

# **DIAMONDTOUCH, INC.**

## *POS SOLUTIONS*

**DIAMONDTOUCH 5.5 SOFTWARE**

**USER MANUAL**

*Revised May 2007  
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## PART 1 USER FEATURES

### 1.10 Screen Saver

The DiamondTouch Screen Saver was designed to perform two (2) primary functions:

1. Increase the life of your monitor
2. Force all users to Log On prior to using the System

The Screen Saver can be set to run automatically, or can be enabled manually by touching the Diamond control button at the bottom center of the Main Screen. See section 3.10 A for more information on setting up your Screen Saver to run automatically.

Users should be trained to Log Off by enabling the screen saver as soon as they are finished interacting with the system. Otherwise, they will be held responsible for the actions of the next user on the system, should that user choose not to Log On.

#### A. Screen Saver User Log On

To enter the Diamond Touch System from the screen saver, users must Log On to the System. This can be accomplished in any one of three different ways :

- 1) Swipe a magnetic stripe card on the optional “wedge” reader attached to the Monitor
- 2) Touch anywhere on the black background to activate an on screen keypad. Using the on screen keypad, enter the user password and press Enter
- 3) Type the user password on the keyboard and press the Enter key

DiamondTouch systems are shipped with a default password of “0001”. For security reasons, this password should be changed before the system is used in your operation.

#### B. Clocking In

Users that have previously Clocked OUT of the system will be prompted to Clock IN immediately after Logging On. To Clock IN, simply select an Employee Job Code. Job Codes 1, 3 and 5 are reserved for servers. Servers will then be prompted to select a default Table Section. If you are unsure of your Table Section, use Section A.

### 1.15 Main Menu

The Main Menu provides quick access to the features most often used within the system. These features are as follows :

<u>Screen Control</u>	<u>Described</u>
Diamond Touch Logo	Section 1.15
Phone Order	Section 1.80
Driver Management	Section 1.90
Server Management	Section 1.70
Table Management	Section 1.50
Cash register Manager	Section 1.40
Tickets	Section 1.60
Clock Out	Section 1.15-B
Void Ticket	Section 1.37
New Ticket	Section 1.20
Recall Ticket	Section 1.25
Cash Out	Section 1.35

## 1.15 Main Menu (cont)

The Main Menu also provides a lower control bar that provides fast access to the following features :

### Screen Control

Exit System  
Reports  
Setup

#### A. User Log On from the Main Menu

Changing the current user from the Main Menu can be accomplished in any one of three different ways:

- 1) Swipe a magnetic stripe card on the optional “wedge” reader attached to the Monitor
- 2) Touch the Diamond Touch Logo to activate an on screen keypad. Using the on screen keypad, enter the user password and press Enter
- 3) Type the user password on the keyboard and press the Enter key

The identity of the Current User is always displayed at the top of the Main Menu.

DiamondTouch systems are shipped with a default password of “0001”. For security reasons, this password should be changed before the system is used in your operation.

#### B. Clocking Out

At the end of the shift, all users should be encouraged to Clock Out of the system. The Time & Attendance portion of the system, along with many of the other reports used by the system such as the hourly productivity report, rely on the employee time records as a guide for analyzing and reporting various activities within your operation.

To Clock Out of the system, simply touch the Clock Out control button on the touch screen, and press “Clock Out”. Users that have Clocked IN with Job Codes 1,3 or 5 will also be prompted to key in the amount of their tips. DiamondTouch will return to the Screen Saver once the user has clocked out.

## 1.17 Exit System

To Exit the DiamondTouch System, touch the Exit System control located at the bottom left of the Main Menu. DiamondTouch will ask you if you are sure that you want to exit; answer yes and you will be returned to your desktop.

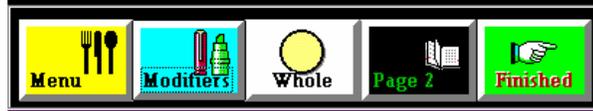
Note that a dedicated security level protects the Exit System control. Users without the proper security level will not be able to use this control. Please see section 3.40 B for more information on setting up your security levels.



## 1.20 Order Entry (cont)

### A. Primary Control Bar

The primary control bar provides instant access to the 5 most used functions in Order Entry:



- 1) **Menu** This control button will always return the Menu Selection Controls to the “top” of the Menu; that is, to the first 25 Categories defined in your menu.
- 2) **Modifier** This control button will allow scrolling through multiple “lists” of modifiers, for those items that have been configured to take advantage of this feature in your menu.
- 3) **Whole** [ **1<sup>st</sup> Half / 2<sup>nd</sup> Half** ] - This control button will allow the order taker to designate certain modifiers, ingredients or toppings for only part of an item. For example, a Pizza might contain Green Peppers on the Whole Pizza, but only contain Onions and Olives on the 1<sup>st</sup> half.
- 4) **Page 2** [**Page 1**] - Some menu Categories, Items or Modifiers in your menu may be contained in lists greater than the 25 that can be shown on the screen at one time. To view these choices, press Page 2. To return to Page 1, touch Page 1.
- 5) **Finished** Once the check has been completed, press this control button to select a service type (if required) and complete the order.

### B. Menu Selection Control Window

DiamondTouch will guide the order taker through the order entry process with the Menu Selection Controls. The menu can be configured to automatically force choices for cooking instructions, included ingredients, sequenced modifier lists, optional modifier lists, and various other options designed to fit your individual order entry requirements.

Because actual menus can vary greatly, it is not possible to specify instructions for your individual menu. However, a typical order entry process might proceed as follows:

	<u>Category Selection</u>	<u>Item Selection</u>	<u>Modifier Selection(s)</u>
To Order Drinks :	<i>Soft Drinks</i>	<i>Diet Coke</i> <i>Ice Water</i>	<i>With Lemon</i>
To Order Meals:	<i>Menu, Subs</i> <i>Menu, Spaghetti</i>	<i>Roast Beef</i> <i>Pasta Supreme</i>	<i>Cheese, Onion</i> <i>Mushrooms</i>

Each italicized selection represents 1 touch of the Order Entry screen. Thanks to the graphical “visual cues” provided on the control buttons, the above order can normally be completed in just a few seconds !

To start the order, the user touches the Soft Drinks category button. The Category choices are replaced with the Menu Items listed under the Soft Drinks Category (such as Diet Coke, Sprite, Ice Water, etc). To add a Menu Item to a ticket, the user simply touches the control button.

## **1.20 Order Entry (cont)**

### **B. Menu Selection Control Window (cont)**

Depending on the menu, the user may then be presented with a choice of modifiers or included items from which to select, or the user may simply be presented with more Soft Drinks.

To continue with the above order, the user returns to the top of the menu by pressing the Menu button, and then presses the Subs category button. Selecting Roast Beef causes an automatic modifier list to appear, from which the user can select the Cheese and Onion choices. The user presses Menu, followed by the Spaghetti category button to access the Pasta Supremo. After adding the Mushrooms from the automatic list, the user presses Finished because the order is finished!

Adding, editing, inserting or deleting Special Comments, Price and Percentage Discounts, Delivery Charges, Ready Time, Customer Information, Table Number, Guest Counts, Price Adjustments, Tax Status, Item Quantities, and Customer Separations are all just a touch away. These features, and more, are detailed in the sections that follow.

### **C. Service Types**

Once an Order has been entered, a Service Type must be selected, either automatically, or by the user.

DiamondTouch allows for up to 8 different Service Types, such as Dine In, Take Out, and Delivery. Service Types can be each be designated to print different types of tickets to different printers, prompt for Ready Time, automatically add delivery charges, interface to the integrated dispatch system, automatically deduct sales tax, and report separate sales totals for the store as a whole, or even for each order taker individually.

Any Service Type can be set as a default on any station, which eliminates the need for the order taker to select a Service Type [ See Section 3.10 - A ]. A Service Type can be always be changed after it is selected, whether it was selected automatically or manually, by simply selecting an alternate Service Type.

### **D. Ticket Printing**

Once a Service Type has been selected, DiamondTouch will display the “Print Profiles” associated with that Service Type. A Print Profile is simply an instruction to the system to print the ticket to a designated Printer according to a designated Pattern. [See Section 3.10 - A]. Print Profiles might be named “Make Table” or “Guest Check”, and are always shown next to a small “Printer” Picture Icon.

To prevent a ticket from being printed, simply touch the Printer Icon, and the international “NO” symbol will appear over that printer. To turn that printer back on, simply touch it again and the “NO” icon will disappear. To finish the Order, press “Finish”, and the ticket will print to all printers indicated. DiamondTouch will then return you to the screen from which you entered Order Entry.

#### **1) New Tickets**

Whenever a new ticket is printed, the description “New Ticket” will appear at the top of the ticket. New tickets always contain all of the items on the ticket that were configured to print in your Ticket Setup program. For example, drinks will print at the bar printer, while salads will print at the salad make table [See Section 3.25 for more information on Ticket Print Setup Options].

## **1.20 Order Entry (cont)**

### **D. Ticket Printing (cont)**

#### **2) Additional Items Tickets**

Additional Items tickets are tickets that have been recalled, and have had items added to the order. Additional Items tickets will always be labeled as such when they are printed, and generally will only print those items that have been added to the ticket, and that pertain to the station to which they are printed. For example, added drinks will print at the bar printer, while added salads will print at the salad make table. Of course, printing options are fully configurable by the user. [See section 3.25]

#### **3) Revised Tickets**

A revised ticket is a ticket that has been recalled, but has undergone a more complex editing process than just a simple added item. Items may have been erased or replaced, quantities may have been changed, etc. Revised tickets will always be reprinted in their entirety to all stations - it is the responsibility of the person reading the ticket to compare the original order and note any changes.

#### **4) Updated Tickets**

An updated ticket is a special type of ticket. In the printer setup options, tickets can be set up with an option called "Full Ticket On Edit". "Full Ticket On Edit" means that even if only one item is added to a ticket, the entire ticket will be reprinted. While this feature probably would not be used in the kitchen, it can be useful in other situations, such as with Guest Checks that are to be presented to customers, and Delivery Checks that always need to have every item listed.

These tickets will be designated as "Updated Tickets" to notify staff that they are all-inclusive, and may include items or changes not included on the original ticket.

#### **5) Reprinted Tickets**

Reprinted tickets are just that; reprinted. They do not contain any changes from the original version; they are simply another copy of a ticket that has already been printed.

## 1.20 Order Entry (cont)

### E. Advanced Functions

DiamondTouch includes a full set of Advanced Functions, located just a touch away under the Advanced Functions control button. Some of these functions are protected by a dedicated security level, which requires that an employee security status meets a minimum level before they can be used [See Section 3.40-B for more information on setting security levels].

#### 1) Item - \$ New Price

Touching the New Item Price Discount feature will provide an on screen keypad upon which to enter the new discounted price for a selected item. For example, a 10.95 item could be discounted to 9.95 simply by keying in the new price. DiamondTouch will reflect the new price by adding a line item that appears as follows:

**Price Discount -1.00**

All discount entries are displayed in red, so that discounts can be spotted more easily. In addition, all discounts are tracked by discount type and will appear in the Discount Summary portion of the Daily and Period Sales Reports. [See Section 2.10 for more information on Sales Reporting].

If the new price is greater than the preset price, DiamondTouch will notify you that it cannot adjust the price as requested.

#### 2) Item - \$ Discount

This feature is virtually identical to the above feature, the one difference being that instead of entering in the new price of \$ 9.95, the user enters in the difference of \$ 1.00 as the discounted amount. In both cases, the end result on the ticket is the same.

#### 3) Item - % Discount

An item % discount will add an adjustment to the item price per the percentage entered by the user. For example, entering 20% for an item priced at \$10.00 will add a line item on the ticket that appears as follows :

**Percentage Discount - 2.00**

#### 4) All Above \$ Discount

This feature will apply the amount keyed in by the user as a discount to the entire ticket. For example, consider a ticket with the following line items :

1	Glass Red Wine	2.50
1	Sprite	1.25
1	Chef Salad	7.25
1	Spaghetti Dinner	8.75
	Subtotal	19.75

If you attempted to apply a 10.00 discount using an Item Discount, DiamondTouch will alert you that the discount is too high for any of the selected items. Instead, use the "All Above" discount feature which will allow a discount up of to the 19.75 subtotal amount. The resulting line item would appear as follows:

**Above Price Discount - 10.00**

## 1.20 Order Entry (cont)

### E. Advanced Functions (cont)

#### 5) All Above % Discount

An item % discount will add an adjustment to the full ticket price, up to the currently selected item, per the percentage entered by the user. For example, entering 20% for the above example would add a line item on the ticket that appears as follows:

**Above % Discount - 3.45**

Note that the discount is calculated at the time the discount is issued. If items are subsequently added, the amount of the discount does not automatically recalculate. If automatic recalculation is required as new items are added, then the Price Adjustment feature should be used instead of the Above % Discount feature (see below).

#### 6) Price Adjustment

Price adjustments offer a more flexible way to apply percentage discounts, or gratuities, to an entire ticket. Up to 10 different Price Adjustments can be programmed in advance, each with their own security level [see Section 3.25 - E for more information on setting up your Price Adjustments]. In addition, a “floating” Price Adjustment has been provided which allows the user to enter a special description and adjustment level for each ticket.

To apply a Price Adjustment, touch Advanced Functions, Price Adjustment, then touch the desired Price Adjustment (for example, “Employee”) and press OK. Once a price adjustment has been assigned to a ticket, it appears at the bottom, just after the subtotal amount, as follows:

**Employee: 50% 12.50**

Note that taxes are calculated per the amount of the subtotal and price adjustment together. So, in the case of a price adjustment that is a discount, the effective tax will be lower.

Also, note that all Price Adjustments will be tracked and reported in the Price Adjustment Summary portion of the Daily and Period Sales Reports. [ See Section 2.10 for more information on Sales Reporting ].

#### 7) Customer

DiamondTouch offers an extensive set of features and reporting for tracking your individual customers. Generally, customer information will already be assigned to the ticket, if Order Entry is accessed via the Phone Order button on the Main Menu [ See Section 1.80 for more information about Phone Orders]. Touching the Customer button will return you to the Customer Information screen to allow convenient editing of your customer information, if you wish to do so. [NOTE: Customer Information is addressed in more detail in Section 1.85].

If a ticket is in process, and you wish to assign it to a customer after the fact, simply touch the Customer button under Advanced Functions. DiamondTouch will prompt you for a Customer Phone Number, if one has not already been assigned to the ticket. DiamondTouch will then route you to the appropriate customer record, or open a new record if a matching phone number was not found. To return to Order Entry, press Next on the Customer Information Screen.

## 1.20 Order Entry (cont)

### E. Advanced Functions (cont)

#### 8) Delivery Charge

DiamondTouch allows for automatic delivery charges, which can be set up according to a customer's street address and delivery area. [See section 3.50 E for more information on setting up Delivery Areas.]

The Delivery Charge button under Advanced Functions can be used to over-ride the automatic delivery charge, if any, with a manually entered delivery charge amount. Once this manual Delivery Charge has been attached to a ticket, the automatic Delivery Charge setting for the ticket will be ignored, even if the ticket is recalled later.

Total delivery charges are summarized as a line item under the Sales by Category section of the Daily and Period Sales Reports.

#### 9) Add a Separator

Separators are used to create separate subtotals on printed tickets, for guests wishing to pay individually. To use a separator, first apply all items for the first guest to the ticket. Next, touch Advanced Functions, then Add a Separator. A line item will be added to the ticket that appears like the following :

=====

Next, add all of the items for the 2<sup>nd</sup> guest, add another separator, and so on until the ticket is completed. You may wish to add a comment before or following each separator, such as "Seat 3", to assist you in editing the ticket later.

When the ticket is printed, separate subtotals will appear following each separator to assist your guests and your cashiers in settling the bill. Of course, when editing the check you should insert new items into the proper sections of the check to maintain the integrity of the totals for your guests.

#### 10) Add a Comment

On rare occasions, you may find it necessary to convey ordering information that was not foreseen by the person that created your menu. For example, you may have one guest that prefers to add an unusual ingredient or that requires some special substitutions or preparation instructions, such as "Allergic to Wheat".

To add a comment to the ticket, touch Advanced Functions, then Add a Comment. A "virtual keyboard" will appear on the screen that can be used to "touch type" in your comment on the touch screen, or if you prefer, you can simply use your keyboard. When you are finished, press the Enter key.

Note that your comment now appears on the ticket, highlighted in Violet.

## 1.20 Order Entry (cont)

### E. Advanced Functions (cont)

#### 11) Ready Time

For some orders, it might be desirable to print the required ready time on all tickets for that order. That way, the salad make table, the sub make table and the gourmet cook all know that Pick Up order #101 will not be required for another hour.

DiamondTouch can be configured to automatically prompt the Order Taker for the number of minutes in which the order must be ready. This automatic prompt can be tied to the Service Type, so that all Pick Up orders, for example, always prompt for ready time.

If you do not wish to set up the system to prompt for Ready Time on every ticket, or the Service Type for your ticket does not require Ready Time, you can always add Ready Time to any ticket by touching Advanced Functions, then Ready Time. On the keypad that appears on your screen, simply enter the number of minutes from the current time that the order must be ready. Once Ready Time has been entered, when the ticket is printed, the bottom of the ticket will read, in wide print:

**Ready Time: 12:45**

#### 12) Tax Exempt

Tax-Exempt is used to eliminate all taxes from a specific ticket. Once a ticket has been marked as tax exempt, this same control can be utilized to remove the tax exempt status from the ticket, by returning it to "Taxable" status.

DiamondTouch offers the ability to configure 10 different tax categories, and assign a tax category to each item individually. Additionally, tax exempt status can automatically be assigned to a specific Service Type. The tax-exempt button is generally only used to change the tax status of a single ticket. [See Section 3.15 C for more information on Tax Set Up.]

## 1.20 Order Entry (cont)

### F. “Smart Check “ User Interface

One of the most powerful features in DiamondTouch Order Entry is the way in which the user can interact with the graphical Smart Check display. More than simply a display of the order as it is entered, this Smart Check user interface can also be used to intuitively edit the ticket in a number of remarkable ways.

To edit a ticket at any time during the order, simply touch the line item of the ticket you wish to edit.

For example, let’s say you want to change the quantity of a drink item. Perform the following steps:

- 1) Touch the Drink Item on the Smart Check;
- 2) Touch the Quantity Button on the Edit Control Bar at the bottom of the screen;
- 3) Enter the New Quantity, and press Enter



Note that the new quantity is displayed, and all of the pricing has been updated automatically. This process of touching the item to be edited, then entering the change, is used for all ticket edit functions on the system. In addition to changing the quantity of an item, you can insert and delete line items, replace modifiers, insert separators, comments or discounts anywhere on the ticket, and even change a medium pizza to a large pizza and watch all of the topping prices change automatically ! Because the Menu Selection Control Window automatically finds the group containing the line item you have touched, changing from a Regular Coffee to Decaf is a snap - just 2 touches of the screen and you’re done. [Note: See section 3.15 A] for more information.]

Any discussion about ticket editing should always raise some concerns about security and audit control. Please note that for audit control purposes any edit operations done to recalled tickets that result in a lower overall ticket value will be singled out and logged in the Daily Event Log. In addition, many edit operations cannot be performed at all unless the Order Taker holds the proper security level. Finally, DiamondTouch provides full accountability and 100% trace-ability for any and all edits performed on recalled tickets, whether they resulted in a lower value or not. In fact, thanks to a unique data-compression methodology, DiamondTouch is able to retain a complete ticket history for all tickets that can be viewed by a Manager at any time during the day, later in the week, months or even years later. [NOTE: See Section 2.25 for more information on Ticket Detail Reporting] The following sections provide more detail on the editing capabilities of the “Smart Check” User Interface.

## 1.20 Order Entry (cont)

### F. “Smart Check “ User Interface (cont)

Once any line item on the Smart Check is touched, the Order Entry screen is automatically reconfigured to **Editing Ticket** mode. This initiates a number of changes to your screen:

- The yellow **Cancel** button in the upper left portion of your screen is changed to the red **Back To Order** button. Use this to return from Editing Ticket Mode to Order Entry Mode at any time.
- The Menu Selection Control Window automatically display the appropriate screen to facilitate a quick replacement from within the category of the selected item, modifier or include list.
- The Primary Control Bar at the bottom of the screen is replaced with the Edit Control Bar, which provides the ability to perform all of the Editing Ticket functions.

“Editing Ticket” mode provides for a number of editing operations, all of which can be performed with a minimum number of screen touches. These operations are discussed in more detail below.

#### 1) Automatic Menu Item Replacement

To speed up your editing operation, the Smart Check “assumes” that you want to replace the selected item, until you indicate otherwise, as soon as you touch any line item. This is why the Menu Selection Control Window automatically finds the listing containing your selected item. Whether it is a Menu Item from the Drinks Category, an Included item from the Includes List, or a Cooking Instruction from an optional Modifier List, Smart Check finds that list to facilitate a **One-Touch Replacement**.

This feature is particularly useful for operations that include Pizzas on their menu. For example, let’s say your customer has ordered a Medium Pizza with New York Crust, Tomatoes and Onions on the Whole Pizza, ½ Pepperoni , Sausage and Extra Cheese, and ½ Green Peppers and Meatball. Then, after completing the order, your customer has a sudden change of heart and decides to make this a Large instead of a Medium. Simply touch the Medium Pizza on the Smart Check, and the Menu Selection Control Window will display all of your Pizza choices. Touch Large Pizza, and watch all of the modifiers and prices on the check adjust to the Large Pizza selection automatically. Your Order Entry screen will return to Order Entry mode automatically, because your change has been completed!

Of course, with any feature this powerful, there are a few ground rules. One Touch Replacement of a Steak Dinner with a Large Pizza would not make a lot of sense, since the “Medium Rare” and “Baked Potato” menu modifiers on the Steak Dinner would not make for a very appetizing Large Pizza. This is why your Menu Designer has configured only certain Menu Items within a given Menu Category with the “Allow Item Exchange” feature. [See section 3.15 A for more information on Menu Configuration and Setup.] DiamondTouch will not allow you to automatically replace any item that has not been configured to take advantage of this powerful feature. Under the above scenario, it would probably be wiser to add, or insert, the Large Pizza, and then simply Erase the Steak Dinner.

For Menu Categories with “like modifier lists” such as Soft Drinks, Desserts, Subs, Sandwiches, Pizzas, Salads, etc., this single tool can provide a significant boost to your productivity.

## 1.20 Order Entry (cont)

### F. “Smart Check “ User Interface (cont)

#### 2) Modifier Replacement

To replace any modifier with an alternate modifier from the same listing, follow these steps:

- Touch the Menu Modifier you wish to replace on the Smart Check;
- Touch the replacement Menu Modifier from the Menu Selection Control Window

Note that your Menu Modifier has been replaced, and any pricing adjustments have been made automatically.

#### 3) Includes Replacement

Some of your Menu Items may have been configured with a list of up to 16 normally included ingredients or cooking instructions, called an “Includes List”. This list always pops up automatically whenever these Menu Items are selected. “Includes” always appear on the Smart Check in Green.

To edit an includes list selection, touch the “Include” line item on the Smart Check. The complete list of includes will appear in place of the Menu Selection Control Window, and the Includes that you have already selected for that item will be highlighted in Red. You may select or de-select as many includes as you want, then press OK. Your Includes will all be updated automatically, and you will be returned to normal Order Entry mode.

#### 4) Insert Item

To insert an item, touch a Menu Item or a Separator on the Smart Check. When your Edit Control Bar appears, note that the Insert Item control caption is Black. This means that it is enabled for operation. When other line items on the Smart Check are touched, such as Menu Modifiers or Comments, the Insert Item control caption will be gray, which means that it has been disabled. You cannot insert items into the middle of Menu Modifier Lists, or between Comments and the Menu Items to which they have already been associated.

Once the Insert Item control has been enabled by touching either a Menu Item or a Separator on the Smart Check, touching the Insert Item control once will move all of the line items down one row to allow room for the new Menu Item to be inserted. The Edit Control Bar will once again be replaced by the Primary Control Bar, since you will need your normal controls to add the new item.

Use the Menu Selection Control Window to add the new item as you normally would. The Smart Check will remain in Insert Mode until you have completed adding all of the includes, Menu Modifiers, etc to the new Menu Item. Once you are finished, simply touch Back to Order, or the Menu control, to return to normal Order Entry mode. You have now completed the Insert Item Operation.

Of course, you can also use Insert Item to insert any of the Discount Types, Comments and even Separators.

## 1.20 Order Entry (cont)

### F. “Smart Check “ User Interface (cont)

#### 5) Adding a Modifier

You may wish to add Menu Modifiers to a Menu Item on your order after you have completed ordering the item. For example, you may wish to add Chives to a Baked Potato.

To use Add Modifier, the Menu Item must have been previously configured with either an Optional Modifier List, or with a list with a Required count of zero (0). For more information on configuring your Menu, please see section 3.15 – A.

To add a Menu Modifier, touch a Menu Item on the Smart Check and then touch Add Modifier on the Edit Control Bar. The Menu Selection Control Window will automatically find the first available modifier list for the selected Menu Item. The Edit Control Bar will once again be replaced by the Primary Control Bar, since you will need your normal controls to add the menu modifiers.

If the menu modifier list you see is not the list you need, you can use the Modifier control on the primary control bar to cycle through the available lists. Remember, if a list contained a required amount of modifiers, you will need to Replace the modifier since you cannot add another modifier from this type of modifier list.

#### 6) Quantity

To increase the overall speed of Order Entry, all Menu Items are automatically given a default quantity of one (1). This is because in the vast majority of cases, one (1) will be the quantity of almost every item ordered. To require the Order Taker specify a quantity of (1) for every item ordered, manually, would slow down the order entry process unnecessarily

Changing the quantity of a Menu Item after it has been ordered is very simple process:

- Touch the Menu Item on the Smart Check
- Touch the Quantity Button on the Edit Control Bar at the bottom of the screen
- Enter the New Quantity, and press Enter

The new quantity, along with any and all price changes, will automatically be reflected on the Smart Check.

#### 7) Erase

To erase any Menu Item on the order, simply touch the Menu Item and then touch the Erase Control Button on the Edit Control Bar. The Menu Item, along with any Includes or Menu Modifiers will be deleted from the Smart Check.

Erase can also be used to erase Includes, Comments, Separators and Discounts. Modifiers can also be erased, provided that the modifier was not part of required modifier list. Required modifiers can only be replaced, since the intent of your Menu designer was to force a fixed number of required choices from that list.

**1.20 Order Entry (cont)****F. “Smart Check “ User Interface (cont)****8) Table Number**

To change the table number associated with an order, touch the Table box in the upper left hand portion of the Smart Check User Interface. Enter the new Table Number and press Enter.

The new Table Number will now allow you to recall the ticket by touching the same table on the integrated Table Management Screen [See section 1.50 for more information on Table Management.]

**9) Guest Count**

To change the Guest count on an order, touch the Guests box located in the upper right hand portion of the Smart Check User Interface. Enter the new guest count and press OK.

The new guest count will now be taken into account when tabulating various report totals and sales averages within the Manager reports section, and on the Server Reports available from the Server Status screen [Section 1.70].

## 1.25 Ticket Recall

The Ticket Recall function is designed to allow the Order Taker to reload a previous order back into the Order Entry Screen for review and possible editing, such as adding items or changing the Service Type. DiamondTouch provides a variety of Ticket Recall options:

- Recall By Ticket Number
- Recall By Table Number
- Recall By Customer Name
- Recall By Customer Phone Number
- Recall By Selecting from a list sorted by Order Taker, Driver, Service Types, Open/Closed Status or by any combination using the Ticket Status Screen;

By learning how to use the Ticket Recall methods appropriate to your operation, your order taker can recall and edit any order in just a few seconds.

### A. Recall by Ticket Number

If you already know the ticket number, one simple way to recall a ticket is to:

- Touch Recall Ticket from the Main Menu
- Enter the ticket number on the keypad that appears on your touch screen, and touch Enter

You will be immediately brought back into the Order Entry screen with the order you specified displayed on the Smart Check interface.

Please note that once a ticket has been cashed out, or “closed”, the ticket can no longer be recalled for editing, for obvious audit control reasons. You can always view and reprint any ticket, of course, even if it has been closed out.

### B. Recall by Table Number

DiamondTouch includes a very flexible integrated Table Management module for your Dine In operation. In fact, many users find that they can use the Table Management “Floor Plan” style user interface as the main screen from which to run their operation. Table Management is discussed in greater detail in Section 1.50.

To recall a ticket from the Table Management screen, simply touch the table. Any and all tickets associated with that table during the shift will appear in a pop up box. If there is more than one ticket, left and right indicators provide the means for you to browse through the available tickets. Touching the Recall Ticket control will cause the selected ticket to be recalled, and you will find yourself back at the Order Entry screen with the order you specified displayed on the Smart Check interface.

NOTE: The Table Status Mode check box in the upper right hand corner of the screen must be unchecked to allow for Recall Ticket by Table Number.

## 1.25 Ticket Recall (cont)

### C. Recall by Customer Name

On occasion, it may be useful to recall a ticket by a customer's last name, particularly for Pick Up orders.

DiamondTouch provides a very convenient method for recalling tickets by customer name. From the Main Menu, touch Recall Ticket, then touch the Names control at the bottom left of the pop up keypad box. All non-dispatch type tickets found with customer names will appear alphabetically in a scrolling list. Simply select the name and press recall ticket. The ticket will appear in the Order Entry screen.

If you wish to recall the ticket by name in order to cash it out, then it may be preferable to first touch Cash Out from the Main Menu. From the Cash Out screen, touch "Enter Ticket #", then touch "Names" from the keypad as noted above. After selecting your ticket, the items ordered and total amount will load automatically into the Cash Out Screen. The Cash Out screen is discussed in greater detail in Section 1.35.

To make the Ticket Recall by Name feature more useful for the applications most likely to use it, DiamondTouch automatically filters out orders associated with "Dispatch" Service Types. This way, the list of names is not lengthened unnecessarily with Delivery orders, for example, that are best recalled by Phone Number. [See Section 3.25 A for information on setting the Dispatch property for Service Types].

### D. Recall by Customer Phone Number

For Phone Orders, DiamondTouch offers a completely transparent method to recall a ticket by phone number.

Each time a phone order is placed, either manually or with the optional Caller ID interface, DiamondTouch scans the open orders for matching phone numbers. If one or more are found, a pop up window appears displaying the tickets. If there is more than one ticket, left and right indicators provide the means for you to browse through the available tickets. Touching the Recall Ticket control will cause the selected ticket to be recalled [Phone Ordering is covered in greater detail in Section 1.80.]

### E. Recall Using Ticket Status

The Ticket Status feature in DiamondTouch provides a number of useful features, including Ticket Recall. To recall a ticket using Ticket Status, simply touch the ticket you wish to recall and then touch the Recall Ticket control at the bottom of the screen. The ticket will then appear in the Order Entry Screen.

Of course, the primary benefit in using Ticket Status to Recall a Ticket lies in the ability of the Ticket Status module to customer sort groups of tickets together for selective browsing. For example, if you do not know the Ticket Number, Table Number or the Customer Information attached to a ticket, you can still search all tickets and "filter" the list by Server, Driver, Service Type(s), etc to make your search more manageable. This is accomplished by adjusting the Display Options located at the bottom of the Ticket Status screen. [The Ticket Status feature is discussed in greater detail in section 1.60.]

