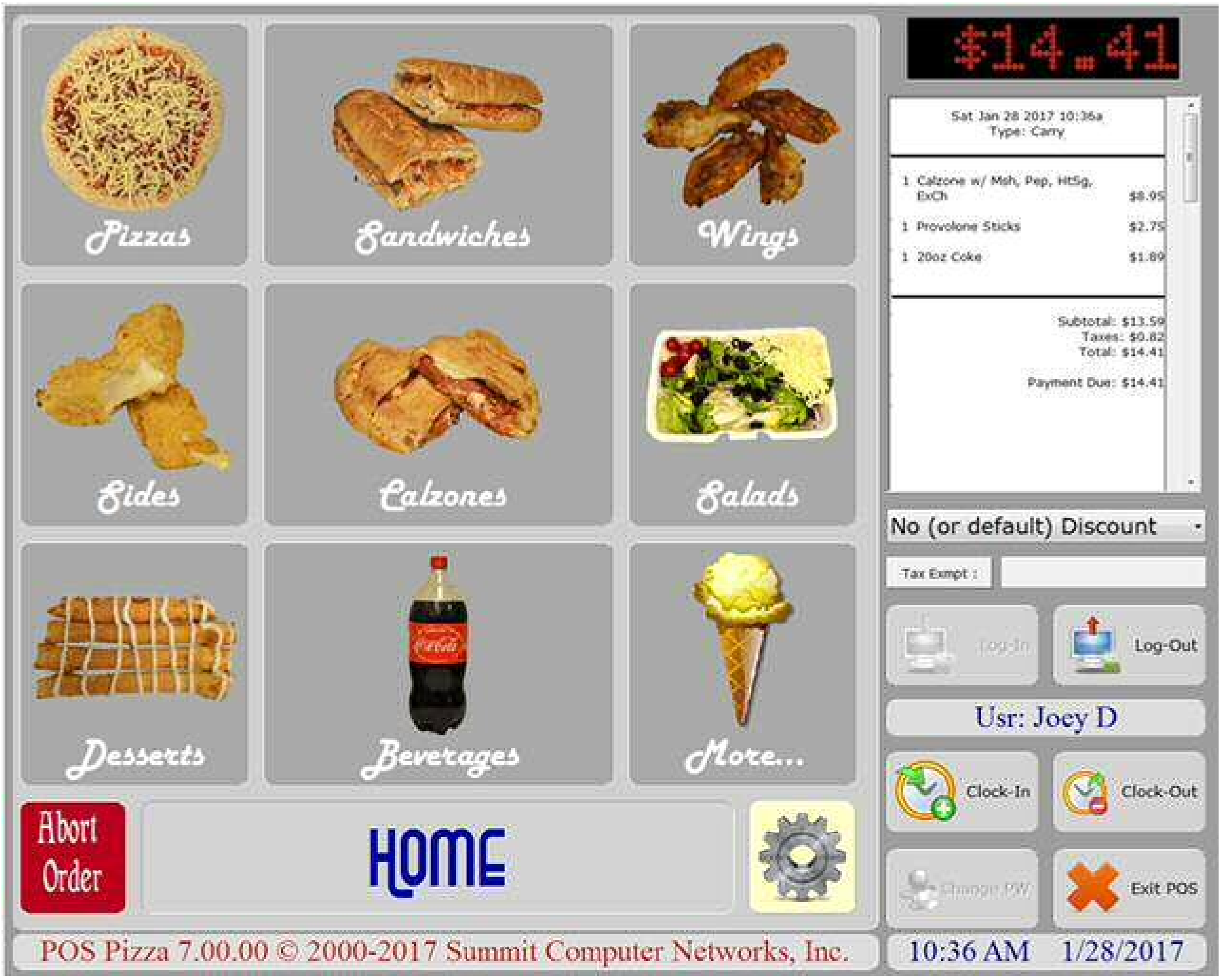
Premium POS Pizza Order Entry Module



Introduction and Tutorial

Overview

The premium POS Pizza module is a replacement for the standard order-entry module. The standard module will still continue to be developed and will remain a central part of the POS Pizza package. This new module is for those who want to optimize their workflow for their own specific needs, and ease of use. The premium module lets you decide what the workflow will look like, and allows you to decide what features get included and where. The premium module gives you a user definable area that can house up to 49 buttons per page, and 255 pages of buttons. These buttons can perform any number of tasks from adding an item, or a group, to reprinting a receipt or opening the cash drawer. You decide the layout, the main screen colors, the button colors, their wording, fonts, and icons, or if they have one at all.

The Tutorial: Getting Started

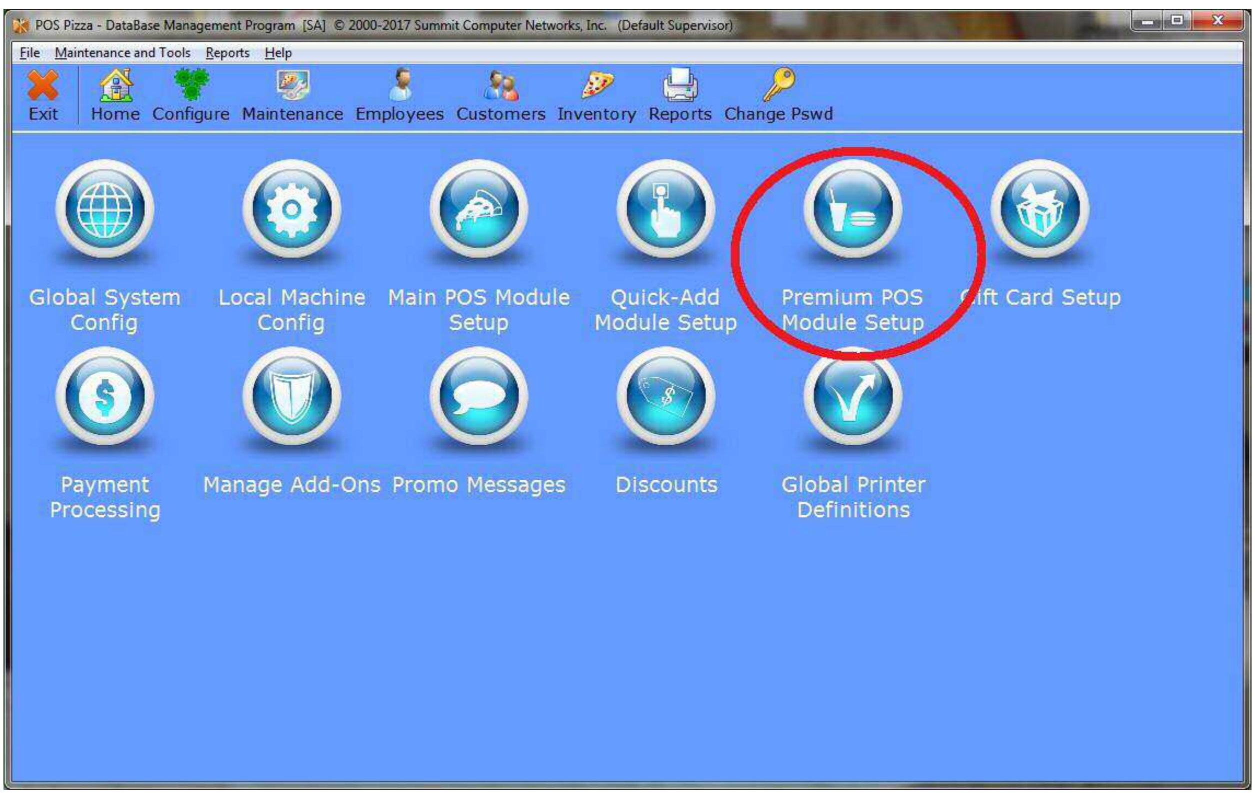
Before using this module, you should have the standard Main POS Module working to your satisfaction. This would include employee rights, and your menu. Once you have menu items setup and pricing and discounts, and everything else working to your satisfaction, you can now begin deciding if you want to use the premium module, and if so, how to lay it out.

Think about your workflow. Do you want to get the order-type (Pickup, Delivery, Dine-in) first? Do you want to get the customer's phone number first? Or do you want to simply start adding items to the order. This matters because you want to decide what should be on your first page. In our tutorial we will keep the first page flexible so that you can work in any of these ways. You should also note that the Premium POS module uses all of the settings in the management utility that the Main POS module uses except for the following.

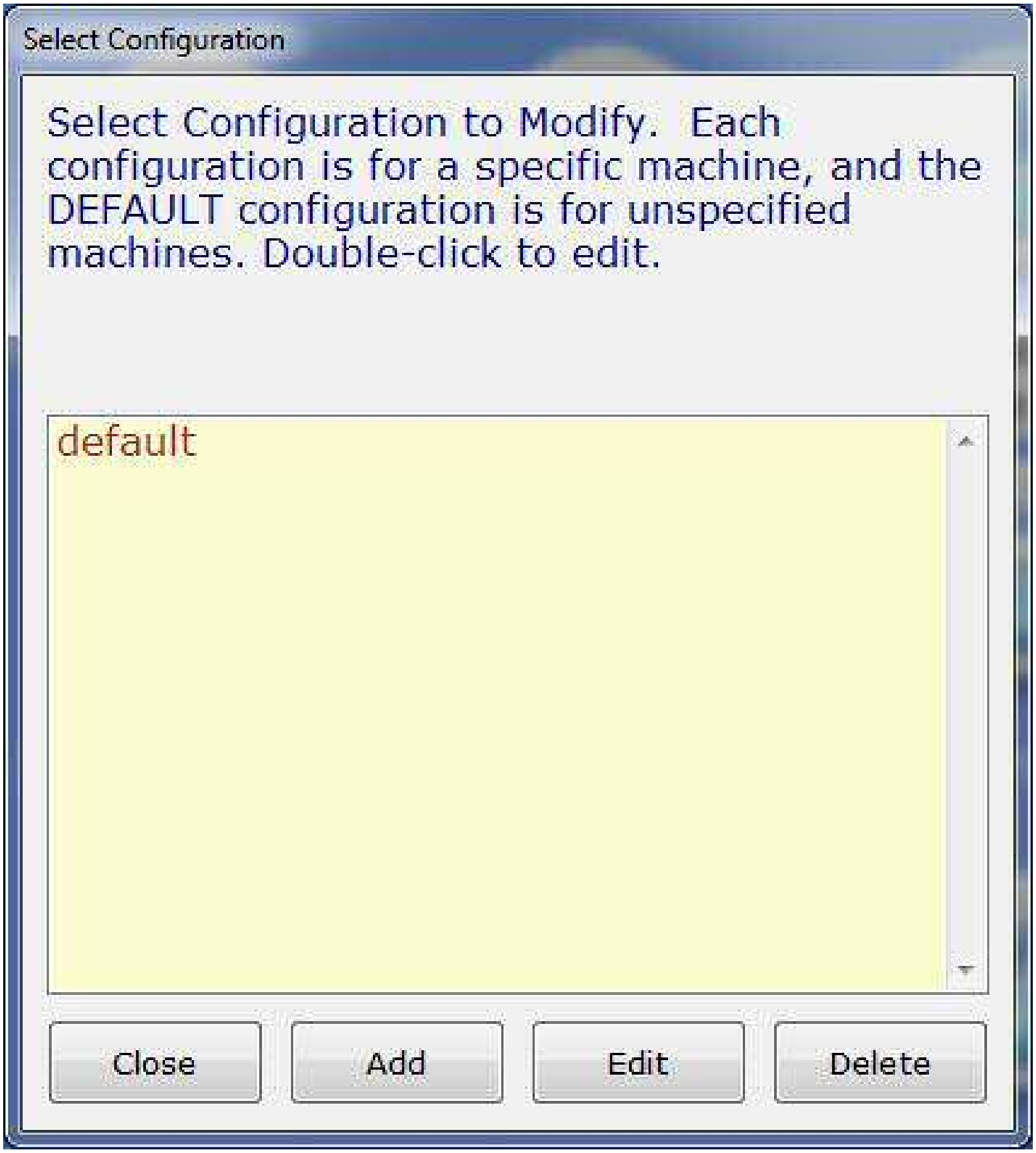
- Gray Delivery Option for out of area – the premium module uses a different workflow so it won't allow you to select delivery for an "out of area" customer.
- Double-Click on Add Item closes window – the premium module does not add items from an item list, it adds an item when a button is clicked that is set to add that item.
- Item Categories – the premium module does not use the item categories filter since it does not use an item list. Instead buttons for categories will be created.

