

# Welcome

As a Dinerware customer, you are our first priority. It is important to us **you have the best experience possible** using your Dinerware system.

This booklet was designed to help you get set up and running fast.

We continue to post new information on the Dinerware website — valuable tips, guides and short videos that explain how you can get the most out of your system.

Finally, it is a privilege to earn your business. We encourage you to contact us anytime with questions, suggestions or comments. Your voice and patronage are a vital part of what makes your Dinerware software better with every generation.

Again, on behalf of every KnoxGeex employee, welcome! We look forward to a long and successful partnership with you.

Andy Creager, Owner



## **Guides online:**

This customer care kit, video guides and step by step instructions can be downloaded at the KnoxGeex website after requesting access from your dealer:

[www.knoxgeex.com](http://www.knoxgeex.com)

## **Dinerware worldwide headquarters location:**

400 North 34th Street  
Suite 200  
Seattle, WA 98103

(866) 346-3792

# Contents

2

## Setup — The steps to complete the installation

### Site Readiness

Pages 4 — 11

- Internet
- Shielded Cat5 cables
- Merchant account
- Electrical needs
- Onsite construction

### Software Setup

Pages 12 — 16

- Merchant account
- Menu
- Taxes
- Jobs and pay rates
- Employees
- Discounts and voids

### Installation

Page 17

- Construction finished
- Power and cables completed (electric)
- Additional equipment
- Opening day

## Self-Help Basics — Step by step guides

### Maintenance

Pages 18 — 28

- Data backups and archives
- System changes, shut-downs and reboots
- Hardware care, upgrades, power conditioners
- Third-party software

### Troubleshoot

Pages 29 — 32

- Printing tickets
- Credit card processing
- Error messages
- Cash drawer
- Software updates

### User Guides

Pages 33 — 61

- Menu
- Management
- Reports
- Ticket operations
- General

## Extras — Additional reference materials and sources

### PCI-Compliance Basics

Pages 62 — 68

### Glossary of Terms

Pages 69 — 72

### Index and Resources

Pages 73 — 76

# Getting Started

## What happens next?

Congratulations! You are on your way to making one of the best investments you can in your business — a Dinerware point of sale system. Please keep this kit where you and others can easily access it.

*This guide is divided into three sections*

- 1) Setup:** Site readiness, software setup and installation
- 2) Self help:** Maintenance, troubleshooting and guides
- 3) Extras:** PCI basics, glossary and an index

## How to use this kit

In most cases, we install a total system that includes everything you need to run a point of sale system in your restaurant on a daily basis.

This kit is a resource to help you understand and properly use all components that enable your system to work smoothly.

We believe an empowered Dinerware customer leads to confidence in the system. This kit has simple instructions to help you get set up and operational in the most efficient way possible.

We don't expect any customer to be a technical expert, but it is important you and your staff have easy access to answers.

### Setup Contents

#### **Site Readiness**

- Internet
- Shielded Cat5 cables
- Merchant account
- Electrical needs
- Onsite construction

#### **Software Setup**

- Merchant account
- Menu
- Taxes
- Jobs and pay rates
- Employees
- Discounts and voids

#### **Onsite Installation**

- Construction finished
- Powers and cables completed
- Additional equipment
- Final payment

# Setup

4

## Site Readiness

These four areas must be completed before your Dinerware point of sale system can be installed: **internet, cables, merchant account and construction.**

### **Internet tips:**

#### **Connectivity**

Ask us! Check that your Internet Service Provider (ISP) offers a service that meets the recommended bandwidth your system will need.

#### **Location**

Internet must be supplied **at the system router location.** We may need to work directly with your ISP to ensure a correct connection between the internet service and your Dinerware system.

#### **Router**

Internet should be on a dedicated, secured modem **and not through an existing router.** This is a direct connection, so your data can be isolated from other sources that attempt an internet connection.



### 1. INTERNET

#### **Wired, high-speed internet installed**

#### ***Why this is important:***

Wired, high-speed internet provides the most reliable uptime for both your Dinerware system and your payment processing system.

If you choose not to invest in a high-speed and wired internet connection, there is a risk your business will experience higher downtime rates and slower system functionality.

Your Internet Service Provider (ISP) will supply the modem. The **modem** provides internet connectivity. A **router**, typically included in your Dinerware system purchase and installed by your Dinerware installation manager, establishes a secure connection between the modem and your system.

## ✓ 2. CABLES

### Shielded Cat5 cabling installed

#### *Why this is important:*

Shielded Cat5 cables are critical for the reliability of your Dinerware system because data transmitted through regular Cat5 cables is more susceptible to corruption by electromagnetic interference. Fluorescent lights, heaters, other electrical cables and devices are all common sources of interference.

For the best data integrity possible, we strongly recommend you invest in the proper installation of shielded Cat5 cables. This will limit a potential point of failure.

The cabling and other electrical work should be finished before the installation of your new Dinerware system.

#### **Cable tips:**

There are many cables available. Please consult your Dinerware installation manager to ensure you make the best choice for your Dinerware system.

#### **Processor tips:**

##### **Processor selection**

We can help!

Every business has slightly different needs which should be closely considered and discussed with your Dinerware representative, so we can help you find a provider that will best meet your needs.

#### **Payment processor selection — please do not put this off!**

Critical provider details are needed *prior to your Dinerware onsite installation* if credit cards are to be processed at time of Dinerware activation.

# Setup

6

## ✓ 3. MERCHANT ACCOUNT

### Payment processor selection and merchant account activation

#### **Processor tips:**

#### **Parameters**

After you have set up your new merchant account, your payment processor **will contact your Dinerware representative directly** and provide needed technical details.

If your payment processor provides you with technical details, **please contact your Dinerware representative right away.**

#### **Changing processors**

If you already have a merchant account but decide to change processor companies, **please notify us immediately!** We will need to change the necessary technical connections from your old provider to your new provider in the Dinerware software.

#### **Why this is important:**

You will need to select a payment processor company and work with them to set up a merchant account if you plan to accept credit or debit payments from your guests.

The process to create an active merchant account can take **7 - 10 business days** to. This process is known as “on-boarding.”

This is a critical step and can be easily forgotten until the last minute. Dinerware recommends you begin this process as soon as possible to ensure that you will be able to process payments on your first day of business using your new Dinerware system.

It will also take time **after** your account is activated to setup a connection between your new merchant account and your Dinerware software.

After your merchant account has been setup, we will need to know the provider. We work directly with your payment processor to get technical activation details (sometimes called “parameters”) from your provider **prior to the onsite installation.**



## ✓ 4. CONSTRUCTION FINISHED

**Your building contractors and electrical installations are 100% complete**

### *Why this is important:*

Most point of sale equipment *is* rugged and designed to withstand extreme conditions in hospitality environments, **but it is still a computer system running complex software.**

We understand vendors may run late but don't be tempted to schedule your Dinerware computer installation before the other contractors are finished.

If you detect any vendors will be behind schedule, please contact your Dinerware installation manager to reschedule. It is important, for the protection of your new computer and software setup, that Dinerware be installed last.

To ensure your Dinerware installation will not require multiple site visits, the following two pages show images of a "ready" and "not-ready" restaurant site. This can help you determine if your establishment is "ready" for a point of sale computer system installation.

### **Contractor tip:**

#### **Schedules**

Check in with your vendors regularly and ask how any schedule changes will affect the specific tasks of your other vendors.

#### **Finished site**

Debris, accidents or mistakes common at construction sites create predictable risk for your business computer — the point of sale system.

We never recommend to install a computer system where construction is still underway or if the electrician or network personnel are still configuring power or drilling holes.

If you notice any areas of your site that do not meet these guidelines, **please contact us as soon as possible to reschedule.**



# Setup

8

## How to determine if your restaurant is ready for the Dinerware installation

The following is a comparison to help you easily and quickly identify onsite areas which are either “ready” or “not ready” for your computer system installation.

### Counter

Complete, clear, no dust, no wet paint

### Power

Dedicated outlet

Shielded Cat5  
Mounted Cat5e  
jack



# READY!

✓ **Power complete, holes drilled**

Dinerware systems require a 2-inch grommet hole drilled near any power inputs (power, Cat5) **installed below a counter**. Without this hole, the Dinerware installer cannot run necessary POS cables.

✓ **Construction complete**

Your Dinerware system must be installed in a dust-free environment. The more unfinished construction, the greater risk your system may not perform as intended.

✓ **Internet installed**

Wired, high-speed Internet is already installed and functioning.

✓ **Cat5 cables installed, networking finished**

All necessary Cat5 cables are run and installed properly.

✓ **Countertops dust-free, completed, proper size**

Countertops for POS locations must be 100% complete (finished).





Dust, wet paint,  
dropcloths, floors  
unfinished

Counter  
Unfinished

Power  
not started,  
no outlets



**NOT READY!**

❌ **Construction incomplete**

Construction can get delayed. Please call us if you feel construction will extend into the point of sale installation schedule.

❌ **Countertops, POS areas unfinished**

Installation of a Dinerware POS system, even temporarily, on the floor is not permitted.

❌ **Cat5 cabling, power or networking unfinished**

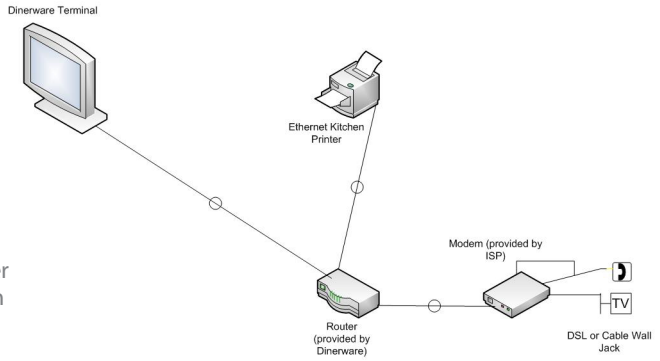
Mistakes happen that can impact your Dinerware system: unplugging or moving point of sale systems, forgetting to drill holes for the POS system cables, or inadvertent or unintended network resets for the Dinerware system. It's important for your vendors' work to be complete *before* the installation of your new Dinerware system.

❌ **Missing dedicated power outlets, unfinished wall jacks**

These elements are critical to have in place and be completed before your Dinerware system is installed.



## Single Terminal Wiring Diagram



10

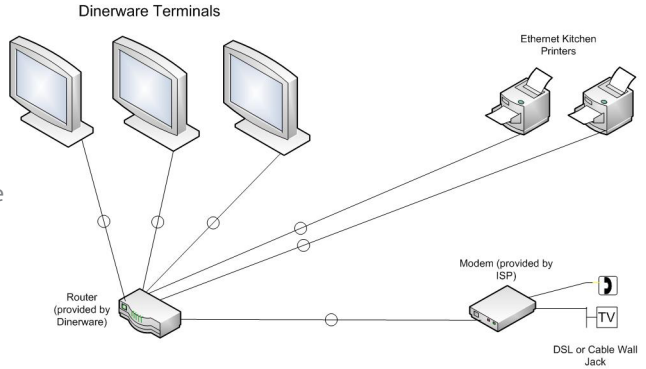
### Networking Notes

These simple diagrams are based on the number of terminals for common POS system setups\*.

