WELCOME TO THE LATEST VERSION OF DIGITAL DINING!

This manual contains instructions and helpful hints to get you through the early days of your Digital Dining experience. Most of the documents enclosed are duplicates of the detailed instructions you will find in the Manager's Guide (which is also enclosed). We strongly suggest that you file the Manager's Guide & make copies of the other documents to be posted at the different terminals where appropriate; this way you will always have a copy of these instructions ready at your finger tips. These are by no means a complete guide to everything you need to know about Digital Dining. For further information and assistance, refer to your Digital Dining Manual supplied by Menusoft, or call us at (603)431-3227 between the hours of 9am and 5pm.

We hope these instructions will help to make your Digital Dining experience an enjoyable one.

HDS New England

HOW TO REACH US

Our mailing & shipping address is:

HDS - New England

235 West Road, Suite 10

Portsmouth, NH 03801

Our phone numbers are:

NH: (603)431-3227 ***Fax: (603)431-3262***

E-Mail: HDSNE@HDSNE.COM

Voice Mail Options

- **ALL Emergencies - ext. 3**
(Mon - Sun, 24 Hours)
- **Software Support - ext. 5**
(Mon - Fri, 9am - 5pm)
- **Hardware Support - ext. 4**
(Mon - Fri, 9am - 5pm)
- **Sales - ext. 1**
(Mon - Fri, 9am - 5pm)
- **Accounting - ext. 6**
(Mon - Fri, 9am - 5pm)
- **For Paper & Ribbon Supply Information - ext. 8**
(Mon - Sun, 24 Hours)

Our voice mail extensions are:

110 - Mike Wolf
116 - Paul Hefron
125 - Michelle Jordan

114 - Mike Jordan
119 - Matt Smith
120 - Rob Miller
121 - Ron Freedman
123 - Denys Arsenault
124 - Ed Quinn

111 - Sue Tremblay
122 - Audra Lurvey
112 - Seth Moore
117 - Sean Felder
118 - Dave Dickinson

END OF DAY PROCEDURE

For Windows

<u>IN DIGITAL DINING BACK OFFICE:</u>

<u>Step 1.</u> Check for any open tables/tabs
Log On
Click on **Utilities**
Highlight **Process Utilities**, then click on it
Enter the date you are checking, click on **Okay**, then confirm
If there are any open checks, they will be displayed on the right half of the screen.
If there are open tables, pay out the checks accordingly
When there are no checks open, **Exit POS**

<u>Step 2.</u> *If you do not use credit card authorization through Digital Dining, skip to step 4.* If you do use credit card authorization, you MUST do this step before you go any further. **This step should be done either during a slow period or when the restaurant is closed, since this will tie up the modem for a few minutes. No new charges can be authorized while the old charges are being posted!**

Click on **Register Reports**
Choose **Receipt Reports**
Choose **Credit Card Report**
Print the credit card report, then confirm all credit card transactions

Click on **Utilities**
Choose **Process Credit Cards**
Enter the date you are batching out, then click on **Okay**
Click on **Yes** to really batch out this day
On your screen, you will see the credit card transactions process on your screen.
When the cards have batched out, you will see the **Credit Card Batch Summary** report on the screen;
You want to print this!

<u>Step 3.</u> Print your End Of Day Reports
Go back into **Utilities**
Choose **Process & Report**
Confirm the date, then say **Yes** to continue

<u>Step 4.</u> Edit your Time & Attendance
Click on **Staff**
Highlight **Time & Attendance**
Choose **Time & Attendance Transactions**
Enter in the correct date
From the **Time & Attendance Report** *that printed with your End of Day reports*, go through the report & pick out any transactions that need to be corrected
Scroll through the list of employees clocked in for that day and change the necessary information. Type in a reason in the bottom box, then click on **Save**. Repeat for all others who need corrections.

END OF PAY PERIOD PROCEDURES
For Windows

IN DIGITAL DINING BACK OFFICE:

Staff Reporting & Resets

Click on **Staff**
Highlight **Staff Reports**
Highlight **Staff Tips** & click on it
Sort by Last Name (the box on the upper left)
Group by Department (the box to the right)

Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

Click on **Staff**
Highlight **Time & Attendance**
Highlight **T & A Reports** & click on it
Select the **Weekly Time Cards** Report
Select the date range (the beginning date of the pay period
to the ending date of the pay period)
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit

Select the **Consolidated T & A** Report
Select the date range (the beginning date of the pay period
to the ending date of the pay period)
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

Click on **Staff**
Highlight **Staff Utilities**
Highlight **Staff PTD Reset** & click on it
Click on **OK 2** times to reset the PTD receipts & sales figures

END OF MONTH PROCEDURES

For Windows

<u>IN DIGITAL DINING BACK OFFICE:</u>

<u>Step 1.</u> *Print Receipts & Sales Reports*
Log On
Click on **Register Reports**
Highlight **Receipts Reports** & click on it
Click on the ? to get your list of reports & choose **Profit Center Report**
Enter in the date range for the month
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

Click on **Register Reports**
Highlight **Sales Reports** & click on it
Click on the ? to get your list of reports & choose **Sales By Type**
Enter in the date range for the month
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

Click on **Register Reports**
Highlight **Discount Reports** & click on it
Click on the ? to get your list of reports & choose **Discount Summary**
Enter in the date range for the month
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

<u>Step 2.</u> *Print Staff Sales & Tip Information*

Click on **Staff**
Highlight **Staff Reports** Highlight **Staff Tips** & click on it
Sort by Last Name (the box on the upper left)
Group by Department (the box to the right)
Turn off Primary Dept Only (just under the sorting options – click on the little box with the "x" to make the x go away)

Choose **Period To Date** for the range
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

END OF MONTH PROCEDURES cont.