Start building your layout

Go into the Management Utility program and find the Premium POS Module Setup button.

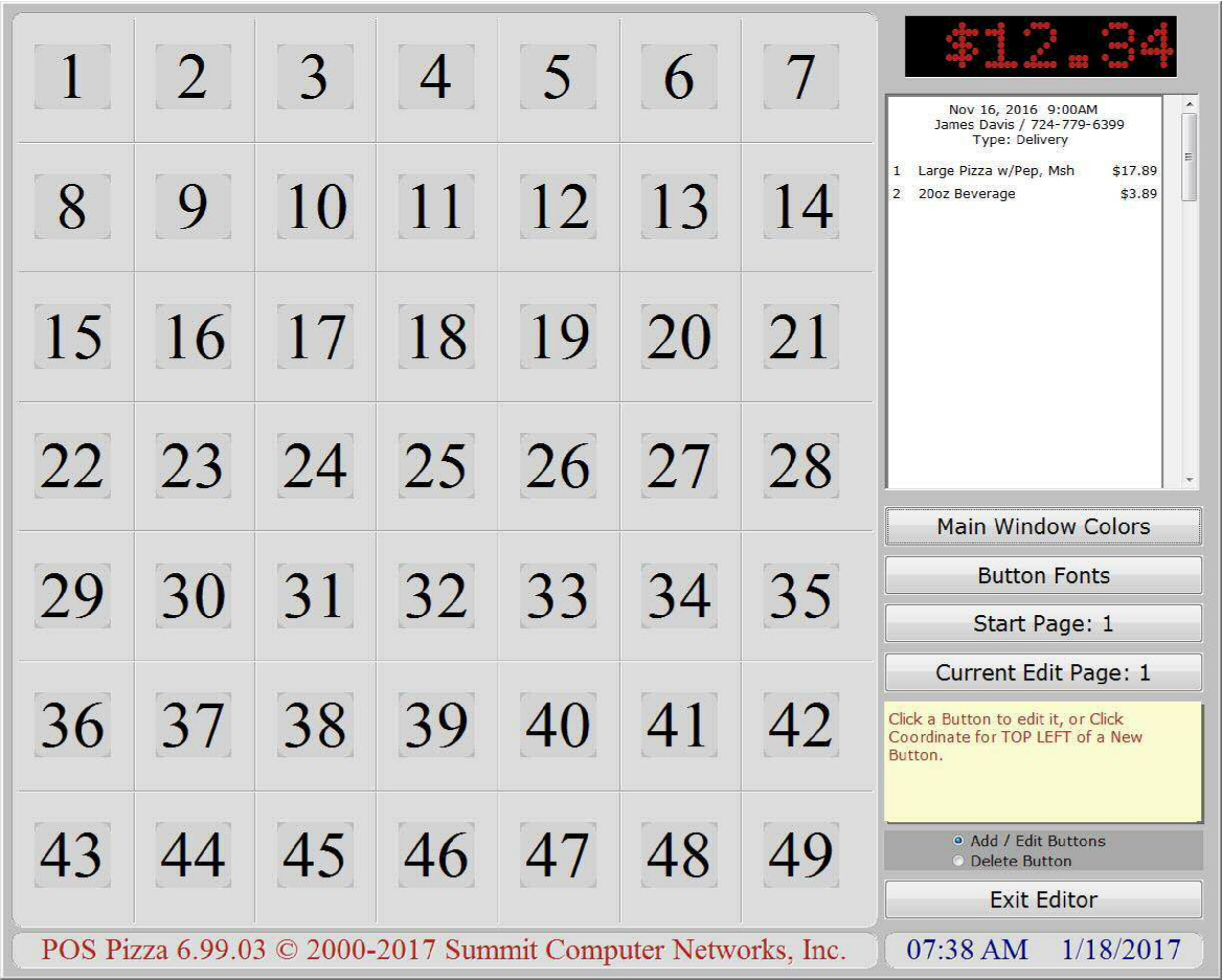


This button will take you directly into the editor in the [SA] version, or it will take you to a machine list (pictured below) for the [CS] version, exactly like the quick-add module.



When stations start up this module, they will use the computer name that matches that particular station's computer name as set in Windows. If a name cannot be located, the "default" profile is used instead. Many will only setup the default profile as they want all of their machines to have the same workflow. Using the machine names you could effectively setup a couple of templates, and then copy those templates to machines in your network for specific tasks such as "phone answering station", "front counter station", etc.

The Editor



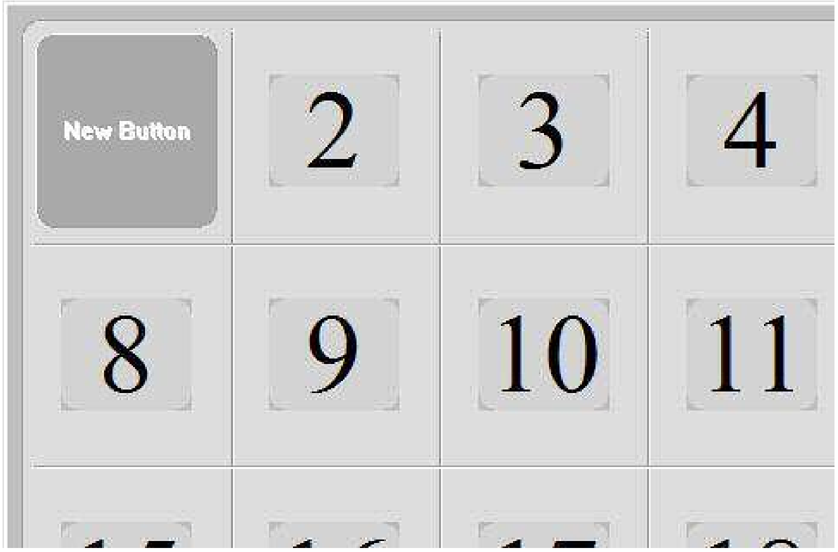
When you first run the editor, it will have the default colors set and no buttons at all. You are staring at a blank slate here so you will want to have a good idea of your desired workflow. In this example we will put the most common functions on page 1, which is the start page and work from there. Note, that you can set any page as your start page should you need to change things. The start page is the first page of buttons shown immediately after an employee logs in.

In the yellow dialog on the right middle bottom there is directions for adding a button. Immediately below that dialog is a pair of radio options for add/edit and delete. This stays on add/edit by default. To add your first button, click the area on the user area (numbered grid) where the TOP LEFT corner of the button should be located. Click grid #1. Notice that it turns red (picture below), and that the yellow dialog is now telling you the next step.

The 1 is now shown in red.

The Yellow dialog is telling you what to do next.

Now click grid #1 a second time (you can click the same one to create the smallest button size available).



You have now created your first button. You can now edit the button by clicking the button. When you do this you will see the window below open.

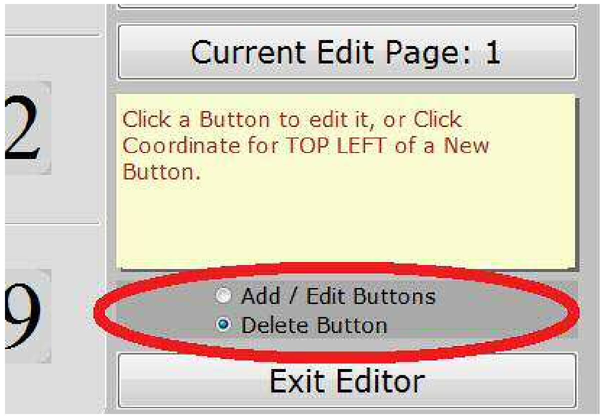
This window allows you to set all of the parameters for the button that you just clicked. You can set the text, the font, the text position, the icon, the icon position, the face and text colors, and the icon size. In addition you can choose the function of the button. The available functions are listed below.

Button Functions

- Label (Flat Type) -- Labels don't do anything and are only used to label your pages or sections.
- Label (Sunken Type) – Sunken Label.
- Label (Raised Type) – Looks like a button, but can't be clicked. Note: Fonts on labels add a 3D look so they look a little thicker and like they're stamped into the label surface.
- Go to page – when clicked, another button page is loaded. Most other functions can also set a page to go to after their function has been performed. This is especially handy when adding items to return you to the main page showing the list of categories etc.
- Add Item to order – Adds the selected inventory item to the order.
- Add Group to order (fixed) – Adds the selected item group to the order.
- Add Group to order (list) – Adds a group picked from a list of available groups to the order.
- Add non-inventory item to order (fixed) – Adds a non-inventory item to the order whose description, price, and taxes are set with the button. These types of items cannot be edited on the main order, only added or removed.
- Add non-inventory (open) – This adds a non-inventory item to the order and allows the cashier to set the price, text, and taxes for the item. This type of non-inventory item can be edited.
- Clear/Abort/Reset current order – completely resets the order. Any items, customer assignments, type picks will all be removed and a new default order will be ready.
- Type Delivery (w/Cust) – Prompts for a customer and sets the order type to delivery. If the customer is out of the area then the order type will not be set to delivery.
- Type Carryout (w/Cust) – Prompts for a customer and sets the order type to carryout.
- Type Carryout (no Cust) – Sets the type to carryout, and clears any customer information to walk-in or no customer.
- Type Dine-in (w/Cust) – Prompts for a customer and sets the order type to dine-in.
- Type Dine-in (no Cust) – Sets the type to dine-in, and clears any customer information to walk-in or no customer.
- Submit Current Order – Saves the current order to the database, prints receipts, and sends items to make-lines. A new empty order is created immediately afterward.
- Cash out/Settle Order – Shows a list of orders where payment has not yet been received allowing the cashier to choose an order to settle.
- Void Order – Shows a list of orders according to the current cashier's void rights, and allows them to void an order.
- Edit/Load Order – Loads an existing order back into the POS for further editing. Submit the order once the changes have been made to save the edits.
- Account Payment to Order – Allows a customer to make a payment on their account or tab.
- Purchase Gift Card – Add a gift card for purchase to the current order.
- Activate Gift Card – If activation after payment failed, then use this function to activate the card after payment has been settled.
- Gift Card Info – View information about a specific gift card (balance, expiration).
- Issue Customer Credit – Issue a credit to a customer.
- Paid Out – Use for paid outs or paid ins on the current drawer. A positive value is a paid out, and a negative value is a paid in.
- Open Drawer – Opens the cash drawer (No Sale).

- Print Receipt – Allows reprinting a receipt.
- Credit Card Functions – Allows adding a tip, or reprinting credit card slip when using an integrated card processing module.
- Quick Reports – Displays configured quick reports according to Cashier's rights.
- Open Shift – Opens the current station's shift.
- Close Shift – Closes the current station's shift.
- Select Customer – Selects a customer and assigns them to the current order. The order-type is not changed.
- Current Customer Information – Shows information about the currently loaded customer, and allows you to view and duplicate any order from their past order history. Duplicate order only works if no items are on the current order.
- Clear Customer, set to walk-in – Removes customer info from the current order and sets it to a walk-in type. If the order type is delivery, the type will be changed to unselected. Carryout and Dine-in types will not be changed.
- Edit Current Customer – Launches the customer editor for the currently loaded customer.
- Show Map – Show a map from the store's location to the customer's location. Works only when a customer with proper address info is loaded.
- Type Carryout – Sets the order type to carryout without changing the customer.
- Type Dine-In – Sets the order type to dine-in without changing the customer.
- Launch App / Open Web Page – Launches any external application or goes to a website. Web sites must have the http:// designator before the address.
- Launch Management Utility – Launches the POS Pizza Management Utility program.
- Launch Driver Dispatch – Launches driver dispatch console (only on [CS] version).
- Assign Driver – Assigns a delivery driver to a currently saved order. This is not needed if you use the driver console.
- Delivery Stats – Shows all information about delivery orders in-store, and out for delivery including the drivers who are delivering them, time out, and order content. This only works for people who are using the driver dispatch module, and is not available in the [SA] version.
- Type Delivery (if able same cust) – Set the order type to delivery, provided that the currently loaded customer is within the allowed delivery area.
- Type Delivery (Intelligent) – Set the order type to delivery, using all means available within this function. If no customer, allow cashier to choose. If current customer address info is incomplete, allow current cashier to edit (if they have edit customer rights), if current address is out of area, allow cashier to override by setting a customer-level delivery fee if they have edit customer rights.
- Discount / Surcharge to Order – Adds a discount or a surcharge to the entire order. Positive values are treated as a discount, and negative values are treated as a surcharge. Discounts will be applied to all items that are not restricted from being discounted. Surcharges will apply to all items on the order.
- Discount Last Item (if able) – Add a discount to the last item added to the order. This only works if the last item on the order does not have a negative price (another discount or coupon), and if the last item is not restricted from having discounts applied.