This will help your electrician, cable installer and internet service provider understand how your new Dinerware system will be set up.



## 2-3 Terminal Wiring Diagram



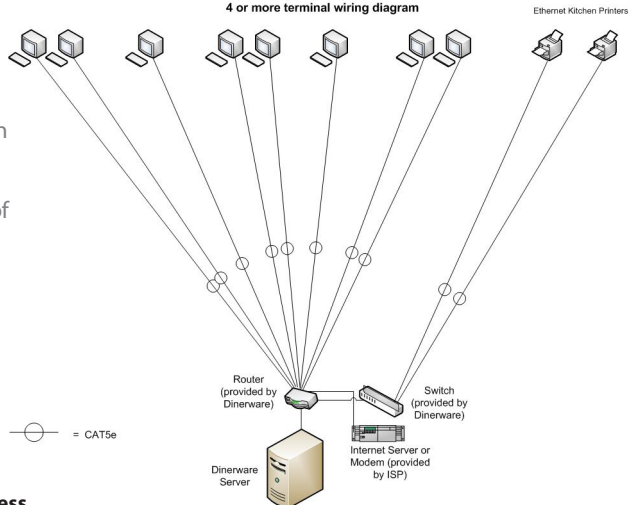
### Why using a licensed electrician is critical

Improper setup of electricity can affect more than just your Dinerware system.

Sudden power changes, incorrect wiring or unaddressed voltage issues can ruin internal components of any dependent systems.



## 4 or more terminal wiring diagram



Data on computers can be corrupted and unrecoverable.

If your licensed electrician recommends investing in a surge protection system, ask about the risks of forgoing this option.

\*A network diagram for your site should be included, folded in the pocket of this guide.

## Special Notes:

### Site readiness | Pre-installation list for do-it-yourself (DIY)

These items must already be in place first before any computer (point of sale system) can be installed. Once these steps are complete, your business is ready for the **installation** of your new Dinerware system.

- Electricity and cables should be installed by a licensed electrician or cabling contractor
- An electrical outlet must be supplied at **each point of sale station** or terminal, and an electrical outlet must be supplied at the kitchen printer location
- Ethernet cable must be run from each terminal station to the router (internet) location
- Wired, high-speed internet must be supplied at the system router location, and **the router must be used only for your Dinerware system**
- There must be adequate counter space available (see hardware guide for system dimensions\*) for your Dinerware system
- All old systems must be **removed from the area** prior to setup
- Under-counter wiring: the countertop must have a grommet hole drilled at least 2" (two inches) in diameter
- Construction must be finished** before your Dinerware system installation.

Please refer to the **'Ready vs Not Ready'** section of this guide for more details and tips about preparing your location for a Dinerware POS system installation.

*\*Your Dinerware hardware specifications should be included, folded in the pocket of this guide.*

- Use power conditioners and outlets within their recommended limits
- Only use hardware that meets the system requirements
- Contact us before you install any 3rd party software on the Dinerware system
- If you do not understand the system requirements and hardware requirements, please contact us first before you purchase
- After your pre-install checklist is complete, this is an ideal time to confirm with your Dinerware representative your support plan and training packages if you have not already done so
- To setup your support and training packages, contact us now to ensure timely scheduling of your staff in advance of your opening date

# Setup

12

## Setup

### Software setup

#### *Schedule tip!*

Please provide the items listed in the software setup section to your Dinerware representative well in advance of your opening date.

We recommend a minimum of **two weeks prior** to your installation date.

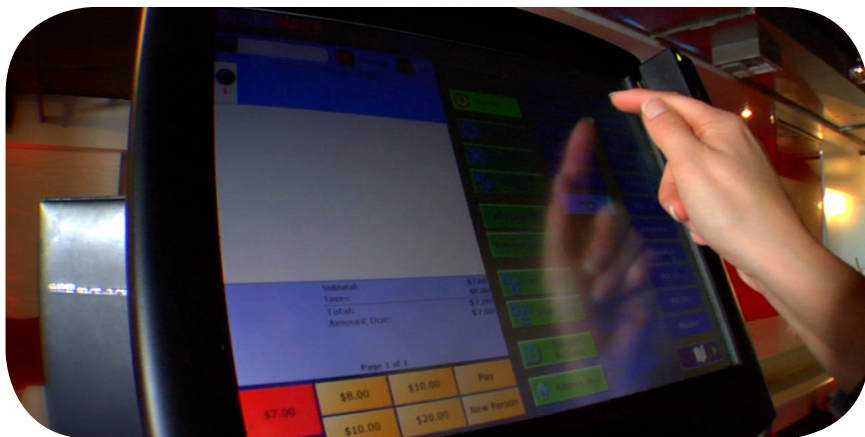
This ensures a level of quality satisfaction and peace of mind for any restaurateur prior to opening day, and will enable your Dinerware trainer to focus on training your staff instead of spending that time programming your menu.

Think of this as more than just technical configuration — the Dinerware software should mirror many areas of your business, because in the most basic sense, your business computer.

There are a few aspects of your business software and processes to consider and organize before your Dinerware system will be installed.

Dinerware software will need to be setup **two weeks prior** to the physical site installation with this information:

- 1) **Credit Card Merchant Account**
- 2) **Menu, Jobs, Employees, Discounts, Voids**
- 3) **Backup Hours / Hours Open**



☑ **1. MERCHANT ACCOUNT SYSTEM SYNCH**  
**Technical parameters setup in Dinerware**

On page 6 of the **Setup: Site Readiness** section, we recommended you complete the process of selecting a payment processor company and that you work directly with the processor to setup your merchant account.

*Why this is important:*

After your merchant account is setup, your Dinerware installation manager will work directly with the processor company.

We will work on your behalf to get the necessary technical information so your Dinerware software can be setup to **accept** and **then transmit** your guest credit or debit card payments to your merchant account.



# Setup

14

## 2. MENU, JOBS, EMPLOYEES, DISCOUNTS AND VOIDS

Please provide your menu, job types and payrates, employees, discount and voids to your Dinerware representative.

### *Why this is important:*

Your Dinerware representative will need to know the following details in order to customize the Dinerware software for your establishment.

## Menu checklist

### Screen categories

*Segments of the menu:*  
Appetizers, Soups and Salads,  
Lunch Entrees, Desserts, Vodka,  
Rum, Beer, Draft Beer, Red Wine,  
etc.

### Menu items

Cheeseburger, Caesar Salad,  
Chicken Strips Entrée

### Item groups

*Similar to 'screen categories,' group  
these menu items for reporting  
purposes:*  
Lunch Entrees, Well Liquor, Call  
Liquor, Appetizers

### Choice sets

*A group of modifiers:*  
Temperature, Salad Dressing, Bar  
Mods, Add, No, Sub

### Choices

*Individual menu item modifiers:*  
Rare, Medium Rare, Ranch, Blue  
Cheese, Bacon, Nuts, Onions,  
Cheese

### *Menu — Related items*

### Taxes

*State sales tax, etc.:*  
Depending on your location,  
additional taxes may apply, such  
as meal. Consult your CPA for  
taxes you will need setup in your  
Dinerware system

### Revenue classes

*Food, Beer, Wine, Liquor, Gift  
Cards/Certificates, Retail*  
Decide quantity and type of  
revenue classes

## Jobs

- Define job types**  
Types of jobs, like cashier, bartender, dishwasher.
- Pay rate for each job**  
List next to each job the accompanying base rate of pay for that job.

## Employees

- Screen name**  
This is the name of the employee that will print on guest checks. Keep in mind your customers will see this name.
- Job or jobs that can be assigned**  
These are jobs to which any employee can be assigned. In many cases, employees can be assigned more than one job.
- First and last names**  
This is what appears for accounting and payroll purposes.
- Employee PINs**  
Each employee must be assigned a Personal Identification Number (PIN) to enable system tracking of an individual's activities performed within the software. This is the unique number each employee will use to access the Dinerware system.

## Discounts and Voids

- Happy hour**  
Please provide a list of items and discount happy hour prices, including time of day and days.
- Employees**  
There may be several types of discounts for employees, such as on-shift meals.
- Neighborhood**  
Some restaurateurs give other local businesses courtesy discounts.
- Friends and family**
- Out of stock, accidental ring in, accidental order made, tests (for training)**

# Setup

16

## 3. HOURS OF OPERATION

Please provide intended hours and days of operation to your Dinerware installation manager, and preferred time of day for system backups to be performed

### *Why this is important:*

Windows software is manufactured with a default setting of Pacific Time, so the person setting up your system should change the default Windows system time clock on every workstation and the Dinerware brain.

## Designate a back up time of day, day of the week

Indicate what time of day is best to schedule your automatic backups.

Your Dinerware installation manager will program this information into the Dinerware system before the installation date.







# Setup

## Onsite Dinerware installation

Congratulations! Your restaurant environment is now “ready” — the construction is finished, your merchant account is activated, wired internet is installed, and you submitted your Dinerware software setup needs.

**Please contact your Dinerware installation manager to confirm your location is ready for installation. Please also reconfirm your opening date.**

### *If I decide I need more equipment, will it delay the Dinerware installation?*

At this time provide any last minute changes to your Dinerware account and installation managers. It is common for customers to take a second look at their layout and decide to purchase a printer or even an additional Dinerware terminal. We recommend you survey your finished site and reconsider your traffic flow and anticipated staff work areas. Sometimes a finished site is different than the original plan.

### *How long will my installation take?*

The length of Dinerware system installations vary widely and are dependant on several factors including size, location, makeup of site construction, extra equipment purchases, and the current Dinerware installation schedule. Check with your Dinerware installation manager for an estimate.

### *What if I can't be onsite for the installation and final payment?*

Final payment is due at the time of the Dinerware system install (ask your Dinerware representative for details). If possible, leave final payment with the staff member that will be onsite at time of installation. Lack of payment may result in an inactive Dinerware software license.

# Self Help

18

## Self Help Contents

### **Maintenance**

- Database backups and archives
- System changes, shut-downs and reboots
- Hardware care, upgrades, power conditioners
- Third-party software

### **Troubleshoot**

- Printing tickets
- Credit card processing
- Error messages
- Cash drawer
- Software updates

### **User Guides**

- Menu
- Management
- Reports
- Ticket operations
- General

## Maintenance

### Tips to extend the life of your Dinerware system

The self-help section offers three types of information: maintenance, troubleshooting tips and user guides.