<u>Step 3.</u> *Print Accounts Receivable Statements*

Click on **A/R**
Highlight **A/R Account Transactions**
Highlight **Post Batch** & click on it
Choose **Single Use**, then **Post** to confirm
(this ensures that any back office entries made to the accounts will show up on the statements)

Click on **A/R**
Highlight **A/R Account Reports**
Highlight **A/R Detailed Transaction Report** & click on it
Click on the tabs across the top & make sure to include everything
Back on the **Sort Order** tab, choose **Sort by Name** ***
Choose **Group by: None**
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

*** Please note that when you choose to sort by account number, you must enter the account range (1 to 99999), otherwise the report is blank.

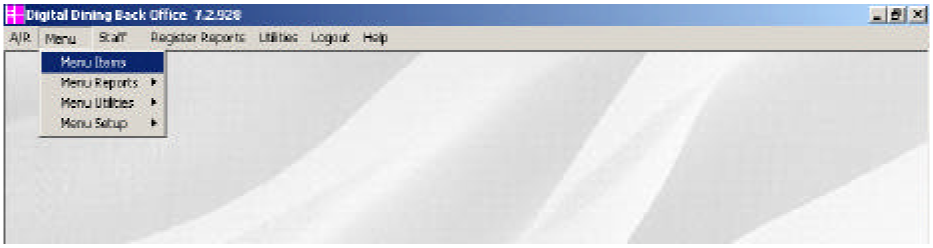
Click on **A/R**
Highlight **A/R Account Statements**
Click on the tabs across the top & make sure to include everything
Back on the **Sort Order** tab, choose **Sort by Name**
Choose **Group by: None**
Choose **Print** (If you just want to **Preview**, you must enter the account number)
Click on **Print** (the button on the bottom)
Click on the Printer icon (7) at the top of the screen
Click on the "**X**" in the upper right corner to exit
Click on **Exit**

Click on **A/R**
Highlight **A/R Account Utilities**
Highlight **A/R Aging** & click on it
Click on **Yes** to confirm that you really want to age the accounts
(this takes all A/R detail & lumps it into your beginning balance for next month)