### 1.30 Ticket Reprint

Reprinting a ticket can be accomplished in a number of different ways, including

- Reprinting from Ticket Status Screen
- Reprinting from Table Management
- Reprinting from Order Entry

Each of these options is discussed below:

#### A. Reprinting from Ticket Status

To reprint a ticket from the Ticket Status Screen, select the ticket you wish to view by touching one of the white fields - the ticket fields will turn blue once the ticket has been selected. Next, touch View Ticket. A pop up box will appear displaying the basic details of the ticket you selected. Touch the All Profiles button, select the ticket profile you want to reprint and touch Reprint on the pop-up box.

#### B. Reprinting from Table Management

To reprint a ticket from the Table Management screen, simply touch the Table Number associated with the ticket. After selecting the correct ticket from the list that appears, touch the Reprint Ticket control at the bottom left portion of the screen.

The ticket will be reprinted at the first “local” printer found on the list of printers for your current terminal; if no “local” printer is found on your terminal, the ticket will be “spooled” to the first system printer found. For more information on setting up local and system printers, please see Section 3.20.

#### C. Reprinting from Order Entry

Reprinting a complete ticket from the Order Entry Screen is possible as long as at least one (1) of the eight (8) possible Ticket Profiles for the Service Type associated with that ticket was configured with a Pattern that was set to print the “Full Ticket on Edit”. In this case, the reprint will occur at the printer specified automatically, even if no changes are made to the ticket.

To reprint from Order Entry, recall the ticket and press Finished, then Finish. The ticket will reprint at a selected station, as long as you’re print setup was configured to do so. For more information on setting up local and system printers, please see Section 3.20.

### 1.35 Ticket Cash Out

Ticket Cash Out provides an on-screen “Cash Register” from which you can settle payment for a single ticket. Payments can be made to Cash, Check, or to any one of ten (10) alternate Tender Methods (VISA, MasterCard, Coupons, Employee Comp, etc) that have been configured for your system. Split tenders are also easy to perform, as are split tickets, where individual items on a ticket can be highlighted one at a time, or in groups of items, for payment. And yes, you can even do split tenders and a split ticket at the same time with the same ticket. Each tender operation is stored as a separate transaction for reporting purposes. Transactions can even be exported to Microsoft Excel for even more detailed reporting.

Before you can ring up a transaction, your DiamondTouch terminal must first be configured with a Cash Drawer [Section 3.10-A] and the user must carry the proper security level [Section 3.40 B]. Physical cash drawers can be integrated, but are not required. DiamondTouch can easily be configured with a “Virtual Cash Drawer” that simply tracks transactions without actually opening a mechanical drawer.

The register must be opened, and each user must sign on to either Drawer 1 or Drawer 2 before running the first transaction of the day. If either of these operations have not yet occurred, DiamondTouch will guide you through the short process. [For more information on Signing On to a Cash Drawer, see section 1.40 - A] When a Register is opened, DiamondTouch will prompt the user for the starting cash amount. This is the amount of cash in the cash drawer before the first transaction has occurred. Once signed on, it is not required that the user sign on again until the following day.

The Cash Out screen can be accessed via the Main Menu, the Ticket Status screen, the Order Entry Screen or the Table Management Screen.

#### A. Standard Transaction

When a customer presents a check for payment, touch the Cash Out control button on the Main Menu to access the Cash Out screen. Touch the Enter Ticket # button and enter the Ticket Number from the customer’s ticket. The ticket order information will be loaded onto the display on the left, and the amount due will be detailed in the upper right of the screen.

If the payment is offered in exact change, simply touch the appropriate tender key (for example: Cash) and the transaction will be completed. If change is owed, key in the amount tendered on the Register keypad, and then touch the appropriate tender key. The change due to the customer will be displayed on the screen, the cash drawer will open, and a receipt will print, if your system has been configured to do so. [See section 3.10 A for the Cash Drawer configuration options.]

#### B. Split Tender Transaction

For a split tender transaction, remember to always key in the lowest tender amount first, so that the tender will not finalize prematurely. For example, let’s say that a customer wishes to pay for a \$15.00 ticket with a \$2.00 Coupon and a \$20.00 bill. The proper tender operation would be to first key in the \$2.00 coupon, and allow the register to show \$13.00 still due. Next, key in the \$20.00 cash so that the register will properly show the \$ 7.00 change owed to the customer.

If the \$20.00 is keyed in first, then the 15.00 amount of the ticket would be more than satisfied, the transaction would be over, and the \$2.00 Coupon could never be entered. Worse, the amount owed the customer would incorrectly show \$5.00, resulting in an under-ring condition. The drawer would now be short \$ 2.00 cash (and over \$2.00 in coupons collected). It is therefore a good habit to always key in the smaller amount first. Also, note that once a split tender operation has started, you must complete the transaction before exiting the Cash Out form.

### 1.35 Ticket Cash Out (cont)

#### C. Split Ticket

To ring up a Split Ticket transaction, access the cash out screen and enter a ticket number for a ticket that has at least two (2) items on it. Before ringing up the ticket, touch one of the items on the ticket displayed on the left of the screen.

Note that the selected items have been highlighted in blue, and a new subtotal window has appeared detailing the split amount due for the items selected. You can select and deselect items simply by touching them.

Enter the amounts tendered for the highlighted items. Once the split amount due has been satisfied, a receipt will print for the split amount and you may now select the items for the next part of the check to be tendered. Complete each split operation until the entire ticket has been highlighted and all amounts have been satisfied. When completed, the display in the upper part of the screen will read "CASHED OUT".

#### D. No Sale

A No Sale transaction is designed to do only one thing: open the cash drawer. This action is logged as a transaction, however, and the user name, time, date and other information is stored just as any other transaction would be. In addition, the No Sale function does have a dedicated security level assigned to it - the user must have the proper security level before it is possible to use this function.

To ring a No Sale transaction, touch Cash Out to bring up the Cash Out screen, then touch No Sale. The cash drawer will open.

### 1.37 Voiding a Ticket

Voiding a ticket in DiamondTouch does not "erase" a ticket completely, although it does remove all of the items and totals on the ticket from the primary report totals. Every Void Ticket operation will be logged as an exception event, and will appear on the Exception Event Log Report [ see section 2.25 B ]. In addition, the complete ticket history never actually disappears. It can always be viewed using either the Event Log Report or the Ticket Detail Report via the "drill down" Ticket History feature. Finally, the Void Ticket operation is protected with a dedicated security level. An employee without the required security level cannot perform this operation.

To void a ticket, touch Void Ticket from the Main Menu. Enter the ticket number and then an explanation for the void operation when prompted. Press enter to complete the operation.

Tickets that have been cashed out can be voided, but, once again, the original tender transactions are not erased; they are simply appended with matching entries to maintain the integrity of the audit trail.

Note that all VOID tickets are highlighted as such on the Ticket Status screen, and in the Ticket Detail Logs.

## 1.40 Register Information

Register Information is accessed via the Main Menu Cash Out control button. The Register Information screen will display the totals for the current drawer to which the user is signed on. In addition to displaying totals for the various tender types, Register Information will display the amount of Cash Pulls, Driver Reimbursements, No Sales, Pay Outs and provides a quick means to display transaction data. Additionally, two (2) special types of transactions are actually performed from the Register Information screen: Pay Outs and Cash Pulls. Finally, the Cash Drawers are also closed from the Register Information Screen.

The following requirements must be met before you can access Register Information:

- At least one Cash Drawer must be set up for your terminal [Section 3.10 A]
- Your user Security Level must permit Drawer Access [Section 3.40 B]
- You must be signed on to a Cash Drawer - See Below;
- The Cash Drawer must be opened - See Below;

### A. Signing On to a Register

Signing On to a register is easy. The first time you attempt to view Register Information or run a Cash Out Transaction, Diamond Touch will prompt you with “User is not signed on to a Register. Do you wish to sign on to Drawer 1?” If you wish to use Drawer 1, simply touch “Yes”.

If your terminal operates with 2 Cash Drawers, and you wish to use Drawer 2, simply say “No”, and then answer “Yes” when DiamondTouch asks if you want to sign on to Drawer 2. Once you have signed on to a cash drawer, you will remain signed on until the drawer has been closed out - you will not need to sign on again for every subsequent transaction.

### B. Opening a Cash Drawer

If the Cash Drawer to whom you wish to sign on has not yet been opened, DiamondTouch will notify you with the Message : “Register is Closed. Would you like to open it?” Answer Yes, and DiamondTouch will prompt you for the “Starting Register Amount”. Enter in the amount of cash in the drawer and then press enter. Touch the Manager button in the upper left and the Register Information screen for the Cash Drawer you just opened will be displayed.

## 1.40 Register Information (cont)

### C. Register Information Display

#### 1) Receipts

The column of figures located on the left side of the Register Information screen represent the running subtotals of each tender method configured for your system. Each time a ticket is cashed out, the total amount keyed in is added to the accumulator for that tender method.

For example, let's say that 2 tickets are cashed out to VISA, one for \$10.00 and the other for \$5.00. The VISA subtotal under the receipts column will therefore read \$15.00, the sum of the 2 totals.

All totals represent the gross amount of the transaction, with the exception of CASH. All change issued is assumed to be cash, and change is always deducted from the CASH accumulator, for all tender methods. For example, before ticket # 44 is cashed out, the Register accumulators read as follows:

CASH	100.00
Checks	100.00
Total	200.00

When ticket # 44 is presented, the total amount due is \$8.00. The customer pays with a check, but writes the check for \$10.00. When the transaction is rung up, the display on the Cash Out screen reads \$2.00 change. The new Register Receipt Totals will now read as follows :

CASH	98.00
Checks	110.00
Total	208.00

Note that the Cash accumulator has actually been reduced by \$2.00 to account for the \$ 2.00 change issued for ticket #44. The check total has increased by 10.00, since there is now one more check for that amount in the drawer. The Total Receipts properly reflects the increase in net sales for the \$8.00 ticket. CASH is therefore the net difference between Cash Receipts and Change issued for all tender methods.

The Total Receipts will always reflect your total sales totals, once all tickets have been cashed out. The yellow Total Receipts number at the bottom of the column is copied to the Total Receipts reading in the upper right portion of the screen to reconcile cash in the drawer, as explained below.

#### 2) Starting Cash

Starting Cash is the amount that was keyed in by the user that opened the Cash Drawer. This should normally be your "Opening Bank" for the drawer.

#### 3) Total Receipts

Total Receipts is the total of all receipts from the left portion of the screen. This number will always match the yellow "Total" under the Receipts detail.

## 1.40 Register Information (cont)

### F. Register Information Display (cont)

#### 4) Cash Pulls

Periodically, you may wish to pull cash from the Cash Drawer to limit your exposure to theft. This action can be performed and logged on the Register Information screen to maintain the integrity of the Cash in Drawer totals [See 1.40 - G]. Each time a Cash Pull is performed on a Drawer, the Cash Pulls accumulator will reflect the new subtotal.

#### 5) Pay Out

Pay Outs represent cash taken out of the drawer to pay Vendors or Employees for miscellaneous goods or services. For example, you may have a cleaning service that you need to pay on a cash basis. To maintain the integrity of the Cash in Drawer totals, these transactions should be recorded on the Cash Drawer using the Pay Out function [See Section 1.40 H, below]. Each time a Pay Out is performed, the Pay Out accumulator will reflect the new Subtotal.

#### 6) Reimbursements

When cashing out delivery drivers, DiamondTouch allows you to key in a set amount per ticket for Driver Reimbursements. [See section 1.90 G for more information on Delivery Management]. If this feature is used, then the Reimbursements are reported as a separate line item on the Register Information screen to maintain the relationship of the Receipts Totals to Total Sales. For example, before a driver cashes out delivery ticket # 55, the totals read as follows :

	Starting Cash	100.00
Cash 200.00	Total Receipts +	200.00
	Reimbursements -	10.00
Total 200.00	Cash Subtotal	<u>290.00</u>

Delivery Ticket #55 was a \$20.00 ticket, but during Cash Out the Cashier indicates that the driver is to receive a \$3.00 per ticket reimbursement for use of the driver's vehicle. Following the transaction, the Totals will read as follows :

	Starting Cash	100.00
Cash 220.00	Total Receipts +	220.00
	Reimbursements -	13.00
Total 220.00	Cash Subtotal	<u>307.00</u>

Note that the Cash Receipts and Total Receipts accumulators have increased by the \$ 20.00 amount of the ticket to reflect the gross sales value of the ticket. Driver Reimbursements, however, have also increased by \$ 3.00, so the new Cash in Drawer Subtotal has only increased by \$ 17.00 - the difference between the amount collected from the customer and the amount paid to the driver.

There are several options for setting reimbursements:

- Dollar amount per run
- Dollar amount per ticket
- Percentage of delivery charge
- Percentage of gross sales
- Force manual entry

**1.40 Register Information (cont)****C. Register Information Display (cont)****7) Total**

As shown on the Register Display itself, Total represents the net total of the Starting Cash, (+) All Receipts, (-) Cash Pulls, (-) Pay Outs and (-) Driver Reimbursements from this Cash Drawer. This total does include all checks, credit cards etc from total receipts.

For a cash only total to perform quick cash audits on the drawer, use Sub Total Cash Only, described below.

**8) Sub Total Cash Only**

The Sub Total Cash Only represents the actual Cash In Drawer total. This total should be used to perform cash counts when closing the drawer, or for "X" totals during the day. The following formula is used to achieve this total :

+	Starting Cash
+	Cash Receipts
-	Cash Pulls
-	Pay Outs
-	<u>Reimbursements</u>
=	Subtotal Cash Only

**9) No Sales**

The No Sales accumulator reports the total number of times during the day that the NO SALE button was used to open the cash drawer. Additional detail on which, what and when the NO SALES activity occurred is available via the View Transactions feature. See Section 1.40 D below.

**10) Void**

The VOID accumulator reports the number of times during the day that cashed out tickets were Voided. Additional detail on which, what and when the Void activity occurred is available via the View Transactions feature. See Section 1.40 D below.

## 1.40 Register Information (cont)

### D. View Transactions

The View Transactions control at the bottom left portion of the Register Information screen will display all transactions for the currently open drawer. Transaction information detailed includes the following:

- Time the Transaction Occurred in military time format
- Ticket Number /Alternate Transaction Code. Alternate Transaction codes are :
  - SC = Starting Cash [ See Section 1.40 B]
  - SB = Starting Driver Bank [ See Section 1.90 B]
  - RB = Returning Driver Bank [ See Section 1.90 G]
  - CP = Cash Pull [ See Section 1.40 G]
  - PO = Paid Out [ See Section 1.40 H]
  - NS = No Sale [ See Section 1.35 D]
- Description - Ticket Transactions will include the full Ticket Value under this heading;
- Cashier - this is the name of the employee that was signed on to the terminal when the transaction occurred;
- Amount - this is the amount that was keyed in for this transaction;
- Tendered - Generally, this is the Tender Method (Cash, Check, Credit Card, etc). In the case of a Driver Reimbursement transaction, the name of the driver is listed instead.
- Chg / Due - a running total of how much of the total value is still due, or the amount of change that was issued for this transaction;

### E. View Selected Transactions

The Register Information screen will also allow the user to view Selected Transaction Types only. The following transaction types can be viewed as separate reports:

- Cash Pulls
- Pay Outs
- No Sales
- Voids
- Alternate Tender Types (VISA, Etc) other than Cash or Check.
- Reimbursements
- Driver Banks

To view a report of alternate transaction types, simply touch the accumulator or descriptor field on the Register Information Display. The indicator will turn Violet when it is selected. Next, touch View Transactions. The Transaction detail report will only those transaction type that you have highlighted.

For example, to view a list of NO SALE transactions, touch the NO SALE display to make it turn Violet. Touch view transactions, and only the NO SALE transactions will be listed.

### F. Print Transaction Report

To print the current listing of transactions, first View the Transactions, then touch Print to Parallel Printer. The current transaction listing will then print to your Windows Default Printer.

## **1.40 Register Information (cont)**

### **G. Cash Pull Transaction**

Periodically, you may wish to pull cash from the Cash Drawer to limit your exposure to theft. This action can be performed and logged on the Register Information screen to maintain the integrity of the Cash in Drawer totals.

To perform a Cash Pull transaction, touch the Register control button on the main menu to view Register Information. Next, touch the Cash Pull control button. Enter the amount of the Cash Pull, and press enter. Note that the total amount of the Cash Pull accumulator has increased by the amount entered. If you have a local printer, a Cash Pull receipt will print. You may wish to save the receipt in the drawer for accounting purposes, or attach it to the cash pull envelope, depending on your particular cash handling procedures.

Each time a Cash Pull is performed on a Drawer, the Cash Pulls accumulator will reflect the new subtotal, and a permanent transaction will be recorded logging the event. You may view the transaction with the View Transactions feature (Section 1.40 D).

### **H. Pay Out Transaction**

Pay Outs represent cash taken out of the drawer to pay Vendors or Employees for miscellaneous goods or services. For example, you may have a cleaning service that you need to pay on a cash basis. To maintain the integrity of the Cash in Drawer totals, these transactions should be recorded on the Cash Drawer using the Pay Out function.

To perform a Pay Out transaction, touch the Register control button on the main menu to view Register Information. Next, touch the Pay Out control button. Enter the amount of the Pay Out transaction and press enter.

Next, select the Pay Out Vendor from the list provided. [See section 3.30 C for more information on setting up Pay Out Accounts.] Alternately, you may also choose "OTHER" if the correct vendor is not displayed. There is also an option to select an employee as a vendor. Simply touch "Employees" and the Vendor List will be replaced with a list of employees. Once the Pay Out account has been selected, press Enter to complete the transaction. (You may cancel the transaction at any time by pressing Cancel.) If you have a local printer, a Pay Out receipt will print. You may wish to save the receipt in the drawer for accounting purposes.

Note that the Paid Out indicator has increased by the amount of the transaction. You may also view the Pay Out transaction by pressing View Transactions [See Section 1.40 D].

### **I. Detail**

Detail represents the most recent activity at a selected cash drawer. To review a selected cash drawer, select Cash Out on the main menu. Then touch the Manager button at the top left of the screen and then touch the Detail button at the bottom of the screen.

### **J. View All Drawers**

View All Drawers provides you with a Cashier Summary Report of all cash drawer activity throughout the day. To review the report, select Cash Out on the main menu. Then touch the Manager button at the top left of the screen and then touch the View All Drawers button at the bottom of the screen.

## 1.40 Register Information (cont)

### K. Closing a Cash Drawer

Once all transactions for the currently open cash drawer have been processed, you may wish to close the drawer to finalize reporting for a shift. You must close all cash drawers at least once - at the end of the day just before closing the day.

To close a Cash Drawer, first touch the Cash Out control button on the Main Menu, then touch the Manager button to access the Cash Drawer. Touch Close Register. Answer Yes to the "Are You Sure" message, and a Closing Register Receipt will be printed on the first local printer found on your system. If no local printer is found, then the receipt will print on the first system printer found. See section 3.20 A for more information on setting up local and system printers.

The closing register receipt details the following information:

- 1) Report Title & Drawer Number
- 2) Terminal Number
- 3) Date & Time Drawer was closed
- 4) List of all Users Signed on to the Drawer
- 5) Starting Cash Amount
- 6) Cash In (Receipts)
- 7) Checks In (Receipts)
- 8) Each Credit Card / Alternate Tender Amount
- 9) Cash Pull Amount
- 10) Pay Out Amount
- 11) Reimbursement Amount
- 12) Total
- 13) Sub Total Cash Only

All totals are saved, and can be viewed on the Closing Register Summary Report [Section 2.35 B]. All transactions are also saved, and can be viewed on the Transaction Detail Report [2.35 A].

## 1.50 Table Management

DiamondTouch includes a very flexible integrated Table Management module for your Dine In operation. In fact, many users find that they can use the Table Management “Floor Plan” style user interface as the main screen from which to run their operation. Table Management provides 2 primary functions:

- Ticket Access (New & Recall) via a Graphical Table Floor Plan Interface
- Table Status Management

Before launching into Table Management, a few words about how DiamondTouch manages Sections will assist you in understanding the Table Management interface.

### A. Table Sections

DiamondTouch allows for up to 26 different Sections of tables. For many operations with less than 40-50 or so tables, a single section can represent the entire floor plan. There are, however, some distinct advantages to “breaking up” an operation into sections :

- Isolating Servers access to only those Tables to which they are assigned;
- Allowing “Zoom In” capability for larger, or more complex floor plans;
- Setting up smaller sub-sections for individual servers during peak periods, and then “Zooming Out” to a larger scale when things slow down, allowing a single server to handle larger areas;

When a user signs on to the system with a Job Code of 1,3 or 5 [See Section 1.10 B], the user will be prompted to enter a “default” section, such as Section “B”. When the User touches Table Management, DiamondTouch will always display this default section of tables for that user. [Instructions on setting up Table Sections are discussed in greater detail in Section 3.35 A.]

To navigate through the various Sections, touch the top of the Table Management screen. This action will always take you to the first Section set up for “Zoom In” capability. To enter the various Sub Sections, simply touch the desired area of the floor plan, and if it has been linked to a Sub Section, then that section will be displayed, along with any active Table icons. Additional Sections may have been Set Up for Zoom Capability from a Sub Section, since there is no limit to the number of “levels” that can be set up. Actual navigation will depend upon the system configuration that has been designed and configured for your operation.

### B. Accessing Tickets with Table Icons

Before starting a new ticket from a table icon on the Table Management screen, first make sure that the “Table Status” check box in the upper right part of the Table Management screen is NOT checked. To start a new ticket, simply touch a table icon.

As soon as you touch a table Icon, DiamondTouch first looks for any existing tickets for that table. If none are found, DiamondTouch takes you directly to Order Entry to begin a new ticket. Note that the table number of the table you touched has been filled into the “Smart Check” table box for you.

If there are any tickets found for the table that you touched, DiamondTouch will display those tickets in a pop up box before opening the Order Entry screen. This is so that you can have the choice of adding to an existing order, or starting a new order. You may also simply wish to review the tickets for a given table without opening Order Entry at all. DiamondTouch gives you the choice. If more than one ticket exists, you can even browse through them using the left/right indicators provided. [See Section 1.25 B for more information on Ticket Recall by Table Number].

## 1.50 Table Management (cont)

### C. Accessing Table Status w/ Table Icons

To access Table Status from Table the Management, simply touch the Table Status check box in the upper right portion of the screen. When this box is checked, you are telling the Table Management screen that you wish to use the table icons for Table Status, not Ticket Access. After you have checked the Table Status checkbox, touch one of the active Table icons to bring up the Table Status pop up box for that table.

The Table Status Pop-Up Box display 6 possible Table “States”:

Name	Color Code	Description
Ready	Yellow	Table is cleared and set, but not yet seated;
Seated	Green	Guest have been seated at this table
Order In	Light Blue	Order has been taken and sent to the kitchen
Served	Dark Blue	The Order has been served to the table
Clearing	Red	The guests have left the table;
Reserved	Black	The table is Reserved, or “blacked out”

Each time you touch one of the states for the table, you change the current status, and thereby the color of the table number displayed on the table. By glancing at a particular section, your Hostess can get a quick idea of the estimated wait time for a new table. Because each state change is time stamped, you can also browse the various tables from a single workstation to get an idea of how long each patron has been seated, waiting for an order to be placed, etc.

### D. Ticket Reprint

Ticket Reprint is used for just that - to reprint a ticket from Table Management.

From your Table Management screen , uncheck the Table Status check box and touch a table with at least one open ticket associated with it. Once the ticket you wish to reprint is visible in the pop-up box, touch Print Ticket. The ticket will be re-printed at the first local printer found on your terminal. If no local printer is found, DiamondTouch will spool the ticket to the first system printer found. [For more information on setting up local and system printers, see section 3.20 A].

### E. Server Info

To gain access to Server Management from Table Management screen, simply touch Server Info at any time. Server Management provides a quick summary of all server totals, server detail reporting, and an express Server Cash Out Function. For more information on Server Management, refer to Section 1.70.

### F. Server Tickets

Server Tickets provides a short cut to a “pre-set” Ticket Status Screen automatically configured to display tickets as follows :

- All Service Types
- Only those tickets ordered by the current user;
- Only those tickets that are currently Open (or, not Cashed Out);

For more information on the Ticket Status Screen, please see section 1.60.

## 1.50 Table Management (cont)

### G. Cashing Out a Ticket

To Cash Out a Ticket from the Table Management Screen, first make sure that the Table Status check box in the upper right hand portion of the screen is unchecked. Next, touch a table that already has an open ticket associated with it. After selecting the ticket you wish to cash out from the pop-up box, touch "Cash Out". The Cash Out screen will be opened with the ticket you selected loaded into the screen.

Please see section 1.35 for additional information on Cashing Out tickets.

## 1.60 Ticket Status

The Ticket Status screen provides the user with the ability to browse through the current day's tickets, to View, Reprint, Recall or Cash Out a particular Ticket, and to print a report of the current day's tickets to a printer. The Ticket Status screen also enables each user to customize the display properties to sort only those tickets that match a certain Service Type (or Types) , Server Name, Driver Name, Sort Order, or ticket status relative to the dispatched and/or open VS cashed out status of the ticket.

For Delivery Operations, the Ticket Status Screen also displays the elapsed time since the order was placed, with color coded alarms to graphically indicate the dispatch status. This way, a Manager can quickly spot any orders that are slipping past the standard delivery times being quoted to your customers. Animated red and yellow beacon alarms can assist in letting everyone know where attention needs to be focused if orders start to slip during peak periods.

### A. User Display

The Ticket Status screen displays the following information, updated about every 15 seconds:

- **Tkt** Ticket Number
- **Time** The last time Items were added to the ticket
- **Ordered By** The Name of the Employee that took the order;
- **Total** The total current value of the ticket
- **Status** Open / Closed (Cashed Out) or VOID
- **Service Type** One of 8 Possible Types of Service (Dine In, Take Out, Delivery, etc)
- **Location** For Dine In, this will be the Section and Table Number. For Phone Orders, this will either be the customer's address or the last name of the customer, if no address was given.
- **Elapsed** The amount of time between the last time items were added to the ticket and the current system time.

## 1.60 Ticket Status (cont)

### A. User Display (cont)

- **Driver** For Service Types set to “Allow Dispatch” [ See Section 3.25 A ], this column will display the name of the Driver. If the ticket has not yet been dispatched, then the column will display either:

Dispatch Due	{ Green }
Dispatch Over Due	{ Yellow }
Dispatch Late !!!	{ Red }

If your Animated Controls function has been turned on [Section 3.10A] , then any Over Due or Late tickets will also be accompanied by an animated rotating beacon display.

- **Out** For Service Types set to “Allow Dispatch” [See Section 3.25 A], this Column will display the time that the driver left with the order.
- **In** For Service Types set to “Allow Dispatch” [See Section 3.25 A], this column will display the time that the driver returned.

To navigate through the lists of tickets, use the Up/Down arrow control buttons to move up or down the list of tickets one at a time. To move up or down one page (about 8 tickets) at a time, use the Page UP and Page DOWN control buttons, also located at the right of the screen

### B. Adjusting User Display Options w/ Screen Set Up

One of the more useful and powerful tools on the Ticket Status screen is the ability to set individual Display Options for each user at each terminal. This allows an Order Taker or a Manager to browse though only those tickets that satisfy a certain search criteria, like “Delivery Tickets yet to be dispatched that were ordered by Suzy”, or “Dine In and Buffet tickets that are still Open, sorted first to last”. These options can then be used to search for a single ticket, or to print a customized report.

To adjust the Display Options, touch the “Screen Set Up” control at the bottom of the Ticket Status Screen. [NOTE: You can only adjust the Display Options when you enter the Ticket Status Screen via the Main Menu “Ticket Status” control button. Entering Ticket Status via the Server Management or the Table Management areas will not allow the use of Screen Set Up, since the Tickets have already been pre-sorted to a fixed criteria. [See Section 1.50 F and 1.70 B for more information.]

Display Options provides the following search criteria options:

- Service Types ALL, Single, or Multiple Service Types
- Order Taker ALL, or Selected Order Taker
- Driver ALL, or Selected Driver
- Display First-Last Starts the top of display list with oldest ticket first;
- Display Open Only Cashed Out (CLOSED) Tickets will not be shown
- Tickets Not Yet Dispatched For those Service Types set for dispatch, will not show dispatched tickets.

Before touching Finished to save the options, note that the current user's name is also listed on the top right portion of the Display Options Set Up box. This is a reminder that these options will be saved under this user's name, for this terminal only. Each time this user signs on and goes to Ticket Status, DiamondTouch will search through the current day's tickets according to these search options. The search options can be changed at any time, of course.

If DiamondTouch cannot locate any tickets that meet the specified criteria, then the Ticket Status screen will appear blank.

### **C. Printing a Ticket Status Report**

To print the Ticket Status report, touch the Print control Button at the lower left portion of the Ticket Status Screen. All tickets found matching the selected sort criteria will be printed to that station's Windows default printer. The report was designed to be printed on an 80 column printer.

### **D. View & Reprint Tickets**

To view a ticket, select the ticket you wish to view by touching one of the white fields - the ticket fields will turn blue once the ticket has been selected. Next, touch View Ticket. A pop up box will appear displaying the basic details of the ticket you selected. Press Finished to return to the Ticket Status screen.

If you wish to reprint the ticket, touch the All Profiles button, select the ticket profile you want to reprint and touch Reprint on the pop-up box.

### **E. Recalling Tickets**

To recall a ticket, select the ticket you wish to recall by touching one of the white fields - the ticket fields will turn blue once the ticket has been selected. Next, touch Recall Ticket. If the ticket can be recalled, the Order Entry screen will appear with the ticket displayed in the Smart Check user interface. Cashed Out (or, CLOSED) tickets cannot be recalled.

Note that the ability to recall a ticket is protected by a dedicated security level. A user must carry a security level at least as high as the level set for recalling tickets to use this function. Please see section 3.40 B for more information on setting up security levels.

### **F. Cashing Out a Ticket**

To cash out a ticket from the Ticket Status screen, select the ticket you wish to recall by touching one of the white fields - the ticket fields will turn blue once the ticket has been selected. Next, touch Cash Out. If the ticket can be cashed out, the Cash Out screen will appear with the ticket that you selected displayed in the listing at the left of the screen. Tickets that have already been cashed out cannot be cashed out again.

Note that the ability to cash out a ticket is protected by a dedicated security level. A user must carry a security level at least as high as the level set for Cashing Out tickets to use this function. Please see section 3.40 B for more information on setting up security levels.

If a cash drawer has not been configured for a terminal, then the cash out control will be disabled on that terminal.

## 1.70 Server Management

Server Management provides a quick overview of all Order Takers currently processing tickets on the system. Listed for each Server are the server name, total dollars and total orders for each section.

In addition, Server Management provides server detail report, a convenient short cut to Ticket Status for a given server, and a method of cashing out multiple tickets at a time with the Server Cash Out function.

### A. Server Detail Reports

To view a Server Detail Report, touch Server Management, select a server by touching the Server Name and then touch Report.