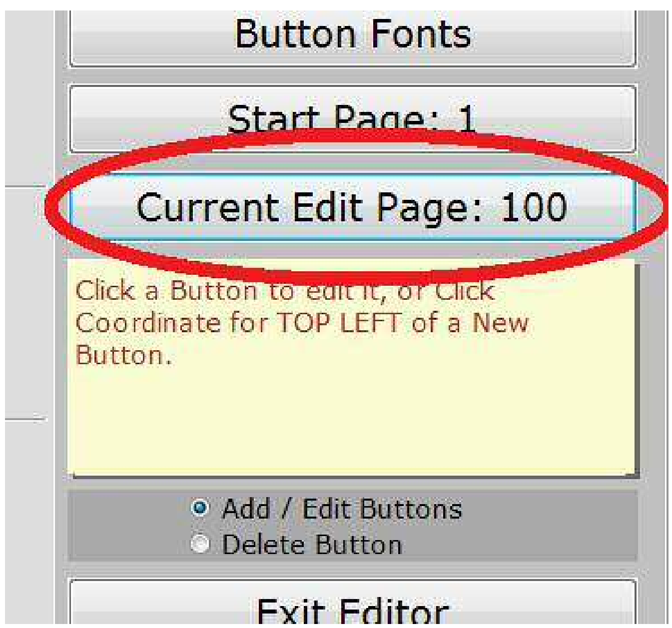
Next lets delete the button that we just created. To do this select the “Delete Button” radio option on the lower right part of the main window.



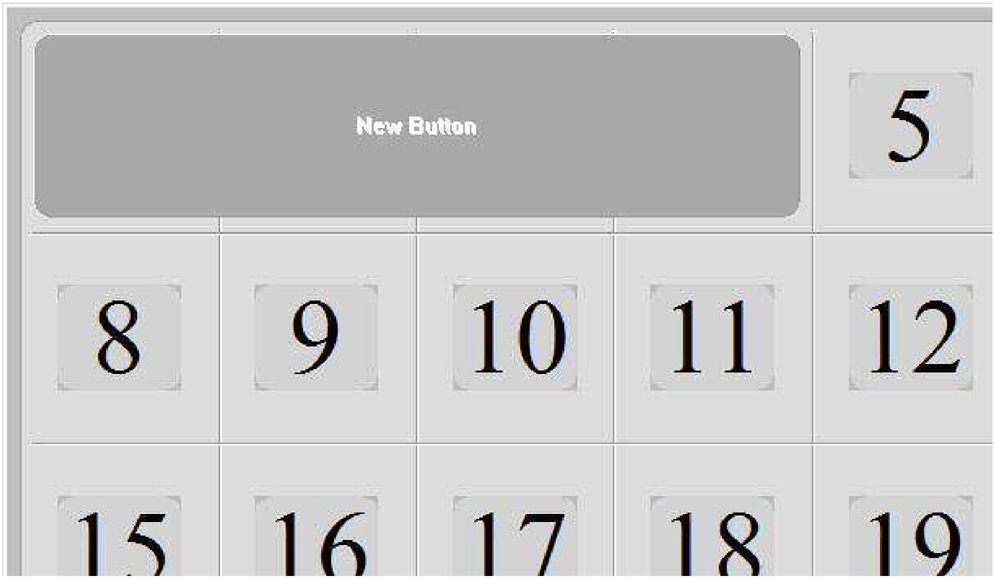
Once “delete” has been selected, click the button that you want to delete. Delete the button that we just created by clicking on it. You will be prompted as to whether or not to proceed with the delete operation. The radio option will return to its default position of Add/Edit as soon as the delete is completed.

Now you know the basics of how to add, edit and delete buttons. Next let’s actually begin designing our layout. We will start by selecting our button fonts. To do this I suggest going to page 100 since it should be out of the way for most people.   We will then create 7 buttons (one for each font) that let us easily see our selected fonts.

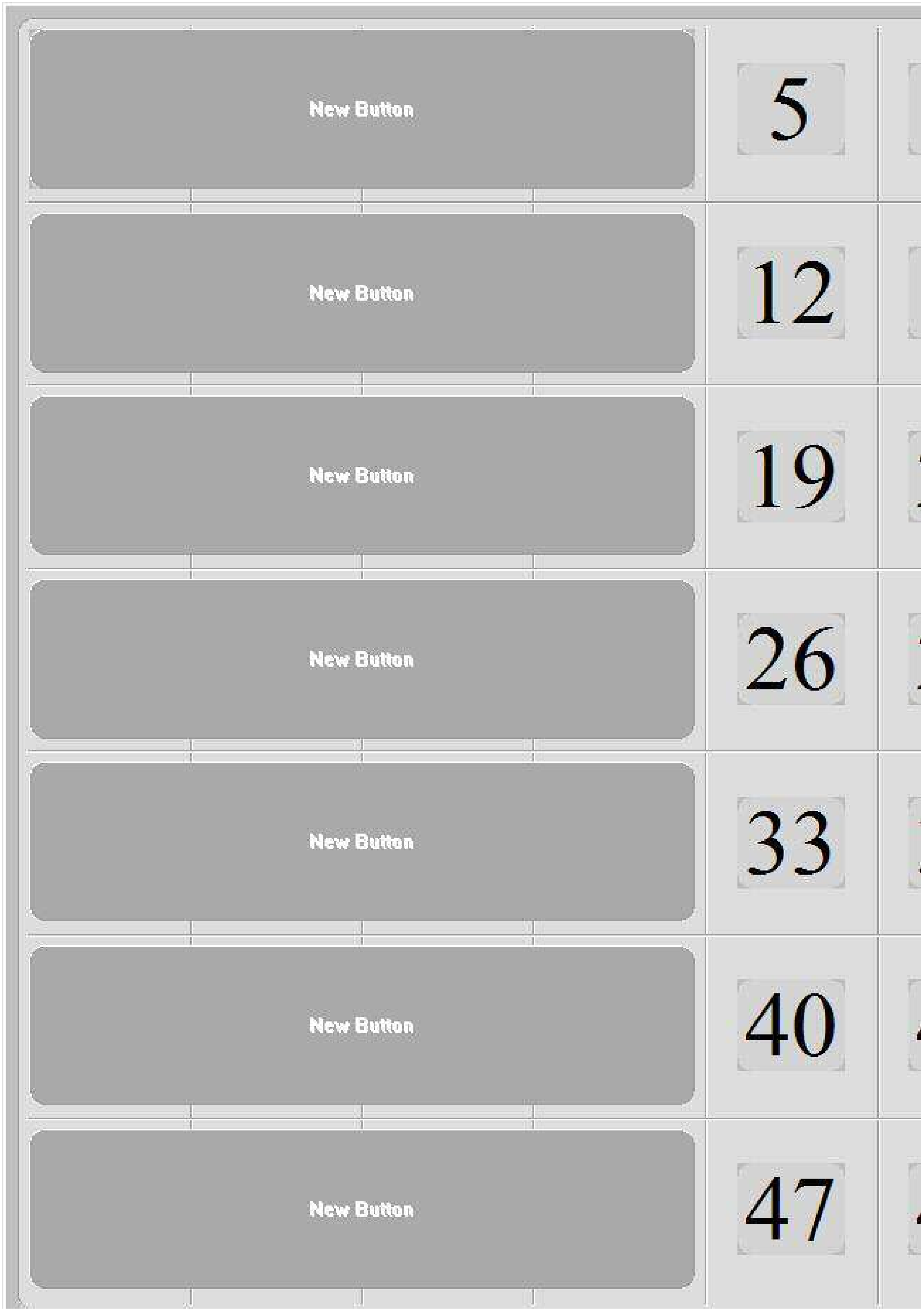
Click the Current Edit Page button and then type 100 into the box and click GO. The edit page button should show 100 like below.



Next click area 1, followed by area 4, creating a new long button like the one below.

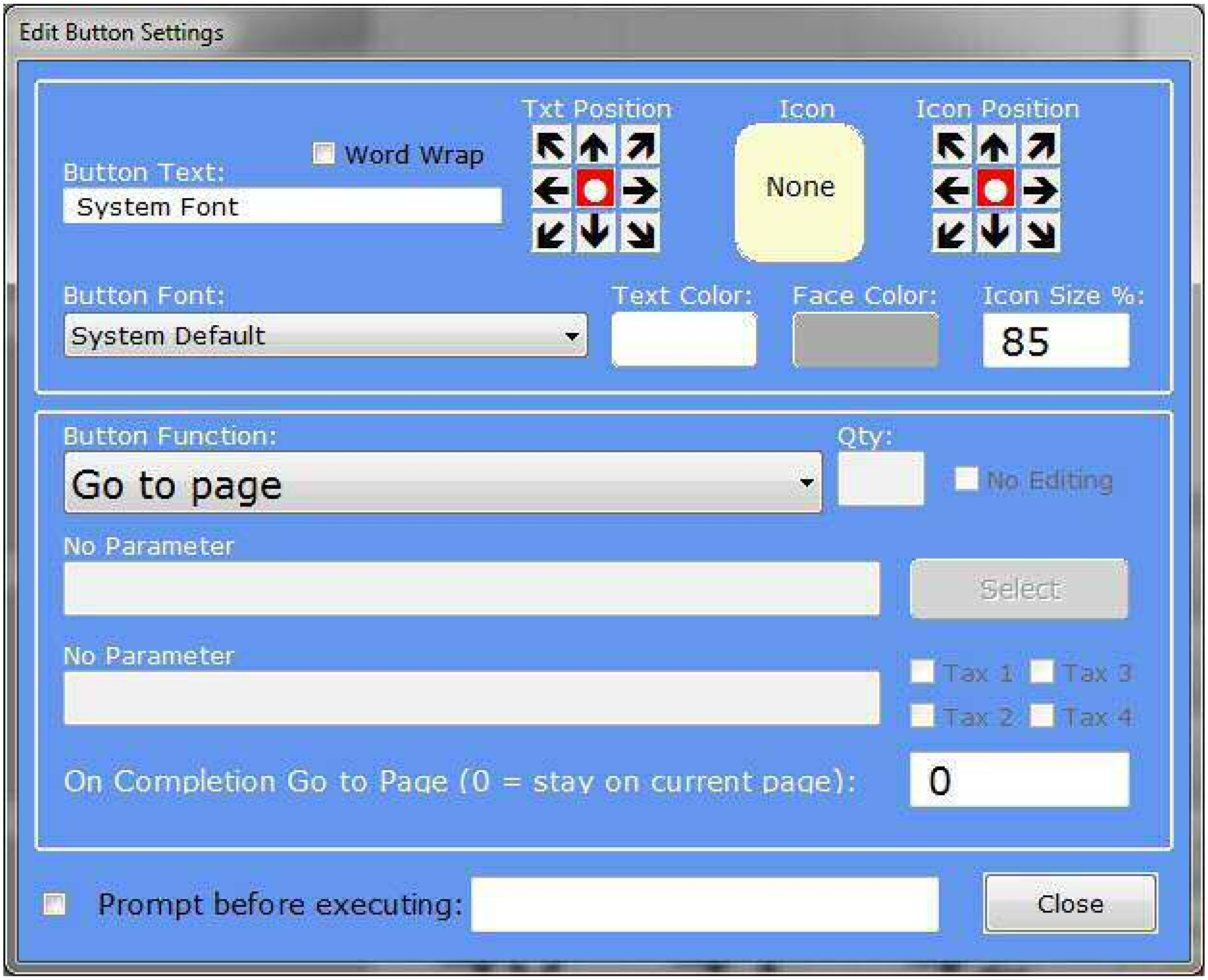


Continue adding more buttons directly below this one, click area 8, then 11. Click area 15, then 18. Click area 22, then 25. Click area 29, then 32. Click area 36, then 39. Finally click area 43, and then 46. Your screen should look like the one below.