#### 1. DATABASE BACKUPS AND ARCHIVES

**Safeguard your data through regular backups and when necessary, archive creation.**

#### *Why this is important:*

There are several reasons to backup your Dinerware system data: theft, accidents, flood and hardware failure.

Dinerware software enables managers to easily and regularly backup data. We recommend backups become a standard routine every week, generally when you perform other closing duties.

Data archiving is different and more complex than manual backups. **Archiving involves steps that, once activated, cannot be**

**undone.** We strongly recommend to first consult your Dinerware technical representative before you initiate any archive activities.

**We strongly recommend regular database backups: automated and manual**

Backups can be created in two ways: an automated backup that your Dinerware installation manager will setup prior to your system onsite installation, and manual backups which you can create on your own.

**Two types of backups** impact your system in different ways:

1. Automated backups **overwrite the existing database**, which helps limit the amount of hard drive space used
2. Manual backup process **creates a new, separate database**, and as a consequence, larger file on the hard drive

We strongly recommend you keep current database copies and delete older versions to keep from prematurely filling up your hard drive with multiple copies.

**How to manually backup Dinerware data:**

- Select **'Manager'** and touch **'Exit'** then **'Yes'** to exit out of the Workstation
- You should see the Dinerware Brain screen
- Choose **'Backup'**



# Self Help

20

**Note:** The date, location and name of the last backup is listed.

That's it — you have just manually backed up your data.

## About Dinerware database archiving

**Critical warning! We strongly recommend you first consult your Dinerware technical support resource BEFORE archiving your data.**

Once your Dinerware data has been archived, **sales and labor data is removed from the "live" database. This cannot be undone.** Archiving should **ONLY** be used when necessary and with the guidance or direction of a Dinerware technical resource or an authorized dealer.

### ***How to archive data in Dinerware:***

- Select '**Manager**' and touch '**Exit**' then '**Yes**'
- You have exited out of the Workstation and should see the main screen of the Dinerware Brain
- Choose '**Archive Data**'

The Archive screen allows you to choose a specific date prior to which all data will be archived



- Choose a **date**, then touch **'Start Archiving'**

Once a database has been archived, reports can be run against the archived data. Just select that database on a per-report basis.

**Copy your backup to an outside source, such as a thumb drive or jump drive**

***How to copy your backup data to another source (this action requires a thumb or jump drive):***

- Select **'Manager'** and touch **'Exit'** then **'Yes'**
- You have exited out of the Workstation and should see the main screen of the Dinerware Brain
- In the lower left corner of the terminal screen, touch **'Start'** which will prompt a new window to appear
- Touch **'My Computer'** and double tap the "c:" drive located under the heading Hard Disk Drive
- Select **'Open Folder to View Files Using Windows Explorer'** which opens a new window
- Find the desired backup file (this should appear with a .bak at the end of the file name)

**Note:** If you have not previously performed a backup, you need to first perform a manual backup in order to have a file to select.

***Critical!***

Do not unplug the power cord or press the power button.

Sudden power changes can ruin internal components and corrupt data.

***Shutdown sequence:***

An easy rule to follow for proper shutdown of your Dinerware system is:

**Software — FIRST  
Equipment — LAST**

# Self Help

22

**At this time, insert a thumb or jump drive into the terminal.**

**The input jack for this is usually located up under the face of the terminal.** (This is not located under the pedestal base that rests on the cash drawer or counter.)

- A new window on your screen will open which shows what is currently loaded onto the thumb or jump drive
- Drag a corner of both windows to make the transfer of your backup .bak file to your thumb or jump drive
- Touch to select the desired backup file (this should appear with a .bak at the end of the file name) and holding your finger down, drag the file into the thumb or jump drive window

## **Critical!**

Be sure to shut down each Dinerware workstation **before** you shut down the Dinerware brain.

After all workstation software and the brain software has been shutdown, turn off the physical terminal equipment.

Please make sure to only turn off your equipment **after** the software has been properly shutdown.

If you have a mouse plugged into the terminal the directions are similar:

- Use your mouse, and **right click** on the desired backup .bak file and select '**Send To**' look for the thumb or jump drive and click on the name



## 2. REBOOTS, SHUTDOWNS AND SYSTEM CHANGES

### System reboots help your system operate normally

#### *Why this is important:*

Dinerware is software that is installed on a Windows-based computer (often referred to as a terminal). Windows-based operating systems perform best when they are rebooted regularly.

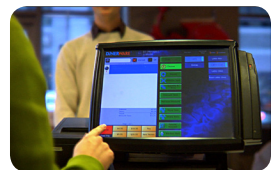
What may appear to be a problem with Dinerware software is often a Windows performance issue. Regular system-wide reboots help resolve general system slowdowns.

### Regularly shutdown your Dinerware system

#### *How to properly shutdown your system:*

- Select **'Manager'** and touch **'Exit'** then **'Yes'**
- You have exited out of the Workstation and should see the main screen of the Dinerware Brain. Choose **'Exit'** then touch **'Yes'** which confirms you want to shutdown the entire Dinerware software system

After all Dinerware software has been exited and safely shutdown, locate the power but-



# Self Help

24

## How to test a printer

Login to Dinerware

Touch **'Manager'** then choose **'Select Printers'**

Highlight the specific printer(s) and choose **'Test Print'**

This will send a test ticket to the selected printer

### **Critical!**

It is possible your system may appear to work normally, but **if the power conditioners are overloaded, your system may fail and render your data unrecoverable.**

Please consult your Dinerware installation manager and only plug in those items as instructed.

ton for your terminal and hold it down until the system shuts itself off.

If your system is unresponsive and you cannot shutdown the software, you must perform a **"hard reboot."** If this is the case, hold down the power button until the system shuts itself off.

## 3. EQUIPMENT CARE, SOURCES AND ADDITIONS

**Every equipment manufacturer provides a warranty for the equipment. These warranties assume some level of care provided by the owners and users.**

### *Why this is important:*

Equipment manufacturers often include disclaimers in the specific unit warranty. There are simple steps you can take to ensure you operate and care for the equipment properly. Consult your individual warranties for specific details.

## **Do not overload power conditioners!**

Over time, your staff may be tempted to attach an extension cord with additional outlets to the outlet being provided to your power conditioners.



If you overload the system, you can limit the amount of required power needed to make your computer run properly. This may cause physical damage to your equipment.

**Please do not move or unplug the system!**

**Please do not move, disconnect or otherwise alter how your Dinerware equipment was installed.**

When, if ever, the need arises to move a terminal **please contact us** so we may place the computer in the best location.

**Protect your system with routine cleaning and keep your equipment free of obstructions and abuse**

Your Dinerware system is a computer networking system and cannot stand up to the same rigors other restaurant equipment can, such as ovens or dishwashers.

**Keep your equipment clean**

**Clean the printer.** Paper dust, dirt and grime can inhibit your printer from operating at peak performance. Periodically open the printer and wipe down the inside with a dry, clean cloth — **never use a moist towel.**

***Critical!***

**Please keep heat and liquid away from your Dinerware system.**

The system will be professionally installed and placed in the most advantageous position to help your restaurant run smoothly and away from the high risk areas that exist in a restaurant environment.



# Self Help

26

**Clean the credit card reader (MSR).** The MSR can get a buildup of residue so we recommend you clean it weekly to help keep the credit card reader working efficiently.

Use a thin towel, with a little bit of rubbing alcohol, and wrap it around a card. Run the card through the MSR two or three times.

**Clean the screen.** The touch screen needs to be kept clean to work properly. Use a glass cleaner to wipe the screen down regularly, **never use bleach**, glass cleaner only.

**Do not change printer settings!**  
**(Please instruct your staff to do the same)**

Your Dinerware installer will set your printers up correctly during the installation process. It is important that you not attempt to make any adjustments to them. This could result in items not printing to their correct printer or not printing at all.

If you are experiencing issues with printing and are unsure what to do, please contact your Dinerware Support department.

**Check with your Dinerware representative about system requirements before you add, move or remove any equipment**

Always contact your Dinerware account manager and ask about changes you want to



make to your Dinerware equipment.

Ask for a copy of the current Dinerware system hardware requirements **prior to purchasing any additional equipment.**

Dinerware software has specific hardware requirements in order to operate as intended.

Depending on your comfort level and understanding of technical requirements, we typically recommend you purchase equipment through your authorized dealer.

This will ensure the new equipment will adequately meet the software requirements.

**Do not add any other software to your system unless you are an advanced computer user**

If a third-party software is not compatible, your Dinerware system may not function correctly. Please consult your Dinerware account manager to learn what third-party software has been certified and is available.

Dinerware software is an open platform. It is "open" to allow most third-party software to operate with it.

Dinerware software developers intentionally made the software to be open, so customers could choose whatever extra software options make sense as their business grows.

***Did you know?***

Customers are surprised to learn that running behind the Dinerware software is a Windows-based operating system.

Your Dinerware installation manager will setup protective measures, such as secured firewall on your Dinerware system.

However, unless you carefully locked down internet connectivity and access, it is possible for your staff to get online on the internet and download third-party products.

Accessing the internet via Dinerware, to check email for instance, is also a common way **computer viruses can be inadvertently downloaded onto, and negatively affect your system.**



# Self Help

28

Not all software is developed the same way, and this is why we strongly recommend you consult your Dinerware technical manager before downloading additional, third-party software onto your Dinerware terminal.

**Don't make any major changes to your Dinerware system before your busiest days**

*(Example: Friday afternoon for a fine dining restaurant)*

Your Dinerware system enables real-time changes to occur so it is a good practice to make small adjustments whenever the need arises.

However, Dinerware strongly recommends you **plan any maintenance and/or larger system changes in the early parts of the week** (Monday or Tuesday) as a cautionary measure.

This will allow for any extra time needed to troubleshoot unexpected system behaviors, or if necessary, to schedule Dinerware support well in advance of the busy weekend.





# Troubleshooting Tips

*While Dinerware has made every attempt to provide a support-free environment by creating detailed instructions, there may be an unforeseen instance where support is needed.*

## PLEASE TRY THESE SIMPLE STEPS BEFORE YOU CALL

Please review the following items which are a collection of common support issues and the simple remedies Dinerware support will address as a first line of questioning.