The server detail report provides the following information:

- 1) Report Title
- 2) Server Name
- 3) Date and Time the Report was generated
- 4) Ticket Listing, including the Ticket Number, Section, Table Number, Total Value, Amount Paid and Tender Method for each ticket
- 5) Subtotal of all tickets
- 6) Subtotal for each Tender Method
- 7) Subtotal of all Non-Cash Tenders
- 8) Balance Cash Due - (Total Ticket Value less Non-Cash Tenders)
- 9) Total Number and Value of all Open Tickets
- 10) Sales Breakdown by Service Type, including Service Type Description, Quantity, Total Dollars, Total Covers (Guests) , average dollars per guest for each Service Type, and footed totals for all of the above

Server Detail reports can be printed by touching the Print control button located at the bottom of the detail report pop-up box. The Server Detail Report will print on the first local printer found on the current terminal; if no local printer is found then the report will be spooled to the first system printer found. For more information on setting up local and system printers, please see section 3.20 A. The server detail report was designed to print on a 40-column printer.

Current and historical Server Detail Reports can also be viewed from the Manager Reports section. See section 2.15 A for more information on Server Reporting.

### B. Status List

The Status List control on the Server Management screen provides a short cut to a “pre-set” Ticket Status Screen automatically configured to display tickets as follows :

- All Service Types
- Only those tickets ordered by the current user;
- Only those tickets that are currently open, that is are not Cashed Out;

For more information on the Ticket Status Screen, see section 1.60.

## 1.70 Server Management (cont)

### C. Server Cash Out

In addition to the standard Cash Out screen [See section 1.35] DiamondTouch also offers a Server Cash Out function. The primary benefit of the Server Cash Out screen is its ability to cash out multiple tickets in one operation, for cash or cash & check tenders only. The Server Cash Out screen also offers the ability to use alternate tender keys and perform a split tenders on single tickets, but it does not offer a split ticket capability - where multiple guests wish to split payment for a single ticket. For this functionality, the standard Cash Out function is still recommended.

To use Server Cash Out, touch the Server Management control on the Main Menu, then select a server by touching the Server Name. Next, touch Cash Out. DiamondTouch will load the Server Cash Out screen and will display all open tickets for the selected server in the display box in the upper left of the screen.

Before cashing out tickets, they must be selected. You may select tickets one at a time (touch the Ticket and then touch Add Ticket) or you may select all tickets at once (touch All Tickets). The total due amount will reflect the sum of all selected tickets. You may cancel the operation by touching the Exit button, as long as you have not begun a partial tender, in which case you will be prompted to complete the tender before exiting.

Tickets that are cashed out in a multiple Ticket Tender operation are logged with one of two possible tender descriptions:

MTTCshOnly - Multiple Ticket Tender for Cash Only; and  
MTTCsh&Chk - Multiple Ticket Tender with at least a partial Check Tender.

These descriptions will be attached to the ticket transactions when they are viewed in the various register reports, to differentiate them from standard cash transactions.

Once each transaction has completed, a receipt will be printed [if your station has been configured to print register receipts - see section 3.10 A]. The receipt will detail the following information:

- 1) Name of the Server, to whom the tickets are attached
- 2) Name of the Cashier - that is the current user that processed the payment transaction
- 3) Date & time of the transaction
- 4) "Server Cash Out" Receipt Header
- 5) A list of tickets cashed out, including the ticket number, Table No., and amount of each ticket
- 6) Subtotal of all tickets selected
- 7) Tender description and amount for each tender
- 8) Subtotal Paid amount, if more than one tender was made
- 9) Amount of change due
- 10) Ticket Total and Average Ticket Value for the transaction

There is no limit to the amount of tickets that can be processed in one transaction. This function is therefore very useful for operations that run "Server Banking" until the end of the night. Servers can balance their banks with the Server Detail Reports, then settle payments with management using the Server Cash Out function for a speedy close out process at the end of the night.

## 1.80 Phone Orders

DiamondTouch provides an extensive feature set for phone orders. Highlights include:

- Customer Database in an open 32-Bit Microsoft Access compatible format
- Instant customer look up by phone number, or by name
- Complete order history, including capability of repeating any order with a single touch
- Street database, with automatic street search function
- Delivery areas, with automatic delivery charges by area, minimum order amounts, etc
- Repeat customer “Points” feature
- Priority messages tagged to “problem” or special consideration customers
- Automatic coupons for new, “lazy” customers
- Optional multi-line caller ID, with animated phone indicators - you could have your customer’s order history on screen before you answer the phone!

By combining Caller ID with Repeat Any Order and a Default Service Type, a complete order for a repeat customer calling in could be processed by touching the screen 5 times:

- 1) Touch Line 1 on Caller ID Screen to access Customer Record
- 2) Answer phone, and ask the customer if they want to repeat the 2 Dinners & 1 Salad they had last time: if the answer is yes, touch Repeat this Order
- 3) Touch NEXT - Order Entry will appear with the new ticket already filled out
- 4) Touch Finished - Delivery or Pick Up will be selected automatically
- 5) Touch Finish to print the order to all stations, and remember to thank the customer!

The above order could conceivably have been handled within 10-15 seconds or less!

Behind the scenes, automatic street search was used to locate a delivery area, an associated delivery charge of \$2.50 was added to the ticket based on the customer’s distance from the store, the customer’s account was updated with 25 points towards a repeat customer award, a “Welcome Back” Coupon was printed because the customer had not ordered within the last 45 days, and the driver was reminded to deliver to the side of the house and beware of a neighbor’s dog thanks to a priority message attached to the account.

By setting up a few parameters, and understanding how to use a few basic features, productivity gains like the one above can be just a few touches away.

### A. Manual Phone Number Entry

For standard phone entry, without Caller ID enabled, a user must ask the customer for a phone number and then enter the number into the system. To enter a phone number:

From the Main Menu touch Phone Order  
Enter the number on the keypad, and press enter;

DiamondTouch will search the Customer database for a match, and will then display the customer record on the Customer Information Screen. If no customer was found, the Customer Information screen will read “New Customer”.

For additional information on the Customer Information screen, see section 1.85.

## 1.80 Phone Orders (cont)

### B. Automated Phone Number Entry using Caller ID

For systems configured with Caller ID, touching the Phone Order control on the Main Menu will bring up the Caller ID User Interface screen. To answer one of the eight (8) incoming lines, simply touch the “Ringing” phone control associated with the line you wish to answer. The caller ID Phone number displayed on your screen next to the “Ringing” Phone Control will be user to automatically search the Customer Database, loading the Customer Information Screen with the matching record.

If no customer was found, the Customer Information screen will read “New Customer”, and the name returned by the Caller ID system will automatically be loaded into the Last Name field of the Customer Information Screen.

If you wish to bypass the Caller ID information, you can enter a phone number in at any time by pressing the Next control button on the Caller ID User Interface Screen.

Pressing Cancel at any time returns you to the Main Menu.

## 1.85 Customer Information Screen

The Customer Information screen is the main data entry screen used for Customer Information. While this screen is generally used for phone orders, the Customer Information screen could also be used for any customer that can be identified by a number - customers could even use frequent customer cards to identify themselves.

From the Customer Information screen, you can search for customers by last name, search for customers by phone number, perform an automatic or manual street search, browse through order histories, view and edit customer points, directions, special comments, and many other useful information - even your customer’s Birthdays!

To access the Customer Information screen, touch phone order and enter a phone number, or touch the Customer Button under the Advanced button on the Order Entry screen. When the Customer Information screen loads, it attempts to match the number you entered with an existing customer record. If none is found, it displays a nearly blank form titled “New Customer”.

### A. Primary Data Entry Fields

The primary data entry fields on the Customer information screen are as are as follows:

- 1) Phone Customer Phone Number, up to 10 Digits long
- 2) Last Name This field will also be used to recall tickets by name
- 3) First Name Primary Customer’s first name
- 4) 2nd Name Spouse / etc
- 5) Address Address Line 1
- 6) Address 2 Address Line 2; this field will be appended to line 1 on the tickets, up to 20 characters total;
- 7) Zip This field is used to look up City & State, which are read only fields in your Zip Code Database [See Section 3.50 C for more information about Zip Code Tables]
- 8) Map Grids These fields can be used for Map Book Coordinates
- 9) CR Carrier Route - Used for mailing lists, etc.

## 1.85 Customer Information Screen (cont)

### B. Delivery Information

Delivery Information is determined by the Street Address of your customer. If the street for your customer is found in the street database, and the street number falls within the specified range of that street record, then the delivery area associated with that street record will be attached to your customer and displayed just to the right of the Phone field. If not, then all customers are considered to be in Delivery Area 1 as a default. The 3 lines will contain the following information:

- 1) Area Description - Such as "Standard Area" or "Foot Hills".
- 2) Minimum Order Amount - Highlighted in red if greater than 0.00.
- 3) Delivery Charge - Highlighted in red if greater than 0.00.

For more information on Delivery Areas, see section 3.50 E.

### C. Customer Information Windows

There are 3 different pop-up information windows (and 2 search result windows that are discussed below) that provide additional information and functionality to the Customer Information Screen. These windows will appear, one at a time, in the right hand portion of the Customer Information Display.

Any 1 of the 3 information windows can be set to appear automatically each time the Customer Information Screen is accessed by making that window the "Default Customer Window". For example, you may wish to see the Previous Orders window for every customer as soon as the screen is opened. [See Section 3.10 A for more information on setting up a Default Customer Window.]

You can view any of the three information windows at any time by touching the associated control located on the lower control bar of the Customer Information Screen. The 3 information windows are discussed in more detail as follows.

#### 1) Customer Totals

The Customer Totals Window displays the following information:

- **Current Points** - This is an editable field that can be used for automatic accumulation and manual redemption of customer points for frequent diner awards programs, etc. Points can be earned based on a preset dollar / points scale that can be adjusted by the user. [See Section 3.50 D for more information about setting up Customer Point levels.] The value in this field will increment automatically each time a ticket is saved. To redeem point's levels, recall this customer record and manually enter the new points total in this field.
- **Total Points** - This is a read only field that will record the total points earned for this customer record. This is a non-resettable field from the Customer Information Screen.
- **Last Order** - This is the date of the last order for this customer
- **Total Dollars** - Total Dollars purchased by this customer.
- **Total Orders** - Total Number of Orders (Tickets) for this customer.
- **Birthday** - This is a miscellaneous field that can be used to store a customer's Birthday, for special marketing mailings, etc.

## 1.85 Customer Information Screen (cont)

### C. Customer Information Windows (cont)

#### 2) More Info

The More Info Window displays the following information:

- **Comments** - This is basically a memo/scratch pad for noting any special issue or concerns related to this customer. These comments will not appear on the customer's ticket, so this might be an excellent place to note the bad check you once received from this patron!

If you want to insure that your people always see your comment, you can check the **Priority Comments** checkbox in the upper right corner of this window. This way, the More Info Window will always appear first whenever this customer calls in, over-riding any "Default Customer Window" settings for your terminal. For example, let's say that you've set up your system to always display the Previous Orders Information Window for every customer. When your "problem" customer calls in, however, your order taker immediately sees an unfamiliar window - noting that this guy should be a cash only delivery - or, is possibly not someone you want to deliver to at all. By checking Priority Comments, you no longer have to require that your order takers check each and every Phone Order customer against a Bad Check list.

- **Customer Status** – You may activate a customer's Account Receivable option and eight other important notations of your choice by simply touching the Set Up button at the bottom of the main screen. Next, touch Customers and then Customers again from the pop up boxes that appear on the right of the screen. Finally, touch the Status button at the bottom of the Customer Database screen.
- **Directions** - For tickets set up to print Directions, the information in this window can be transferred to the tickets automatically. Messages such as "Beware of Neighbor's Dog" can keep the same mistake from happening twice!

#### 3) Previous Orders

Previous Orders is the most powerful of the 3 windows, and is generally the window that most operations will set up as the "Customer Default Window". All orders ever processed for this customer are available via this intuitive display window. You can browse backwards and forwards through the Customer's Order History using the left & right browser buttons beneath the ticket header. Note that orders will not appear in this window until the day's business has been closed; current orders will not be displayed here - they are available by recalling a ticket by Phone Number [See Section 1.25 D].

You can repeat any previous order by checking the Repeat Previous Order button before touching the NEXT button on the Customer Information Screen. The ticket currently in view will be the ticket that is selected for duplication. When Order Entry loads, you will find an identical order already keyed into the Order Entry Screen along with any updated pricing, of course.

### D. Looking Up a Customer By Phone Number

To access a different customer by phone number, enter the new phone number in the "Phone" text box at the top of the Customer Information Screen, then press the Enter key. If the customer record is found, the new customer data will be displayed on the Customer Information Form. If the record was not found, the Customer Information Screen will read "New Customer".

## **1.85 Customer Information Screen (cont)**

### **E. Looking Up a Customer by Name**

To look up a customer by Last Name, type the new Last Name in the “Last Name” text box and press then Enter key. A list of matching names will be displayed in an information box to the right of the screen. To access the full record of one of the matching names, select the name by touching it and then touch the small “Next” control in the Names Information Window. To close the information window at any time, press cancel.

### **F. Looking Up a Street Address**

Matching customer street addresses to the Street Database is useful for assigning delivery areas, to which you can assign different minimum orders and delivery charges, and for automatically retrieving City, State and Map Grid information into your customer record. This can reduce data entry time for new customers, since you would only need to request a name and an address to fill in your Customer Information screen. For information on filling out your Street Database, please see section 3.50 B.

If Automatic Street Search is turned on, the Customer Information screen will automatically try to find a matching street for your customer record as soon as the screen is initialized. You can also activate street search at any time by entering an address [example: 123 First Street] into the Address text box on the Customer Information Screen, and by then pressing your Enter key.

If the street is not found, a Street Information Window will open automatically on the right side of your screen. Street Search will attempt to match your street with the closing matching entries at the top of the list. To select one of the displayed streets, touch the street and then touch the small Next control within the street search information box. Before replacing your street name, Street Search will evaluate the street address to make sure that it falls within the range of the street selected. If the address matches, the street search box will disappear. If the address does not fall within defined range of your selection, then the Street Search box will re-appear with a red “Street Number is Out of Range” message. You can edit the street number in the address field and then press enter to allow Street Search one more chance to match the record, or accept the entry “as is” by touching the Cancel button on the Street Search Window.

## 1.90 Delivery Management

For operations that provide delivery service to their customers, DiamondTouch provides a comprehensive integrated Delivery Management System. From the Delivery Management screen, you can view the status of drivers, both IN and OUT, add drivers to the IN list, dispatch drivers, add tickets to drivers, remove tickets from drivers, cash out drivers, close driver accounts and view summary and detail driver reports for the current period.

### A. Delivery Status Screen

The main delivery status screen is divided into 3 sections:

- 1) Drivers IN the store
- 2) Tickets scheduled for delivery
- 3) Drivers OUT of the store delivering orders

When a driver is added to the list by using the Add Driver control (see below) the driver is automatically added to the end of the Drivers IN list. When a driver is dispatched using the Driver Dispatch control (see below) the driver is moved to the Drivers OUT side, to signify that he is OUT.

When a driver returns to the store, using the Driver IN control (see below) he is once again placed at the end of the Drivers IN list. Drivers keep moving from the Drivers IN section to the Drivers OUT section throughout the day as they delivery orders and return, until they are "Closed".

The following information is displayed for each Driver IN:

- 1) **Name**- The Employee Name of the Driver
- 2) **Driver \$** - IN Driver \$ is the sum of :
  - Outstanding amount of the Starting Bank
  - + Full Value of all tickets not yet cashed out
  - + Reimbursed amounts collected from tickets previously cashed out
- 3) **Total \$** - IN Total \$ is the sum of:
  - Amount of the Starting Bank
  - + Full Value of all tickets issued to the driver, both cashed out and open
- 4) **Orders**- The total number of tickets dispatched to this driver
- 5) **Runs** - Each time a driver is dispatched is considered one "run". This field displays the total runs for this driver for the day.
- 6) **Avg Time** - Average Time is the total amount of time OUT for all runs divided by the total number of runs. For example, if a driver took 30 minutes for run # 1, and only 10 minutes for run #2, then the average time per run would be 20 minutes.

## 1.90 Delivery Management (cont)

### A. Delivery Status Screen (cont)

The following information is displayed for each Driver OUT:

- 1) **Name**- The Employee Name of the Driver
- 2) **Order #** - This field will list all of the ticket numbers for the current run only
- 3) **Order \$** - This is the dollar value of all tickets for the current run only
- 4) **Driver \$** - IN Driver \$ is the sum of :
  - Outstanding amount of the Starting Bank
  - + Full Value of all tickets not yet cashed out
  - + Reimbursed amounts collected from tickets previously cashed out
- 5) **Time Out** - This is the elapsed time for the current run.

The driver display screen is also set to update automatically every few seconds when drivers are dispatched or returned, even if they are using other terminals on the Network.

### B. Adding a Driver

To add a driver to the IN list, touch the Add Driver control on the lower part of the Driver Management screen. Driver Management will prompt you to swipe the Driver's ID Card on the optional Wedge reader, or you may enter the Driver's employee password with the keyboard. Please note that the Driver must be clocked in before you can add him to the list. [See section 1.15 B for more information on clocking in an employee].

Once the password has been recognized, you will be prompted to enter a starting bank for the driver. Note that the starting bank will be added to the driver bank, and will be deducted from the cash drawer to which the current user is signed on. Therefore, if the amount of the driver's starting bank is greater than 0.00, you will need to have an active cash drawer on the system from which to deduct the starting bank. If the drawer is not yet open, or the current user has not yet signed onto a cash drawer, then you will be prompted to perform those functions before you can assign a starting bank to a driver. Please see section 1.40 for more information on signing on to and opening a Cash Drawer. If you do not wish to assign a starting bank to a driver, simply enter zero (0.00).

If the current user does not have a password level sufficient to add drivers or to open a cash drawer, the system will give you the opportunity to perform a "Manager Over-Ride" of these functions. A Manager Over-Ride will allow a manager to swipe an ID card or enter a password to perform a single function, without changing the identity of the current user.

Once the driver is added, note that the driver's name has been added to the top ½ of the display, indicating that this driver is in and is waiting to be dispatched. The amount of the starting bank will be included in the Driver \$ and Total \$ fields.

## 1.90 Delivery Management (cont)

### C. Dispatching a Driver

To dispatch a driver, first highlight one of the IN Drivers listed by touching the driver's name. Next, touch the ticket you want the selected driver to deliver and then touch the Driver Out button at the bottom of the screen.

Tickets listed will be those that were saved with a Service Typeset to "Allow Dispatch", such as a Delivery Service Type. See section 3.25 - A for more information on setting up Service Types for Dispatch.

The list of tickets shown includes the following information:

- **Elapsed** This is the amount of time that has passed since the ordered was placed. Note that the color of this field will be Green, Yellow or Red. The color shown is based on minutes elapsed, and the thresholds are settable by using the Colors control located at the bottom left of the Open Delivery Orders screen.
- **Address** This is the Delivery Address for the ticket. This information was displayed in the Customer Information Display in the fields labeled Address and Address 2 when the ticket was saved. See section 1.85 for more information on the Customer Information screen.
- **Tkt #** Ticket number
- **Grid** This is the Map grid coordinate for the customer to which the ticket is to be delivered. This information was displayed in the Customer Information Display in the fields labeled Map Grids. See section 1.85 for more information on the Customer Information screen.
- **Ordered** The time that the ticket was ordered, or was last updated.

In addition, the list of open tickets also includes a display of the current time, located in the upper right hand corner of the screen. If more than 10 tickets are listed, MORE! Buttons located to the right of the tickets allow browsing through the additional tickets. Tickets are listed with the oldest ticket numbers first, so that the most urgent delivery orders should be the first ones you will see.

To issue tickets to the driver that you are dispatching, simply touch the ticket address fields. If you wish to de-select the ticket, simply touch it a 2<sup>nd</sup> time. Selected tickets will be highlighted in yellow, de-selected tickets will remain white. You may select and de-select as many tickets as you wish.

Note that the driver has now been moved to the Drivers OUT section of the Delivery Status display, and the tickets you selected will appear under the Order # fields for that driver.

## **1.90 Delivery Management (cont)**

### **D. Removing a Ticket from a Driver**

On some occasions, you may find it necessary to remove a ticket from a driver after the driver has been dispatched. This could be because a driver has inadvertently selected the wrong ticket, or because you decide to assign the ticket to another driver.

To remove a ticket from a driver, first touch Driver, then touch Driver Info. Next, select Ticket Entry and then touch the Remove Ticket button located at the bottom of the Delivery Management display.

Because this feature could represent an opportunity for abuse from an audit control stand point, a dedicated security level protects this feature. [See section 3.40 B for more information on setting up Security Levels.]. In addition, this event is logged as an exception event, similar to a voided ticket, and will be highlighted on the Event Log Report for the current reporting period. [See section 2.25 B for more information on Ticket Event Log reporting].

### **E. Returning a Driver**

When a driver returns to the store following a delivery run, the driver can be returned to the IN list by simply touching the driver name, and then touching the "Driver In" control on the bottom right side of the Delivery Management Screen

The driver information will move from the OUT list of the screen to the IN list of the screen.

### **F. Cashing Out a Driver**

Once a driver returns, it will be necessary at some point to account for the money collected by the driver for each ticket. It is not necessary to cash out a driver after each run, but it is necessary to cash out a driver before the driver account can be closed. The driver account must be closed for all drivers before you can close the day, so this means that driver cash out is a mandatory procedure.

To access the Driver Cash Out Screen, highlight one of the drivers in the IN list and touch the Driver Info button at the bottom of the display. Touch the Cash Out button and DiamondTouch will load the Driver Cash Out screen and will display all open tickets for the selected driver in the display box in the upper left of the screen.

The user will be prompted to enter the Reimbursement Amount for each ticket. The reimbursement amount will be issued to the driver as a cash disbursement from the currently open cash drawer. The total amount due for each ticket will reflect the NET total due from the driver (the ticket amount less the amount of reimbursement specified by the user). You may wish to enter 0.00 as a reimbursement amount if you do not reimburse your drivers on a flat fee per ticket basis.

Before cashing out tickets, they must be selected. You may select tickets one at a time (touch the Ticket and then touch Add Ticket) or you may select all tickets at once (touch All Tickets). The total due amount will reflect the sum of all selected tickets. You may cancel the operation by touching the Exit button, as long as you have not begun a partial tender, in which case you will be prompted to complete the tender before exiting.

## 1.90 Delivery Management (cont)

### G. Cashing Out a Driver (cont)

Tickets that are cashed out in a multiple Ticket Tender operation are logged with one of two possible tender descriptions

- MTTCshOnly - Multiple Ticket Tender for Cash Only
- MTTCsh&Chk - Multiple Ticket Tender with at least a partial Check Tender.

These descriptions will be attached to the ticket transactions when they are viewed in the various register reports, to differentiate them from standard cash transactions.

Once each transaction has completed, a receipt will be printed [if your station has been configured to print register receipts - see section 3.10 A] which details the following information:

- Name of the Driver, to whom the tickets are attached
- Name of the Cashier - that is, the user that processed the payment transaction
- Date & Time of the transaction
- "Driver Cash Out" Receipt Header
- An itemized listing of all tickets cashed out, including the ticket number, delivery address, and amount of each ticket
- Subtotal of all tickets selected
- Amount of Returned Bank, if any
- Amount of Reimbursements, if any
- Balance Due Subtotal
- Tender description and amount for each tender
- Subtotal Paid amount, if more than one tender was made
- Amount of change due, if any
- Ticket Total and Average Ticket Value for this transaction

There is no limit to the amount of tickets that can be processed in one transaction. This function is therefore very useful for operations that run "Driver Banking" until the end of the night. Drivers can balance their banks with the Driver Detail Reports, then settle payments with management using the Driver Cash Out function for a speedy close out process at the end of the night.

Before a driver's account can be closed, you must return any outstanding driver banks to the system. The driver bank can be returned using the Driver Cash Out Screen. Touch the "Bank To Cashier" control on the Driver Cash Out screen, and the amount of any outstanding bank will appear in the amount due window. Press a tender key, such as cash, and the bank will be returned. Once the bank is returned, the display will read "Cashed Out". The driver bank must be returned as a separate transaction, for accuracy in accounting for and reporting tender methods and amounts to tickets.

## **1.90 Delivery Management (cont)**

### **G. Closing Out a Driver**

Once all of the driver's tickets have been cashed out, and any outstanding Driver Banks have been returned, you are ready to close the driver's account. From the delivery management screen, touch the driver name from the list of drivers currently shown as IN. Select the Driver Info button at the bottom of the page and then select Close Out on the Driver Detail pop up box. The driver's account will be closed automatically. A driver Check Out ticket will print detailing the following information:

- 1) Driver Name
- 2) Date and Time that the driver account was closed
- 3) Amount of Bank Returned (labeled "Added Cash")
- 4) Total of all tickets
- 5) Total Number of Tickets
- 6) Total Number of Runs
- 7) Average time per run

### **H. Driver Summary Report**

The Delivery Management screen also provides options for displaying and printing reports for the current period. These reports are also available under Reports [See section 2.40]. To access the reports, touch the Reports control on the lower left of the Delivery Management Screen.

The Driver Summary Report details the following information:

- 1) Date & Time of Report
- 2) Name of Report
- 3) Driver Name, for each driver
- 4) Driver Status (Open / Closed) for each driver
- 5) Total # Runs for each Driver
- 6) Total # Tickets for each driver
- 7) Total \$ for each driver

To print the Driver Detail Report, touch Print. The report will print to the first local printer found on your terminal. If no local printer is found, the report will be spooled to the first system printer found. For more information on setting up local and system printers, see section 3.20 A. Note: This report is designed to print on a 40-column printer.

## **1.90 Delivery Management (cont)**

### **I. Driver Detail Reports**

To access a Driver Detail Report, first access the Driver Summary Reports detailed in the previous section. Select a driver by touching the driver's name, and then touch the Driver Info control on the lower command bar. A pop up window will then display the Driver Detail Report.

The Driver Detail Report contains the following information:

- 1) Date & Time of Report
- 2) Name of Report
- 3) Driver Name
- 4) A Ticket Detail Report, including the Run Number, Ticket Number, Delivery Address and Dollar Amount for each ticket.
- 5) Total Ticket Dollars
- 6) Outstanding Bank
- 7) Total Driver Amount
- 8) A Run Detail Report, including the Run #, Time Out, Time In, Total Time, Total Tickets, Average time Per Ticket and Total Ticket Amount for each Run
- 9) Footed Totals for the Run Detail Report.

## PART 2 Manager Features

### 2.10 Sales Reporting

#### A. Daily Sales Reports

To view the Daily Sales Reports, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Sales, then select Daily Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired report date from the Report Date Selection Window in the Lower Right quadrant of the screen, and press Next.

The Daily Sales Report is actually 5 summary reports compiled into a single Daily Sales Summary. Each of these summary reports is discussed below. The five Summary reports are:

- 1) Net Sales Summary by Service Type
- 2) Gross Sales Summary by Hour
- 3) Net Sales Summary By Category
- 4) Net Sales Summary by Patron Count
- 5) Discount Summary by Discount Type

#### 1) Net Sales Summary by Service Type

The Net Sales Summary by Service Type Report can give you a quick snapshot of your business day.

In addition to totals for tickets and sales, the breakdowns and %'s by service type can let you know how each "profit center" within your business is doing at a glance. Keeping an eye on average ticket values can also let you know if anything unusual is taking place.

Service Type	Qty	Amount	Percent%	Average
Dine In	9	257.02	47.44%	28.56
Delivery	7	221.37	40.86%	31.62
Pick-up	1	48.45	8.94%	48.45
Waiting	1	14.90	2.75%	14.90
SubT Sales	18	541.74	100.00%	30.10
Adjustments	0	0.00	0.00%	
Net Sales		541.74		
Sales Tax		32.51		

Detailed on this report you will find:

- a) Ticket Quantity for each Service Type
- b) Ticket Dollars for each Service Type
- c) Percentage of Total Dollars for each Service Type
- d) Average Ticket Value for Each Service Type
- e) Footed Sub-Totals for Ticket Quantity, Dollars, Percentage and Average Ticket Value
- f) Price Adjustment Quantity, Dollar Value and Percentage of Sales
- g) Sales Tax
- h) Gross Sales Total

## 2.10 Sales Reporting (cont)

### A. Daily Sales Reports (cont)

#### 2) Gross Sales Summary by Hour

The Gross Sales Summary by Hour Report gives you a fast overview of your sales distribution throughout the business day.

Detailed on this report you will find:

- a) Total Ticket Quantity for each Hour
- b) Total Ticket Dollar Value for each Hour
- c) A Self Scaling "Side Bar Text Graph" Displaying Dollar value by hour
- d) Footed Totals

For this report, total ticket values are logged into the hour during which they were last changed.

#### 3) Net Sales Summary By Category

The Net Sales Summary by Category Report breaks down the Sales by your Menu Categories. This allows you to tell at a glance how much each of the Menu Categories is contributing to your total sales.

Detailed on this report you will find:

- a) Category Name for each Category
- b) Quantity of Items Ordered in each Category
- c) Total Sales from Each Category
- d) Percent of Sales Contribution from each Category
- e) Footed sub-totals for sales and percentage of Total Sales
- f) Total Quantity, Dollars, and Percentage of Sales for Discounts
- g) Total Quantity and Dollars for Delivery Charges
- h) Net Sales Total

Note that your Net Sales total in item h) above should always tie back to your Net Sales total listed under the Net Sales Summary by Service Type report.

#### 4) Net Sales Summary By Patron Count

The Net Sales Summary by Category Report breaks down the total sales yet another way - by Patron Count for each of your Service Types.

The net sales summary by Patron Count includes the following information:

- a) Ticket Quantity for each Service Type
- b) Ticket Dollars for each Service Type
- c) Patron Quantity for each Service Type
- d) Average Dollars per Patron for each Service Type
- e) Footed totals, including Average Dollars Per Patron Type for All Service Types Combined

## 2.10 Sales Reporting (cont)

### A. Daily Sales Reports (cont)

#### 5) Discount Summary By Discount Type

The Discount Summary by Discount Type report summarizes all discounts and price adjustments for all tickets processed during the day. [See section 1.20 E for more information on discounts and Price Adjustments].

The Discount Summary by Discount Type report includes the following information:

- a) Quantity for each Discount Type
- b) Dollars for each Discount Type
- c) Percentage of Net Sales for each Discount Type
- d) Footed Discount Subtotals for Quantity, Dollars and Percentage of Net Sales
- e) Quantity for each Price Adjustment Type
- f) Dollars for each Price Adjustment Type
- g) Percentage of Net Sales for each Price Adjustment Type
- d) Footed Price Adjustment Subtotals for Quantity, Dollars and Percentage of Net Sales

To print all 5 of the reports bundled into the Daily Sales Report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to be printed on an 80 column printer.

### B. Daily Item Report

To view the Daily Item Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Sales, then select Daily Item from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired report date from the Report Date Selection Window in the Lower Right quadrant of the screen, and press Next.

The Daily Item Report provides an even more detailed view of the daily sales make up by menu selection than does the Net Sales Summary by Category. The Daily Item Report includes the following information, sorted by Menu Category and Menu Item number:

- a) Quantity for each Menu Item
- b) Dollars for each Menu Item (includes value of ordered menu modifiers)
- c) Percentage of Net Sales for Each Menu Item
- d) Average Sales Value of each Menu Item
- e) Footed totals for each category, including the Quantity Sold, Dollars, Percentage of Net Sales and Average Value.

To make the report more readable, and to save paper, the Daily Item report will only print information for defined menu items that were sold during the reporting period.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.10 Sales Reporting (cont)

### C. Daily Modifier Report

To view the Daily Modifier Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu , touch Sales, then select Daily Modifier from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired report date from the Report Date Selection Window in the Lower Right quadrant of the screen, and press Next.