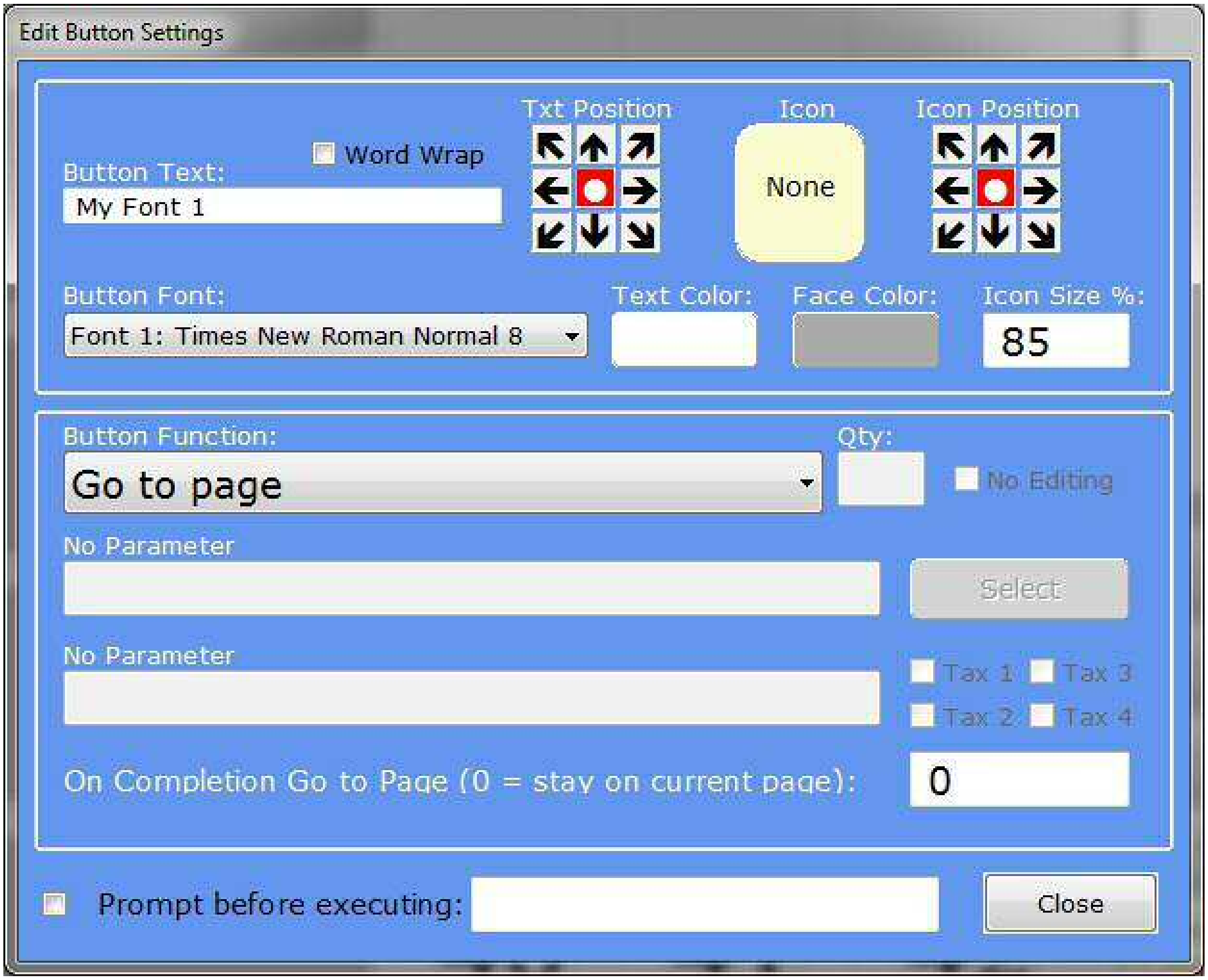
Now we want to edit each of these buttons setting the various fonts and text on them. We will set all of these button's functions to "Go to page" since the font will not be put in 3D mode like on labels.

HINT: You can move the blue button edit window around your screen so that you can see the button that you are working on. The button will change in real-time as you change its settings. This is handy when setting text, fonts, colors, etc.



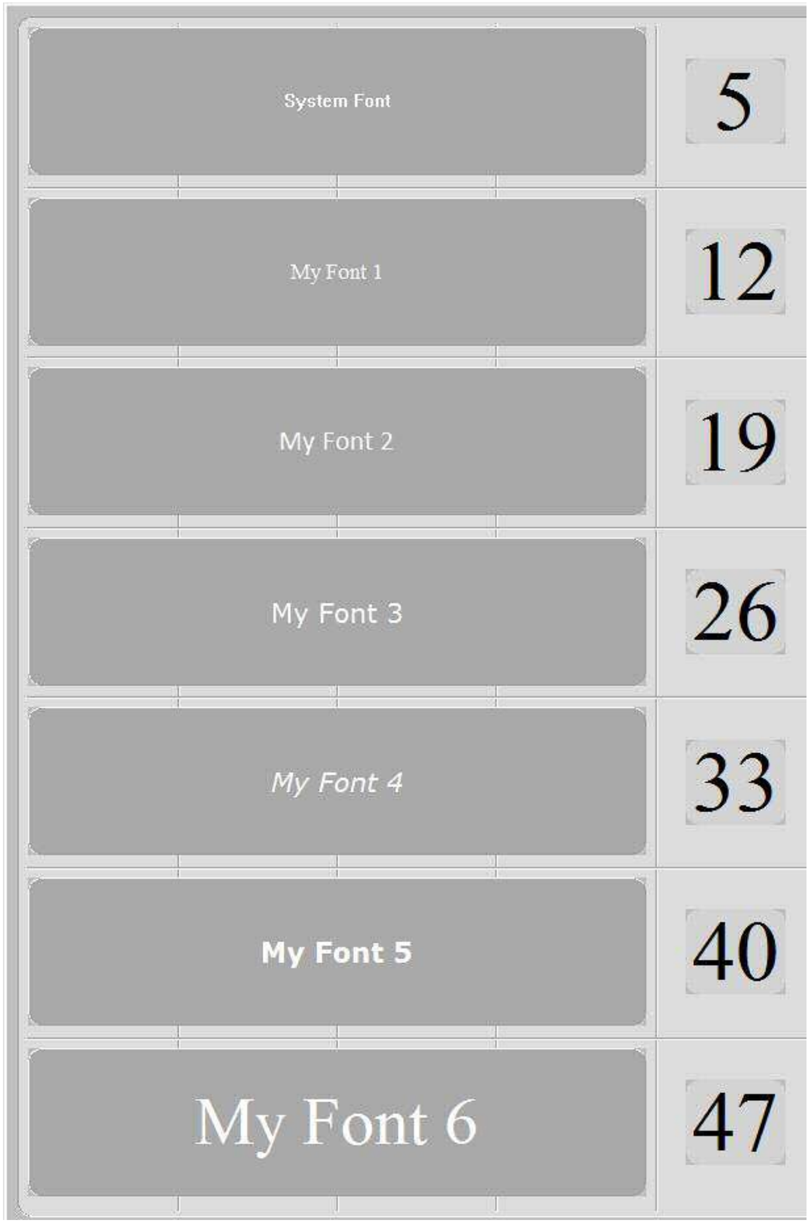
Set the Button Text to “System Font” and the Button Function to “Go to page”. Leave the page set to 0, and then click the close button.

Next click each of the remaining buttons.



Set the text to My Font X (where X is 1 to 6) and then set the Font number to match that. Again set the function as go to page, and then close, and continue with the remaining buttons.

Continue editing each button until you have one button for each font available.



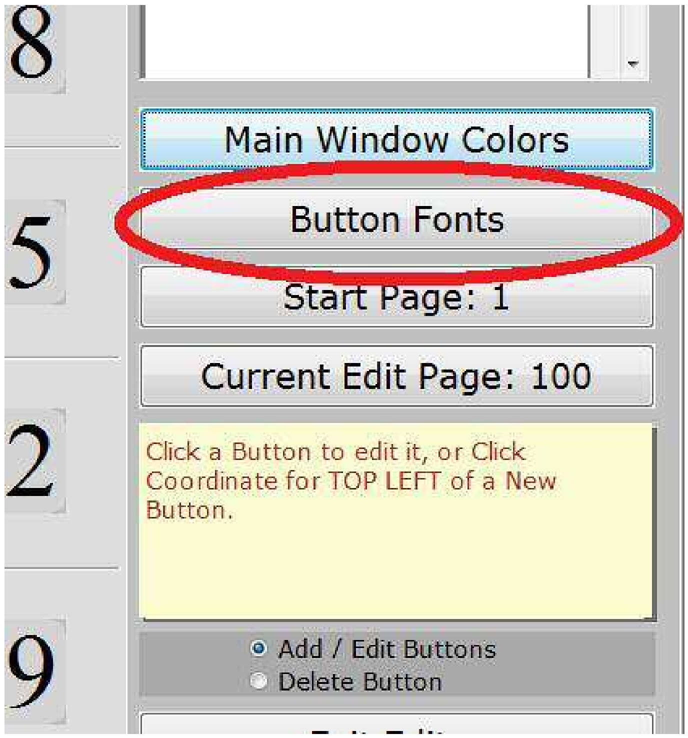
When you have finished, you should see that all 7 buttons are showing different fonts. This makes the next step easy.

The fonts, buttons, and icons all shrink and expand when the app is run on different sized screens, at different resolutions, and different aspect ratios. You don't have to worry about the look changing on different machines, since all of the sizing is handled internally by the POS.

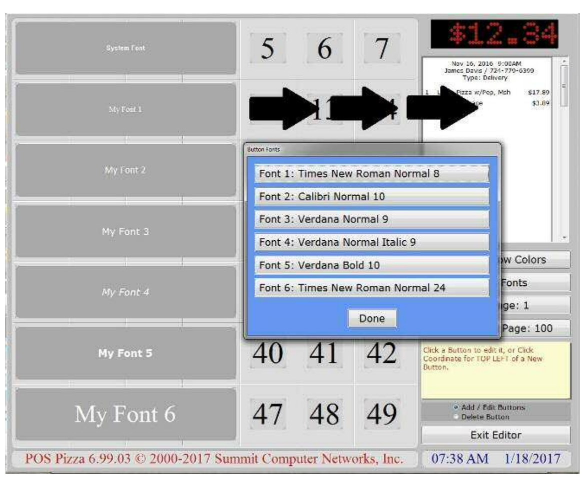
Setting the button fonts

Now we will select our fonts which we want to use for our layout. The system font is changed in the Windows control panel and follows the currently selected windows theme. It is probably best to avoid this font as it can be changed outside of the POS. There are 6 user definable fonts. These fonts are all scaled from 800x600 to fit the screen so 20pt, may be much bigger on higher resolution screens. The overall size will remain constant however no matter what resolution that you run at.

