Module 4 – The Pilot POS System for Supervisors and Managers

Overview

It is important for Supervisors or Managers to firstly understand what their business roles and responsibilities are, and then secondly, to have a good working knowledge of how the Pilot POS system can help them manage the important daily business processes.

The learning and communication objectives for this module:

By the end of this module, you will be able to:

- Review the roles and responsibilities of the Supervisor or Manager when working with the Pilot POS System
- Practice the full range of management POS tasks and procedures and routines to ensure that the business operates efficiently and effectively
- Know how to make Table Bookings on the POS system
- Practice the procedures and routines to start, view and work with the Table View and Host functions
- Recognise the power of the visual references of the POS screen (knowing the status of different tables)
- Practice the procedures required to work with the Quick Table, Take Away and Delivery functions
- Practice the procedures and routines to display information relating to items that are not available
- Practice the tasks and functions to transfer tables and items between tables
- Review the range of discounts that are allowed on the Pilot POS system
- Practice the procedures related to working with discounts and promotional items
- Practice the procedures and routines to edit, void and discount bills.

Reviewing Roles and Responsibilities of Supervisors, Managers and Site Operators

Supervisors and Managers have a wide range of responsibilities and tasks to perform, but within the context of Pilot POS System there are some responsibilities that are fundamental to an efficient and profitable business:

- Preventing Theft and Fraud through the POS system
- Managing Transaction and Stock Information of Tables
- Managing Cash, Cash Up Procedures and Floats
- Use the Touch POS System to Find and Manage Information
- Transferring Tables and Items between Waitrons
- Splitting, Transferring and Merging Bills
- Working with Discounts and Promotional Items
- Editing and Voiding Items from Bills.

Think and Do!

Preventing Theft and Fraud Through the POS System

- Managing staff login names and passwords.
- If finger print identification is not set up, ensure that every employee has their own swipe card whenever they are on duty.
- Strictly manage the use and distribution of magnetic cards where applicable.
- Carefully follow the procedures for managing the voiding and discounting of bills.
- Monitor the issuing of customer orders and order slips from the kitchen, soda fountain and barista areas.
- Monitor and manage “rolling orders” and tables that stay open for long periods of time.
- Carefully manage split bills and transfers.
- Manage the actual time that tables can be open for.
- Strictly manage and if possible eliminate any reasons for order cancellations.

Think and Do!

Using the Touch POS System to Manage the Transaction and Stock Information of Tables

The responsibilities of managers and site operators can be summarised as managing stock and transaction information. There are a number of important reasons for dealing with this aspect of the job with diligence and a full understanding of what happens behind the scenes of the business.

- Constantly monitor and manage cancellations and corrections of bills.

  Remember Cancellations and error corrections are strictly monitored by the Pilot POS system. So, strictly speaking, if it is picked up on a regular basis, it simply means that somebody may be trying to defraud the system.
- If there are too many corrections of transactions and stock information on tables, this could be an indicator that additional training may need to take place.
- During cash up you have an opportunity to quickly review how your staff is helping you to manage transaction and stock information.

Think and Do!

An Overview of Additional Supervisor and Manager Tasks and Procedures

The Pilot Touch POS system has a number of functions that can be used to manage the transactions and requests taking place for customers and their tables.

- Managing Tables
- Managing the Quick Table, Take Away and Delivery Functions
- Managing the Transfer and Merging of Table Information and Stock Items
- Working with Discounts and Promotional Items
- Changing and Voiding Bills
- Viewing and Closing Bills.

Think and Do!

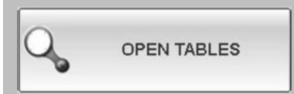
Managing Tables

The Pilot POS software system provides functionality such as table bookings, a bird's eye-view type hosting function and the ability to view the details of specific tables. This functionality ensures that with all the hustle and bustle of daily business, management and staff can offer professional service to tables and customers.

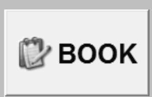
Making Table Bookings

Use the following procedure as a guide to make table bookings:

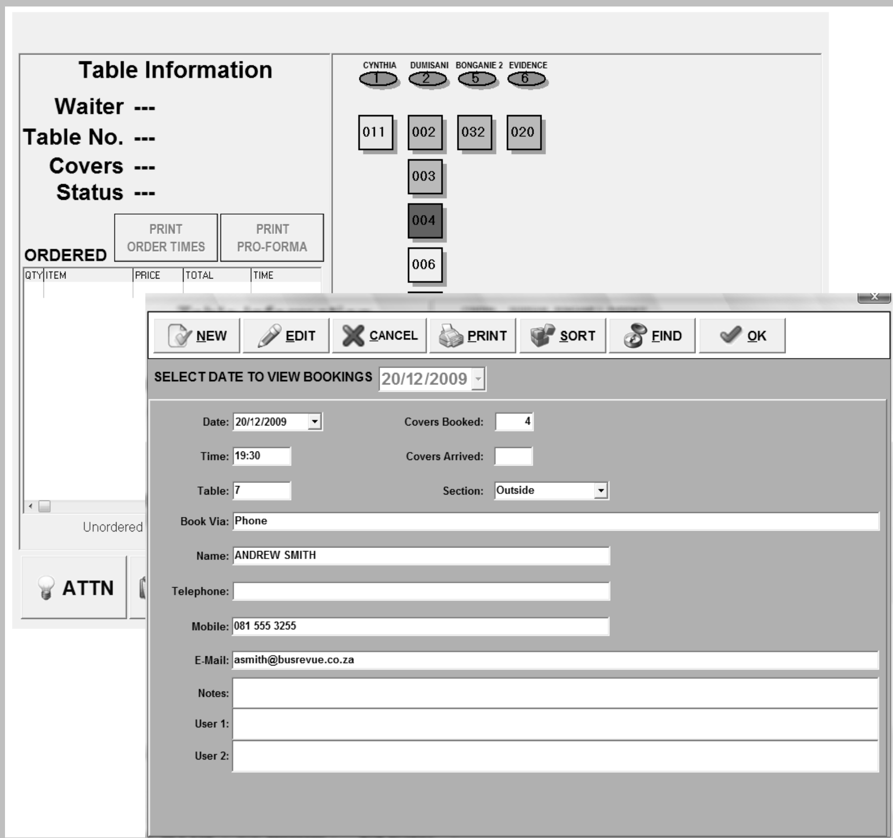
1. From the Pilot Touch POS program, click on the Open Tables button to display the Table Information window:



2. Click on the Book button to display the Bookings working window:



3. Click on the New button to display a working window where you can capture the customer booking request and information.
4. When you have entered the appropriate information, click OK to finalise the booking on the system.