The Daily Item Report (see above) includes the cost of any Menu Modifiers ordered with the items in the report totals. For example, if a Pizza has been ordered with extra cheese and onions, then the price for those modifiers is included in the total Pizza pricing listed in the Daily Item Report. To get a separate look at how many toppings were ordered, the Daily Modifier report provides the required level of detail.

The Daily Modifier Report includes the following information, sorted by Modifier List and Menu Modifier number:

- a) Quantity for each Menu Modifier
- b) Dollars for each Menu Modifier
- c) Percentage of Net Sales for Each Menu Modifier
- d) Average Sales Value of each Menu Modifier
- e) Footed totals for each Modifier List, including the Quantity Sold, Dollars, and Percentage of Net Sales and Average Value.

To make the report more readable, and to save paper, the Daily Modifier report will only print information for defined menu modifiers that were sold during the reporting period.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### D. Period Sales Reports

The Period Sales Report is identical to that of the Daily Sales Report with one exception - the reporting period is not limited to a single reporting day, but is user definable for any range of dates.

To save a step when calling up reports, Reporting Periods are defined in advance using the Reporting Period tool found under Custom Reports. This way, once the user has defined a week, month, or other reporting period once, it does not have to be repeated each time a report is pulled. [See section 2.50 A for more information on defining reporting periods.]

To view the Period Sales Reports, touch the Reports control on the Main Menu screen. From the Manager Reports main menu , touch Sales, then select Period Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next. DiamondTouch will display a progress bar while the report is built.

For more information on data detailed in the Period Sales Report, please refer to the Daily Sales Report descriptions in Section 2.10 A.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## **2.10 Sales Reporting (cont)**

### **E. Period Item Reports**

The Period Item Report is identical to that of the Daily Item Report with one exception - the reporting period is not limited to a single reporting day, but is user definable for any range of dates.

To save a step when calling up reports, Reporting Periods are defined in advance using the Reporting Period tool found under Custom Reports. This way, once the user has defined a week, month, or other reporting period once, it does not have to be repeated each time a report is pulled. [See section 2.50 A for more information on defining reporting periods.]

To view the Period Item Reports, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Sales, then select Period Item from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next. DiamondTouch will display a progress bar while the report is built.

For more information on data detailed in the Period Item Report, please refer to the Daily Item Report descriptions in Section 2.10 B.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### **F. Period Modifier Reports**

The Period Modifier Report is identical to that of the Daily Modifier Report with one exception - the reporting period is not limited to a single reporting day, but is user definable for any range of dates.

To save a step when calling up reports, Reporting Periods are defined in advance using the Reporting Period tool found under Custom Reports. This way, once the user has defined a week, month, or other reporting period once, it does not have to be repeated each time a report is pulled. [See section 2.50 A for more information on defining reporting periods.]

To view the Period Modifier Reports, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Sales, then select Period Modifier from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next. DiamondTouch will display a progress bar while the report is built.

For more information on data detailed in the Period Modifier Report, please refer to the Daily Modifier Report descriptions in Section 2.10 C.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## G. Period Summary Reports

The Period Summary Report is a weekly summary sales breakdown. The report provides the following data totals for each day of the week selected with a weekly total:

- 1) Access Date and Time
- 2) Week day
- 3) Ticket
- 4) Guest
- 5) Net Sales
- 6) Price Adjustments
- 7) Tax
- 8) Totals

To view the Period Summary Reports, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Sales, then select Period Summary from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next. DiamondTouch will display a progress bar while the report is built.

## 2.15 Server Reporting

Server Reporting provides a store manager with a wealth of information for analyzing sales information by individual Server. Server sales by Section, Guest Counts, breakdowns by Service Type and Menu Category, and “Drill Down” detail reporting are described in greater detail below.

**Server Summary Report for Current Period**

Server	Section	Tkts	Patron
Mike Smith	A	1	
Mike Smith	C	18	
<b>Totals</b>		<b>19</b>	

Server	Dine In	Deliver	Pick-Up
Mike Smith	10.07		
Mike Smith	262.38	234.65	51.36
<b>Totals</b>	<b>272.45</b>	<b>234.65</b>	<b>51.36</b>

**Server Detail**

Server Report S. Hernandez  
 Accessed on 08-13-2001 at 11:47:54  
 Report for , Section A

Tkt#	Table	\$Ticket	\$Paid	Tender
1	A-000	14.30	13.60	MttCashOn *
56	A-000	14.04	13.34	MttCashOn *
142	A-000	13.59	12.89	MttCashOn *
213	A-000	12.98	12.28	MttCashOn *
<b>Total Due</b>		<b>54.91</b>		
<b>SubTotal Non Cash</b>		<b>0.00</b>		
<b>Balance Cash Due</b>			<b>54.91</b>	
<b>Cash by others</b>		<b>- 0.00</b>		*
<b>Subtotal Cash Due</b>			<b>54.91</b>	
<b>0 Open Ticket :</b>		<b>0.00</b>		*****

### A. Server Summary Report

To view the Server Summary Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Servers, then select Server Summary from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting day from the Selection Window in the Lower Right quadrant of the screen, and press Next.

The Server Summary report actually includes 2 separate reports:

## 2.15 Server Reporting

### A. Server Summary Report (cont)

1) **Server Summary Report** includes the following information:

- a) Server Name, for each server section
- b) Server Section, for each server section
- c) Total Tickets, for each server section
- d) Total Patrons, or Guests, for each server section
- e) Total Dollars for each Server Section
- f) Footed totals for tickets, patrons and dollars for all server sections combined;

2) **Server Sales by Service Type Report** includes the following information:

- a) Server Name, for each server section
- b) Total Server Sales for each Service Type
- c) Footed totals for each Service Type

### B. Server Detail Report

The Server Detail report is a “Drill Down” report option viewable only from the Server Summary Report Screen. To view the Server Detail Report, select a server by touching the one of the Server Names on the Server Summary Report. [To access the Server Summary Report, see section 2.15 A, above].

Once you have selected a server, touch Server Detail and Sales Category buttons that appears on the control bar at the bottom of the Server summary report screen. A pop up box will detail the server activity for the reporting period.

The server detail report provides the following information:

- a) Report Title
- b) Server Name
- c) Date and Time the Report was generated
- d) Ticket Listing, including the Ticket Number, Section, Table Number, Total Value, Amount Paid and Tender Method for each ticket
- e) Subtotal of all tickets
- f) Subtotal for each Tender Method
- g) Subtotal of all Non-Cash Tenders
- h) Balance Cash Due - (Total Ticket Value less Non-Cash Tenders)
- i) Total Number and Value of all Open Tickets
- j) Sales Breakdown by Service Type, including Service Type Description, Quantity, Total Dollars, Total Covers (Guests), average dollars per guest for each Service Type, and footed totals for all of the above

Server Detail reports can be printed by touching the Print control button located at the bottom of the detail report pop up box. The Server Detail Report will print on the first local printer found on the current terminal; if no local printer is found then the report will be spooled to the first system printer found. For more information on setting up local and system printers, please see section 3.20 A. The server detail report was designed to print on a 40-column printer.

## 2.15 Server Reporting (cont)

### C. Server Sales By Category Reports

The Server Sales by Category Report is a “Drill Down” report option viewable only from the Server Summary Report Screen. To view the Server Sales by Category Report, select a server by touching the one of the Server Names on the Server Summary Report. [To access the Server Summary Report, see section 2.15 A, above].

Once you have selected a server, touch the Server Sales by Category control that appears on the control bar at the bottom of the Server summary report screen. A pop-up box will detail the server sales by category activity for the reporting period.

The Server Sales by Category Report provides the following information:

- a) Report Title
- b) Server Name
- c) Date and Time the Report was generated
- d) Reporting Period
- e) Category Name, for each category with sales data
- f) Quantity of items sold in each category with sales data
- g) Total amount sold in each category with sales data

Server Sales by Category Reports can be printed by touching the Print control button located at the bottom of the detail report pop up box. The Server Sales by Category Report will print on the first local printer found on the current terminal; if no local printer is found then the report will be spooled to the first system printer found. For more information on setting up local and system printers, please see section 3.20 A. The Server Sales by Category Report was designed to print on a 40-column printer.

### D. Server Tips

To view the Server Tips Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Servers, then select Server Tips from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired employee from the Selection Window in the Lower Right quadrant of the screen, and press Next.

The Server Tips Report provides the following information:

- 1) Report Title
- 2) Server Name
- 3) Pay Period
- 4) Credit Card Tips
- 5) Declared Cash Tips

## 2.15 Server Reporting (cont)

### E. Daily Items/Sales

To view the Server Daily Items/Sales Report, touch the Reports button on the main menu screen. From the Manager Reports main menu, touch Servers, then select Server Daily Items/Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired period from the Selection Window in the Lower Right quadrant of the screen, and press Next.

The Items by Server Report provides totals by employee for the various categories and items on your menu. To select a different category or item, simply scroll left or right using the Category or Item buttons at the bottom of the screen.

The Report provides the following information:

- 1) Report Title
- 2) Report Date and Time
- 3) Server
- 4) Quantity
- 5) Sales
- 6) Number of Tickets

### F. Period Item Sales

To view the Period Item Sales Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Servers, then select Period Item Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired weekly period from the Selection Window in the Lower Right quadrant of the screen, and press Next. Scroll through the category and/or items button in the Lower Right quadrant of the screen. Once the desired Category and Item have been selected, touch Next. The Processing Data bar will appear while the information is being compiled.

The Period Item Sales Report provides the following information:

- 1) Report Title
- 2) Report Week
- 3) Sales for Category and Item
- 4) Server
- 5) Quantity
- 6) Sales
- 7) Number of Tickets

## 2.20 Labor Reporting

### A. Daily Labor Reports

The Daily Labor Report provides a detail listing of every employee/shift worked for the selected date, and includes hours worked, labor dollars spent and sales generated.

To view the Daily Labor Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Labor, then select Daily Labor from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

The Daily Labor Report will be displayed for the current reporting date. If the report is being viewed for the first time, then the default date will be the current date.

To change the reporting date, touch Report Date, then use the Calendar Selection Screen to select a new reporting date. You may browse through the possible dates using the scroll bars next to the month and year indicators. To select a new date, simply touch the date on the calendar, and press OK.

The Daily Labor Report provides the following information for each employee that clocked in for the selected report date:

- 1) Employee Name, Social Security Number & Record Number
- 2) SC - Service Code 1-5 declared by the employee during clock IN.
- 3) IN Time
- 4) OUT Time
- 5) Time - Total time worked, in hours and minutes.  
RgHrs - Regular Hours. Hours are considered regular unless the employee has exceeded 40 hours for the 7 day reporting period.
- 6) OTHrs - Overtime Hours. Any time worked past 40 hours for each 7 day reporting period are counted as overtime hours.  
RgLabor - Regular Labor. Regular labor is calculated according to the following formula: Regular Hours X Employee Regular Pay Rate.  
The employee Regular Pay Rate is the amount entered on the Employee Set Up form for the indicated Service Code. See section 3.40 A for more information on setting up employee pay rates.  
OTLabor - Overtime Labor. Overtime Labor is calculated according to the following formula: Overtime Hours X Employee Overtime Rate  
The employee Overtime Pay Rate is the amount entered on the employee Set Up form for the indicated Service Code. If no amount is entered under employee Overtime Rate, then the Overtime Pay Rate is calculated to be the Regular Pay Rate for the indicated service code multiplied by 1.5. See section 3.40 A for more information on setting up employee pay rates.
- 7) Tips - Any tips declared by employee during Clock Out.
- 8) Sales - Line items on tickets that were ordered by this employee between the time the employee clocked in and when the employee clocked out.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.20 Labor Reporting (cont)

### B. Period Labor Reports

The Period Labor Report is identical to the Daily Labor Report described in the previous section, with the exception that the Period Labor Report includes a detail listing for every employee/shift worked for the entire Pay Period, not just a single day.

To view the Period Labor Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Labor, then select Period Labor from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

To change the reporting period, touch Pay Period, then use the Calendar Selection Screen to select a new reporting period. You may browse through the possible dates using the scroll bars next to the month and year indicators. To select a new reporting period, simply touch any date within the reporting period, and the reporting period for that date will be highlighted. Press OK to select the reporting period.

To print the report, touch the Print control at the lower left of the report display screen. The report will print to your Windows default printer. This report was designed to print on a 80-column printer.

DiamondTouch allows you to export your labor information in a format accessible by ADP. The ADP Export button at the bottom of the Period Labor Reports screen can be saved on disk or email directly to ADP for payroll processing.

### C. Productivity Reports

The Productivity Report provides a 3D Bar Graph displaying the average Sales Per Hour ratios for each sales hour in the selected reporting date, as well as a cumulative average sales per hour ratio for the selected reporting date. In addition to the 3D Bar Graph, the Productivity Report also displays a Sales Per Hour breakdown that includes the back up data used to compute the averages. The Productivity Report can be viewed for any employee, or for all employees combined.

To view the Productivity Report, touch the Reports button on the main menu screen. From the Manager Reports main menu, touch Labor, then select Productivity from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a specific Employee Name, or All Employees, from the selection window that appears in the lower right quadrant of the screen.

Like all other Labor Reports, the Productivity Report is based in part on employee time records. Sales are only graphed if employee time has been recorded for the selected report date, since the purpose of the report is to detail sales per actual hours worked.

To change the reporting date, touch Report Date, then use the Calendar Selection Screen to select a new reporting date. You may browse through the possible dates using the scroll bars next to the month and year indicators. To select a new date, simply touch the date on the calendar, and press OK.

## 2.20 Labor Reporting (cont)

### C. Productivity Reports (cont)

The Productivity Detail Report includes the following information:

- 1) Report Header, including Title of Report, Employee Name Selected, selected date of report and the reporting Pay Period.
- 2) Hour identifier, for each hour in which sales were entered
- 3) Total Hourly Sales Amount, for each sales hour
- 4) Total Hours worked, for each sales hour
- 5) Average Sales Per Hour Worked, for each sales hour
- 6) Cumulative Sale Dollars for each sales hour
- 7) Cumulative Hours worked, for each sales hour
- 8) Cumulative Average Sales Per Hour, for each hour worked.

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on a 80-column printer.

### D. Sales VS Labor Reports

The Sales VS Labor report provides a 3D Bar Graph detailing the Sales Dollars Produced and Labor Dollars expended for each hour in the selected report date. The Sales VS Labor report can be viewed for any employee, or for all employees combined. In addition to the 3D Bar Graph, the Sales VS Labor Report also provides a detail report that provides the back-up data used to create the 3D Bar Graph.

To view the Sales VS Labor Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Labor, then select Sales VS Labor from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a specific Employee Name, or All Employees, from the selection window that appears in the lower right quadrant of the screen.

Like all other Labor Reports, the Sales VS Labor Report is based in part on employee time records. Sales are only graphed if employee time has been recorded for the selected report date, since the purpose of the report is to detail sales VS actual hours worked. In addition, the Labor Dollars calculated are based upon the hourly rates keyed in for the employees. If no hourly rates are entered for the employees, then the resulting labor costs will be reported as 0.00 for all hours. Please see section 3.40 A for more information on setting up Employee Pay Rates.

To change the reporting date, touch Report Date, then use the Calendar Selection Screen to select a new reporting date. You may browse through the possible dates using the scroll bars next to the month and year indicators. To select a new date, simply touch the date on the calendar, and then press OK.

## **2.20 Labor Reporting (cont)**

### **D. Sales VS Labor Reports (cont)**

The detail report includes the following information:

- 1) A report header, including the name of the report, the employee selected and the date selected for the report.
- 2) Hour identifier, for each hour in which sales were entered
- 3) Total hourly sales amount, for each sales hour
- 4) Total hours worked, for each sales hour
- 5) Total Labor Dollars, for each hour worked
- 6) Total Labor as a Percentage of Sales, for each hour
- 7) Cumulative total hourly sales amount, for each sales hour
- 8) Cumulative total hours worked, for each sales hour
- 9) Cumulative total labor dollars, for each hour worked
- 10) Cumulative total labor as a percentage of sales, for each hour

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## **2.25 Ticket Detail Reporting**

### **A. Ticket Listing**

To view the Ticket Listing, touch the Reports control on the main menu screen. From the Manager Reports main menu, touch Ticket Detail, then select Ticket Listing from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a report date from the selection window that appears in the lower right quadrant of the screen and touch next.

### **B. Ticket Detail Reports**

Thanks to a unique data compression methodology, DiamondTouch saves all raw ticket information, even after the day has been closed, to provide management with detail reporting days, weeks, months, or even years after the day was closed. Information on Menu Items ordered, transaction detail and even driver information is saved for viewing at any time. In addition, DiamondTouch even allows the user to view the ticket history, including any changes or deletions, using the Ticket History “drill down” reporting feature. Finally, to allow Management the capability of creating its own custom reports, DiamondTouch allows the user to export and view the Ticket Detail in Microsoft Excel, without ever leaving DiamondTouch.

To view the Ticket Detail Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Ticket Detail, then select Ticket Detail from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a report date from the selection window that appears in the lower right quadrant of the screen.

## **2.25 Ticket Detail Reporting (cont)**

### **B. Ticket Detail Reports (cont)**

The Ticket Detail report contains the following information:

- 1) Report Header, including the name of the report, the reporting period, and the date and time that the report was accessed.
- 2) Ticket number, for each ticket
- 3) Table Number, for each ticket
- 4) Guest Count, for each ticket
- 5) Server Name, for each ticket
- 6) Service Type for each ticket
- 7) Order Time, for each ticket
- 8) Quantity, Description and Price for every item on every ticket
- 9) Subtotal, Tax and Total for each ticket
- 10) Itemized register transaction detail for each ticket including the name of the cashier, the tender method, amount tendered, change amount, the terminal number and cash drawer number and the time each transaction occurred.
- 11) Itemized delivery detail for each ticket including the driver name, time out, customer's phone number, time in, and delivery address.

#### **1. Ticket History Report**

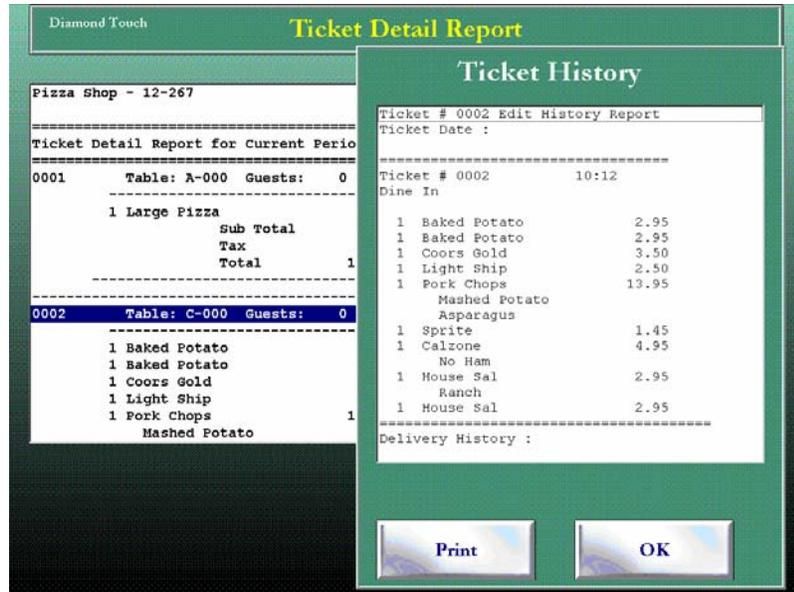
In addition to saving all of the final information for each and every ticket, DiamondTouch also saves each previous version of each and every ticket. This allows management to review any changes made to the tickets during the day, and to also view the earlier status of tickets edited to lower value, voided, or re-assigned to different drivers.

To view the Ticket History report, touch the Reports control on the main menu. From the Manager Reports main menu, touch Ticket Detail, then select Ticket Detail from the Sub-Menu in the lower left quadrant. Next, select a report date and then select the ticket from the summary report window that you wish to view. Touch the ticket number row on the report display and then touch the Ticket History control that appears on the lower control.

## 2.25 Ticket Detail Reporting (cont)

### B. Ticket Detail Reports (cont)

#### 1. Ticket History Report (cont)



The ticket history report displays the following information:

- a) Report header, including title of report, date report is viewed, ticket number, and the ticket date.
- b) For each version of the ticket that was saved and/or printed, the ticket number, time, service type and an itemized list of each line item including the quantity, description and price
- c) For each version of the ticket, the delivery history, including Driver, address, time OUT and time IN.

To print the Ticket History report, touch the print control on the Ticket History Pop Up window. The Ticket History Report will print to the first local printer found on the system. If no local printer is found, then the report will be spooled to the first system printer found. For more information on setting up local and system printers, see section 3.20 A.

The Ticket History Report was designed to print on 40 column printers.

## 2.25 Ticket Detail Reporting (cont)

### B. Ticket Detail Reports (cont)

#### 2. Exporting Ticket Detail to EXCEL

To export the Ticket Detail data to Microsoft Excel, you must first have a working copy of Microsoft Excel 97 loaded on the terminal.

To export the Ticket Detail data to Microsoft Excel 97, first pull up the Ticket Detail Report by touching the Reports control on the Main Menu. From the Manager Reports main menu, touch Ticket Detail, then select Ticket Detail from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a report date from the selection window that appears in the lower right quadrant of the screen. Touch Export to Excel to initiate the data conversion process.

After linking to Excel and exporting all data, DiamondTouch will prompt you to save the file (if the file was viewed earlier), and will ask if you want to view the report in Excel. Answer yes to both questions to view the report. Microsoft Excel 97 will appear on your screen with Worksheet 5 pre-loaded with the selected ticket line item data. For ticket summary data, touch Worksheet 4. For more information on working within Microsoft Excel to create your own reports, macros, etc, please refer to your Microsoft Excel 97 documentation package.

To return to DiamondTouch, select File, then Exit from within Microsoft Excel. You will be returned to the Ticket Detail Report window. Of course, once it has been saved, your Excel Spreadsheet can be viewed at anytime from within Microsoft Excel 97, with or without DiamondTouch.

### C. Event Log Reports

Event Log Reporting provides the primary interface tool required to perform Management by Exception auditing. By selecting specific exception events, you can use the drill down tool to investigate only those tickets that fall “outside” the usual operational norms.

DiamondTouch logs the following events as exceptions, and itemizes each event as a line item on the Event Log Summary Report:

1) **Tickets Edited to a Lower Value** details the following information:

- a) Time
- b) Terminal Number
- c) Employee Name
- d) Event Description “Edit to Lower Value”
- e) Ticket Number
- f) Beginning \$ Value
- g) Ending \$ Value
- h) Variance \$ Value

The Ticket Edited to a Lower Value event is logged whenever a ticket is recalled, changed and saved with a value lower than the original ticket value. Please see section 1.25 for more information on recalling tickets.

## 2.25 Ticket Detail Reporting (cont)

### C. Event Log Reports (cont)

2) **Void Tickets** details the following information:

- a) Time
- b) Terminal Number
- c) Employee Name
- d) Event Description "VOID Ticket"
- e) Ticket Number
- f) Beginning \$ Value
- g) Ending \$ Value
- h) Variance \$ Value

See section 1.37 for more information on Voiding a Ticket.

3) **Tickets Removed from a Driver** (Delivery Operations) includes the following information:

- a) Time
- b) Terminal Number
- c) Employee Name
- d) Event Description "Removed Driver Tkt#"
- e) Ticket Number
- f) from : Driver Name

A "Tickets Removed from Driver" event is logged whenever the Remove Ticket function is used from the Delivery Management screen [See section 1.90 - E for more information on using this function.]

4) **Late Dispatch** (Delivery Operations) includes the following information:

- a) Time
- b) Terminal Number
- c) Employee Name
- d) Event Description "Late Dispatch"
- e) Ticket Number
- f) Order Time
- g) Elapsed Time

A Late Dispatch event is logged each time a ticket is dispatched with an elapsed time greater than that specified by the user [ see section 1.90 D for more information on adjusting the Elapsed Time for driver dispatching].

### 5) Ticket History Report

In addition to saving all of the final information for each and every ticket, DiamondTouch also saves each and every *previous version* of each and every ticket. This allows management to review any changes made to the tickets during the day, and to also view the earlier status of tickets edited to lower value, voided, or re-assigned to different drivers.

To view the Ticket History report for the selected exception event, select the ticket from the summary report window that you wish to view, and touch the ticket number row on the report display. Touch the Ticket Detail control that appears on the lower control bar to view the Ticket History Report.

## 2.25 Ticket Detail Reporting (cont)

### C. Event Log Reports (cont)

#### 5) Ticket History Report (cont)

The ticket history report displays the following information:

- a) Report header, including title of report, date report is viewed, ticket number, and the ticket date.
- b) For each version of the ticket that was saved and/or printed, the ticket number, time, service type and an itemized list of each line item including the quantity, description and price
- c) For each version of the ticket, the delivery history, including Driver, address, time OUT and time IN.

To print the Ticket History report, touch the print control on the Ticket History Pop Up window. The Ticket History Report will print to the first local printer found on the system. If no local printer is found, then the report will be spooled to the first system printer found. For more information on setting up local and system printers, see section 3.20 A.

The Ticket History Report was designed to print on 40 column printers.

### D. Discount Detail - includes the following information:

- 1) Ticket Number
- 2) Time
- 3) Employee Name
- 4) Service Type
- 5) Amount
- 6) Description

To view the Discount Detail, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Ticket Detail, then select Discount Detail from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a report date from the selection window that appears in the lower right quadrant of the screen and touch next.

## 2.30 Database Reporting

Database Reporting provides basic print out of selected data in specific database files. Users may wish to use these print outs to assist in editing the various databases used in DiamondTouch.

### A. Employees

The employee listing is a report containing specific fields in the employee database. This report may be useful in supplying generic data to your payroll processor, or in getting an overview all employee records. For assistance in editing employee records, see section 3.40 A.

To view the Employee Database Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Database, then select Employees from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

The employee database listing provides the following information:

- 1) Employee Record Number
- 2) Last Name
- 3) First Name
- 4) Social Security Number
- 5) Date of Hire
- 6) Regular Hourly Rate
- 7) Overtime Hourly Rate
- 8) Phone Number
- 9) Street Address

The employee database listing does contain wage information. It is therefore protected with the same security level required to gain access to the employee database edit windows under the Set Up options. Please see section 3.40 B for more information on setting up security levels.

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### B. Menus

The menu report is a listing of all categories and items for the entire menu. The first 3 modifier lists used are also listed for each item. Modifier lists can be viewed and printed separately under the Modifier Lists report in the following section. Users may wish to use the Menu Report as a guide while editing the Menu.

To view the Menu Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Database, then select Menu from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

## 2.30 Database Reporting (cont)

### B. Menus (cont)

The Menu report lists the following information:

- 1) Category Number for each Menu Category
- 2) Category Description for each Menu Category
- 3) Min Max Settings for Inventory Ingredient Usage Reporting for each Menu Category
- 4) Item Number for each Menu Item
- 5) Item Description for each Menu Item
- 6) Item Price for each Menu Item
- 7) Referred to Modifier Lists for each Menu Item
- 8) PLU Reference Number for each Menu Item

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### C. Modifier Lists

The Modifier List report is a listing of all modifiers defined in the system. For more information on defining modifiers, see section 3.15 B. Users may wish to use the Modifier Report as a guide while editing the Modifier Lists.

To view the Modifier Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Database, then select Modifiers from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

The modifier report contains the following information:

- 1) Modifier List Number, for each modifier
- 2) Modifier Number, for each modifier
- 3) Modifier Description for each modifier
- 4) Price for each modifier
- 5) Half Price for each modifier
- 6) PLU Reference Number for each Modifier

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on a 80-column printer.

### D. PLU Tables

The PLU Table report defines all PLU's listed in the system. PLU's are used with optional Inventory packages to track the theoretical ingredient usage by food item ordered.

To view this report, you will need to have one of the optional inventory packages installed on the system. To view the PLU Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Database, then select PLU Table from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

## **2.30 Database Reporting (cont)**

### **D. PLU Tables (cont)**

The PLU report contains the following information:

- 1) PLU Number, for each PLU
- 2) Description, for each PLU Item
- 3) Price, for each PLU Item
- 4) Half Price, for each PLU Item
- 5) System Code, for each PLU Item
- 6) Address for each PLU Item
- 7) Current Usage flags, for each PLU Item

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## **2.35 Revenue Reporting**

### **A. Transaction by Ticket**

The Transaction by Ticket Report will list all tickets on all terminals and drawers for the specified reporting period.

To view the Transaction by ticket Report from the main menu screen, touch the Reports button, select Revenue, and then select Transaction by Ticket from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

The transaction by Ticket report contains the following information:

- 1) Report name and access date
- 2) Individual ticket number
- 3) Time order was placed
- 4) Drawer
- 5) Cashier
- 6) Tender used
- 7) Amount paid
- 8) Ticket amount
- 9) Change amount

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.35 Revenue Reporting (cont)

### B. Transaction by Drawer

The Transaction by Drawer Report will list all transactions on all terminals and drawers for the specified reporting period. To allow Management the capability of creating its own custom reports, DiamondTouch allows the user to export and view the Transaction Detail in Microsoft Excel, without ever leaving DiamondTouch.

To view the Transaction by Drawer Report, from the main menu screen, touch the Reports button, select Revenue, and then select Transaction by Drawer from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

Transaction information is sorted by each terminal and drawer "session". At the top of each terminal / drawer session, the report will list the terminal number, drawer number and the time the session was closed for this drawer. Detailed for each session is the following information:

- 1) Time the transaction was processed in military time format
- 2) Ticket number / alternate transaction code. Alternate transaction codes are :
 

SC = Starting Cash	[See Section 1.40 B]
SB = Starting Driver Bank	[See Section 1.90 B]
RB = Returning Driver Bank	[See Section 1.90 G]
CP = Cash Pull	[See Section 1.40 G]
PO = Paid Out	[See Section 1.40 H]
PI = Paid In	
NS = No Sale	[See Section 1.35 D]
- 3) Description - Ticket transactions will include the full ticket value under this heading
- 4) Cashier - this is the name of the employee that was signed on to the terminal when the transaction was processed
- 5) Amount - this is the amount that was keyed in for this transaction
- 6) Tendered - This is the Tender Method (Cash, Check, Credit Card, etc). In the case of a Driver Reimbursement transaction, the name of the driver is listed instead.
- 7) Chg / Due - a running total of how much of the total value is still due, or the amount of change that was issued for this transaction; Driver bank transactions will list the type of bank transaction under this column.

The Transaction by Drawer Report also includes footed totals for Total Transactions, Subtotal Dollars, Less Change amount and the Total Amount.

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

#### 1. Exporting Transaction by Drawer to EXCEL

To export the Transaction by Drawer data to Microsoft Excel, you must first have a working copy of Microsoft Excel 97 or later loaded on the terminal.

To export the Transaction by Drawer data to Microsoft Excel 97 or later, first pull up the Transaction Detail Report by touching the Reports control from the Main Menu. From the Manager Reports main menu, touch Registers, then select Transaction by Drawer from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Next, select a report date from the selection window that appears in the lower right quadrant of the screen. Touch Export to Excel to initiate the data conversion process.

