Module 6 – Managing Pilot POS Software and Hardware

Overview

The Pilot POS system is made up of a number of software and hardware components and it is important that you know and understand how to perform some basic maintenance tasks so that the system continues to operate efficiently and effectively.

The learning objectives for this module:

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

- Recognise where to find the procedures and instructions for setting up a POS station
- Recognise where to find the procedures and instructions for setting up and redirecting a POS station printer
- Recognise where to find the procedures and instructions for setting up the printing of bills, orders and POS reports
- Practice the procedures and routines to plan and set up where reports should be printed
- Apply effective procedures for making backups.

Setting Up a Point-of-Sale Workstation

The Pilot POS Setup functionality is used to determine exactly how your POS station is going to behave. It has a number of settings which affect the machine that you are actually working on, and also a number of settings which affect all the stations. The set up of the stations is usually done by a Pilot Software employee, but you may need to go into here from time to time to change settings.

Caution - **Maintaining the integrity of your system**

When making changes in the Pilot POS Setup functionality, work as carefully as possible. Changes and updates here affect the way in which your system functions.
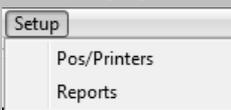
Setting Up POS Stations

Use the following information as a guideline to setting up Pilot POS workstations:

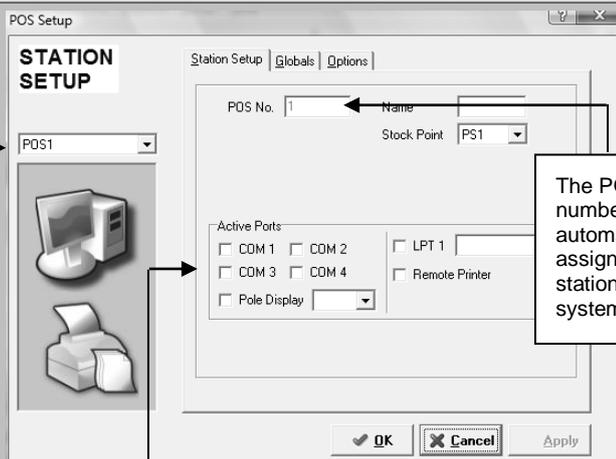1. Open the Touch POS program and click on the Manager Menu button:

    Manager Menu

2. Access the functionality to set up printers via the Setup… Pos / Printers menu option. The POS Setup window will be displayed:

    Setup
    Pos/Printers
    Reports

Pilot Software uses the following naming conventions:

*   FS1 - File server
*   WS1 - Workstation 1
*   WS2 - Workstation 2, and so on.

Use the drop-down list to select the POS station you want to work with.

The POS number is automatically assigned to the station by the system.

The Active Ports frame is used to determine what physical COM ports you have on your system. It is also used to determine whether you are using a pole display or not. If you are running order printers from a particular station, you would select the remote printer here.

Using the COM Port Setup tab to set up printers

3. This tab is used to set up your COM port settings, which in turn affects the printers which are attached to them.
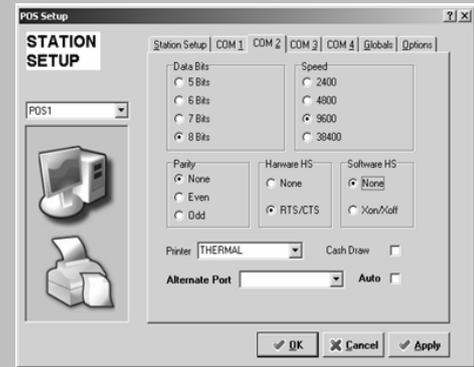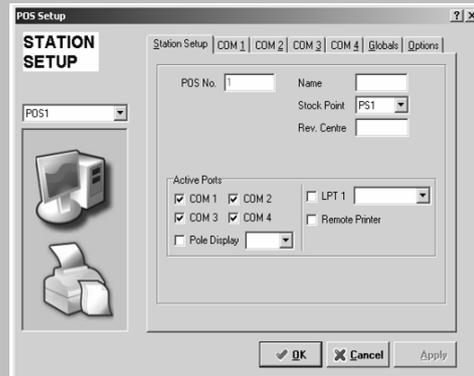
    You will see a separate page for each COM port that you activated on the Station Setup tab. The following settings should stay as follows:

    - Data Bits = 8
    - Speed = 9600
    - Parity = None
    - Hardware HS = RTS/CTS
    - Software HS = None
      You can adjust the following to suit your needs:
    - Printer = Select the type of printer that is attached to your COM port by clicking the drop down arrow. Select either "Thermal" or "Dot Matrix" (these are standard for Pilot).
    - Cash Draw = If you have a cash draw that is activated by this printer, then check this box. You will need to setup a cash draw initialization file under the Options section.

    - Alternate Port = The system allows for "smart" printing. If this printer should happen to fail for any reason, select an alternate print destination for the print jobs. The system will then print all jobs for this printer to the alternate printer.
    - Auto = Select this checkbox if you are using the "smart" printer option. This setting will switch the print destinations automatically in the case of a printer breakdown.

Think and Do!

Using the Globals Setup tab to confirm bill information

The settings on this tab affect all the stations. If you change the settings on one station, all the other stations will be updated automatically.

4. Use this tab to confirm the information that you want printed on your bills, for example:

5. Caption = This field is printed at the top of the bill and is usually used to say TAX INVOICE.

6. VAT numbers and telephone numbers.

7. MSG = Use these five fields for typing messages to your clients. These messages print at the bottom of your bill.

Using the Options tab to define information for specific POS stations

The information on this tab affects the specific station that you are working on. It changes the way in which the terminal behaves and what questions the station asks staff members when capturing bills. The following settings can be changed:

- Waiter PIN
- Waiter Auto Logoff
- Waiter Tips
- Auto-Print Invoice
- Payment Type
- Bill Covers Reqd
- MaxiClub Allowed
- Pro-Forma Invoices
- Bill Print (Table Close)
- Bill Payment (Bill Close)
- Bill Edit Allowed
- Touch Popups
- Keyboard Mode
- Keyboard Popups
- Other Loyalty Allowed
- Quick Table Number
- T/a Wtr
- Del Wtr
- Screen File
- Default Screen
- Cash Draw.

STATION SETUP

Station Setup | COM 2 | Globals | Options

POS1

- [ ] Waiter PIN
- [x] Waiter Auto Logoff
- [x] Waiter Tips
- [x] Auto-Print Invoice
- [x] Auto Print Orders
- [x] Payment Type
- [x] Bill Covers Reqd.
- [x] Pro-Forma Invoices
- [x] Bill Print (Table Close)
- [x] Bill Payment (Bill Close)
- [x] Bill Edit Allowed
- [x] Touch Popups
- [ ] Keyboard Mode
- [ ] KeyBoard Popups

QuickTable Active [ ]   T/A Wtr [____]

Quick Table No. [___]

Default Screen [STARTERS & BREAKFAST SPUR ▼]

✔ OK   ✗ Cancel   Apply

Think and Do!

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STATION SETUP

Station Setup | COM 2 | Globals | Options

POS1

☐ Waiter PIN
☑ Waiter Auto Logoff
☑ Waiter Tips
☑ Auto-Print Invoice
☑ Auto Print Orders
☑ Payment Type
☑ Bill Covers Reqd.

☑ Pro-Forma Invoices
☑ Bill Print (Table Close)
☑ Bill Payment (Bill Close)
☑ Bill Edit Allowed
☑ Touch Popups
☐ Keyboard Mode
☐ KeyBoard Popups

QuickTable Active ☐   T/A Wtr [   ]
Quick Table No.   [▓]
Default Screen [STARTERS & BREAKFAST SPUR   ▼]

✔ OK   ✘ Cancel   Apply

Working with the Options tab

Use the following information to generate a better understanding of working with the Options tab:

- **Waiter Pin** Determines whether the station must prompt for a waiter pin number and is useful for security when you are running a "pouch system" with waiters ringing through their own orders to kitchen printers. This function is usually associated with the waiter pin numbers and finger reader. If not ticked waiters will have access to all tables and will only be able to use a waiter number.

- **Waiter Auto Logoff** This is used to auto logoff a waiter that has forgotten to escape from the table or press order, thus preventing other staff members from ringing up items on that table.