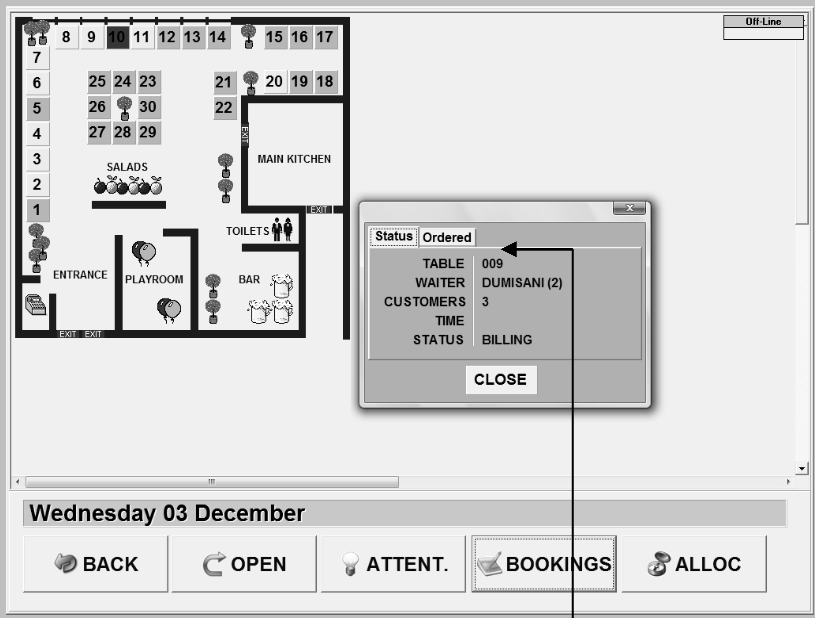


Using the Table View and Host Functions

Use the following procedure as a guide to working with the Table View and Hosting function:

1. From the Pilot Touch POS program, click on the Floor Plan button, swipe your card or use the Finger Print ID terminal to display the Hosting Information window:

2. Click on a table icon on the bird's eye-view to display waiter and table information.
3. Use the Open button to open and view the details of specific tables.
4. Use the Attention button to highlight the table and indicate to the waitron that there are issues that need to be managed.
5. Click on the Bookings button to open the Bookings window.



Click on the Ordered tab to view the items that have been ordered for the table.

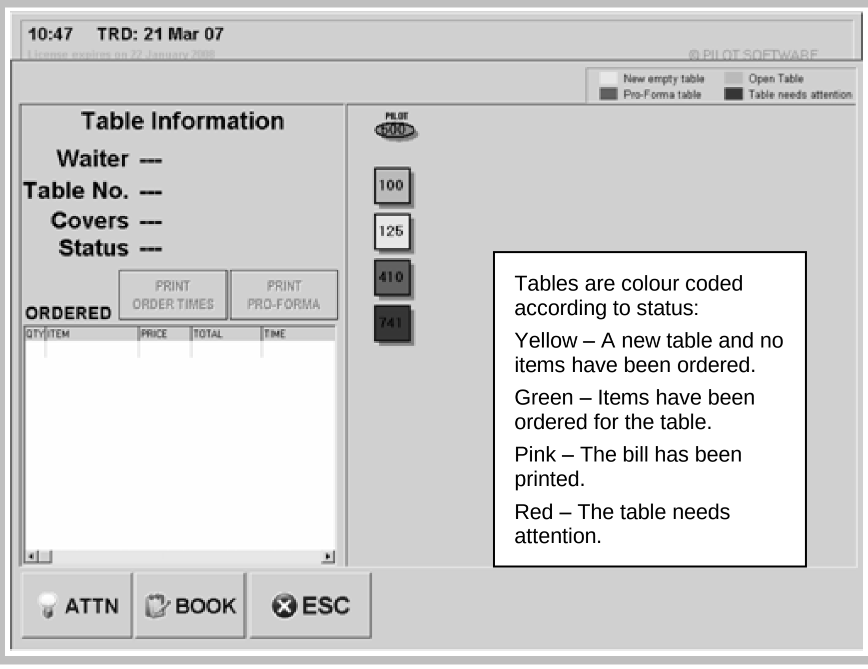
Viewing the Status of Different Bills and Tables

Use the following procedure as a guide to viewing the status of bills and tables:

1. From the Pilot Touch POS program, click on the Open Tables button, swipe your card or use the Finger Print ID terminal to display the Hosting Information window:

2. Select a table icon to display transaction and waiter details.

   Note that any items displayed in red have been recorded on the system but have not been ordered.
3. Click on Esc to return to the POS desktop.



Tables are colour coded according to status:

Yellow – A new table and no items have been ordered.

Green – Items have been ordered for the table.

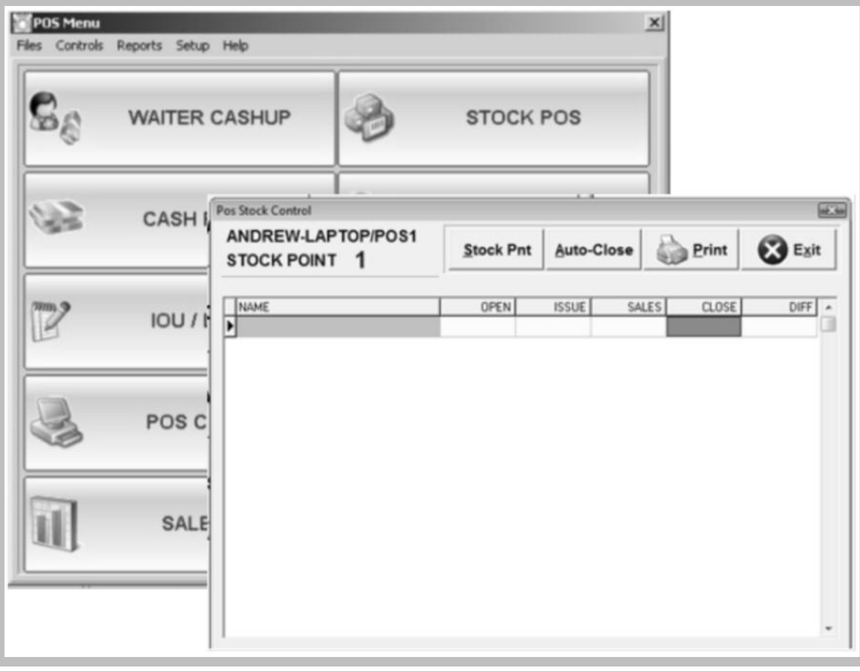
Pink – The bill has been printed.