ADDING MENU ITEMS

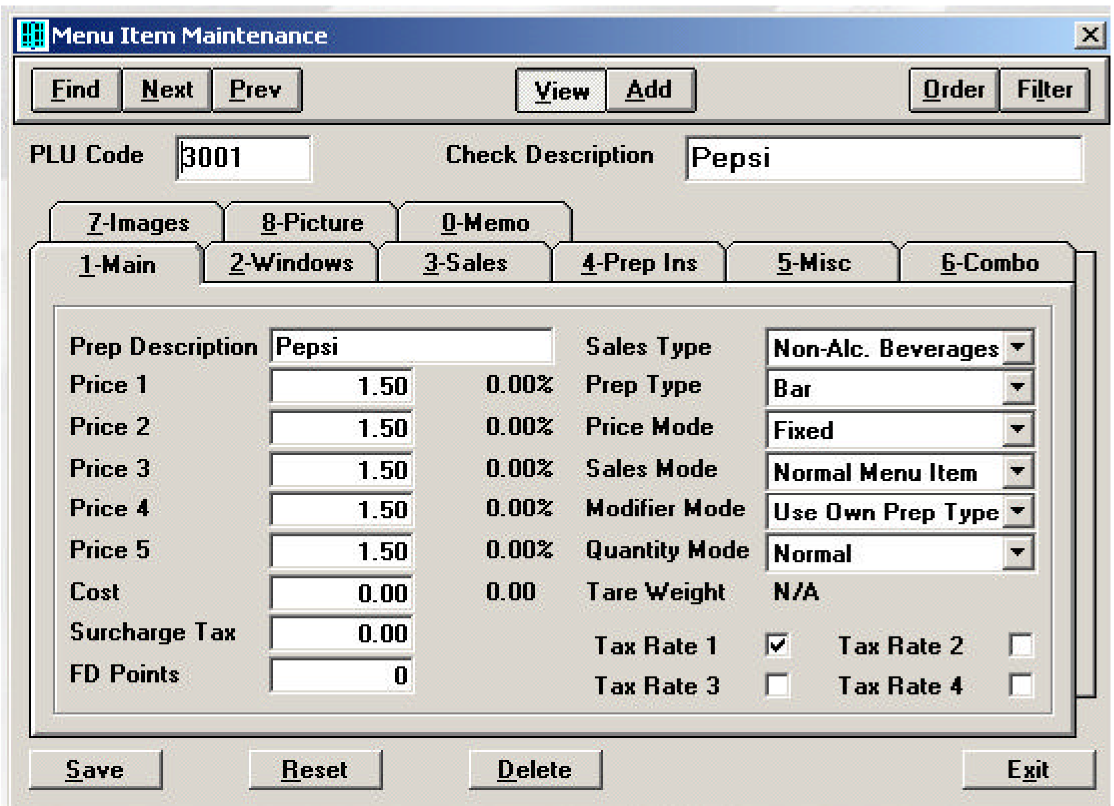
For Windows

<u>IN DIGITAL DINING BACK OFFICE:</u>



Click on Menu
Highlight Menu Items and click on it

<u>On the **Main** tab:</u>



(Menu items comes up by default in view mode. To make things a little easier: Before adding a new item, stay in view mode and click on find and select an item that is similar to the item you want to add. Now many fields are already set the way they need to be.)

Click on **Add**
(Digital Dining will automatically go to the next available menu item code, placing the cursor in the check description field)
Type in the **check description**, then hit the **TAB** key twice
(This is how the item will appear on the ordering screen & on the guest check)
Type in the **prep description** if you would like it to be different than the check description, then hit **TAB**
(This is how the item will appear in the kitchen or bar)
Enter the **prices** for the item *(You MUST enter ALL 5 prices, even if they are all the same)*
Select the **Sales Type** by clicking on the ▼ to the right of the rectangle & then scanning the list by clicking on the ▼ & ▲ to the right
Select the **Prep Type** by clicking on the ▼ to the right of the rectangle & then scanning the list by clicking on the ▼ & ▲ to the right

ADDING MENU ITEMS cont.

Select the **Price Mode** by clicking on the ? to the right of the rectangle & then scanning the list by clicking on the ? & ~ to the right

Fixed = Whatever price you enter in Prices 1 – 5 is the price charged for the item

Open = The POS will stop & ask for the price on this item (the price can be positive or negative)

Open Positive = The POS will stop & ask for the price on this item (the price will prompt as $0.00 & can be positive only)

Open Negative = The POS will stop & ask for the price on this item (the price will prompt as $0.00 & can be negative only)

Open 999.99 = The POS will stop & ask for the price on this item (the price will prompt as $999.99 & can be positive or negative)

Select the **Sales Mode** by clicking on the ? to the right of the rectangle to get your options

Normal = A regular menu item

Modifier = A modifier

No Sale = An on screen description (it can not be ordered)

Link Only = An item that only serves as a link to another window

Select **Modifier Mode** by clicking on the ? to the right of the rectangle to get your options

Inherit Prep Type = For modifiers that are following the menu item to the prep printer

Use Own Prep Type = For menu items or for modifiers that are not following the menu item, but are going to their own prep *printer (for example, if you have a Fried prep station & a Broiled prep station, you would want the Baked Haddock to go to the Broiled station and the Fries to go to the Fried station)*

Select **Quantity Mode** by clicking on the ? to the right of the rectangle to get your options

Normal = The item will not prompt for a quantity

Always = The item will always prompt for a quantity *(useful for items like Oysters On The Half Shell where you order by the piece)*

Decimal = The item will allow for a quantity with a decimal *(for items purchased by the pound)*

Scale = For scale interfaces

Click on the appropriate **tax rate**, making sure that only 1 rate is checked

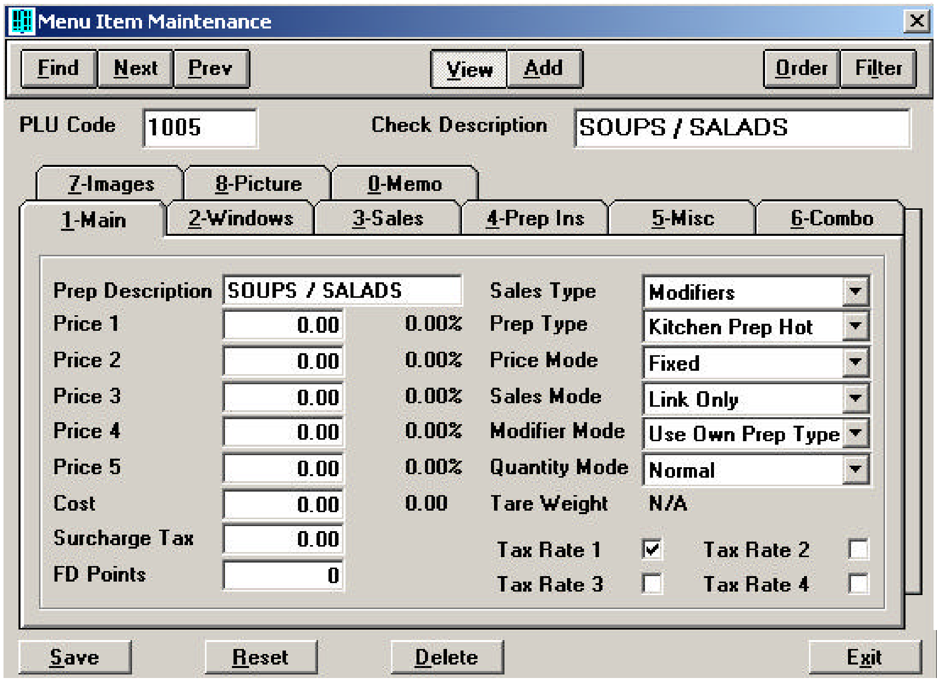
1 = Meals Tax

2 = Beverage Tax

3 = Retail Tax

ADDING MENU ITEMS cont.