## Random system problems

- **Reboot your computer** because random problems can arise with computers if they haven't been shut down for a long time
- For any random, sudden software issues, exit out of Dinerware, choose the Windows **'Start'** button in the bottom left hand corner and choose **'Shut Down'** then either choose to shutdown completely - including the equipment (this will require you to press your power button to turn it back on once it is completely shut down), or restart the software system without turning off the physical equipment, in which case the computer will start back up automatically
- If system is unresponsive, hold down the power button until the machine turns itself off



# Self Help

30

- **Wait 10 seconds, then push the power button again to turn it back on**



## Tickets not printing

- Turn your printers off and back on
- Make sure the printer is getting power
- Make sure that the error light is not on and that there is paper in the printer
- Check all cable connections



## Credit cards are slow or will not process

- Check network cable connections to ensure they are completely plugged in and not loose or partially plugged in
- Make sure the system is connected to the internet
- Reboot your modem and/or router by simply unplugging the power cord from the back of each device, waiting a few seconds, and plugging them back in — **be sure to plug the modem in FIRST and wait a full minute BEFORE you plug in the router!**

**If credit card processing is slow it could be your internet connection. If this occurs, please take the following steps:**

1. Unplug the modem (if you are unsure what the modem is, please contact Dinerware)
2. Unplug the router (if you are unsure what the router is, please contact Dinerware)
3. Wait a full 30 seconds
4. Plug in the internet modem **FIRST**
5. Wait 60 seconds
6. Plug in the Dinerware router **LAST**

## Error messages

*(Example: Searching for Brain)*

- **The Dinerware Brain application must be running on the brain machine** in order for a workstation to function
- Check cable connections
- Reboot router and/or modem



## Cash drawer won't open

- Make sure the employee is clocked in and has **chosen the specific cash drawer at the station they are assigned** (If the employee is already clocked in, clock them out and clock them back in and select the cash drawer)



# Self Help

32

- Make sure the printer connected to the cash drawer has paper and/or that it is functioning correctly

There could be times when the system seems to be running too slow. For instance, the workstation takes longer than usual to connect to the brain, or a credit card takes a longer time to process, or in general, the system seems to be slower than “normal.”

**If the system operates at a slower rate than usual, it is time to exit out of the Dinerware software and reboot the system, software first, equipment last.**



## Software Updates

Software updates are available from your authorized Dinerware dealer. Dinerware continually updates and releases maintenance versions of the software.

Ask your authorized Dinerware dealer about feature updates and hardware-system requirements before purchasing software upgrades, third party software or hardware.



# Dinerware Training

## Resources and Options

The easy-to-use Dinerware software screens, short video step-by-step instructions and downloadable online guides are designed to help you get up and running without the need for one-on-one training. However, sometimes customers prefer additional training.

Dinerware always recommends that all owners of the business, bookkeepers, and staff participate in training.

We realize turnover can be high in the hospitality industry, so it is always a good precaution for owners particularly to attend the Dinerware training sessions. It may be tempting for a business owner to only send a manager and key staff to attend training, however, should the manager leave the company, knowledge of the system and how it is set up for the business goes with that individual.

Additional training can be made available to owners. Please contact your Dinerware training manager to learn about specific training options available to you.

Several free online resources are available to all Dinerware customers:

<http://www.dinerware.com/pos-product/training>

# Self Help

34

## List of User Guides

### Menu

- Introduction
- Revenue classes
- Menu item
- Screen category
- Choice set
- Choices
- Taxes

### Management

- Create a job
- Setup an employee
- Edit a shift
- Happy hour discounts
- Barcode scanning

### Reports

- Daily
- Summary (page)
- RFO
- Payroll
- Shift report

### Tickets

- Open, close
- Share items
- Split or combine
- Open by customer
- View all tickets
- Assign tip to credit card

## Dinerware User Guides

These quick start guides include all the basic steps necessary for general operations of your Dinerware software.

### Menu

#### Introduction

#### How to create a new database in your new Dinerware system

After Dinerware has been installed, double-click the Dinerware brain icon on the desktop.

Once the brain has started, you will be prompted to choose between **'Restore from a Backup,' 'Start with a Blank Database,'** or **'Load a Sample Database.'**

#### Sample database

The sample database contains a few fictional menu items, item groups, revenue classes, jobs, etc.

The sample is provided to help you become familiar with the system before you create your own menu using a blank database.

#### Blank database

To start with a blank database if another database has already been loaded, select **'Choose'** and then **'Add**

**Blank Database'** and provide a name for that database.

**Important:** While the sample database can be used for the creation of a new menu, you must remember to first deactivate the existing fictional components (menu items, jobs, revenue classes, etc.).

## Correct menu setup in Dinerware

Your menu should be setup in Dinerware in a specific order.

Some components, like Item Groups will need information from Revenue Classes, and Menu Items will need to be associated with Item Groups, for example.

This section assumes you will setup your menu based on a blank database. If you need to add to or edit your menu, consider the existing menu components and use revenue classes, item groups, screen categories, etc. when that is appropriate and create new ones when it is not.

Your Dinerware menu should be built in the following order:



*This is the most effective and quickest way to setup your menu. This sequence allows you to understand how the Dinerware menu hierarchy works.*

## Revenue Classes

Revenue  
Classes

A **revenue class** is a logical association of items for the purpose of applying taxes and reporting. **A best-practices menu does not use many Revenue Classes.** Generally, three to five revenue classes per menu will be the average number required. Revenue classes reflect the type of establishment and the local tax laws. **The most commonly used revenue classes are 'Food,' 'Beer,' 'Wine,' and 'Liquor.'**

# Self Help

36

## How to create a revenue class

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen
2. Touch **'Menu'** and the menu edit screen appears
3. Touch **'Revenue Class'** then touch **'New'**
4. Use the onscreen keyboard (icon lower left) and name the revenue class (**Example:** Liquor) and touch **'Ok'**
5. Determine if the revenue class needs to be treated as **'Liquor'** or otherwise
6. Check the box **'Class is Liquor for tax purposes'**
7. Select **'OK'**

A new revenue class has been added and can be seen in the list under **'Revenue Class Name:'**

## Item Groups



An item group is a logical association of items for reporting and pricing purposes. **A menu can be setup with only one item group but this will render many of the Dinerware reports meaningless.**

A best-practices menu has many item groups. Each group associates similar items in a manner that enables you to create powerful sales reports. Commonly used item groups are: **'Draft Beer,' 'Appetizers,'** and **'Glass Wines.'**

Item groups can also be used to **set the price of all menu items within that group,** when desired.

## How to create an item group

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen

2. Touch **'Menu'** and the menu edit screen appears
3. Touch **'Item Group'** then touch **'New'**
4. Use the on-screen keyboard (icon lower left) and **name the Item Group (Example: 'Glass Wine')** and touch **'Ok'**
5. Select **'OK'**

A new item group has been added and can be seen in the list under 'Item Group'

## Menu Items



A menu item is the specific, tangible item that an employee orders for a customer, such as a lunch entrée or a glass of wine. This item will appear on receipts with a price and is the goal of the order entry process.

## How to add a menu item

If a new menu needs to be created, please start with a new database (see the User Guide introduction section of this guide).

For this exercise, assume a menu already exists and a new item on the menu needs to be created.

Login to the terminal using a four-digit PIN.

1. From the order entry screen, touch **'Manager'** at the top right of the screen
2. Touch **'Menu'** and the menu edit screen appears
3. Touch **'Menu Item'** then touch **'New'**
4. Use the onscreen keyboard (icon lower left) and name the menu item (**Example: Wings**) and touch **'Ok'**
5. Touch **'Revenue Class'**
6. **'Food'** is highlighted by default; if not, touch **'Food'**

# Self Help

38

7. Select the check box next to **'Price'**
8. Use the onscreen keyboard and type in a price and touch **'Ok'**
9. Touch **'Printer'**
10. For this exercise, choose **'Kitchen'** and touch **'Ok'** to accept this printer
11. Touch **'Save as New'** at the bottom of the screen

A new menu item has been added.

Check to see if the new menu item has been added. Touch **'Back'** to get to the manager screen, then **'Back'** again to get to the order entry screen. You should see a menu item called **'Wings.'**

**Tip:** If you need to add an entirely new category to your menu, please refer to the page 40: How to add a screen category.

**Note:** Don't be afraid to experiment. It is easy to rearrange menu items and you can immediately see how your changes affect the order entry experience for your staff.

## Choices



Choices are modifiers that are used to specify or alter a menu item. Examples of choices are salad dressings (ranch or blue cheese) and meat temperature (rare or well-done). **Choices may affect menu item cost.**

## How to add choices

For this exercise, assume a menu already exists and a new category on the menu needs to be created.

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen
2. Touch **'Menu'** and the menu edit screen appears

3. Touch '**Choices**' on the left, then touch '**New**'
4. Use the onscreen keyboard icon (lower left), name the choice (**Example: BBQ**), then touch '**Ok**' to accept this name
5. Touch '**Ok**' again in the lower right of the screen to save this new name and the menu edit screen appears
6. Touch '**Choice Sets**'  
  
If you created a choice set called '**Sauces**' you will see it listed on the right.
7. Touch to highlight '**Sauces**' and touch '**Edit**'  
  
The left column lists all choices created.
8. Touch '**BBQ**' then touch the right arrow and touch '**Ok**'

## Choice Sets



Choice sets are associated choices that are grouped together and assigned to specific menu items. As above, a series of meat temperatures (rare through well-done) make up the choice set '**Meat Temperature!** **Without a choice set, choices cannot be associated with a menu item.**

## How to add a choice set

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch '**Manager**' at the top right of the screen and the manager screen appears
2. Touch '**Menu**' and the menu edit screen appears
3. In the left of the screen, touch '**Choice Sets**' then '**New**'
4. Use the onscreen keyboard icon (lower left), name the choice set (**Example: 'Sauces'**), then touch '**Ok**' to accept this name
5. Touch '**Ok**' again in the lower right of the screen to save this new choice set

# Self Help

40

Check to see if the new choice set has been added. Touch **'Back'** to get to the manager screen, then **'Back'** again to get to the order entry screen. You should see a choice set called **'Sauces.'**

**Note about choice sets and menu items:** To associate a choice set with a menu item, touch **'Items with this Choice Set.'** Two columns appear. Menu items currently in the system are on the left. Highlight items you want to attribute the **'Sauces'** choice set.

Touch the green right arrow to move into right column. Items moved into the right column will now be attributed to the choice set **'Sauces.'**

## Screen Categories



A screen category is a group of associated menu items that are placed behind a single screen category button and are used to increase the ease and speed with which items are ordered by an employee.

## How to add a screen category

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen
2. Touch **'Menu'** and the menu edit screen appears
3. In the left of the screen, touch **'Screen Category'** and the screen category screen appears
4. Touch **'New'**
5. Use the onscreen keyboard icon (lower left) and name the screen category (**Example: 'Appetizers'**)
6. Touch **'Ok'**

A new screen category has been created.

Check to see if the new screen category has been added. Touch **'Back'** to get to the manager screen, then **'Back'** again to get to the order entry screen. You should see a screen category called **'Appetizers.'**

**Tip:** Once a screen category has been created, menu items can be added to this section of



the menu. Please refer pages 37-38: How to add a menu item.

As above, you cannot create a choice set unless you have already created the choices for that set. Please create your choices before you create screen categories.