Red – The table needs attention.

Displaying Information Relating to Items that are Not Available

Note This functionality is site specific.

Use the following procedure as a guideline to viewing stock items that are available:



1. From the Pilot Touch POS program touch on the Manager Menu button and enter your User PIN to display the POS Menu window:

2. Touch on the Stock POS button and enter your User PIN to display the POS Stock Control window:

3. Use this window to view and confirm the stock that is available for sale.

Reviewing the Quick Table, Take Away and Delivery Functions

This functionality is typically used when there is a need for fast service and transactions, for example a bar, over the counter sales or take-away outlets.

The Quick Table Function

The staff member can open a quick table, ring up items and cash this bill off immediately. Quick tables automatically reopen after being paid so that the staff member can ring up the next transaction. Quick table functionality needs to be allocated in POS System set up before it is operational.

Opening a Quick Table

1. Swipe the waitron's card or use the Finger Print ID terminal to open a Quick Table.
2. Enter the Quick Table number.
3. If you are opening the table for the first time that day, confirm that this is a new table by touching Yes. The items screen will be displayed.

Using the Quick Table Function

1. Select the items you want.
2. Press Enter until the billing screen appears.
3. Enter the amount paid using the number pad on the right.
4. Select the payment type (if asked).
5. Touch Enter to continue.
6. The system automatically re-opens this quick table and leaves the user on the items screen, ready for the next bill.

Placing Orders

Although this happens very rarely, you may want to place orders to kitchen printers using the Quick Table function.

1. Select the items you want.
2. Touch Order.
3. Select the Quick Table by touching the table block on the top left of the screen.
4. Continue with the billing procedure.

The Take Away and Delivery Functions

These functions are used for take away and delivery orders and are used in conjunction with the Quick Table function. However, this function includes a reference number on the receipt and the order slip. This enables you to match bills to orders.

The Take Away waitron or section number needs to be allocated in the POS System set up before you can work with it.

The Delivery function is designed to record important customer information. This allows you to search for customer details and avoid asking for information every time they order. The delivery waitron number needs to be allocated in the POS System set up before you can work with it.

Opening a Take Away Table Function

1. This action only needs to take place once a day, because once the Quick Table has been opened using the take away waitron number, it will stay open for the rest of the day.
2. Swipe the take away waitron's card and enter the take away waitron's PIN.
3. Enter the quick table number.
4. If you are opening the table for the first time that day, confirm that this is a new table by touching Yes.
5. This takes you to the items screen.

Using the Take Away Table Function

1. Select the items you want.
2. Press Enter until the billing screen appears.
3. The system will print the orders to the various kitchen sections, with a reference number on the top of the slip.
4. Enter the amount paid using the number pad on the right.
5. Select the payment type (if asked).
6. Touch Enter to continue.
7. The system will print out a receipt for the client. The same take away reference number on the order slip is printed at the bottom of the receipt.
8. The system automatically re-opens this quick table and leaves the user on the items screen, ready for the next bill.

Extra Notes

Using the Delivery Table Function

1. Type in the customer's telephone number or surname.
2. Once the customer is highlighted, touch OK.
3. Select the items you need to order.
4. Press Enter, the system will print the orders to the various kitchen sections, with a reference number on the top of the slip.
5. Confirm the amounts and touch Enter to continue.
6. The system will print out a receipt for the client. The same delivery reference number on the order slip is printed at the bottom of the receipt. Notice that the customer's details are printed on the receipt.
7. The system automatically reopens the Delivery Table and is ready for the next bill.

Adding Specific Notes for a Single Order

1. This feature is used to add specific instructions that a customer may have requested. These instructions are attached to the specific order.
2. Enter the customer's telephone number or surname.
3. Once the customer is highlighted, touch OK.
4. Touch Notes.
5. Type in the specific instructions that the client has given.
6. Continue as per normal with the Delivery Table procedures.
7. These instructions will print on the order as well as the customer's receipt.

Adding a Client

1. Touch Add.
2. Capture the customer's details.

Note Any comments captured under the Notes field will print on every order that this client places with you. This field should be used to make permanent comments for the selected customer, for example address and direction information.

Editing a Client

1. Select the customer you need to edit.
2. Touch Edit.
3. Make the necessary changes.

Extra Notes

Setting Up PLU Stock Warnings

Use the following procedure to setup PLU stock warnings:

1. From Touch POS select Manager Menu and enter your manager's pin.
2. Select the Controls menu option.
3. Select the PLU stock Warning menu option.
4. Use the working window to set warnings and messages to show staff what is low or out of stock.
5. This has to be entered and updated on a daily basis.
6. Once you have set up your warnings and messages upon exiting you will be asked to update PLU Stock Warnings.

Managing the Transfer of Tables and Stock Items

The Pilot POS system has functionality and reporting options to manage this sometimes difficult and frustrating part of business.

Warning – Fraud and Theft!

Try as much as possible to avoid transferring tables and items between waitrons. This is often used to defraud the system by trying to confuse bill totals, stock taking and cash up procedures. If you notice staff members doing this often, ask questions and monitor their behaviour.

Remember to use the information of the Day End report to monitor the splitting and transferring of tables.

