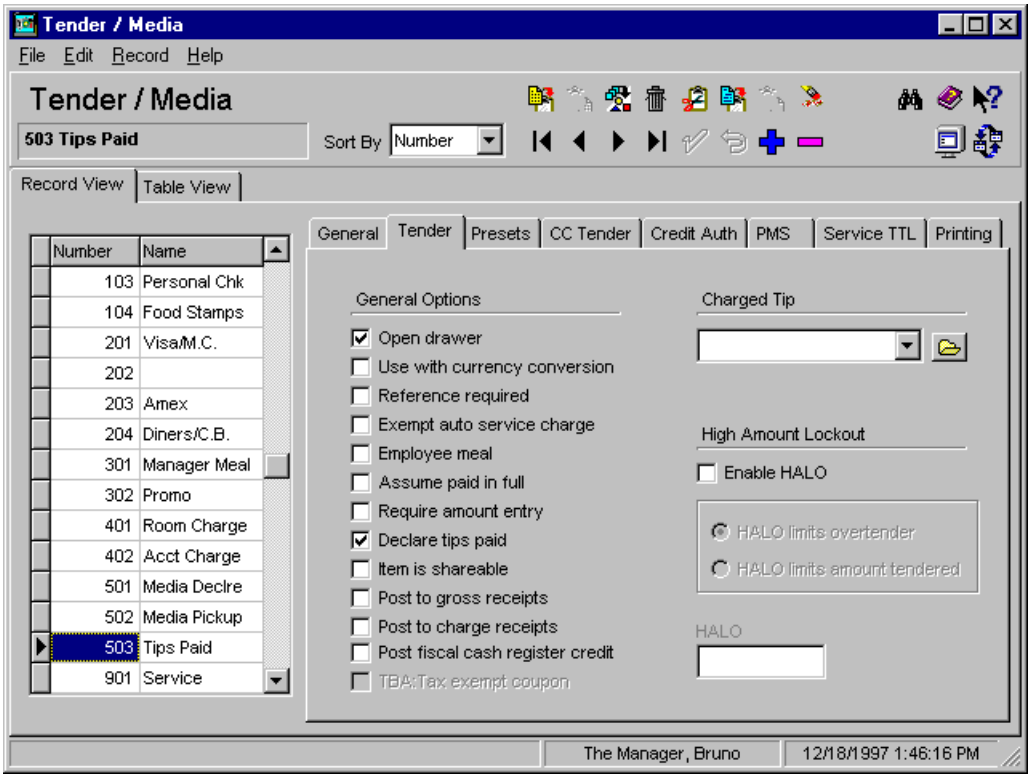
Example

This restaurant accepts cash, traveler's checks, personal checks, food stamps, and a variety of credit cards. A tender Media key is created for each. In addition keys are created for Media handling and service total functions. The 3700 system allows you to associate an icon with each Tender/Media key.



Tender

Select the options that apply to each tender/media key.

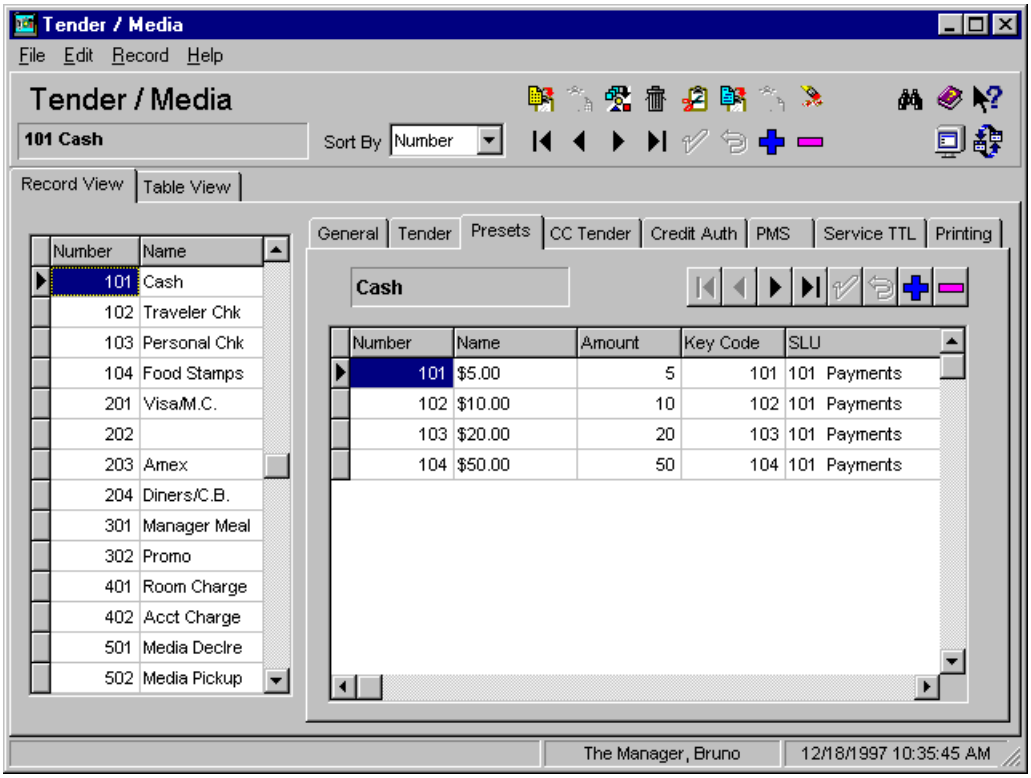


Example

For example, the option *Open drawer* is used with the[Cash] key, as well as with the [Tips Paid] key. Other options here are used to control the posting, HALO, and required entries for each key.

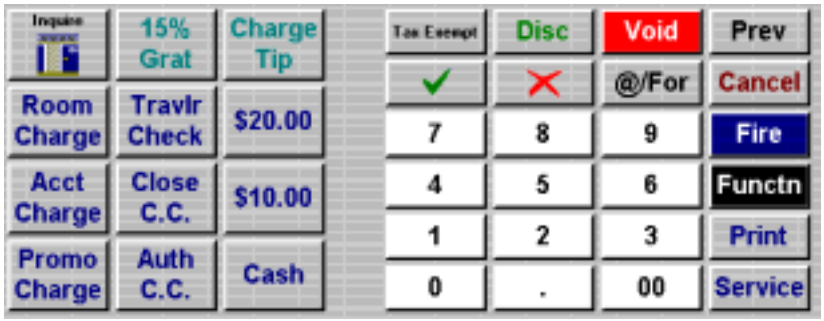
Preset Tender Keys

Create any Preset Tender Keys this restaurant uses.



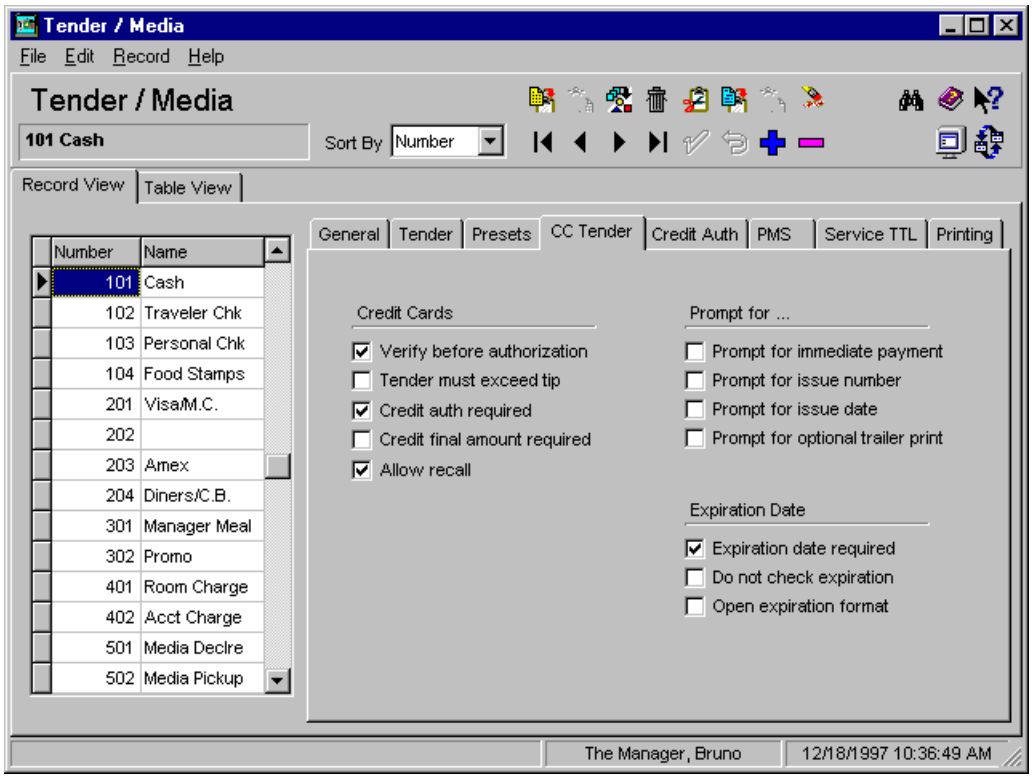
Example

This restaurant speeds up cash handling by programming payment keys for common denominations of U.S. dollars. The payment screen might look like this:



Credit Card Tender

Select options to control the verification and authorization requirements for credit cards accepted by this restaurant.

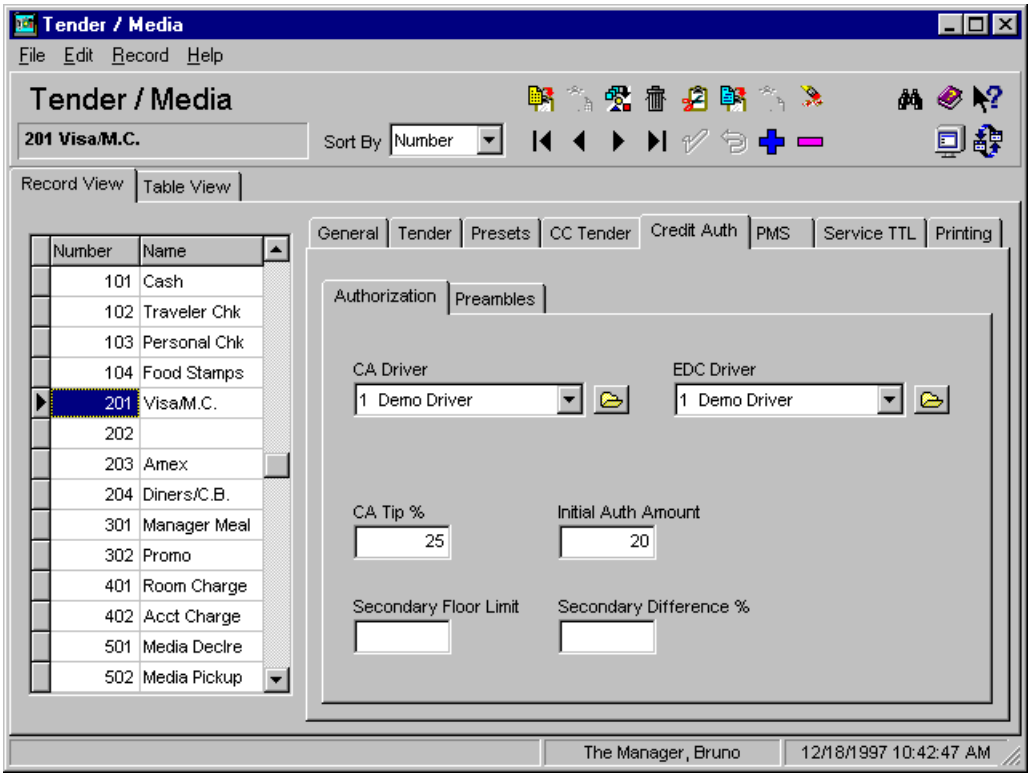


Example
This restaurant selects *Verify before authorization* to check the credit card number against known parameters of each credit card company before sending an authorization request. Micros recommends selecting this option for all credit cards. For more information refer to *The Feature Reference Manual.*

Credit Authorization

Authorization

Define the authorization limits and the Credit Authorization and Electronic Draft Capture processor for each credit card key you create.

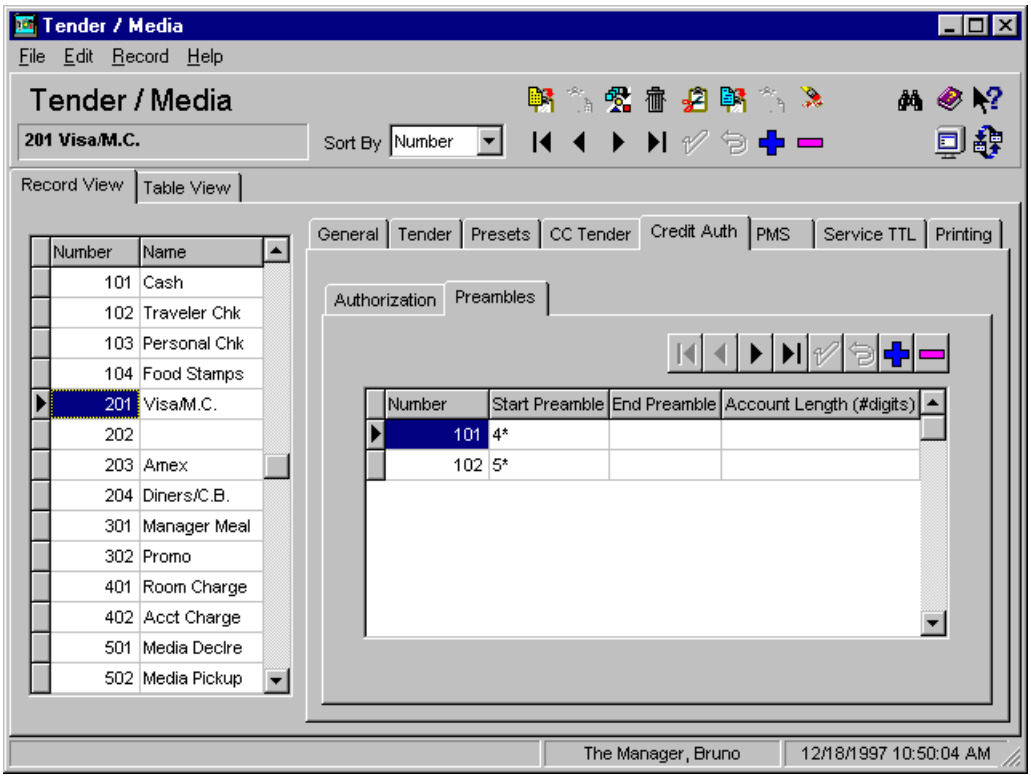


Example

In the example above, Visa and Mastercard are both authorized by the DEMO driver. Initial authorization requests are made for $20.00 and a 25% tip is automatically added to subsequent authorization requests.

Preambles

Enter the range of digits that identify each credit card type. The preamble is used to associate credit cards read with the magnetic card reader with the correct payment key.

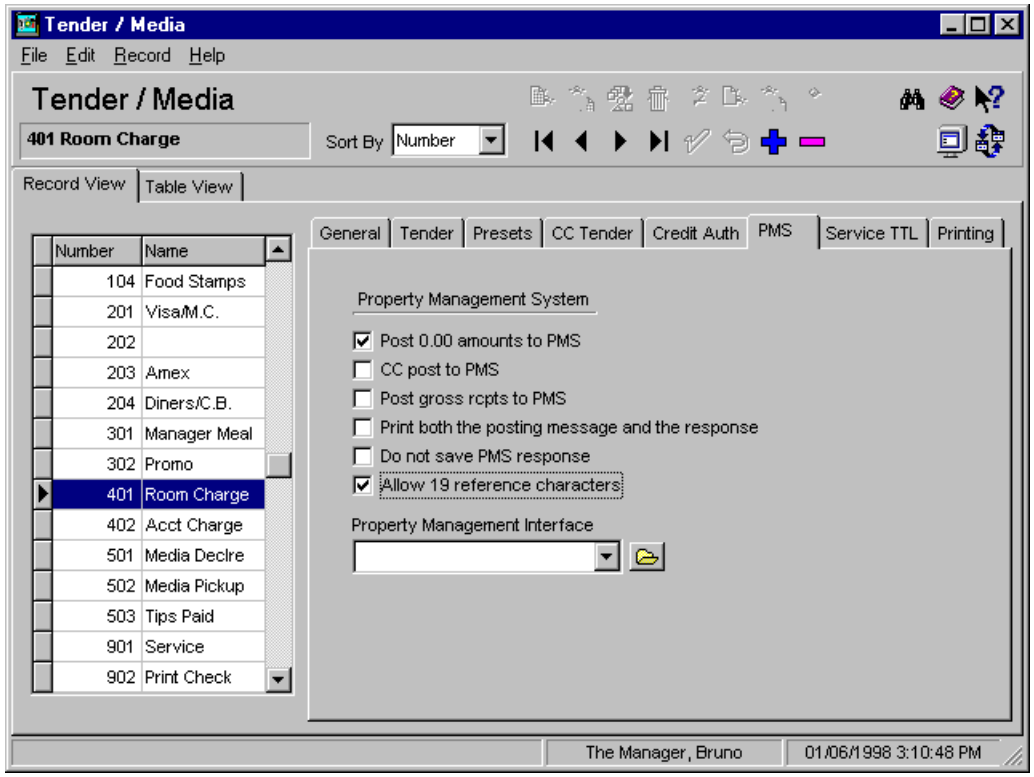


Example

For example, Visa is the only card that starts with 4. By entering 4*, any card that begins with 4 is identified as Visa by the system.

Property Management System (PMS)

Select the options that apply to each PMS key.

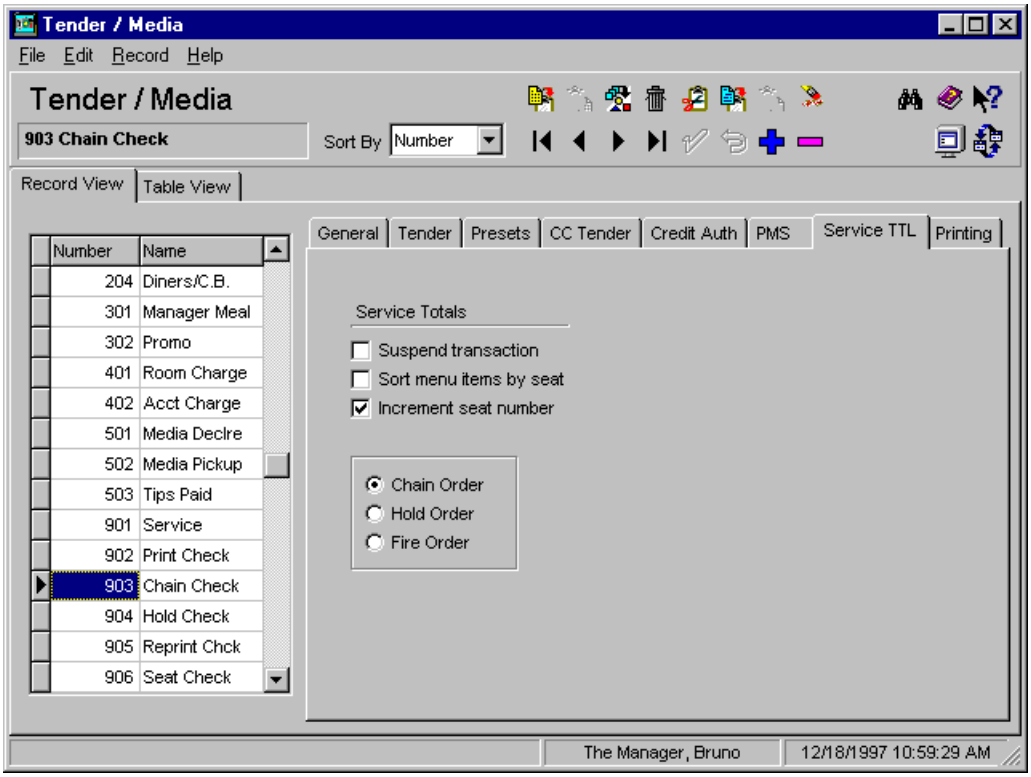


Example

For example, the Room Charge key allows the posting of 0.00 dollar amounts and a 19 character reference.

Service Total Options

Select options to add functionality to service total key types.

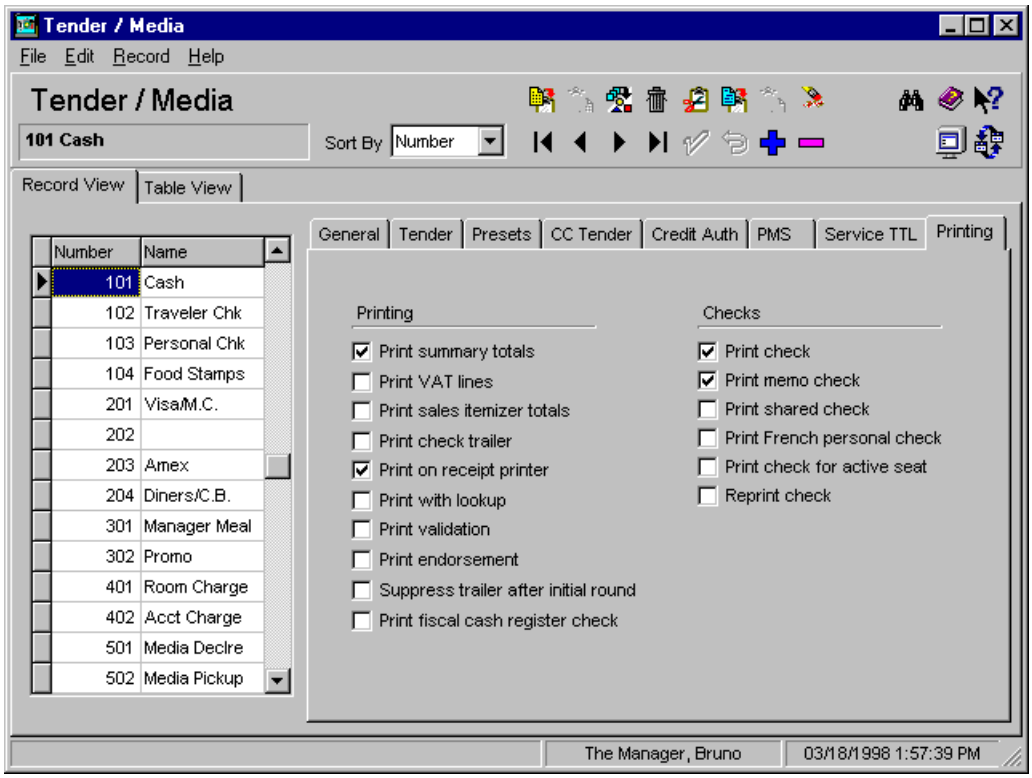


Example

To create a key that will "chain" several checks together, select *Chain Order*. The orders on the chained checks will all be sent to order output devices when the Fire key is pressed. This feature ensures that guests at the same table, but with separate checks, receive their food at the same time.

Printing

Select the printing options that this restaurant requires for each key.



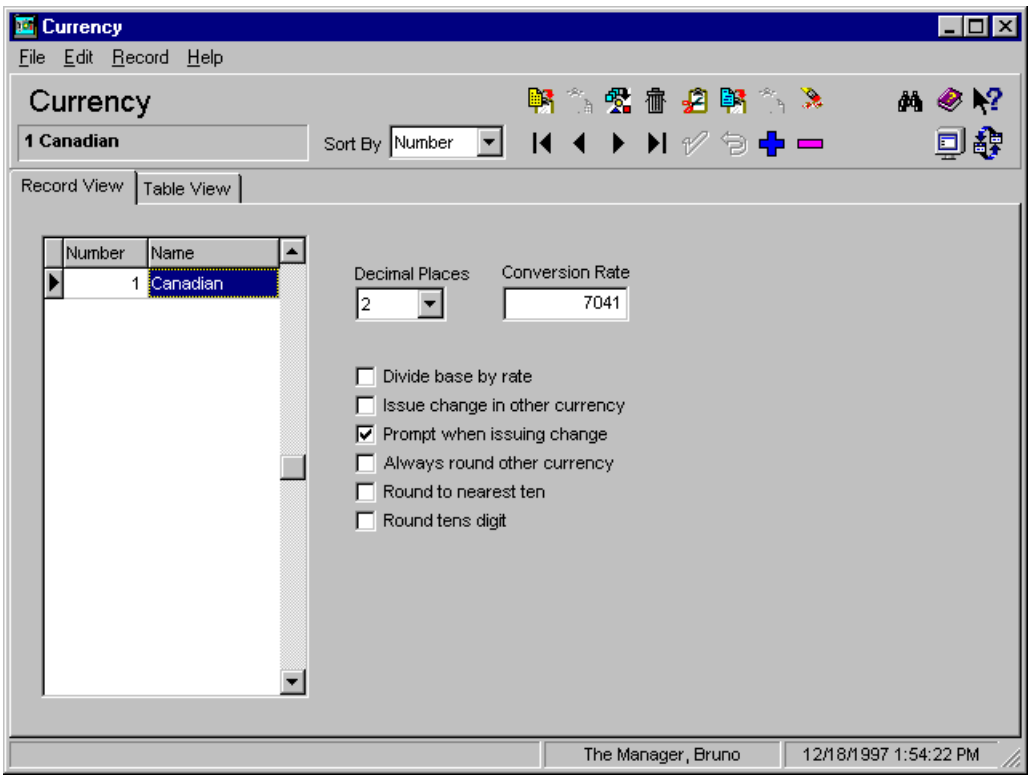
Example
The Media Declaration key above is programmed to print a validation chit. However, none of the print check options are selected because a media declaration does not require a check to print.

Currency

Use this form to program the system to accept alternate currencies.

Programming

Define the other currencies this restaurant accepts.



Example

Customers in this restaurant often pay with Canadian currency. The system is programmed to prompt the cashier for the currency in which to issue change. The UWS has two cash drawers assigned in the User Workstations form; one for U.S. currency and one for Canadian currency.

Courses

Use this form to define courses in restaurants that offer fixed price meals. For more information about Fixed Price Meals, see the *3700 Feature Reference Manual.*

Some of the characteristics of courses are:

- ❑ Posting a priced menu item as a course forces its price to be zero
- ❑ Posting additional course selections above those allowed with the fixed price meal causes the customer to be charged for the additional items
- ❑ Course selections may be posted during any service round

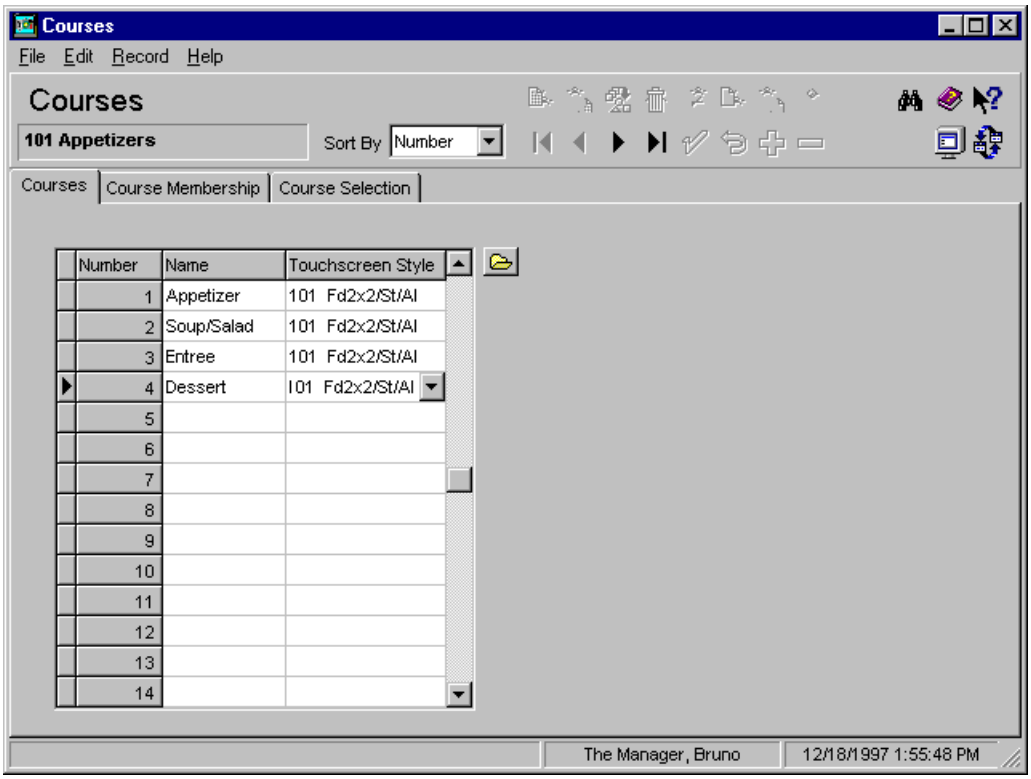
Use the following table to understand the steps for programming the Courses form. A restaurant offers the following fixed price meals:

Courses in Meal	Price	Course Selection Group
Soup/Salad, Entree, Dessert	$12.95	Lunch
Appetizer, Soup, Salad, Entree, Dessert	$21.95	Dinner

Programming

Courses

Create a record for each course this restaurant offers as part of a fixed price meal. The name can be descriptive, such as “Soup” or numeric, Course 1, Course 2, etc.

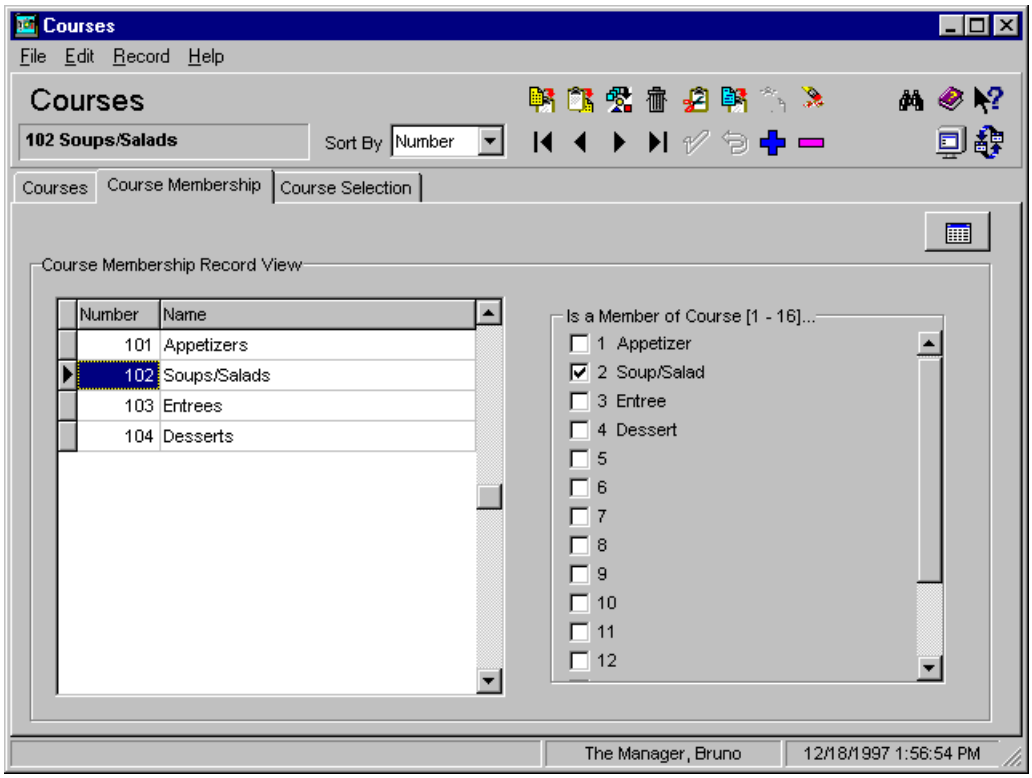


Example

This restaurant offers two fixed price meals; one at lunch and one at dinner. The lunch meal offers a choice from three courses: Soup/Salad, Entree, and Dessert. The dinner meal offers four courses: Appetizer, Soup/Salad, Entree, and Dessert. A record is created for each course that is part of a fixed price meal.

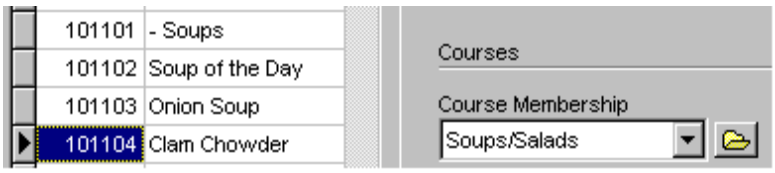
Course Membership

Create the course membership groups required by this restaurant.



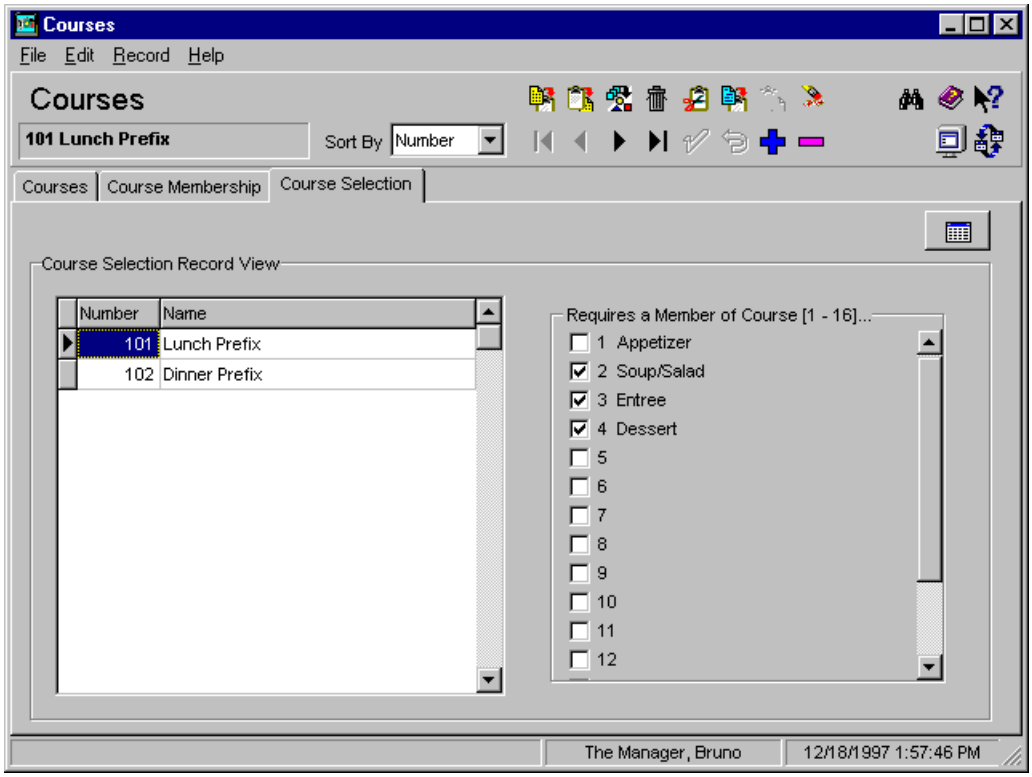
Example

The lunch meal allows a choice of either Soup or Salad as one of its courses. A course membership that includes soup and salad items is created. In the Menu Items form, items that are offered in this course are assigned to this Course Membership.



Course Selection

Create a record for each type of fixed price meal this restaurant offers and select the courses included in the meal.



Example
The fixed price lunch meal in this restaurant includes selections from the Soup/Salad, Entree, and Dessert courses.