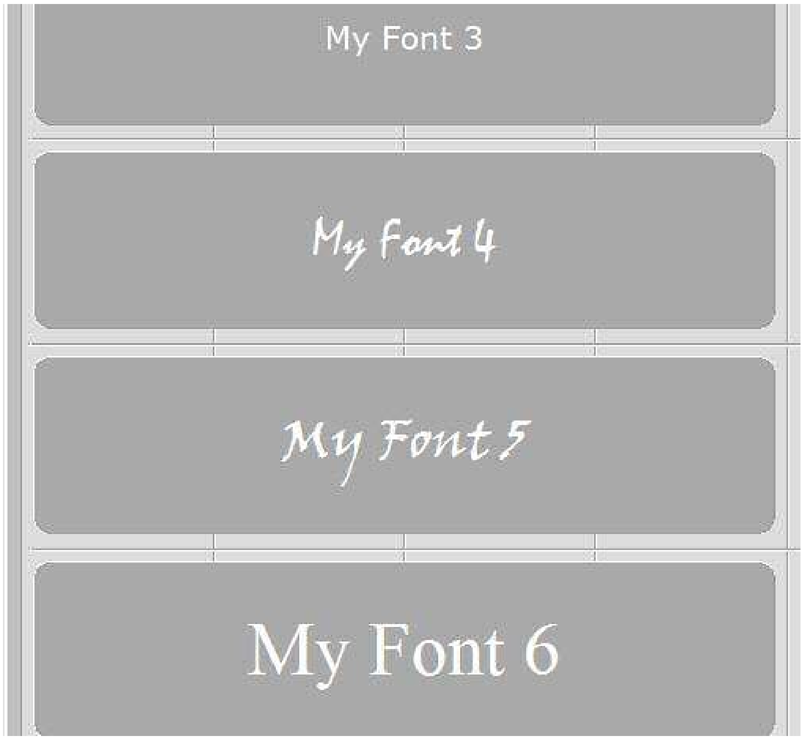
Click the “Button Fonts” button on the right side of the edit window.



This will open the button fonts edit dialog. From here you can choose each font, it’s style, size and other attributes. When you select the font all of the buttons will update showing the currently set fonts. Move the set font window to the right by clicking on the title bar and dragging it to the right. Move it enough so that you can view all 7 of your buttons.



Once the window is moved continue selecting your fonts, and taking notice as to how they look on your buttons. When picking fonts, it is recommended to have at least 1 larger font for labels, and several smaller and medium fonts.

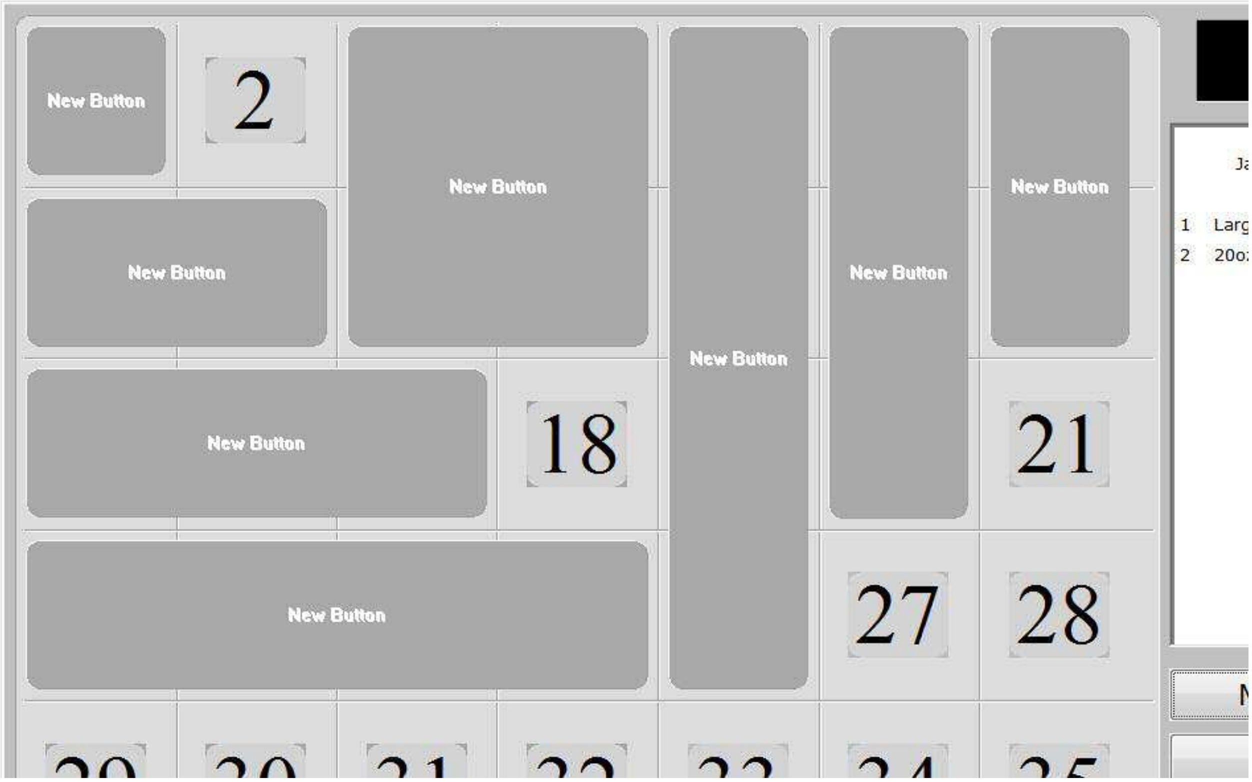


Once your fonts have all been selected, click “done”. Next click the “Exit Editor” button (bottom right), and when promoted to save, answer “YES”!

This will save all of your current buttons, fonts, and all other settings which have been changed during that session. Once you have a starting set of fonts, you can begin thinking about the layout of how your screens should be setup based upon your desired workflow.

Re-launch the Premium POS editor, and continue on the next page.

Buttons can be created anywhere in the cells, in various shapes and sizes.



This gives you a lot of flexibility when designing button pages. You can have pages with only a few larger buttons, or pages with many small buttons, it is up to you.

Next Steps:

Now that we have our button fonts we can begin laying out our actual user work area. You can leave the buttons on page 100 if you want because without any buttons linking to that page, no one will be able to get there except from within the editor. This makes it handy for changing fonts again later.

Go back to page 1. You should be there if you exited and saved and re-entered the editor. If not, you can click the “Current Edit Page: x” button and choose page 1.

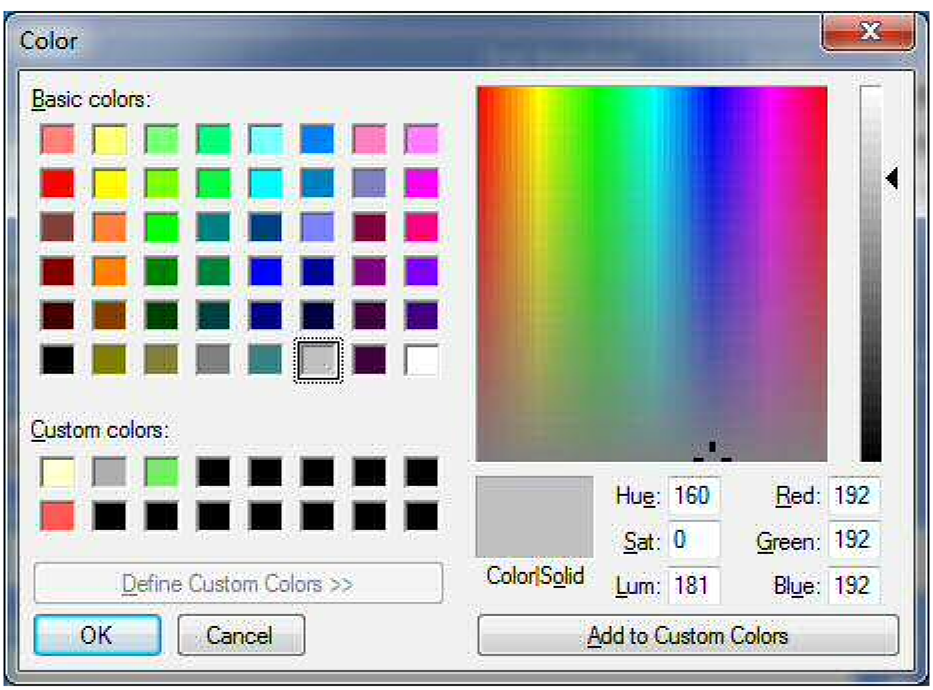
Page 1 is blank, so we will start by creating a label. You can place labels anywhere on the page. For this tutorial we will put it at the bottom. Click area 44, then 48 to create a new button. Next edit this button by clicking on it.

Set the Button Text to “ XYZ Pizza Shop” (note the leading spaces). Next choose an icon, by clicking the yellow "Icon" button. You will see a select icons page like the one pictured below.

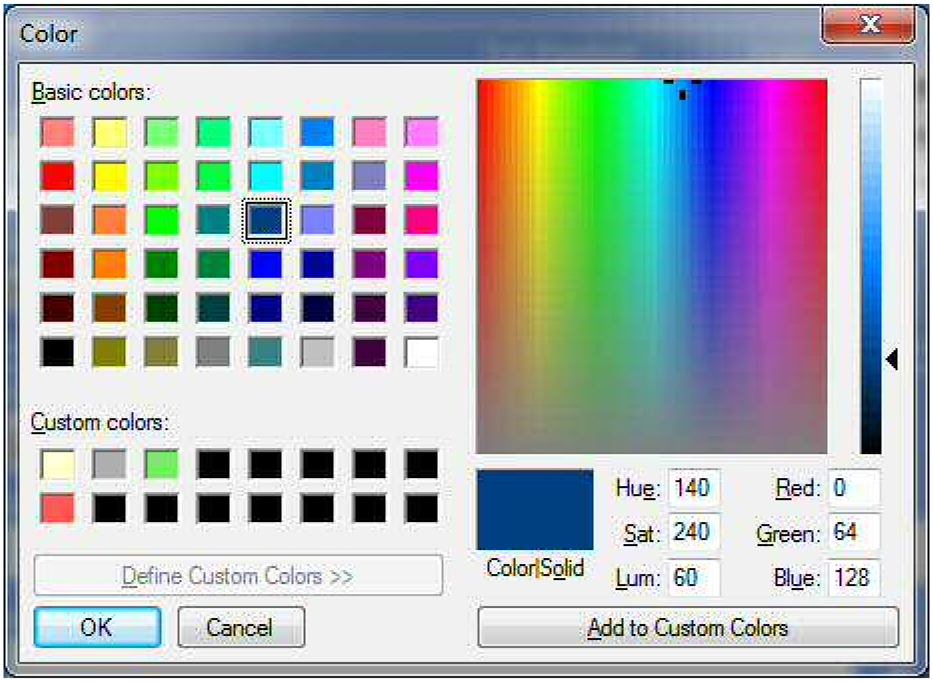
Click on the 4th icon over in the top row (Pizza with a slice cut). The window will close and you will now see this icon in both the button edit window, and on your new button.

HINT: You can add spaces before or after text to position it better on your button.

Next on the button edit window, click the face color. Select the light gray color shown below.



Next choose the text color and choose the “navy blue” color shown below.



Finally select “Label Sunken” from the Button Function list. This should be 1 up from the default “Label Raised” selection. Your button edit window should look like the one below.

Click on close and then click area 43, and then 43 again to create a small button in the lower left corner. This button I setup as "Tools" as a "go to page" button. Later we can setup a tools page with buttons to do things like launch the management utility, or other programs, quick reports, open and close shift, etc.

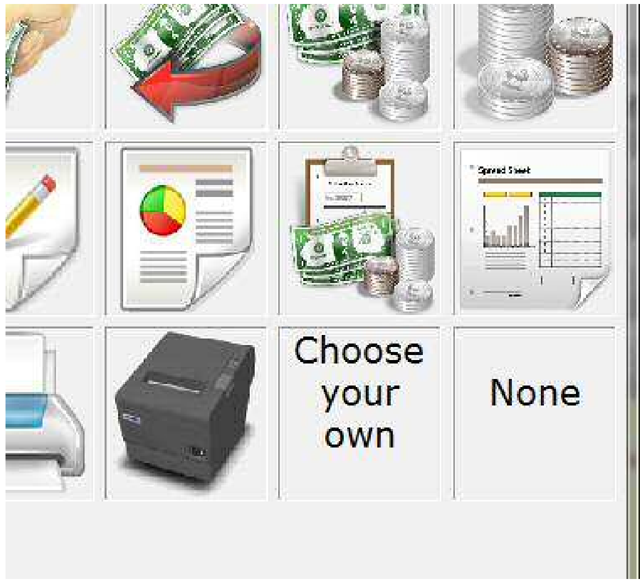
This is what the tools button settings look like for the tools button.