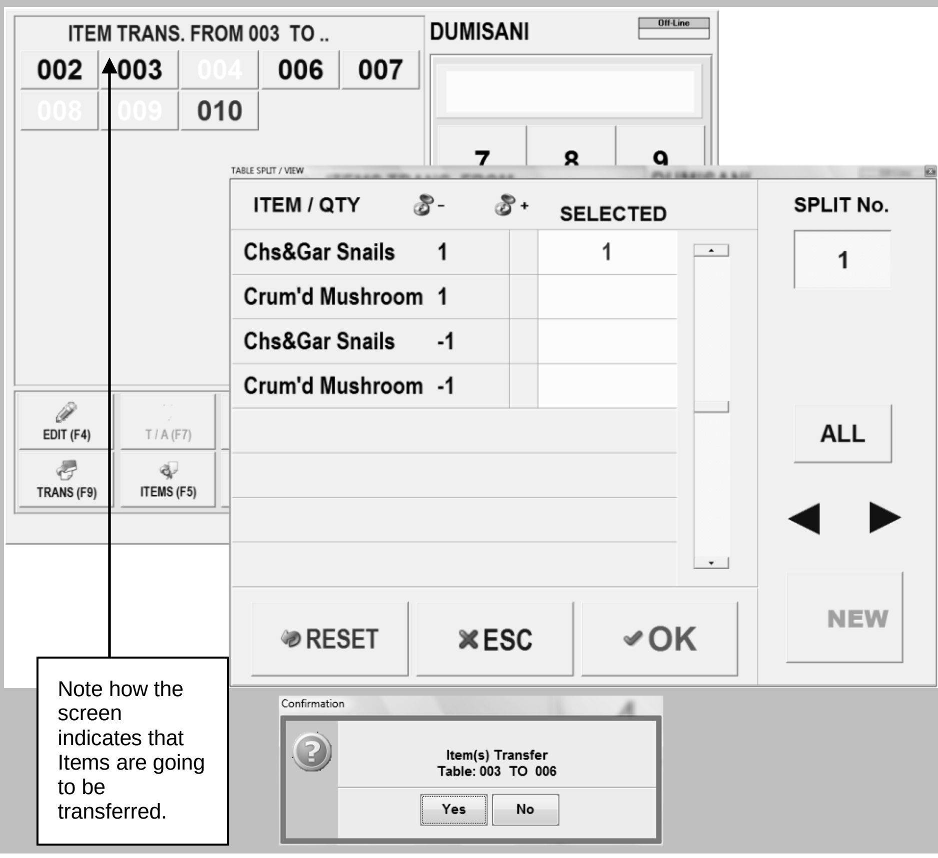
Transferring Items for the Same Staff Member

The Transferring functions allow you to transfer items from one bill to another and also to merge tables. This is useful if you need to transfer items for separate billing and customer movement within your restaurant.

Use the following procedure as a guideline to transferring items for the same staff member:

1. Enter the Touch POS system by swiping the staff member's card, entering their staff number or using the Finger Print ID terminal.
2. Touch the Items button:

3. Select the table from which you want to transfer from by touching the Table button. The Table / Split View window will be displayed.



Item Transfer – Same staff member – Existing table

4. If you are transferring items for the same staff member but on existing tables, select the table from which you want to transfer the item to by touching the table block.
5. Authorise the task by entering your management pin, swiping your manager card or using the Finger Print ID terminal.
6. Select the table from which you want to transfer from by touching the table button. The Table / Split View window will be displayed.
7. Enter how many items need to be transferred in the Selected column.
8. Touch on OK. You will be returned to the Table view window.
9. Select the table that you want to transfer the item to. Confirm the transfer from the selected table to the next table by touching Yes.
10. Return to the Pilot Touch POS desktop.

Item Transfer – Same staff member – New table

4. If you want to transfer items for the same staff member, but to a new table, enter the table number using the number pad.
5. Authorise the task by entering your management pin, swiping your manager card or using the Finger Print ID terminal.
6. Select the table number that you want to transfer from by touching the table button. The Table / Split View window will be displayed.
7. Select the item and number that needs to be transferred in the Selected column.
8. On the number keypad, enter the number of the new table that needs to be created.
9. Touch the Enter button and then confirm the number of covers / customers.

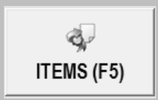
10. Touch Enter to confirm that it is a new table by touching Yes.
11. Confirm that you are transferring items by touching Yes.
12. Authorise the task by entering your management pin, swiping your manager card or using the Finger Print ID terminal.

Extra Notes

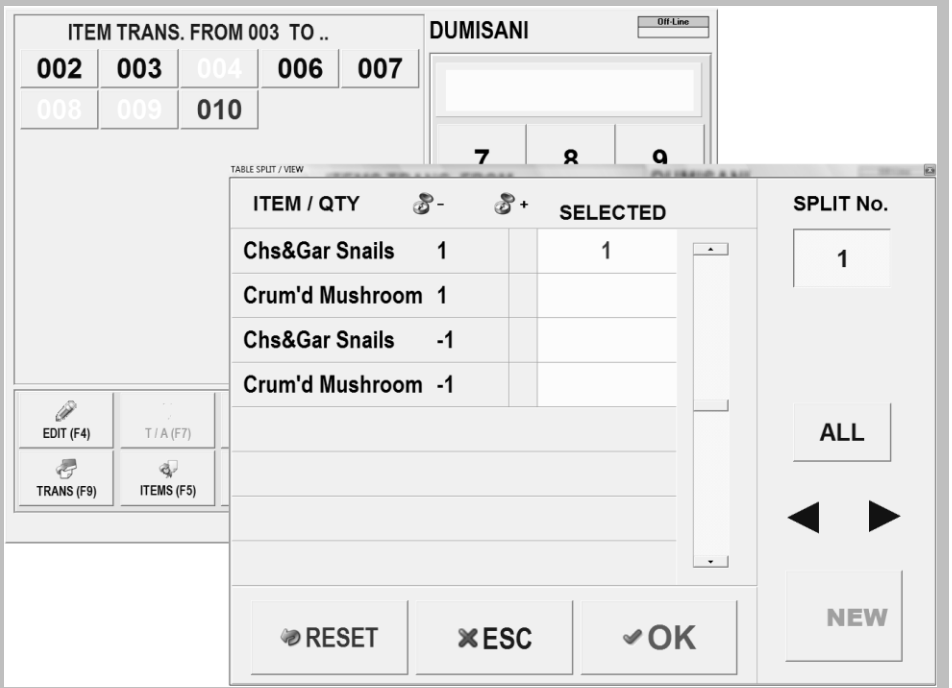
Transferring Items for Different Staff Members

Use the following procedure as a guideline to transferring items between different staff members:

1. Enter the Touch POS system by swiping the staff member's card, entering their staff number or using the Finger Print ID terminal.
2. Touch the Items button:



The table and waiter information window will reflect items that can be transferred.