Descriptors

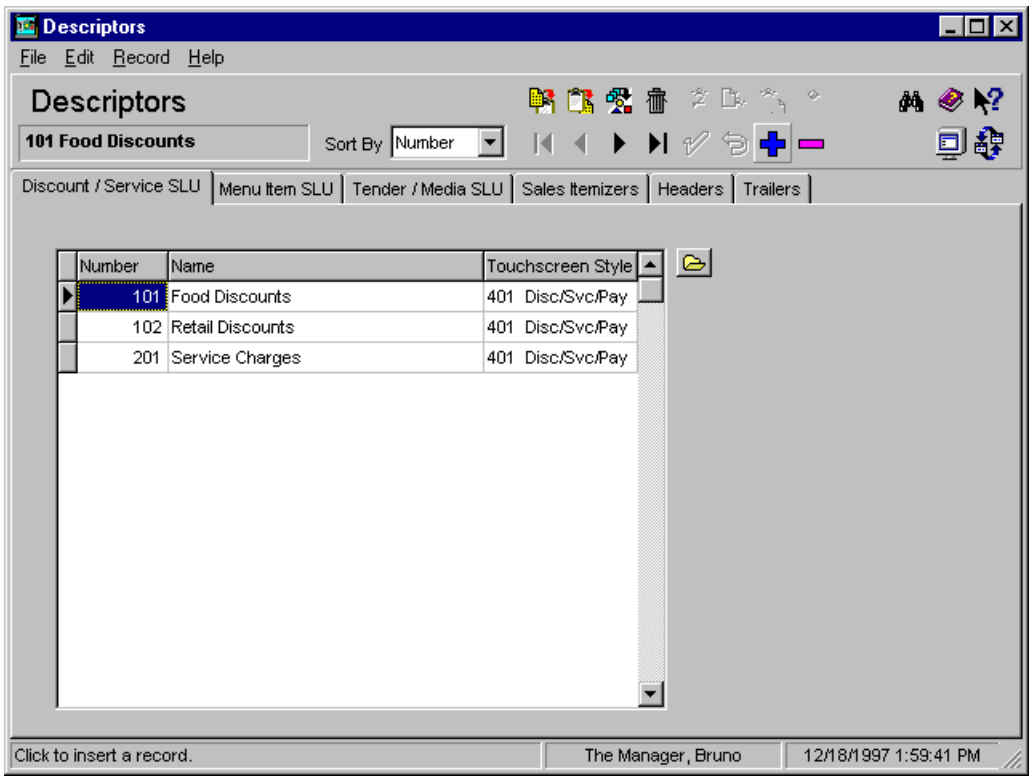
In the 3700 system, a descriptor is a word or phrase that appears on a UWS display, report, and/or prints at a 3700 printer. Use the Descriptors form to program:

- ❑ SLU names and styles
- ❑ Sales Itemizers
- ❑ Headers and Trailers

Programming

Discount/Service SLU

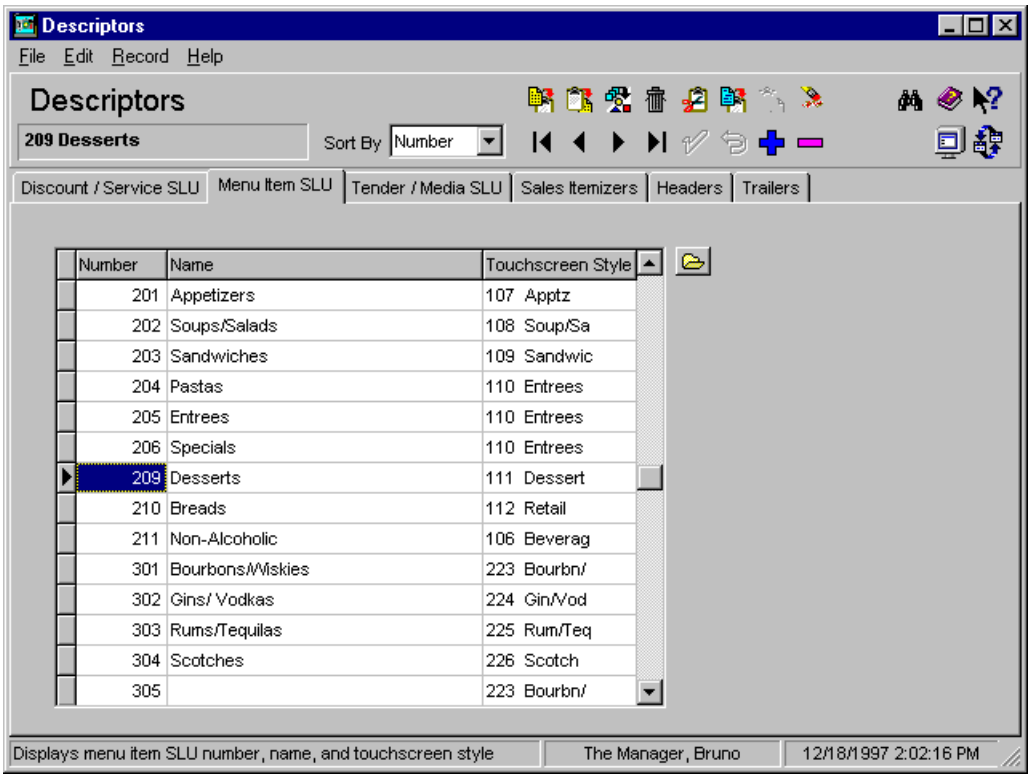
Enter a name to describe each SLU this restaurant requires and select a style for generated keys.



Example
This restaurant displays two different SLUs for discounts. By creating separate SLUs for each type of discount, this restaurant is able to display only the discounts that apply in each revenue center.

Menu Item SLU

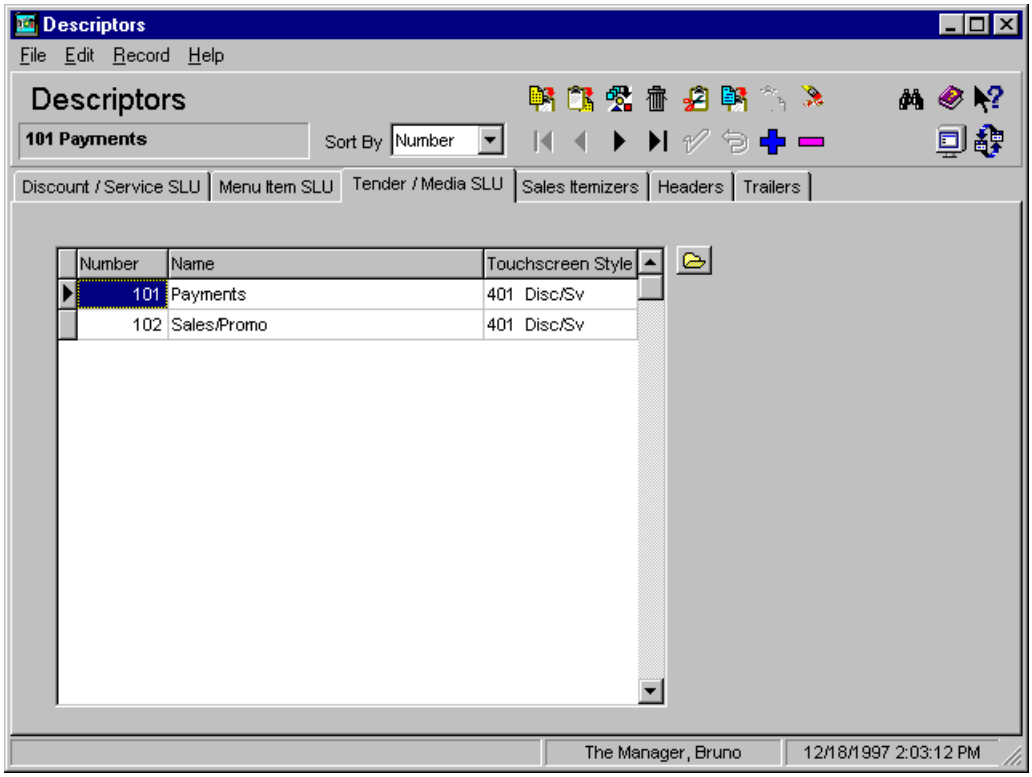
Enter a name to describe each Menu Item SLU this restaurant requires and select a style for generated keys.



Example
The employee can easily locate the menu item, Ice Cream, because it's logically assigned to an SLU. In this case Desserts!

Tender/Media SLU

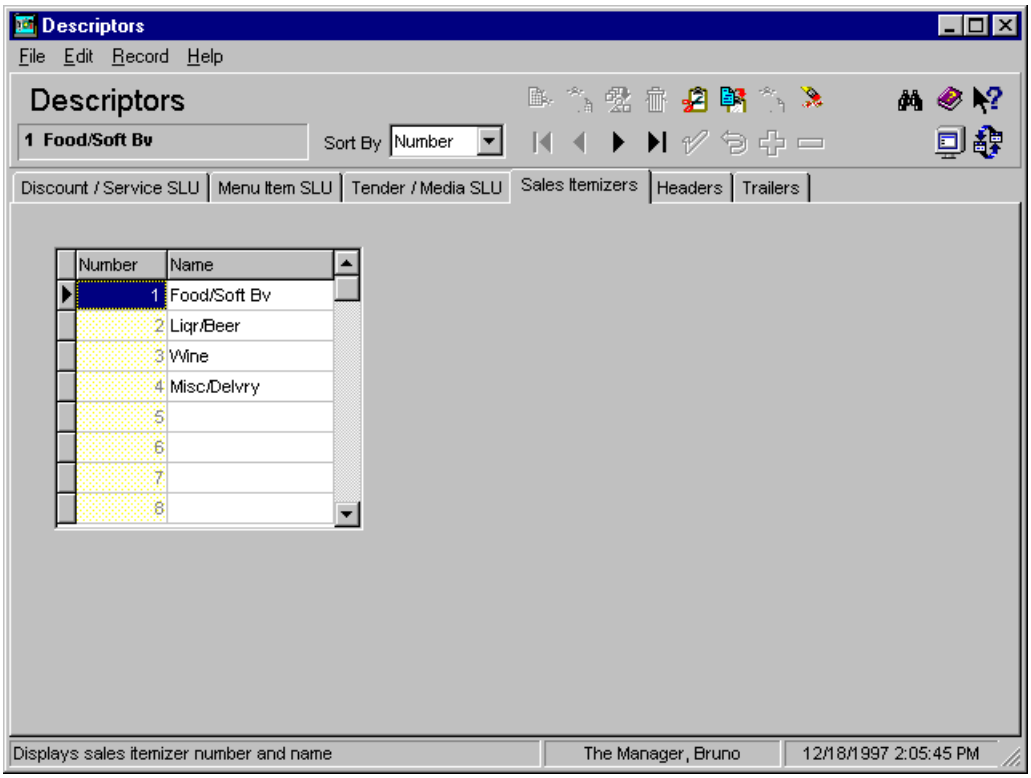
Enter a name to describe each Tender/Media SLU this restaurant requires and select a style for generated keys.



Example
This restaurant places keys for tendering cash, checks, credit cards and Traveler's Checks on a Screen Lookup that can be accessed from the Default Transaction screen.

Sales Itemizers

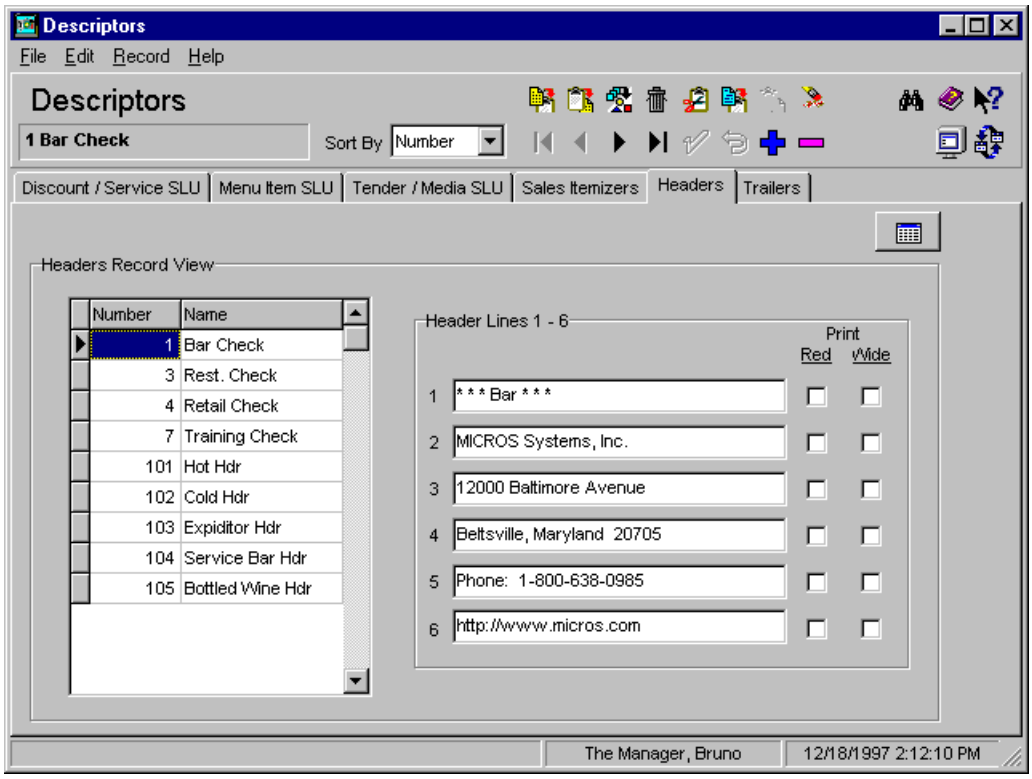
Create the itemizers this restaurant requires for subtotaling menu items.



Example
This restaurant subtotals food and soft beverages separately from liquor, beer and wine.

Headers and Trailers

Enter a name to describe each Header and Trailer this restaurant requires.



Example
The Bar Check header created above prints on customer receipts.

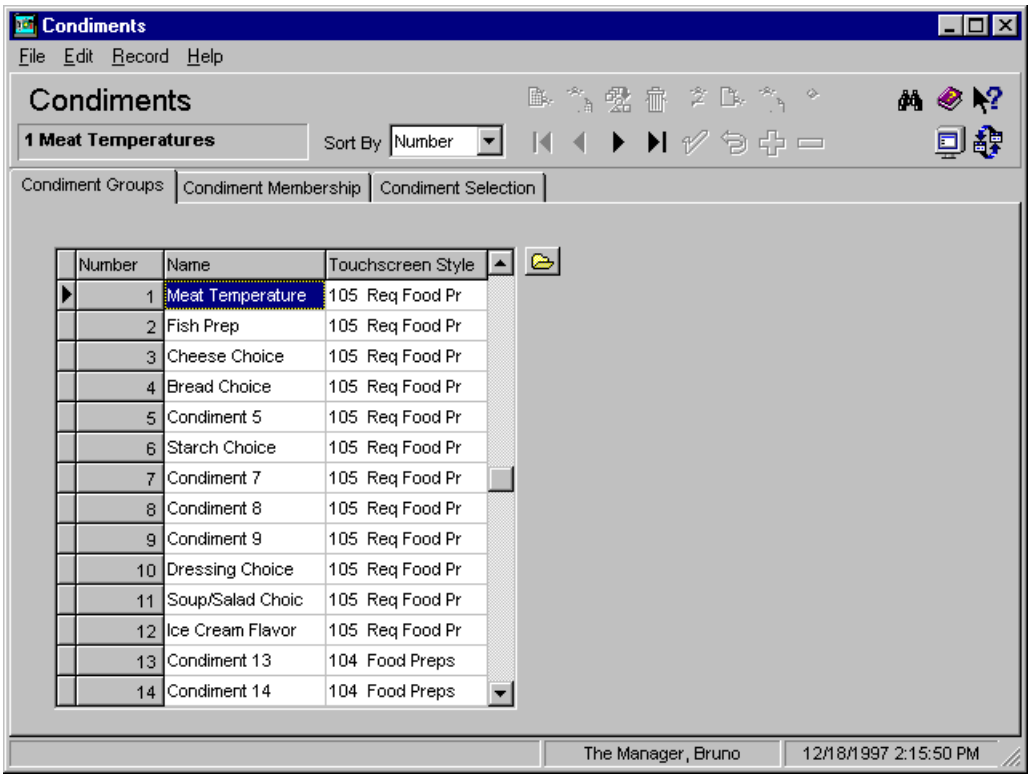
Condiments

Use the Condiments form to program the condiment groups for this restaurant.

Programming

Condiment Groups

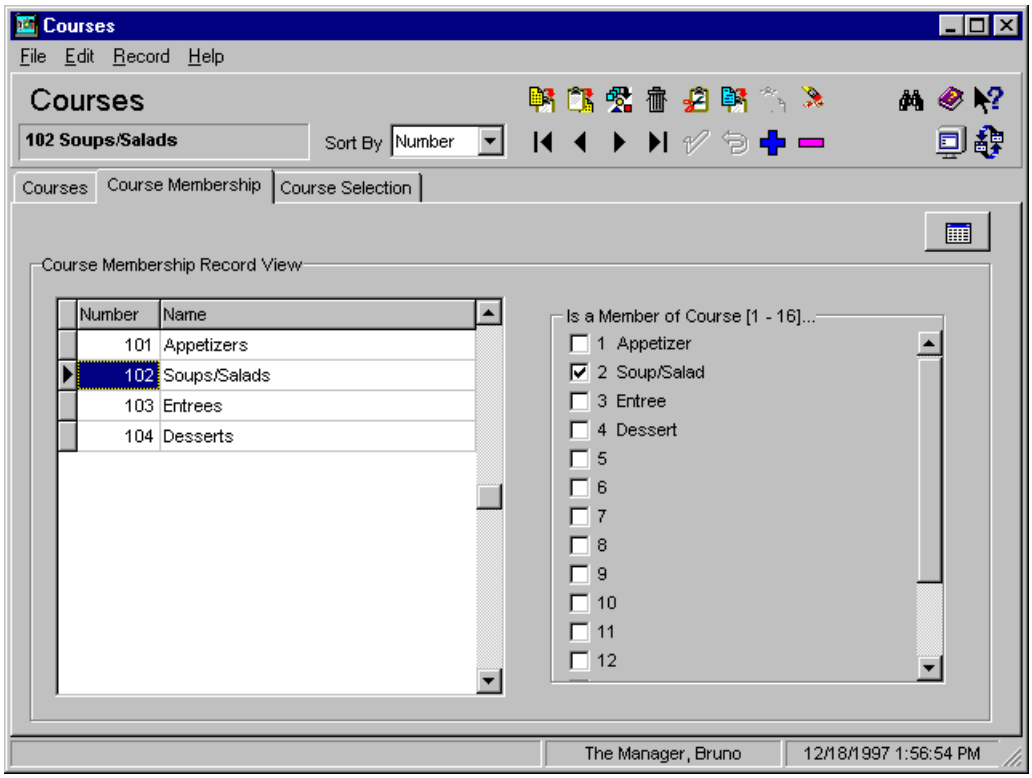
Create a group for each type of condiment required by this restaurant.



Example
This restaurant requires condiment groups for Meat and Fish preparation because it offers several entrees of this type.

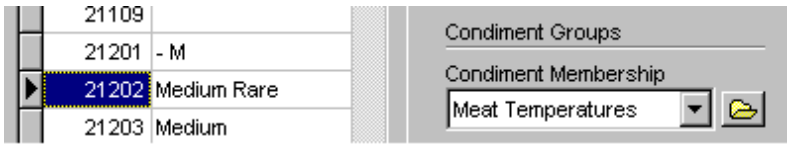
Condiment Membership

Create larger membership classes for condiments and select the groups that belong to each.



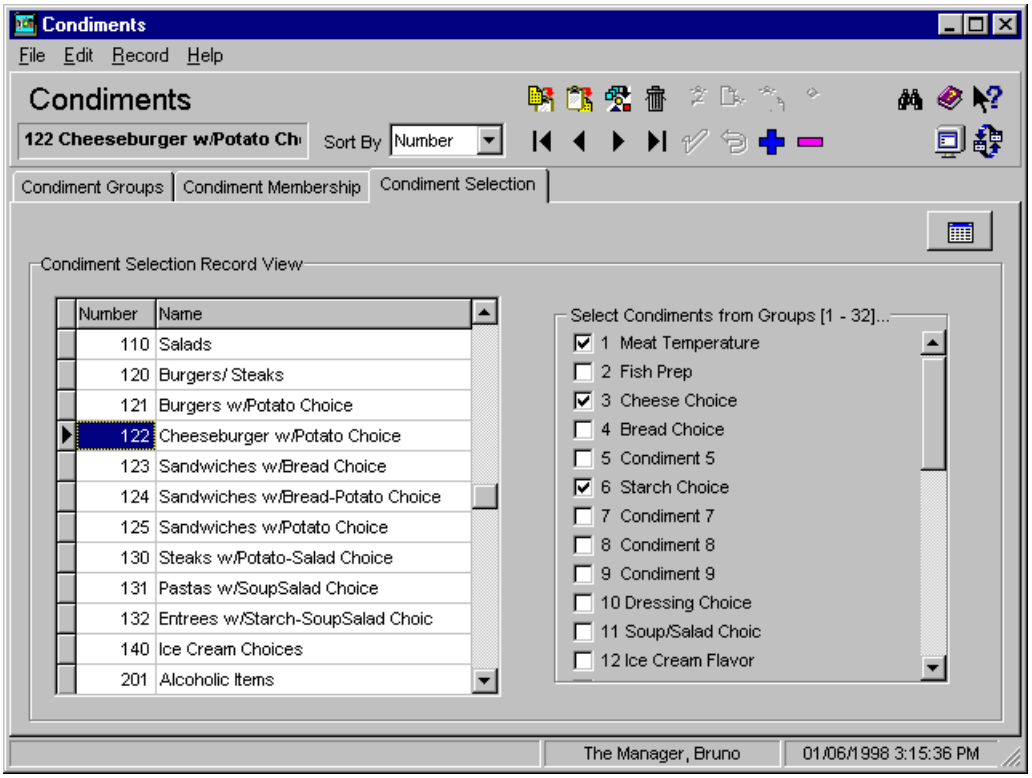
Example

A condiment Membership class called “Meat Temperatures” is created. Meat Temperature selections are placed in this class when programming the Menu Items form as shown below:



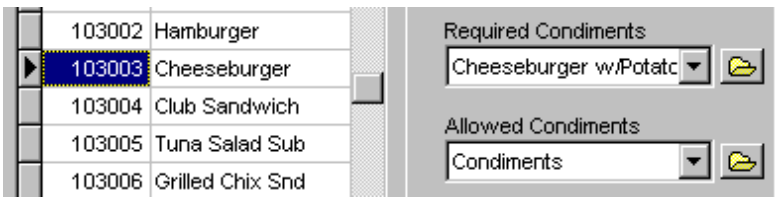
Condiment Selection

Create the allowed and required condiment selections required for each type of menu item in this restaurant.



Example

A separate condiment selection is created for cheeseburgers in this restaurant. When used as a Required Condiment selection in the Menu Items form, the employee is required to post the Meat Temperature, Cheese Choice, and Starch choice for cheeseburgers. Another condiment selection group which includes general condiment selections such as mayonnaise, ketchup, and pickles is used as an Allowed Condiment selection for cheeseburgers. The section of the Menu Items form shown below shows how condiment selections are used.



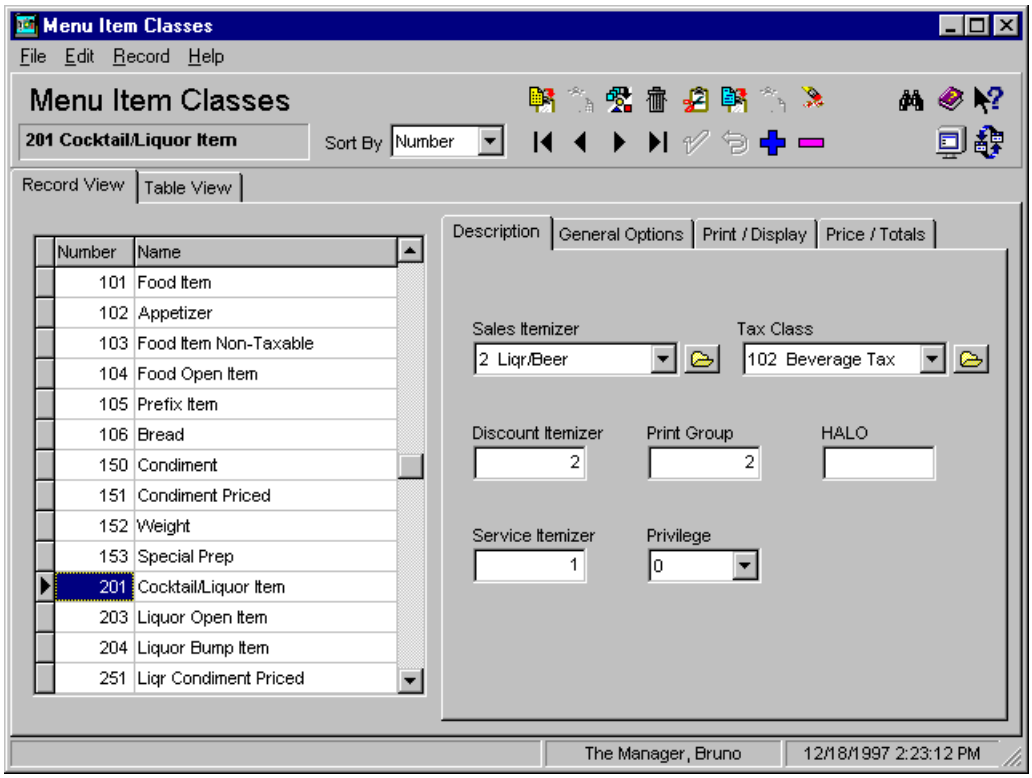
Menu Item Classes

Use the Menu Item Classes form to simplify programming by assigning the same privilege levels and option settings to all menu items in a class.

Programming

Description

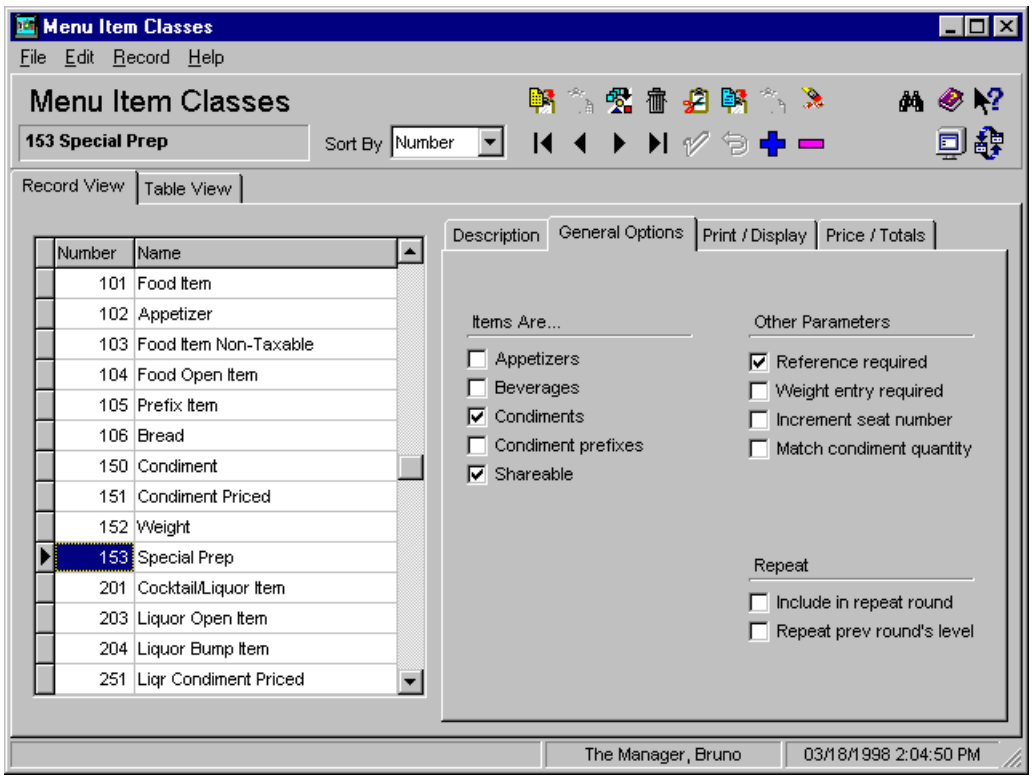
Create the Menu Item Classes required by this restaurant.



Example
Menu items assigned to the Menu Item Class “Cocktail/Liquor” share characteristics assigned to the class. A Bloody Mary and a Daiquiri, for example, share the same Tax Class and itemizer selections.

General Options

Define the characteristics of each menu item.

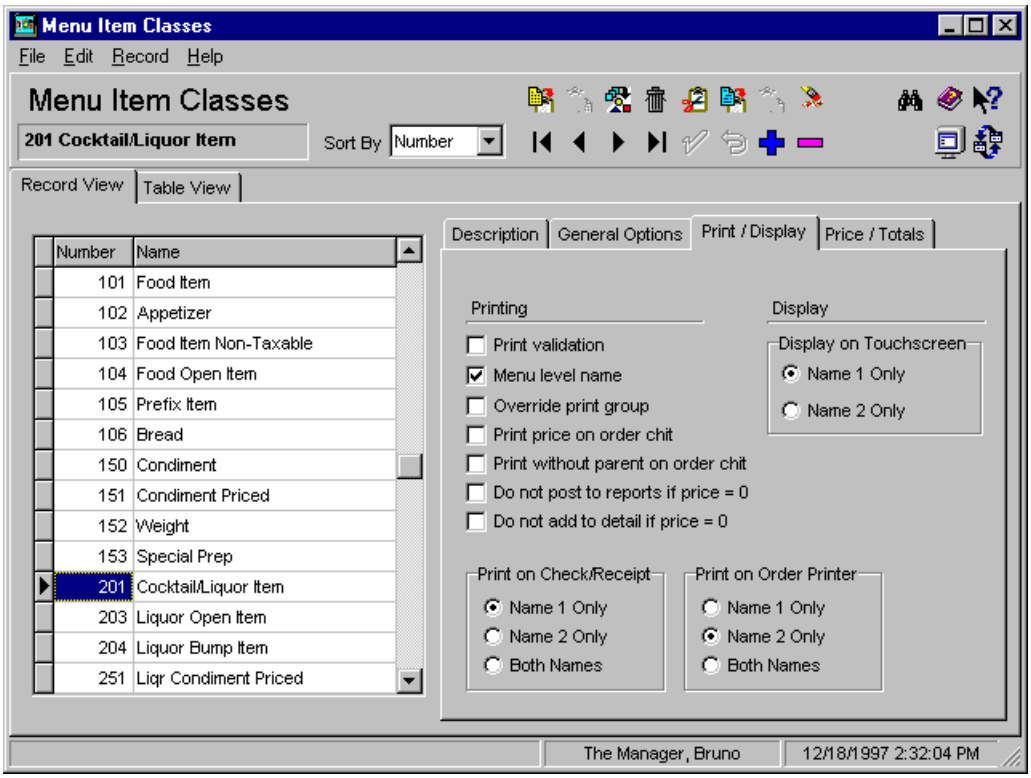


Example

You can define certain Menu Item Classes as *Beverages* when you are using the Beverage Control feature of the 3700 system. See the *3700 Feature Reference Manual* for information about this feature.

Print/Display Options

Select options to control the printing and display of each class of menu items on order chits, customer receipts, and UWS displays.

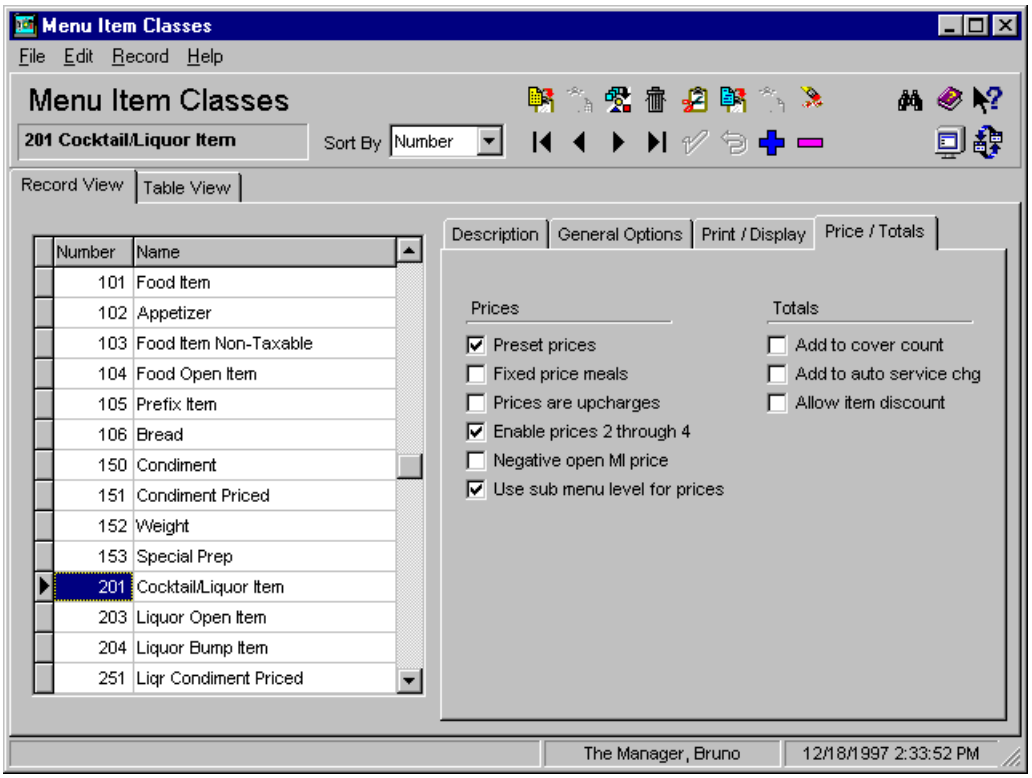


Example

Menu Items in the "Cocktail/Liquor" class are programmed to print as nicknames at the order printer located behind the bar. The nickname for each item is entered in the *Name2* field of the Menu Items form.

Price / Totals

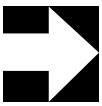
Select the required pricing and posting options for each class of menu items.



Example
This restaurant reduces drink prices during Happy Hour. By selecting *Enable prices 2 through 4* and *Use sub menu level for prices*, the restaurant can create several prices for the drinks in this Menu Item class.

Menu Items

Use this form to program menu items. The Menu Item table is one of the largest in the database. You should plan and organize it before program it.



Note

Condiments which are offered as charged items and as non-priced items must be entered twice.

Organizing the Menu Items form

MICROS recommends that menu items be organized numerically based on their Major Group and further divided by Family Group. This makes reports easy to read and simplifies database maintenance tasks.

For example, you might include an Index at the top of the form which lists the numbers associated with each Major Group.

Within each Major Group, Family Groups may also be assigned a specific numeric range. For example, all menu items belonging to the Major Group, “Beer” might be assigned a numeric range of 1000 - 1999. Within the “Beer” Major Group, the Family Group, “Draft Beer” could be numbered 1000-1099, while another Family Group “Bottled Beer” could be numbered 1100-1199.

You should group menu items according to similarities and pre-assign ranges of record numbers. Use the example below as a starting point. Numbering varies for each restaurant, depending on the number of menu items in each Major Group.

A Numbering Plan	
1000 Beers 2000 Glass Wines 3000 Bottle Wines 5000 Liquor 6000 Aperitif 6100 Brandy 6200 Cognac 6300 Sherry/Port 6400 Liquors 8000 Cocktails	20000 Food Preps 25000 Bar Preps 35000 Non-Alcoholic 101001 Appetizers 101101 Soups 102001 Salads 103001 Sandwiches 104001 Pastas 105001 Entrees 106001 Desserts 199001 Specials

Naming Menu Items

The 3700 system allows you to assign two names to each menu item. Programming determines whether Name1, Name2, or both, appear in the transaction detail, and on guest checks, receipts and remote order devices. Name1 prints on reports.

Name2 can be used where the kitchen staff speaks a another language, or where the kitchen uses abbreviations.

SLU Priorities

Assign an SLU priority to control the order in which items display on touchscreens. For example, a long list of mixed drinks might display alphabetically on several screens when the [Cocktail] key is pressed. By assigning the most popular drinks an SLU priority of 1, and others a priority of 2 or 3, you can create three alphabetical lists of cocktails. Employees will find the popular drink on the first pages.