On the **Windows** tab:



Select the POS Window by clicking on the Insert button on the left & then typing in the first few letters of the POS Window, highlighting it & clicking on ***OK*** *(If you are not sure of the name of the window, you can scan the list by clicking on the ▼ & ▲ to the right).* Repeat for all of the POS windows you would like this item to appear in.

If this item needs to loop to a modifier or a series of modifiers, click on the Insert button on the right (under the Modifier column) & then type in the first few letters of the Modifier Window, highlight it & click on ***OK*** *(If you are not sure of the name of the window, you can scan the list by clicking on the ▼ & ▲ to the right)* If this item does not need any modifiers, make sure the Modifier Windows box is empty. Repeat for all necessary modifier options.

Example: The Sirloin Steak needs a temp, a starch, then a dressing choice:

Meat Temps

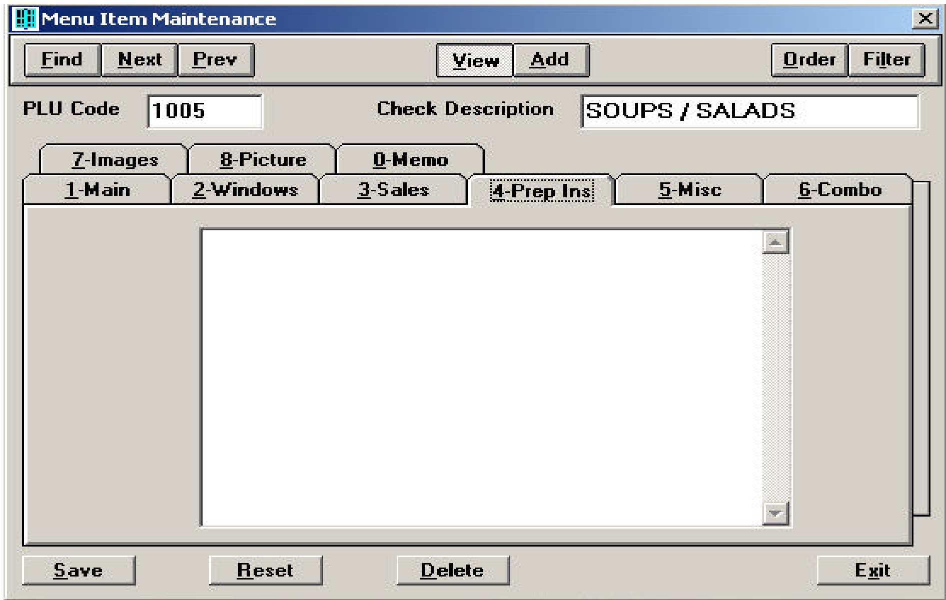
Starches

Dressing

When a menu item needs more than one modifier option, you can add the modifier windows in any order, then sort them by clicking on the modifier window with the left mouse button & dragging and dropping the modifier windows in the order you want them to print on the prep slip.

ADDING MENU ITEMS cont.

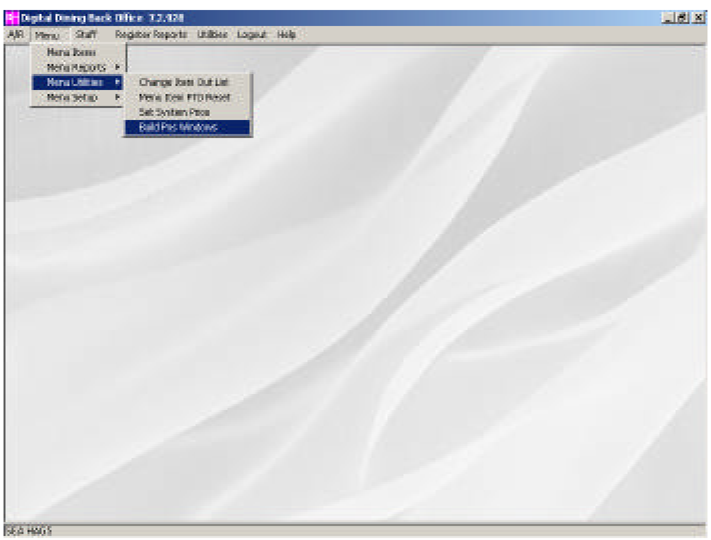
<u>On the **Prep Instruction** tab (This is optional):</u>



Click on the white text block to get the cursor there, then type in how to prepare the item *(like drinks at the bar)* or just a general list of ingredients *(for food items so that the server can see if there is an ingredient that a customer is allergic to)*