## 2.35 Revenue Reporting (cont)

### B. Transaction by Drawer (cont)

After linking to Excel and exporting all data, DiamondTouch will prompt you to save the file, if the file was viewed earlier, and then to view the report in Excel. Answer yes to both questions to view the report. Microsoft Excel 97 will appear on your screen with Worksheet 4 pre-loaded with the selected transaction data. For more information on working within Microsoft Excel to create your own reports, macros, etc, please refer to your Microsoft Excel 97 documentation package.

To return to DiamondTouch, select File, then Exit from within Microsoft Excel. You will be returned to the Transaction Detail Report window. Of course, once it has been saved, your Excel Spreadsheet can be viewed at anytime from within Microsoft Excel 97, with or without DiamondTouch.

### C. Daily A/R

The Daily Accounts Receivable Report will list all A/R activities on all terminals and drawers for the specified reporting period.

To view the Daily A/R Report from the main menu screen, touch the Reports button, select Revenue, and then select Daily A/R from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

The transaction by Ticket report contains the following information:

- 1) Report name and access date
- 2) Individual ticket number
- 3) Time
- 4) Terminal
- 5) Drawer
- 6) Tender Key
- 7) Amount paid
- 8) Ticket amount
- 9) Change amount

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.35 Revenue Reporting (cont)

### D. Integrated CC Raw Data

The Integrated Credit Card Transaction Report will list all credit card activities on all terminals and drawers for the specified reporting period.

To view the Credit Card Transaction Report from the main menu screen, touch the Reports button, select Revenue, and then select Integrated CC Raw Data from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

The Integrated Credit Card Transaction Report contains the following information:

- 1) Report name and access date
- 2) Individual ticket number
- 3) Time and date
- 4) Ticket amount
- 5) Change Amount
- 6) Name on credit card
- 7) Type of credit card
- 8) Credit card number and expiration date
- 9) Authorization number
- 10) Merchant number
- 11) Approval/Denial response
- 12) Terminal number
- 13) Server name

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### E. Integrated CC Report

The Integrated Credit Card Transaction Report will list all credit card activities on all terminals and drawers for the specified reporting period.

To view the Credit Card Transaction Report from the main menu screen, touch the Reports button, select Revenue, and then select Integrated CC Report from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

Tkt#	Time	Status	Type	Base	Tip	Total	Server	Card #
0001	10:48	Sale	MC	0.11	0.00	0.11	Christine Fa	5439--0347
0002	10:53	CC-Tip	MC	0.00	0.01	0.01	Christine Fa	5439--0347
0003	10:58	- None	MC	0.22	0.00	0.22	Christine Fa	5439--0347
0004	10:42	CC-Tip	MC	0.00	0.02	0.02	Christine Fa	5439--0347
0015	11:22	Sale	MC	0.60	0.00	0.60	Christine Fa	5439--0347
0018	11:45	- None	MC	-0.04	0.02	-0.02	Christine Fa	5439--0347
0022	11:56	- None	MC	-0.04	0.02	-0.02	Christine Fa	5439--0347
0023	11:58	- None	MC	-0.04	0.02	-0.02	Christine Fa	5439--0347
0027	12:05	- None	MC	0.83	0.02	0.85	Christine Fa	5439--0347
0028	12:05	- None	MC	-0.87	0.02	-0.85	Christine Fa	5439--0347
0031	12:08	- None	MC	-0.04	0.02	-0.02	Christine Fa	5439--0347
0050	16:29	CC-Tip	MC	0.00	0.02	0.02	Christine Fa	5439--0347
0051	9:24	CC-Tip	MC	0.00	0.03	0.03	Christine Fa	5439--0347
0052	9:29	- None	MC	0.09	0.06	0.15	Christine Fa	5439--0347
0053	9:31	- None	MC	-0.15	0.00	-0.15	Christine Fa	5439--0347
0060	10:40	- None	MC	0.24	0.08	0.32	Christine Fa	5439--0347
0061	10:41	- None	MC	-0.40	0.08	-0.32	Christine Fa	5439--0347
			MC	0.51	0.42	0.93		
			Total	0.51	0.42	0.93		

## 2.35 Revenue Reporting (cont)

### E. Integrated CC Report (cont)

The Integrated Credit Card – Settle Correct Report contains the following information:

- 14) Ticket Number
- 15) Time of Order
- 16) Status of the ticket (Sale, CC-Tip, Sale w/CC-Tip, or Void)
- 17) Type of credit card
- 18) Base amount of ticket
- 19) Tip Amount of ticket
- 20) Total Amount
- 21) Server Name
- 22) Card Number with encryption
- 23) Name of Card Member

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### F. Cashier Summary

The Cashier Summary Report is a breakdown of all cashier activity for the specified reporting period. To view the Cashier Summary Report from the main menu screen, touch the Reports button, select Revenue, and then select Cashier Summary from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

The Cashier Summary Report contains the following information:

- 1) Report name and access date
- 2) Cashier name, terminal number and drawer
- 3) NS
- 4) Total cash
- 5) Total checks
- 6) Total A/R
- 7) Total other types of transactions
- 8) Total for all transactions
- 9) Pay outs
- 10) Pay ins
- 11) Reimbursements
- 12) Pull
- 13) Net cash

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.35 Revenue Reporting (cont)

### G. Summary by Drawer

The Summary by Drawer provides subtotal amounts for each terminal cash drawer session. Each time a cash drawer is closed, totals for the drawer are stored in the Closing Summary Report. At the end of the day, all closing summary totals can be viewed on one report by selecting the Register Summary by Drawer Report.

To view the Register Summary by Drawer Report, from the main menu, touch the Reports control, touch Registers, then select Summary by Drawer from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

The Summary by Drawer Report is divided into three sections:

1) **The Register Summary** includes the following information:

a) For each cash Drawer Session :

- Trm Terminal number for each session
- CD Cash drawer for each Session
- Close Time Time the register session was closed
- Cash Start Amount of starting cash when the drawer was opened
- Cash Rcpts Amount of cash receipts, less change issued
- Cash Debits Paid Outs, Paid Ins, Cash Pulls, Reimbursements
- Cash SubTtl Cash Start + Cash Rcpts - Cash Debits
- Check Rcpts Total Check Receipts
- Other Receipts Total Credit Card, Misc Tenders

b) Footed totals for each Cash Drawer, Terminal and Grand Total

c) Net Receipts Revenue Summary

d) Gross Revenue Summary

2) **The Other Receipts** detail breaks down each of the credit card totals for each session

3) **The Cash Debits** Detail breaks down the Paid Outs, Cash Pulls and Reimbursements for each session.

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### H. Period A/R by Customer

The Period A/R by Customer Report is a list of all the A/R transactions for the specified reporting period.

To view the Period A/R Report from the main menu screen, touch the Reports button, select Revenue, and then select Period A/R by Customer from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

## 2.35 Revenue Reporting (cont)

### H. Period A/R by Customer (cont)

Rockland Technology - 00001				
Period Customer Sales Report				
Period Sales Report for 20011105A through 20011105A				
Accessed on 11-05-2001 11:39:21 AM				
Factor, Christine	222222	Amount	A/R	Tender/Ttl
11/05/2001	8 100 ABC / line 2 *		13.91	Dyna AR
Totals		0.00	13.91	13.91
Justman Todd A,	18144	Amount	A/R	Tender/Ttl
11/05/2001	11		11.77	Dyna AR
Totals		0.00	11.77	11.77
Mayerchak Jennife	14849	Amount	A/R	Tender/Ttl

The Period A/R by Customer Report contains the following information:

- 14) Report name, period and access date
- 15) Customer name on the A/R account
- 16) A/R Account number
- 17) Date of transaction
- 18) Ticket Number
- 19) A/R Account address
- 20) Amount of ticket
- 21) Total for all A/R transactions for account
- 22) Tender type
- 23) Totals

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### I. Balance Cash

Each time the day is closed, a Balance Cash Report is saved. The balance cash report is the final daily revenue report for the day, which reconciles cash and other revenues collected with the sales total and final deposit slip. See section 2.60 for more information on closing the day.

To view the Balance Cash Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Registers, then select Balance Cash from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next. The Balance cash report is a divided into three (3) sections:

- 1) **The Revenue Reconciliation** lists the final receipt totals for cash, checks, credit cards, etc. These totals are loaded from the Register Summary Totals, and edited by the user that actually closes the day to account for mis-rings and M.T.T's. The receipts are totaled and balanced to the Sales total for the day. The result is listed at the bottom of the Revenue Reconciliation as "Balance Revenue Over/Short". This number should always equal zero if the auto close procedure is used correctly.

## 2.35 Revenue Reporting (cont)

### I. Balance Cash (cont)

- 2) **The Cash Reconciliation** itemizes the cash activity for the day, and compares the reported activity with actual cash counted. The cash reconciliation includes the following information:

Starting Cash Adj. +	
Cash Receipts	+
Pay Outs	-
Reimbursed	-
Previous Cash	
Deposited	-
<hr/>	
Subtotal Cash	
In Drawers	=
Cash Count	+/-
<hr/>	
Balance Cash	
Over/Short	=

The user that closes the day enters the cash count. The balance cash over/short reports the Cash Over or Cash Short for the day.

- 3) **The Final Deposit Slip** itemizes the cash and checks to be deposited. An allowance is made to deduct the next day's starting cash bank, as well as any checks that were already deposited. These amounts (if any) are entered by the user that closes the day. The Final Deposit Slip includes the following information:

Cash Count	+
Tomorrow's	
Starting Cash	-
<hr/>	
Cash Deposit	=
Checks	+
Checks Prev	
Deposited	-
<hr/>	
Check Deposit	=
<hr/>	
Total Deposit	=

The total Deposit is the sum of the Cash Deposit plus the Check Deposit.

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## **2.35 Revenue Reporting (cont)**

### **J. Period Pay In/Out**

The Period Pay In/Out Report is a weekly register transaction report for the specified reporting period.

To view the Period Pay In/Out Report from the main menu screen, touch the Reports button, select Revenue, and then select Period Pay In/Out from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the Lower Right quadrant of the screen, and press Next.

The Period Pay In/Out Report contains the following information:

- 1) Report name and access date
- 2) Description of transaction
- 3) Cashier
- 4) Amount of transaction
- 5) Tendered

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## **2.40 Delivery Reporting**

### **A. Delivery Summary Reports**

The Delivery Summary Report provides a list of all driver activity for the reporting period, including number of runs, tickets and dollars for each driver. The report can also be used to “Drill Down” to the Driver Detail Reports described in section 2.40 B.

To view the Delivery Summary Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Delivery, then select Summary Report from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

The Driver Summary Report details the following information:

- 1) Date & Time of Report
- 2) Name of Report
- 3) Driver Name, for each driver
- 4) Driver Status (Open / Closed) for each driver
- 5) Total # Runs for each Driver
- 6) Total # Tickets for each driver
- 7) Total \$ for each driver

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### **B. Driver Detail Reports**

The driver detail report allows the user to view the individual tickets and individual driver run data that were used to compile the summary data. The driver detail report is available as a “Drill Down” report from the Driver Summary Report display screen.

To access a Driver Detail Report, first access the Driver Summary Reports detailed in the previous section. Select a driver by touching the driver’s name, and then touch Driver Detail control that will appear on the lower command bar. A pop up window will display the Driver Detail Report.

The Driver Detail Report contains the following information:

- 1) Date & Time of Report
- 2) Name of Report
- 3) Driver Name
- 4) Ticket Detail Report, including the Run Number, Ticket Number, Delivery Address and Dollar Amount for each ticket.
- 5) Total Ticket Dollars
- 6) Outstanding Bank
- 7) Total Driver Amount
- 8) Run Detail Report, including the Run #, Time Out, Time In, Total Time, Total Tickets, Average time Per Ticket and Total Ticket Amount for each Run
- 9) Footed Totals for the Run Detail Report.

Driver Detail Reports can be printed by touching the Print control button located at the bottom of the detail report pop up box. The Driver Detail Report will print on the first local printer found on the current terminal; if no local printer is found then the report will be spooled to the first system printer found. For more information on setting up local and system printers, please see section 3.20 A. The server detail report was designed to print on a 40-column printer.

## **2.45 Customer Reports**

### **A. Daily Customer Sales by Ticket**

The Daily Customer Sales by Ticket Report lists each customer that ordered during the business day. To be entered on the Customer Sales by Ticket Report, the order must have been placed with a customer record associated with the order.

To view the Daily Customer Sales by Ticket Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select Daily Customer Sales by Ticket from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

The Daily Customer Sales by Ticket Report includes the following information:

- 1) Report Title, Reporting Period, and the Date and Time the Report was accessed
- 2) Ticket Number
- 3) Time the order was placed
- 4) Customer Phone Number
- 5) Customer Name
- 6) Customer Address
- 7) Order Dollar Amount
- 8) Tender

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### **B. Daily Customer Sales by Customer**

The Daily Customer Sales by Customer Report lists each customer that ordered during the business day. To be entered on the Customer Sales by Customer Report, the order must have been placed with a customer record associated with the order.

To view the Daily Customer Sales by Customer Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select Daily Customer Sales by Customer from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

The Daily Customer Sales by Customer Report includes the following information:

- 1) Report Title, Reporting Period, and the Date and Time the Report was accessed
- 2) Order Date
- 3) Ticket Number
- 4) Customer phone number, name and/or address
- 5) Order Dollar Amount
- 6) Accounts Receivable
- 7) Tender and Total

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.45 Customer Reports (cont)

### C. Daily Customer New VS. Repeat

The Daily Customer New vs. Repeat Report is a daily breakdown of new vs. repeat customers for the selected period.

To view the Daily Customer New vs. Repeat Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select Daily Customer New vs. Repeat from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

The report is broken down into 2 sections – new customers and repeat customers.

The Daily Customer New vs. Repeat Report includes the following information for New Customers:

- 1) Reporting Period, and the Date and Time the Report was accessed
- 2) Phone Number
- 3) Customer Name
- 4) Customer Address
- 5) Previous Orders
- 6) Current Orders

The Daily Customer New vs. Repeat Report information for Repeat Customers is listed at the bottom of the report. It includes the following:

- 1) Reporting Period, and the Date and Time the Report was accessed
- 2) Phone Number
- 3) Customer Name
- 4) Customer Address
- 5) Previous Orders
- 6) Average Frequency
- 7) Days Since Last Order (SLO)
- 8) Current Orders

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.45 Customer Reports (cont)

### D. Create Report

The Create Report option under Customer Reports allows for set guidelines to be customized.

To view the Create Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select Create Report from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

The report can be customized based on the following:

- 1) The **Activity Filters Section** allow Sales, Orders and Days Since Last Order to be broken down by specific time/dollar amount or to group all together
- 2) The **Sort Section** allows the custom report to be sorted by the following:
  - a) Name
  - b) Sales
  - c) Orders
  - d) Zip
- 3) The **Search Keys Section** allows the custom report to be sorted by the following:
  - a) Last Name
  - b) First Name
  - c) Street
  - d) Comments
  - e) Zip Code
  - f) Carrier Route
  - g) Map Grid 1
  - h) Map Grid 2

To use the search keys correctly, you must always put an asterisk before and after the item you will use to search. (example: \*75019\* when searching by zip code).

## 2.45 Customer Reports (cont)

### E. Customer Period Sales Report

The Customer Period Sales Report option under Customer Reports provides weekly sales report by customer.

To view the Customer Period Sales Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select Customer Period Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

The report provides the following information:

- 1) Report Title
- 2) Weekly Sales Period
- 3) Date and time report was accessed
- 4) Date of Order
- 5) Ticket Number
- 6) Customer phone number, name, and address
- 7) Amount
- 8) Accounts Receivable
- 9) Tender and Total

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### F. Monthly Customer New VS. Repeat

The Monthly Customer New vs. Repeat Report provides a summary of new, repeat and total customers for each day of the month. Also provided is an itemized listing of all new and repeat customers. Finally, a 3-D line graph is provided to display the New VS Repeat business for each day of the month.

To view the Monthly Customer Report, touch the Report control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select Monthly Customer New vs. Repeat from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the Report Period Selection Window in the lower right quadrant of the screen, and press Next.

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

The Monthly Customer New vs. Repeat Report includes the following information:

- 1) **Daily Summary Totals**
  - a) Day of Week and Date for each day of the month
  - b) Total New Customers for each day of the month
  - c) Total Repeat Customers for each day of the month
  - d) Total All Customers for each day of the month

## 2.45 Customer Reports (cont)

### F. Monthly Customer New VS. Repeat (cont)

#### 2) New Customers

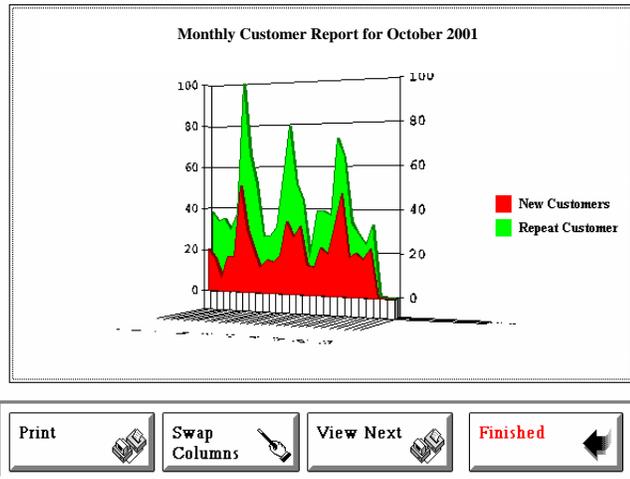
- a) Phone Number, for each new customer
- b) Last Name, First Name for each new customer
- c) Address for each new customer
- d) Total Previous Orders for each new customer - These are the total orders prior to the reporting period
- e) Total Current Orders for each new customer - These are the total orders for the reporting period
- f) Total Subsequent Orders for each New Customer - These are the total orders for each customer placed after the reporting period.

#### 3) Repeat Customers

- a) Phone Number for each previous customer
- b) Last Name, First Name for each repeat customer
- c) Address for each repeat customer
- d) Total Previous Orders for each repeat customer
- e) Average Frequency for each repeat customer. This is the total number of orders divided by the number of days between the first order and the report period date.  
Days SLO - Days Since Last Order. This is the number of days between the last order date and the last date of the reporting period.
- f) Total Current Orders for each repeat customer. These are the total orders placed during the reporting period.

#### 4) Graphing New VS Repeat Customers

To display an Area Line Graph of New vs. Repeat Customers, touch the Display Chart Control at the bottom of the Monthly Customer Report Screen. The graph will display new customers in Red, Repeat Customers in Green.



To view alternate angles of the graph, touch the View Next Control. To move the repeat customer data to the foreground, touch Swap Columns. To print the graph, touch Print to send the graph to the windows default printer.

The graph can also be sized and positioned dynamically, by holding down the control key on the keyboard, and moving the graph by touching the touch screen. To return, touch Finished.

## 2.45 Customer Reports (cont)

### G. All Customers New VS. Repeat

The All Customers New vs. Repeat Report provides New and Repeat Customer data for all customers in the system.

To view the All Customers Report, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Customers, then select All Customers New vs. Repeat from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

The All Customers Report includes the following information:

#### 1) New Customers

- a) Phone Number, for each new customer
- b) Last Name, First Name for each new customer
- c) Address for each new customer
- d) Total Previous Orders for each new customer - These are the total orders prior to the reporting period
- e) Total Current Orders for each new customer - These are the total orders for the reporting period

#### 2) Repeat Customers

- a) Phone Number, for each new customer
- b) Last Name, First Name for each new customer
- c) Address for each new customer
- d) Total Previous Orders for each repeat customer  
Avg Freq - Average Frequency for each repeat customer. This is the total number of orders divided by the number of days between the first order and the report period date.  
Days SLO - Days Since Last Order. This is the number of days between the last order date and the date of the reporting period.
- e) Total Current Orders for each repeat customer. These are the total orders placed during the reporting period.

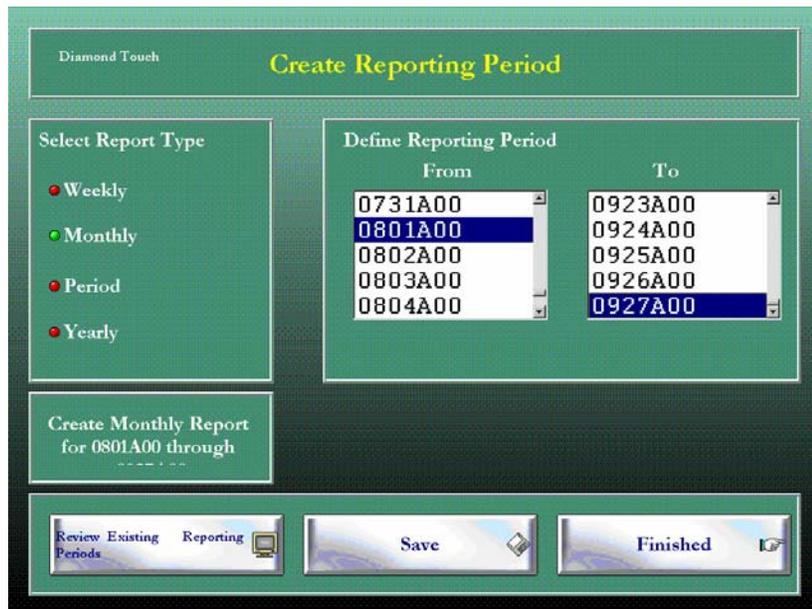
To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## 2.50 Report Periods

### A. Defining Reporting Periods

Reporting Periods are used by the Period Sales [2.10 D], Period Item [2.10 E] Period Modifier [2.10 F] and Period Server Sales By Item [2.50 C] reports to define the range of dates used to create the reports. Reporting periods can be created for Weekly, Monthly, Period (example: Quarterly) and Yearly Reports. Date ranges can be established for as many reporting periods are required, and can even overlap if required.

To access the Reporting Period Module, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Custom Reports, then select Set Report Periods from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.



Before creating a new reporting period, you may wish to review the list of reporting periods already created. To do so, touch the Review Existing Reporting Periods control located at the lower left portion of the lower control bar. A new window will open up with the list of currently resident reporting periods, sorted within Weekly, Monthly, Period and Yearly columns.

To delete a reporting period, touch the reporting period and then touch Erase. Note that no actual report data is deleted ... only the reporting period “From-To” dates. The Reporting Period can be re-created in seconds from the Reporting Period screen. Press Finished to return to the Reporting Period Screen.

To create a new reporting period, select the reporting period type from the four choices provided in the upper left portion of the screen. Next, use the “From” date selection window to select the first day of the new reporting period. Use the “To” selection window to select the last day of the new reporting period. Note that the report description is displayed in the small window in the middle left hand portion of the screen as selections are made. Once the report type and from / to date ranges have been made, touch the Save button to save the new reporting period. You may view the new period by touching the Review Existing Reporting Periods control. The new Report Period will be listed in the appropriate window. When completed, press finished.

## 2.50 Custom Reports (cont)

### B. Daily Server Sales By Item

The Daily Server Sales by Item Report is a report of sales for a selected Menu Item broken down by Server. The Daily Server Sales by Item report is very useful for tracking performance on sales contests for specials, etc. The report display also provides a scrollable control set to browse through the various Menu Items and Categories for the selected reporting period.

To access the Reporting Period Module, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Custom Reports, then select Item / Server Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

The Daily Server Sales Report initially displays sales for the Menu Item that was loaded into Category 1, Item 1 on the last day of the reporting period. To view alternate sales breakdowns, use the Category and Item scroll arrows to browse through the Menu. If any items have been sold for the reporting period, then the name of the menu item will be displayed in the upper right corner of the report window and the sales distribution will appear next to the server names.

The Daily Server Sales by Item report includes the following information:

- 1) Title of the report, including the reporting period and date and time the report was accessed
- 2) Category #, Item #, and Item Description (if sales are reported)
- 3) Server Name, for each server on duty during the reporting period
- 4) Total Items sold for each server
- 5) Total dollars sold for each server. Note that the value of Menu Modifiers associated with the Menu Item on each ticket are included in the total dollars figure. This is why the unit price may vary from server to server.
- 6) Total tickets for each server that included at least one of the selected items
- 7) Footed totals for item quantity, Sales and tickets for all servers combined

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

### C. Period Server Sales By Item

The Period Server Sales by Item Report is a report of sales for a selected Menu Item broken down by Server over the course of a selected reporting period. The Period Server Sales by Item report is very useful for tracking performance on sales contests for specials, etc over a period of days, weeks or month(s).

To access the Reporting Period Module, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Custom Reports, then select Period Item / Server Sales from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select a reporting period, then select the Category and Menu Item you wish to view. Press Next, and a progress bar will appear as the report is being built.

## **2.50 Custom Reports (cont)**

### **C. Period Server Sales By Item (cont)**

The Period Server Sales by Item report includes the following information:

- 1) Title of the report, including the reporting period and date and time the report was accessed
- 2) Category #, Item #, and Item Description (if sales are reported)
- 3) Server Name, for each server on duty during the reporting period
- 4) Total Items sold for each server
- 5) Total dollars sold for each server. Note that the value of Menu Modifiers associated with the Menu Item on each ticket are included in the total dollars figure. This is why the unit price may vary from server to server
- 6) Total tickets for each server that included at least one of the selected items
- 7) Footed totals for item quantity, Sales and tickets for all servers combined.

To print the report, touch the Print control on the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.

## **2.60 Utilities**

### **A. Run File Back Up**

File Back Up is used to back up sales, menu, time clock data, customer database, DiamondTouch settings, and employee information. DiamondTouch will automatically back up when you close a station.

Rockland Technology recommends that you rotate the satellite stations from which you close nightly. This will ensure that you have a recent back up for each station.

To access the Run File Back Up, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Utilities, then select Run File Back Up from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

### **B. Launch ISI**

ISI is a third party inventory software program that must be purchased and loaded on DiamondTouch to use.

To access Launch ISI, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Utilities, then select Launch ISI from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

## **2.60 Utilities (cont)**

### **C. Launch Chef Tec**

Chef Tec is a third party inventory software program that must be purchased and loaded on DiamondTouch to use.

To access Launch Chef Tec, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Utilities, then select Launch Chef Tec from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

### **D. Launch Optimum Control 2001**

Optimum Control 2001 is a third party inventory software program that must be purchased and loaded on DiamondTouch to use.

To access Launch Optimum Control 2001, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Utilities, then select Launch Optimum Control 2001 from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen.

## **2.70 Options**

### **A. Export Inventory**

Export Inventory Report provides information on the inventory available. The report is used in conjunction with your inventory system. The following information is provided on the Inventory Report:

- 1) PLU number
- 2) Item sold
- 3) Quantity sold
- 4) Retail price before discount

To access Export Inventory, touch the Reports control on the Main Menu screen. From the Manager Reports main menu, touch Utilities, then select Export Inventory from the Sub-Menu Selection Window in the lower left quadrant of the Manager Reports screen. Select the desired reporting period from the lower right quadrant and then touch Next.

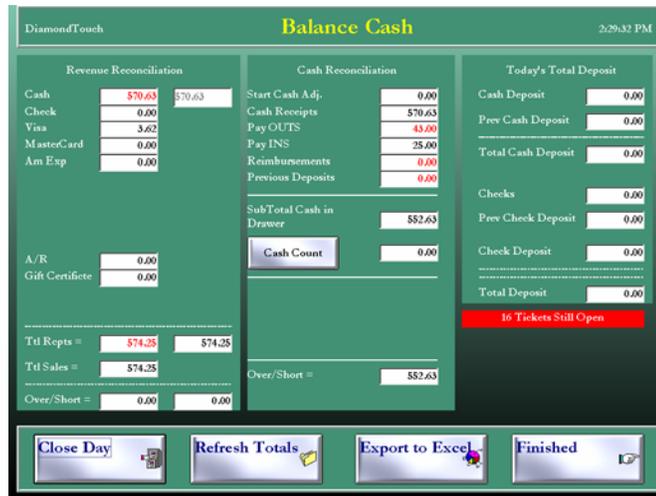
## 2.80 Close of Day

At the end of each business day, the day is closed to finalize totals and reset the system for the next day's business. The day must be closed either at the end of the business day, or just before the next business day begins.

It is strongly recommended, although not required, that all tickets be cashed out before closing the day [see section 1.35]. If the tickets are not cashed out, then many of the report totals will be out of balance on the final reports.

Before the day can be closed, all drivers must be Closed Out [Section 1.90 H] and all Cash Drawers must be closed [Section 1.40 I]. Always close the drivers out first, since you must be signed on to an open drawer to close out the drivers.

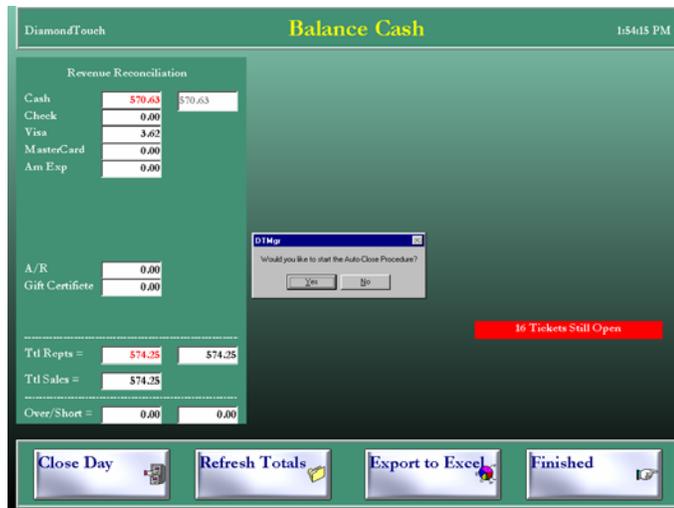
To close the day, from the main menu, touch Reports and then select Close Day. Touching the Close Day button will bring up the Balance Cash Worksheet.



### A. Auto Close

DiamondTouch has simplified the Close of Day procedure with the Auto close feature. Auto Close will walk you through the process step by step.

To access Auto close from the main menu, touch Report, and then select Close Day. The Balance Cash screen will appear and ask if you would like to begin the Auto Close procedure.



## 2.80 Close of Day (cont)

### A. Auto Close (cont)

To continue, touch yes on the pop up box. Next, the Auto Close process will ask you if the totals on the Revenue Reconciliation portion of the Balance Cash screen are correct. Always answer no to this pop up box.

This will allow you to correctly enter all transaction totals in on the next pop up box. Now enter all the correct amounts on hand in your cash drawer and then touch next.

Below is an example of why it is important to always select NO in the pop up box verifying if totals are correct.

<b>Ticket</b>	<b>Ticket Amount</b>	<b>Tender type used</b>	<b>Tender type entered by employee</b>
#1	\$11.10	Cash	Check
#2	\$13.26	Visa	Cash
#3	\$14.00	Check	Check
#4	\$21.56	Visa	Cash

DiamondTouch has the following amounts recorded:

Cash	\$34.82
Check	\$25.10
Credit Card	\$00.00

Actual amounts in cash drawer:

Cash	\$11.10
Check	\$14.00
Credit Card	\$34.82

## 2.90 Time Cards

To access the Employee Time Cards, touch the Reports control on the main menu, then touch Time Cards. The Time Card function is protected by a dedicated security level, so the user must have a security level at least as high as the level set for Time Cards before this function can be accessed.