Assigning Menu Items to Courses

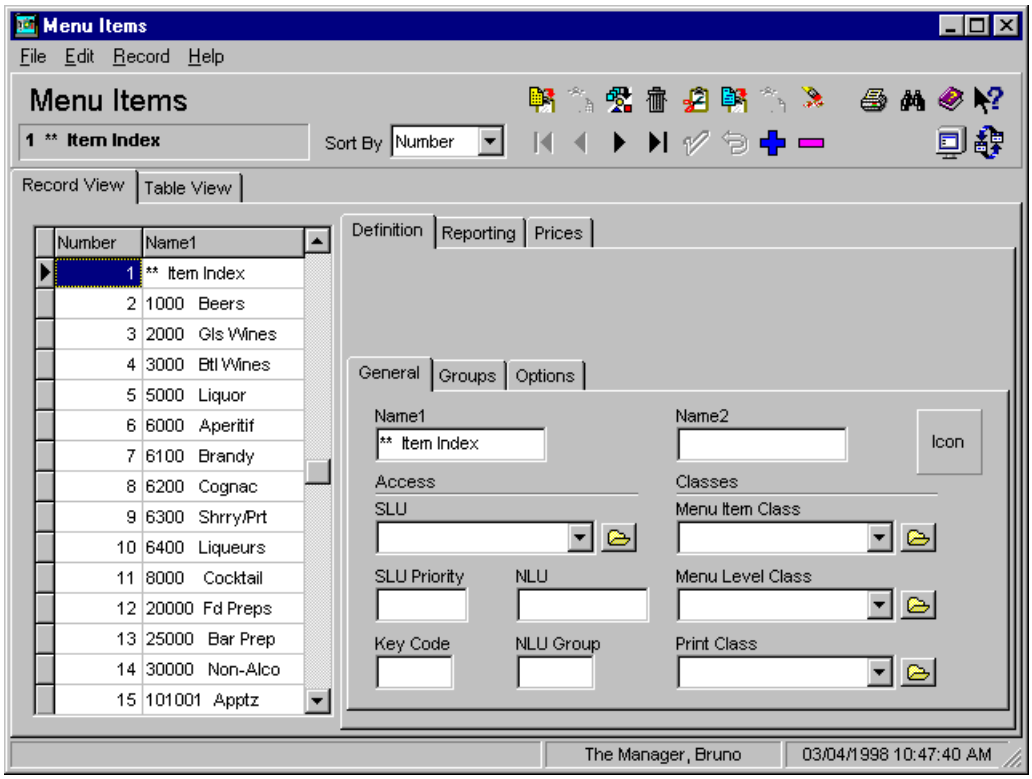
If the menu item is:

- A course in a Fixed Price Meal, select the course to which it belongs in the Course Membership field. For example, Clam Chowder would belong to the Soup course.
- A fixed price meal, select the course selection group from which choices may be selected in the Course Selection field. For example the Seafood Special might include selections for a selection group that includes the courses Salad, Entree, and Dessert. The courses that are included in each Course Selection option are programmed in the Courses form.

Programming

Definition / General

Create a record for each menu item and condiment this restaurant requires.

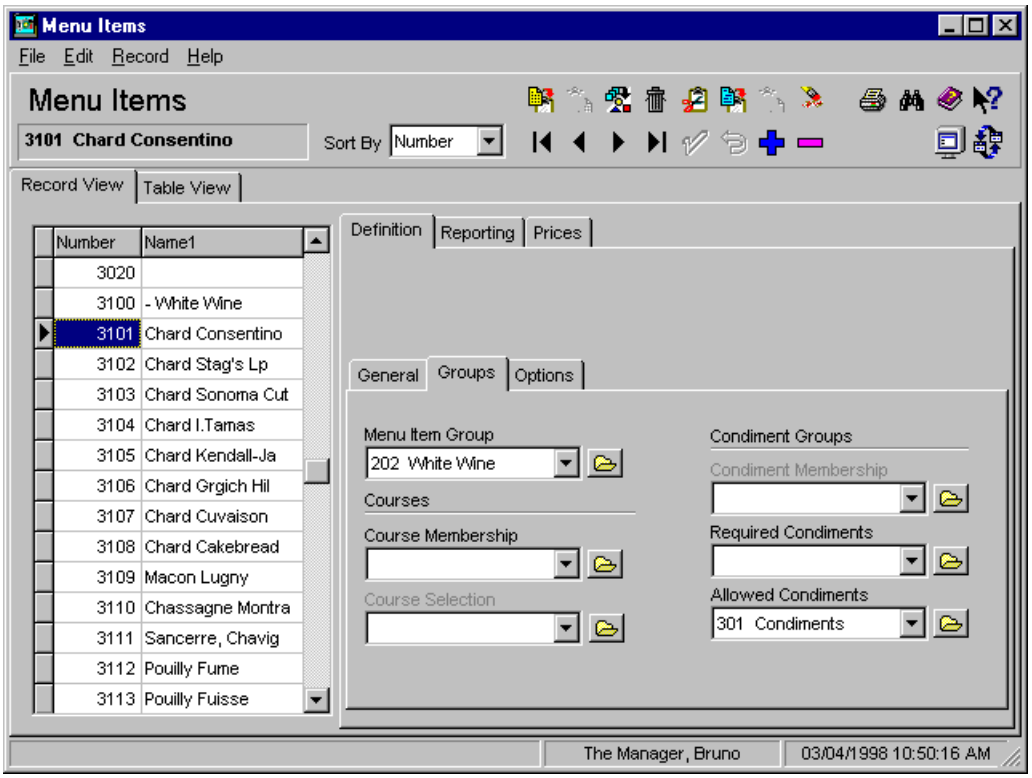


Example

In this restaurant, bottled wines are programmed to display in an NLU (Number Lookup) window because the list is so lengthy. The employee chooses an item by entering the NLU number.

Definition / Groups

Select the groups for each menu item this restaurant requires.

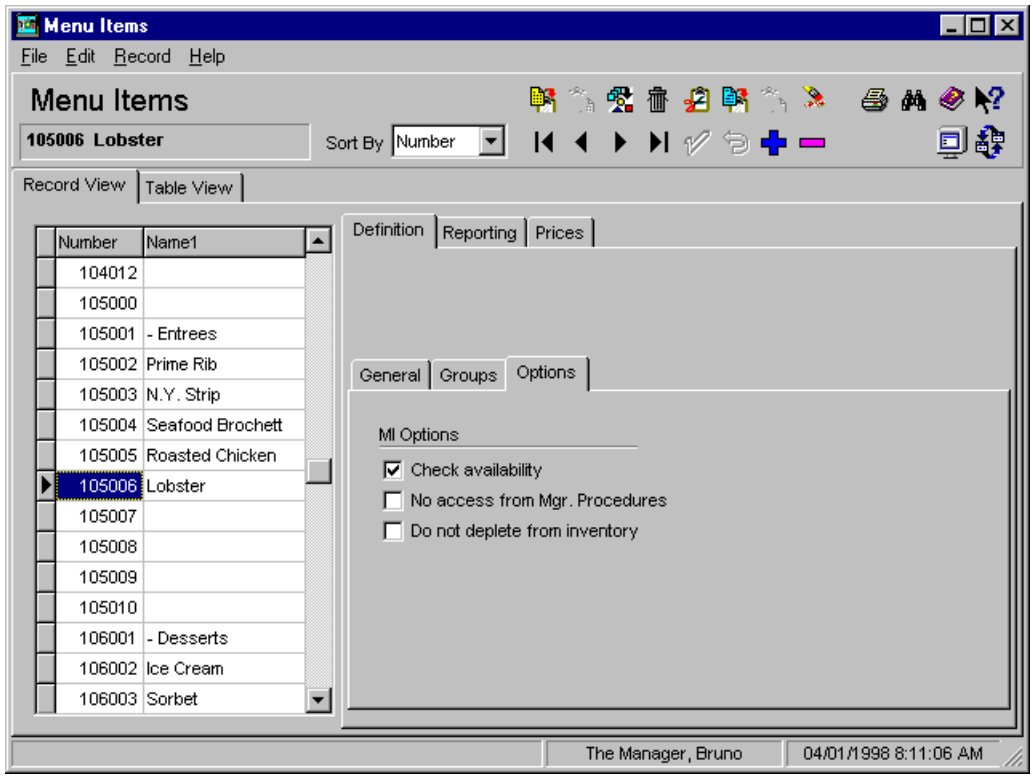


Example

You can select a Menu Item and Condiment Group for each menu item. The menu item will be included in sales totals for the selected group.

Definition / Options

Select the options that apply to this menu item.



Example

This restaurant has a limited number of lobsters each day for sale. Selecting the option *Check availability* causes the system to display the prompt: "THIS MENU ITEM IS SOLD OUT" when there are no more lobsters available.

If an order is placed for more lobsters than is on hand, the system responds with the prompt, "ONLY [#] ITEMS REMAINING".

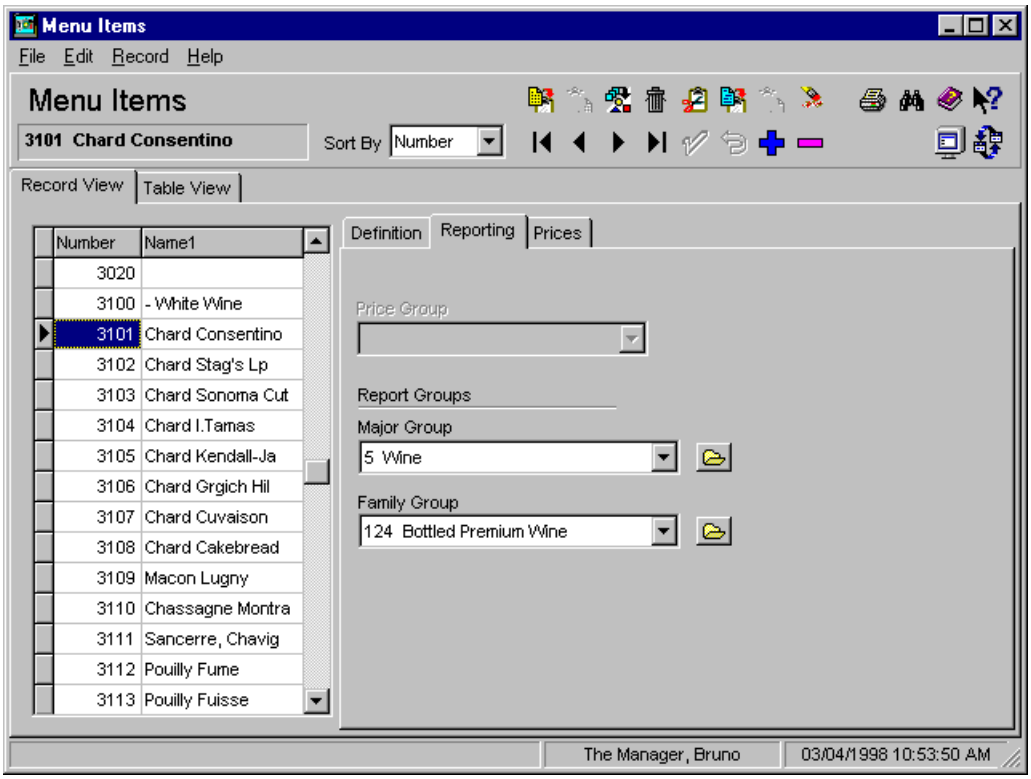
If, for some reason, the restaurant did not receive their shipment of lobsters, the system responds with the prompt "MENU ITEM NOT AVAILABLE".

Note

The manager enters the number of lobsters available each day through Manager Procedures.

Reports

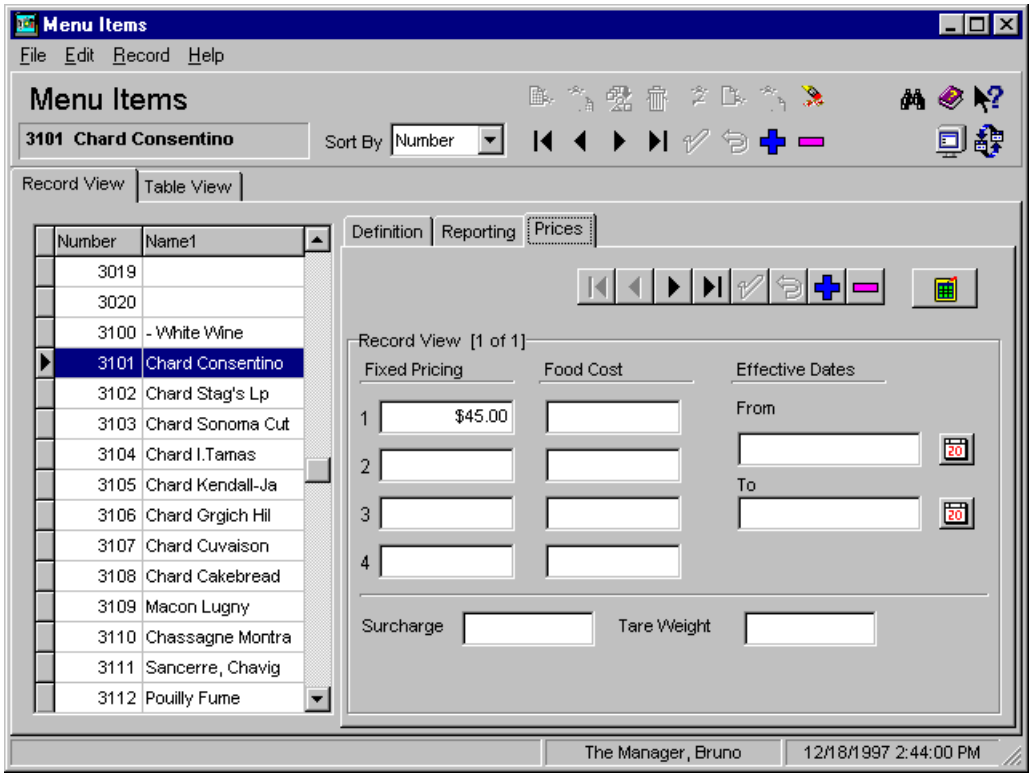
Select the Major and Family Groups for each menu item this restaurant requires.



You can select a Major, and Family Group, for each menu item. The menu item will be included in sales totals for the selected groups.

Prices

Create prices for each menu item and condiment this restaurant requires.



Example

Each menu item may have up to four different prices. The prices may change depending on the revenue center, time of day, or active menu level. In order for a menu item to have more than one price, the option *Enable prices 2-4* must be selected in Menu Item Classes | Price/Totals.

Chapter 7

Revenue Centers

The forms in the Revenue Centers folder contain options for customizing restaurant operations in each revenue center.

In this chapter

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RVC Display Design 7-8
RVC Posting 7-9
RVC Printing 7-11
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RVC Interfaces 7-18
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Overview

Different revenue centers are defined within a system to provide sales tracking, accounting, and transaction control. Usually, a revenue center matches an outlet in the restaurant, such as a bar, dining room, or a retail shop.

Defining options for each revenue center allows a restaurant to:

- ❑ Provide accounting information for outlets in the system, as a subset of the system.
- ❑ Control or restrict access.
- ❑ Define functional characteristics for the outlet. For instance, the operations in a bar can vary from those in a dining room.

Configure the forms in the Revenue Centers folder in the following order:

1. RVC Credit Cards
2. RVC Discount/Service
3. RVC Display Design
4. RVC Interfaces
5. RVC Posting
6. RVC Printing
7. RVC Print Design
8. RVC Sales
9. RVC Taxes
10. RVC Transactions
11. RVC Touchscreens

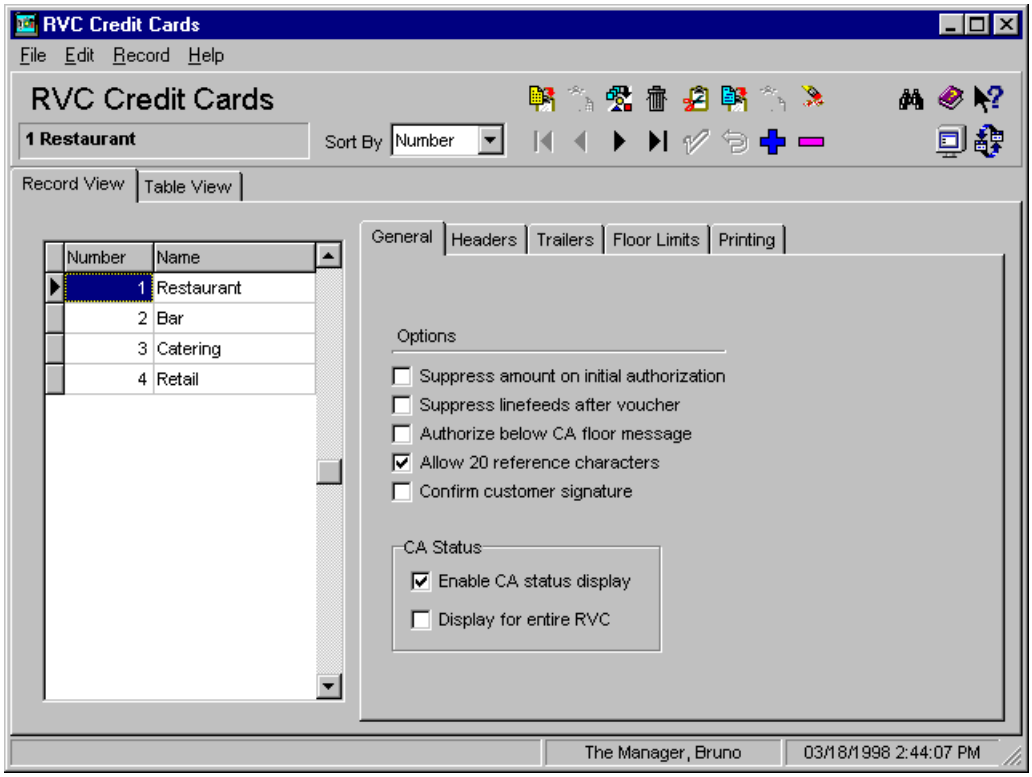
RVC Credit Cards

Different revenue centers require different credit card handling options. The 3700 system allows you to customize credit card handling in each revenue center.

Programming

General

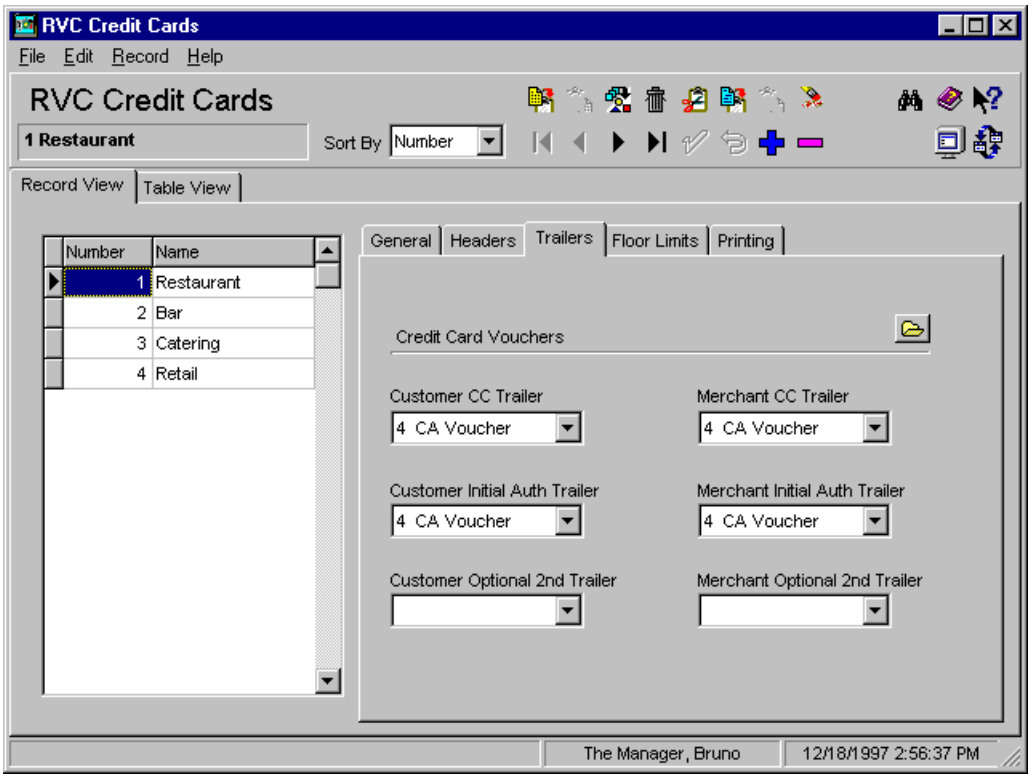
Select the credit card options that apply to each revenue center.



Example
This restaurant has several workstations in the Restaurant revenue center. By selecting the option *Display CA status on UWS only*, the status of pending credit authorizations can be displayed separately, at each UWS.

Headers / Trailers

Select the headers and trailers to print on credit card vouchers for each revenue center.

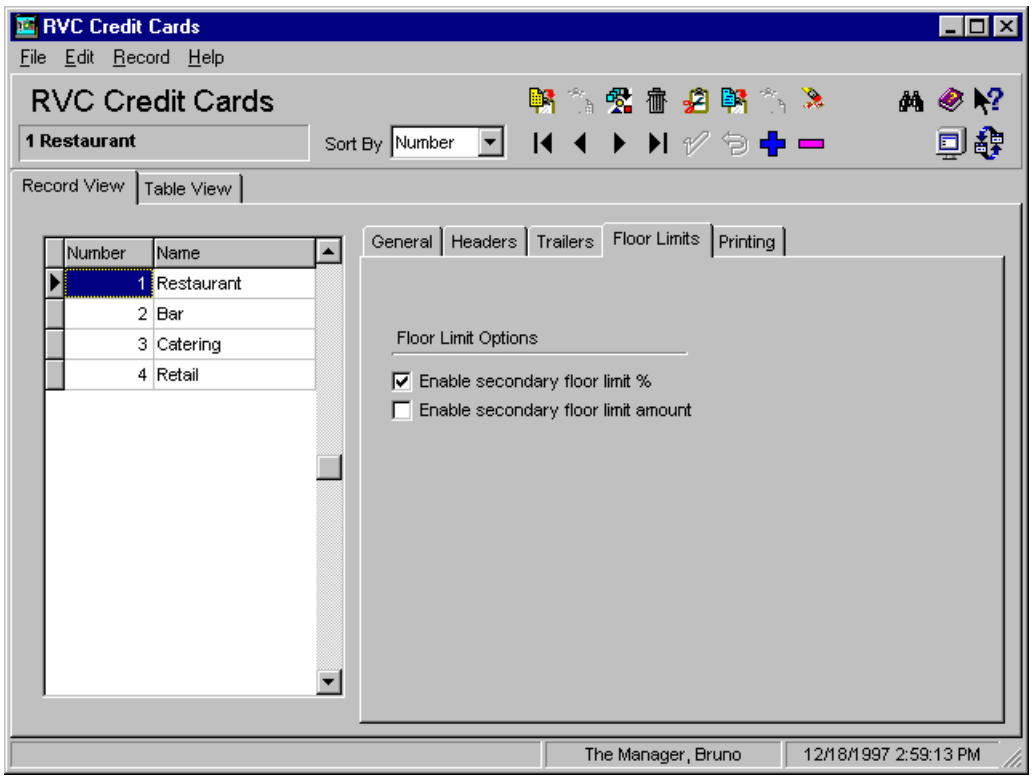


Example
The example below shows the credit card trailer for the Restaurant revenue center. Trailers are programmed in Sales | Descriptors.

```
Tip:_____________________________

Total:___________________________


_________________________________
Signature

Thanks for dining with us!
```

Floor Limits

Enable the secondary floor limits for each revenue center.



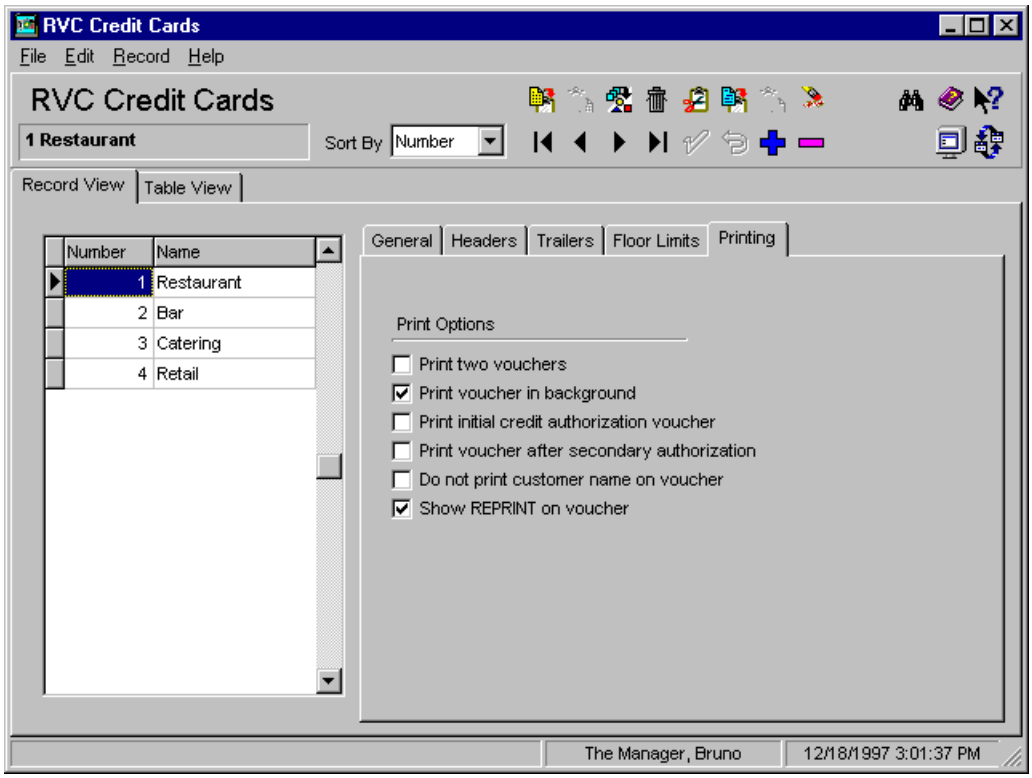
Example
The Restaurant revenue center enables a secondary floor limit to control when a second request for authorization is initiated. In this example, a second authorization is requested anytime the service total reaches 10% more than the initial authorization amount. Floor limits are established in Sales | Tender/Media (Credit Auth tab).

Note

Some credit card processors require authorization of all transactions regardless of the amount.

Printing

Select options to control the printing of credit card vouchers in each revenue center.



Example

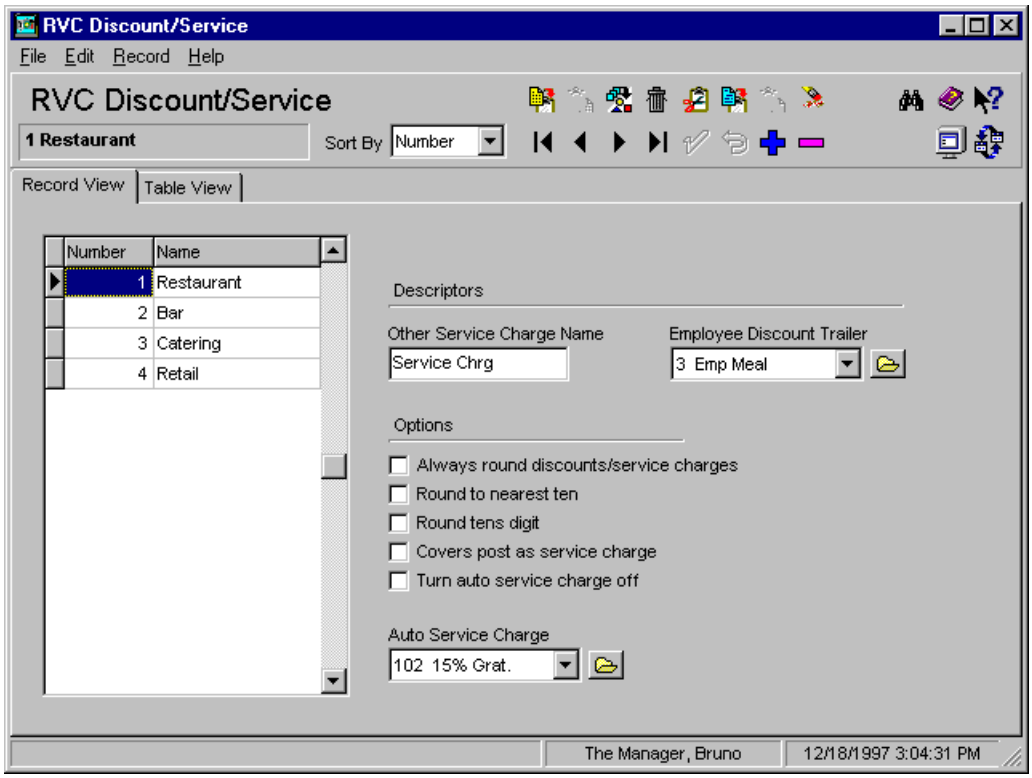
This restaurant selects the option *Print voucher in background* to cause a credit card voucher to print automatically when authorization is received. This feature is used with the Suspend /Resume feature of the 3700 system. For more information about the Suspend/Resume feature, see the *3700 Feature Reference Manual.*

RVC Discount / Service

Discounts and Service Charges may be controlled at the revenue center level.

Programming

Select discount and service charge options for each revenue center.



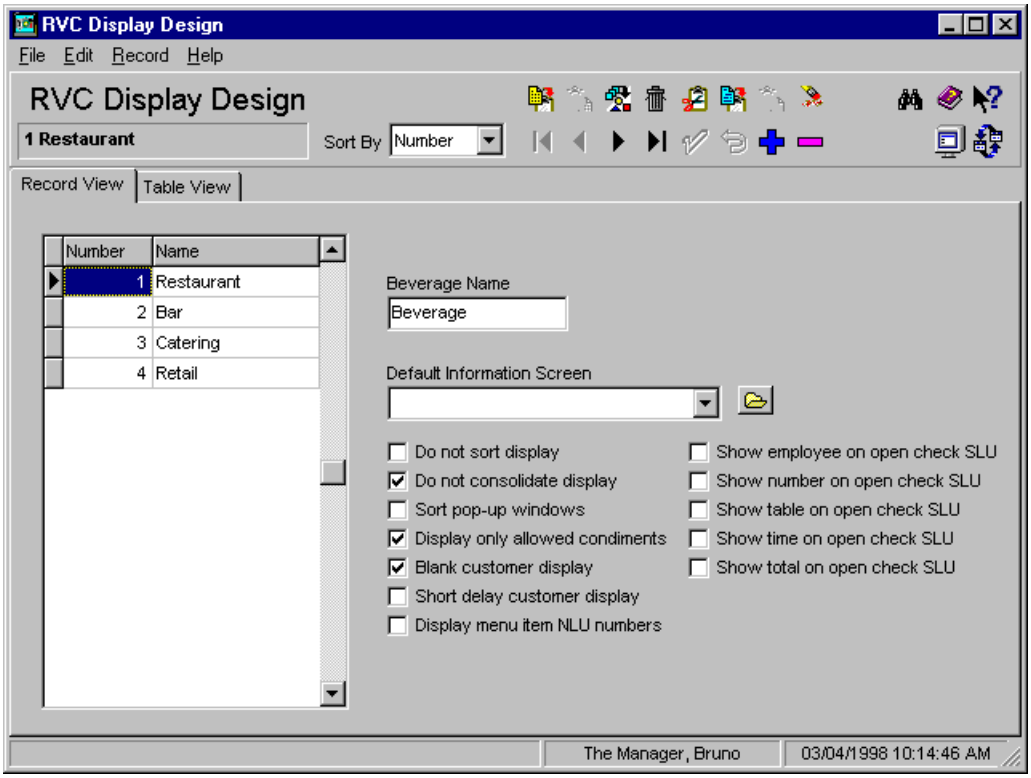
Example
This revenue center charges a 15% autogratuity on every check. This service charge is created in the Sales | Discount/Service form.

RVC Display Design

The options in RVC Display Design allow you to control the display in each revenue center. For example, you can control the sorting and consolidation of items posted in a previous round for each revenue center.

Programming

Select the display options for each revenue center.



Example
This restaurant uses the term “Beverage” to display with the Beverage Control prompt in the Restaurant. They might choose “Drinks” to display in the Bar. For more information about Beverage Control, see the *3700 Feature Reference Manual*.

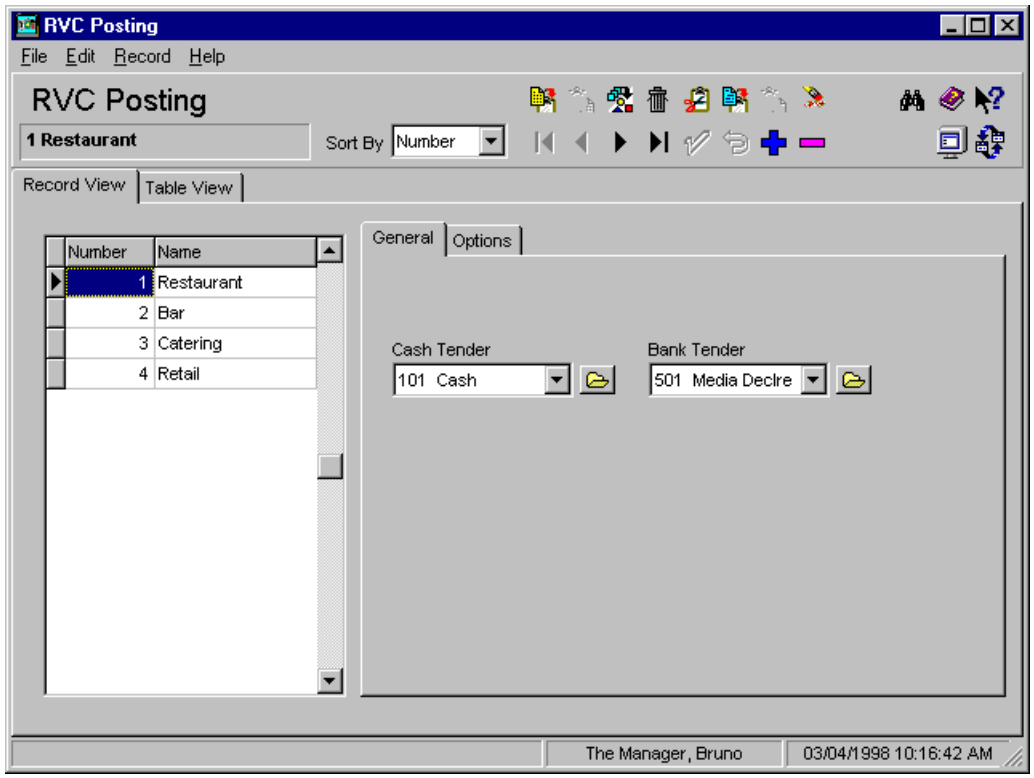
RVC Posting

Use the RVC Posting form to select the keys to which cash and bank tenders should post, and choose the number of days of check detail to store. Other posting options that can be determined at the revenue center level include rounding, posting to transaction or check employee, and order type totals posting options.

Programming

General

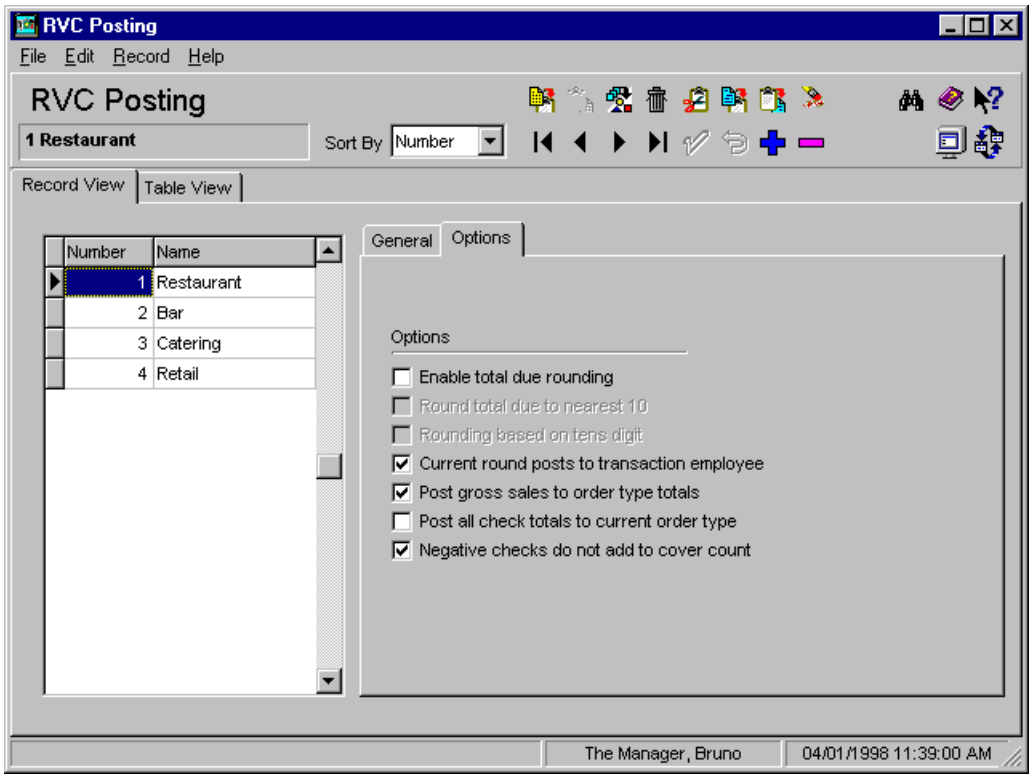
Select separate posting options for each revenue center.