- **Waiter Tips** When this option is selected it will prompt the waiter to enter a tip amount when closing off a bill. This will then show up on their cash up. However it will not show up if they do not enter it.

- **Auto Print Invoice** Determines whether the station automatically prints a tax invoice when the bill is closed off.

- **Auto Print Orders** Determines whether the station automatically prints orders to the kitchen or bar order printers. If this setting is on, and a waitron exits from the table after placing new orders, then the system will prompt to print orders.

- **Payment Type** Determines whether the station prompts the waiter for the payment type when closing off a bill.

- **Pro-Forma Invoices** Determines whether the station will allow pro-forma invoicing to take place. If you have no bill printer at the station, then this setting must not be activated. If you want to run a cash-desk control system, then the only station with this function activated must be the cash-desk station.

- **Bill Print** Determines whether this station will be allowed to close off bills. You may want to allow printing of pro-formas but then only allow closing to take place at a specific station. You would then allow this setting at the close off station.

- **Bill Payment** Determines whether this station will be allowed to close off tables. Can print bills in delivery mode.

- **Bill Covers Reqd** Determines whether the station must prompt the waitron for number of customers for each new table that is opened up. If this setting is on, the system will not allow a waitron to close off a bill until they enter the number of covers.

- **Keyboard Mode** This switch will only be active if you are running a keyboard version of the software.

- **Keyboard Popups** This setting determines whether the system will show prep options for items or not if you are using keyboards to place orders and not touch screens.

- **Quick Table Number** This setting allows you to assign a quick table number to each station. When this table number is used, it skips asking for customer numbers at the opening of the bill. When a transaction on that table is closed off, the system automatically re-opens the table. This setting is used in bar environments where you do not have table numbers and do not need to know customer numbers. This table only needs to be opened once in the day and will remain open for the rest of the day.

- **T/A Wtr** This is where you input which waitron number must be used as a take away number. If you want to use the station as a take away till, then you must capture the waitron number here. Every time this waitron number rings off a bill, the system will allocate a take away reference number to the bill.

- **Del Wtr** This is where you enter which waitron number must be used as a delivery number. If you want to use the station as a delivery station, then you must capture the waitron number here. Every time this waitron number is used at this terminal, it will prompt for client details and also include delivery reference numbers on the bill.

- **Screen File** This setting in Pilot is used to set the screen on all the point of sale terminals. It is important that this setting is kept standard through out all the terminals.

- **Default Screen** This setting allows you to choose which page the station opens first in a specific screen layout file. This is used when you have configured all the terminals to use the same screen layout file, but you want each terminal to start on a different page. This is useful in a restaurant/bar, where you would have to bar stations logging onto the drinks page, and all the restaurant stations logging onto the food page.

- **Cash Draw** This setting allows you to configure a cash draw initialisation file for 'kicking' open the cash draw. This is used in conjunction with the cash draw setting under the COM port setup section.

Setting Up Printing Destinations

The Reports setup function allows you to change where each print destination prints to. It is here that you change the physical destinations of your printers.
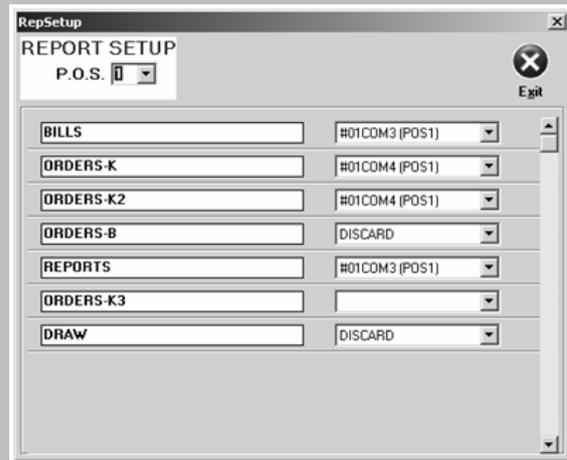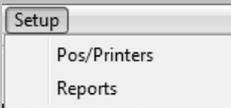
Setting Up Printing Destinations

Use the following information as a guideline to set up printing destinations:

1. Open the Touch POS program and click on the Manager Menu button:

   Manager Menu

2. Access the functionality to set up printers via the Setup… Reports menu option. The Report Setup window will be displayed:

   Setup
   Pos/Printers
   Reports

   RepSetup
   REPORT SETUP
   P.O.S. 0
   Exit

BILLS	#01COM3 (POS1)
ORDERS-K	#01COM4 (POS1)
ORDERS-K2	#01COM4 (POS1)
ORDERS-B	DISCARD
REPORTS	#01COM3 (POS1)
ORDERS-K3	
DRAW	DISCARD

3. The Report Setup window will display group destinations. Select a print destination by clicking on the drop-down arrow:
   - **BILLS** Where your bills will print to.
   - **ORDERS-K** Where your Kitchen 1 orders will print to.
   - **ORDERS-K2** Where your Kitchen 2 orders will print to.
   - **ORDERS-B** Where your Bar orders will print to.
   - **REPORTS** Where your reports from the touch system will print to.
4. When a new station is added, the com ports are made active and the remote printer is switched on, that station's printers are made available to the whole system. You will see them in the following format:

   #xCOMy (z)

   Where x = station number, y = com port number & z = station name.
   A typical line would be: #01COM1 (FS1)

Extra Notes

The Importance of Making Backups

Accessing and initiating your backup routines will be a process that you will need to practice and be disciplined about. Ensure that you know how to make a backup and how to test it. It is vital to acknowledge that the safe storage of your electronic data is your responsibility, and if the database of your business is made up of substantial stock and menu items and supplier accounts we cannot emphasise enough how important it is to make backups on a regular basis.

We strongly recommend that you consider the following routines to ensure that your business is adequately covered in the event of hard drive failure or other unforeseen circumstances such as theft, lightning strikes, viruses and so on.

- A weekly backup made onto a device that is detached from your day to day working computer, for example an external hard drive or a CD.
- A backup at the end of each week that is made up of a collection of each working day that was previously backed up.
- Test the stability and validity of your backups on a bi-weekly or monthly basis.
- A monthly backup which you can keep for a financial year.

If you fail to do a successful back-up while running day end you then need to contact the Pilot Software Call Centre for some help. However, Pilot Software does have an off-site back up for all clients called Iron Tree which will automatically back up to the destination file. Discuss this option with Pilot Software Support Staff.

Backup Routines

The Backup application is separate to the Admin and POS programs.

Use the suggested information from the facilitator as a guideline to make backups.

Performing Basic Maintenance on your Equipment and Network

It is not difficult to ensure that your equipment remains in an operational and trustworthy state. This section gives your some simple housekeeping tasks that you can follow to help you reduce unnecessary problems. They are simple tasks that can ensure that you avoid most POS problems, ensures lower hardware maintenance, and ultimately means you are providing customer satisfaction and being a responsible employee.

Extra Notes

PC Maintenance

Wipe the outside surfaces of the computer, monitor, keyboard and mouse with a dry cloth at least once a week. Every day would be better.

You could also use computer cleaning spray.

When cleaning the keyboard, make sure the computer is switched off. Hold the keyboard upside down and shake gently to release any small particles or dust that could have settled between the keyboard keys.

Extra Notes

Bill Printer Maintenance

Wipe the outside surface of the printer with a cloth (not soaking wet) at least once every day.

Unplug the printer, turn it upside down and shake gently to release any small particles or dust that could have settled inside the printer.

Gently blow into the opening where the paper is fed through.

Always make sure that the printer has sufficient paper to feed through freely.

The paper has a red line almost at the end of roll to warn operators that the roll has to be replaced. Take note of this warning.

Uninterruptible Power Supply (UPS) Maintenance

Extra Notes

Wipe the outside surface of the UPS with a cloth at least once a week.

ADSL Modem Maintenance

Extra Notes

Dust the outside surface of the modem with a feather duster or clean, dry cloth at least once a day.

Make sure that the modem is kept away from other power sources, for example cell phones.

Check regularly that power is being supplied to the modem.

Always ensure that the modem aerial is in a vertical position (Upwards or Downwards). No signal will be received if the aerial is in a diagonal position.