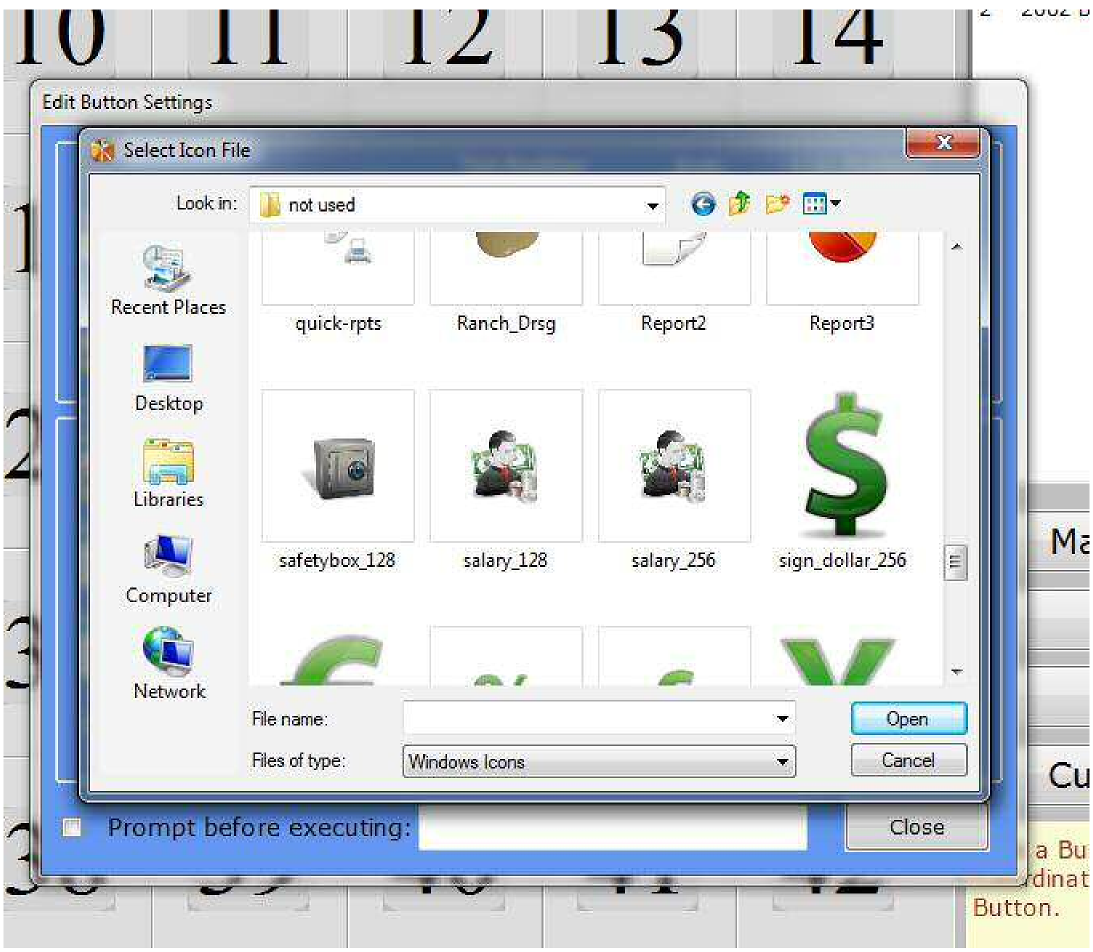
I have set the page as 2, but for safety you should probably always set them to 0 until the page is actually created. If you run the app and go to a page with no way to leave that page, then you are stuck there until you log out, and then log back in again. Select the settings for the tools button, and then click close.

Next click area 49, and then 49 again to create another small button on the right side of our label. This button for our example will settle (cash out) existing orders. For this button, we will use an icon from somewhere on the hard drive. This module allows you to use any standard windows ICO file and assign them to your buttons.

HINT: If you use your own icons, they will be copied to the application folder (C:\POSPizza6\CS or C:\POSPizza6\SA). If you are running the CS version, these icons will also need to be copied to other machines if you are working with the default profile, or a profile which is not for the machine that you are doing your editing on.

To choose an icon from somewhere else, click on the yellow "icon" button from inside of the button editor window. Go to the "Tools" page of the icons, by clicking the radio option at the bottom. On the tools page select "Choose your own" from the bottom row. This will open up a browse for file window, where you can select any icon file on your computer.





After choosing your icon, click the "open" button at the bottom of the select window. You will now see the selected icon appear on both the button that you are editing, and in the button editor.

Set the Button Text to "Settle" and position it at the bottom of the button, and then position the icon at the top and adjust the "Icon Size" so that both the text and icon are easily visible.

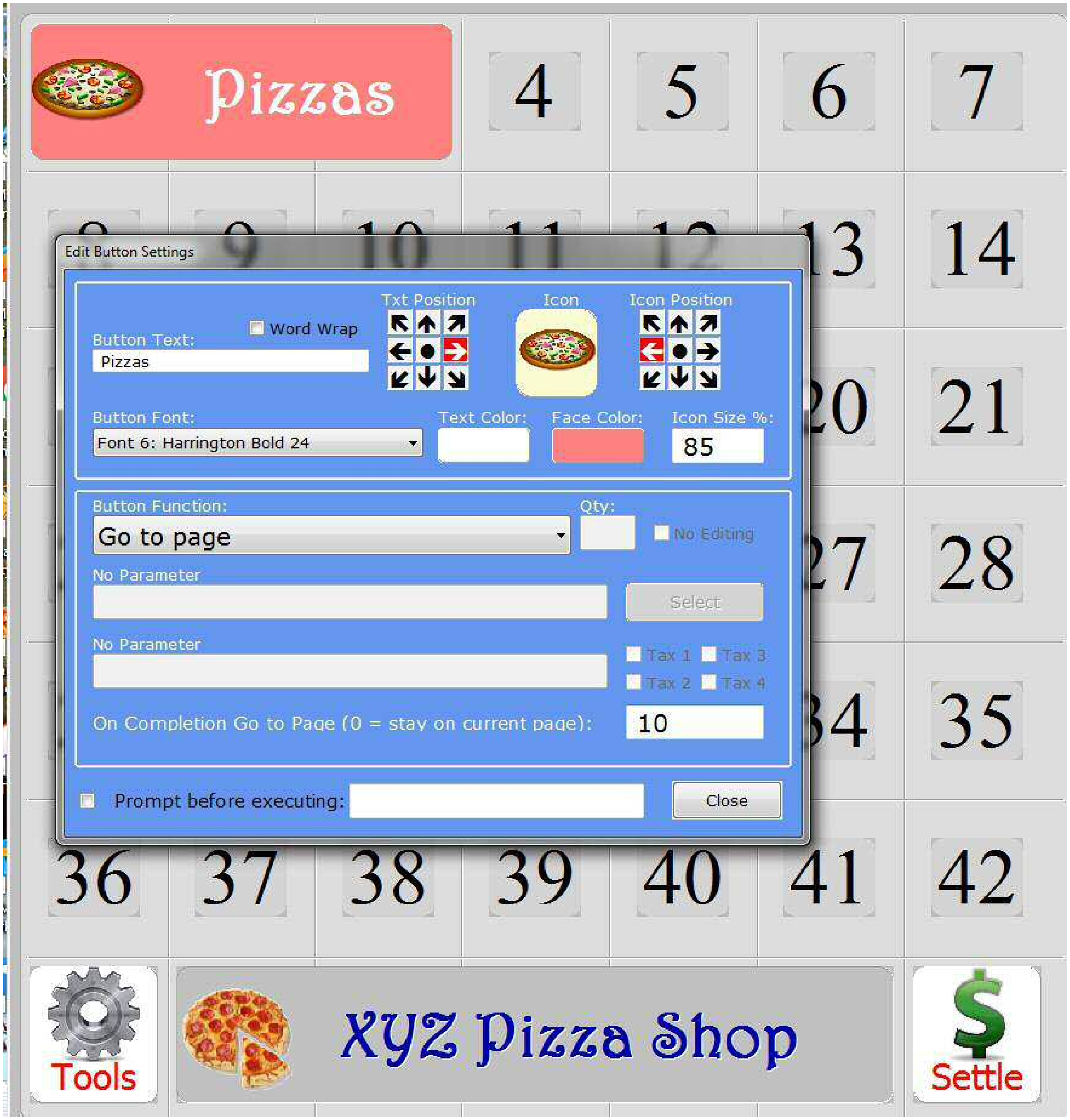
HINT: Icon size is the percentage of the button's smallest dimension. On square buttons both dimensions are the same, so 90% would fill 90% of the rectangular area with the icon.

Continue setting the text and face colors and then select "Cash out/Settle Order" for this button's function. Click Close. Your main screen should look similar to the one pictured below.

Next let’s create some category buttons. These will all be “go to page” buttons. We can put these at the top part of our page. Click area 1, then 3 to create a new button. This will be our first category button “Pizzas”.

Select a button font, and set the button text to “Pizzas” and then position it to the right. Add a few spaces after the letter s (in Pizzas) to get it away from the right edge of the button. Next select the button icon, and position it to the left, and adjust its size as needed. If the font is too big or too small, choose another one that looks good. Finally, set the button’s background color, and a text color that is easy to read on your selected background.

Once the button’s look is finished, select “Go to page” for that button’s function. It is good to leave space between your pages. You can space pages 5 apart or 10 apart or anything else that helps you organize them in your mind. This leaves space to add more pages for a given category, should you later expand your menu. They don’t have to be numbered this way, but it is a little easier to keep track of them. Write down on paper what each page is in your setup, and think about the workflow.


Pizzas
4
5
6
7
Edit Button Settings
Txt Position
Icon
Icon Position
Word Wrap
Button Text:
Pizzas
Button Font:
Font 6: Harrington Bold 24
Text Color:
Face Color:
Icon Size %:
85
Button Function:
Go to page
Qty:
No Editing
No Parameter
Select
No Parameter
Tax 1
Tax 3
Tax 2
Tax 4
On Completion Go to Page (0 = stay on current page):
10
Prompt before executing:
Close
14
21
28
35
36
37
38
39
40
41
42
Tools
XYZ Pizza Shop
Settle

Continue adding categories. The next one we will put in area 5 to 7. If you run out of space for your categories, you can either use smaller buttons, or put a "more…" button which goes to another page full of categories. It is entirely up to you, so decide what works best for your situation.

6 more category buttons were added, along with a more button to go to another page of categories for this tutorial. On this home screen let's continue adding some buttons. Their start-end areas will be shown as xx-yy from here on out.