Click back on the **Main** tab, then on **Save**
Repeat for any other items to be added or **Exit** to get out

** Once all new items have been added, you must do the following:

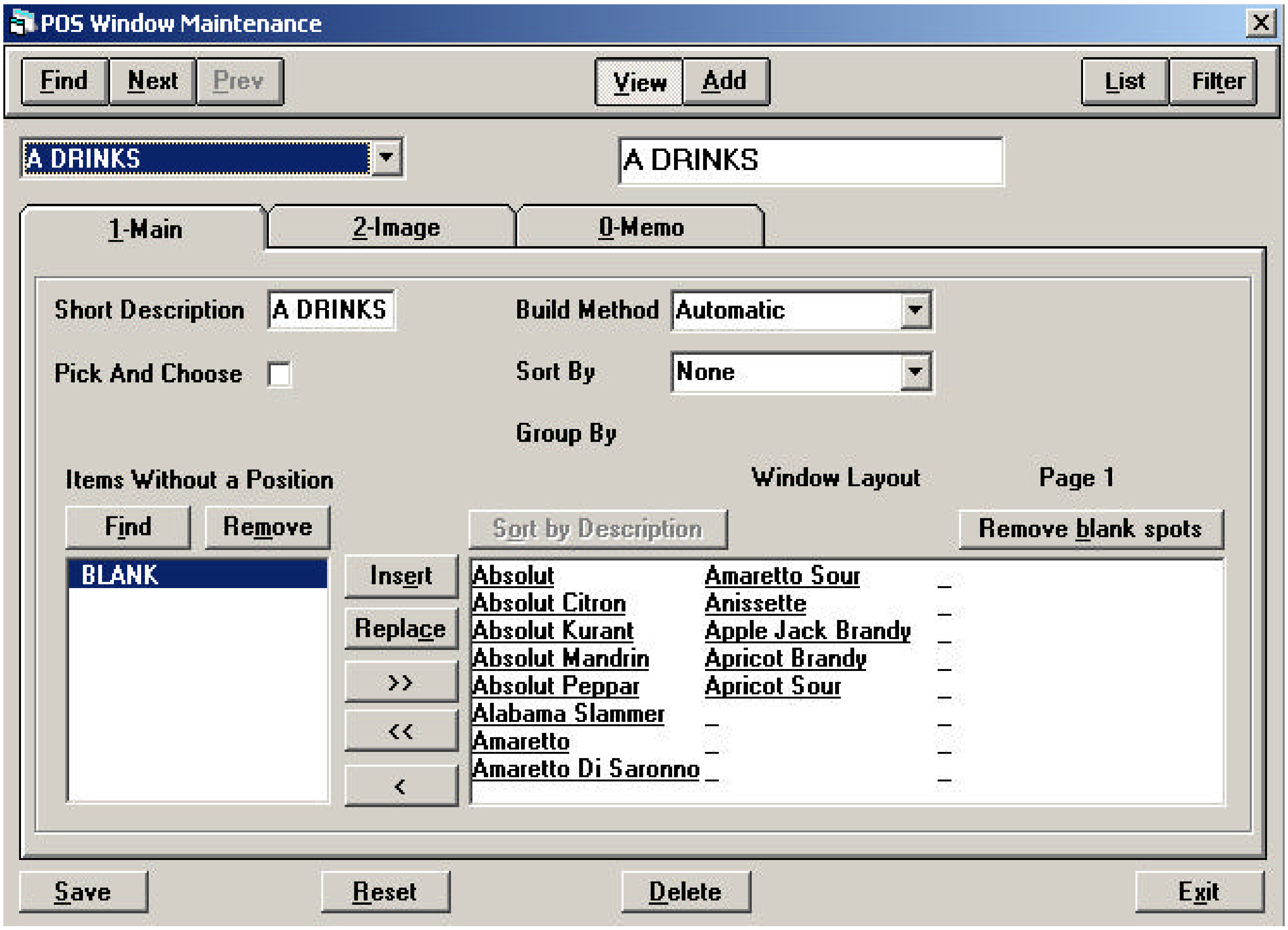


Click on **Menu**
Highlight **Menu Utilities**
Highlight **Build POS Windows** & click on it

ADDING MENU ITEMS cont.

Now we want to arrange how the items in that category appear in the point of sale.

Click on **MENU**
Then Highlight **MENU SETUP**
Then Click on **MENU POS WINDOWS**