Item Transfer – Different staff members – Existing table

3. If you are transferring items between different staff members but on existing tables, select the table from which you want to transfer from by touching the table button. The Table / Split View window will be displayed.
4. Select the item that needs to be transferred.
5. Confirm the number of items that need to be transferred.
6. Touch on OK. The system will require you to confirm the table that the item needs to be transferred to.
7. Select the table number that you want to transfer to.
8. Enter your management pin, swipe your manager card or use the Finger Print ID terminal.
9. Return to the Pilot Touch POS desktop.

Item Transfer – Different staff members – New table

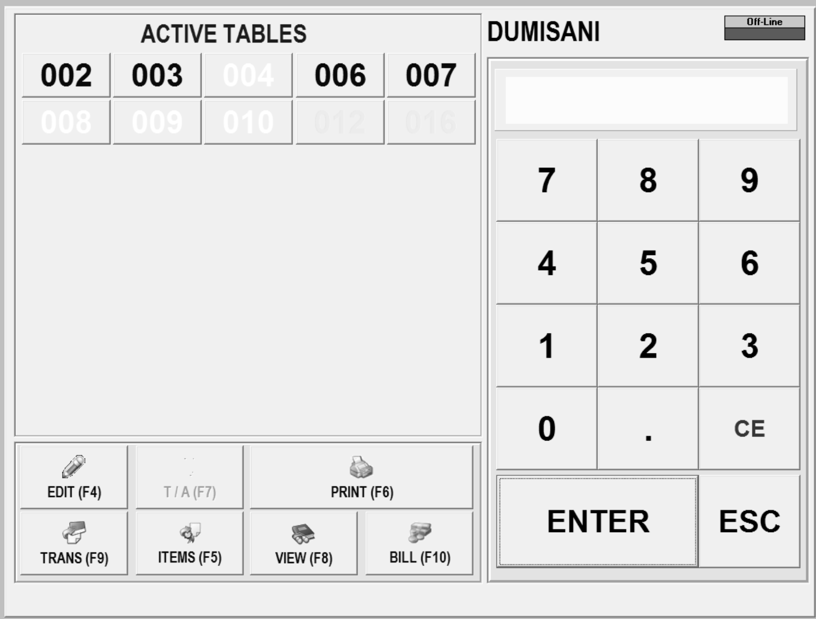
3. If you are transferring items between different staff members but to a new table select the table from which you want to transfer from by touching the table button. The Table / Split View window will be displayed.
4. Select the item that needs to be transferred and touch OK.
5. Enter the table number that you need to transfer the item to.
6. Enter the waitron's number.
7. Confirm the number of covers (customers).
8. Confirm the transfer from the one table to the other by touching Yes.
9. You will see the new table block appear in the table screen.
10. Return to the Pilot Touch POS desktop.

Transferring Tables from One Shift Member to Another

Use the following procedure as a guideline to transferring tables:

1. Login to the Touch POS system as a manager.
2. Select the Trans button to begin the process to transfer tables:

3. Select the table you want to transfer from by touching the table block.
4. Enter your management pin, swipe your manager card or use the Finger Print ID terminal.
5. Use the number pad to enter the new table number that you want to transfer to.
6. Enter your management pin, swipe your manager card or use the Finger Print ID terminal.
7. Confirm the transfer from the one table to the other by touching Yes.

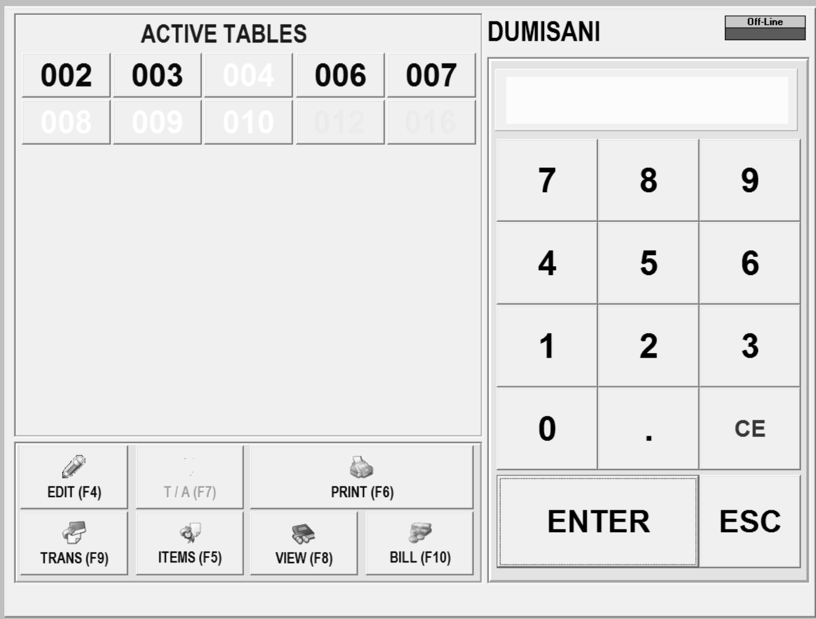


Extra Notes

Merging Tables for Staff Members

Use the following procedure as a guideline to merging tables:

1. Login to the Touch POS system as a manager.
2. Swipe the waitron's card or use the Finger Print ID terminal.
3. Touch the Trans button.
4. Select the table you want to transfer from by touching the table block.
5. Enter your management pin, swipe your manager card or use the Finger Print ID terminal.
6. Select the table you want to transfer from by touching the table block.
7. Enter the waitron's number.
8. Confirm that it is a new table by clicking Yes.
9. Authorise the task by entering your management pin, swiping your manager card or using the Finger Print ID terminal.
10. Confirm the transfer from the one table to the other by touching Yes.