**Diamond Touch Time Cards**

MORRISON, DAVID 0016  
03/22/98 - 04/04/98

---

Mon 03/23 IN 11:00 1  
Mon 03/23 OUT 19:12 8:12 5.50

---

Tue 03/24 IN 10:14 2  
Tue 03/24 OUT 18:13 7:59 8.00

---

Total Code 1 : 8:12  
Total Code 2 : 7:59  
Total Code 3 : 0:00  
Total Code 4 : 0:00  
Total Code 5 : 0:00  
Total Hours : 16:11

MORRISON / ADRIANNE  
MORRISON / DAVID  
MORRISON / WADE  
MURCHIE / DOUG  
PILGREEN / DWIGHT  
WASHINGTON / RICHARD  
WASHINGTON / RICHARD

Print Pay Periods Exit

### A. Viewing Employee Time Cards

To view an employee's time card for the current period, select the employee name from the list provided in the upper right portion of the screen. Note that you can scroll through the list of employee time cards by using the up / down arrows on your keyboard to move through the list of employee names.

Each time card will list the employee name, record number and the pay period at the top of the time card. For each Clock IN line, the day of the week, date and time IN and job code will be listed. For each Clock OUT line, the day of the week, date and time OUT, total time worked and declared tips are shown. At the bottom of the time card, the total hours for each job code are listed and totaled. Total tips are shown at the very bottom of the Time Card.

### B. Printing Employee Time Cards

To print the employee time card currently displayed, touch the Print control at the bottom of the screen. The time card will be printed to the first local printer found on the system. If no local printer is found, then the time card will print on the first system printer found. See section 3.20 A for more information on setting up local and system printers.

## 2.90 Time Cards (cont)

### C. Viewing and Adjusting Pay Periods

To change the Pay Period, touch the Pay Period control at the bottom of the Time Card screen, then use the Calendar Selection Screen to select a new Pay Period. You may browse through the possible dates using the scroll bars next to the month and year indicators. To select a new Pay Period, simply touch any date within the Pay Period, and the Pay Period for that date will be highlighted. Press OK to select the reporting period.

If you wish to adjust your Pay Period, touch the Set Pay Period control on the Pay Period screen. You may select either a weekly or a bi-weekly pay period, then touch any ending date of your Pay Period as a sample. The highlighted dates will correspond to your weekly or biweekly pay period.



Touch the Create New Pay Period control and your new Pay Periods will have been set up.

DiamondTouch will automatically “find” all previous and subsequent Pay Periods when needed based on the sample pay period you have provided.

## 2.90 Time Cards (cont)

### D. Editing Employee Time Cards

Time Cards can be edited directly from the display screen. You may add, delete or replace time card entries.

#### 1) Adding a New Entry

To add a new entry to a time card, touch one of the dashed lines on the time card display as shown below. This will bring up all of the controls needed to add a new entry.

The screenshot shows the 'Time Cards' application interface. At the top, it displays 'Diamond Touch' and 'Time Cards'. Below this, the employee information 'MORRISON, DAVID' and '0016' is shown, along with the pay period '03/22/98 - 04/04/98'. A list of time card entries is displayed, including dates, times, and codes. A dashed line is shown under the entry for 'Tue 03/24 OUT 18:13 7:59 8.00'. To the right of the list is a 'Clock' section with 'IN' and 'OUT' buttons, and a 'Description' dropdown menu showing '3' and '4'. Below the list is a 'Total' section with 'Total Code 1' through 'Total Code 5' and 'Total Hours : 16:11'. To the right of the list is a 'New Date' section with a date display '03/25/1998' and left/right arrow controls. Below the date is a 'New Time' section with 'Hour' and 'Min' buttons, and a time display '07:08' with left/right arrow controls. At the bottom of the screen are 'Add' and 'OK' buttons.

First, select either Clock IN or OUT to indicate the type of entry you wish to make. If the new Entry is a Clock IN, you are given the opportunity to select a Job Description 1,2,3,4 or 5. If the new Entry is a Clock OUT, then you are given the opportunity to enter the declared Tips amount.

Select the New Date using the left & right arrow controls under the New Date display. You may choose any date that falls within the defined Pay Period. Touch the Hour control, and use the left & right arrow controls under New Time to select the hour of the new record, then touch Min and use the same controls to select the minutes. (NOTE: You may hold the controls in to allow the values to scroll, rather than touching the control for each new value). Once you have selected the new date and time, touch Add to add the new record to the Time Card. The Time Card will re-sort the Clock IN and OUT entries each time you add a new entry.

#### 2) Deleting an Entry

To delete an entry, touch the entry you wish to delete, and then touch the Delete control that appears at the bottom of the screen.

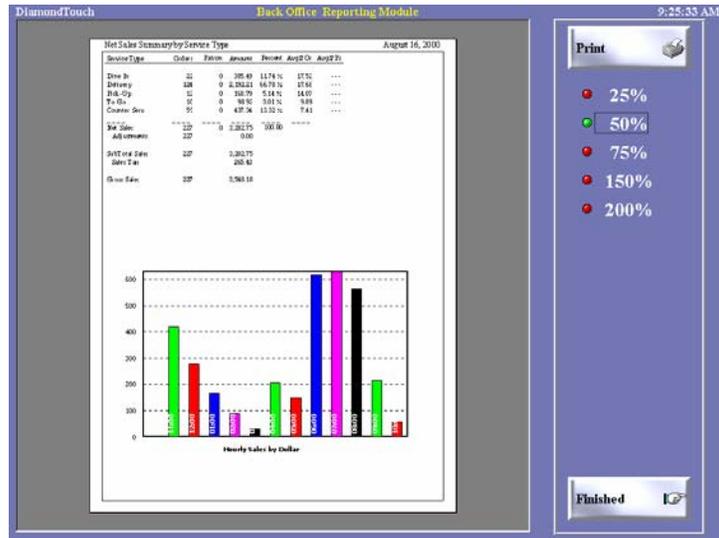
#### 3) Replacing an Entry

To replace, or edit, an existing entry, touch the entry you wish to edit and use the New Date and New Time controls to select the new Date and Time. Note that you may not “cross over” an existing entry. Once you have “dialed in” the new time, touch Replace to change the entry.

## 2.95 Back Office

### A. Daily Sales Report

Daily Sales Report provides an overall look at sales. To access the Daily Sales Report from the main menu, touch Reports, select Back Office, select the appropriate day from the calendar on the screen and then select the Daily Sales button.



The Daily Sales Report provides the following information:

- 1) Service type (dine-in delivery, etc)
- 2) Number of orders
- 3) Number of patrons
- 4) Total amount for each service type
- 5) Percentage of Sales for each service type
- 6) Average sales amount
- 7) Net Sales
- 8) Adjustments
- 9) Sub Total
- 10) Sales tax
- 11) Gross sales

## 2.95 Back Office (cont)

### B. Daily Performance Report

To access the Daily Performance report from the main menu, touch Report, select Back Office, select the appropriate day for your report and then touch the Daily Performance button. The report will appear on the left side of your screen. To enlarge your view of this report, touch the zoom button at the bottom of the screen.

**Daily Performance Report**

09:00:00 PM 09/11/2007

Sales by Category Summary				
Order Qty	Net Sales	% Net Sales	% Net Sales	% Net Sales
Phone	20	400.00	92.9%	92.9%
Order	0	0.00	0.0%	0.0%
Devices	1	17.00	2.2%	2.2%
Devices	2	10.00	1.3%	1.3%
Claims	0	0.00	0.0%	0.0%
Service	1	2.00	0.2%	0.2%
Specialties	2	4.00	0.4%	0.4%
Misc.	2	7.00	0.8%	0.8%
<b>Total</b>	<b>40</b>	<b>428.00</b>	<b>100.0%</b>	<b>100.0%</b>

Tax Summary		
Tax Type	Taxable	Tax Amount
Taxable	400.00	22.07
Non-Taxable	0.00	0.00
<b>Total</b>	<b>400.00</b>	<b>22.07</b>

Sales by Order Type					
Order Type	Order Qty	Net Sales	% Net Sales	Avg. \$ Per Order	Avg. \$ Per Person
Delivery	7	100.00	20.5%	14.29	0.00-0.00
Pick-Up	0	0.00	0.0%	0.00	0.00-0.00
Counter Service	0	0.00	0.0%	0.00	0.00-0.00
<b>Total</b>	<b>7</b>	<b>100.00</b>	<b>20.5%</b>	<b>14.29</b>	<b>0.00-0.00</b>

Cost Summary				
Order Type	Qty	Cost	% of Net	% of Net
Manager	0.00	0.00	0.0%	0.0%
Cost	0.00	0.00	0.0%	0.0%
Service	0.00	0.00	0.0%	0.0%
COO	0.00	0.00	0.0%	0.0%
HR	0.00	0.00	0.0%	0.0%

Adjustments	
Adj. Type	Amount
Net	400.00
+Inv	0.00
+Disc	0.00
+Net Sales	400.00

Print 25% 50% 75% 150% 200% Finished

The Daily Performance Report provides the following information:

- 12) Sales by Category Group
- 13) Receipts Summary by Payment Method including all tenders
- 14) Revenue Summary including Pay Ins, Pay Outs, Reimbursements, and Delivery Charges.
- 15) Deposit Summary
- 16) Tax Summary including Taxable and Non-Taxable items
- 17) Sales by Order Type
- 18) Labor Summary by Employee Job Type
- 19) Adjustments & Discounts
- 20) PayIn/Pay Out Summary

To print the report, touch the Print control at the lower left of the report display screen. The detail report will print to your Windows default printer. This report was designed to print on an 80-column printer.



## PART 3 Set Up

The Set Up portion of the DiamondTouch Restaurant Management System is used to configure your Terminal Settings, Order Entry Menu, Employee and Customer Files, Security Levels and other functions within the system. Many of these settings, such as your Printers, Ticket Set Up, and Network settings, may have been set up by your Rockland Technology representative, and may never need to be adjusted. Other settings, such as the Employee Set Up or your Menu, may need to be accessed from time to time to make minor changes.

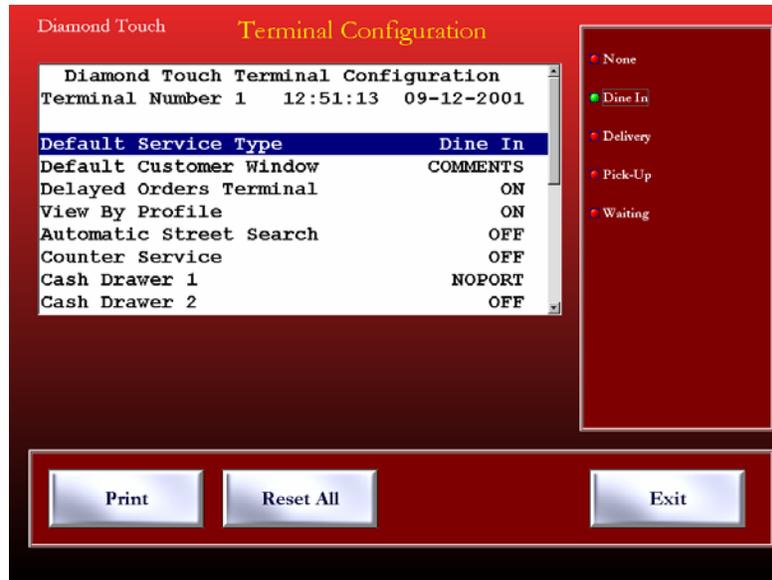
The following sections describe each of the Set Up options in your system. If you are unsure of how to use any of these settings, please call your Rockland Technology representative for assistance before making any changes to your Terminal, Ticket, Network or Printer settings.

To access the Set Up Main Menu screen, from the main menu touch Reports, then touch Set Up. The DiamondTouch Setup program will read your terminal settings, and the Setup Main Menu will appear.

### 3.10 Terminal

#### A. Terminal Configuration

The Terminal Configuration screen is used to set up the basic operating properties of each terminal on the system. To access the terminal settings screen from the main menu, touch Set Up, select Terminal and then touch the Terminal Configuration button on the right hand of the screen.



To print the Terminal Settings, touch the Print control at the lower left of the Terminal Configuration screen. The report will be printed to the first local printer found on the system. If no local printer is found, the report will spool to the first system printer found. For more information on setting up Local and System printers, see section 3.20 A.

To reset the Terminal Settings after making adjustments, but before exiting the Terminal Configuration screen, touch Reset All. Once you exit the Terminal Configuration screen, the currently displayed settings will be saved as the new settings.

### 3.10 Terminal (cont)

#### A. Terminal Configuration (cont)

##### 1) Default Service Type

The Default Service Type is designed to save one touch at the end of Order Entry, for terminals that will normally be using the same Service Type, order after order. If the default service type is utilized, the default service type will be selected automatically for all new tickets. The user can then simply touch Finish to complete the order. Of course, the user can always change the service type for any ticket, simply by touching another service type selection, for the odd ticket that may be processed for a service type other than the default service type.

If you do wish to use the default service type feature, highlight the Default Service Type line item, then touch the service type you wish to use. If you do not wish to use a default service type, select "None".

##### 2) Default Customer Window

The Customer Information Screen described in section 1.85 includes 3 different Customer Information Windows. You may use the Default Customer Window feature to cause one of these windows to appear automatically each time a customer record is retrieved.

For example, you may wish to see the Previous Orders window for each customer automatically as soon as the Customer Information screen is seen. To set up your terminal to do this, highlight the Default Customer Window line item on the Terminal Configuration Screen and touch the Tickets option. The Default Customer Windows options available are as follows:

<u>Default Customer Window</u>	<u>Selects:</u>
None	None
Previous Orders	Tickets
More Info	Comments
Customer Totals	Points

Note that if a particular customer record has been set up with a priority comment [See section 1.85, C, 2] then the More Info / Comments window will always appear for that customer, over-riding the Default Customer Window.

##### 3) Automatic Street Search

The Customer Information screen includes a Street Address Look Up feature, which matches a customer's street address with a street database for selecting delivery areas, delivery charges, etc. This feature is described in section 1.85 F.

Any terminal can be configured to perform the Street Search automatically, which allows the user to verify each customer's delivery area information as soon as the customer information screen is loaded on that terminal. This will allow you to use a pre-loaded customer database in conjunction with a customized street database and pre-determined delivery charges by area. See section 3.50 for more information on setting up the Street Database and Delivery Areas.

To turn on Automatic Street Search, touch the Automatic Street Search line on the Terminal Configuration screen, and then touch ON. Touch OFF to disable this feature.

### **3.10 Terminal (cont)**

#### **A. Terminal Configuration (cont)**

##### **4) Counter Service**

The Counter Service feature is designed for operations that need to cash out each ticket as it is ordered. Any terminal can be set to run in Counter Service mode, with is essentially an “express” mode that eliminates a few keystrokes.

When taking an Order in Counter Service Mode, the Print & Cash Out button will be activated as soon as a Service Type is selected. When used in conjunction with the Default Service Type, the order taker will be taken to the cash out screen as soon as the Smart Check ticket is finished, since the service type is selected automatically. Once the ticket is cashed out, the Order Taker is returned to the Order Entry Screen for the next order.

To enable the Counter Service Mode of operation, touch the Counter Service line on the Terminal Configuration screen, and select ON. To disable this feature, select OFF. Counter Service will only operate for those service types that are checked for counter service [See section 3.25 A for more information on setting up service types.]

##### **5) Cash Drawer 1**

DiamondTouch will operate with up to two (2) physical cash drawers per terminal. Cash Drawers can be serial, or work with a local serial or a local parallel printer. DiamondTouch supports both Epson and Star format Cash Drawers. DiamondTouch can also track Cash Register transactions without a cash drawer at all - with a “Virtual” cash drawer, if you will.

To use the Cash Out functions on a terminal, you must first set up a Cash Drawer for that terminal. To enable Cash Drawer 1, touch the Cash Drawer 1 line on the Terminal Configuration screen. Select the port that your cash drawer is connected to by touching the port name on the right side of the screen (Com1, LPT1, etc). If you do not have a physical cash drawer connected to your terminal, but you still wish to use the Cash Out functions, select No Port. If you want to disable the Cash Drawer on this terminal, select Off.

##### **6) Cash Drawer 2**

Cash Drawer 2 works the same way as Cash Drawer 1. If you are operating with more than 1 Cash Drawer, you may set Cash Drawer2 by touching the Cash Drawer2 line on the Terminal Configuration screen and selecting the port, no port or off if you do not wish to use the 2<sup>nd</sup> Cash Drawer feature.

##### **7) Print Register Receipts**

When a ticket is cashed out, a receipt will print automatically if you have set your terminal up to print register receipts. See section 1.35 for more information on cashing out tickets.

To set your terminal up to print register receipts, select the Print Register Receipts line on the Terminal Configuration screen and select Yes. If do not wish to print receipts, touch No.

### 3.10 Terminal (cont)

#### A. Terminal Configuration (cont)

##### 8) Customer Display

DiamondTouch supports the EMAX format optional customer pole display, for displaying greeting messages, amount due and change to the customer when taking orders across the counter. Pole displays can be configured for any terminal in your system, and can generally share a communications port with a serial printer and a cash drawer.

To set up your customer display, touch the Customer Display line on the Terminal Configuration screen. Select the port that your display is connected to, and enter the top and bottom greeting messages in the text boxes provided. Your greeting messages will be displayed when your terminal is first turned on, and after cash out transactions have been completed.

To turn off the pole display feature, touch the Customer Display line on the Terminal Configuration screen, then select OFF.

##### 9) Ticket Messages

The Smart Check user interface can display animated messages to your Order Takers while the order is being processed. These messages can be used for suggestive selling, or simply to remind your order takers to thank the customer for each order.

To setup ticket messages for a terminal, touch the Ticket Messages display line on the Terminal Set Up screen. Select ON to turn this feature on, and enter the blinking and scrolling messages you wish to display in the text entry boxes provided. The messages will be displayed automatically whenever the order taker pauses during the order taking process.

To turn the feature off, select off.

##### 10) Screen Saver

The DiamondTouch screen saver is used to increase monitor life, and enhance system security by forcing users to sign on to the system. The screen saver has three modes of operation:

OFF	Screen Saver can only be enabled by touching the Diamond logo on the Main Menu.
Main Only	Screen Saver will turn on automatically from the Main Screen only, if no activity takes place within the amount of seconds specified in the Time Out field.
All Screens	Screen Saver will turn on automatically from any screen if no activity takes place within the amount of seconds specified in the Time Out field.

Use the left and right scroll arrows to specify the amount of seconds before the screen saver times out, following no activity.

### 3.10 Terminal (cont)

#### B. Utilities

The Utilities screen is generally used by factory service personnel only, to access various functions within your system. There are 2 features that are designed for user access.

##### 1) Initialize PLU Table

The PLU Table is used by the Food Inventory interface to assign meaningful inventory numbers to all items ordered. The PLU table is designed to be perpetual - that is, if you change the contents of Menu Category 3, Item 7 from Blueberry Muffins to a Scotch & Soda, the PLU number for Blueberry Muffins will remain untouched, and a new PLU number will be assigned to the Scotch & Soda. This is done to insure that the historical reporting of your inventory system can keep up with the dynamic requirements of your Order Entry menu.

If you wish to automatically re-assign numbers to your PLU Table, essentially “starting from scratch” with PLU # 1, then touch the Initialize PLU Table. It is recommended that this only be done after closing the day, to insure that PLU items remain consistent throughout the business day.

If you are not using the optional Food Inventory package, you may disregard this feature entirely.

##### 2) Reinitialize Ticket Tracker Database

The ticket tracker database is used by DiamondTouch to “remember” all previous orders for all customers [See section 1.85, C]. Following a system upgrade from version 2.71 or earlier, it is required that this database be re-initialized before using DiamondTouch. When the re-initialization is complete, a message box will appear detailing the number of files, tickets, etc that were found.

#### C. Network Settings

The information in Network Settings is used by DiamondTouch to “find” the Server and Terminal Paths. It is also used to identify the terminal number used to interact with the rest of the system. These settings are set at the factory and, generally, should not be changed.

The Network Path can be the driver letter and directory name (example: “E:\Diamond98\”) mapped to the system, or the Network Path can be the actual server network name ( example “\\Server\Diamond98\”). The second example is generally more reliable, since mapped driver letters can sometimes be “lost” by the operating system.

The terminal path is the location of the Diamond98 program on the local terminal (example: “C:\Diamond98\”).

A terminal number, starting with terminal 1 must also identify all terminals. If this number is not set, the system will not operate properly. Note that the terminal number is used for Cash Drawers, among other features. If 2 terminals with cash drawers use the same terminal number, then the totals of the 2 drawers will be combined. Other conflicts will also result, so be sure to set terminals with unique identifiers.

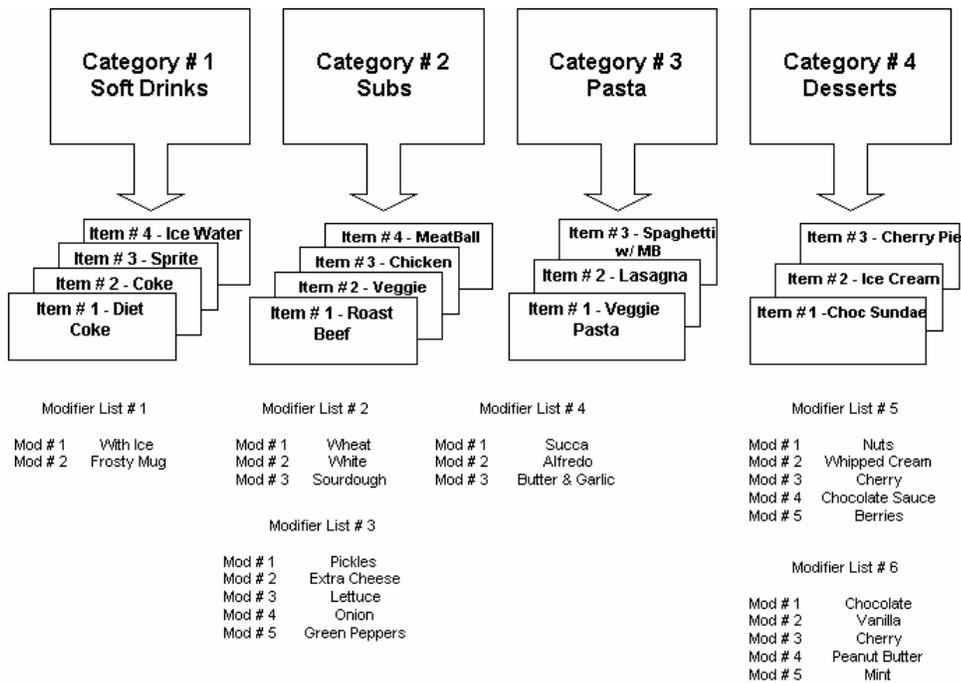
The store name setting is optional.

### 3.15 Menu Set Up

The Order Entry Menu Selection Control Window displays graphical menu items from which the user builds a ticket [See section 1.20 B]. The choices that appear and the sequence in which they appear are set up in the Menu Set Up screens. This section details the various features available.

There are a total of 40 Menu Categories available in the DiamondTouch Menu. Each Menu Category can contain up to 40 Menu Items, for a total of 1600 Menu Items. Each of the 1600 menu items can also utilize up to 10 modifier lists, each of which can contain 40 modifiers, for a total of 400 possible modifiers for each of the 1600 Items. Finally, each Menu Item can also use an “Includes List” containing up to 16 normally included, or not included, ingredients. Any single modifier list or Includes list can be used for as many items in as many categories as desired.

An overview of a sample menu is shown below.



In the above diagram, Modifier List # 5 could be used by the Chocolate Sundae Item to force the order taker to select toppings. Modifier list 6 could be used for Item # 2, Ice Cream, but could also be used by the Choc Sundae to select the flavor of the Ice Cream used. Modifier list # 6 could be forced on the order taker for the Iced Cream, but might be set up as optional for the sundae. Modifier lists can also contain pricing modifications to the menu item, or contain the full price for the Item. It’s all in how you wish to set your menu up.

Once you fully understand the principles involved in setting up the menu, and all of the additional features and functions available such as required and optional modifiers, pricing by topping, etc., just a little advance planning will greatly simplify the task of setting up your Order Entry System.

### 3.15 Menu Set Up (cont)

#### A. Category

To make Order Entry more convenient, Menu Items are divided into Categories. There are a total of 40 Menu Categories available in the DiamondTouch Menu. To set up your Menu Categories, from the main menu select Set up, touch Menu and then touch Category.



The category screen allows you to enter a category name, select a graphic from the DiamondTouch Bitmap Library, set PLU thresholds for optional inventory management, and set more advanced features. The category screen is also the “gateway” to the Menu Items Set Up screen for each category.

Typing in a new name in the Name text entry box can change the Category name. To change the picture, touch the square control button and the bitmap library will appear. Touch the picture you wish to use, and the new picture will be displayed on the sample control. The left and right arrow keys are used to scroll through the Menu Categories, and to return to the first or last category. For most menus, this may be all you need to set up each of your Categories: a Name and a Picture.

**Save** - Touch this control button to save your changes at any time.

**Insert** - Touch this control button to insert a blank category. Categories are displayed on the Order Entry Menu Section Control Window, left to right, in the order that they are set up. If you wish to add a category of drinks, and you wish to have it displayed next to the appetizers, you can use the insert control to place the category where you want it, without editing all of your other menu categories. Note that the last category, category # 40, will be deleted if you insert a category.

**Delete** - Delete will not only erase the existing category, but it will also move all subsequent categories down one number to fill the empty slot. If you simply wish to display a blank Category without moving all of your subsequent categories, just erase the Category name, and the category will effectively be invisible on the Order Entry screen.

**Finished** - When you are finished, touch this control to return to the Set Up Menu.

**3.15 Menu Set Up (cont)**

**A. Category (cont)**

**1) Advanced - Allow Manual Skip of Required Modifiers**

To fully understand this feature, a discussion of what required modifiers are and how they work might be helpful. When a Menu Item utilizes a “Required” modifier list, the modifiers will appear automatically once the order taker selects the Menu Item. The user will be “forced” to select a required number of modifiers before continuing with the order. These choices could be the type of bread to use on a sandwich, cooking instructions such as rare/medium/well done, the type of dressing on a salad, etc. Once the required choices have been satisfied, the order taker may then be taken to a subsequent modifier list, and again be forced to select a required number of modifiers, and so on, until the item order has been completed. These types of applications are straight forward, and will not require the use of the “Manual Skip” feature discussed in this section.

Some other modifier lists may have been set up with required amounts purely for pricing purposes. Pizza toppings are a good example. Some pizza menus charge less for each topping as the pizza is built. After 8 or 9 toppings, additional toppings might even be no charge at all. {NOTE: Another way to handle this type of pricing is with the Price by Topping feature, discussed in section 3.15 B. Price By Topping cannot be used for all menus, however.} One way to address this type of pricing structure is with multiple, incrementally priced modifier lists that are identical in every way except for price. Consider the following example for a Medium Pizza, which has a base price of 5.00:

<b>Mod List # 1</b>		<b>Mod List # 2</b>		<b>Mod List # 3</b>		<b>Mod List # 4</b>	
Required = 1		Required = 2		Required = 2		Required = 0	
Pepperoni	1.00	Pepperoni	.75	Pepperoni	.50	Pepperoni	.00
Xtra Cheese	1.00	Xtra Cheese	.75	Xtra Cheese	.50	Xtra Cheese	.00
Onions	1.00	Onions	.75	Onions	.50	Onion	.00
Green Pepr	1.00	Green Pepr	.75	Green Pepr	.50	Green Pepr	.00
Anchovies	1.00	Anchovies	.75	Anchovies	.50	Anchovies	.00
Xtra Cheese	1.00	Xtra Cheese	.75	Xtra Cheese	.50	Xtra Cheese	.00

Note the required amount under each modifier list. In the above example, a Pizza ordered with any one topping will be 6.00. (The 5.00 base Medium Pizza price plus the one (1) topping from Modifier List # 1 at 1.00 each = 6.00)

Before the 2<sup>nd</sup> topping is ordered, the active modifier list will switch from list #1 to list #2 automatically, because the required=1 topping has been satisfied for list # 1. The order taker will notice no change on the Menu Selection, other than that the 2<sup>nd</sup> and 3<sup>rd</sup> toppings are .75 each instead of 1.00 each. Once the 3<sup>rd</sup> topping is ordered, the required amount for list #1 and list #2 have been satisfied, so the list will switch to Mod List # 3 for the next 2 toppings. All toppings after the first 5 will be no charge, because the menu section control window will be displaying choices for list # 4. The maximum Medium Pizza price is as follows:

Base Price		5.00
Mod List # 1 - 1 Req'd Topping	@ 1.00/ea =	1.00
Mod List # 2 - 2 Req'd Toppings	@ .75/ea =	1.50
Mod List # 3 - 2 Req'd Toppings	@ .50/ea =	1.00
Maximum Price for the above sample item	=	<u>8.50</u>

### 3.15 Menu Set Up (cont)

#### A. Category (cont)

##### 1) Advanced - Allow Manual Skip of Required Modifiers (cont)

The method in the above example works very well, and provides a great deal of control over modifier pricing, especially since you can define ½ pricing levels for individual modifiers. There is only one problem. What if the customer orders a Thin Crust Style AFTER all of the toppings have been ordered? If the customer has only ordered 3 toppings, then the order taker is looking at modifier list # 3 which is another list of toppings.

You can provide for this scenario by adding what is called an “optional” modifier list to the item for crust style and/or cooking instructions. To allow the order taker to “Skip” through the rest of the required modifier lists, check the “Allow Manual Skip of Required Modifiers” check box in the Category Set Up Window. This will allow the Order Taker to touch the Modifier command button on the Order Entry screen and bypass all required lists to get to the first list of non-required modifiers. The order taker will then be able to browse through all non-required lists for the item by touching the Modifier control again until he sees the crust selections. The order taker can then touch “Thin Crust” and continue with the order without missing a beat.

This feature probably won’t be used for most of your Menu Categories. However, if you can gain an understanding of how this feature works in conjunction with the other features available in the menu, then you can maximize the capabilities of the DiamondTouch Order Entry system to your best advantage.

##### 2) Advanced - Sort Modifiers

This feature is used for operations that always wish to print modifiers in the same order on the tickets, no matter what the sequence the order taker used to create the order. This is particularly useful for a high volume Sandwich Make Line, where the ingredients sequence has to match the order of the food bins on the table. For example, let’s say the modifier list for a standard sub sandwich calls for the following sequence:

Lettuce  
Onion  
Tomato  
Green Peppers  
Black Olives  
Jalepeno Peppers

The bins have been placed in the above sequence, but the customer orders the sandwich as follows:

Jalepeno Peppers  
Onion  
Green Peppers and  
Lettuce.

Without an automatic sort, the lettuce at the end or the Jalepeno at the top might not get picked up by the make station. By checking the Sort Modifiers checkbox, all items ordered within the Category will automatically sort the modifiers in the sequence that the list was programmed, and the ticket will be printed with the lettuce at the top, and the Jalepeno at the bottom. Note that this feature will only sort modifiers within a list. If a 2<sup>nd</sup> modifier list is used, then those modifiers will also be sorted, but they will not be “merged” with the previous list.

### 3.15 Menu Set Up (cont)

#### A. Category (cont)

##### 3) Advanced - Item 1 Account #

For optional “back-office” reporting purposes, account numbers are used to report revenues and expenses. DiamondTouch allows you to assign each menu item a unique account number; however, most accounting systems might only use a few account numbers to report all sales. To save time when setting up your menu, you can assign a single account number on the category screen, and then touch the Copy to All Items control to send that number to all items within the category.