## About taxes in Dinerware



Learn how to set up tax amounts and how to attribute those taxes to specific items within the Dinerware system. Dinerware does not address local, state or federal tax requirements for any business. It is the responsibility of the restaurateur to understand what taxes, including rates and percentages, must be set up in the Dinerware software.

**Important:** Specific rules and exceptions apply to different businesses. Dinerware strongly recommends owners first consult a certified tax professional, such as a CPA, to ensure correct rates can be set up in the Dinerware system.

### This section provides the following

- An introduction to taxes, revenue classes and menu items
- How to create a new tax
- How to assign a tax to a revenue class
- How to set tax rates for individual menu items
- How to make liquor/beer/wine taxes “hidden taxes”
- Taxes, Revenue Classes and Menu Items

A tax is an added amount, and can be a flat number or a percentage. In some cases, some taxes are flat and others are a percentage and both types may need to be set up in Dinerware. Taxes can be attached to different items set up in the Dinerware system. A revenue class is a group of menu items that share tax and accounting rules.

Alcohol sales and food sales are often taxed at different rates. Taxes and Revenue Classes track sales of these differently taxed groups.

Specific tax rates can be applied to either revenue classes or individual menu items. **If menu items are assigned to a revenue class first, a tax can be applied to a whole class in one step. Menu items may also be taxed individually.**

# Self Help

42

## How to create a new tax

A tax must be created before it can be attributed to a revenue class or a menu item. Use the menu, revenue, and tax setup screens.

**Important:** Consult a certified tax professional to learn tax rates required before setting up taxes in the Dinerware system.

Login to the terminal using your four-digit PIN

1. From the Manager screen, touch **'Menu'**
2. Touch **'Taxes'**
3. Touch **'New'**
4. Name the tax (**Example: 'State Liquor Tax'**)
5. Enter the tax amount and specify how it is applied
6. Select the appropriate check box to specify if the tax is either:
  - A percentage of the price **OR** • A flat fee
7. To link the tax to specific menu items, select the appropriate boxes on the items list
8. To link the tax to revenue classes, select the appropriate check boxes on the **'Revenue Classes'** list on the far right

## How to assign a tax to a revenue class

Alcohol sales and food sales are often taxed at different rates. Use the taxes and revenue class functions to track sales of these differently taxed groups.

By linking a tax to a revenue class, that tax can be applied to all menu items in a single simple step.

Login to the terminal using your four-digit PIN

1. From the Manager screen, touch **'Menu'**
2. Choose **'Taxes'**
3. Select the tax to assign to the revenue class

4. Touch **'Edit'**
5. To link the tax to specific menu items, select the appropriate check boxes on the items list

## How to set tax rates for individual menu items

Some menu items may have individual taxes associated with them.

Login to the terminal using your four-digit PIN

1. Touch **'Manager'**
2. Choose **'Menu'**
3. Choose **'Taxes'**
4. Select the tax to assign to the menu item (if the tax does not yet exist, create it)
5. Choose **'Edit'**
6. To link the tax to specific menu items, select the check boxes on the **'Items'** list

# Management

## How to create a job

Learn how to create a job, assign a pay rate, and select options associated with different job types. There are several positions, each with different attributes and pay rates that can be created in Dinerware. The position 'Manager' is a default job in the system and can be easily edited. You must have manager privileges to create or edit a job.

1. From the order entry screen, touch **'Manager'** at the top right of the screen and the manager screen appears
2. Touch **'Jobs'**
3. At the bottom of this screen touch **'New'**

This brings you to the edit jobs screen. There are many options, but two basic requirements needed to create a job are: **create a name** for the job and **define a pay rate**.

# Self Help

44

4. Touch **'Job Name'** then touch the onscreen keyboard (icon lower left) and type the job name (like **'Server'**) then touch **'Ok'**
5. Touch the field **'Base Pay Rate'** then touch the onscreen keyboard icon and **type the hourly pay rate.**
6. Touch **'Ok'** on the onscreen keyboard

Dinerware automatically calculates the **overtime rate and time and half**

7. Touch **'Ok'** to save this new job

## Important tips for specific job attributes:

### Managers

Dinerware does not manage payroll for salaried employees like managers, so leave the pay rate field blank. If a manager does not have an hourly rate of pay, the manager will not show up on payroll reports.

**Under the 'All Tickets Privilege' section, select the radio button 'Operate as Manager.'** This allows any transactions made by the manager to stay with the ticket owner (important for end of day settlement procedures).

### Servers and cashiers

Check **'Fast Pay'** and **'Allow List View'** boxes for the server/cashier position. List view allows servers to transfer and combine tickets. Fast pay allows servers to cash out a customer with the least number of touches (ideal for quick serve environments).

### Kitchen staff

Select **'Logs In and Out of Personal Page'** or **'dishwasher mode'** for kitchen positions. This option prevents the user from accessing the order entry screen.

## How to add an employee

Add an employee to the system and assign a Personal Identification Number (PIN). In a few short steps, you can add or edit an employee into the Dinerware system, assign a PIN and assign an appropriate security setting. You must have manager privileges to create or edit an employee.

1. From the order entry screen, touch **'Manager'** at the top right of the screen and the manager screen appears

2. Touch **'Employees'**

This screen lists all employees currently in the Dinerware system

3. Touch **'New'**

Two fields (top left) are needed to create a new employee: **Employee Name** and a **PIN**

4. Touch the **'Screen Name'** field, then touch the onscreen keyboard (icon lower left) and type in a name and touch **'OK'**

5. Touch the **'PIN'** field then use the onscreen keyboard (icon lower left) and type a four digit PIN, and touch **'OK'**

6. **To save this new employee** (or make edits to an existing employee) in the system, touch **'OK'**

**Tip:** An employee will not be able to login to the system until they have been assigned at least one job.

**Tip:** It's a good practice to have employee job applications ready and enter all details in the system when you create a new employee.

## Security settings

Dinerware has over 40 security settings. Security settings are associated with the individual employee, so consider your trust level of the employee and what types of jobs within the restaurant they will perform.

For some it will be appropriate to give only limited access, while for others, like a manager, you may want to provide deeper access into the Dinerware system.

The system defaults to **'Select All.'** Touch this field and a drop down menu appears with choices, including **'Select All Non-Management'** (a template for basic employees).

## How to setup PIN-less security privileges

Managers can set employee specific security privileges without security validation via the entry of a manager PIN.

Managers can set specific functions to be available for employee access and use in One Touch Login mode, without security validation. For example, a server would not need manager assistance to provide a discount if the server had the proper security validation. In Dinerware,

# Self Help

46

actions that require a security check can be set per-feature and per-restaurant when One Touch Login (OTL) is in use.

## How to enable one touch login (OTL)

1. Login to the terminal using a four-digit PIN
2. From the order entry Screen touch **'Manager'**
3. Select **'System'** then touch **'Security'**

**Important:** There is no keypad for PIN login, which means that one touch will take the user directly to the order entry screen.

## How to setup PIN-less functions

1. Login to the terminal using a four-digit PIN
2. From the order entry screen touch **'Manager'**
3. Select **'System'** then touch **'Security'**
4. Select **'No PIN Functions'**
5. Select the function(s) that should not require security authentication from the list. Employees will no longer require a PIN for those actions.

## Edit shifts

The edit shift feature allows a manager to quickly correct any clock in or clock out errors. Managers can edit specific parameters such as pay rate or job performed.

### Always "On" System

Dinerware is designed to operate in a 24/7 environment, **so employees will stay clocked in** unless they clock out. An employee that does not clock out at the end of their shift will be automatically clocked in and out of again at the end of the 24 hour workday. The workday resets at 4:00 a.m. This is a Dinerware system default that can be adjusted at the time of installation, and why we request the business hours of operation. It is common for those new to the system to forget to clock out, which will result in incorrect shifts. The shift edit feature makes corrections fast and easy.

## How to edit a shift

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch '**Manager**' at the top right of the screen and the manager screen appears
2. Touch '**Labor**' and a screen appears with a list of clocked in employees and all shifts that occurred in the last two days
3. Use the drop down menu to see historical shifts for any date range specified
4. To modify or delete a shift, touch the shift to select it
5. Touch '**Edit**' in the lower left of the screen, a new dialog box appears
6. Select the date the shift began or ended, the pay rate, the job and even tips; make all desired changes
7. When finished with edits, touch '**Ok**' to save

Repeat this process to delete or create a new shift

## How to create happy hour discounts

Login to the terminal using a four-digit PIN

1. Touch '**Manager**' and the manager screen appears
2. Touch the '**Discounts**'
3. To create a new discount touch '**New**' and the discount screen appears

This area allows you to create rules for how you want to price items at different times of day.

4. **Name the discount** using on screen keyboard
5. Enter the happy hour **discounted price**
6. Choose the **days of the week** you would like this discount to apply
7. Choose which part of the day, such as 4pm - 6pm
8. Select the item(s) to which this discount will be applied

# Self Help

48

You can quickly check your work just by ringing an item on any ticket during the happy hour time and day you have setup.

Dinerware will calculate and list happy hour discount totals on both the Daily report and the RFO (Restaurant Financial Overview) report. In addition, there are several discount-specific reports under 'Sales' in the reports section of the manager screen. Please see page 52: How to access summary or page reports.

## How to create a message of the day

Communicate with staff easily. The Message of the Day feature enables your message to appear on the Log In screen. Use this tool to announce specials of the day or to alert staff about meetings. Managers use this efficient communications tool as a way to instantly reach those on shift.

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch '**Manager**' at the top right of the screen
2. Touch '**Daily**'
3. Touch '**Message of the Day**' in the upper right of the screen
4. To alter an existing message, touch the message to select it, then touch the keyboard icon in the lower left and edit as needed

Or, to create a new message, choose '**New**' then touch the keyboard icon in the lower left and type the message.

5. Touch '**Ok**' to save

## How to edit the fresh sheet

The fresh sheet feature in Dinerware allows the ability to manage inventory of specific items in real time. It can be used in fine or casual dining for items like limited quantity appetizers, daily specials or bottles of wine. Bars and nightclubs use this feature to track merchandise such as T-shirts.

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch '**Manager**'
2. Touch '**Fresh Sheet**'



3. Touch **'Edit Fresh Sheet'**

The left column contains all menu items. The right column lists all items and their quantities that appear on the fresh sheet.

4. To add an item to the fresh sheet, touch it in the left column to select it
5. Touch the right arrow to move that item onto the fresh sheet
6. Touch the item again and choose **'Edit'** and enter the quantity of this item
7. Touch **'Ok'** to save updates to the fresh sheet

When this item is ordered, it will instantly deduct from the original quantity entered. When all items on the fresh sheet have been ordered, the count will read 'zero.'