Example
This restaurant uses a key named “Cash” to record change due amounts and Tips Paid regardless of which tender key is used to perform the action.

Options

Select totals and rounding options for each revenue center.



Example

In this restaurant, the host seats the guests and begins a check before the waiter or waitress is assigned (the host is the check employee.) The restaurant selects the option *Current round posts to transaction employee* to track the revenue generated by each waiter or waitress. Otherwise totals in this restaurant would only post to the host.

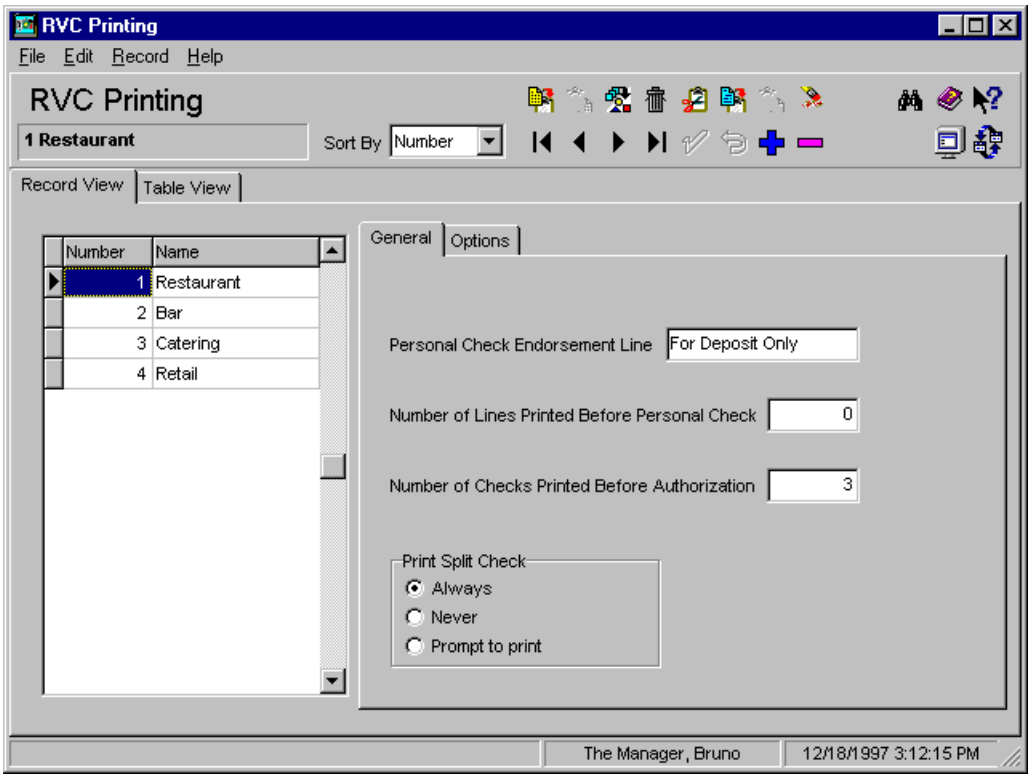
RVC Printing

Use the Revenue Center Printing form to customize check operations and printing in each revenue center.

Programming

General

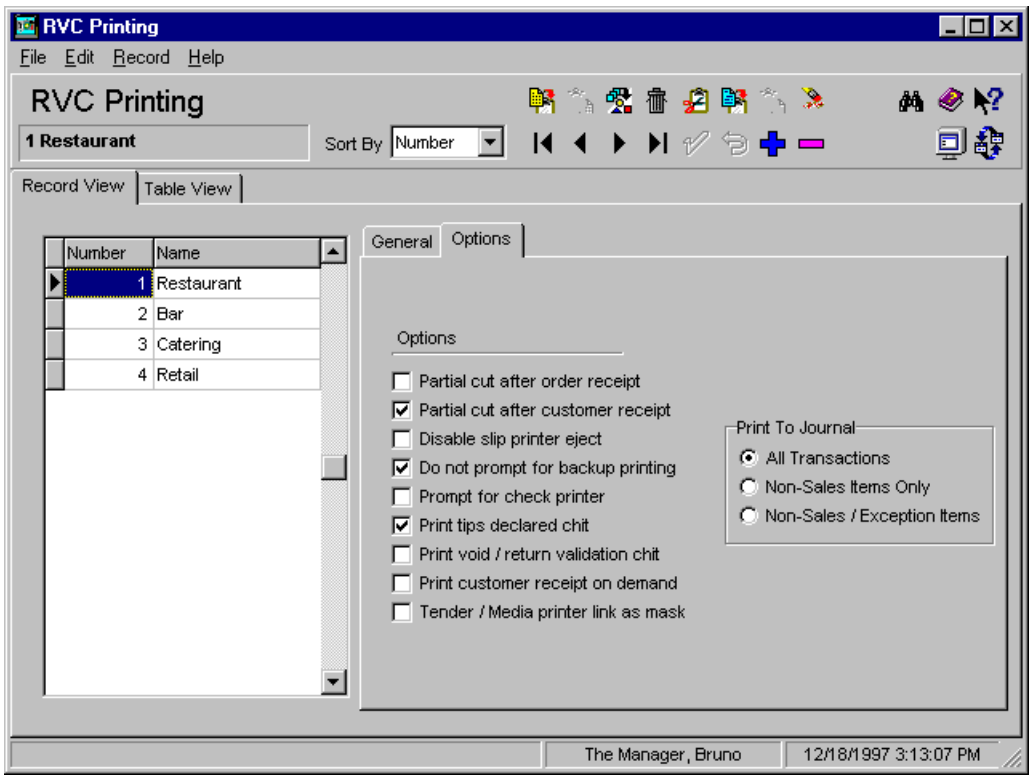
Complete the fields to control printing in each revenue center.



Example
The Restaurant revenue center is programmed to allow three checks to print before authorization is required. The Bar however, only allows one check to print before authorization since more supervision is desired in the Bar environment.

Options

Select the desired printing options for each revenue center.



Example

This restaurant selects the option *Partial cut after customer receipt*, to keep receipts printed near the door to the restaurant from blowing away.

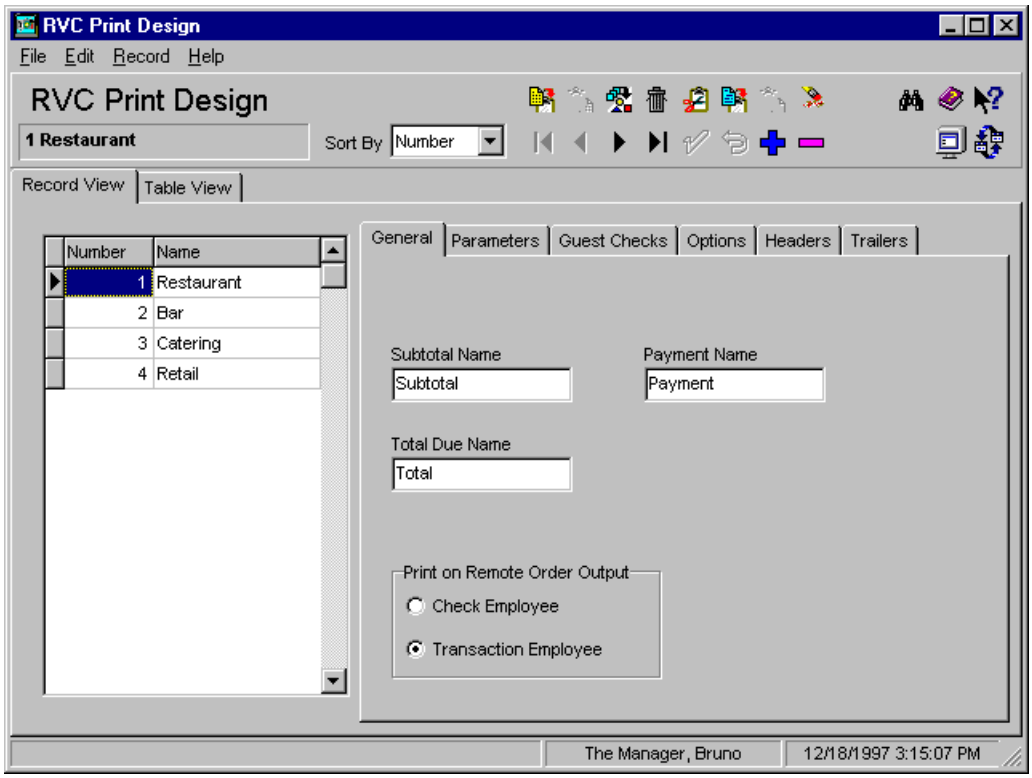
RVC Print Design

Use this form to design a different look for receipts and guest checks in each revenue center.

Programming

General

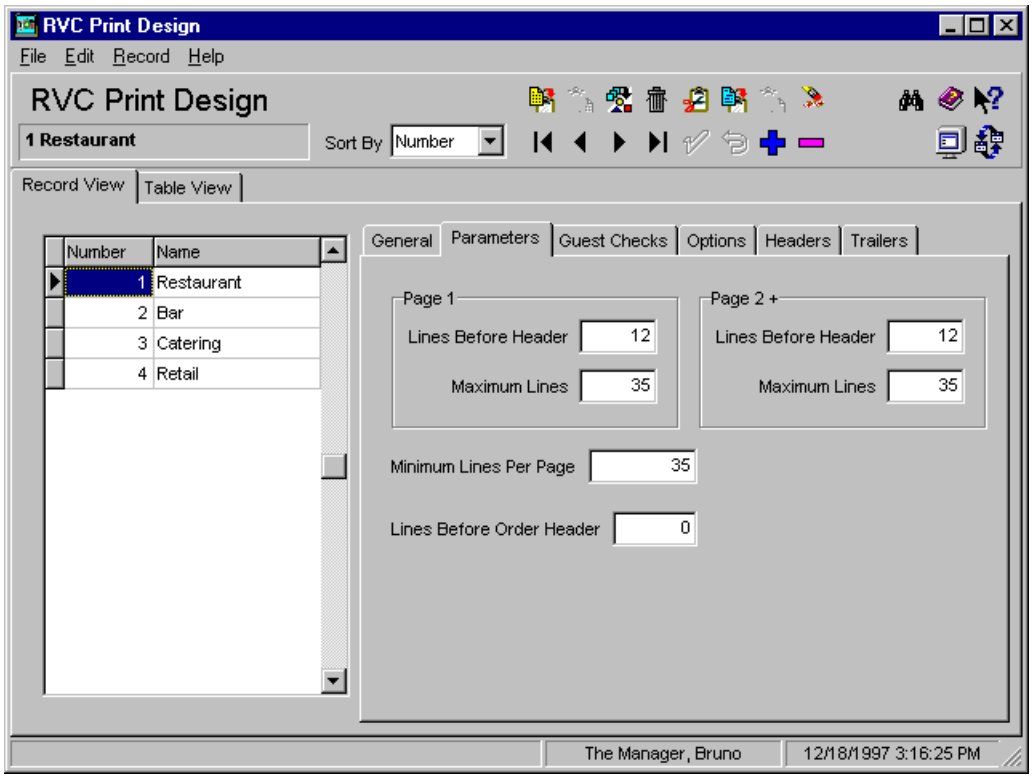
Enter the names to print on guest checks, customer receipts, and order output for each revenue center.



Example
This revenue center uses the word “Subtotal” on guest checks and receipts.

Parameters

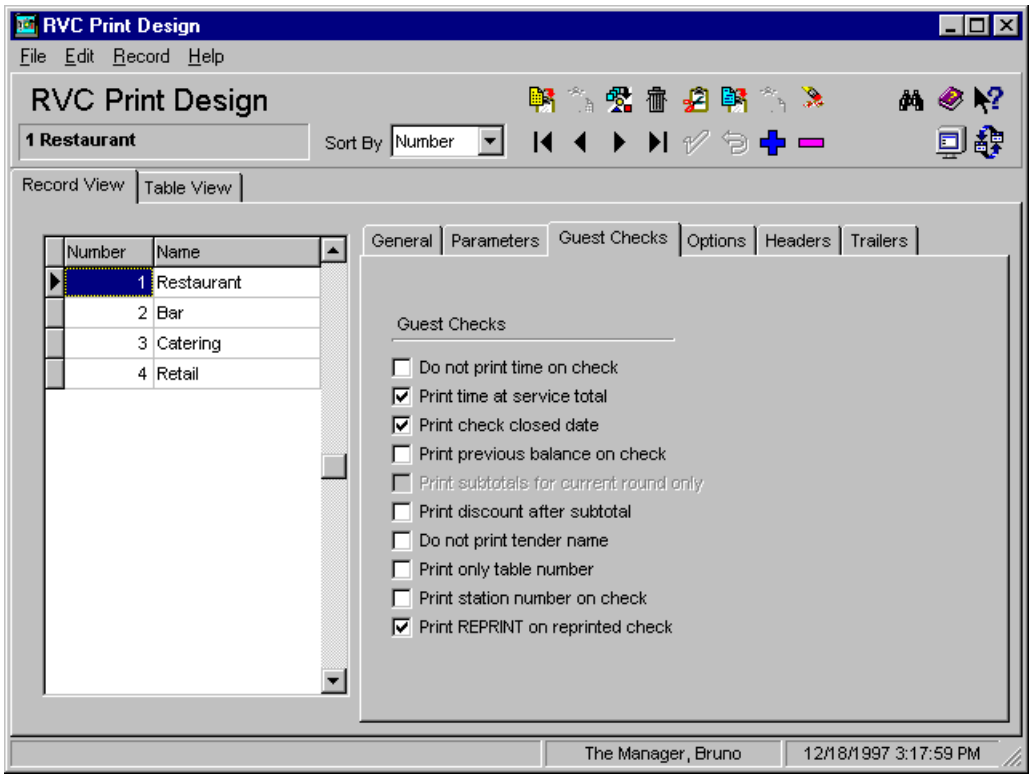
Enter the number of lines needed to control the length of customer receipts in each revenue center.



Example
The Restaurant uses a guest check that includes a pre-printed logo. By entering 12 in the *Lines before header* field, the guest check begins printing below the logo. (Micros slip printers print 6 lines per inch.)

Guest Checks

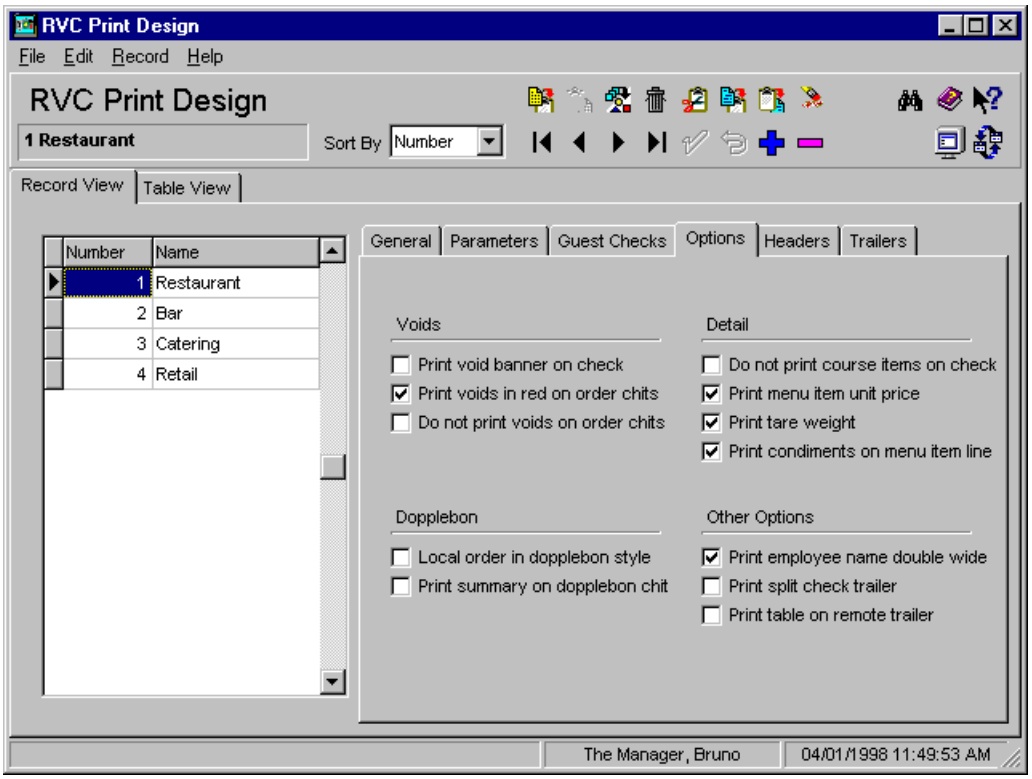
Select options to determine what prints on guest checks in each revenue center.



Example
Guest checks in the Bar revenue center include the time and date.

Options

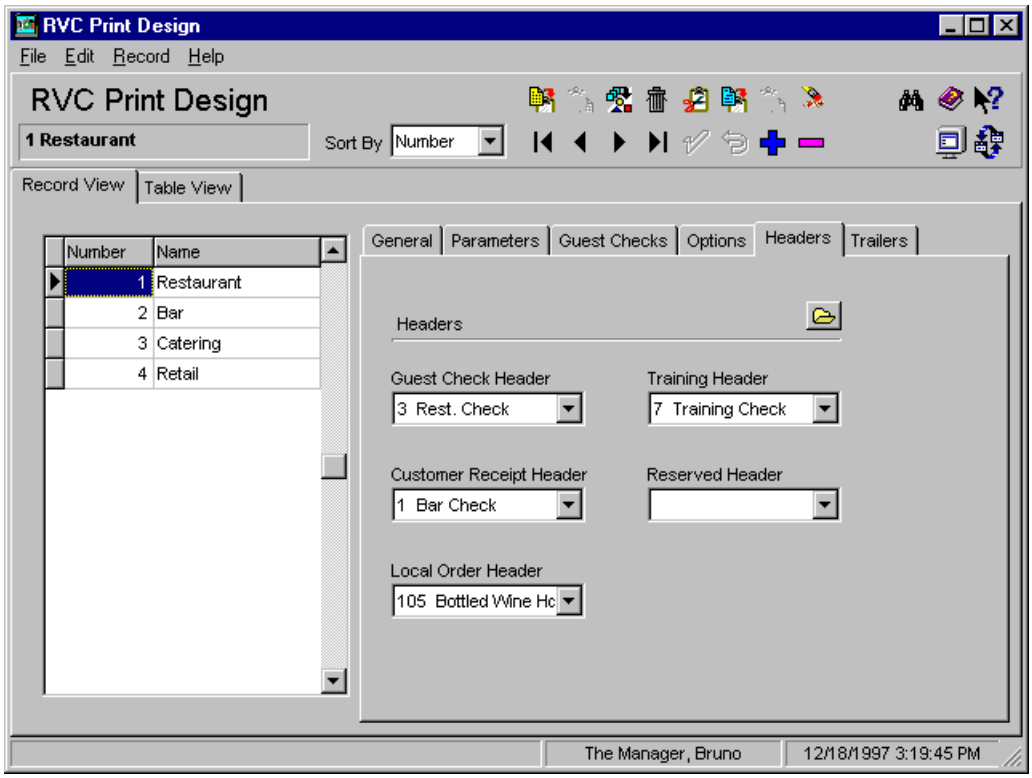
Select options to control the printing of checks and order chits in each revenue center.



Example
In the Restaurant revenue center, voids print in red on order chits to alert kitchen employees not to prepare the item.

Headers and Trailers

Select a different header and/or trailer to print on guest checks, customer receipts, and local orders in each revenue center.



Example
In this restaurant, checks printed in the Bar revenue center display a different name than checks printed in the Restaurant revenue center.

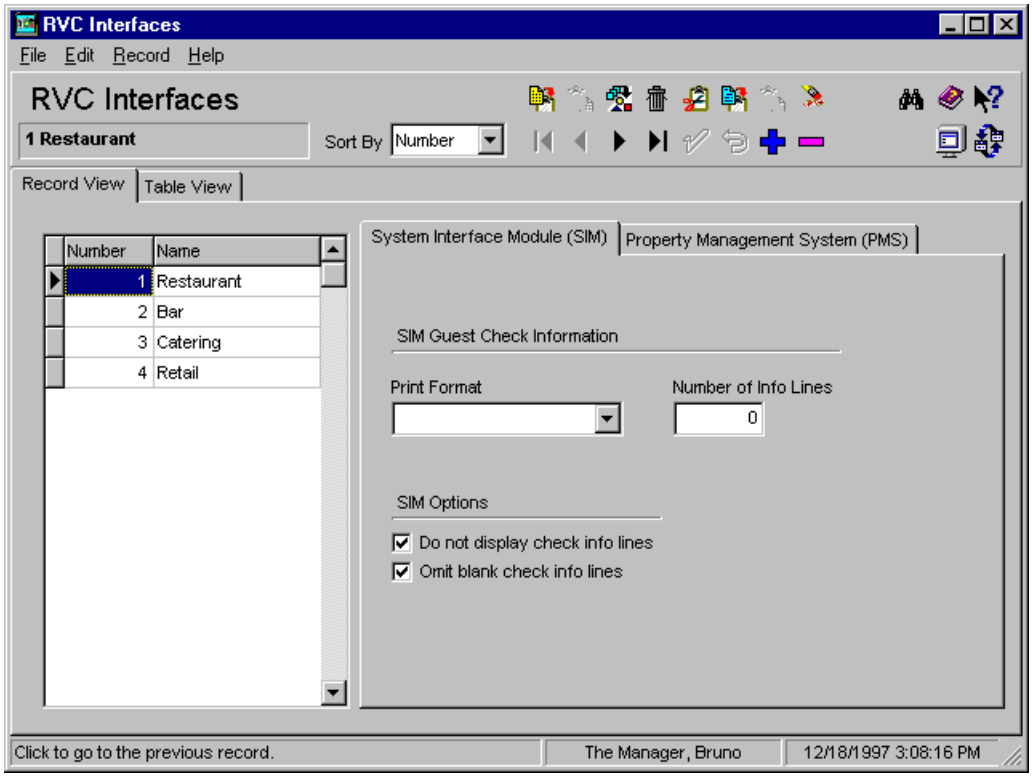
RVC Interfaces

Use the RVC Interface folder to identify the PMS (Property Management System) and SIM (System Interface Module) configuration on a Revenue Center basis.

Programming

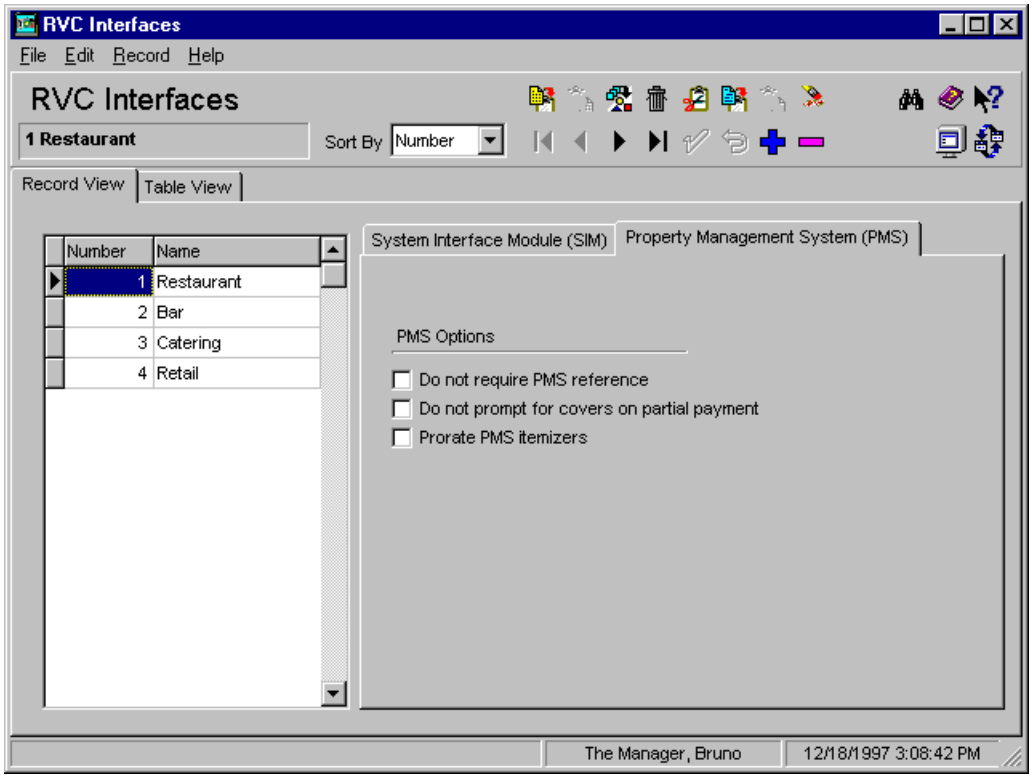
SIM

Select the display options for each revenue center.



PMS

Select the display options for each revenue center.

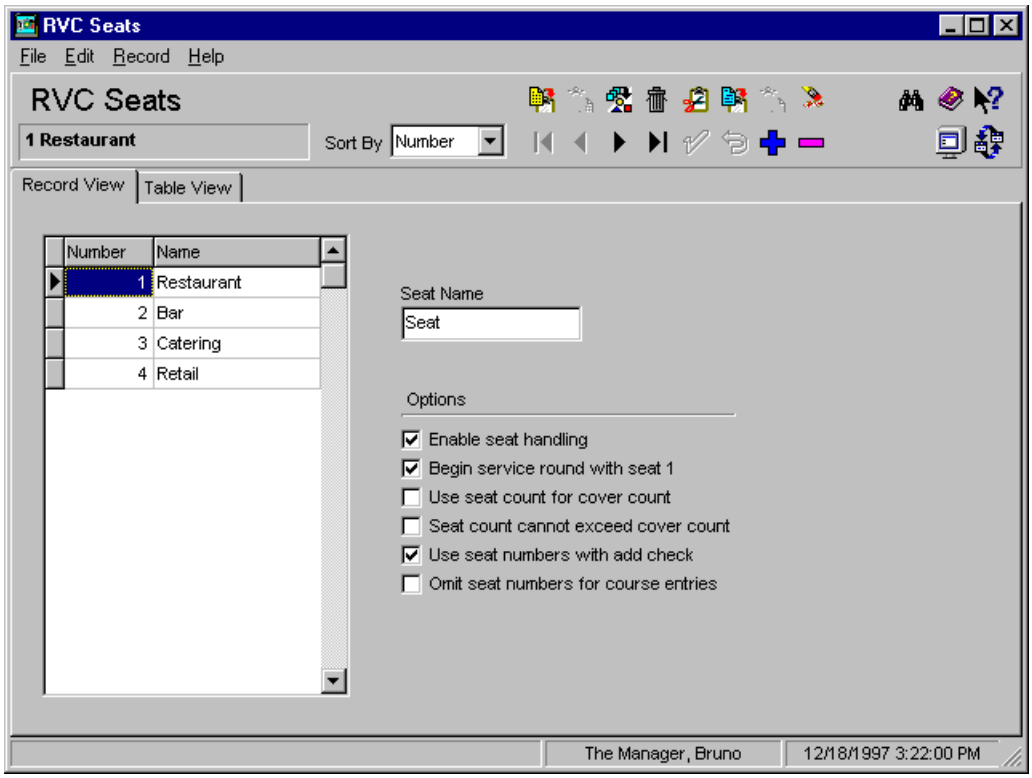


RVC Seats

Use the RVC Seats form to control the operation of the Seats feature in each revenue center.

Programming

Enable seat handling in appropriate revenue centers.



Example
This restaurant has four revenue centers: Bar, Restaurant, Catering and Retail. Seats are enabled only in the Restaurant and Bar.

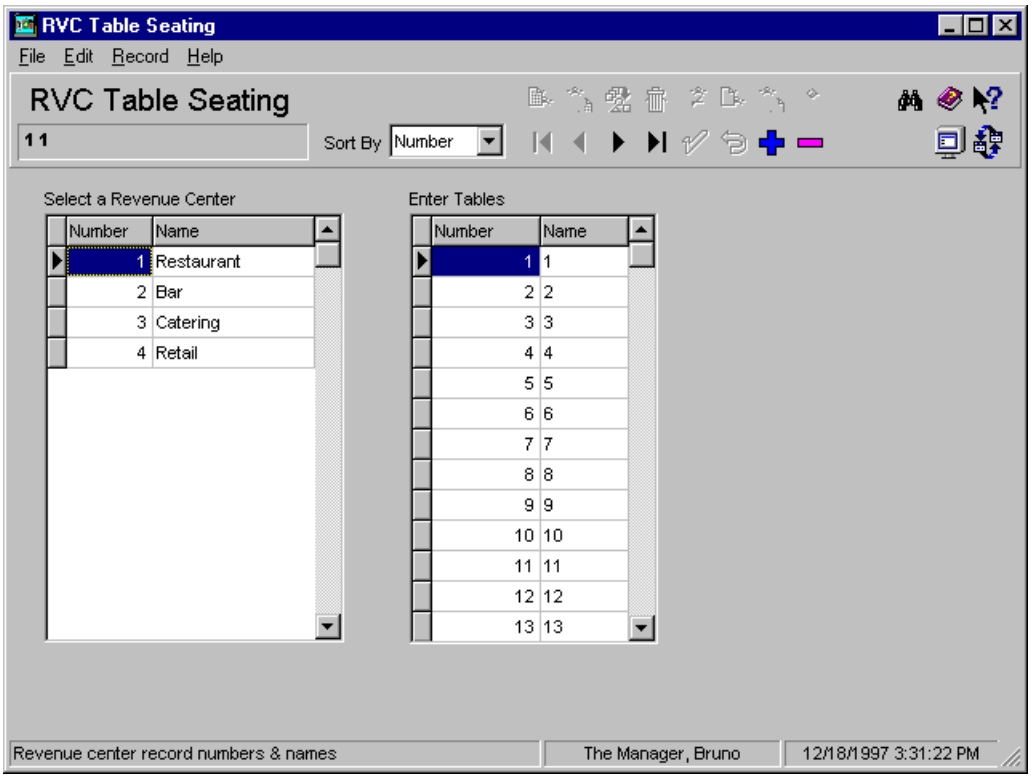
RVC Table Seating

Use the RVC Table Seating form to define service points in the in each revenue center. Usually, the point of service is a table, but a “table” can be any conveniently defined point or area of service.

Table Names
A table names can be any 4 alphanumeric characters. Table names need not be in any particular order. Different revenue centers can assign the same table names without affecting system-wide table counts, providing that each table in the system has a unique table record number. Within a revenue center, however, if checks are to be begun, picked up, or transferred by table number, every table must be given a unique name.

Programming

Create records for the tables in each revenue center.



Example
The Restaurant revenue center has tables numbered 1 through 50.

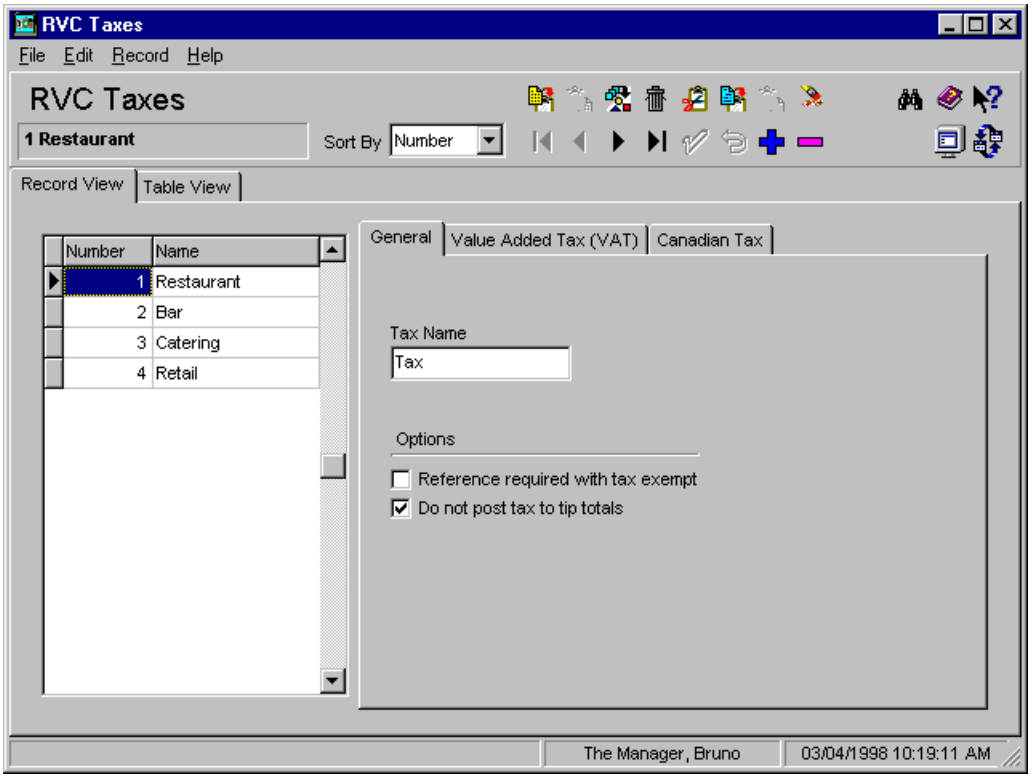
RVC Taxes

Use the RVC Taxes form to customize tax operations in each revenue center.

Programming

General

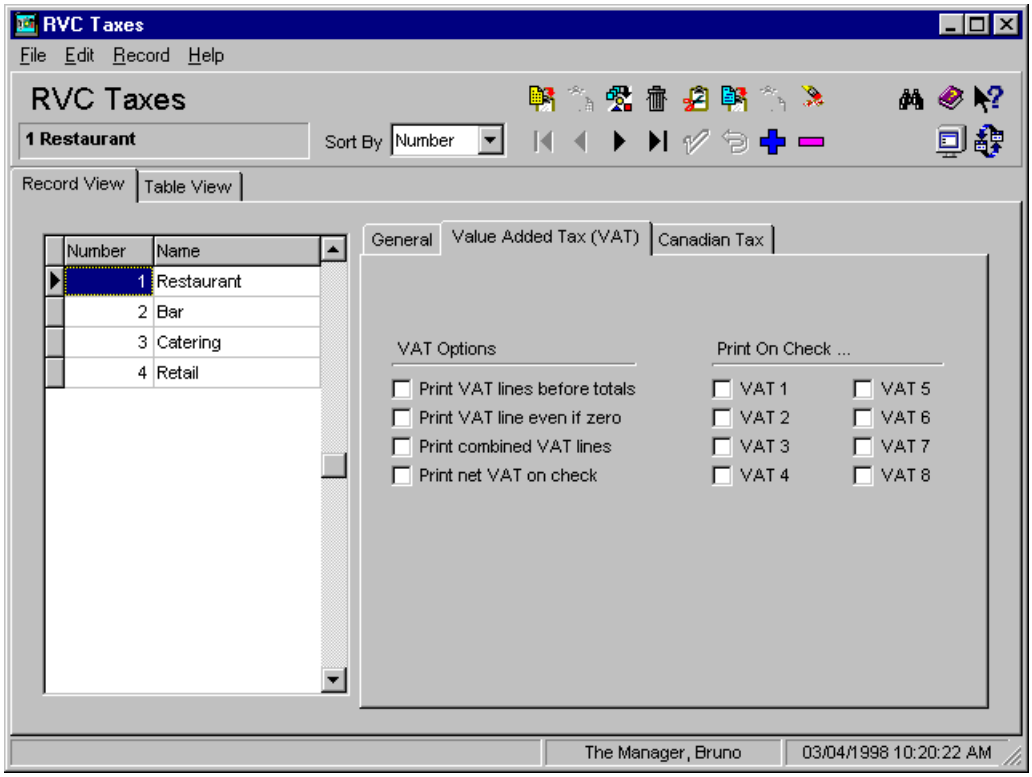
Define the tax options for each revenue center.