##### 4) Advanced - Group

In addition to reporting by Category, some users may wish to report sales by Groups of Categories. To change the group field, touch the group text entry box and enter the new group number. You may assign any number to this field from 1-127.

##### 5) Advanced - Picture Filename

The path used to locate the picture for the Category is listed in this box. This name is generated automatically when you select a new bitmap by touching the square sample control on the Category screen. Generally, this field should not be edited without assistance from your Rockland Technology Sales or Service Representative.

##### 6) Show PLU

PLU numbers are used to report theoretical ingredient usage to an optional inventory reporting package. If you are not using inventory, then you do not need to read this section. To access the PLU Receipt Level screen from the Category Set Up screen, touch the Show PLU control.

Recipe Level	Min	Max
Recipe Level 1	0	2
Recipe Level 2	3	5
Recipe Level 3	6	8
Recipe Level 4	9	+

Recipe levels are set by touching the recipe level, then adjusting the scroll bar to set the maximum amount. You should always set Recipe Level 1 first, then recipe level 2, etc. Recipe level 4 is set automatically.

### 3.15 Menu Set Up (cont)

#### A. Category (cont)

##### 6) Show PLU (cont)

Optional Inventory reporting uses the items and modifiers ordered on tickets to calculate a “theoretical” usage of ingredients. These are then compared against an “actual” ingredients used table, which is calculated by subtracting an ending physical inventory from a starting physical inventory. In general, determining the theoretical usage is a straight forward process for your inventory program: it just compares items used against a recipe table you have set up in your inventory program, and it does the math. If a New York Strip Steak was ordered with a Baked Potato, it will subtract 1 strip steak and 1 baked potato from inventory.

For some menus, however, recipes can change dynamically for an item when the number of modifiers changes. This is particularly true for a Pizza, where a Medium Cheese pizza with just pepperoni might call for 24 slices of pepperoni, and the same Medium Cheese Pizza with pepperoni, onion, peppers, mushrooms, extra cheese, black olives, sausage and meatball might only use 12 slices of pepperoni - only half as much for the same topping on the same item. In this situation, a standard menu look up table will never report ingredients properly.

To solve this problem, you can set up DiamondTouch to indicate to your inventory system where the “thresholds” are for your recipe changes within a Category. DiamondTouch will then automatically assign different PLU’s for reporting the usage of identical modifiers within each threshold grouping. The actual recipe quantity is still set up in your inventory package, but we can cause the reporting totals to “point” to the appropriate recipe automatically by setting up these PLU thresholds.

For example, let’s say you have set up your Recipe for Medium Pizza as follows:

Ingredient	0 - 2 toppings	3-5 toppings	6-8 toppings	9 + toppings
Pepperoni	24 Slices	20 Slices	12 slices	10 slices
Black Olives	4 scoops	3 scoops	2 scoops	1 scoop
Onions	12 slices	10 slices	8 slices	6 slices
Extra Cheese	8 oz	7 oz	6 oz	5 oz
Meatballs	24 oz	18 oz	12 oz	8 oz

The ingredients, measures and quantities are handled by the inventory system. What is important for DiamondTouch is the amount of toppings at the top of the chart. These are used when compiling the inventory report to indicate, for example:

```

12 Medium Pizzas were ordered with 0-2 toppings
9 Medium Pizzas ordered with 6-8 toppings
1 of the Medium Pizzas with 0-2 toppings had Pepperoni      ( 24 slices)
9 of the Medium Pizzas ordered with 6-8 toppings had Pepperoni (108 slices)

```

The inventory system is thereby able to accurately report that 132 slices of pepperoni should have been used. Had the system simply used 24 slices for all medium pizzas, then the inventory system would have reported a total of 10 pizzas used 24 slices each, for 240 total, almost doubling the actual amount used.

Note that recipe *levels* are set for a category, but actual ingredient amounts are set by your inventory system. Therefore, as long as the *levels* are the same for small, medium, large pizzas, your inventory system will be able to calculate ingredients accurately.

### 3.15 Menu Set Up (cont)

#### B. Items

Once you have set up your categories, the actual menu items can be entered into the system. To access the Item set up screen, first select the category from the Category set up screen, then touch the Go To Menu Items button beneath the left and right navigational arrows. [NOTE: If you do not see the Menu Item control, touch Hide Advanced or Hide PLU].

The screenshot shows the 'Menu Item Set Up' screen. The main area is dark red. On the left, 'Category Number 1' is displayed. Below it, the 'Name' field contains 'Appetizer'. To the right of the name is a square button with a picture of a 'W' logo and the word 'Appetizer' below it. Below the name field are 'Hide Advanced' and 'Show PLU' buttons. In the center, there are four navigation arrows: a double arrow pointing left, a single arrow pointing left, a single arrow pointing right, and a double arrow pointing right. On the right, there is an 'Advanced Features' section with several checkboxes: 'Allow Manual Skip of Required Modifiers' (checked), 'Sort Modifiers', 'Enable Make Line Monitor', 'Force Suggestive Selling', 'Enable Items Default to Page 2', and 'Over-Ride Tax Exempt by Service Type'. Below these are fields for 'Account #' (0), 'Group #' (0), and 'Picture' (PICTURES\CHKWHOT.BMI). At the bottom, there are four buttons: 'Save', 'Insert', 'Delete', and 'Finished'.

Initially, the Menu Item set up screen looks very similar to the Category Set Up screen. The name and the square picture selection button, the navigation arrows and the Save, Insert and Delete controls all work the same as the Category screen described in Section A, above.

In addition to setting up a name for the button, however, you can also set up a different name for the description that appears on the ticket. Depending on the number of capital letters used, you are generally limited to 10 - 12 characters as captions to the pictures on the buttons, but you can print up to 20 characters on tickets.

The price field is also provided to enter a base price for the item. As was the case for the Category Set Up screen, for many menus, this is all the information you need to set up a simple menu. Of course, there are many additional features available. These are discussed in the following sections.

### 3.15 Menu Set Up (cont)

#### B. Items (cont)

##### Advanced Features

To view the Advanced Features touch the Advanced button on the left side of the screen. The features will appear on the right of the screen.

**Allow Manual Skip of Required Modifiers** – allows you to override a required modifier.

**Sort Modifiers** – allows you to sort the modifiers in the order in which they were ordered.

**Enable Make line Monitor** – enables the item with a check in the designated box to appear on a make line monitor.

**Force Suggestive Selling** –feature forces the order taker to ask if the customer needs to order anything else from the menu. **Note:** To set up this feature go to the main menu, touch Set Up, select Terminal and then touch Terminal Configuration.

**Enable Items Default Page 2** – once a category has been selected, the screen will automatically go to page 2 of the Item List.

**Override Tax Exempt by Service Type** – allows you to manually select a category to make tax exempt by service type.

#### 1) Show Modifiers

Modifiers are additional enhancements, descriptions, food toppings or even cooking instructions that need to be available to the order taker to accurately describe the item being ordered. Modifiers generally appear automatically during the order taking process, and the Order Taker selects them in a sequence pre-defined by the menu designer on the Show Modifiers screen. [NOTE: The Modifier Lists themselves are designed in the Modifier Set Up, described in the following Section 3.15 C.] To set up the modifiers for a menu item, touch the Show Modifiers button on the Menu Item Set Up screen.

Mod #	Name	Req'd	Optl	NO Inv	NO PBT
20	Spaghetti Toppings	0			
0		0			
0		0			
0		0			
0		0			
0		0			
0		0			
0		0			
0		0			
0		0			

As shown on the above screen, there are 10 rows on the Show Modifiers window, one for each of the 10 possible modifier lists for the selected item. (For most items, 1 or 2 modifier lists will be sufficient.) Each modifier list has a number, and an optional name. To attach a modifier list to an item, touch the desired modifier row to access the modifier list selection window, shown below:

### 3.15 Menu Set Up (cont)

#### 1) Show Modifiers (cont)

The small scroll bar on the upper left portion of the screen allows you to browse through the available modifier lists. The large window below the scroll bar that lists the individual modifiers within each list is for information only. This can assist the menu designer in making sure that the right list is being selected. To select a list, highlight the list in the upper scroll bar and touch Select. The first selection at the top of the modifier list is a NO Modifier selection - use this to reset the modifier to 0. If you wish to close the Modifier List selection window without making a selection, touch Cancel.

After selecting the modifier list, you can set various properties of the modifier list. These are discussed below:

#### **Req'd**

Setting any required amount other than 0 will force the order taker to select a minimum required amount of modifiers before the modifier selection window displays the next set of choices. For example, with a Sub Sandwich, you may want to force the selection of white, wheat, rye, sourdough or pumpernickel bread. You would first go to the modifier set up screen [See section 3.15 C that follows] and set up a new modifier list called Sandwich Breads. Next, attach the Sandwich Breads modifier list to each sub sandwich item, as shown in the previous section, and set the Required box to 1. This will force the order taker to select just 1 type of bread before moving on with the order. Another list could be set up for type of cheese, toasted/not toasted, etc. NOTE: Keep in mind that every required list adds a touch to the order entry process, so you only want to force required choices that are common to all orders.

#### **Opt'l**

An optional modifier list will not appear automatically. It will be available to an order taker once the item is ordered, by touching the modifier control. This can be very useful if you have special options for menu items that are not ordered by all customers.

For example, let's say you have some menu modifier options for soft drinks like "No Ice" or "With Lemon". Most orders do not require that the order taker select these options, so you do not want to slow down the process by displaying modifier lists for every drink ordered. Your order taker could then enter drinks by select the Drinks category, touching Coke, Orange, Coffee, and Water. To modify the Water menu item, the order taker would then touch the Modifier control to bring up the optional modifier list for Water, and could then select No Ice and With Lemon.

#### **NO Inv**

Checking the No Inventory box means you do not want to count this modifier list for purposes of tracking PLU inventory items. This option is only important if you are using the optional inventory package. As an example, cooking instructions should probably not be counted when determining how many ingredients were ordered on a Pizza.

#### **NO PBT**

If you are using the Price by Topping feature discussed below, this checkbox is useful if you do not want the toppings from this modifier list to be counted when pricing an item by number of modifiers added to it. Again, cooking instructions should not be counted if the item is a pizza and you are calculating the price by counting toppings.

### 3.15 Menu Set Up (cont)

#### 2) Advanced Features

To view Advanced Features, touch the Show Advanced control on the Menu Item set up screen. Advanced Features provides access to additional menu set up capabilities. These features are discussed in the sections that follow.

The screenshot shows the 'Advanced Features' window for a menu item named 'Pasta Supremo'. The window is divided into two main sections. The left section contains fields for 'Category # 3 = Spaghetti', 'Item # 1', 'Name on Tickets', 'Name on Button', and 'Price' (8.79). There are also 'Hide Advanced' and 'Show Modifiers' buttons. The right section contains various options: 'Show Includes' (000), 'Show Taxes' (7.25%), 'Price By Topping' (OFF), 'Allow Item Exchange' (checked), 'Misc Price Item' (unchecked), 'Long Ticket Name On Button' (unchecked), 'Lock PLU' (000256), and 'Account #' (0). At the bottom, there are navigation arrows and a 'Picture FileName' field with the value 'PICTURES\SPAG\_TS.BM'. A bottom bar contains 'Save', 'Insert', 'Delete', and 'Finished' buttons.

#### Show Includes

To access the Includes list for a menu item, touch Show Includes on the Menu Item Advanced Features window. Includes lists are used to display normal ingredients included with a menu item, and some common substitutions that do not affect the menu price. Includes lists will appear automatically during order entry as soon as the item is selected by the Order Taker.

The screenshot shows the 'Show Includes' window for a menu item in the 'Breakfast' category. It features a list of ingredients with checkboxes for their inclusion status. The 'Includes List # 0001' is selected. The list includes: 2 Eggs (checked), French Toast (checked), Potatoes (checked), Toast (checked), English Muffin (unchecked), Bagel (unchecked), and two empty rows. A 'Finished' button is at the bottom right.

Item	Included	Included
2 Eggs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
French Toast	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Potatoes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Toast	<input checked="" type="checkbox"/>	<input type="checkbox"/>
English Muffin	<input type="checkbox"/>	<input type="checkbox"/>
Bagel	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

If the selection is normally included, touch the Included check box; if the item is not normally included, leave the box unchecked. Unchecked items will appear during the order entry process with a "No" preceding the name of the item.

New Includes Lists can be defined by scrolling to the bottom of the available includes lists and selecting NEW List. You may then enter all of the included items and select the included status for each Include. Once a list is saved, it can be re-used for as many items as necessary.

If do not wish to use an included list for an item, select 00 NONE. When you have completed the Includes List, touch Finished. The number of the Includes list you have selected will appear in the display box next to the Show Includes control on the Menu Item Setup Advanced Features window.

### 3.15 Menu Set Up (cont)

#### B. Items (cont)

##### Show Taxes

To set up a tax rate for a menu item, touch the Show Taxes control on the Menu Item Advanced features set up window. A selection box with up to 10 different tax rates will appear. Select the tax rate you wish to use, and then touch Hide Taxes to close the tax rate selection window. See section 3.15 D for more information on setting up your tax rate schedules.

Note that all items will default to tax rate # 1, unless you specify an alternate table. It is therefore not necessary to select a tax rate for every item as it is created, unless you need to specify a tax rate other than Tax Rate # 1.

##### Price By Topping

Price by Topping provides an alternate way to price items that are priced according to the number of modifiers that are added to the items. This feature is particularly useful for operations that offer a “build your own” type of pizza on the menu. The item price will be calculated according to a table that the menu designer sets up, which simply assigns a price to the item based on the quantity of modifiers added.

To access the Price By Topping set up window, touch the Price By Toppings control on the Menu Item Set Up Advanced Features window.

QTY	Price
0	5.50
1	6.00
2	6.35
3	6.70
4	7.00
5	7.25
6	7.45
7	7.60
8	7.70
9	7.80
10	7.90
11	8.00
12	8.00
13	8.00
14	8.00
15	8.00

Price by Topping will only work if the Enable Price By Topping check box is checked. Fill in the price structure for the item in the pricing matrix on the left of the screen. To fill in all prices below a “maximum” set price, highlight the maximum price and touch the fill control. If the modifier list you are using contains some “gourmet” toppings that are priced higher than a standard topping, you may wish to check the Count 0.00 Price Toppings only check box. This will cause the system to skip the priced modifier when counting the toppings, so the customer won’t pay twice for the priced gourmet topping.

Half toppings are always rounded up to the next highest whole when counting  $\frac{1}{2}$  toppings. For example, a pizza with half mushroom and pepperoni, and half extra cheese, would normally be considered a  $1\frac{1}{2}$  topping pizza, and would be rounded up to the 2 topping price. Before rounding, however, there are some alternate ways of counting half toppings. Consider a Pizza with Mushrooms, Pepperoni and Onions on  $\frac{1}{2}$  and meatball only on the 2<sup>nd</sup> half. There are 3 ways to count these toppings:

<b>Count as Half Topping:</b>	4 ½ toppings =	2 Full Toppings.	Price = 6.35
<b>Count as Whole Topping:</b>	3 plus 1 =	4 Full Toppings.	Price = 7.00
<b>Count Highest Half Only:</b>	3 on 1 <sup>st</sup> half =	3 Full Toppings	Price = 6.70

Once Price by Topping is enabled, the window next to the Price By Topping control on the Menu Item Advanced Set Up window will read ON. You can also disable certain modifier lists from being counted at all when calculating the number of toppings by checking the NO PBT check box on the modifier list set up window. See section 3.15 B,1 for more information on NO PBT.

### **Allow Item Exchange**

The Smart Check user interface allows for automatic item replacement during edit of a ticket. [See section 1.20 F] Before items can be replaced automatically, however, they must be designated by the menu designer as interchangeable with other selected items within the same category. This is done by checking the Allow Item Exchange check box in the Menu Item Advanced Features set up window.

Before checking the Allow Item Exchange box, you should make sure that all includes, modifier lists and other relevant information is truly interchangeable. Otherwise, some unpredictable things could happen.

For example, consider a drinks Category both with Coke, Orange Juice, Water and Coffee. Let's say that a guest has ordered a coffee with cream and sugar, which are modifiers attached to the coffee item. If you check allow item exchange for all drinks, then an order taker would be able to touch the coffee on the smart check interface, and swap it with the Orange Juice. The customer might then end up with an Orange Juice with Cream and Sugar, (or a coffee with a shot of vodka!) if that was the modifier occupying the same slot on your modifier list.

When an item is exchanged automatically on the Smart Check interface, all modifiers are also exchanged with those occupying the same relative position on the list. If an item is ordered with a selection made of the 3<sup>rd</sup>, 5<sup>th</sup> and 9<sup>th</sup> modifiers on the first list and the 8<sup>th</sup> modifier on the 2<sup>nd</sup> list, then those same modifier positions will be read for the replacement item and those modifiers will appear on the ticket. Therefore, the makeup of the lists should be identical in terms of number of modifier lists, and number of modifiers in each list.

Of course, if there are no modifier lists for all items within a category, then they are certainly good candidates for the Allow Item Exchange feature.

### **Long Ticket Name on Button**

As mentioned earlier, the ticket description for an item is 20 characters long, whereas the caption designed for the button itself is on about 11 characters long; this is because the picture on the button does most of the work for fast identification of the selection.

There are some situations, however, where a more descriptive text description is more appropriate - specialty coupons are one example. If a longer description is absolutely required, you can select the Long Ticket Name on Button option. This will cause the description you have entered for the ticket to appear on the button during order entry - the wording will wrap on the button. Because the word wrap will cause the letters to appear a bit higher on the button, use of any graphical cues may obscure the text description - therefore you may wish to select a very simple graphic or no graphic at all for this option.

Keep in mind that text only buttons will slow down your order taker - graphical cues can be located much faster than reading through a series of buttons. This feature should therefore be used very sparingly, if at all.

### 3.15 Menu Set Up (cont)

#### B. Items (cont)

##### 2) Advanced Features (cont)

###### **Lock PLU**

This feature is only used in conjunction with the optional inventory program. To support an optional inventory interface, DiamondTouch keeps track of a series of PLU numbers. These numbers are used by the inventory program to link to a recipe database. To maintain historical integrity of the PLU numbers, DiamondTouch will automatically assign a new PLU number to an item if it sees that the menu designer has changed the item description. If you wish to prevent DiamondTouch from assigning a new PLU number to an item, check the LOCK PLU checkbox before editing the item description.

###### **Misc Price Item**

Some items may not have constant prices from day to day, or even from ticket to ticket. The Daily Lunch Special, or the Catch of the Day might be two examples.

A miscellaneous price item will always prompt the order taker for a price each time the item is ordered. The order taker can then manually enter a price. When an item is checked for miscellaneous price, then the price amount keyed in by the menu designer in the Price edit box becomes the maximum price allowable.

###### **Account Number**

For optional “back-office” reporting purposes, account numbers are used to report revenues and expenses. DiamondTouch allows you to assign each menu item a unique account number; however, most accounting systems might only use a few account numbers to report all sales. To save time when setting up your menu, you can assign a single account number on the category screen, and then touch the Copy to All Items control to send that number to all items within the category.

###### **Picture Filename**

The path used to locate the picture for the Item is listed in this box. This name is generated automatically when you select a new bitmap by touching the square sample control on the Item Set Up screen. Generally, this field should not be edited without assistance from your Rockland Technology Sales or Service Representative.

### 3.15 Menu Set Up (cont)

#### C. Modifiers

Menu Modifiers are used to add ingredients, cooking instructions, sides, and a variety of information to a Menu Item on a ticket. A modifier could be an order of cream for a large coffee, or an order of french fries or a coke with a cheeseburger. Modifiers can be used for just about anything you need to fully describe an item ordered by a customer.

This section describes how to set up a modifier list. For more information on how to link a modifier list to an item, and many other features available for controlling how modifiers will work, see section 3.15 B. To access the modifier set up screen from the main menu, touch Set Up, select Menu and then Modifiers.

The modifier set up screen will always begin at Modifier List # 1, Modifier # 1. There are a total of 40 Modifiers available for each list; you may program up to 320 total modifiers lists, although most restaurants can complete their entire menu with 15 - 30 lists, at the most. Once a list has been created, it can be attached to multiple items. You do not need to create a list of steak dinner sides for every steak on your menu. The baked potato, rice, steak fries and curly fries choices you set up for a “Potato Sides” modifier list could probably be used for not only every steak dinner, but perhaps many of your other entrees as well.

Most of the settings on the modifier list are self evident; the Name on Ticket, Name on Button and Price fields work the same as the Item Set Up screen described in Section 3.15 B. The half price field is for modifiers that might be used on only half of the item, such as a Pizza. This allows the menu designer to charge something other than actual half price for a modifier. The Modifier List Description field is optional, but can become very handy for the menu designer when the modifiers are attached to the Menu Items, or when printing the menu report.

To assign a Picture to a Modifier, touch the square control next to the browse label and select a picture from the Bitmap library that appears. The picture filename is loaded automatically; this field should not be edited manually without assistance from your Rockland technical representative.

### 3.15 Menu Set Up (cont)

#### C. Modifiers (cont)

**Change List** is used to access a different modifier list. Enter the number in the keypad that appears and press next to access another modifier list.

**Add New List** is used to add a blank modifier list. The list number will be assigned automatically using the next available list number.

**Copy List** will copy the existing list to a newly created list. This can be very useful if you are using “required” modifier lists to adjust pricing. [See section 3.15 A].

**Copy Price** will copy the price of the current modifier to all other modifiers in the list.

**Delete List** will erase the modifier list entirely, and allow the modifier list number to be re-used by the next new modifier list created. Be careful not delete a list still being used by an item.

**Lock PLU** is only used in conjunction with the optional inventory program. To support an optional inventory interface, DiamondTouch keeps track of a series of PLU numbers. These numbers are used by the inventory program to link to a recipe database. To maintain historical integrity of the PLU numbers, DiamondTouch will automatically assign a new PLU number to a modifier if it sees that the menu designer has changed the description. If you wish to prevent DiamondTouch from assigning a new PLU number to a modifier, check the LOCK PLU checkbox before editing the modifier description.

When you are finished editing or viewing your modifier lists, touch exit to return to the Set Up menu.

### 3.15 Menu Set Up (cont)

#### D. Tax Rates

DiamondTouch allows for up to 10 different tax rates. Tax Rates are assigned to each Menu Item individually. This section describes how to set up your tax rate schedules. For more information on assigning tax rates to menu items, see section 3.15, B, 2.

To access the tax rate set up screen from the main menu, touch Set Up, select Menu and then Tax Rates.

Enter your tax rates as a decimal number. If your tax rate is 7%, then enter .07 for the tax rate. If your tax rate is 8 ¼ %, then enter .0825.

Number	Value
1:	0.07
2:	0
3:	0
4:	0
5:	0
6:	0
7:	0
8:	0
9:	0
Delivery Charge Tax Rate :	.07

All items will default to Tax Rate 1 as the menu is entered, so this tax rate should always be set with the most common tax rate. If you only use one tax rate, then set that rate to tax rate 1.

The last tax rate is the delivery charge tax rate. If you use delivery charges [See section 3.50 E for more information on setting up delivery areas], then you will need to set the appropriate tax rate for delivery charges in this field. If you set this field to 0, then the delivery charge portion of your tickets will not be taxed.

When you have completed setting up your Tax Rates, press CONTINUE to exit the tax rate set up screen.

## 3.20 Printers

### A. Printers

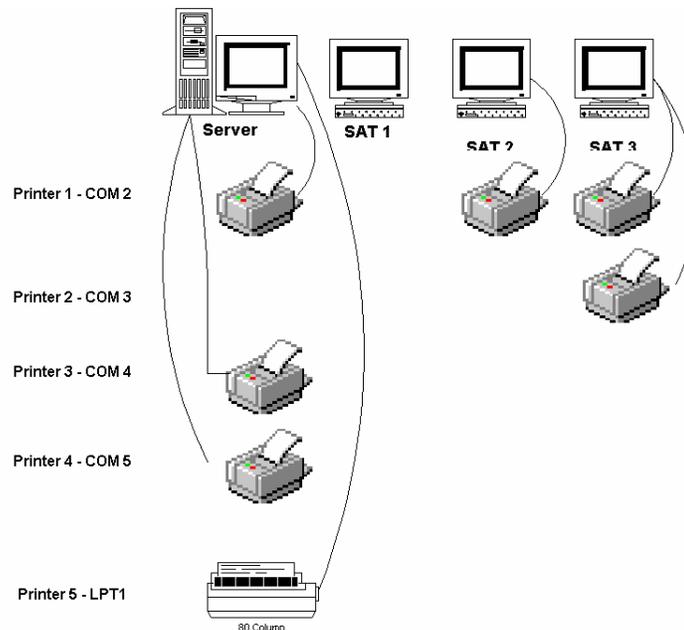
DiamondTouch provides a very powerful array of printer configuration options. Before jumping into your Printer Set Up screen, it would be a good idea to first gain an understanding of how your individual local and system printers have been configured.

**Local printers** are those printers attached to a terminal that are only used by that terminal. A cash drawer printer is a good example of a local printer. Local printers can only print information from the terminal to which they are attached; a terminal cannot print to another terminal's local printer.

**System printers** are those printers that are shared by the entire system, and they are typically attached to the Server station via a Boca Board port expansion card, typically configured to access serial ports 4,5,6,7,8 and 9. Kitchen and Bar printers are examples of system printers. All terminals can print to system printers.

The most single most important concept that must be understood before setting up the system printers is that all printer ports used by the system are defined for the system just once. To put it another way, **all stations operate with the same printer ports list**. Any edits done to the list of printers on any single station will be transferred to all other stations once those stations re-connect to the system.

In the example below, the Server has been configured with a local printer on Com2, a System Printer on Com 4 and another System Printer on COM 5. A local 80-column printer has also been set up on LPT1. Sat 2 has a single local printer on COM2; Sat3 has a local printer on COM2 and another on COM3



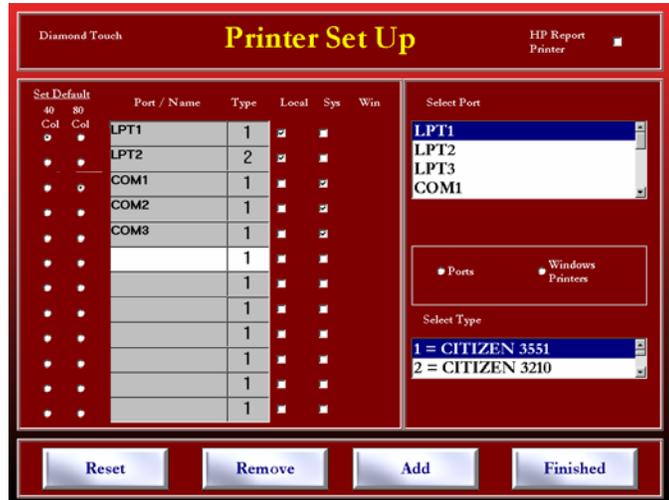
Note that all terminals will be using the same printer list. Printer number 1 will be COM2 on all terminals; it will be checked local for the Server, Sat 2 and Sat 3. Sat 1 does not have a local printer on COM2, so Printer 1 will not be checked local on Sat 1. All stations will have Printer 3 and Printer 4 checked as System printers, since these printers will be available to all terminals.

Before adjusting your printer settings, it is a good idea to sketch out your system diagram as shown above.

### 3.20 Printers (cont)

#### A. Printers (cont)

To access the printer set up screen from the main menu, select Set up, touch System and then Printers.



Although all terminals share the port descriptions, you must still use the printer set up screen to set up the local/system and type printer settings type for each terminal individually.

The above printer set up screen shows the correct settings for the server terminal on the previous page. The Sat 2 terminal on the previous page will be set up almost identically, except that the LPT1 local check box will not be checked. Sat 1 will not have any local printers checked, and Sat 3 will have both Printer 1 (COM2) and Printer 2 (COM3) checked local.

Printer Type 1 is the default setting, and is also the setting used for Citizen 3551 printers with Star emulation. If you are using an Epson or Epson compatible printer, select Type 3 or 4. [NOTE: If your 40-column printer feeds 12" of blank paper when it should be cutting, you probably have an Epson mode printer, and you should select Type 3 or 4]. Type 5 is to be used for the C.Itoh Label and Barcode Blaster Label printers.

To **add a printer** to the printer set up screen, touch the Port/Name description field for the printer you wish to add, select the port and type you wish to use, and touch ADD Printer. If you do not select a port and type, the printer will not be added.

To **delete a printer**, touch the Port/Name description field and then REMOVE Printer. NOTE: You should not remove any printers before removing them from your printer profiles first. [See section 3.25 C for information about printer profiles.]

**NOTE: Remember that when you add or delete printers from the Port/Name description list, they will also be added or deleted to all other terminals in the system.**

The Reset control will return all settings to the last saved version, before you entered the printer set up screen.

For report printing, select the HP Printer button at the top right-hand of the Printer Set Up screen.

**Note: You must exit DiamondTouch and restart the program for the changes to be saved.**

### 3.25 Tickets

DiamondTouch prints tickets to designated printers, according to user designed patterns. Profiles, which link a printer and a pattern, are set up by the system designer for each defined Service Type.

Printer set up was covered in the previous section. This section will discuss how to set up Service Types, Ticket Patterns and finally the 8 available Profiles for each of the 8 possible service types (that's 64 total) that tie it all together. While this can seem a bit confusing at first, once a system is fully configured, a typical complete installation will end up looking very much like the example below:

Service Type	Profile	Printer	Pattern
Dine In	Guest Check	1. COM2	5. Guest Check
	Kitchen	3. COM4	1. Kitchen
	Bar	4. COM5	3. Bar
Carry Out	Guest Check	1. COM2	5. Guest Check
	Kitchen	3. COM4	2. Kitchen ToGo
	Bar	4. COM5	3. Bar
Delivery	Driver Ticket	3. COM4	7. Driver Tkt
	Kitchen	3. COM4	2. Kitchen ToGo
	Bar	4. COM5	3. Bar
	Customer Receipt	3. COM4	4. Dlvry Receipt

Print

Finished

As shown above, the sample restaurant offers Dine In, Carry Out and Delivery service types. The system printer on COM 4 is set up in the kitchen, while the system printer on COM 5 is set up to print in the bar. When an order is completed and a Dine In or Carry Out service type has been selected, 3 tickets will be printed. Delivery orders will print 4 tickets.

When the tickets are printed, the information on the tickets will be based on ticket layouts set up by the system designer. These ticket layouts are called "Patterns". For example, some tickets will print server names and table numbers, others may print directions for delivery drivers from the customer database. Some tickets may print pricing information. Others may print items in wide print and some may not. Patterns can also contain instructions that tell a ticket not to print at all unless certain menu categories, such as drinks, have been ordered. It's all in how the system designer sets up the patterns.

The Service Type and Patterns, like the Printer Ports in the previous section, are set up common to the system as a whole. Profiles, such as the list shown above, are set up individually for each terminal on the system.