## Bar tabs

The activation of bar tabs enables credit card pre-authorizations for a pre-determined amount. A bar tab is created when a specific card is swiped to open a new ticket. A manager or business operator determines the uniform pre-authorization amount for all bar tabs before the start of business. The amount cannot be modified on a per-ticket or per-tab basis.

The bar tab feature is intended for use in fast-paced bar and nightclub scenarios to allow the customer to open a tab yet retain physical possession of their card.

This functionality will prevent the use of expired or cancelled card "walk outs" on open tabs.

**Important:** Use of bar tabs means the account holder will have an authorization placed against that amount by their bank.

## How to enable bar tabs

1. From the Manager screen, touch **'System'**
2. Choose **'Credit,'** then **'Advanced'**
3. Select the check box **'Allow credit cards to be authorized ahead of time'**
4. Enter the desired pre-authorization amount in the **'Standard authorization amount'** field
5. Touch **'Ok'** in lower right of screen

# Self Help

50

**Important:** The time it takes for a **pre-authorization hold** to expire varies by bank, so the **credit card holder should always consent to opening a bar tab and the hold amount** prior to the use of their credit card — those funds will not be available until the bank has processed pre- and post-authorizations and adjusted the account balance accordingly. The time period varies from institution to institution but is generally measured in business days.

When a card is swiped, a slip will print on the receipt printer that indicates the customer's card has been pre-authorized. This slip should be handed to the customer. If barcodes are printed on customer receipts that barcode can be scanned to recall the ticket for payment.

If the guest check total does not exceed pre-authorized amount, a screen will prompt you to make a choice:

'**No**' allows users to enter the normal credit card transaction screen and adjust the payment total and tip.

'**Yes**' will bring up the normal payment screen. Payment for the total amount of the ticket has been collected and is awaiting a tip. The ticket should remain open until the customer has signed the credit card slip. The tip may be entered and the payment/ticket can be closed normally. If the customer is no longer present, any decisions regarding the lack of a signed customer slip should be discussed with your merchant processing representative.

## About setup barcode scanning

**Important:** Barcode scanners in Dinerware must connect via USB

## Overview of terms and definitions

### *Universal Product Codes (UPCs)*

A Universal Product Code or UPC is a symbol and associated barcode that is widely used to track items in North America and in countries that include the UK, Australia and New Zealand.

Merchants use a UPC to identify an item via a scanner during checkout. Most products sold at retail in the US are labeled with a UPC by the manufacturer. To obtain a UPC for a product that was not labeled at the time it was manufactured, merchants must register with the UPC governing body.

## Stock-Keeping Units (SKUs)

A Stock-Keeping Unit or SKU is a unique identifier of alpha-numeric characters managed at the merchant level that can also be used to generate and print barcodes.

UPCs or SKUs can be used in Dinerware to identify unique products via a barcode scanner.

**Important:** Dinerware does not generate barcodes. Merchants interested in using barcodes to identify and sell their products should research the various options available online and through third party software applications.

## Setup barcode scanning for Dinerware

**First,** Screen Categories that contain the Menu Items designated with a SKU or UPC **must be in 'View as List'** mode. For information on how to enable View as List, please refer to the document '**Item Lookup Setup Guide.**'

If a menu has **not been setup in Dinerware,** it is best to enter the SKU or UPC for the menu item when it is initially entered.

If the menu has been setup in Dinerware, each menu item must be edited and the SKU or UPC must be added.

### How to edit menu items for UPCs/SKUs

1. Login to the Manager screen and touch '**Menu**'
2. From the Edit Menu Item screen, either type in the UPC/SKU via the onscreen keyboard or scan the UPC/SKU in the Item SKU field

Repeat these steps for each menu item.

### How to search for an item via a SKU or UPC

From the **order entry screen** notice that the cursor defaults to the item lookup input field. Use a keyboard or barcode scanner to input the item SKU or UPC. The item will be found within the list and added to the ticket.

**Item lookup** allows the user to view and filter a large number of items within a screen category. Operators can use the onscreen keyboard to type the menu item name to quickly locate menu items. Operators no longer have to page-over a number of items within a screen category.

Restaurants with extensive wine or cocktail lists, for example, will find this feature reduces the time it takes servers to enter orders.

# Self Help

52

## Reports

### How to access daily reports

Dinerware is designed to begin a new business day automatically, so there is no requirement for an 'End of Day report' or 'Z report'. Managers need quick report access to get an overview of sales for the business and for individual servers. View the report onscreen or print it on the thermal receipt printer adopted at the workstation.

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen and the manager screen appears
2. Touch **'Daily'** and select the day or date ranges using the tool on the right of the screen
3. Select a revenue center from the drop down menu under the date options
4. The shift report appears on the right
5. To print this report, touch **'Print'**

**Tip:** To see individual employee shift reports, follow the same process, but choose by checking the box next to that employee's name and then touch **'Selected Users.'**

The **'Drawer Report'** is a report that breaks down transaction types and amounts of those transactions on a per-drawer basis for the cash drawers that are attached to and adopted at each workstation. This means drawer reports must be run on a per-terminal basis.

### How to access summary or page reports

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen and the manager screen appears
2. Touch **'Reports'** and the reports screen appears
3. Several categories are organized in the drop down menu in the upper left of the screen (by default, sales reports appear first)
4. Use the drop down list and highlight the report category desired

5. Select a date range such as **'Today'** or **'Year To Date'** or check the **'Enter Date Range'** box to select a date and time via the calendar and clock icons
6. Touch **'Show Report'** on the upper right of the screen

Once the report appears, a report can be saved in file formats such as Excel or PDF. Reports can be printed on 8.5" x 11" paper if an office printer is installed in the Windows environment and adopted to that thermal printer.

## How to run an RFO (Restaurant Financial Overview) report

Two reports that almost all Dinerware customers use are the RFO, or Restaurant Financial Overview, and the payroll report.

**Important:** Access to the reports screen is a manager privilege.

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen and the manager screen appears
2. Touch **'Reports'** and the Reports screen appears
3. From the upper left drop down menu, select **'Sales'** (by default, sales reports appear first)
4. Use the view pane that appears and highlight the report desired (there are two different RFO reports: the **RFO** and the **RFO with Labor Summary**)

To save a report, touch **'Save as PDF'** or **'Save as CSV'**

5. Select a date range such as **'Today'** or **'Year To Date'** or check the **'Enter Date Range'** box to select a date and time via the calendar and clock icons
6. Touch **'Show Report'** on the upper right of the screen

Once the report appears, the report can be saved in several formats (see Step 4 above).

## How to run a payroll report

Login to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Manager'** at the top right of the screen and the manager screen appears

# Self Help

54

2. Touch **'Reports'** and the reports screen appears
3. From the upper left drop down menu, select **'Labor'** (by default, sales reports appear first)
4. Use the view pane that appears and highlight the report desired
5. Select a date range such as **'Today'** or **'Year To Date'** or check the **'Enter Date Range'** box to select a date and time via the calendar and clock icons
6. Touch **'Show Report'** on the right of the screen

**Note:** The Payroll Detail report displays each shift that an employee has worked, on a per-employee basis. The Payroll report aggregates the total number of hours worked on a per-employee basis.

## How to access a shift report

Learn how to clock in, select a job, check personal messages, access a shift report and clock out.

**End of Shift:** Dinerware acts as a time clock and will track hours from the time an employee clocks in until the employee clocks out. If an employee forgets to clock out, the system will continue to add hours to the "clocked in" employee.

Before an employee clocks out, the areas an employee will access are Message Center and Shift Report (for employees using a cash drawer). For details about the Shift Report, please refer to the Dinerware Guide to Cash Management. If an employee has not processed any sales, the Shift Report will not appear on that employee's personal page.

Log On to the terminal using a four-digit PIN

1. From the order entry screen, touch **'Personal Page'** at the top right of the screen
2. On the left is your **Shift Report** and on the right is the **Message Center**

**Shift Report:** This lists all sales and transactions for your current shift.

Use this report to reconcile cash, credit receipts and tips against what has been entered into the system during a shift.

An employee will present this report to management at the end of their shift.

3. **Clock Out:** Touch **'Clock Out'** or choose **'Print and Clock Out'**

Servers and cashiers will see two types of tips: Known Tips (credit card sales) and Other Tips (usually cash sales).

4. Enter a number then touch **'Clock Out'**

Upon clock out, a shift summary slip will print for that employee.

## Tickets

### How to open and close tickets

Dinerware is designed to accommodate many different environments. For example, a bartender will need the ability to open and close tickets out fast, while a fine dining restaurant will want the ability to easily split or combine checks. There are several ways to manage tickets.

**Note:** A guest check and ticket are two different things. A ticket exists only within the software, and a guest check is a physical thing. For the purpose of operating the Dinerware software, we will refer to tickets.

The following examples are typically how bars, cafes, nightclubs and quick service restaurants use Dinerware to open and close tickets.

### Open a ticket

1. From the order entry screen, **touch a screen category** (Example: bottled beer)
2. Then **choose a specific item** and touch that menu item (Example: Corona)

A new ticket automatically appears on the left of the screen and will display each item and its price (after the item has been added to the ticket).

### Pay the ticket with cash

1. At the bottom of the ticket, touch the **'Fast Pay'** button that corresponds to the amount being tendered
2. The amount tendered, the amount due and the amount of change due are displayed

### Pay the ticket with a credit card

1. At the bottom of the ticket, touch **'Credit'**

# Self Help

56

2. A box appears and prompts '**Swipe Credit Card**'
3. If the Dinerware system is setup to allow for the customer to leave a tip, a credit card slip for tip and signature will print  
  
The server will present this slip to the customer.
4. When this slip has been completed, the employee will enter the amount of the tip in the transaction screen and close the ticket

## How to open tickets and share items

There are several ways to manage tickets. The following examples are typical of how fine dining or casual dining restaurants use Dinerware to open tickets, split items or share items.

### Open a ticket

1. At the bottom of the order entry screen, touch '**New Ticket**' and a ticket appears
2. Touch the **table icon** in the upper left of the ticket and the Table Section screen appears
3. Touch a section, a table, and the number of persons on the ticket and touch '**Ok**'

The order entry screen appears, and the ticket is ready to accept the party's orders.

### Share items

1. Commit the ticket, then open the committed ticket
2. Touch a menu item in the ticket  
  
New buttons appear at the top right of the ticket.
3. Touch '**Share Item**'

If two people want to share an item, add 1 share to person 1, and add 1 share to person 2.

This will share out the cost of that item between two people. An item can be shared out among any number of guests at the table. This is ideal for fine dining where bottles of wine, appetizers and other items are commonly shared.



## Split a single ticket into two tickets

1. At the bottom of the ticket, touch **'Split Ticket'**

A diagram appears. There are several ways to split the ticket depending on the guest situation.