Extra Notes

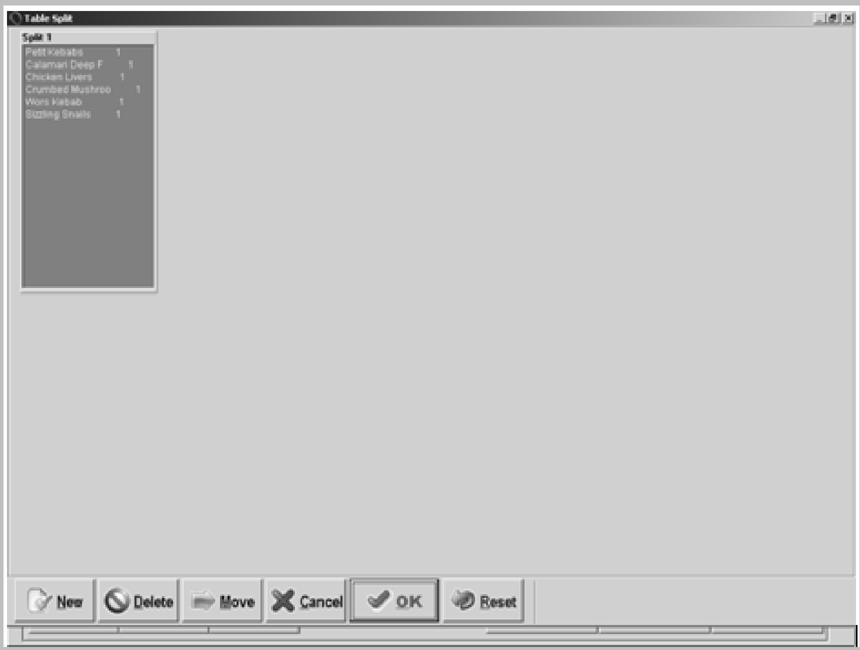
Splitting Bills

The Touch POS system allows you to manage split or separate bills for any table. You can have as many splits per table as the staff member can handle, all with different items on them. This makes it easier when billing customers on the same table who want to pay separately.

Use the following procedure as a guideline to splitting bills:

Creating new splits

This function must be used before any items are added to the bill. When the staff member first enters the table, they must create as many splits as they need, and then continue to place orders on the different splits.



1. Swipe the waitron's card or use the Finger Print ID terminal.
2. Select a table, or open a new table.
3. Select the spilt button on the Pilot POS screen.

4. You now see the Table Split / View screen.
5. Touch New.
6. Touch Split.
7. You will now see that there are two splits shown. Keep adding splits until you have the desired amount.

Placing Orders on Separate Splits

8. Once you have created all the splits that you need, you can begin to place orders on these splits.
9. Swipe the waitron's card or use the Finger Print ID terminal.
10. Select the table.
11. Touch Split.
12. You now see the Table Split / View screen.
13. Select the split that you want to add to by touching the split number on the top right. Use the left and right arrow buttons to navigate to more or previous splits.
14. Once you have selected the split, touch OK.
15. Ring up the items for this split.
16. When you want to choose a new split, touch Split and select the new split.
17. Once you are finished, touch Order.

Resetting Splits

18. This function can be used to scrap all splits on a table. It will combine all the items together.
19. Swipe the waitron's card or use the Finger Print ID terminal.
20. Select the table.
21. Touch Split.
22. You now see the Table Split/View screen.
23. Touch Reset.
24. Confirm the reset action by touching Yes.
25. You will see all the splits on the right disappear and all the items will appear on split one.

Billing a Split Bill

26. When you want to bill a table that has separate splits, you have the option of billing each split separately.
27. Swipe the waitron's card or use the Finger Print ID terminal.
28. Touch Bill.
29. Select the table by touching the table block.
30. At the Tender screen, touch Split.
31. Select the split that you want to tender for.
32. Touch Ok.
33. Tender an amount and payment type.
34. The system then displays the remaining outstanding amount on the bill.
35. If you want to print a tax invoice for the split, then touch Copy now.
36. Repeat the above steps until all the splits have been tendered.
37. If you escape without tendering for all the splits, the system will leave only the outstanding balance for tender for a later stage. This is useful if one party at a table decides to leave early.

Splitting a Bill at Billing Stage

38. If you did not create splits for the table at the beginning, you can still tender items on separate bills. Instead of choosing splits to bill, the waitron actually selects items to bill for.
39. Swipe the waitron's card.
40. Touch Bill.
41. Select the table by touching the table block.
42. At the Tender screen, touch Split.
43. Select the items that you want to bill for.
44. Click Ok.
45. Tender an amount and payment type.
46. The system then displays the remaining outstanding amount on the bill.
47. If you want to print a tax invoice for the billed items, then touch Copy now.
48. Repeat the above steps until all the items have been tendered for.
49. If you escape without tendering for all the items, the system will leave only the outstanding balance for tender for a later stage. This is useful if one party at a table decide to leave early.

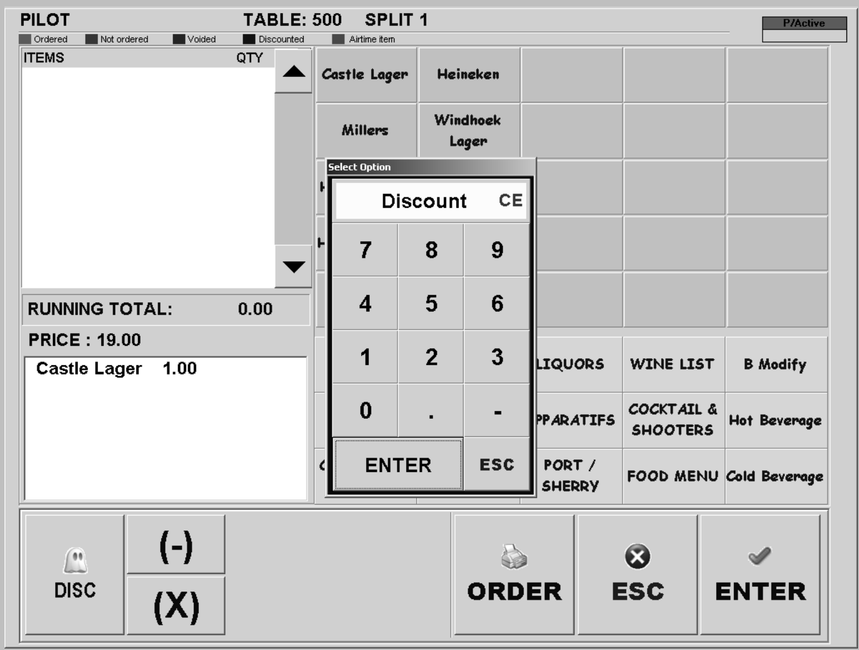
Working with Discounts and Promotional Items

The Discounting functions are used to reduce the value of an item or a bill. The Pilot POS system allows for percentage or value discounts on both item and bill discounting. This function is also used when you want to ring up items to reduce your stock, but not charge for them.

Discounting Items on a Bill

This function is used to give an amount or a percentage discount on one specific item. You can also use this to reduce your stock levels, but not charge the customer.