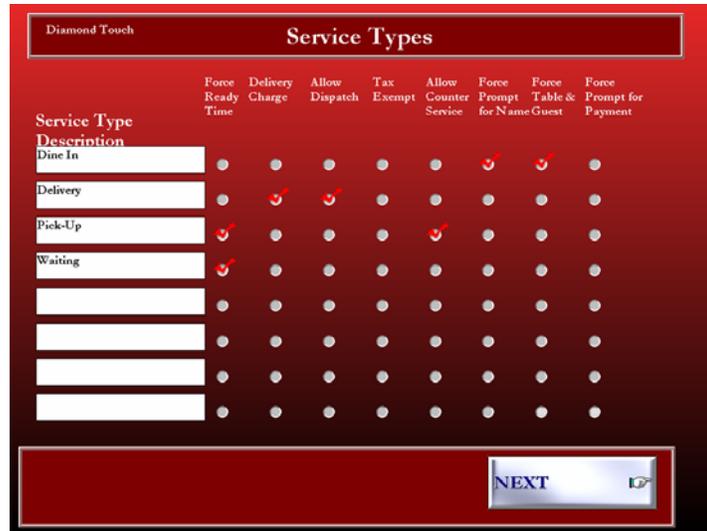
The following sections will discuss the Service Types, Patterns and Profiles concepts in more depth.

**3.25 Tickets (cont)**

**A. Service Types**

Service Types, such as Dine In, Take Out and Delivery, are used primarily to set up tickets with appropriate information, and to report totals in separate categories. In addition, you can set up your service types to operate in different ways, such as allowing Driver Dispatch or prompting for a Ready Time automatically.

To access the Service Type set up screen from the main menu, touch Set Up, select Tickets and then Service Types.



You may configure anywhere from 1 to 8 separate service types. To set up a service type, touch the white description field and type in your service type description. To configure the service type for one of the 8 service type features, touch the circle beneath the feature you wish to enable to make the red check appear. To disable a feature, deselect the circle. The Service Type features available are described as follows:

**Ready Time** - Service Types checked for ready time will automatically prompt the order taker for the Ready Time in minutes before each order can be completed. This adds some extra touches to every order, so this feature should only be checked if you need to print ready time at the bottom of every ticket for a particular service type. In the above example, only Carry Out orders will prompt the order taker for ready time.

**Delivery Charge** - If you are using automatic delivery charge by customer street/area, you will see your delivery charge at the bottom of all phone orders for a particular area. However, you will probably not want to charge your Carry Out phone orders for delivery, since the customer is doing the driving! Therefore, the above example only shows a delivery charge for delivery orders only.

**Allow Dispatch** will cause all open tickets for a selected service type to appear on the delivery dispatch screen [see section 1.90 C for more information on driver dispatch]. This designation will also cause all tickets from the selected service type to appear on the ticket status screen with delivery status information. [see section 1.60]. Generally, most operations will only check the Delivery service type for Allow Dispatch.

**Tax Exempt** will remove all taxes from a ticket for the selected service type. This can be useful for operations in States that do not charge sales tax for delivery, or for a Charity / Banquet service type that may be tax exempt.

### 3.25 Tickets (cont)

#### A. Service Types (cont)

**Allow Counter Service** is used in conjunction with the Counter Service feature described in section 3.10 A. Counter service is used to automatically enter the cash out screen once an order is completed. This is typically used in over the counter operations where customers order and pay at the same time. Once the order is cashed out, the order entry screen re-appears automatically to allow the next order to be entered with a minimum of screen touches.

A terminal that is only used for Counter Service might also take advantage of the Default Service Type feature described in 3.10 A, for even fewer screen touches. However, with both features turned on you will not have the opportunity to easily ring up the odd Dine In or Delivery Order at that station.

**Force Prompt for Name** will force the order taker to enter the customer name.

**Force Table & Guest** will force the order taker to enter the table number and the number of guests at the table.

**Force Prompt for Payment** will force the order taker to enter the payment type.

#### B. Patterns Layout

Tickets can include much more than just the items ordered. They can contain server names, table numbers, delivery addresses and/or directions, special comments, pricing and even coupons. You can use red or reverse print to highlight certain items, and even wide print to make sure the items are seen by the kitchen staff. You can omit information also, to keep the tickets brief, and recalled tickets can omit items previously ordered so that the kitchen does not make the same food twice. The system designer on the Patterns set up screen sets up all of this information, and more.

To access the Pattern Set Up screen from the main menu, touch Set Up, select Tickets, and then Pattern Layouts.

**Ticket Patterns**

Name:

1 Kitchen	2 Kitchen ToGo	3 Bar
4 Divry Receipt	5 Guest Check	6 Salad Make
7	8	9
10	11	12

Blank Lines Preceding Ticket:

Blank Lines Following Ticket:

Skip Zero Priced Modifiers
  Wide Item Print  
 Full Ticket On Edit
  No Item Skip  
 Customer Separations
  Print Coupon  
 Pricing On Tickets  
 Box Label Format

### 3.25 Tickets (cont)

#### B. Patterns Layout (cont)

There are a total of 12 patterns available. To view or edit a pattern, select the pattern by touching one of the top 12 control buttons. You may change the name of the pattern at any time by typing the new name in the Ticket Pattern Name box at the top of the screen.

The ticket set up display on the right side of the screen is divided into three sections.

- The first section, the ticket “header”, allows up to 5 lines of text. To change the header information, touch the line you wish to edit and type in the new text.
- The next 4 lines are used to set the indentation and color of Items, Modifiers, Special Request (comments) and Included Menu information. To change the indentation setting of one of these lines, touch the line.
- The last section, the ticket “footer”, allows up to 5 lines of text. Type in the information you wish to see on the bottom of the ticket. Note that the header and footer information will be centered automatically when the ticket is printed.

The **Colors** control allows you to set the colors (Red or Black) of various information on the ticket. To change the color, highlight the line and touch the Colors control. Printers that support red print will print those items shown in red; some other printers, such as thermal printers, will print reverse print (white on black) instead.

The **Format** control is used to add additional information to the top of the ticket. Specific ticket data, and user designed captions, can be added by setting up to 10 lines of format data. The information will appear just below the 5 line ticket “header”.

To add a line of information, touch the next available field on the left side of the display. The long field at the bottom of the screen is used to construct the line. To add a field to the line, touch one of the available ticket fields and then **ADD FIELD**. Note that the field number appears surrounded by brackets. You may also type a description before the field, if you wish. To add the line to the ticket, touch **ADD LINE**. The line will be added to the selected ticket line. Note that some fields, such as customer directions, can take up more than one line.

To clear a line, touch the line and then touch **CLEAR**.

### 3.25 Tickets (cont)

#### ...B. Patterns Layout (cont)

Note that to keep the tickets from getting too cluttered, and to insure that all information appears on the tickets, you should generally only add one field for each line. When you have completed your format set up for this pattern, touch Exit. The **Category** control allows you to block selected categories from printing on selected patterns. For example, if you are designing a pattern for a bar printer, you probably do not need to print tickets at the bar unless the ticket includes drinks. While setting up the pattern, touch the Category control and touch all categories that you do not wish to print at the bar. Blocked categories will be displayed with “NO” preceding the category name. Touch the category again to remove the block.

Tickets will generally only print those items that are not blocked. The one exception is when you have also checked the “No Item Skip” checkbox described below. With this option checked, tickets will still only print at the bar if drinks are included on the ticket, but No Item Skip will cause all items on the ticket to be printed (no items will be skipped).

The **Copy** control allows you to copy a pattern to another pattern. To use the copy function, first select the pattern you wish to copy by touching the pattern control 1 - 12. Next, touch copy, then touch the pattern you wish to copy the pattern to. **Blank Lines Preceding Ticket** and **Blank lines After Ticket** are used to adjust the number of lines (1-3) before and after the ticket.

There are 12 check boxes that are used to turn on or off specific features for each pattern. These are described as follows:

- **Full Ticket on Edit** - Normally, when tickets are recalled and items are added to the ticket, the ticket will only print the added items. This is to prevent the cook from making the same food twice. There are some situations, such as guest checks or delivery tickets, where you will need to see the complete ticket even if only one item was added. If you have checked Full Ticket On Edit, the ticket will print with an “Updated Ticket” header, and will include all items when items are added.
- **Customer Separations** on tickets - this option will cause the ticket to print subtotals and tax amounts after each customer separation added to the ticket. See section 1.20 E for more information about the customer separations.
- **Pricing on Tickets** will allow the pricing information to print on the tickets. If this checkbox is unchecked, tickets will print with menu quantity and menu descriptions only.
- **Box Label Format** is used for the optional box label printers. Box Label patterns will print one header label with delivery info, then one label for each item not blocked on the ticket. The Barcode Blaster label printer must be set up as a Generic Text Windows printer. First select it from the list of windows printers in the Printer Set up, and then select the Pricing On Tickets in the Ticket Pattern Layout.
- **Blank Lines between Items** will put a space between each printed line.
- **Skip 0 Price Modifiers** - This is normally used for Guest Checks to eliminate cooking instructions and other menu information that did not effect the price of the ticket.
- **Wide Item Print** will cause Menu Items to print in extra wide characters.
- **No Item Skip** will cause all items on a ticket to be printed, even if the category has been blocked. However, the ticket itself will not print unless at least one item on the ticket is not blocked. See Category description, above.
- **Print Coupon** will print either a New Customer Coupon or a Lazy Customer coupon automatically for customers that qualify for a coupon. See section 2.35 D for more information on Customer Coupons.
- **Print Second Name** will print last name on ticket.
- **Sort by Category** will sort items by category and print them in category order.
- **Consolidated Item Pricing**

### 3.25 Tickets (cont)

#### C. Profile Assignments

Profiles link a single pattern number to a single printer number, and are displayed to the order taker just before each order is completed. Each profile can be thought of as an assignment to the system to print the ticket to a designated printer according to a selected pattern.

To access the profile screen from the main menu, touch Set Up, select Tickets, and then Profile Assignments.

In the above example, 4 Service Types have been set up: Dine IN, Carry Out, Delivery and Waiting. To view the profiles for each service type, touch the desired service type control at the top of the screen. The profiles are displayed on the lower left portion of the screen. To select a profile, touch the profile printer icon. In the above example, the user has selected the Guest Check Pattern.

Each profile contains 3 pieces of information:

- A **Ticket Profile Name** - enter this in the text entry box beneath This Ticket Profile on the right of the screen. Ticket profiles that do not have a name will not be activated during order entry.
- A **Printer Number** - Select the printer number by touching a printer description in the Printer list in the upper right portion of the screen. Note that the printer number is not a port number; it is the number of the printer on your printer list. [See section 3.20 A for more information on setting up the printer list].
- A **Pattern Number** - Select the Pattern number by touching a pattern description in the Pattern list box in the upper right portion of the screen. [See section 3.20 B for more information on setting up Patterns].

A summary report is available that will detail all profiles for all service types. To view this report, touch Summary. You may print this report to your windows default printer. Note that this report is designed to be printed on an 80-column printer.

When you have finished setting up your profiles, touch finished.

### 3.25 Tickets (cont)

#### D. Coupons

DiamondTouch provides 2 types of automatic coupons: New Customer and “Lazy” Customer. New Customer coupons will print at the bottom of an order to selected printers for the first order only of a new customer. New customers are those customers with phone numbers not previously listed in the Customer Database. Lazy Customer coupons will print at the bottom of an order to selected printers for customers that have not ordered within a user defined number of days. For example, if you define the number of days at 45, all customer orders that are printed for customers that have not ordered within the past 45 days will receive a coupon.

To access the Coupon set up screen from the main menu, touch Set Up, select Tickets and then touch Coupons.



To view and/or edit the New Customer Coupon, touch the New Customer control. To view and/or edit the Lazy Customer coupon, touch the Lazy Customer control.

Each coupon allows up to 7 lines of text. To edit the line of text, touch the text box and type in the new line. Touch the Red Print, Wide Print and Center Text check boxes to enable those features for each line. For printers that support red print, the checked lines will print in red. Other printers, such as thermal printers, may print these lines in reverse (white on black) print.

For the Lazy Customer, use the list box in the upper right portion of the screen to set the minimum number of days since the last order before the coupon will print.

Note that coupons will only print to profiles that used patterns with the Print Coupon check box selected. This allows you to print coupons to only those printers that actually print the customer tickets.

To print a sample coupon, touch the Print Coupon control button. The sample coupon will print to the first local printer found. If no local printer is found, then the coupon will print to the first system printer found. See section 3.20 A for more information on local and system printers.

When you have finished setting up your coupons, touch Finished.

### 3.25 Tickets (cont)

#### E. Price Adjustments

Price Adjustments are fixed percentage discounts or gratuities available to Order Takers during order entry. Unlike the price and percentage discounts, Price Adjustments automatically recalculate the amount of the adjustment as the order is edited.

To access the Price Adjustment set up screen from the main menu, touch Set Up, select Tickets and then Price Adjustments.

Choose Discount/Gratuity	Enter Name or Reason	Enter Percent	Security
Discount	Senior Citizen	10	0
Discount	Employee	50	5
Discount	VIP Card	15	3
Discount	Manager Comp	100	0
Discount	Manager Comp	50	8
Discount	Waste	100	8
Discount	Lewisville High School Card	20	4
Discount		0	0
Discount		0	0
Gratuity	Party Of 6 or More %15	15	0

DiamondTouch allows up to 10 fixed Price Adjustments. [Miscellaneous adjustments are also available - see section 1.20 E for more information]. To set up a price adjustment, first indicate whether the adjustment will be a gratuity (added amount) or a discount (subtracted amount) by touching the Discount/Gratuity control in the far left column. Next, type in the Price Adjustment description in the text box provided, and enter a percent amount between 1 and 100.

Dedicated security levels are also available for each Price Adjustment. Select the minimum security level required to apply the price adjustment. Users with security level below the selected level will not have the capability of applying the selected price adjustment. [See section 3.40 for more information on setting up security levels.]

When you have completed setting up your Price Adjustments, touch Exit.

### 3.30 Cash Register

#### A. Starting Cash

Starting Cash is used to automatically enter a starting cash amount for the entire store onto the Balance Cash report, based on the day of the week. The starting cash amount can be edited on the balance cash report, so this feature is simply a handy time saver; it is not an enforced starting cash amount.

To access the Starting Cash set up screen from the main menu, touch Set Up, select Cash Register, and then Starting Cash. Enter the amount for each day in the next boxes provided. When you have completed all of the starting cash amounts, touch Exit.

#### B. Tender Options

Tender Options are any payment method used other than Cash or Check, during a Ticket Cash Out transaction. [See section 1.35 for more information on cashing out a ticket]. Tender Options could be MasterCard, Visa, a billable account, or even a coupon. Tender Options are simply ways to track alternate methods used to satisfy the amount owed on each ticket. To access the Tender Options set up screen from the main menu, touch Set Up, select Cash Register, and then Tender Options.



To add a tender method, touch one of the 10 tender control buttons on the left side of the screen, and type a Button Description and a Ticket Description in the text boxes provided in the top center portion of the screen. Once the descriptions are added, the tender key will appear on the Cash Out screen.

You may also wish to automatically print a credit card or memo slip for each transaction. Check the Print Supplemental Receipts button for each tender method you wish to print a slip, and check the Print CC slip check box. When the tender key is pressed during the transaction, the system will also prompt the user to swipe their credit card.

When you have finished setting up your tender keys, touch Exit.

### **3.30 Cash Register (cont)**

#### **C. Paid Out Accounts**

Paid Out accounts are used to track cash pay outs from a Cash Drawer. Paid Outs are typically set up for vendors that are paid on a cash basis during the business day. To access the Paid Out Set Up screen from the main menu, touch Set Up, touch Cash Register and then touch Paid Outs.

To set up or edit a Paid Out Account, touch one of the Paid Out control buttons and type in the new description. Once entered, the paid out description will appear as an option during a paid out transaction. [See section 1.40 H for more information on Paid Out transactions.]

#### **D. Paid In Accounts**

Paid In Accounts are designed for payment on a customer's account. To access the Paid In screen from the main menu, touch Set Up, touch Cash Register and then touch Paid Ins.

#### **E. Reimbursement Plan**

Reimbursement Plan allows you to determine how you will drivers for deliveries. To access the Driver Reimbursement Plan screen from the main menu, touch Set Up, touch Cash Register and then touch Reimbursement Plan.

There are five ways in which you can reimburse a driver:

- Dollar amount per run
- Dollar amount per ticket
- Percentage of delivery charge
- Percentage of gross sales
- Print only: percentage of gross

Once you have determined the reimbursement type, highlight the type and enter the amount per ticket.

#### **F. Paid In/Out Reporting Groups**

For the Paid In/Out Report to be accurate, you must complete the following information:

- Employee job types
- Group number must be selected for each category
- Reporting Groups

### 3.35 Tables

DiamondTouch provides a floor plan interface to allow servers to access tickets and table status simply by touching a table. [See section 1.50 for more information on Table Management.] The floor plans, sections, table placement layouts and even the “Section Zoom” ability to view other sections can be set up by the user in the Table Management Set Up screen.

To access the Table Management Set Up screen from the main menu screen, touch Set Up, select Tables and then touch Sections.



To view Sections A through Z, use the left and right arrow keys directly beneath the Description Text box in the upper right portion of the screen. You can name each section by typing in the section name in the Description text box. This name will appear at the top of the screen when the user views the Table Management Screen.

To view and select the various floor plans, use the scrolling list box in the lower left portion of the screen. Floor plans are graphic files saved in the windows metafile (.wmf) format, and are stored in the Diamond98\TblMgmt\ sub-directory. You can create your own floor plans in any windows graphics program that can store files in the metafile format, such as Visio. You can also use the “Blank” file provided to place tables on a generic floor plan without the floor plan “landmarks”.

For larger operations, you may wish to create an over-view of the entire operation from which you can “Zoom In” to sub-sections, where the actual table icons will be presented to the user. To allow section zoom from a master floor plan, check the Allow Section Zoom check box. A red cross hair will appear which divides the floor plan into 4 sections. You can maneuver the cross hair center point by touching the left-right and up-down arrows in the Allow Section Zoom Set Up window. Each of the 4 quadrants can be set up to open a sub-section when the user touches that portion of the screen. You determine which section will appear for each quadrant by selecting the section letter in the 4 list boxes provided. The section letter you select will also be displayed in each quadrant of the section display on the left portion of the screen. If you do not wish to allow a quadrant to be displayed, select None.

You can set up a more complex “layered zoom” set of sections, where section A zooms in to Section B, which Zooms into section C, which zooms into Section D, and so on. Keep in mind that the first section found (searching Alphabetically) with section zoom enabled is the one the user will see when the top of the Table Management screen is touched to “Zoom Out” back up to the highest level.

### 3.35 Tables

To place tables onto a section, touch the Table Placement button.



To add a table, touch the Add Table button, and the new table will be added to the upper left portion of the floor plan. To position the table, touch the table as close to the center as you can, and drag the table into position. To delete a table, touch the table and then touch Delete Table button.

You can change the table number and table picture by selecting the table and then touching the Table Features button. Use the list box in the lower left portion of the Table Features screen to select a table. You can “stretch” the table to the Extra Wide or Extra Height state by checking the appropriate check box. Use the list box on the right of the Table Features screen to select the Table Number. When you have completed setting up the Table, press the Finished control in the Table Features window.

When you have completed placing all of the desired tables onto a section, touch the Finished button on the Table Placement set up screen.

### 3.40 Employees

#### A. Employee Set Up

The Employee database is used to store the names and password levels of all users. In addition, pay rates, personal information, comments and even a photo can be stored as part of the employee record. To access the employee set up screen from the main menu, touch Set Up, select Employees and then touch Employees.

To move through the employee records, use the arrow scroll bars at the lower left portion of the screen. The black left and right arrows will move one record at a time; the blue arrow button controls will move to the first record (left arrow) or the first available record (right arrow). The record number will always appear just to the right of the Last Name field at the top of the screen.

To activate a user, you must enter a last name, a first name, a password, and a security level. If you wish to take advantage of the Sales VS Labor reporting capabilities of the system, then you should also enter hourly pay rates as well.

The main form also provides fields for address, phone, date of birth, sex, driver's license number and State. Many of these fields will appear on the employee database report described in section 2.30 A.

The **Security Window**, shown above, will also allow edit of the security level, password/new card, and comments. To access from the Employee Database screen, touch the Security button at the bottom of the screen. A photo field is also available. To edit the photo field, touch the photo to bring up the photo library. Photos are stored as .jpg files. You may wish to take your own employee photos with a digital camera and store them as .jpg files in the Diamond98\Photos directory. DiamondTouch can read only 6 photos at one time. We suggest that you place only 6 photos in one folder. To select a photo from the library, simply touch it and the photo will be attached to the employee record.

To issue a new card, touch the Issue New Card button and swipe the new card. The new 4 digit password will also be displayed in the password field. If you wish to enter the passwords manually, simply touch the password text box and enter the new password.

The security level is selected by scrolling through the available security levels and touching the desired number 1 - 10. Employees will be able to access all functions with security levels at or below the employee security level. See section 3.40 B for more information on setting up security levels for various functions.

**3.40 Employees (cont)**

**A. Employee Set Up (cont)**

The **Payroll Window** allows you to set the employee Social Security Number, Date of Hire, and the regular and overtime rates for up to 5 different job classifications. If you do not enter an overtime rate, overtime will be calculated at time and ½ automatically on the labor reports.

The job classifications correspond to the job code indicated by the employee during sign on. The Job Descriptions field is reserved for future use. Costs for Salaried Employees will not be included on the hourly labor reports.

To add a new employee, touch the Add button and the first available blank record will be displayed. You can also use the right arrow button to scroll to the next available blank record and add the employee. To erase an employee, touch the erase control to clear all information from the record shown. Once you have finished editing the employee database, touch finished.

**B. Security Levels**

Security levels in DiamondTouch are assigned to specific functions within the program. The more secure you wish to make the function, the higher the security level will be. For example, you may wish to make order entry of Tickets a relatively low level function, to allow any server to place an order. Handling cash to cash out tickets might require a higher level, and opening and closing a register drawer might require a higher level still.

To access the Security Set Up screen from main menu, touch Set Up, select Employees and then touch Security Levels.



The security level functions are divided into three columns, which roughly correspond to User Functions (Order Entry, Cash Out, Driver Dispatch), Manager Functions (Reports, Time Cards, etc) and System Set Up Functions. To select a function, touch the description. The select function will be highlighted in yellow, and will be displayed in the upper right portion of the form. A short description of the function will appear in the help box, and the current security level will appear just below. To change the security level of the function, use the left & right scroll arrows. When you have completed setting the security levels, touch Finished.

NOTE: You must exit DiamondTouch to activate these changes.

### 3.50 Customers

To process phone orders for take out, delivery, or any other service type, DiamondTouch utilizes a Customer Database. The database was designed using the Microsoft Access97 compatible 32 bit Jet Database Engine, and includes tables for Customers, Streets, Delivery Areas and Zip Codes. There is also a “hidden” table that is used to track customer order history.

All tables in the customer database can be accessed and viewed directly from Microsoft Access97. The active database is stored in the Diamond98\mdb\ sub directory.

#### A. Customer Database

The customer database is normally viewed on record at a time, when placing orders. There are a number of search utilities built into the customer screen, and these are discussed in section 1.85.

To view the entire table of all customers, sorted by phone number, from the main menu, touch Set Up, select Customers and then touch Customers. The grid that displays customer data can also be used to edit the individual customer fields. The key phone number field can be edited; however if the phone number you are trying to enter has already been used, the Jet Engine will not allow you to duplicate the field. This is because DiamondTouch relies upon the phone number as a unique record for finding your customers; if the phone record was duplicated, then the 2<sup>nd</sup> record would become “hidden” from the Order Taker.

The Customer Database includes the following fields:

Phone	Phone Number	Up to 10 characters
Zip	Zip Code	Up to 10 characters
Num	Internal Use	“Long” Number
LastName	Customer Last Name	Up to 30 characters
FirstName1	First Name	Up to 20 characters
FirstName2	Spouse, etc	Up to 20 characters
Add1	Street Address	Up to 30 characters; the first set of numeric characters will be interpreted as the street address;
Add2	Secondary Address	Up to 30 characters. This data could include apartment numbers, company names, etc. Some of this information is appended to printed tickets, to the extent that the primary address is less than 20 characters.
StreetNum	Internal Use	“Long” Number
Directions	Driver Instructions	Memo Field - unlimited length
DOB	Date of Birth	Up to 8 characters - for “Birthday” mailings
CR	Carrier Route	4 characters - mailing data
Mg1	Map Grid Field 1	Map Book Coordinates
Mg2	Map Grid Field 2	Map Book Coordinates
Comment	User Comments	Memo Field - Unlimited Length
Fcard	Frequent Diner Card#	Up to 6 characters
FCDate	Frequent Diner Date	Up to 8 characters
TotPt	Total Points Earned	Double Precision Number
Points	Current Points Earned	Double Precision Number
DSLO	Date of Last Order	Up to 8 Characters
TO	Total Orders	Integer to 32,768
ToDol	Total Dollars	Double Precision Number
CustRecordNum	Internal Use	Long
StreetRecordNum	Internal Use	Long
ZipRecordNum	Internal Use	Long
AreaRecordNum	Internal Use	Long

### 3.50 Customers (cont)

#### B. Street Database

The Street Table in the Customer Database is used to match and verify incoming customer calls to appropriate addresses and delivery areas, and to automatically capture city, state and zip code information. Use of the street database is an optional feature in DiamondTouch. See sections 1.85 F and 3.10 A, 3 for more information on Street Database features.

To access the street table from the set up main menu, touch Customers then Streets. Streets are displayed in alphabetical order, and the display grid can also be used to edit and add to street records.

The Street Table in the Customer Database includes the following fields:

Name	Street Name	Up to 50 characters
RgStart	Range Start	Integer to 32,000. This number is the starting address for this record. To facilitate the mapping of delivery areas, a single street can be divided by address ranges into as many records as necessary, simply by grouping the starting and ending address ranges into separate records. For example, Main Street 100 - 499 could be one record, and Main Street 500-999 could be a second record. By assigning each record different delivery areas, 255 Main Street could be charged a \$2.00 delivery fee while 668 Main Street could be assessed a \$3.00 charge because it is further away. See section 3.50 E for more information on setting up Delivery Areas.
RgEnd	Range End	Integer to 32,000 - ending address range.
MapGrid1	Map Coordinate	Up to 4 characters.
MapGrid2	Map Coordinate	Up to 4 characters
CR	Carrier Route	Up to 4 characters
Zip	Zip Code	Up to 10 characters
StreetRecordNum	Internal Use	Long
ZipRecordNum	Internal Use	The record number of the Zip Code Record
AreaRecordNum	Internal Use	The record Number of the Delivery Area Record (1 - 6) for this street.

The street table can be initialized (erased and re-created) by allowing DiamondTouch to automatically search a pre-loaded Customer Table and “Infer” a street table from the existing customer records. A street table created in this manner would be a starting point only, since the beginning and ending addresses would only represent the first and last addresses found in the customer table; not the true beginning and ending ranges of the streets. In addition, different spellings of the same street in the customer database would result in 2 records for the same street. However, this method could save quite a bit of data entry time on the front end, if a pre-loaded street database is not available. To enable this feature, you must place a file named “MakStreet.RTC” in the Diamond98 directory. Once this file is present, the initialize control will appear on the street table screen. NOTE: Once initialized, you should destroy the “MakStreet.RTC” file to insure that your street table is not erased accidentally by a subsequent initialize command! There is no way to undo this operation once the initialize control is touched!

### 3.50 Customers (cont)

#### C. Zip Codes

The Zip Code table is used simply to automatically store City and State information for customer and/or street records. By loading the zip code table, customer and street records can “look up” the City and State fields for mailing purposes without having to enter these fields for every customer/street record. You may wish to take advantage of this table when creating your own reporting and mailing queries in Microsoft Access.

To access the Zip Code table from the Set Up main menu, touch Customers, then Zip Codes. The Zip Code table includes the following fields:

ZipCodeNum	Zip Code	Up to 10 characters
City	City Name	Up to 35 characters
State	State Initials	Up to 2 characters
ZipRecordNum	Internal Use	Long

#### D. Customer Points

Customer Points can be used to track and award customers based on the amount of sales volume, over a period of time. Customer Points are automatically awarded at the end of each order and are stored in the appropriate record in the Customer Table of the Customer Database. The number of points awarded is based upon a look up table set up in the Customer Points set up screen, and is based on the final amount of the ticket saved.

To access the Customer Points set up screen from the main menu, touch Set Up, select Customers and then touch Points.

From	Dollars	To	Dollars	=	Points
1		5			10
5		10			20
11		20			30
21		30			40
31		40			50
41		50			60
51		60			75
61		70			85
71		80			95
81		90			110
91		100			130
101		150			150

**Finished**

Enter the From - To dollar range and Points amount for each level of award you wish to set up. When the ticket is printed, DiamondTouch will search each level for the first range that the total ticket value fits between - therefore be sure to enter a very high dollar figure for your last point's level - otherwise a particularly high ticket will receive no points at all!

See section 1.85 C for more information on viewing and adjusting individual customer points.

### 3.50 Customers (cont)

#### E. Delivery Areas

Delivery Areas are used in conjunction with the customer and street database to automatically assign minimum order amounts and delivery charges to phone orders. You may set a delivery area to simply alert the order taker that there is a set minimum order amount, or you may wish to automatically assess a delivery charge to all orders under a set minimum. You can also assess a delivery charge to all orders, regardless of any minimum amount by area.

To access the delivery set up screen from the main menu, touch Set Up, select Customers and then touch Delivery Areas.

You may scroll through the 6 available delivery areas by using the list box in the upper center portion of the screen. Each area can be set up with a description, which will appear on the order entry screen, an optional minimum order amount and a delivery charge amount. Under the advanced window you may also set the Minimum Order Type and Delivery Charge method by touching the option for each delivery area.

All customers will be assigned to delivery area 1 as default; therefore you should set up this delivery area with the most common delivery information. If most customers are not charged a delivery charge and there is no set minimum, then Delivery Area 1 should be set to 0.00 Minimum and 0.00 Delivery Charge.

If you have set an amount for a Delivery Charge in an area, then you will need to set the Delivery Charge method to “All” (all orders charged the set delivery charge amount) or “Orders Under Minimum” (Delivery Charge will only be assessed to orders that fall below the minimum order amount you have specified for this delivery area.)

If you have set a minimum order amount, and you are not using the minimum order in conjunction with a delivery charge, then you will also need to select the Minimum Order method to

- Alert Message Only (a message box will appear if the order does not meet the minimum)
- Enforced Allow Over-Ride (Order Taker will be required to over-ride the error, and an over-ride event will be logged by the system), or
- Enforced, No Over-Ride - The Order Taker will not be allowed to complete the order until the minimum amount is reached.

### **3.50 Customers (cont)**

#### **E. Delivery Areas (cont)**

If you have set a minimum order amount, and you are using the minimum order amount in conjunction with a delivery charge, then you will need to set the Minimum Order method to one of the following:

- **Alert Message Only** - The delivery charge will not be set automatically, but a red warning box will appear alerting the order taker that a minimum order and set delivery charge is recommended. The order taker will have the option of attaching a Delivery Charge to the Order manually [See section 1.20 E].
- **Enforced Allow Over-Ride** - The delivery charge will be assessed at the end of the order automatically. The order taker will still have the option of changing the delivery charge using the manual delivery charge control [See section 1.20 E].
- **Enforced - No Over-ride** - The Delivery Charge will be assessed and the Order Taker will not be able to remove the delivery charge manually.

In all cases, Delivery Charges are only assessed to those service types that have been checked for Allow Delivery Charge [See section 3.25 A.] This is done to prevent Pick Up customers that have phoned in their orders, for example, from being assessed delivery charges.