Example
In the Restaurant revenue center the phrase that prints on customer receipts and guest checks is “Tax.”

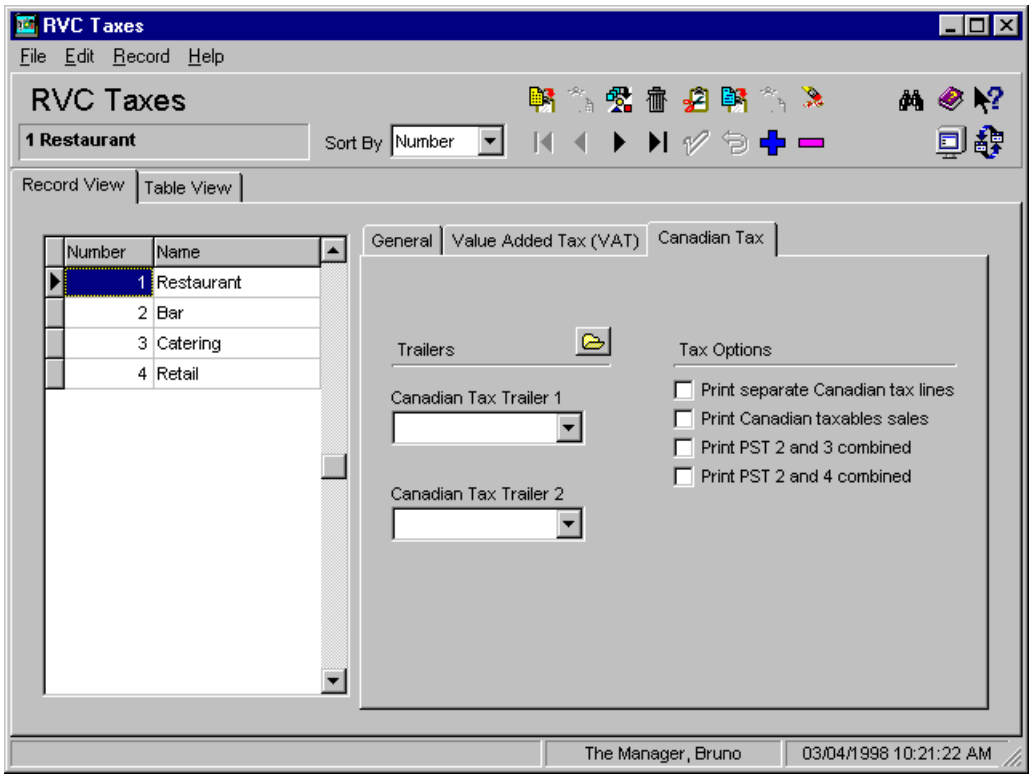
Value Added Tax (VAT)

Select options that affect how Value Added Taxes (VAT) print on guest checks in each revenue center. VAT is a form of sales tax used outside the United States.



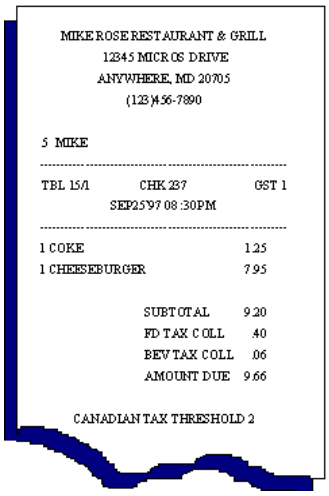
Canadian Tax

Configure the Canadian tax printing options for each revenue center.



Example

The example below shows how tax lines print when the option *Print separate Canadian tax lines* is selected.



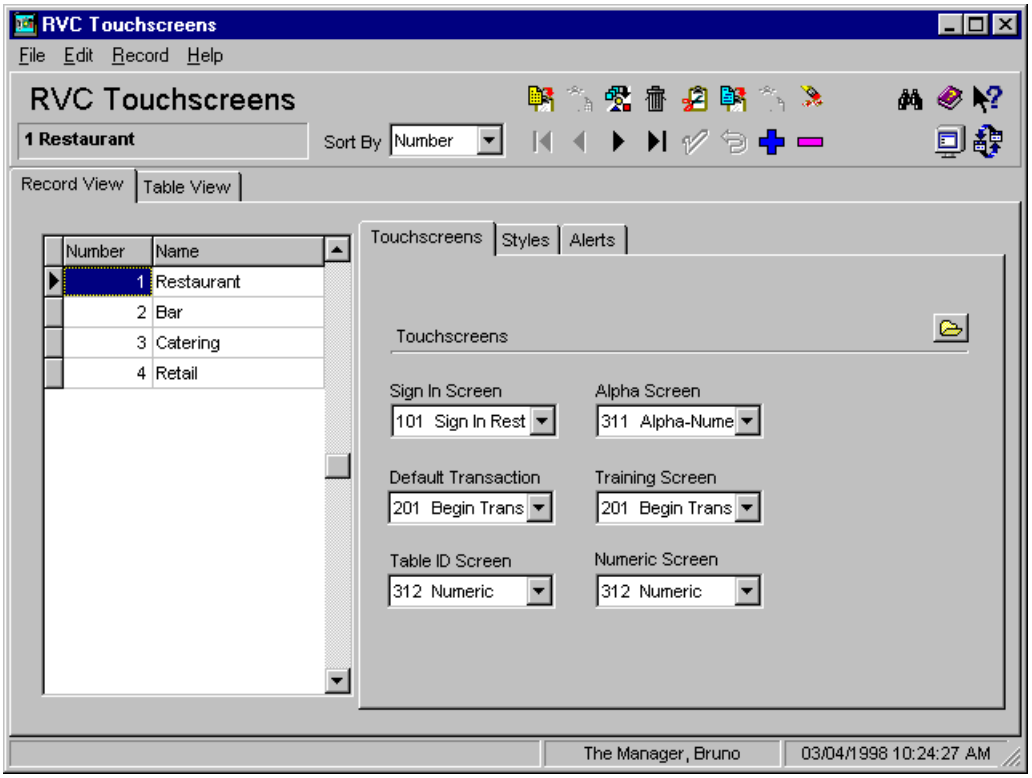
RVC Touchscreens

Use the RVC Touchscreens form to customize touchscreen displays in each revenue center.

Programming

Touchscreens

Select the touchscreens to display in each revenue center.

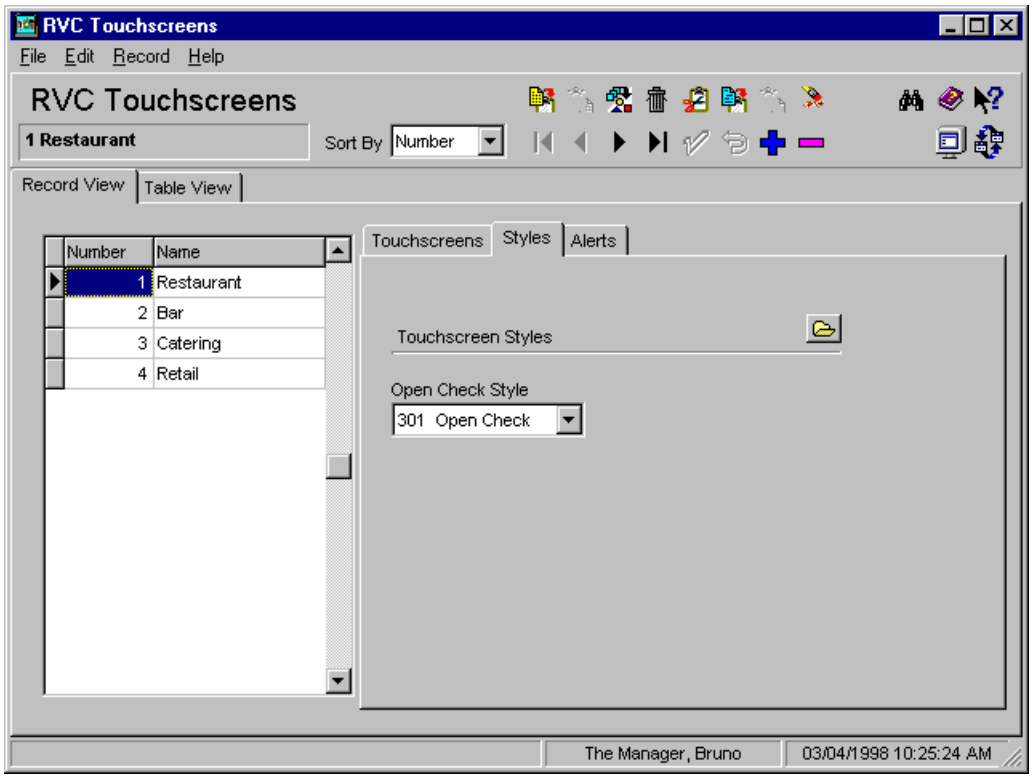


Example

For example, the sign in screen displayed in the Restaurant revenue center may differ from the one displayed in the Bar. Use the folder link to open the Touchscreens form if you need to create more touchscreens.

Styles

Choose a style to display open checks when an employee presses the [Pick Up Check] or [Transfer key]. You can select a different style in each revenue center for splitting checks, editing seats, and sharing checks.

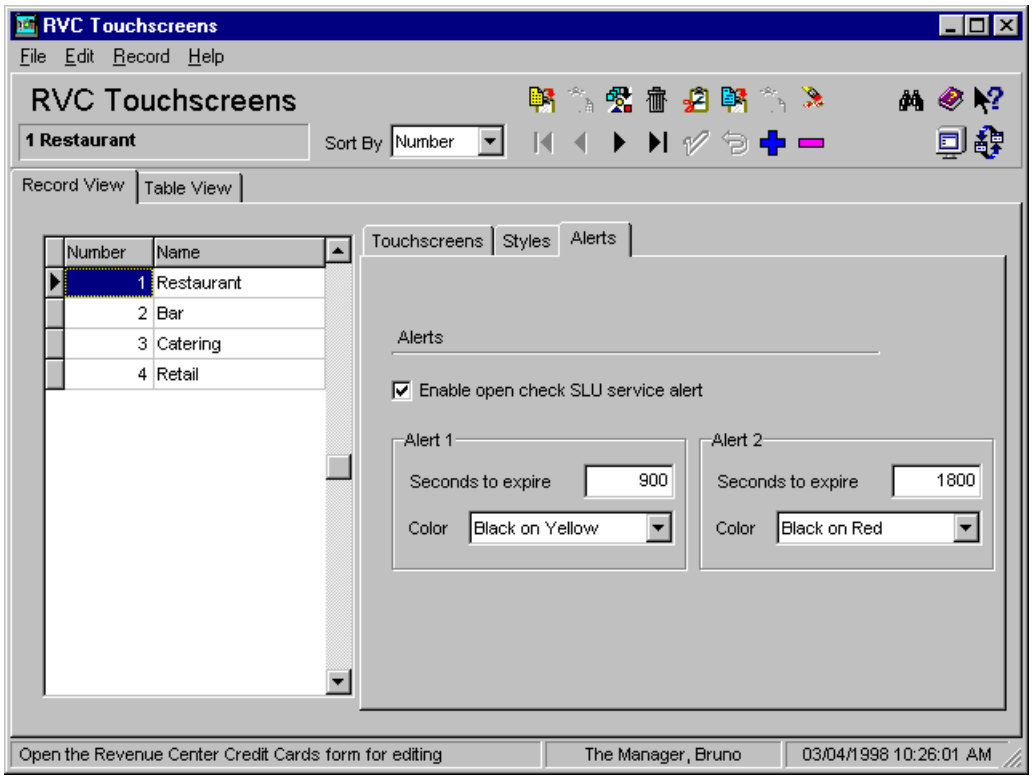


Example

A restaurant might design more than one style for the keys that display when the [Pickup Check] key is pressed. For example, the Restaurant revenue center, with 50 tables, might use smaller keys to display open checks than the Bar revenue center that has only 10 tables.

Alerts

Enable alerts in the appropriate revenue centers.



Example
Alert times in the Restaurant are set for 900 and 1800 seconds.

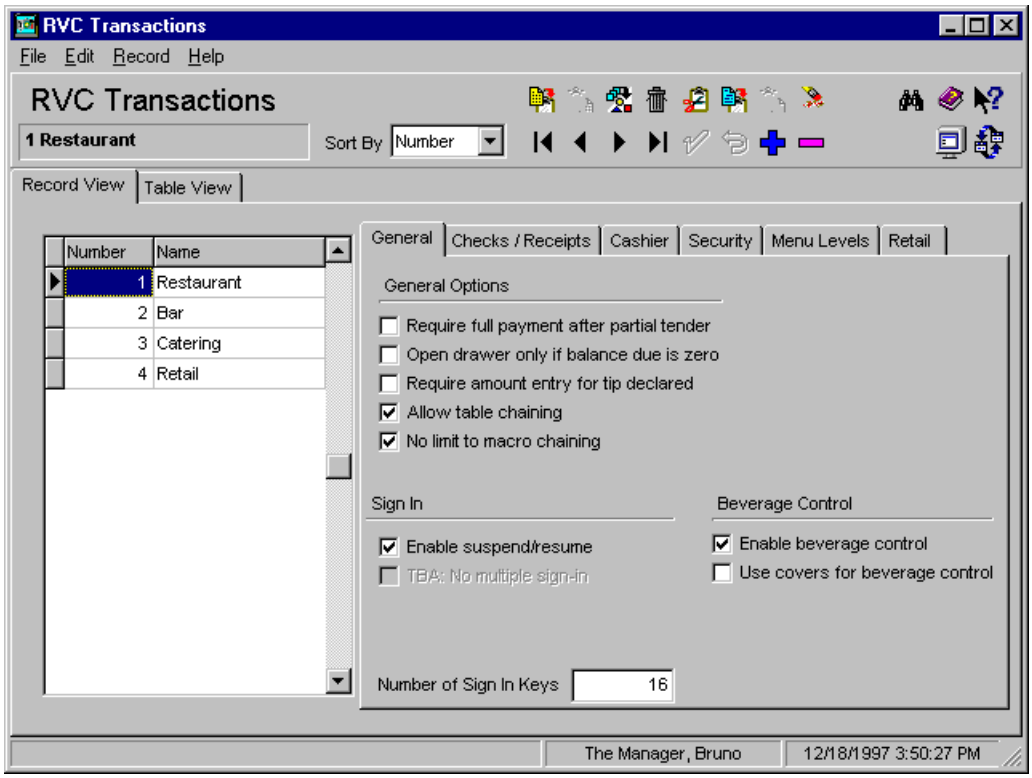
RVC Transactions

Use the RVC Transactions form to customize the options that control the operation of the 3700 system for each revenue center.

Programming

General

Select the options for each revenue center.

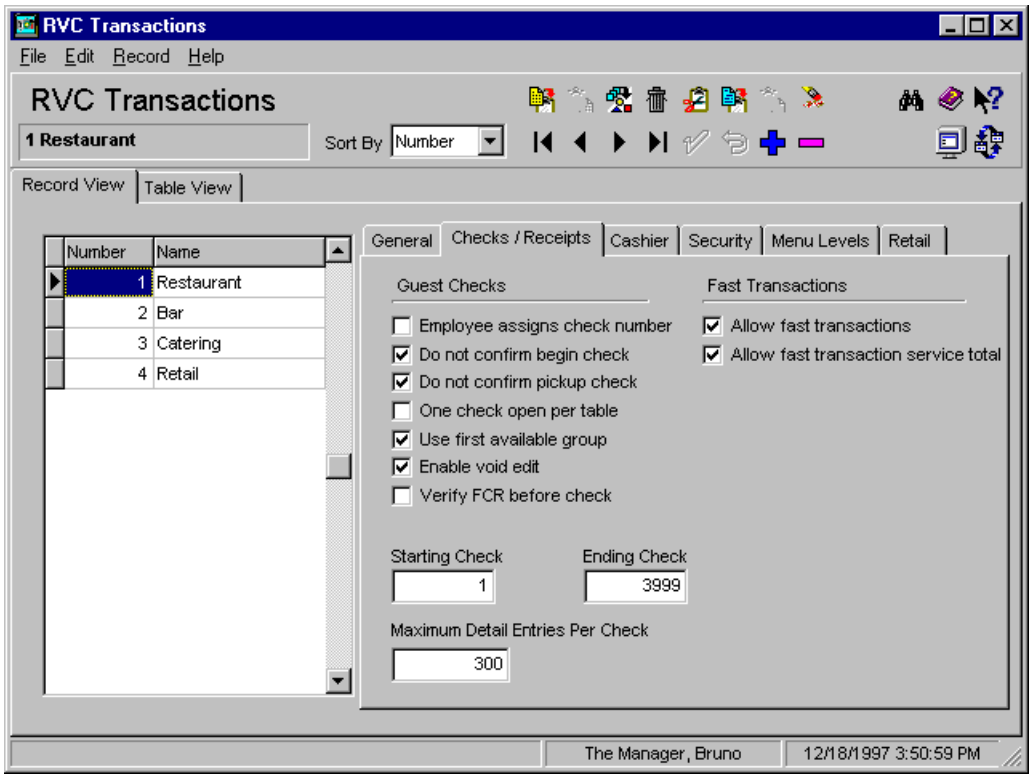


Example

This restaurant often serves large groups. The option *Allow table chaining* is selected to allow employees to Chain and Fire orders at multiple tables. This ensures that the customers in a group receive their food at the same time. Chain and Fire Tender Media keys are required with this option. Refer to the *3700 Feature Reference Manual* for more information on Chain and Fire.

Checks / Receipts

Select options to control check and receipt handling in each revenue center.

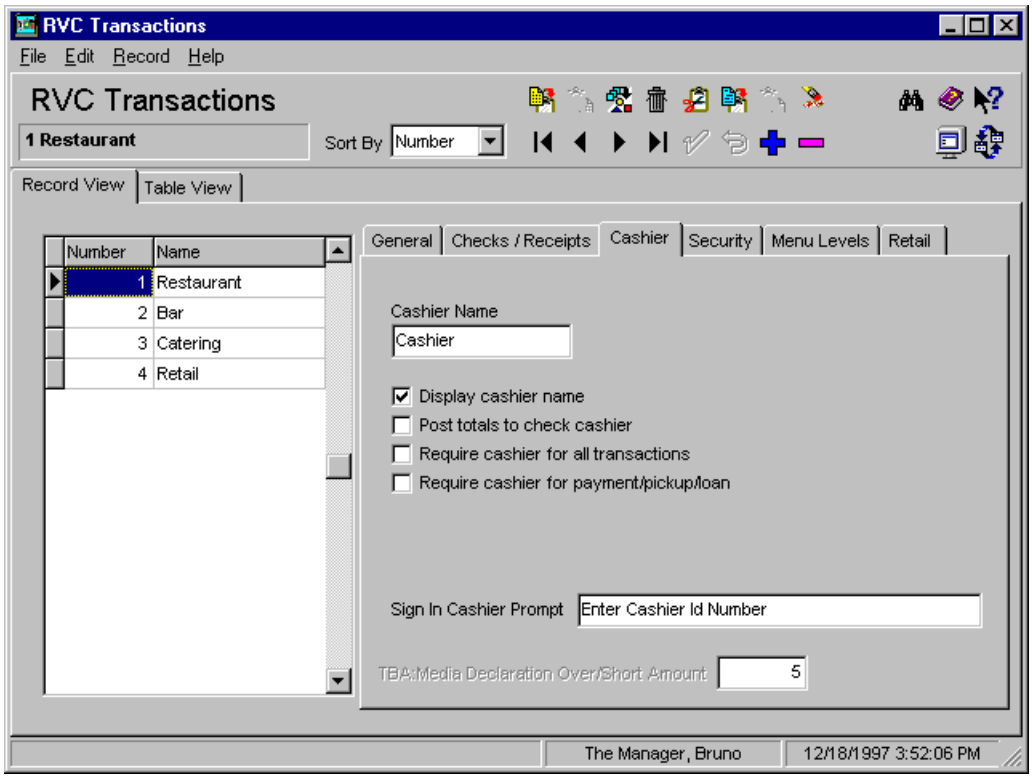


Example

In the Bar, *Allow fast transactions* enables employees to begin a check by pressing a menu item key. This allows for faster service in this revenue center.

Cashier

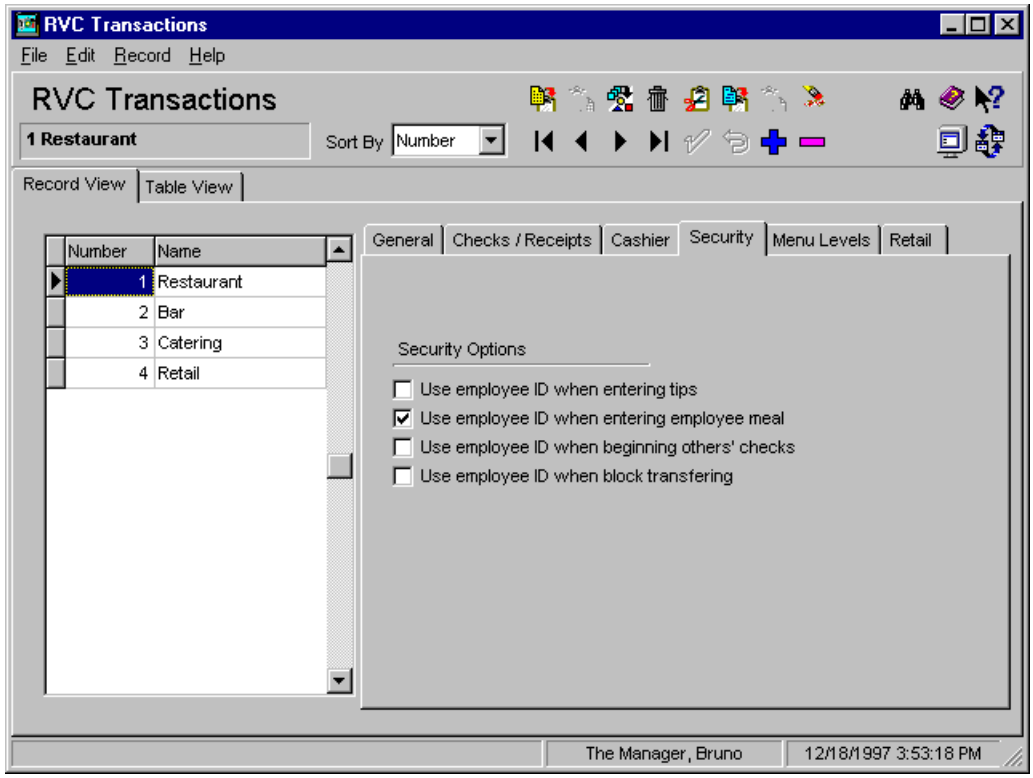
Select the options that control cashiering in each revenue center.



Example
For example if you enter “Cashier” in the *Cashier Name* field the prompt “ENTER CASHIER ID NUMBER” displays.

Security

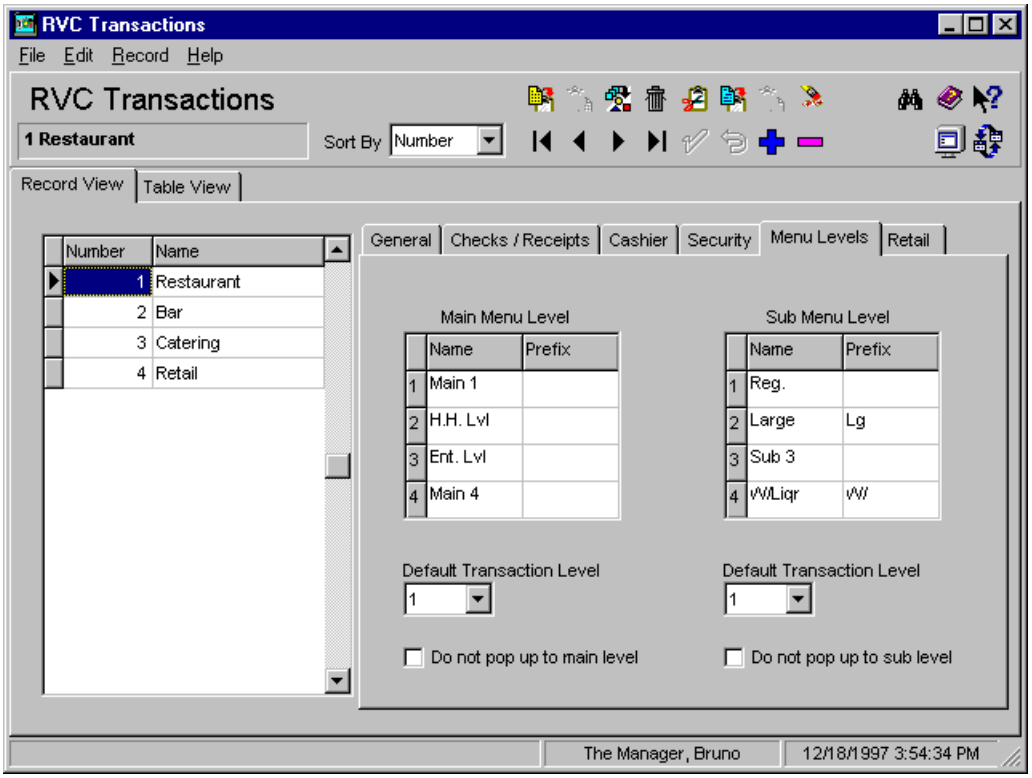
Select the security options required by each revenue center.



Example
This restaurant wants to be sure employee meals are charged to the correct employee. The option *Use employee ID when entering employee meal*, adds an additional layer of security. The employee ID is entered in the *ID* field of the Employees form.

Menu Levels

Select a default menu level for each revenue center.



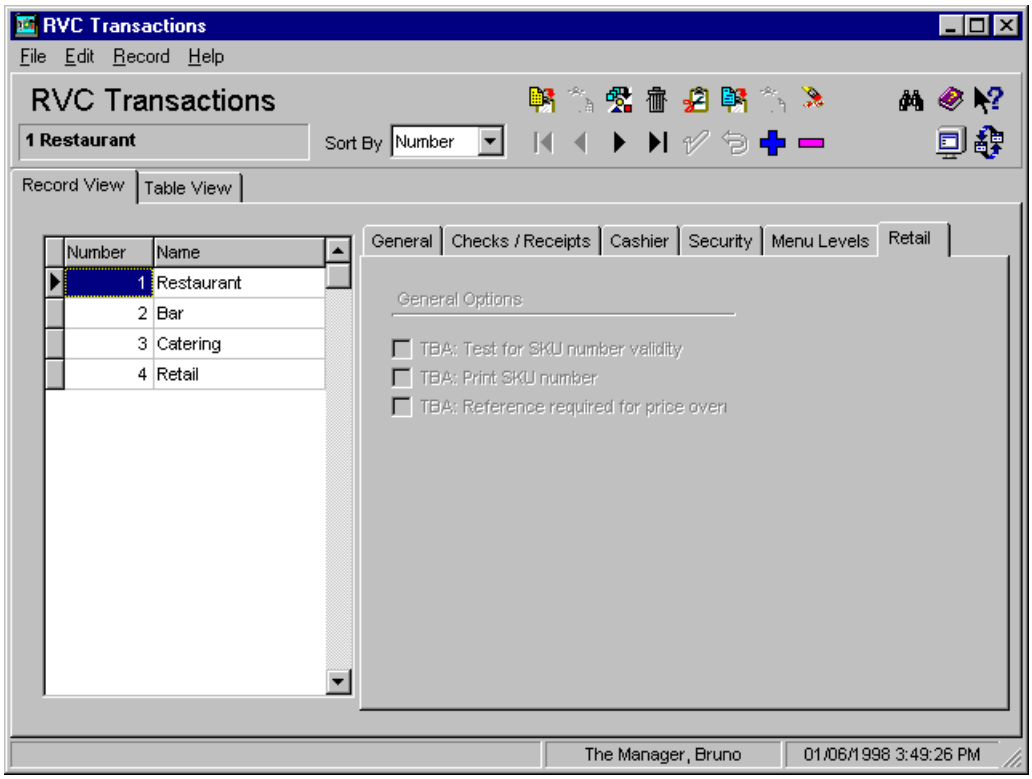
Example
In the Bar, when a customer orders a large drink, the price is drawn from Sub Menu Level 3 and the prefix “LG” prints and displays in front of the menu item.

Note

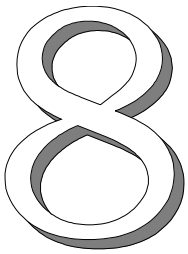
A menu level “pops up” when it returns to the default menu level after a transaction such as a service total.

Retail

The Retail options will be available in a later version.



Chapter



Employees

Use the Employees folder to program information about a restaurant's employees and schedule.

In this chapter

Overview 8-2
Employee Classes 8-3
Configurator Access 8-11
Jobs 8-12
Employees 8-14
Time and Attendance 8-18
Time Clock Schedule 8-22

Overview

Use this folder to create Employee Classes to control privileges, and to enter individual employee information. If you are using the Time and Attendance feature, you'll assign job codes and program the Time and Attendance and Time Clock Schedule forms. Before you begin to enter information about individual employees, use the forms provided with the *3700 Site Survey* to organize the information.

Program the forms in this folder in the following order:

1. Employee Classes
2. Configurator Access
3. Jobs
4. Employees
5. Time and Attendance (Optional)
6. Time Clock Schedule (Optional)

Employee Classes

Employee Classes allow you to:

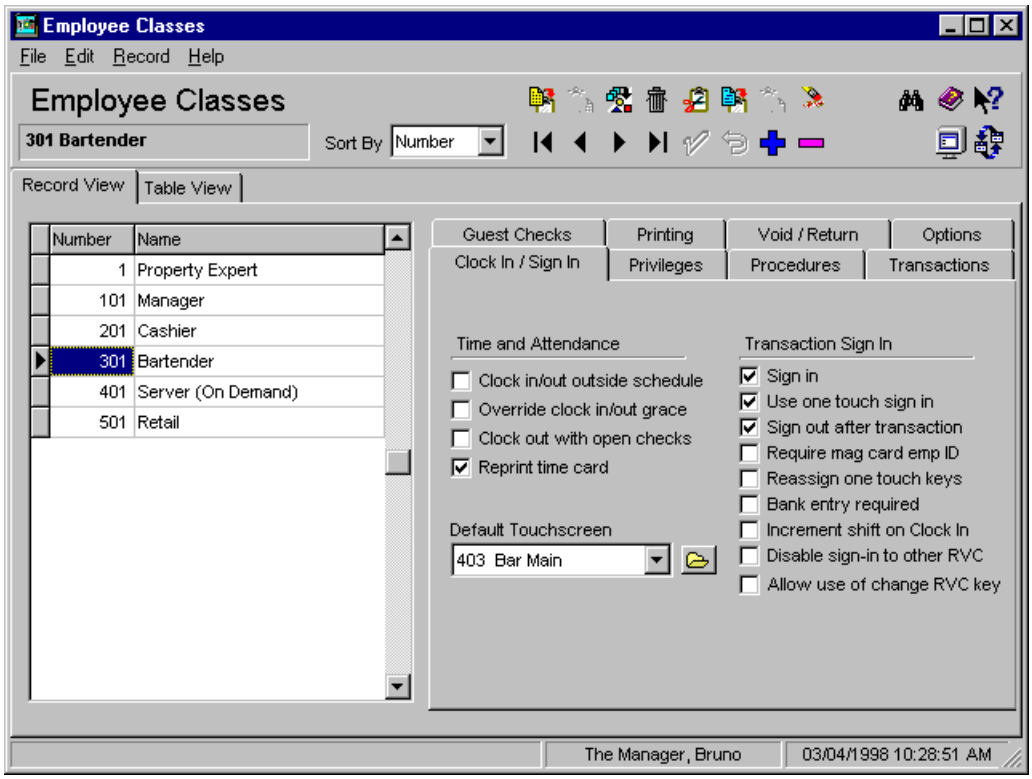
- ❑ Generate reports for specific kinds of employees
- ❑ Simplify programming by assigning the same privilege and option settings to all employees in a class

Organize employees according to the duties that they perform most often, and then by privileges. Assign each division in duties or privileges to a separate Employee Class.

Programming

Clock In / Sign In

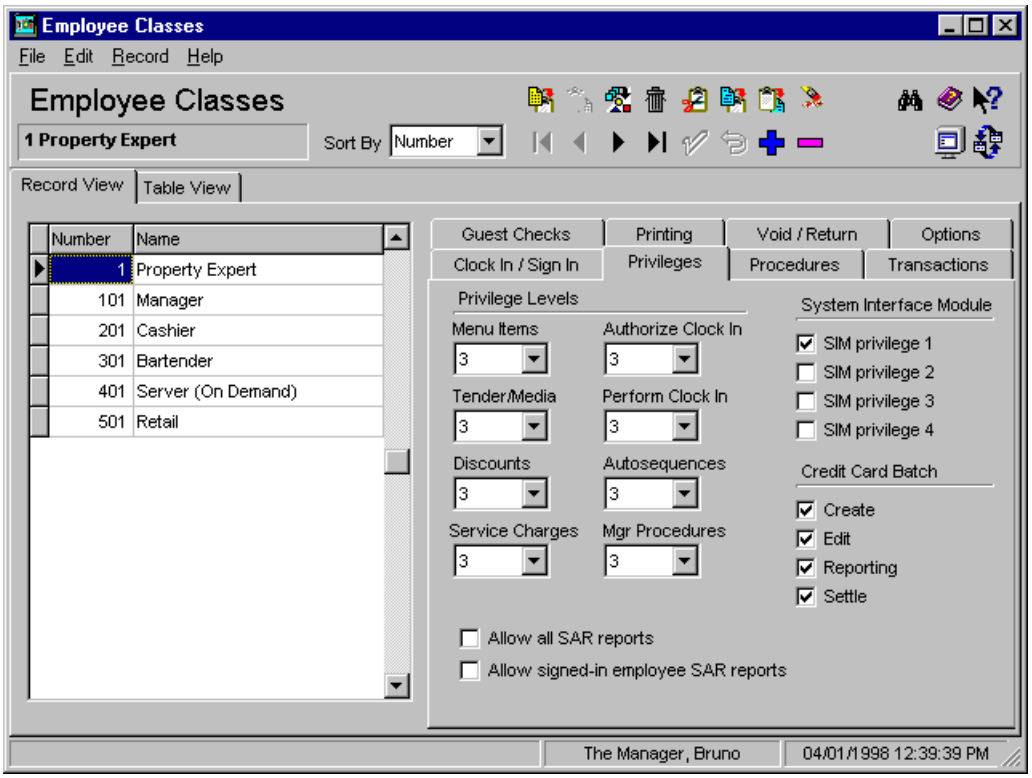
Create the Employee Classes required by this restaurant and assign privileges related to Time and Attendance and Sign In.



Example
In this restaurant, the employee class, Bartenders, is privileged to use one-touch sign in keys. The default touchscreen (Bar Main) is programmed to display two one-touch keys, one for each bartender on duty.

Privileges

Select the privileges for each employee class.