2. If guests at a table want their own bill, touch **'Split All Guests to New Tickets'**
3. Touch **'Split'**

Two tickets appear: Table 1 and Table 1:2. Both guests have their own ticket. If the guests shared any items, those items are now listed and divided in cost on each ticket.

## Combine tickets

1. Touch **'List View'** (**List View privileges must be activated before tickets can be combined**)
2. Touch the tickets to be combined, then touch **'Combine Tickets'**
3. Touch **'Yes'** to confirm

Previously split tickets are combined into a single ticket.

## How to open a ticket by customer

Dinerware comes with a powerful database that enables you to track customer order history. There are several ways to open tickets associated with a customer in the database.

### Customer history

1. From the order entry screen, touch **'Customer'** to see a list of customer names in the database
2. Choose a customer and touch the name and the order history for that customer appears

### Open a custom ticket by previous orders

In the customer sales history list, touch an item the customer orders frequently (ideal for regulars with favorite menu item requests).

# Self Help

58

## Open a customer ticket using new ticket

1. Above the customer sales history list, touch '**New Ticket**'  
  
The table screen appears.
2. Choose a table, then touch '**Ok**' and a new ticket appears with the customer name

Either way the customer ticket is opened, people can be added (if necessary) and the ordering process can begin.

## How to view all tickets

**List View** is an alternate way to view open tickets in Dinerware. Staff with permission granted by a manager can access List View by using the toggle button at the bottom of the main order entry page. In the list view screen, staff can sort tickets in a number of ways and perform other commands on multiple tickets at one time by touching and selecting the tickets.

**Important:** List View is a privilege assigned by job. A manager can assign a job this privilege in the Jobs screen.

### *Functions available from list view:*

#### Transfer tickets

1. From the order entry screen, touch '**List View**'
2. Touch ticket(s) you want to transfer
3. Touch '**Transfer to Self**' or '**Transfer to Others**'
4. Choose '**Yes**' to accept the ticket(s) transfer

#### Combine tickets

1. From the order entry screen, touch '**List View**'
2. Touch ticket(s) you want to combine
3. Touch '**Combine Tickets**'
4. Choose '**Yes**' to combine the ticket(s)

## Pay tickets with cash

1. From the order entry screen, touch **'List View'**
2. Touch ticket(s) you want to pay
3. Touch **'Pay with Cash'**

## Assign tips to ticket

1. From the order entry screen, touch **'List View'**
2. Touch ticket(s) you want to assign tips to
3. Touch **'Assign Tips'**
4. Enter individually each tip for each ticket

## How to assign a tip to a credit card

Dinerware allows for several ways to pay, however most guests pay with credit cards.

## Commit or send the open ticket

1. Touch **'Ok'** on the open ticket to commit the order
2. Re-open the committed ticket and touch **'Pay'**
3. From the payment screen, touch **'Credit'** and swipe the credit card; after the card processes the order entry screen appears
4. The ticket now appears with red **'TIP!'** This ticket has now been pre-authorized
5. To finalize with tip, the server takes two copies of the pre-authorization to the customer for their signature and tip assignment

After the customer has written in the tip and signed the authorization, the ticket may be closed.

6. Touch the ticket (with TIP!) and touch **'Pay'**  
The credit card information appears on the left of screen.
7. Use the keypad to enter the tip, or the total amount of the sale
8. Touch **'Finalize'** in lower left of screen and touch **'Close'** to complete the credit card sale

# Self Help

60

## How to add guests to a ticket

Most systems make it very difficult to add new guests to an existing check after that check has been created. Not so with Dinerware. In an informal bar environment it is very common for new guests to come and sit at an existing table.

1. Touch the ticket to open it and then touch **'New Person'** icon in the upper left of the ticket
2. A second person icon appears on the ticket  
  
Every time the **'New Person'** icon is touched, another person is added to the ticket
3. To add items to each person, touch the person then the item
4. To commit the ticket, choose **'Ok'**

## How to rename a ticket

Often in a bar, customers refuse to sit still. They often want to move around. They won't stay at "Bar #1."

Tickets can be renamed to be more specific or descriptive.

1. Touch the ticket to open it and then touch the name of the ticket
2. Touch **'Custom Table Name'** and an onscreen keyboard appears
3. Type in whatever name is useful and touch **'Ok'**

The ticket has been renamed to make it easy for the server or bartender regardless of where that customer moves to in the bar.

## How to use the item lookup function

Login to the terminal using a four-digit PIN

1. From the order entry screen touch **'Manager'**
2. From the manager screen touch **'Menu'**
3. From the menu screen touch **'Screen Categories'**
4. The screen displays all active screen categories on the right with the items in that category listed

5. To edit a screen category, touch the category and then select '**Edit**'

The edit screen category screen will appear where the specific attributes of that category can be set

6. To enable Item Lookup check '**View As List**' at the bottom of the edit screen category screen (see above)

**Note:** Many restaurants employ bin numbers for each wine on the menu to find wines quickly. Bin numbers can also be used to filter a long list to find the correct menu item.

# Extras

62

## About PCI compliance

This section is an interpretation of the 12 Steps to PCI Compliance, and was edited with the intent to assist non-technical Dinerware customers with the concepts associated with each step.

The following information is current as of June 2010.

**To ensure no alterations or additions have been made always refer to the originating source: the PCI-SSC website.** There, merchants will find the most updated versions from the entities that have mandated the compliance rules.

### *Available resources*

#### **PCI security standards council website**

<https://www.pcisecuritystandards.org>

#### **Getting started documents**

[https://www.pcisecuritystandards.org/security\\_standards](https://www.pcisecuritystandards.org/security_standards)

#### **General resources**

[https://www.pcisecuritystandards.org/approved\\_companies\\_providers](https://www.pcisecuritystandards.org/approved_companies_providers)

[https://www.pcisecuritystandards.org/security\\_standards/documents](https://www.pcisecuritystandards.org/security_standards/documents)

#### **Self-assessment questionnaire (SAQ)**

<https://www.pcisecuritystandards.org/saq/index>

#### **List of PCI-SSC certified vendors:**

[https://www.pcisecuritystandards.org/qsas\\_asv/find\\_one](https://www.pcisecuritystandards.org/qsas_asv/find_one)

## What is PCI?

PCI stands for 'Payment Card Industry.' PCI refers to an organized group founded in 2006 by five global payment brands: American Express, Discover Financial Services, JCB International, MasterCard Worldwide, and Visa Inc.

These and other entities formed a security council that established standards all merchants must comply with in order to process payments via credit or debit transactions.

## What does being compliant mean for restaurant owners (processing merchants)?

PCI compliant merchants have established, communicated and enforced policies that are designed to proactively protect any access to credit card data. These merchants also use a PA-DSS validated point of sale (POS) application, such as Dinerware.

The most significant changes merchants will face is a shift in workflow and the creation of an environment that makes it virtually impossible for an employee or patron to steal sensitive cardholder data.

## The role of POS software in PCI

As can be seen in a quick look at the 12 steps, the POS system **plays a minor but vital role in overall PCI compliance.**

PA-DSS validated POS software (such as Dinerware versions 2.8.2 and higher) encrypts credit cards for storage and transmission, so those aspects of the 12 steps are met in regards to the processing of credit cards.

# Extras

64

The logging function in Dinerware assists in the conformity of other steps that refer to tracking access to cardholder information over time and the need to make those logs available in the event of a breach.

## What is DSS?

DSS stands for 'Data Security Standards.' These standards are divided into four key areas:

1. **Security management**
2. **Policies and procedures**
3. **Network architecture**
4. **Software design (POS)**

PCI compliance is a continual, cyclical process. Merchants must assess, remediate and report in a continuous cycle.

The security standards council website addresses these three points:  
[https://www.pcisecuritystandards.org/security\\_standards/getting\\_started.php](https://www.pcisecuritystandards.org/security_standards/getting_started.php)

## What if a merchant fails to comply with mandates?

Suspension/Revocation of merchant accounts  
Fines up to \$50,000/day  
Total liability for all fraud losses incurred

## What are the consequences in the event of a breach?

Suspension/Revocation of merchant accounts  
Fines of \$500,000 per incident  
Total liability for all fraud losses incurred  
Total liability for the cost of re-issuing compromised cards





# The Pay Card Industry

## An overview of the 12 steps of PCI compliance

### Step 1. Install a firewall to protect cardholder data

**What this means** — A router (physical firewall) must **isolate** the credit card processing computers on a network that is password protected from any other networks, especially public-facing Wi-Fi. This is why Dinerware strongly recommends to keep the router used for your Dinerware system to be **dedicated solely for the system itself**.

### Step 2. Do not use vendor-supplied defaults for system passwords and other security parameters

**What this means** — Equipment such as routers and computers are shipped from the factory with default passwords. These passwords must be changed upon installation to unique and strong passwords that contain numbers, letters, and symbols. Confirm with your Dinerware installation manager that any factory defaults have been changed to unique, strong passwords.

### Step 3. Protect stored data and secure the encryption key

- Number, expiration date, name, service code
- No PIN numbers, pin block, CVV, etc
- Do not store track data
- Document and implement key management procedures
- PAN (Primary Account Number)

It is the payment card number (credit or debit) that identifies the issuer and the particular cardholder account. It is also called the account number.

**What this means** — Merchants must securely store and manage credit card data, the encryption key, and their passphrase as well as create a set of written policies that are communicated clearly to restaurant staff. Your Dinerware installation manager will provide you with an encryption key and passphrase.

# Extras

66

## Step 4. Encrypt cardholder data across open, public networks

- POS/Dinerware to processor and bank
- Internet

*What this means* — Use strong encryption methods and security and do not transmit any cardholder data over the Internet.

## Step 5. Use and regularly update anti-virus software

*What this means* — Install and continuously update your anti-virus software. Dinerware recommends Microsoft Security Essentials or AVG, both of which are free under certain conditions.

## Step 6. Develop and maintain secure systems and applications

- Install current vendor-supplied security patches for operating systems and applications
- Establish a process to monitor update availability
- Establish rules for public internet access

*What this means* — All applications, especially operating systems, must be updated, and access to outside networks must be minimized and monitored.

## Step 7. Restrict data access to business need-to-know, and manage data access by employee (set specific privileges)

*What it means* — All access to cardholder data should be limited only to those who need it to perform their job.

## Step 8. Create and enforce strong password use

- Assign a unique ID to each person with computer access
- Change the ID every 90 days
- Use secondary authentication (password, etc)

*What it means* — All employees with access to systems or cardholder data must provide ID prior to access.

## Step 9. Restrict and monitor access to data and devices

- Restrict physical access to cardholder data
- Restrict access to network devices
- Manage and log access to data

*What it means* — Manage networks and data storage to prevent unauthorized access and removal of data from the premises.