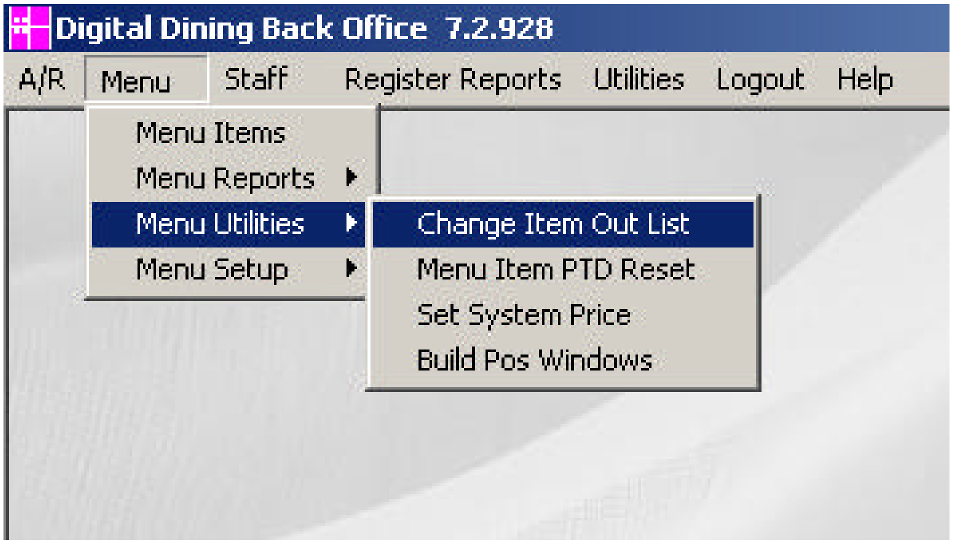


Find the window you just added to & make sure the item(s) are there
(Find the window by clicking on the ▼ to the right of the rectangle & then scanning the list by clicking on the ▼ & ▲ to the right)

Sort the items in the window by dragging & dropping until the window looks the way you want
Click on **Save**
Repeat for all windows
Click on **Build Windows** & watch them build
Click on **Exit**

EDITING THE ITEM OUT LIST

Adding Items to the Item Out List:
IN DIGITAL DINING BACK OFFICE:



Click on **Menu**
Highlight **Menu Utilities**
Highlight **Change Item Out List**
& click on it

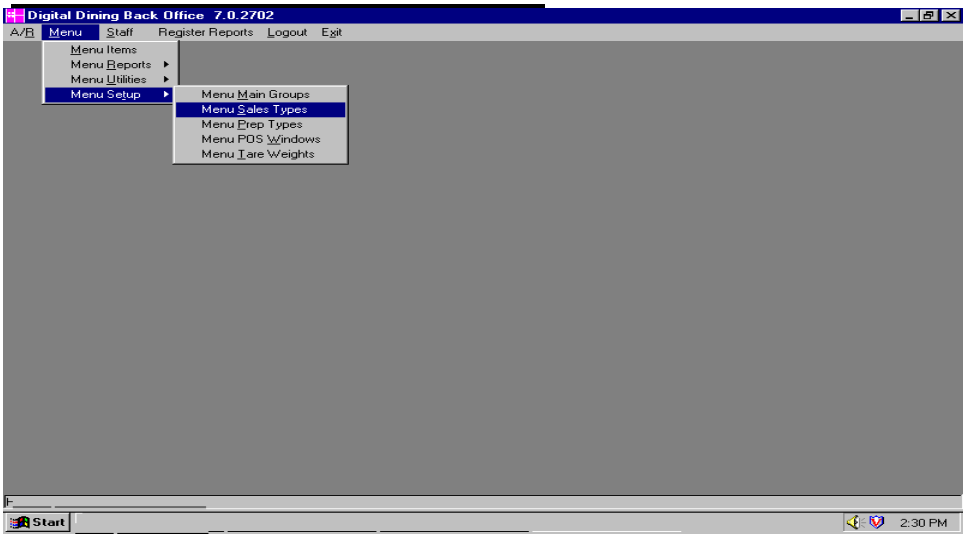
Click on the ¨ next to **Item** & type in the 1st few letters of the item you are looking for
Highlight the item, click on it, then click on **OK**
Click in the white box next to **Count** & type in how many of this item are left
Click on **Save**
Repeat for all items to be added to the Item Out List
Click on **Exit** when you are through

Removing Items from the Item Out List:

Click on **Menu**
Highlight **Menu Utilities**
Highlight **Change Item Out List** & click on it
Highlight the item to be removed from the item out list & double click on it
(the item will disappear from the list)
Repeat for all items to be removed from the Item Out List
Click on **Exit** when you are through

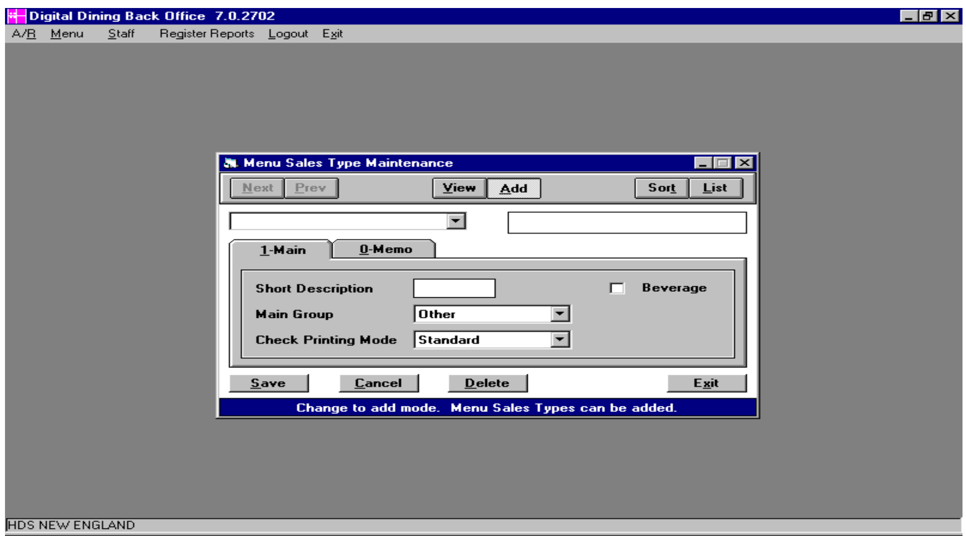
ADDING SALES TYPES

IN DIGITAL DINING BACK OFFICE:



Click on Menu
Highlight **Menu Setup**

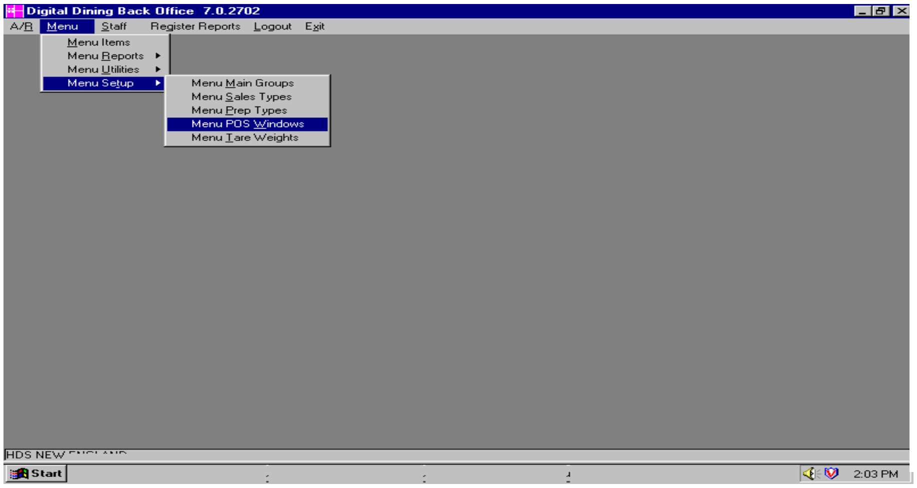
Highlight **Menu Sales Types** & click on it



Click on **Add**
Type in the description, then hit the **Tab** key
Click on the ? next to **Main Group** & choose the appropriate main group
Click on the ? next to **Check Print Mode** & choose **Standard** *(this means that if it has a price the item will print on the guest check; if it does not have a price, the item will not print on the guest check)*
Click on **Save**
Repeat for all new sales types
Click on **Exit** when finished

ADDING POS WINDOWS

Step 1. *Creating the POS Window*
In Digital Dining Back Office:



Click on Menu
Highlight **Menu Setup**

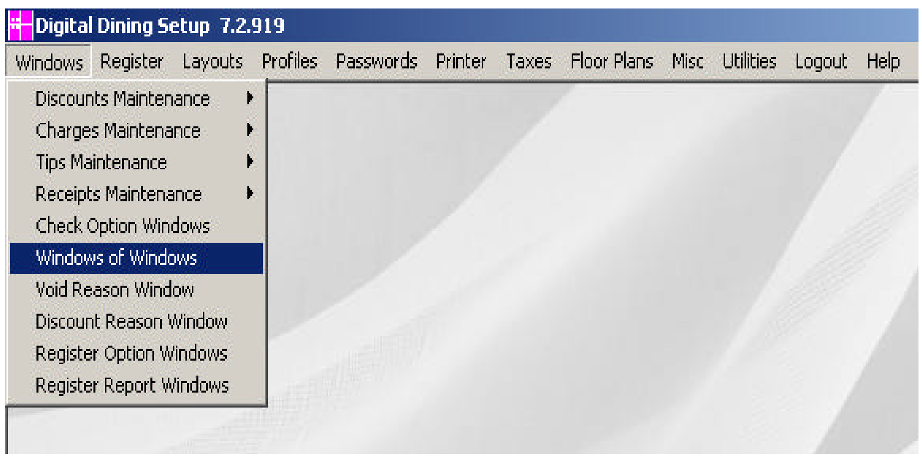
Highlight **Menu POS Windows** & click on it