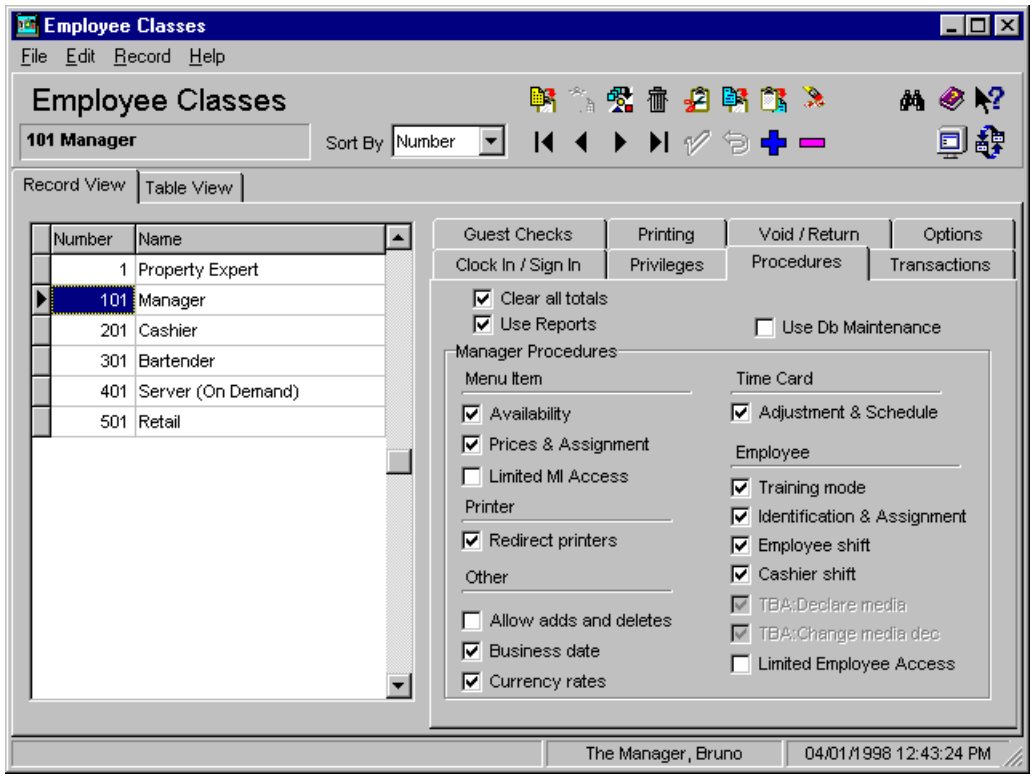


Example
The Managers in this restaurant are privileged to create and settle credit card batches, as well as to edit and report on credit card batches. The table below shows the privilege hierarchy in the 3700 system.

Privilege Level	
3	Highest - Managers, Property Experts
2	High - Assistant Managers, Head Waiters, Hosts
1	Low - Kitchen Staff, Bus Persons
0	No restrictions - access to this key or operation is not restricted

Procedures

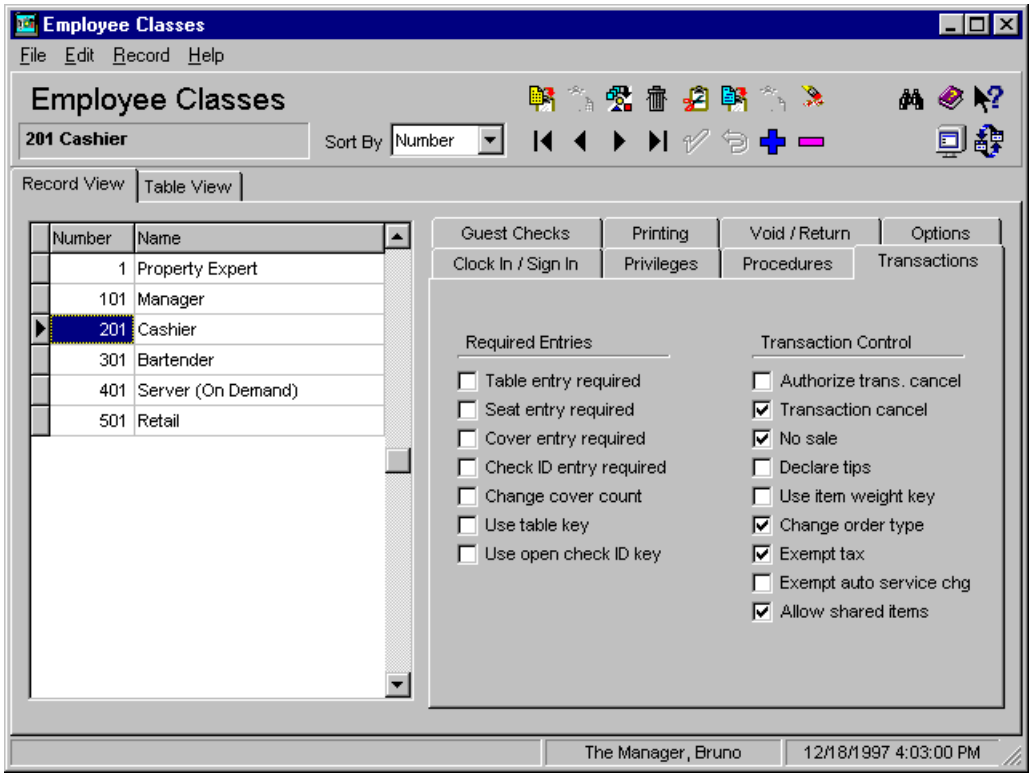
Select the procedures that each employee class may perform.



Example
In this restaurant, Managers often redirect printer output during slow periods when two order output devices are not needed.

Transactions

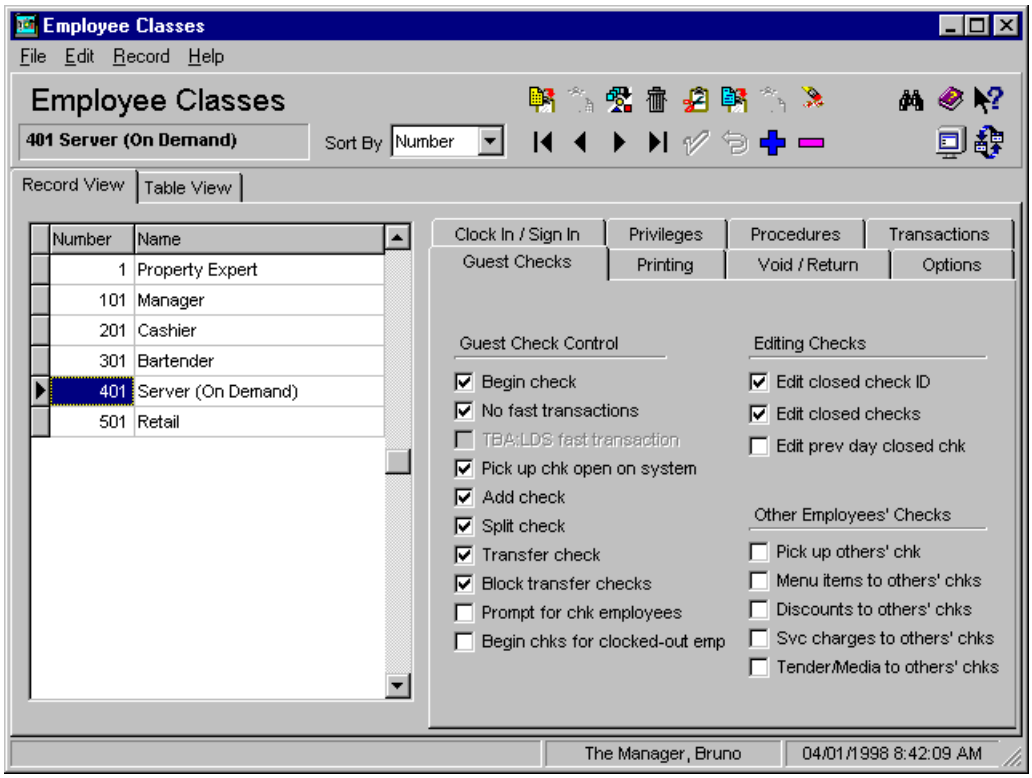
Select the options that control the transactions each employee class may perform.



Example
In this restaurant cashiers are privileged to use the [No Sale] key in order to make change for the jukebox.

Guest Checks

Assign privileges involving checks to the appropriate employee classes.

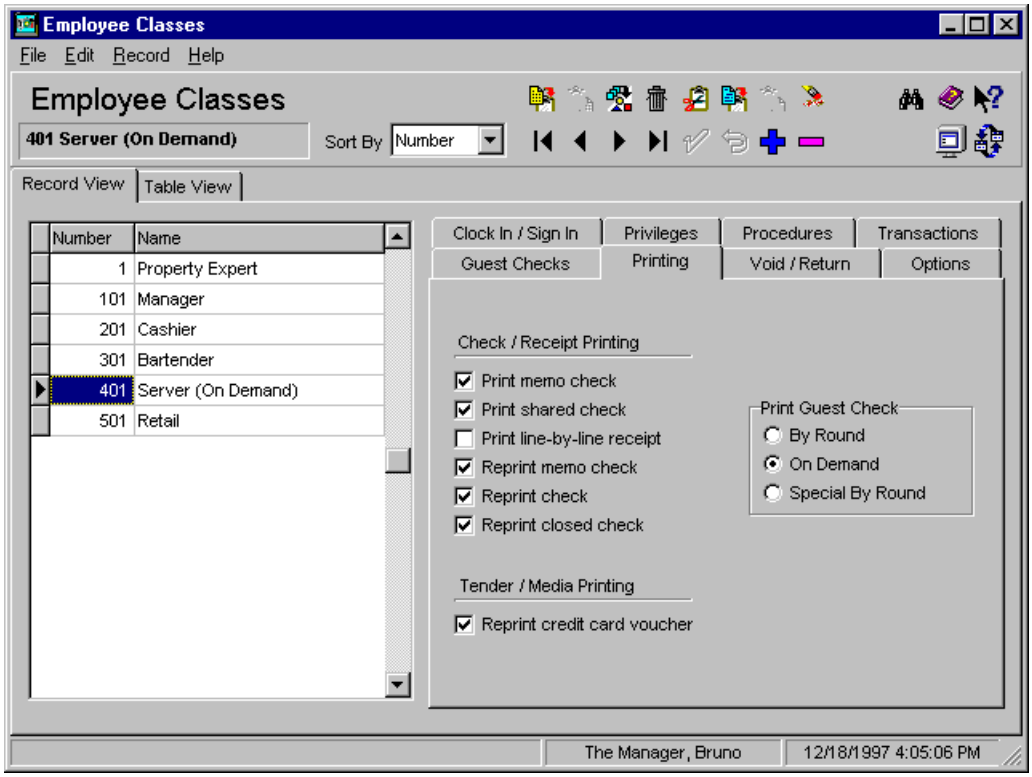


Example

In this restaurant, the options *Pickup check* and *Begin check* are selected for servers. Other options, such as *Pick up others' check*, are reserved for managers and cashiers. Remember, if you do not assign a privilege to an employee class, employees may only perform the operation by obtaining authorization.

Printing

Select the options that control printing for each employee class.

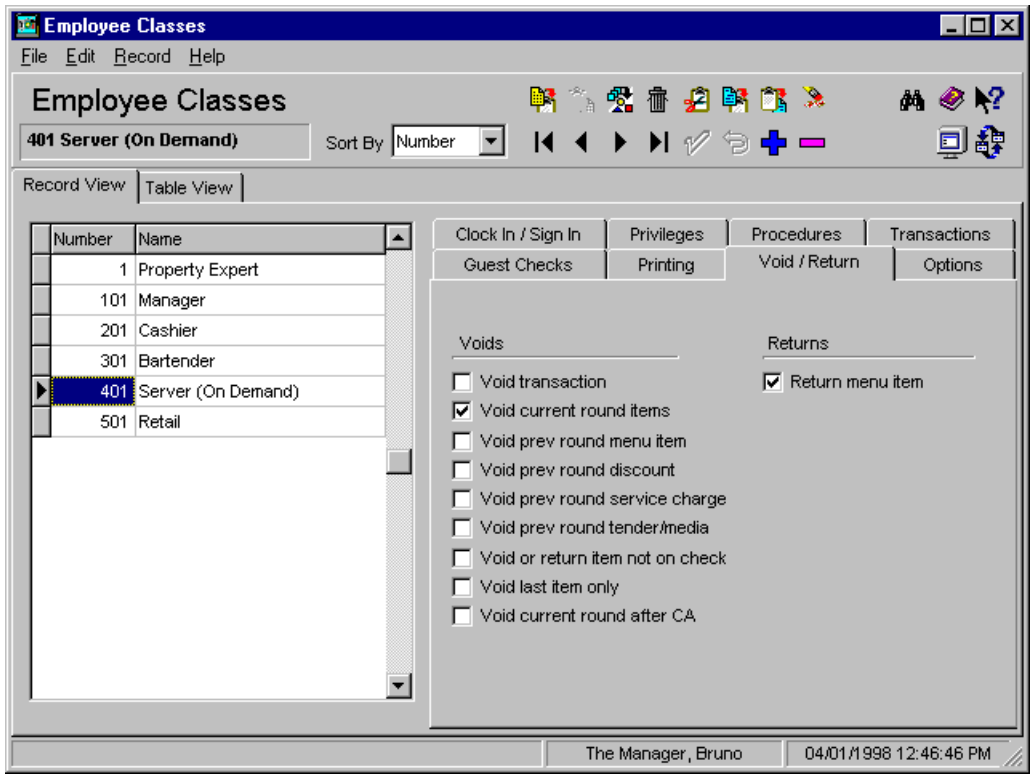


Example

In this restaurant, servers print checks when the customer requests one (on demand). A [Print Check] key is programmed on the touchscreen.

Void / Return

Select the void and return privileges for each employee class.



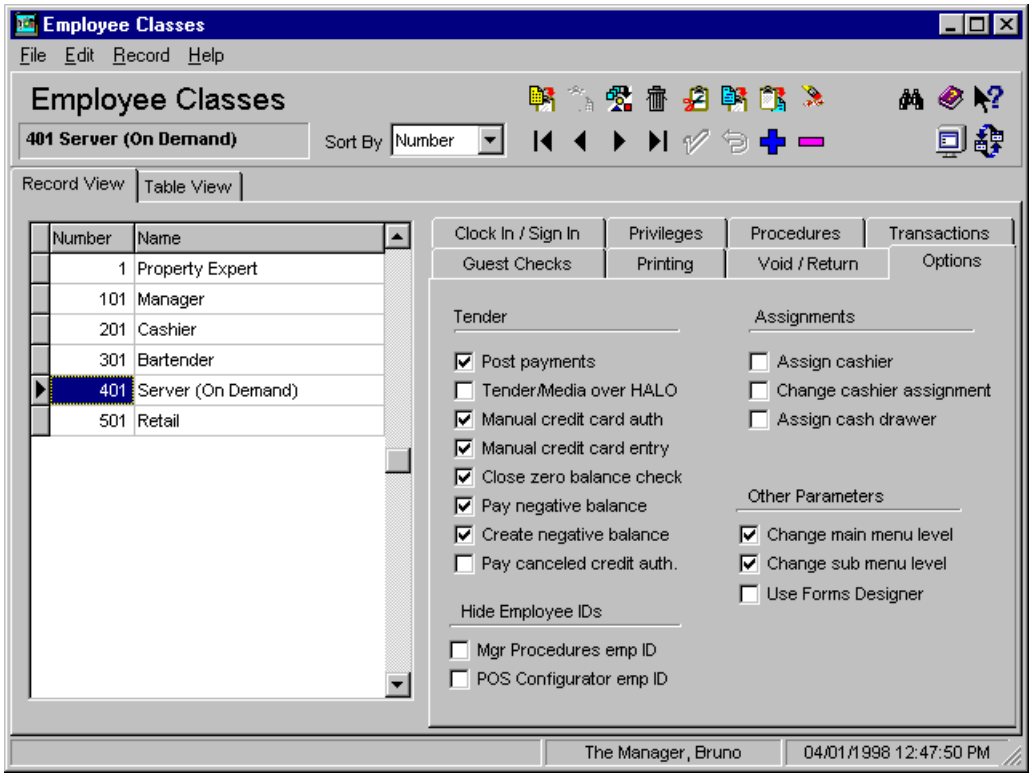
Example
Servers in this restaurant may void only current round menu items. The privilege of voiding previous round menu items is reserved for management.

Note

Voids and returns can be programmed to require a reason. See "Reasons" on page 5-9.

Options

Assign privileges to each employee class to control tendering, cashier and cash drawer assignment, and menu level changes.



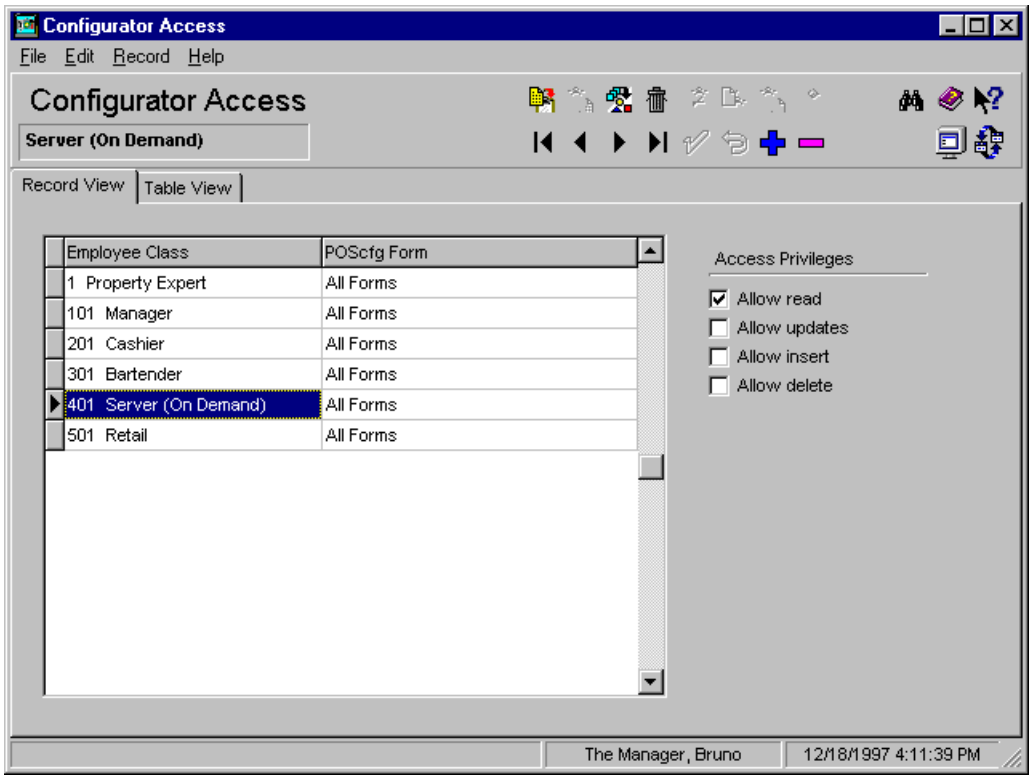
Example
In this restaurant cashiers are responsible for balancing a cash drawer. The employees in this class use an [Assign Cashier] key to create a cashier link. Another method of assigning a cashier link is by UWS. See "User Workstations" on page 4-11 for more information.

Configurator Access

The Configurator Access form allows you to privilege some employee classes to view programming information, or to make changes to all or some forms.

Programming

Choose the forms that each employee class may access in POS Configurator, and indicate the actions they may perform.



Example
This restaurant allows servers to read the Menu Items form. They may not update, add, or delete records however.

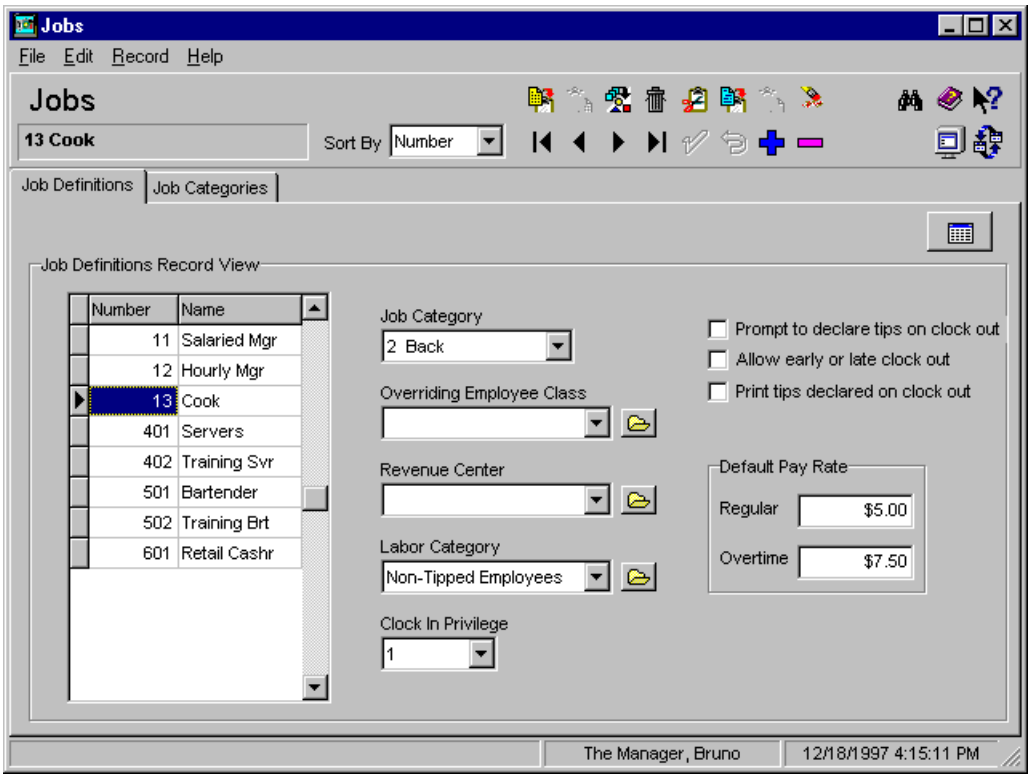
Jobs

In most cases the employee classes you create will translate into specific jobs. You might create jobs such as, Dishwasher, Chef, Kitchen Manager, Line Cook, Headwaiter, Server, Bartender, Manager, and Assistant Manager. You can define a default pay rate for each job and specify if employees clocking into that job are required to declare tips in the Jobs form.

Programming

Job Definitions

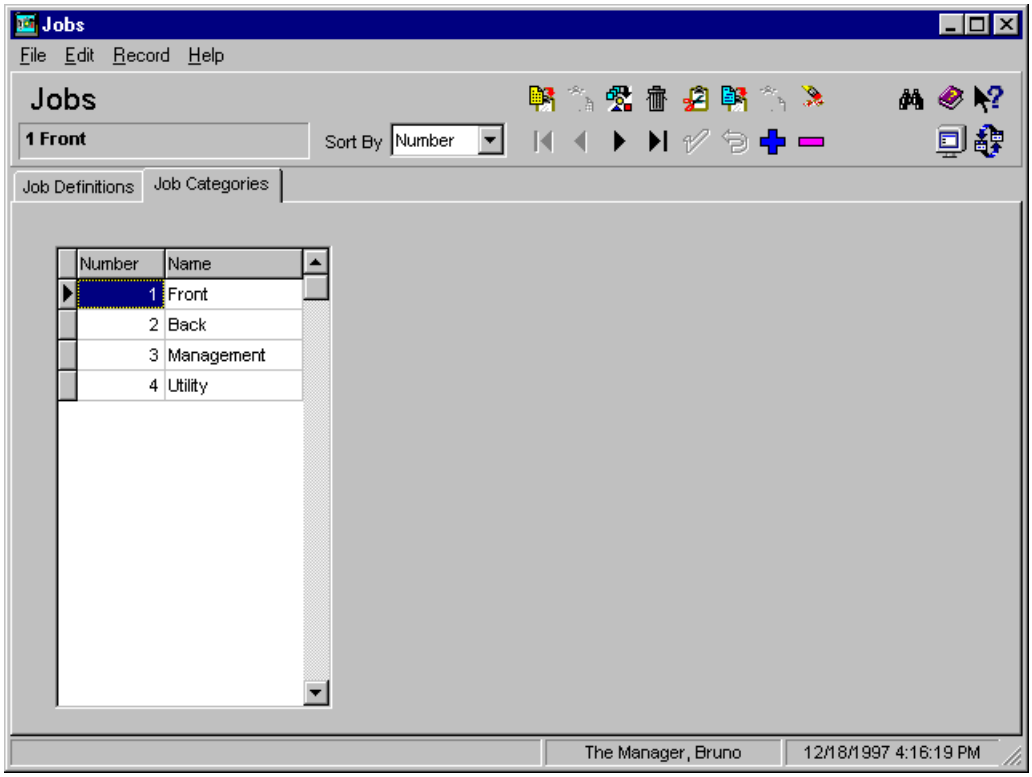
Create the jobs required by this restaurant.



Example
In this restaurant the default regular pay rate for a cook is $5.00 per hour. Employees clocking in under this job will be paid this rate unless a different wage is programmed in the Employees form (Job Rates tab).

Job Categories

Create categories for reporting purposes. Then assign each Job in the definitions tab to a category.



Example
This restaurant groups Dishwashers, Chefs, and Cooks into a job category called Back.

Employees

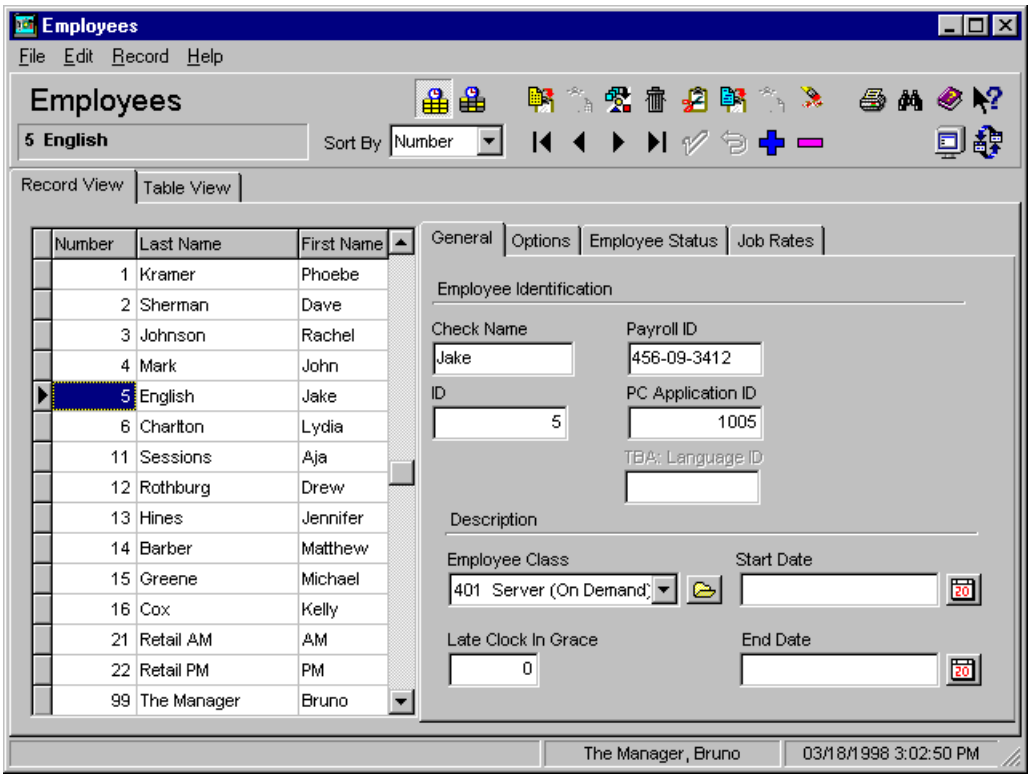
Organizing Employee Information

There are several ways to organize the employees form. You can list employees alphabetically from A to Z, or you can list employees alphabetically according to their employee class. This arrangement simplifies programming and maintenance.

Programming

General

Enter each employee's name. Then complete the fields on the General form.

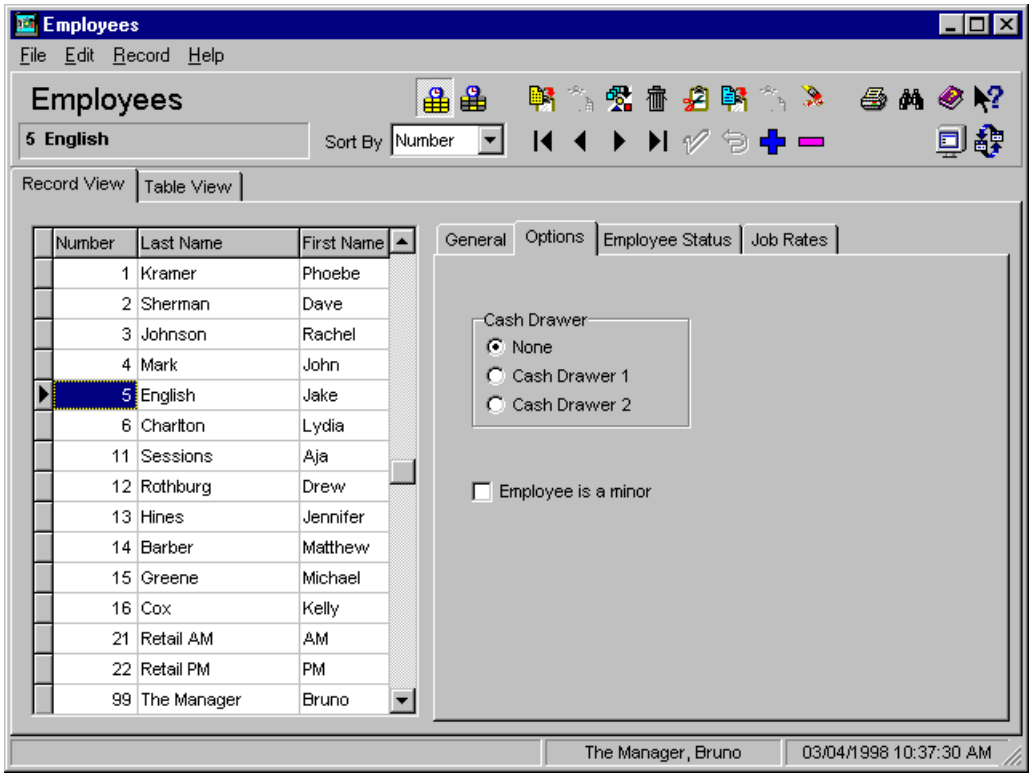


Example

Jake, a Server, is assigned the employee ID 5. He will use this number to sign in and clock in to the 3700 system.

Options

Assign a cash drawer to employees that require one.

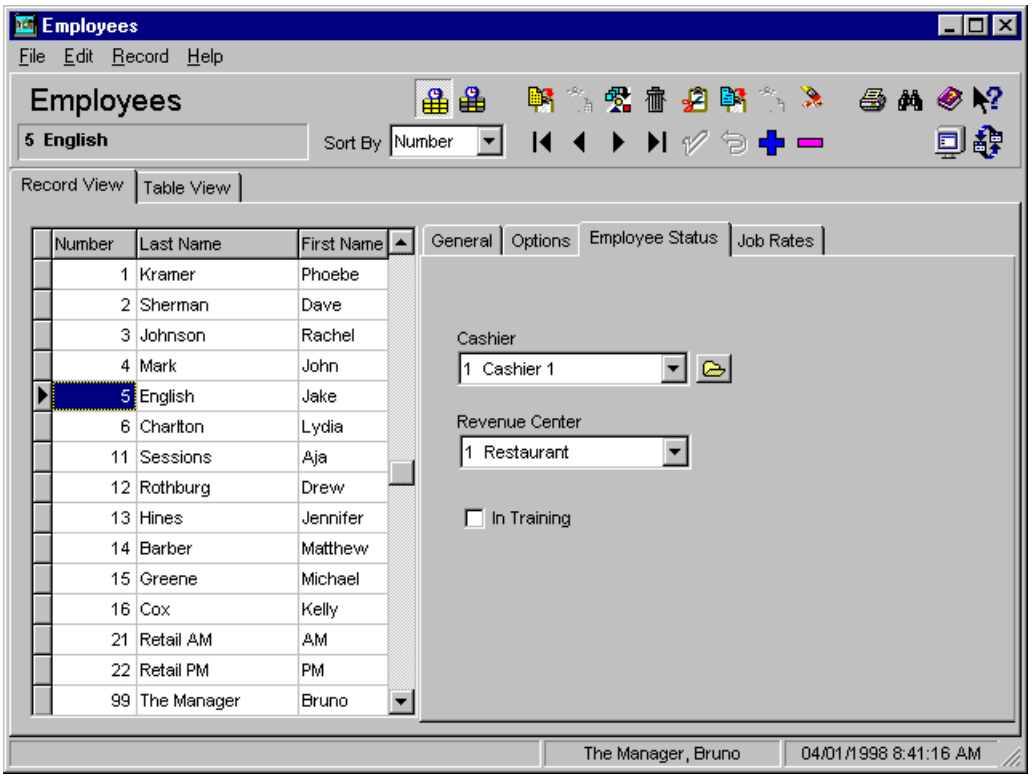


Example

In this restaurant, Bartenders are responsible for balancing a cash drawer at the end of their shift. Jennifer and Mathew are assigned cash drawers 1 and 2 respectively.

Employee Status

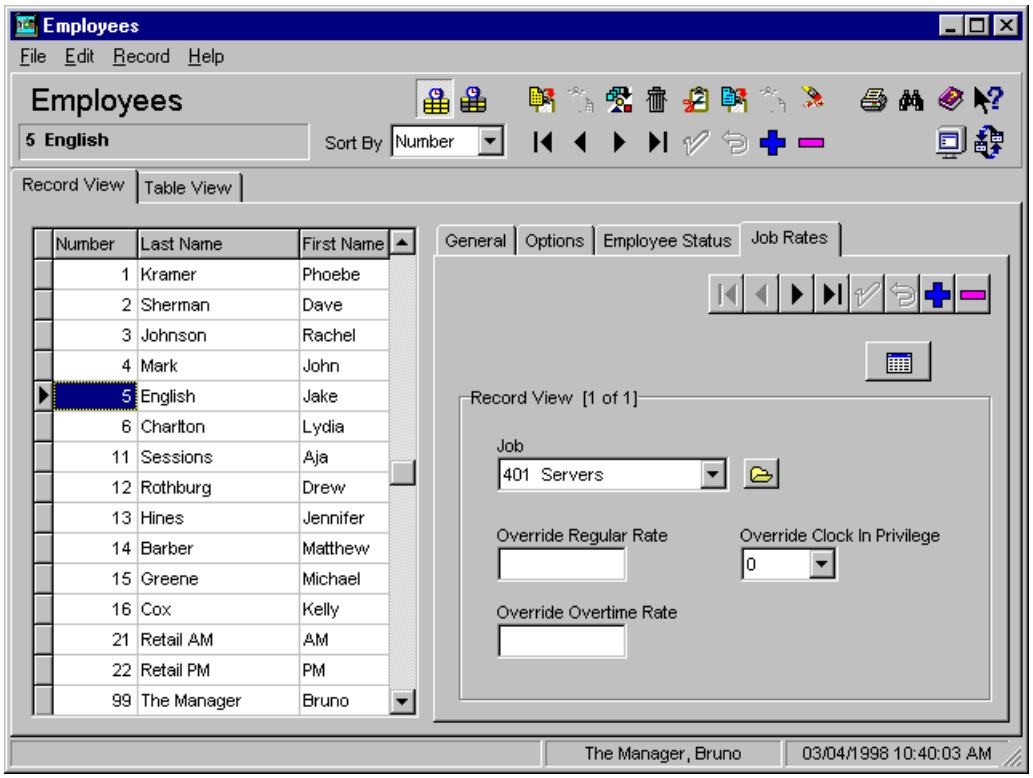
Select a cashier link for each employee's totals posting.



Example
Jake's totals will post to Cashier 1 in reports.

Job Rates

Select the Job that this employee most often performs and indicate any change in pay or clock in grace.



Example
Matthew, a long-time employee, is paid at a higher rate than the default pay rate established for cooks in the Jobs form. The higher rates are entered in the *Override Rate* fields.