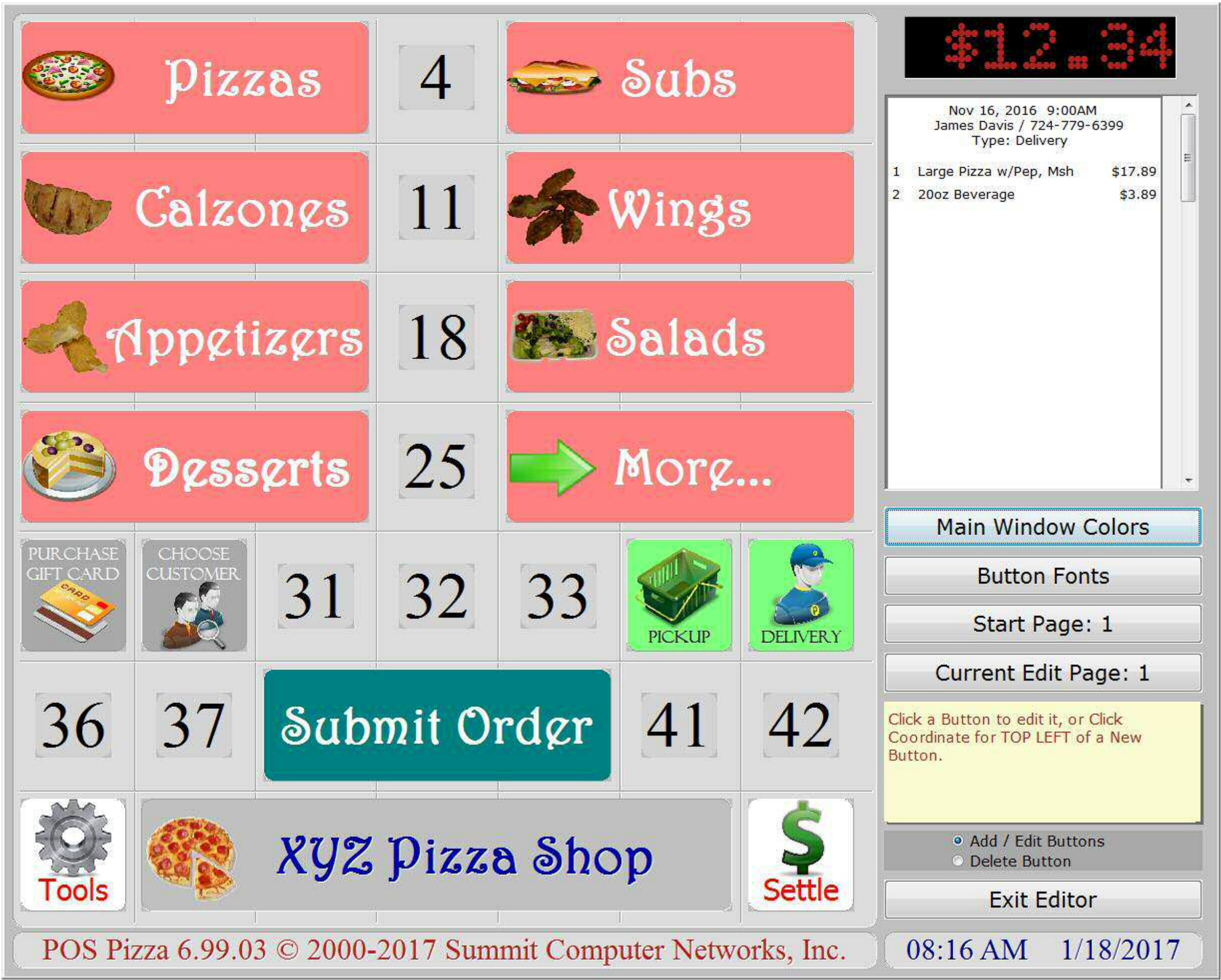
29-29: Purchase Gift Card

30-30: Choose Customer

34-34: Type Pickup (no customer change)

35-35: Type delivery with pick a customer

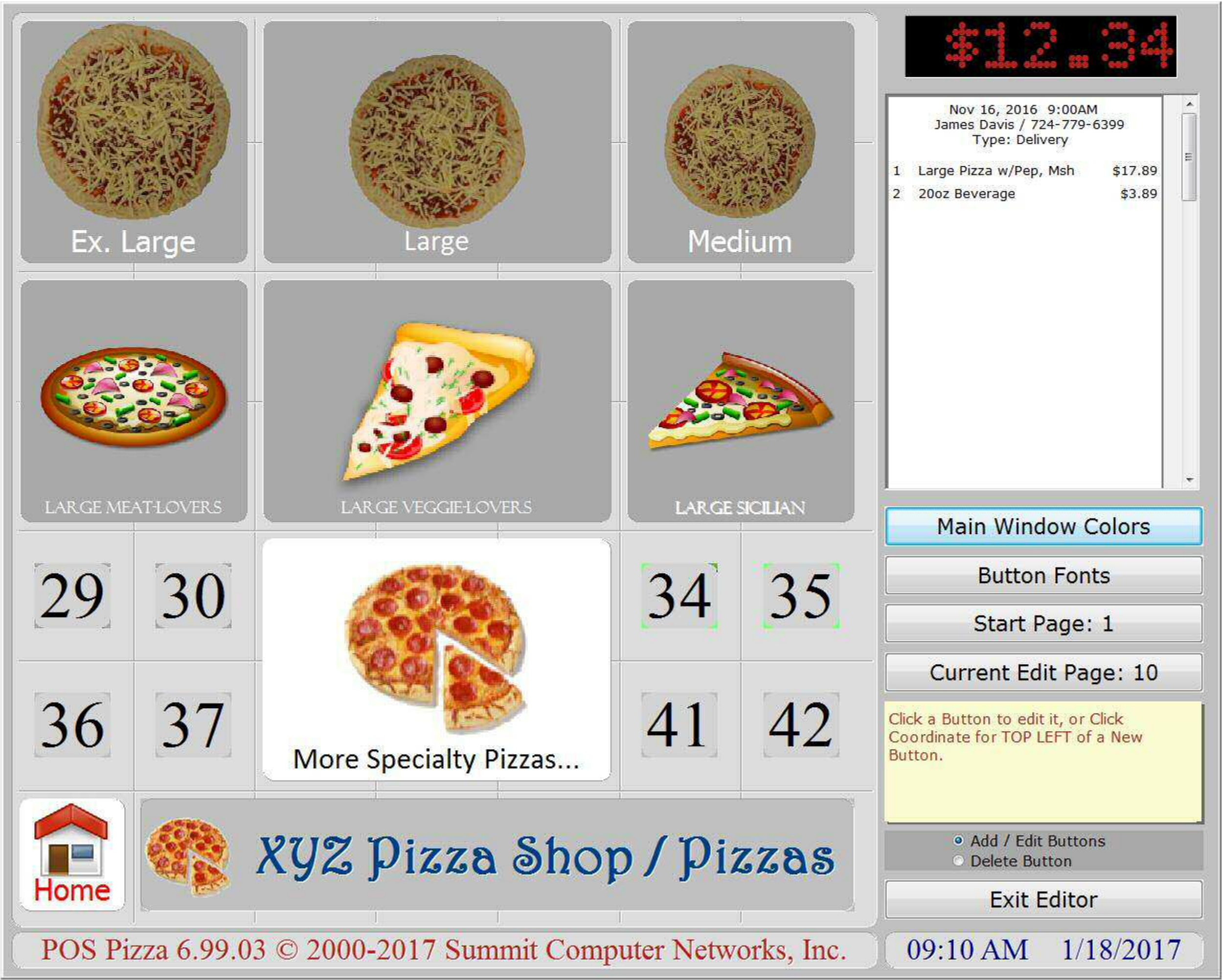
38-40: Submit Order



This is the finished look of our page 1. Next we will work on the Pizzas page (10). Click the Current Edit Page button, and select page 10. This is a blank area, so the first thing that we want to do is create a label, and a “home” button which leads back to page 1. Remember, make sure that you always have a way to get back to the home page.

Create a button in 1-9, and set it to “add item”. Click the “select” button on the button edit page to choose an item that this button will be adding.

Continue adding pizzas with buttons at 3-12, and 6-14. This will create some bigger buttons. Feel free to choose your own style of layout as well. The next screen shows the finished Pizza buttons page.



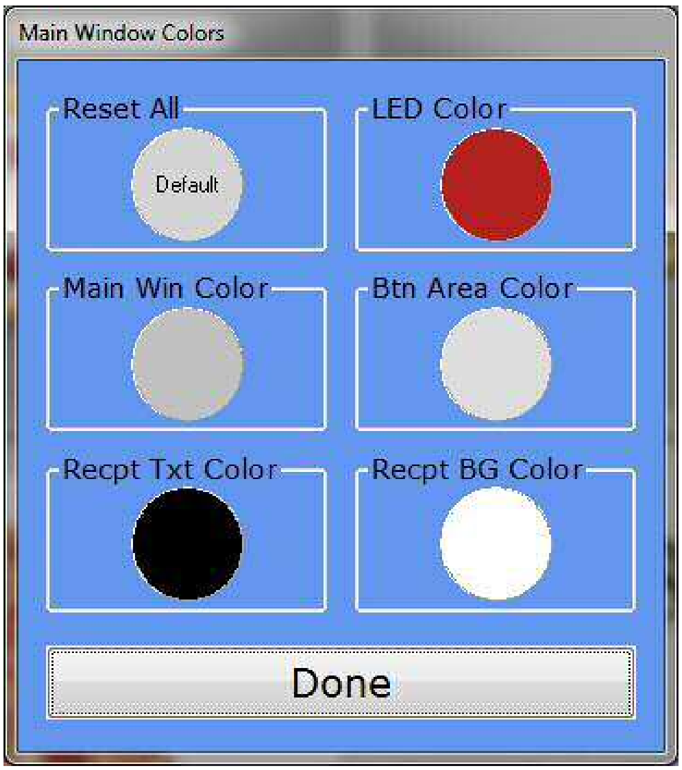
Hint: When adding an item to the order, you may want to have the button also jump back to page 1 immediately after that item is added for a faster workflow. Set the page on the add item button to page 1, or leave it on 0 to remain on the current page.

Hint: You can also add “fixed” non-inventory items using this module. These will add an item to the order which cannot be edited by the cashier. This is nice for a quick-and-dirty way of adding seasonal items or coupons that you don’t care to setup in inventory.

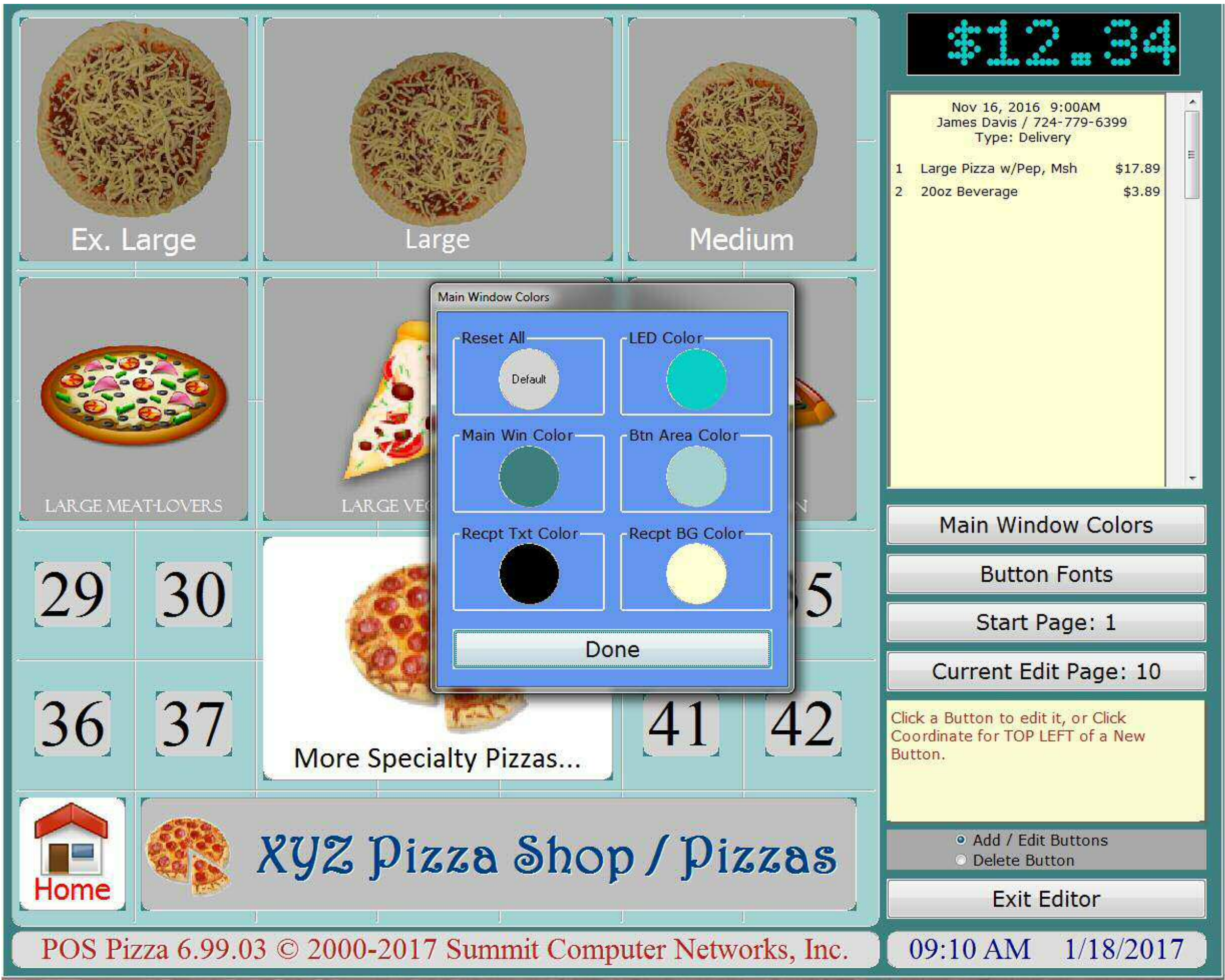
You can continue setting up items and categories, but we are going to talk about the individual settings for the main screen and for the buttons editor in this next section.