Use the following procedure as a guideline:

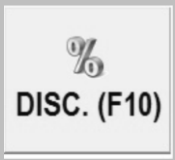


1. Open the table where you want to give an item discount.
2. Ring up the item.
3. Before you move the item to the item listing box, touch Disc.
4. Enter your management pin, swipe your manager card or use the Finger Print ID terminal.
5. If you want to give a value discount, touch Minus and enter the value amount. Please note that you cannot give a value discount for more than what the item is priced.
6. If you want to give a percentage discount, enter your percentage figure.
7. Touch Order.

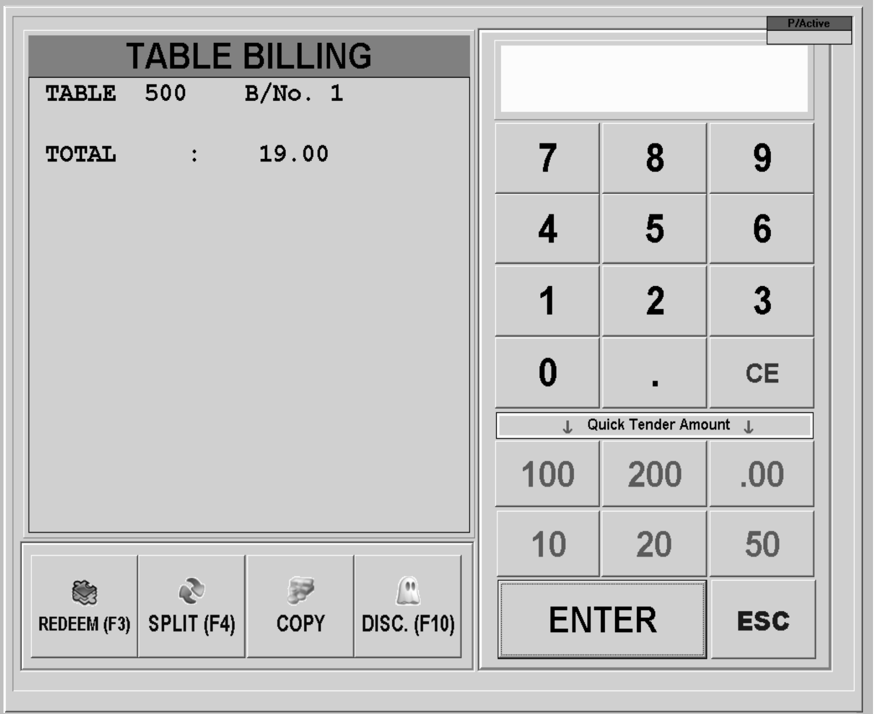
   If the waitron has already ordered the item, you will first need to void the item from the bill and then complete the above steps.

Discounting a Bill

1. Bill the table you want to discount.
2. At the tender stage, touch the Disc button.



3. Enter your management pin, swipe your manager card or use the Finger Print ID terminal.
4. If you want to give a value discount, touch Minus and enter the value amount. Please note that you cannot give a value discount for more than the total of the bill.
5. If you want to give a percentage discount, enter your percentage figure.
6. Touch Copy.
7. This prints a tax invoice for the customer.



Note For tax reasons you cannot give a discount on a pro-forma invoice. It is therefore necessary to issue the bill after giving the discount. This completes the bill as a tax invoice. You need to be sure that all items on the bill are correct before proceeding with giving a discount.

Extra Notes

Editing or Voiding Items from a Bill

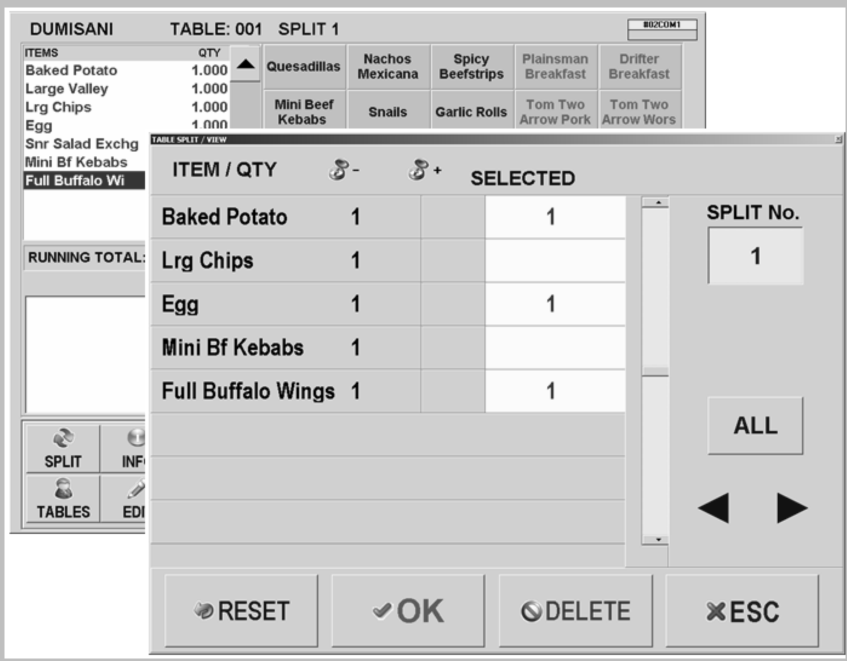
The voiding function allows you to change or delete items on a bill. Editing items on bills needs to take place before you have placed an order to any order printers, or before you have printed any pro-forma invoices. If an item has already been ordered or invoiced, you will then need to void the items from the bill.

Note All items deleted from a bill are logged in an audit log.

Editing Items on a Bill

This function is only available for use if items have been added to a bill, but those items have not yet been forwarded to any order printers. Also, if a pro-forma invoice has been printed you cannot edit items, you will need to void the items. A management authorisation is required to complete the editing and voiding of items on bills.

Use the following procedure as a guide to editing bills:



1. Open the table with the items you want to edit (items that have not been ordered).
2. The items that appear in red in the items listing box are available for editing. The items in green cannot be edited.
3. Touch Edit.
4. The system displays the items and the quantities that you can remove without management authorization.
5. Select the item you want to delete by touching the Selected column next to the item you want to remove. If you want to remove more than 1 of the item touch the selected column again.
6. To un-select an item, touch the item description.
7. Once all the items you want to remove have been selected, touch Delete.
8. You will see that the items you have selected to remove will disappear.
9. When you are finished editing the bill, touch OK to return to the table you were busy with.