## Step 10. Track and monitor all access to network resources and cardholder data

- Link all data access to individual users
- Develop secure audit trails
- Review logs daily (data retention for one year, 90 days readily available)

*What it means* — All access to data should be logged and associated with individuals for tracking and analysis, should something go wrong.

## Step 11. Regularly test security systems and processes

- Test components, processes and software
- Perform scans and penetration tests

*What it means* — Test your network and systems frequently to determine how safe they are.

## Step 12. Create, communicate and enforce security policies

- Maintain a policy that addresses information security
- Establish, publish, maintain and communicate your security policy to all staff

*What it means* — It is your responsibility as the merchant to establish policies and educate your staff on the changes necessary to become compliant.

# Extras

68

## Summary of PCI Compliance

- Build and maintain a secure network
- Protect cardholder data
- Maintain a vulnerability management program
- Implement strong access control measures
- Regularly monitor and test networks
- Maintain an information security policy

**A PA-DSS validated point-of-sale (POS) software fits into the overall PCI Compliance but it will not make any merchant compliant!**

The first step of becoming PCI compliant is to install POS software that has been validated by the Security Council. Merchants will never be PCI compliant without taking this first step!

**As a PA-DSS validated application, the Dinerware software can assist merchants in the PCI compliance process in the following ways:**

- Cardholder data is encrypted (step 3)
- Network traffic is encrypted (step 4)
- Access requires double authentication (steps 8, 9)
- Access is logged (step 10)

PA-DSS is the most current generation of PCI-Compliance standards for validated payment applications (often housed within the POS system)

From the PCI Security Standards Website: Dinerware 2.8.2 (released February 2009) is a PA-DSS validated payment application

[https://www.pcisecuritystandards.org/security\\_standards/vpa/vpa\\_approval\\_list.html](https://www.pcisecuritystandards.org/security_standards/vpa/vpa_approval_list.html)

# Dinerware glossary

## Automatic Discount

An option to set a discount for a specific time of day, time of week or date

**Example:** A bar has half-price appetizers during happy hour. The manager sets an automatic 50% discount that applies to all appetizers from 5:00pm-7:00pm, Monday through Thursday.

## Brain

The control center of Dinerware that routes requests from Dinerware workstations; the Brain manages access to the SQL Server database and provides much of the system processing power.

## Choice

A menu item customizer — adds or subtracts an ingredient or side dish

**Example:** A restaurant offers blue cheese. Blue cheese is an available choice for salads or steaks.

## Choice Set

A group of choices that apply to a menu item

**Example:** A local pub offers nachos (the menu item) with the customer's choice of onions, guacamole, and jalapeños (the choice set).

## Daily Report

A summary of all areas of operations, including total sales, tips, and cash deposit

## Fast Pay

A feature in Dinerware that allows users to quickly create and close a ticket when paying with cash

# Extras

70

**Example:** A club patron orders a whiskey sour and pays cash. The bartender selects the drink from the menu then touches the Fast Pay button. The ticket closes and the bartender is free to help another customer.

## Fresh Sheet

A feature specifying how many menu item portions are available

**Example:** A chef picks up 10 portions of fresh tuna. The manager includes this item and its quantity in the fresh sheet to track how many portions have sold and how many items remain in real time.

## Item Group

A group of menu items, organized by type.

**Example:** In a fine-dining restaurant, a manager assigns appetizers, entrees, and desserts to separate item groups. He is then able to designate appetizers as a first course, entrees as a second course, and desserts as a third course. When the order prints in the kitchen, it will print by order of course, saving the chefs from having to analyze each ticket.

**Example:** In a bar, a manager assigns all of the Micro Draft beers to a common item group. All of the Micro Draft items may be assigned a price or happy hour discount in just a few steps.

## Job

A set of options that customize the functionality available to a type of user (bartender, server, dishwasher)

## Keypad

An onscreen numerical keyboard on the touchscreen

## Labor Screen

A manager view that shows clocked-in employees and provides information about which job and shift an employee worked in a given period

## Management Functions

A set of system options for managers

## Manager Screen

A view of manager functions for customization, adding content and accessing reports

## Menu Item

An item on the menu, added to the POS system

## Order Entry Screen

The place users add orders and access system functionality

## Personal Page

The screen staff can use to send and receive messages, clock out, calculate tip total and generate daily reports

## PIN

A unique four digit Personal Identification Number used to login to the system

## POS

POS (Point of Sale) is a computer system used to route, store, and report customer orders and sales information

## Revenue Center

An area of the business handled separately by the software that provides sales tracking, accounting and transaction control

**Example:** A chain pizzeria offers sit-down dining, take out, and delivery. The manager sets up a revenue center for each type of transaction can track sales for each section of the business.

# Extras

72

## Revenue Class

A group of menu items that share tax and accounting rules

**Example:** A sports bar offers merchandise in addition to food and beverages. The manager sets up two revenue classes so that each type of menu item can be taxed at the appropriate rate. The restaurant sells Gift Cards, and the manager designates these as non-sales revenue so they will be subtotaled separately for the bookkeeper.

## Section

A group of tables or an aspect of the business, such as delivery or carry out, represented in the POS system. Sections allow managers to enforce rules, such as requiring a guest count, customer name or delivery time.

## Screen Category

A group of menu items that appear together on the main order screen

**Example:** A coffee shop offers espresso drinks, sandwiches and pastries. The manager sets up three screen categories, one for each type of menu item. A customer orders a latte. The cashier selects the “espresso drink” screen category and chooses latte from the menu.

## Table

A virtual table in Dinerware that represents an actual table in the establishment

**Example:** The waiter chooses “Table 4” for a ticket. Later, another party sits in the same location, but the previous ticket has not yet been closed. Dinerware automatically names the new ticket “Table 4:2”

## Ticket ID

A unique number automatically assigned to each ticket by the program

## Workstation

A touchscreen used by employees to access the system



# Index

- Bar tabs .....49
- Barcode scanning.....50
  - Setup.....51
- Cash drawer error ..... 31-32
- Changing payment processors ..... 6
- Choice sets**
  - Add .....40
  - Menu ..... 14
- Choices**
  - Add .....39
  - Menu ..... 14
- Combine tickets .....58
- Commit open ticket.....59
- Construction, complete ..... 7
- Credit card**
  - Processing, troubleshoot..... 30-31
  - Reader (MSR) cleaning.....26
  - see also Merchant account*
- Customer history .....57
- Daily message..... 47-48
- Data Security Standards (DSS).....64
- Database**
  - Archiving ..... 20-21
  - Backup and archives..... 18
  - Automated ..... 19
  - Copy to outside source..... 21-22
  - Manual..... 19-20
  - Blank..... 34-35
  - Sample.....34
- Discounts**
  - and voids ..... 15
  - Happy hour .....47
- Electrical installation, complete ..... 7
- Employee**
  - Add .....44
  - Discounts..... 15
  - Names, first and last ..... 15
  - PINs..... 15
- Equipment**
  - Add, move or remove .....26
  - Care.....24
- Error**
  - Messages .....31

# Extras

74

Cash drawer .....	31-32	<b>Menu</b> .....	34
Fresh sheet.....	48	Checklist.....	14
Friends and family discounts .....	15	Items.....	14
Glossary of terms.....	69	Add .....	37-38
Item lookup function .....	60-61	Edit for UPCs/SKUs .....	51
<b>Item groups</b> .....	36	Set tax rates for.....	42
Add .....	36-37	Setup.....	35
Happy hour discounts .....	15, 47	<b>Merchant account</b>	
Hours of operation.....	16	Activation .....	5
Installation .....	17	System synch .....	13
<b>Internet</b>		Message of the day.....	47-48
Installation .....	4	Move a terminal.....	25
Modem.....	4	Names, employees first and last .....	15
Router .....	4	Neighborhood discounts .....	15
Item groups, menu .....	14	Networking.....	10
<b>Jobs</b>		One touch login (OTL) .....	45
Add .....	43	Onsite installation .....	17
Assigned to employees .....	15	Pay rates by job .....	15
Define types .....	15	<b>Pay tickets</b>	
Kitchen staff attributes.....	44	Cash .....	55
Managers attributes .....	43	Credit Card .....	55-56
Servers and cashier attributes s .....	44		

Payment processor tips.....	5	Summary or page .....	52-53
<b>PCI (Pay Card Industry) compliance</b>		<b>Revenue classes .....</b>	<b>35</b>
About .....	62-68	Add .....	36
Breach .....	64	Assign a tax to.....	42
For restaurant owners.....	63	Menu .....	14
Merchant failure to comply.....	64	Scanning, barcode .....	50
Overview, 12 steps .....	65-68	<b>Security settings.....</b>	<b>45</b>
Role of POS software.....	63	Add .....	41-42
Summary .....	68	Assign to revenue class .....	42
<b>PINless</b>		Rates per menu items .....	42
Security privileges.....	45	Screen, cleaning.....	26
Function setup.....	45-46	<b>Screen categories</b>	
PINs, employee.....	15	Add .....	38-39
Power conditioners.....	24	Menu .....	14
Pre-installation checklist.....	11	Screen name, employees.....	15
<b>Printer</b>		Send open ticket.....	59
Settings .....	26	Shielded Cat5 cabling.....	5
Cleaning .....	25	Shift, edit .....	46
Testing .....	24	<b>Shutdown system</b>	
Reboot the computer .....	29-30	Hard reboot .....	24
<b>Reports</b>		Proper .....	23
Daily.....	52	<b>Site</b>	
Payroll .....	53-54		
RFO (restaurant financial overview)..	53		
Shift .....	54-55		

# Extras

76

Readiness checklist.....	11	Typical café/quick service.....	55
Readiness description.....	4	Typical fine/casual dining.....	56
Installation ready.....	8-9	Pay to cash.....	59
<b>Software</b>		Pay with cash.....	55
Add.....	27	Pay with credit card.....	55-56
Setup.....	12	Rename.....	60
Updates.....	32	Send.....	59
<b>Stock-Keeping Units (SKUs)</b> .....	50	Share items.....	56
Edit menu item for.....	51	Split into two tickets.....	57
Search for an item via.....	51	Transfer.....	58
<b>System</b>		Troubleshoot not printing.....	30
Automatic backups.....	16	View all.....	58
Maintenance.....	28	<b>Tip</b>	
Reboot.....	23-24	Assign to credit card.....	59
<b>Taxes</b> .....	40-41	Assign to ticket.....	59
Menu.....	14	Training.....	33
Terminal wiring diagrams.....	10	Transfer tickets.....	58
<b>Tickets</b>		Troubleshooting.....	29-32
Add guest to.....	60	Voids.....	15
Assign tip.....	59	Universal Product Codes (UPCs).....	50
Combine.....	57, 58	Edit menu item for.....	51
Commit.....	59	Search for an item via.....	51
Open			
By customer.....	57		
From order history.....	57		
With new ticket.....	58		
Typical bar/nightclub.....	55		