Main Screen Options:

On the main screen you can choose the colors for the LED total display, the receipt background and text, and the main window background and the button area background. By default the window is set to grey colors and the LED is a dark red. Click the “Main Window Colors” button to change these colors.



As you set the colors of each item, they will change so that you can see how your color scheme looks. The color settings are saved with each machine profile, so you could have different machines with different colors (and page layouts) on your network.



Anytime that you make changes to the profile, you will always be prompted to save when you exit the editor. If you don't save the changes, all changes made during that session will be lost.

Start Page – Sets the first button page shown after an employee logs in.

Button Options:

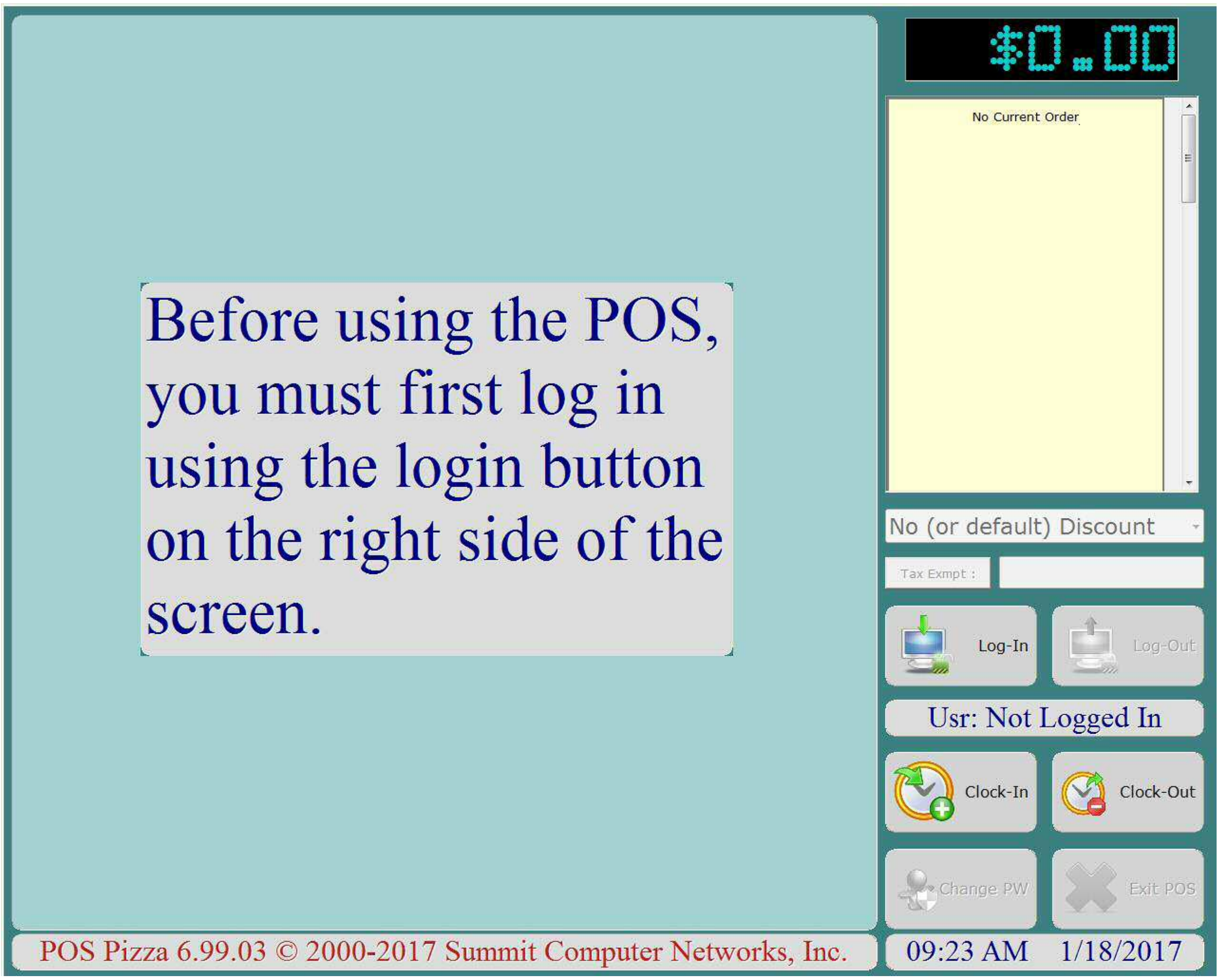
You have already learned about the button's text, text position, font, icon, icon position, icon size, and button functions. Now we will cover some of the other options in the button editor and what they do.

- Qty – Sets an item quantity when adding regular inventory items.
- No Editing – locks the item from being edited once it has been added to the order. It is suggested to not show the modifiers screen on these types of items (set in master items).
- Prompt before executing – This allows you to type in text that will be shown the cashier with a Yes/No choice. If they click No, then the button will not do anything. If they click Yes, then the button will perform it's configured action.

In addition there are 2 parameters fields which will vary depending on the function chosen. Some functions will not need these, while in others they can only be set using the "select" button. For non-inventory items you use these for the item's description and price. For set to walk-in, you can put a default customer name here if you choose. For launch a web site you will put the full URL here. For launch an app you will put the full path to the executable for that app including the exe name.

The user side of the POS module:

When the app is first launched you will see a blank screen (unless you have logins disabled).



Click the Log-In button to log into the module. Once a valid login is entered, the start button page will be displayed (see next image).

The order type will default to whatever the default order type is set to in the Main POS module setup in the management utility. After log in, the person can use the buttons that are presented to them. If they do not have rights to a function, they will be shown a message stating this if they click a button that they are not allowed to use. All of the user rights for the existing POS module carry over to this module.

Let's say that our customer wants a "Large Meat Lovers Pizza" with extra cheese added. The meat lover's pizza is setup so that it does not show modifiers since it is usually taken "as is". This makes adding these types of items much faster.

To edit items on the order, click on the receipt control (top right). This will open an edit window where you can edit, delete, or swap items, as well as choose the order type, show maps, or copy the customer's address.

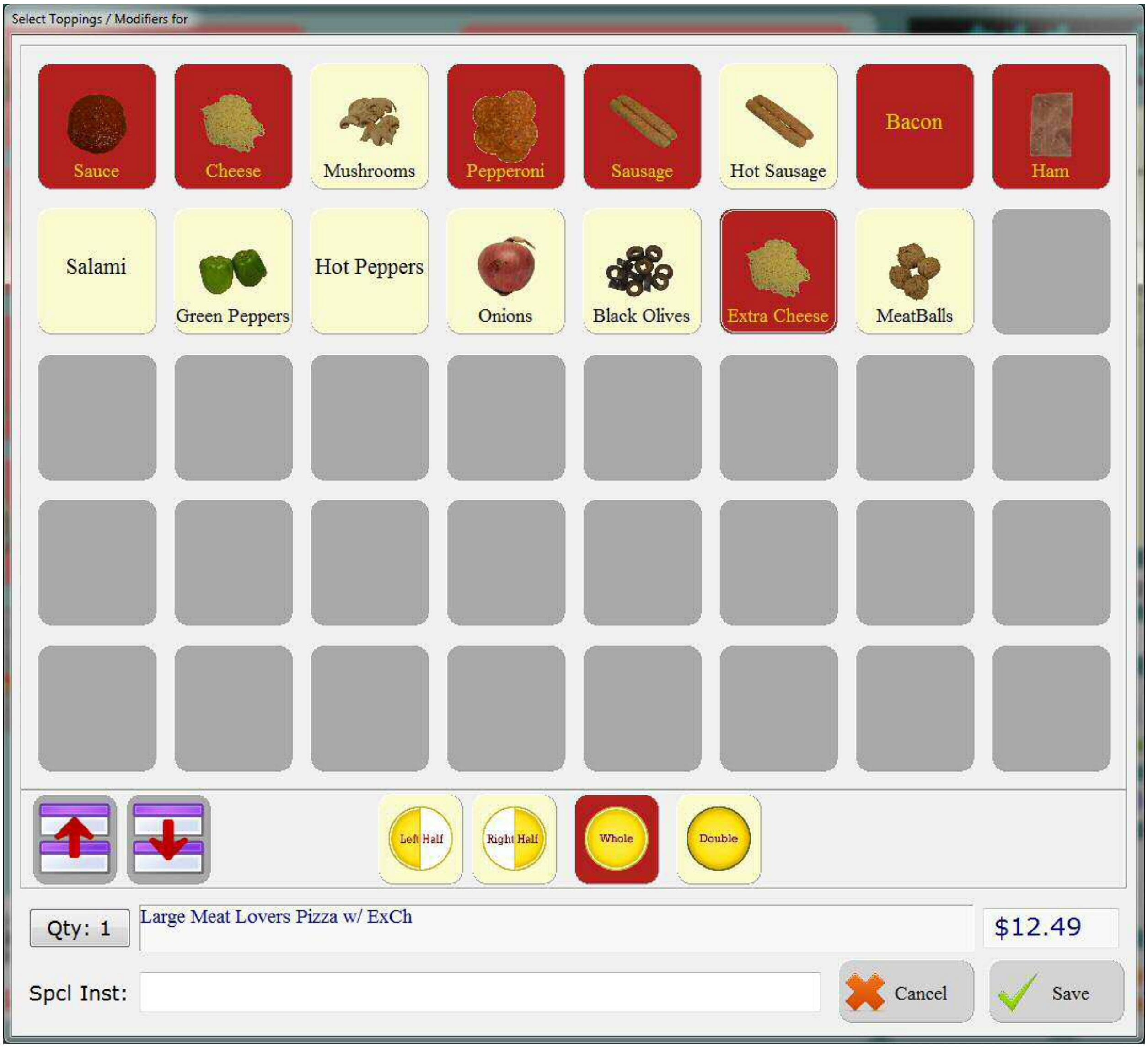
To input our customer's order, click the "Pizzas" button.

We are immediately taken to this page. Click the Large Meat Lovers button.

The item is added directly to the order (no modifiers screen) because that is how it has been setup in the database. We are also returned to the home page immediately because that button was set to take us back to page 1 after it's task was executed. The item is now on the order, and the price set. Next click the "Pickup" button, unless the type is set by default.

Click the receipt, and the edit items window will appear.

We can now either double-click the line item "Large Meat Lovers Pizza" to edit it, or highlight it and click the "Edit Item" button. Either way we will be shown the modifiers screen for that item. We want to add "extra cheese" as the customer requested.



Click "Extra Cheese" and it will be selected and the price updated. Click Save on the modifiers window, and then "Done" on the edit items window. You will now be back at the main screen on page 1.

Click the "Submit Order" button to send the order to the system. This will send the order to the make-lines, and put it into the system, and print any receipts initially setup to print.

The order payment screen will be shown next. You can either take payment right there, or save the order for payment later. When you save for later, you can pay for the order by using the "Settle" button on the home page.

Note: The original modifiers screen is not available in this module. This module uses graphical buttons for all modifiers and items.