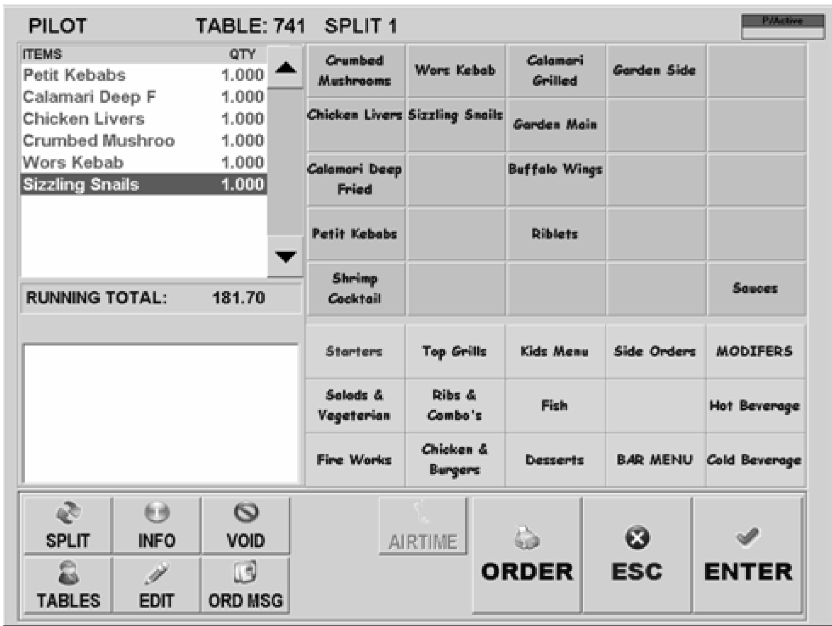
Extra Notes

Voiding Items on a Bill

This function must be used if items on a bill have been sent to an order printer, or if a pro-forma invoice has already been printed. Management authorisation is required to complete the voiding of items on a bill.

Use the following procedure as a guideline to voiding items:

1. Open the table with the items you want to void (items that have been ordered).
2. The items that appear in green in the items listing box need to be voided. The items in red can still be edited from the bill.
3. Click on the Void button.
4. Select the item that you want to void (Top left in Green).
5. Enter your management pin or swipe your manager's card.
6. Select the reason for the Void.
7. The item that you have selected will now appear at the top left in RED with a minus sign next to it.
8. Select the exit button / order button to complete the item void.
9. A void slip will now print out which the manager must sign and attach to the Discount log at the end of the day.
10. When you access the table again the item voided will appear in purple.



These voided items are also returned to stock. If you want to remove this voided item from stock, then you need to ring up another one of the item and discount it by 100%, i.e. you decrease stock, but there is no charge to the customer.

Warning – Fraud and Theft!

Follow the business procedures related to authorising the voiding of bills very closely. If you notice staff members trying to avoid authorisation rules, ask questions and monitor their behaviour.

- Voids must always be authorised by a manager and not just voided directly. This allows the voiding process to have two witnesses.
- Insist that void slips be signed by a manager and the waitron.
- Include void slips as part of the cash up routine and compare them against bill printouts.
- Ensure that void slips are collected after verification and include them in the Void / Return Report at the end of each day

Viewing and Closing Bills

The Pilot POS system allows supervisors and managers to access and view table information in order to allow for enhanced service and management of the business.

Accessing Tables

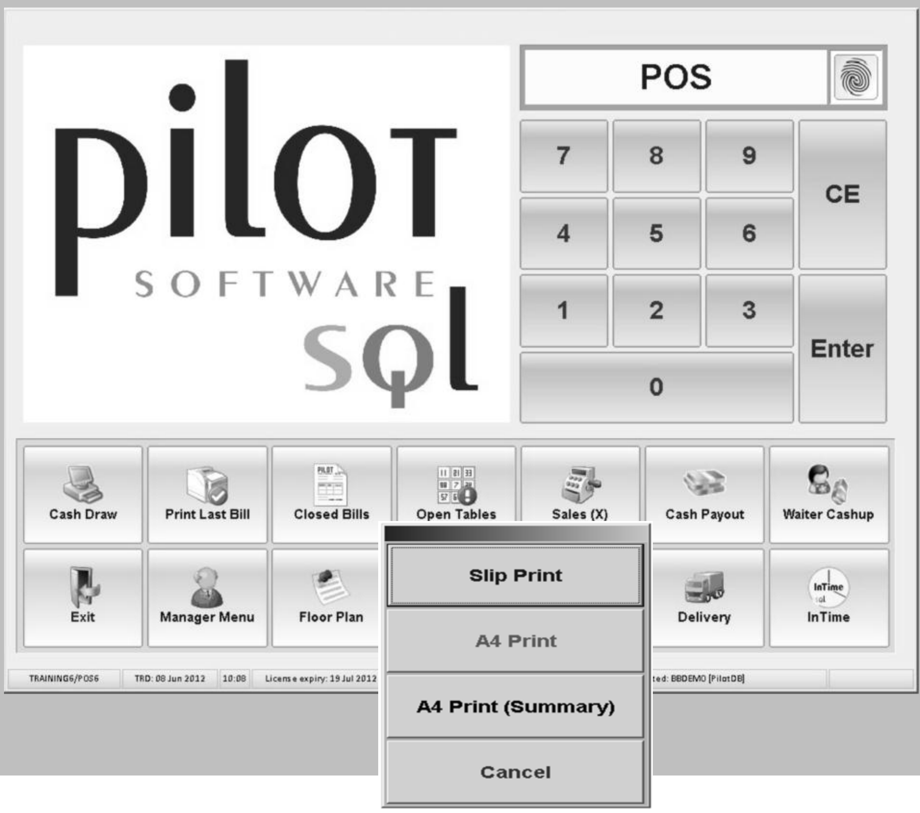
1. Swipe the supervisor's access card or use the Finger Print ID terminal.
2. Enter the table number using the keypad.
3. The information of the selected table will be displayed.

Note If the system prompts for customers and a table number, then that table does not exist on the system. You have started the process to begin a new table.

Reprinting Bills for Closed Tables

You can re-print any tax invoice with the Touch POS system. The system keeps all the billing information for the current day, and only clears this information with the completion of the Day Close routine.

1. Select the Closed Bills button in the Pilot POS screen.
2. Select the Print option once you have found the bill you would like to print.
3. The Print screen will appear.
4. Select the Slip Print option.
5. The bill will now print.



Extra Notes