Time and Attendance

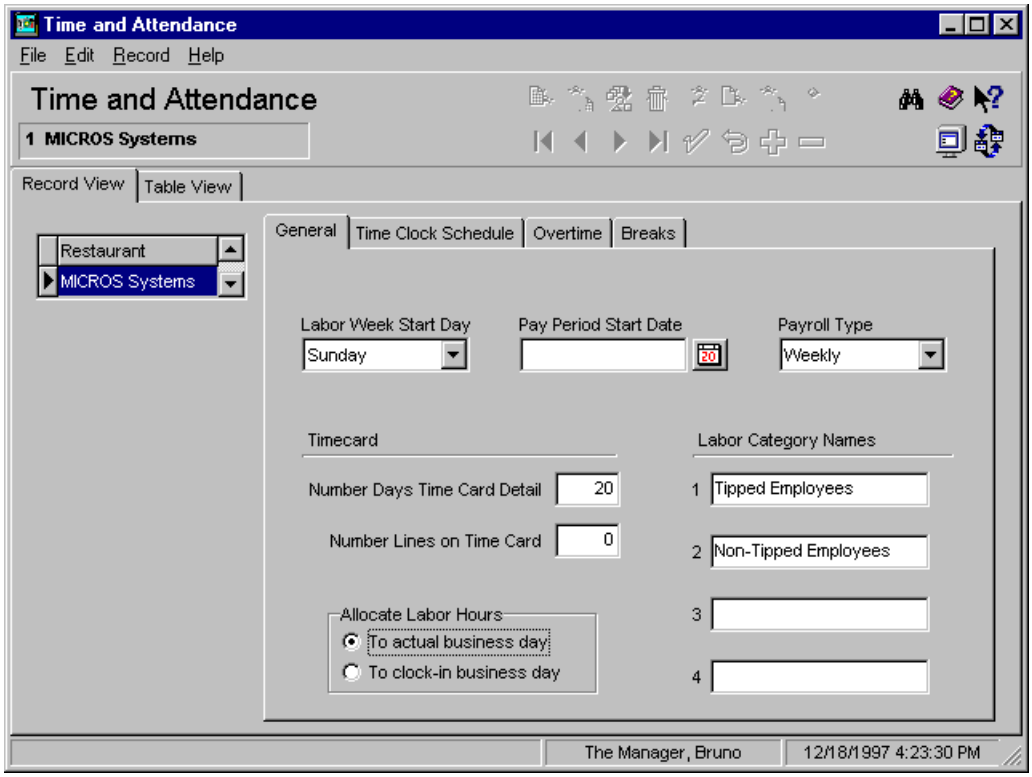
> ***Note***
>
> Programming of this form is not required unless your restaurant uses Time and Attendance.

Use the Time and Attendance form to program the 3700 system to keep track of wages, hours, and schedules.

Programming

General

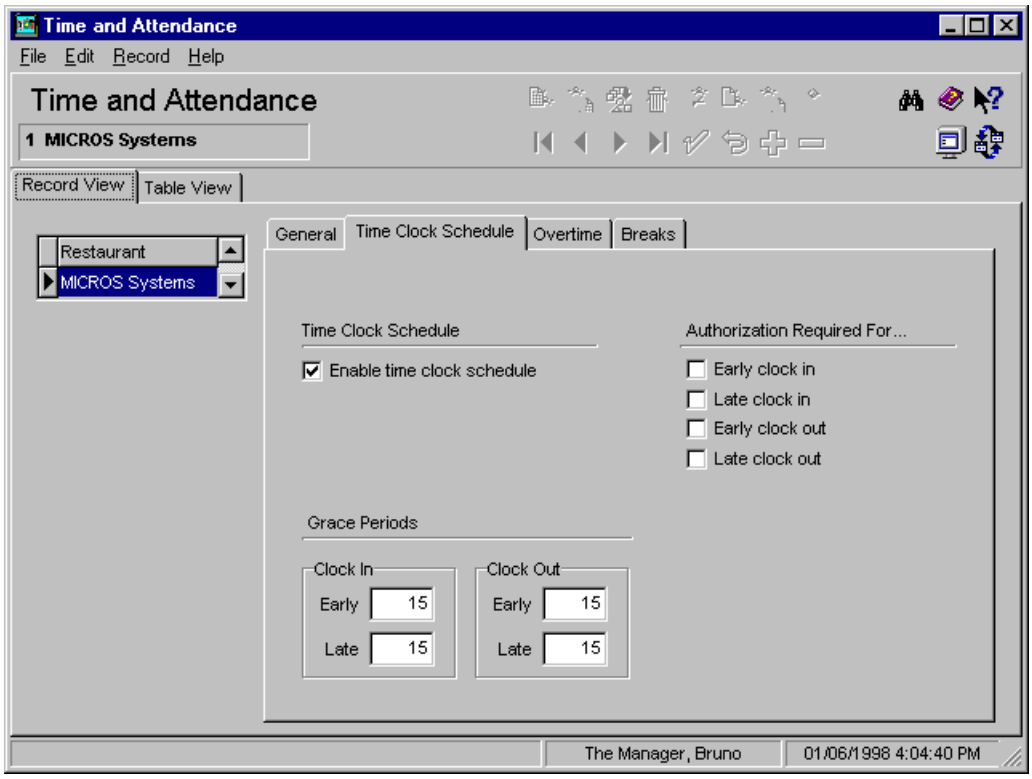
Define the payroll information for this restaurant.



Example
This restaurant's payroll begins on Sunday and is calculated weekly.

Time Clock Schedule

Enable the schedule created in the Time Clock Schedule form, and select the desired options and grace periods.



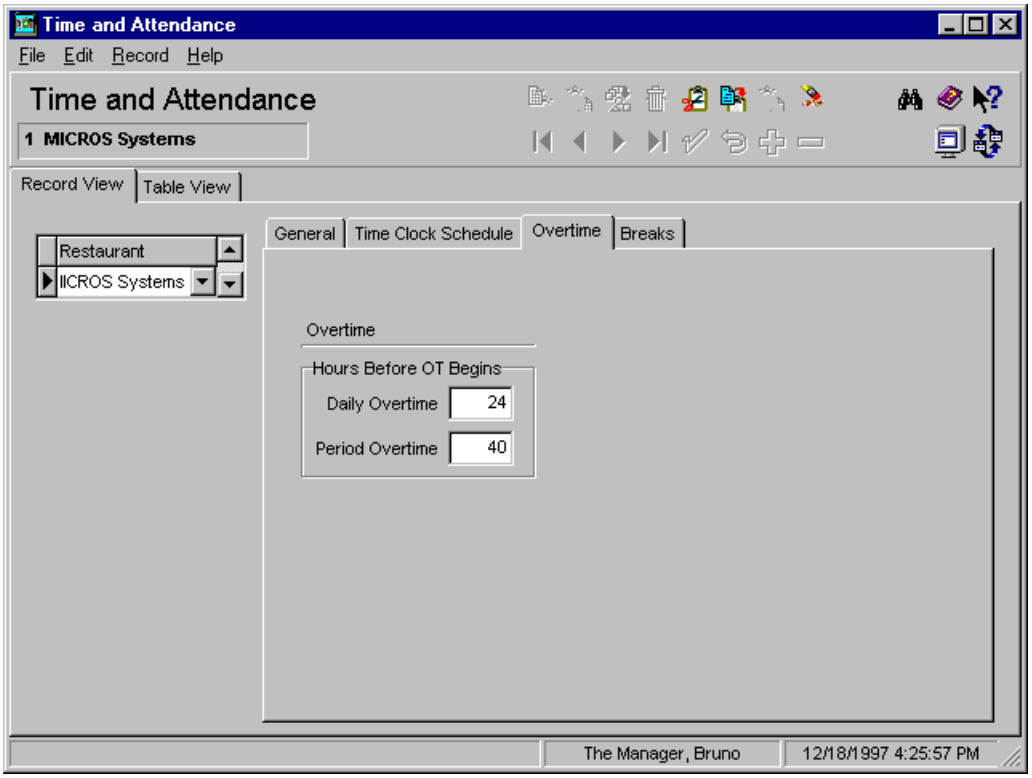
Example
This restaurant uses the Time Clock Schedule. Employees in this restaurant are allowed a 15 minute grace period when clocking in or out. This means they may clock in up to 15 minutes before or after their scheduled start time. If they attempt to clock in outside this grace period, the system will require authorization.

Note

Individual employees may be given a specific late clock in grace in the Employees form. The Employee Classes form provides options for overriding the Time and Attendance grace periods.

Overtime

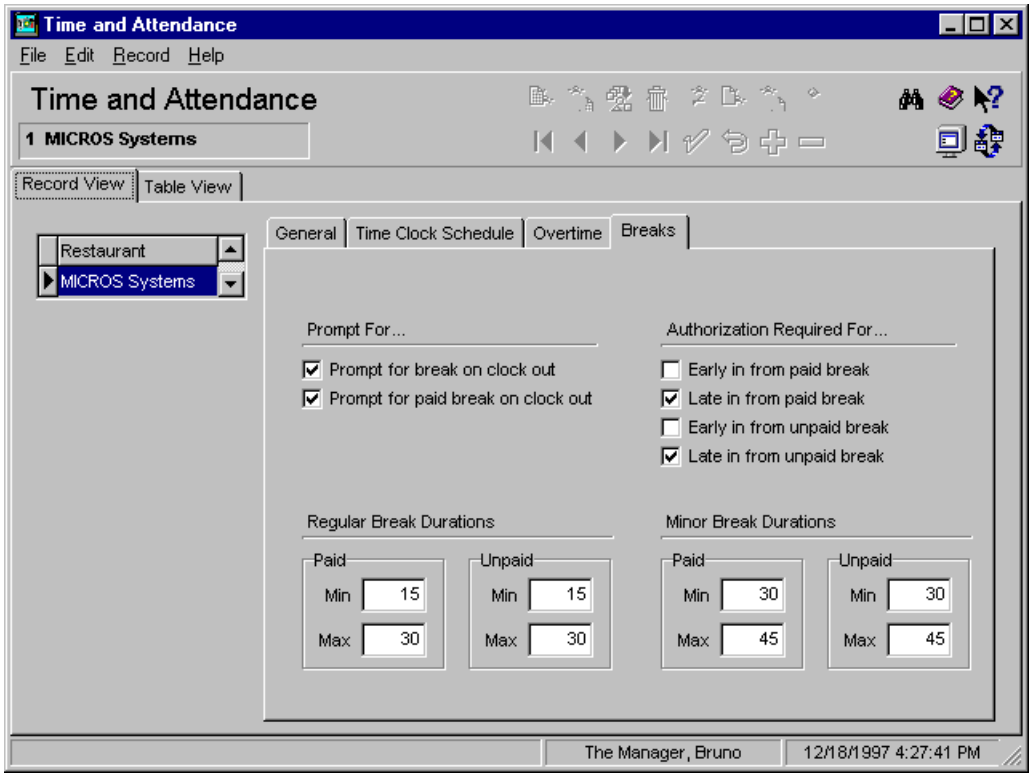
Define the overtime parameters for this restaurant.



Example
This restaurant's daily overtime begins after 24 hours on the time clock.

Breaks

Enter information about break durations, prompts and authorization for this restaurant.



Example
This restaurant allows employees one paid and one unpaid break each day. When employees clock out, they are prompted, “Are you taking a paid break?” In addition, the system is programmed to require authorization for employees clocking in late from paid or unpaid breaks. The restaurant does not track early clock ins.

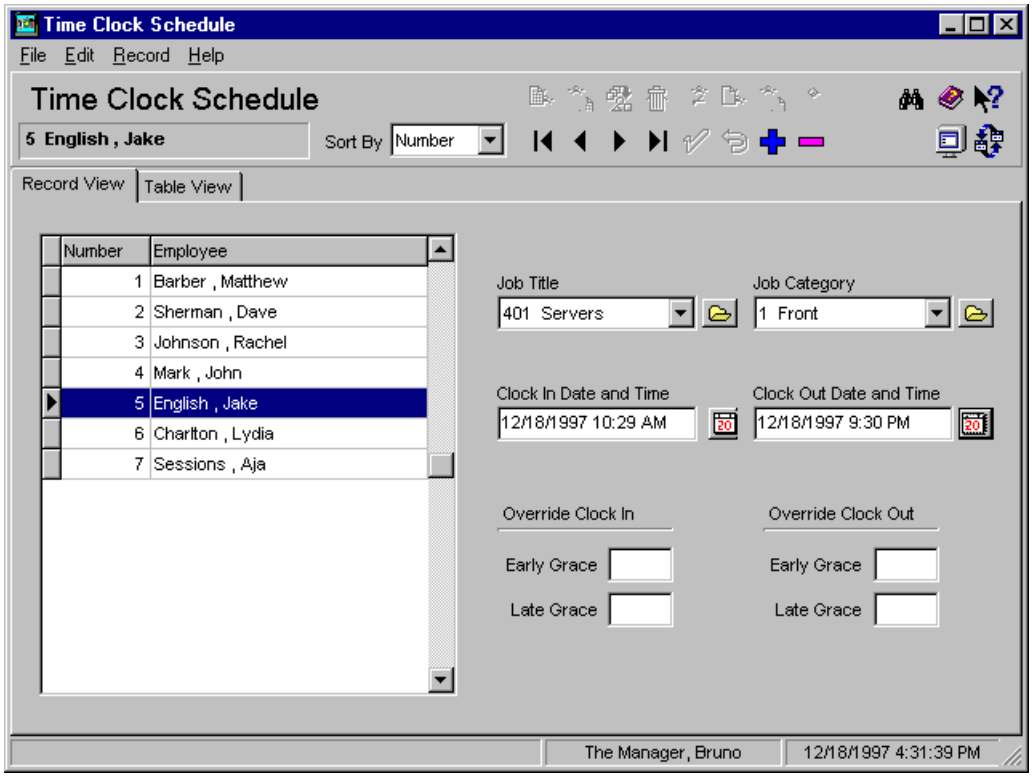
Time Clock Schedule

Programming of this form is not required unless the Time and Attendance feature is used in this restaurant.

While Time and Attendance tracks hours and wages, the Time Clock Schedule lists the days and hours each employee works. Each employee may be assigned a job. To reduce labor costs, employees may be prevented from clocking in early or clocking out late, and the schedule can be used to call attention to employees who clock in late or clock out early.

Programming

Create a schedule for each employee.



Example
Each employee is assigned a date and time for clocking in and out. Micros recommends using Table View for programming the Time Clock Schedule form. If no Job Title is assigned, the employee is prompted to select a job when clocking in.

Chapter 9

Reporting

Use the Reporting folder to program totals tracking, create autosequences, and automate routine tasks.

In this chapter

Overview 9-2
Report Templates 9-3
Report Classes 9-5
Report Date Range 9-6
Schedule Classes 9-7
Cashier Totals 9-9
Historical Totals 9-10
Report Groups 9-12
Tracking Groups 9-15
Autosequences 9-17
Autosequence Steps 9-18

Overview

Use the forms in the Reporting folder to customize reporting to meet a specific restaurant's needs. The 3700 system comes with many standard report templates which may be used to run reports manually, or included in autosequences. You can create additional Report Classes, Date Ranges, Schedules, Totals information, and Tracking and Reporting Groups in this folder.

Program the forms in the following order:

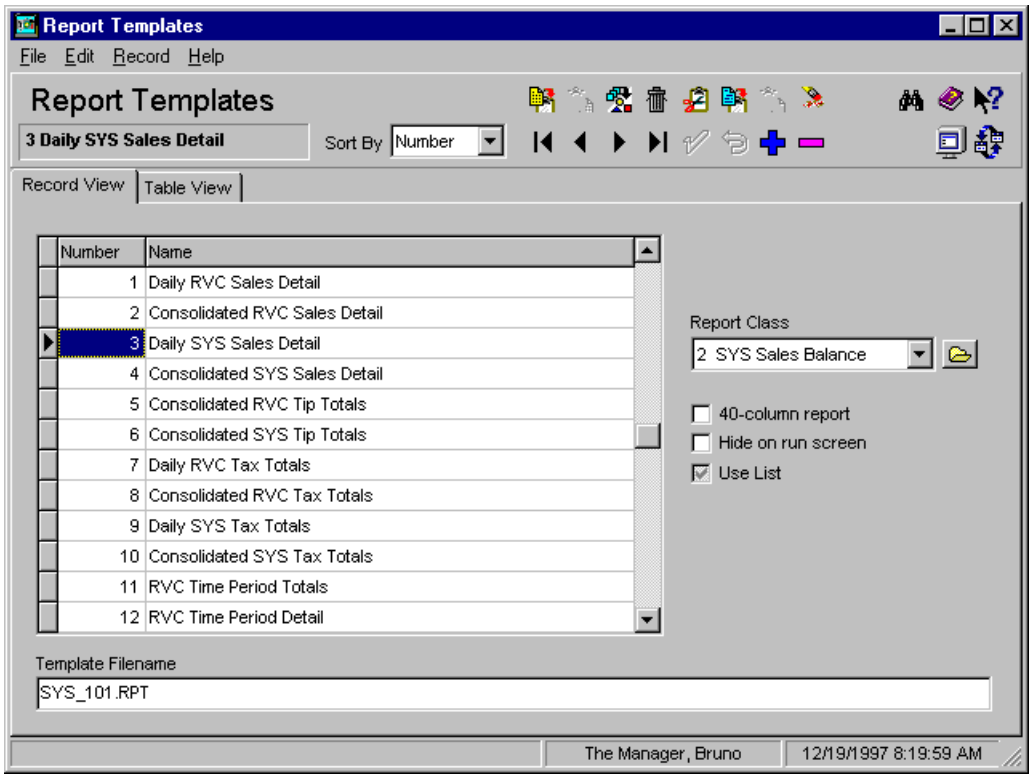
1. Report Groups
2. Tracking Groups
3. Historical Totals
4. Report Classes
5. Report Templates
6. Report Schedule
7. Report Date Range
8. Autosequences
9. Autosequence Steps

Report Templates

The system ships with a set of standard report templates designed by MICROS. The reports run from the Autosequences and Reports module are based on the templates in the Report Templates form. Templates also include formulas that calculate information for some fields.

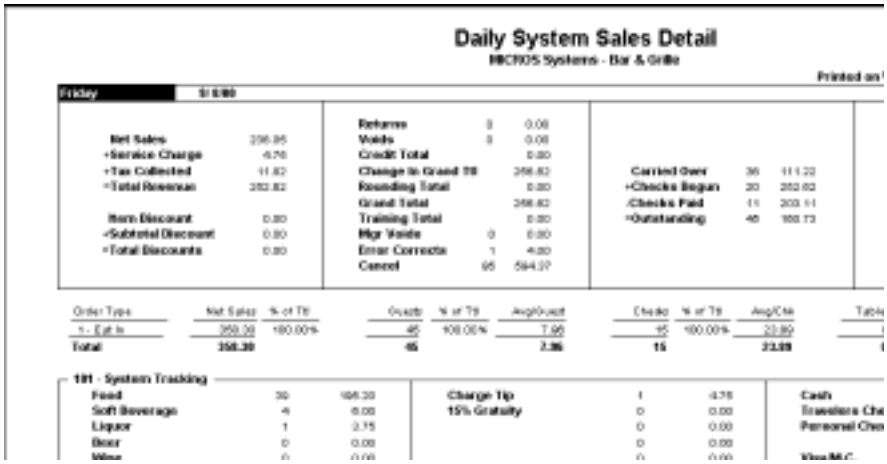
Programming

Use this form to add any specialized report templates this restaurant requires.



Example

This report was generated by the Daily System Sales Detail template.

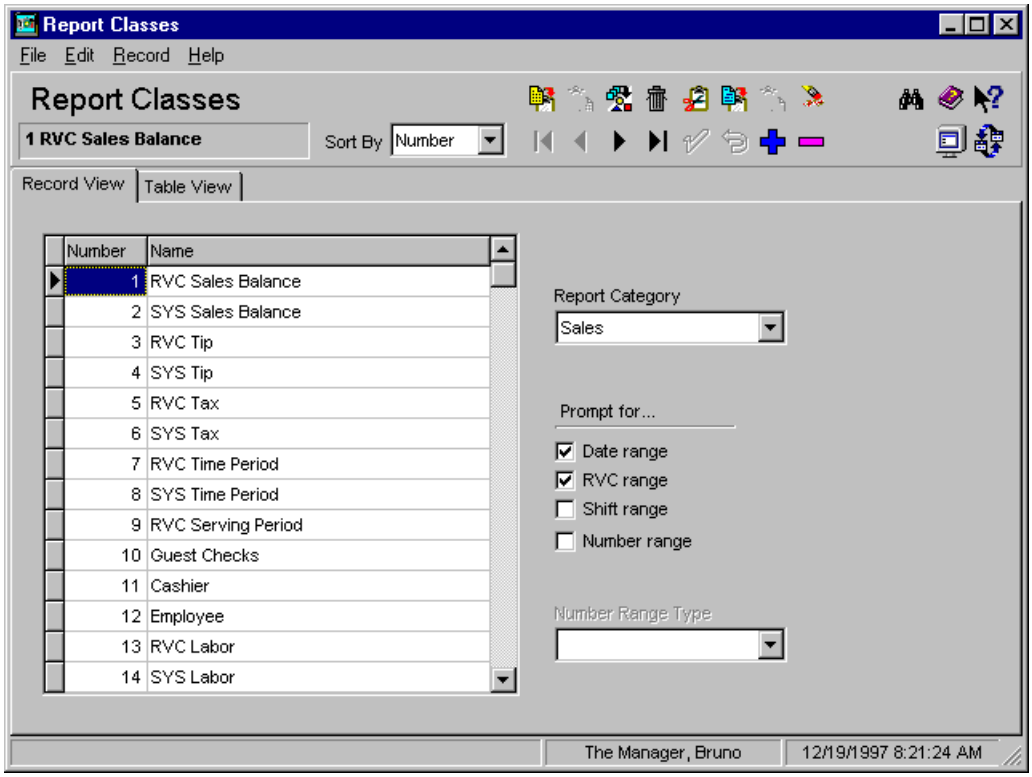


Report Classes

The sample database provides you with predefined report classes. Report classes are useful because there are over 200 report templates in the sample database. Report classes allow you to assign similar attributes to a group of reports.

Programming

Create any additional Report Classes required by this restaurant.



Example
The report templates System Job Summary, Employee Time Card and Job Detail, and Employee Job Summary belong to the Report Class "SYS Labor." SYS Labor reports are programmed to prompt for a date range. These reports run from the Labor category in the Reports module.

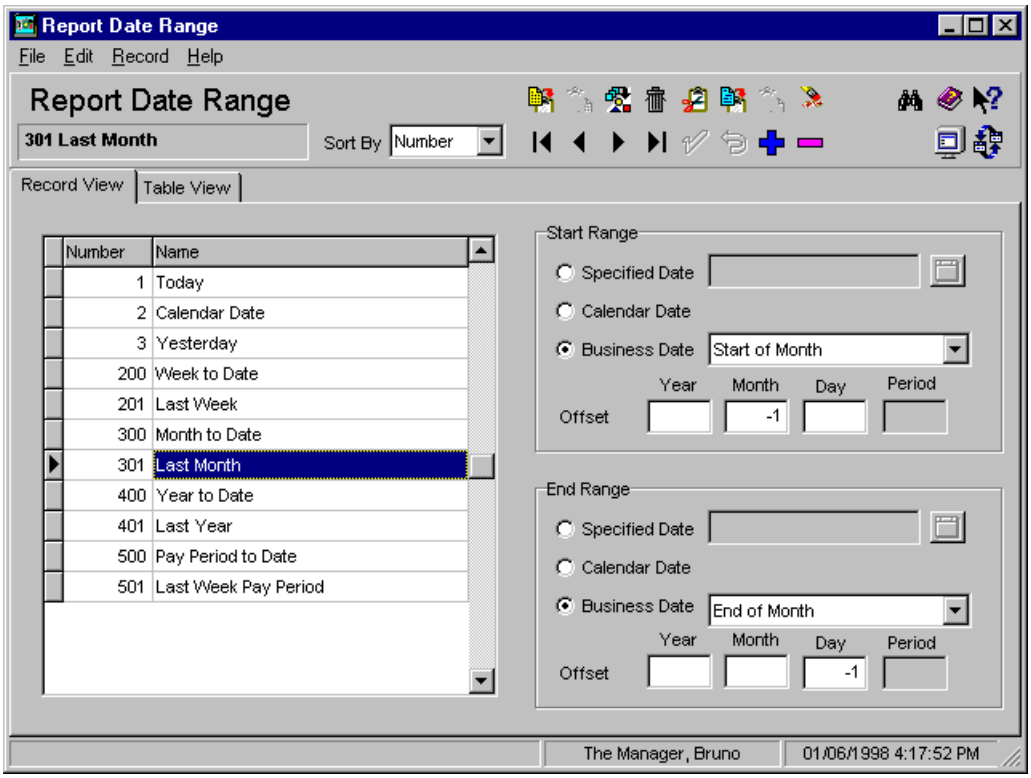
Report Date Range

Use the Report Date Range form to create date ranges for reports whose Report Class have the option *Prompt for Date Range* selected.

Offset
The Offset field can be used to modify a date type by selecting a specific start or end date. For example, you could create a report range for yesterday by selecting Business Date (for the current business date) and entering -1 in the Offset Day field.

Programming

Create the reporting ranges required by this restaurant.



Example
A date range for last month is created by the entries in the example above.

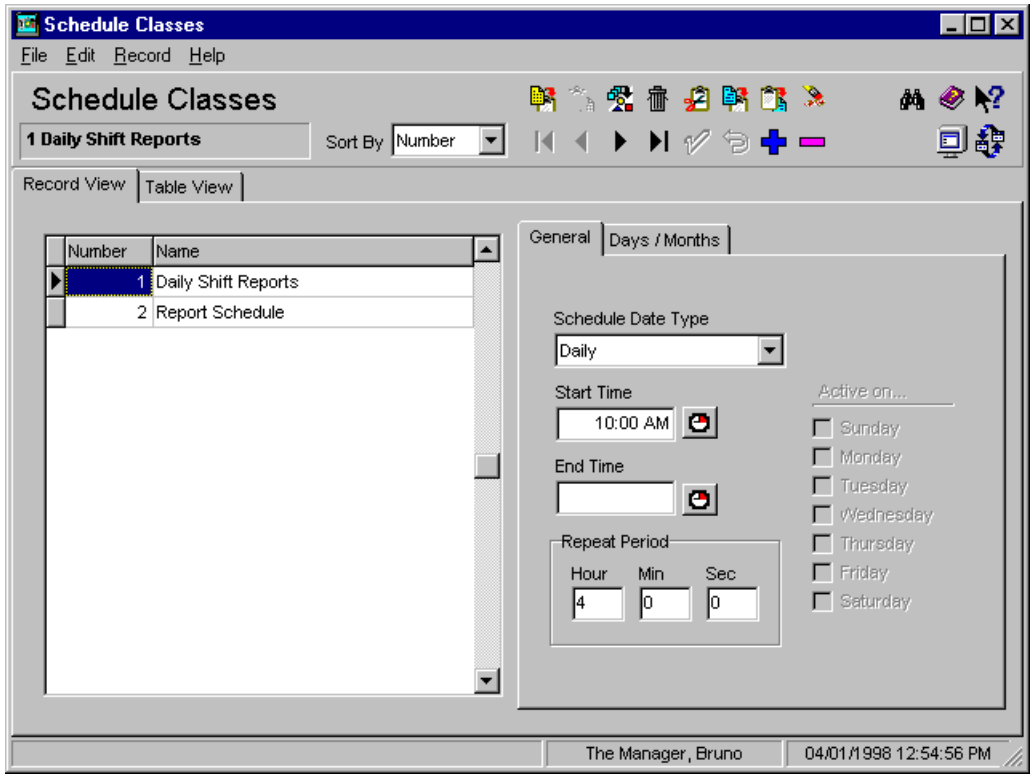
Schedule Classes

Use the Schedule Classes form to create schedules for reports generated by autosequences.

Programming

General

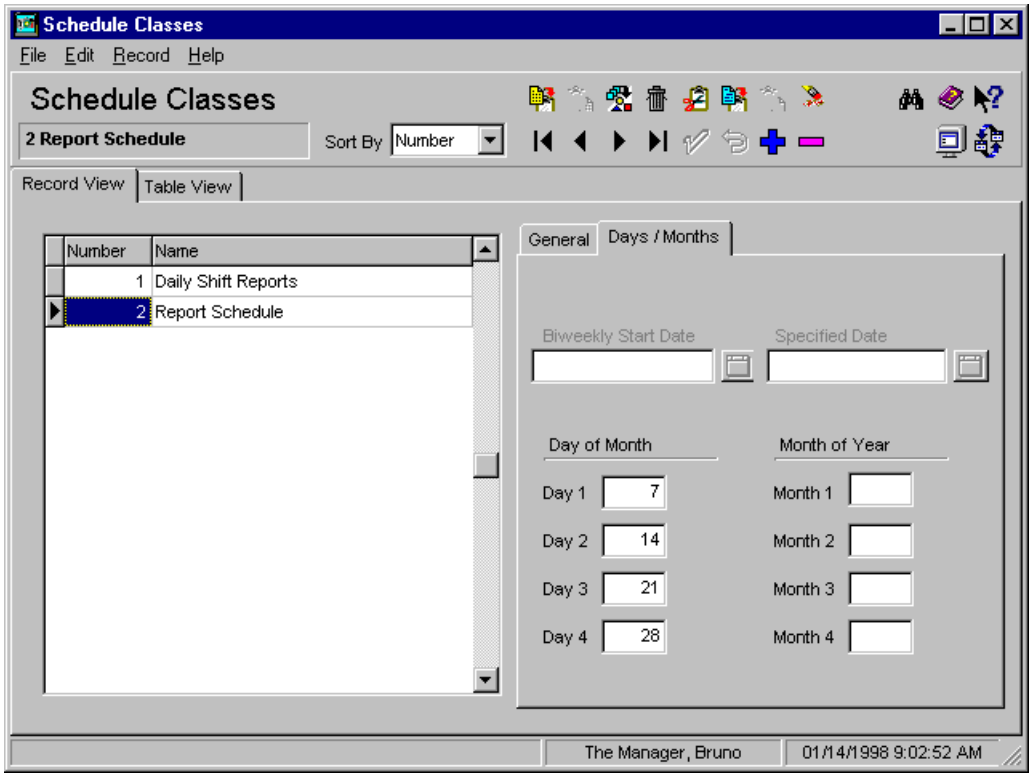
Create the report schedules this restaurant requires.



Example
In this example Daily Shift Reports runs every day beginning at 10:00a.m. and repeats every four hours.

Days/Months

Use the numbers 1 - 31 (for days) and 1 - 12 (for months) to specify the dates or months included for schedule types Dates in Month or Months in Year.



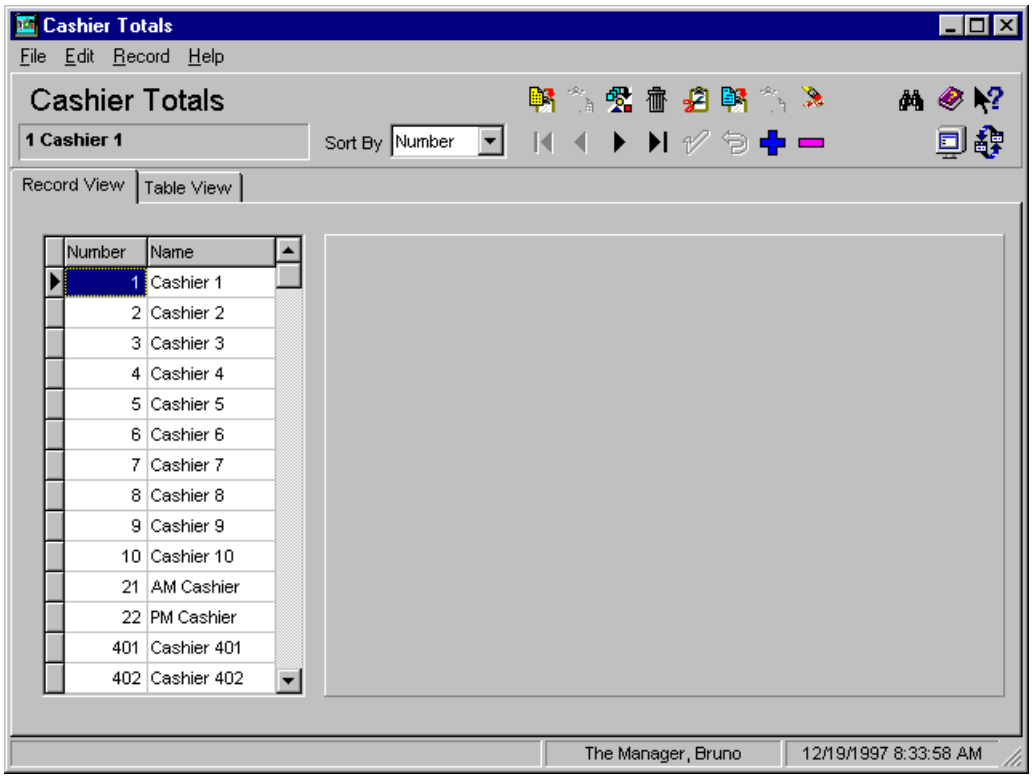
Example
This Report Schedule reports totals for the 7th, 14th, 21st, and 28th of each month.

Cashier Totals

Use this form to create a name for each cashier link in the system. The name might be assigned to an employee or a UWS depending on the method this restaurant uses to track cashier totals.

Programming

Create a cashier link for each UWS or Employee.



Example
In this restaurant each employee is assigned a cashier link.

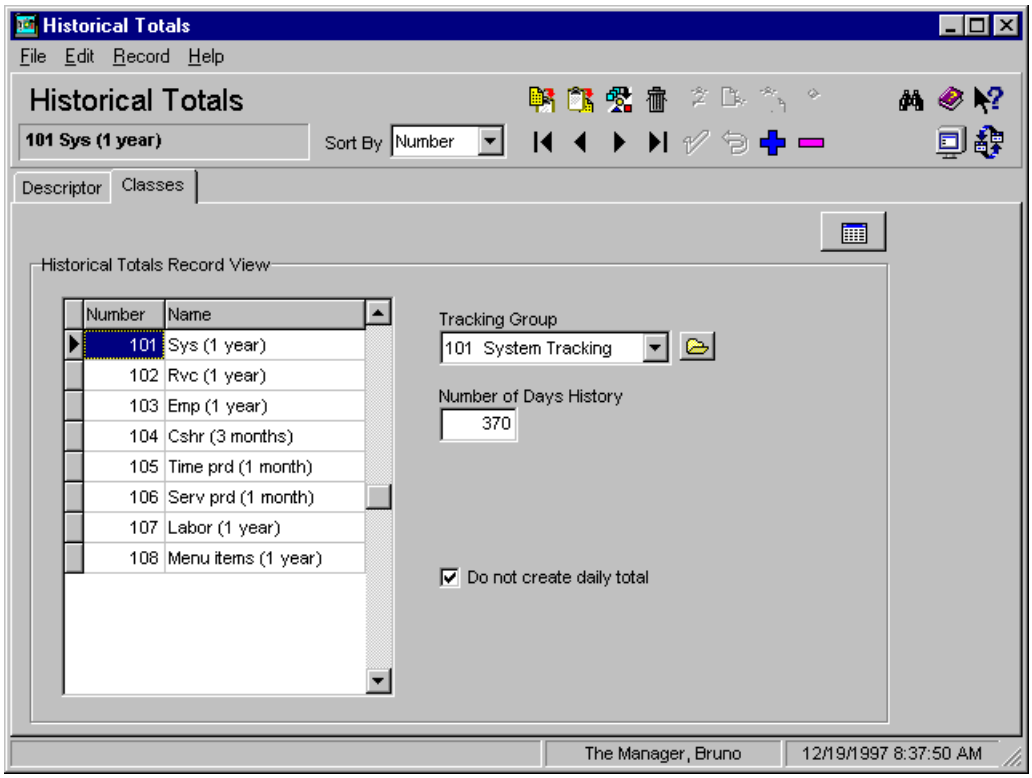
Historical Totals

Use the Historical totals form to determine a period of time for saving totals accumulated by the 3700 system. Before you can assign Historical Totals to each database totals table, you must create the classes. The sample database includes some predefined classes for your use.

Programming

Classes

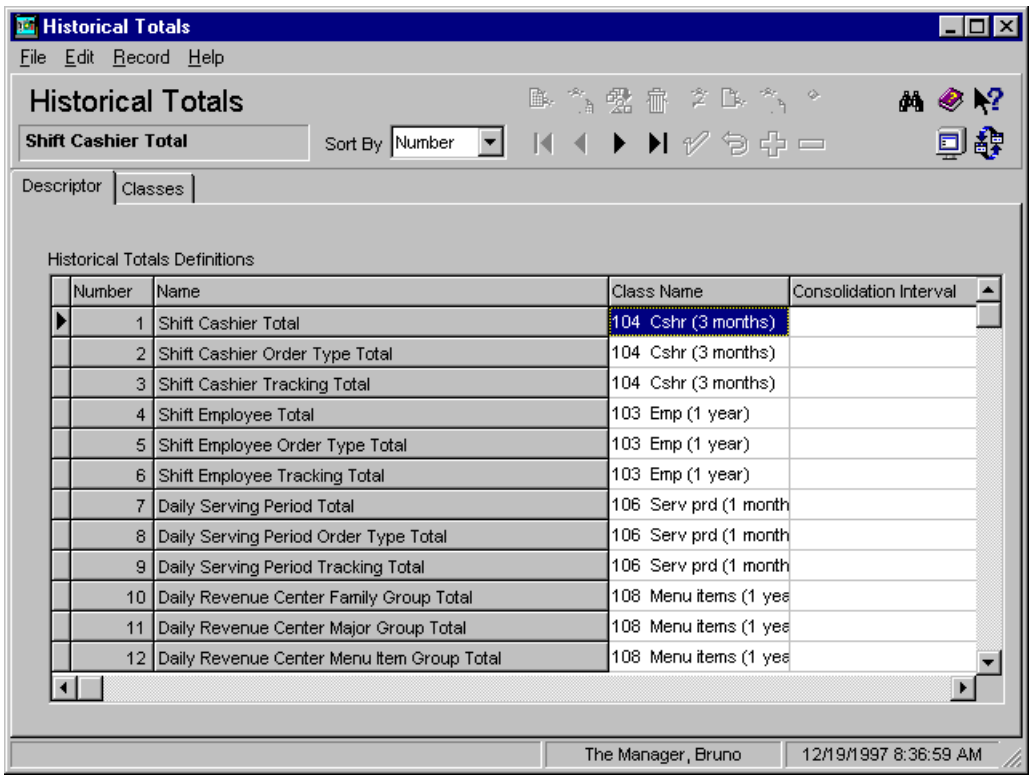
Create any additional Historical Totals classes required by this restaurant.



Example
Totals in the Weekly Totals class are saved for 7 days. Selecting the option *Do not create daily total* means that daily totals are not stored for totals in this class. This option helps to minimize the size of the database.

Descriptor

Assign an Historical Totals class to each Historical Total to determine how data is stored in this totals table.



Note

The *Name* field in the Descriptors tab is not editable. The field contains a descriptive title for each totals table in the database.

Example

In the table above, Shift Employee Total is assigned to the Weekly Totals class. Totals will be saved for seven days and no daily totals will be created.

Report Groups

Report Groups provide a means for creating subtotals and sorting items on reports, as well as selecting items to include in a report. Each menu item in the system can be programmed to post to one major group, family group, and menu item group. Sales reports provide sales information for each group.

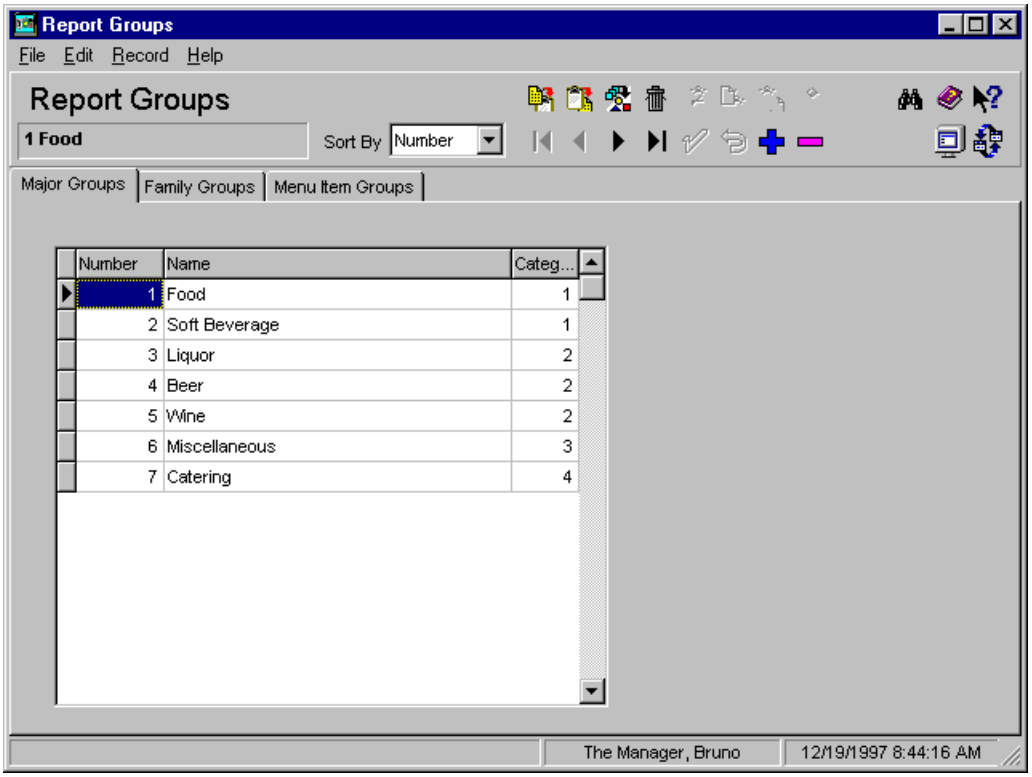
Note

There is no implicit relationship between these groups; no hierarchical structure. For example, family groups are not required to be a subset of major groups.

Programming

Major Groups

Create the Major Groups required by this restaurant.

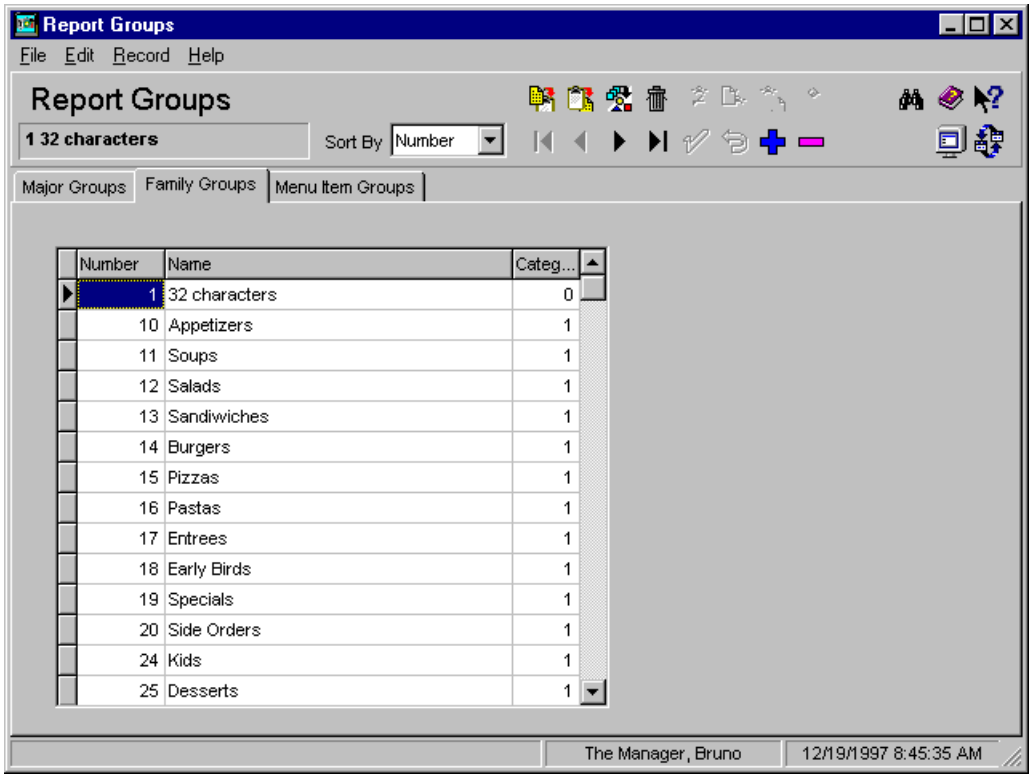


Example

This restaurant places Beer, Wine, and Liquor into separate Major groups. Another restaurant might place all these alcoholic beverages into one Major Group.

Family Groups

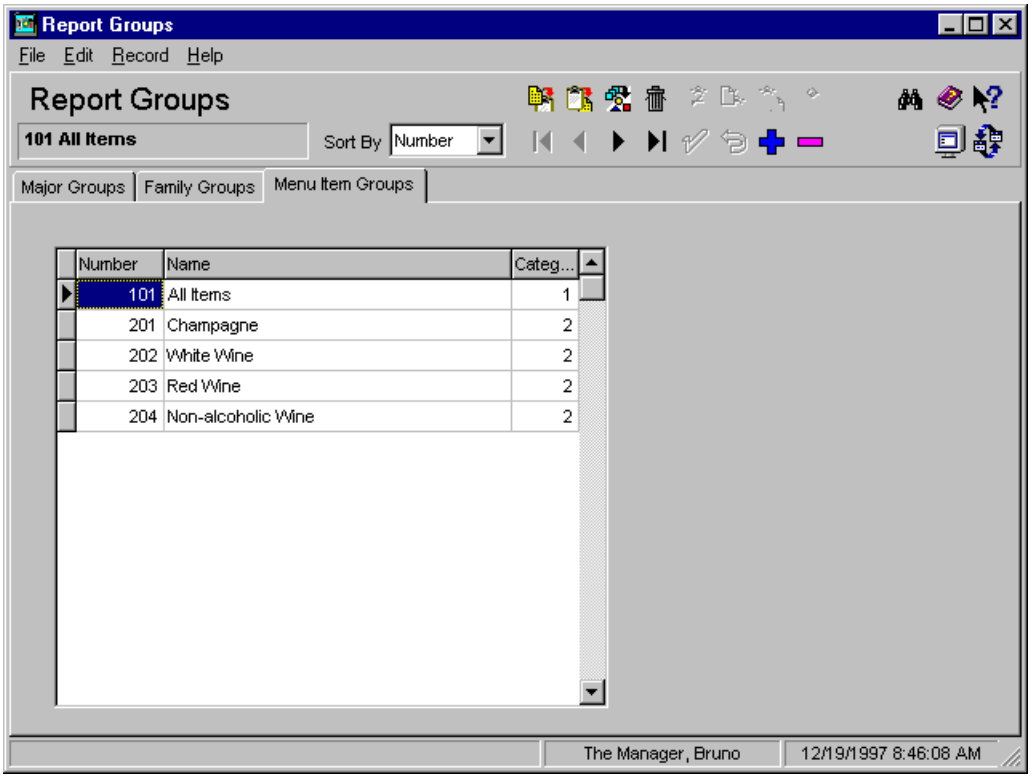
Create the Family Groups required by this restaurant.



Example
This restaurant creates a Family Group for each type of menu item. Soups, Salads, and Sandwiches are assigned the same category to ensure they will print together on reports.

Menu Item Groups

Create the Menu Item groups required by this restaurant.



Example

Menu item groups can be used to track sales of menu items that are not part of the same family group. For example, “Light and Healthy” selections are a part of the following Family Groups: Appetizers, Entrees, Salads, and Desserts. An additional Menu Item Group called “Light and Healthy” is created to track sales of these diverse menu items separately.

Tracking Groups

A *tracking group* is a set of totals used to track specific information.

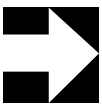
How Many Totals Can I Track in One Group?

When setting up tracking groups, keep in mind that you can create up to 64 tracking totals in a group, but only 48 will print on Micros standard reports. The system records information for the remaining tracking totals, but you must create a custom report to print it. See the *3700 Custom Reports Design Manual* for further information on creating custom reports.

Using Subtotals

Tracking totals appear on standard reports in three columns, with a subtotal for each column. You may be able to get useful subtotal information by grouping tracking totals appropriately. A subtotal is provided for each of the following groups of tracking totals:

- Tracking totals 1-16
- Tracking totals 17-32
- Tracking totals 33-48.

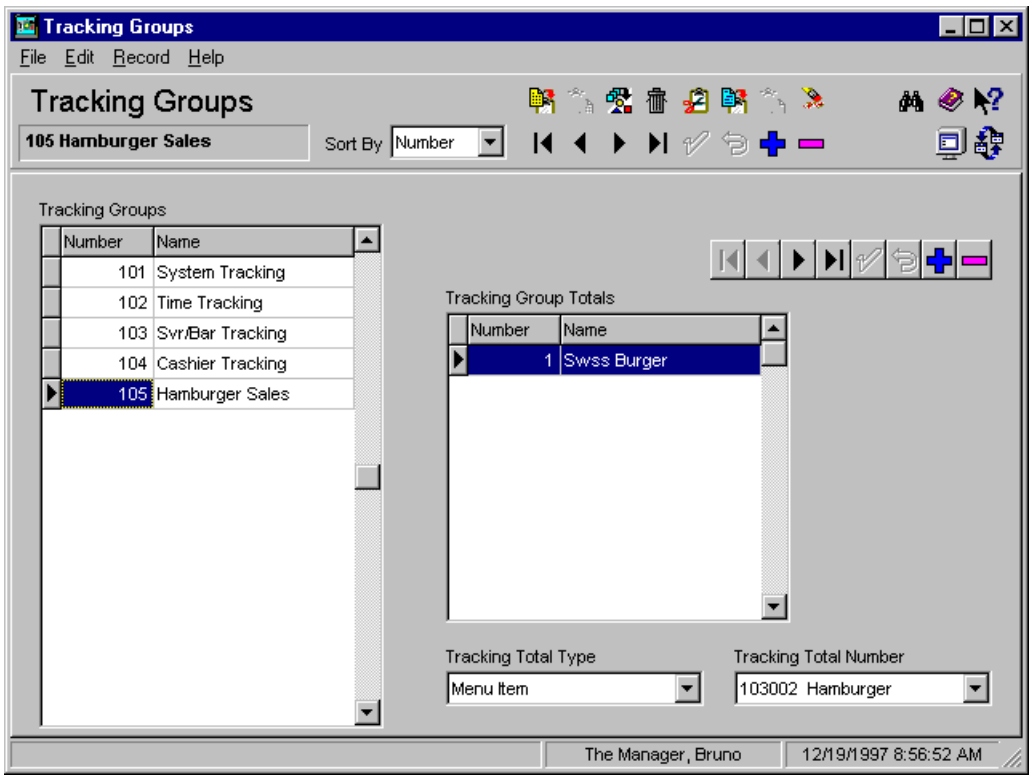


Note

Some tracking totals are predefined and do not require a Tracking Number. For example, Void is predefined. When you create a tracking group that uses the Tracking Total Type Void, it stores the total number of times the Void key is used.

Programming

Create each Tracking group required by this restaurant.



Note

Once totals are posted to a tracking group, it can no longer be modified. The Tracking Group form displays the message "Tracking Group in Use."

Example

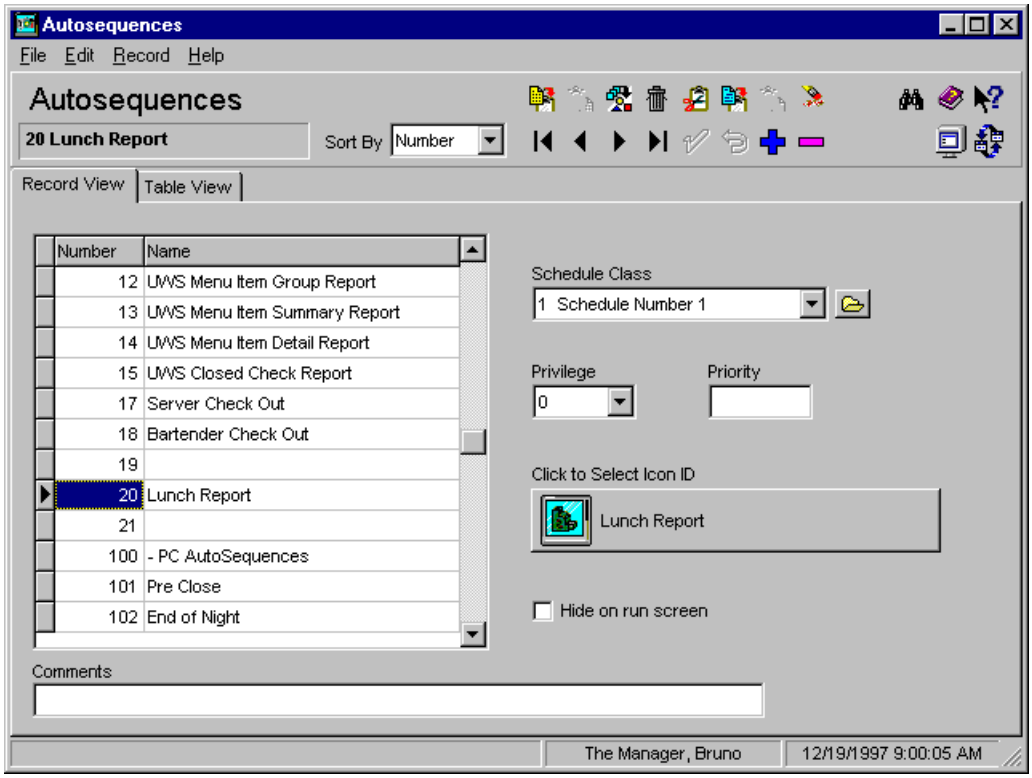
A restaurant that specializes in hamburgers may want to establish a tracking group to track the sale of these important menu items. First a name for the tracking group is entered in the Tracking Groups section on the left, in this case Hamburger Sales. Then a number and name is assigned to each item this group will track. In this example, Swiss Burger, Wally Burger, Steve's Burger, and Veggie Burger will be tracked. Since this tracking group will track specific menu items, the *Tracking Total Type* is Menu Items and the *Tracking Total Number* field displays each menu item.

Autosequences

An Autosequence is a predefined set of reports or other commands. The steps in an autosequence can be programmed to print reports, execute external programs, call stored procedures, or call another autosequence.

Programming

Create each autosequence this restaurant requires.



Example
This restaurant creates an autosequence called “Lunch Reports” to run a series of reports after the lunch hour. The reports that are part of this autosequence are defined in the Autosequence Steps form.

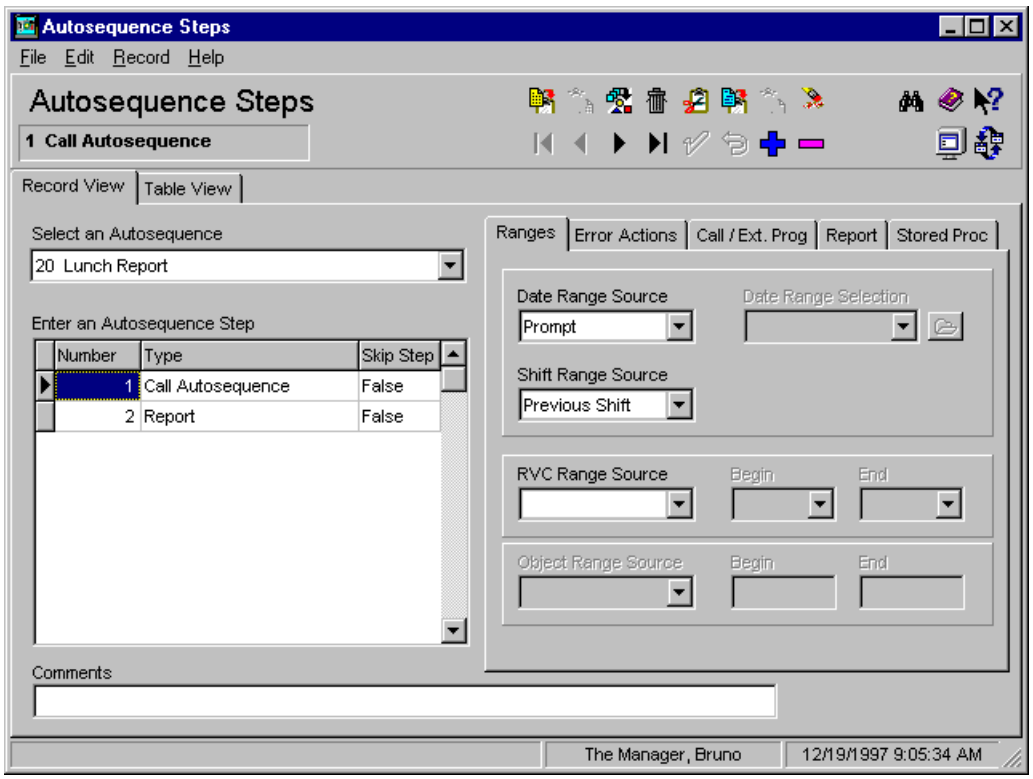
Autosequence Steps

Use this form to create each step in the autosequence. If the step is a report, select the report template to use and give it a unique title on the Reports tab. You can indicate what should happen if the autosequence encounters an error on the Error Actions tab, and determine the scope of the report using the options on the Ranges tab. If an autosequence step calls another autosequence or a stored procedure, select those options on the respective tabs.

Programming

Ranges

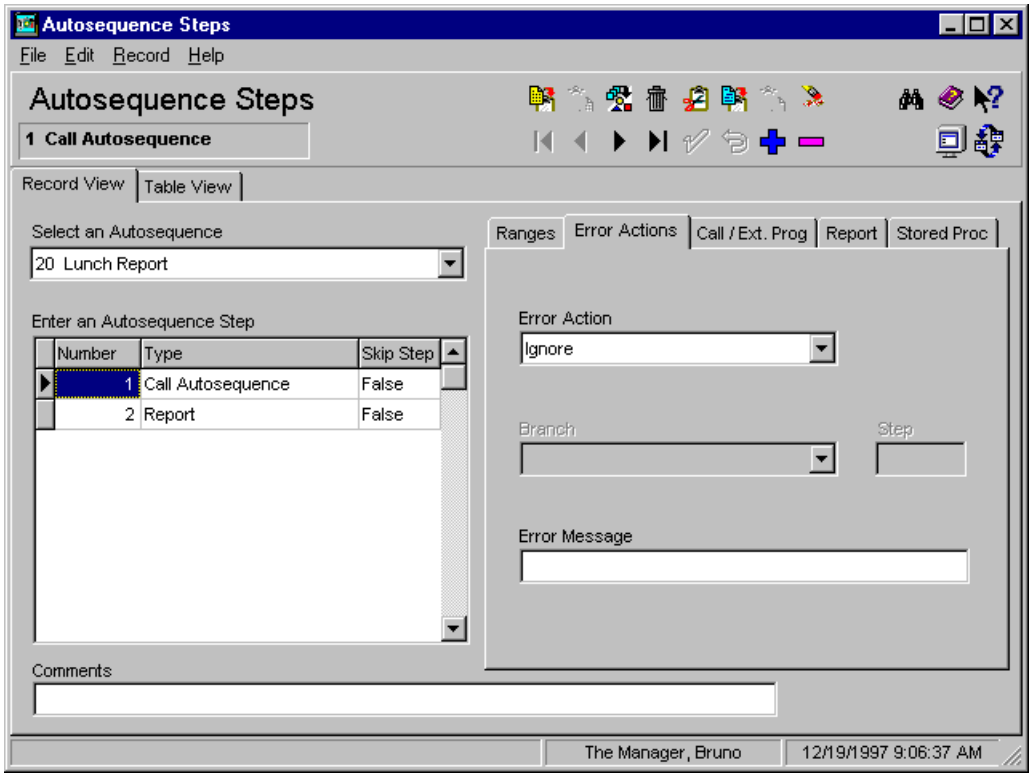
Select a method for determining the range of dates, shifts, revenue centers, and objects for each report in the autosequence.



Example
The first report in the Lunch Autosequence is programmed to prompt for a date range.

Error Actions

Choose what should happen if an error occurs during this step.

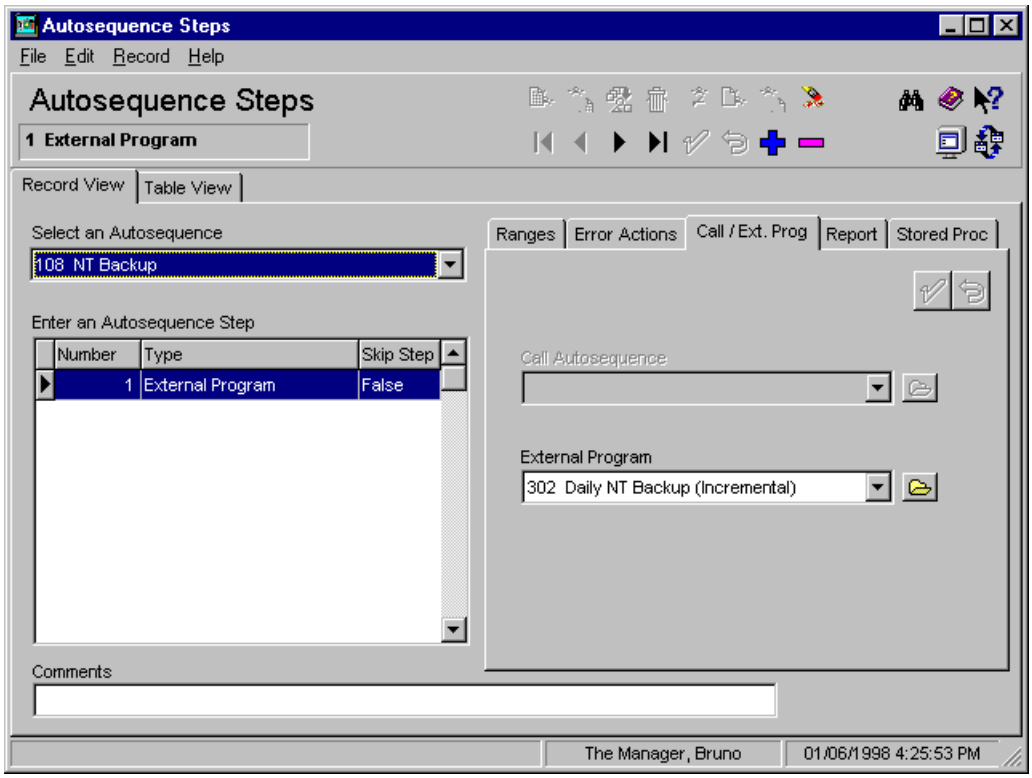


Example

The system will ignore any errors encountered during this step.

Call/Ext. Prog

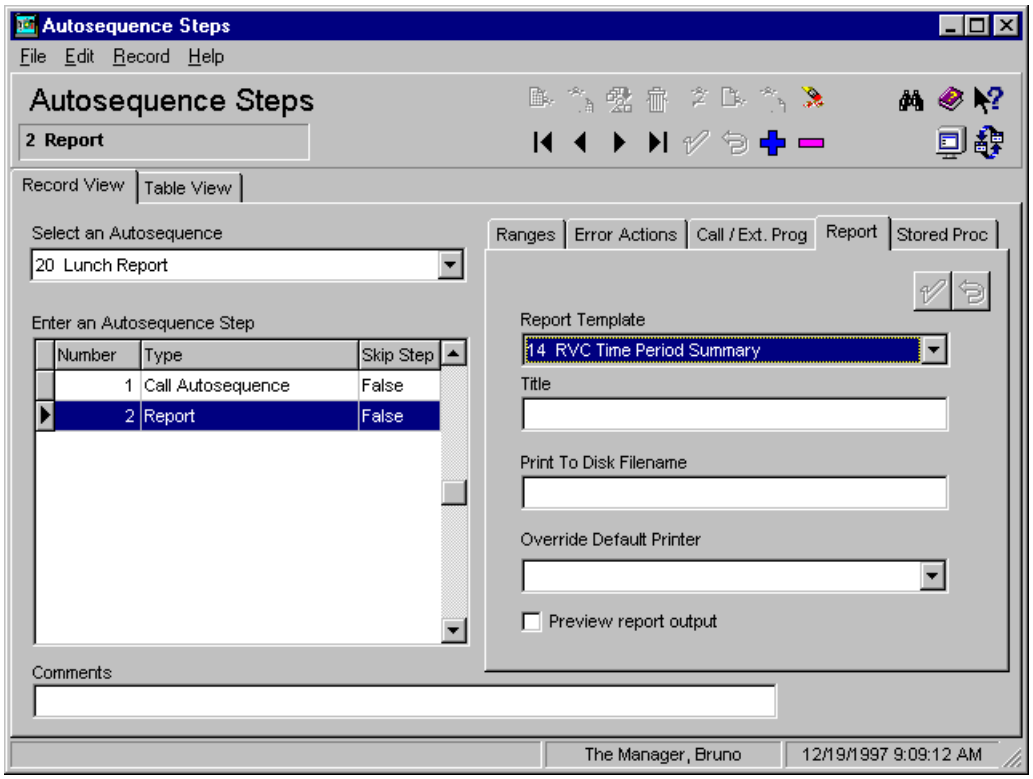
Choose another autosequence or and external program as a step.



Example
Starting NT Backup is a step that calls an External Program.

Report

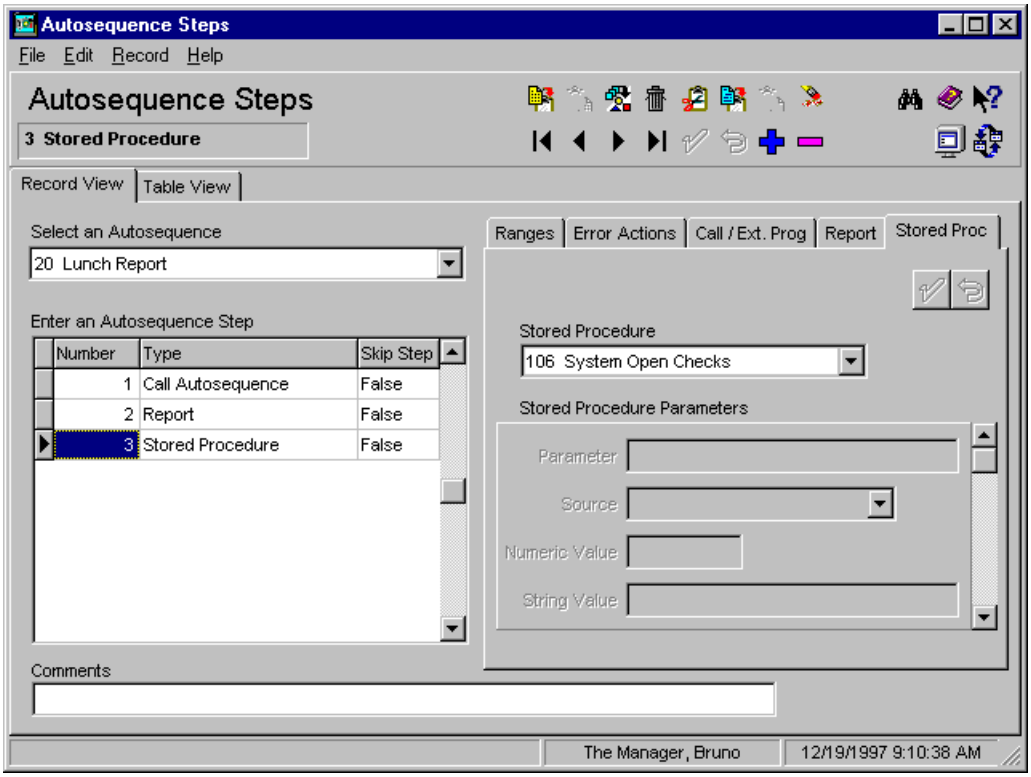
Select a report template as a step in an autosequence.



Example
The first step in the Lunch Reports autosequence is to run the Revenue Center Time Period Totals report.

Stored Procedures

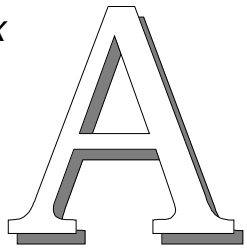
Add any stored procedures to this autosequence.



Example

The first step in an end of day autosequence could be to run the stored procedure which checks for open guest checks. Using the Branch option, when open guest checks are found during this step, the system can be programmed to print an open check report.

Appendix



For 2700 Users

This chapter describes the changes 2700 users will see in the 3700 POS Configurator.

In this appendix

What Happened to… A-2

What Happened to...

Some 2700 features have changed extensively or no longer exist. If a 2700 feature has been removed, it is usually because:

- ❏ a new 3700 feature has replaced the old feature.
- ❏ we implemented the feature in a different way.
- ❏ we are not including the feature in the current version of the 3700 system software.

The table below shows lists some 2700 features that are not included or are very different in 3700.

Feature	Obsolete	Different	Not in Version
Broadcasting Database	X		
Data Redundancy Configuration		X	
File Configuration	X		
Hexadecimal Type Fields	X		
Keyboard Table		X	
Liquor Dispensing System			X
MAP Characters		X	
PC ISN Configuration	X		
Report Options		X	
Tracking Groups		X	
Video Display Unit			X

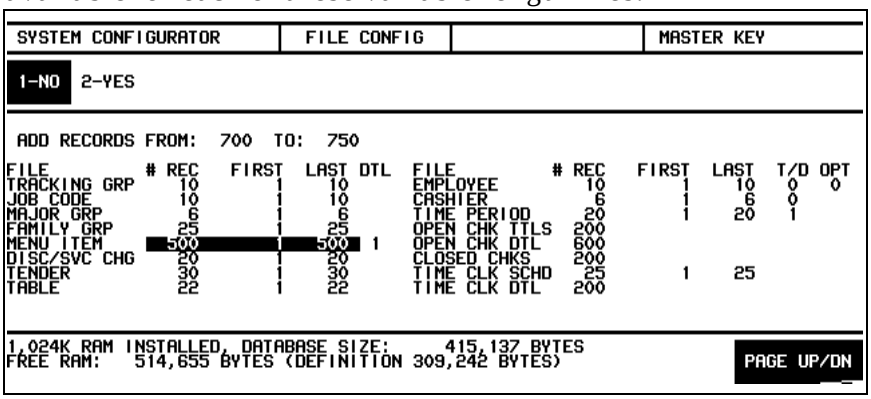
Broadcasting the Database

The configuration of the 3700 system network makes broadcasting the database unnecessary.

Since the 3700 database resides on the hard disk of the database server, the clients access the database from the server as needed. A change made to the database is immediately available to all clients; no database broadcast is necessary.

File Configuration

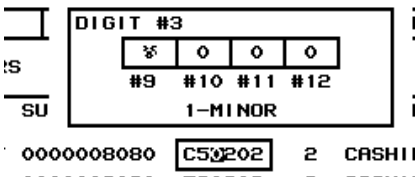
In the 2700 system, you must allocate a set amount of RAM to variable-length files to program the database.The amount of RAM installed in a 2700 system unit determines the size available for each of these variable-length files.



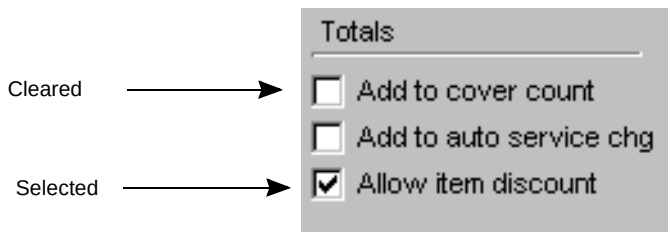
Allocating RAM to definition tables in the 3700 database is unnecessary. The size of your 3700 database is only limited by system resources.

Hexadecimal Type Fields

Most fields in the 2700 database required hexadecimal values.



The 3700 database does not use hexadecimal-type fields. Instead, you click a selection box to select or clear options.



MAP Characters

In the 2700 System, you can substitute up to six default characters with international or special characters, called MAP characters.

2700 Special Characters		
!	-	£
“	Ä	ß
$	Å	Ø
<	Æ	É
>	Ö	Ñ
\	Ü	

Now, you access special characters by using the Windows® 95 and Windows NT™ ANSI character set.

PC ISN

In a 2700 network, the MICROS PC ISN board allows you to link multiple 2700 Systems in a global communications network (ISN), creating logical systems. PC ISN is not used to network devices in a 3700 system. Instead, the 3700 system uses an industry standard Ethernet 10BaseT for networking user workstations, printers, and other devices in the system.

Report Options

The special report features once implemented by defining Report Options are now:

- ❏ Built into the report templates
- ❏ Options you can select in the Reporting folder

Index

Note: A Master Index is located in the *3700 Feature Quick Reference Manual.*

All page numbers are hotspots.

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