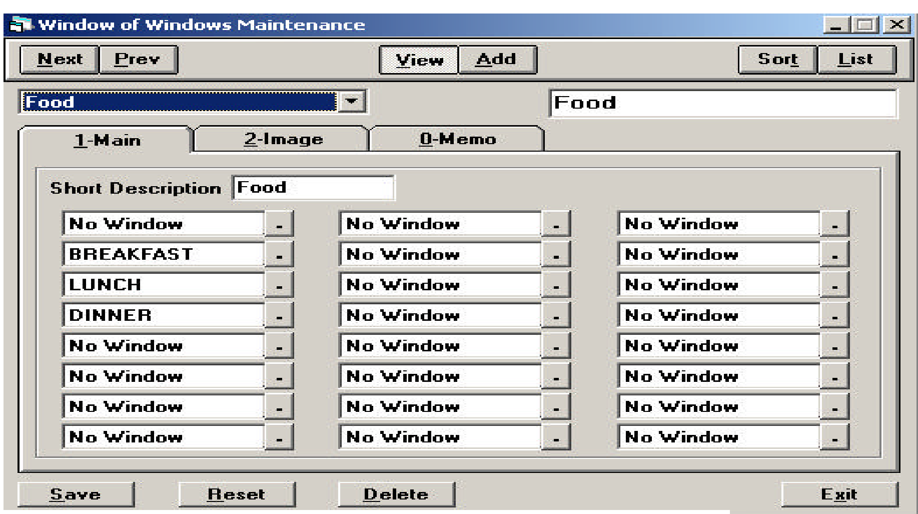
Click on **Add**
Type in the description, then hit the **Tab** key
Click on **Save**
Repeat for all new POS windows
Click on **Exit** when finished

Step 2. Adding the POS Window to the Point of Sale Screen

In Digital Dining Setup:

Click on **Windows**
Highlight **Windows of Windows** & click on it





Click on **Next** until you find the Window of Window you want to add this POS window to *(these Windows of Windows are the buttons across your top panel at the Point of Sale, i.e. Food, Liquor, Beer, etc.)*

Click on the ¨ next to the box where you want to add your new POS Window
Type in the 1st few letters of the name of the POS Window you are adding. Highlight it & click on **OK**

Click on **Save**
Repeat for all new POS Windows
Click on **Exit** when finished

ADDING A SPEED WINDOW

(OR ADDING TO IT)

IN DIGITAL DINING BACK OFFICE:

Step 1. Choose the **Menu > Menu Setup > POS Windows**.

Step 2. Find the Speed Window that you want to change **or** left click on **Add**.

Step 3. Name the new window (if you are adding, then) left click on the **Insert** button and find your menu item You will have to do this for each individual item you want to add.

Step 4. Left click on **Save** and **Exit.**

Step 5. If you do not currently have a Speed Window loaded on your POS, you need to do it now. In **Digital Dining Setup**, choose **Register Definitions** from the **Registers** drop-down menu.

Step 6. Find your POS that you want to use the Speed Window. Left click on the **Defaults** tab.

Step 7. **Speed Window 1** will be on the right of the screen at the POS. **Speed Window 2** will be on the left at the POS. **Speed Window 2** is typically only used on a bar terminal. Left click on the arrow next to the window you want to assign and find the name of the window you want to use. Left click on **Save** and **Exit**.

Step 8. Exit Digital Dining Setup and go back into Digital Dining Back Office.

Step 9. Choose **Menu Utilities** from the **Menu** drop-down menu and left click on **Build POS Windows**. Left click on the **Build Windows** button. When it is finished, **Exit**.

WINDOW OF WINDOWS DEFINITIONS

IN DIGITAL DINING SETUP:

Step 1. Choose **Window of Windows** from the **Windows** drop-down menu.

Step 2. Find the Window you want to add to or change and left click on **Add.**

Step 3. Name the new Window and left click on **View**.

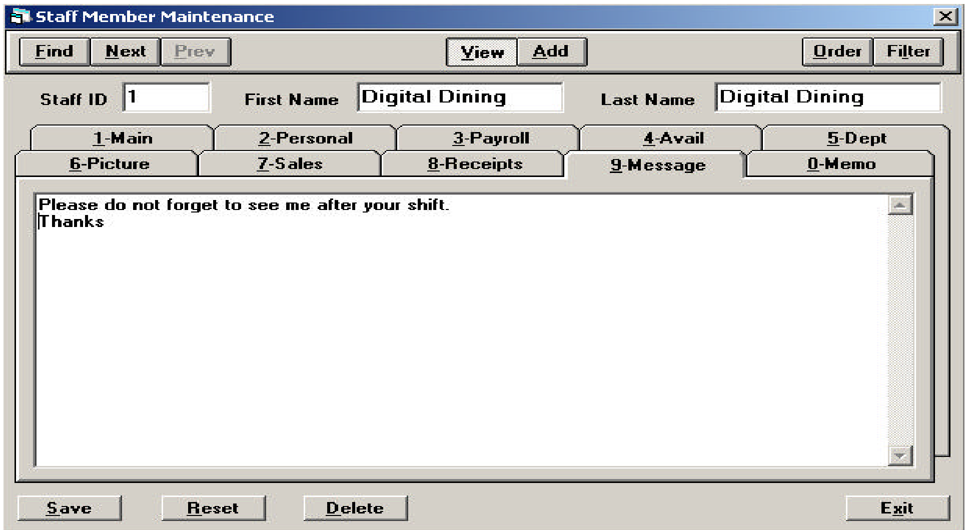
Step 4. Find the original Window and make any changes you want to make by left clicking on the button with the dot in it and choosing the item you want to appear in the Window.

Step 5. Left click on **Save** and **Exit**.

SENDING DD MAIL

SENDING MAIL TO 1 PERSON:

In Digital Dining Back Office:

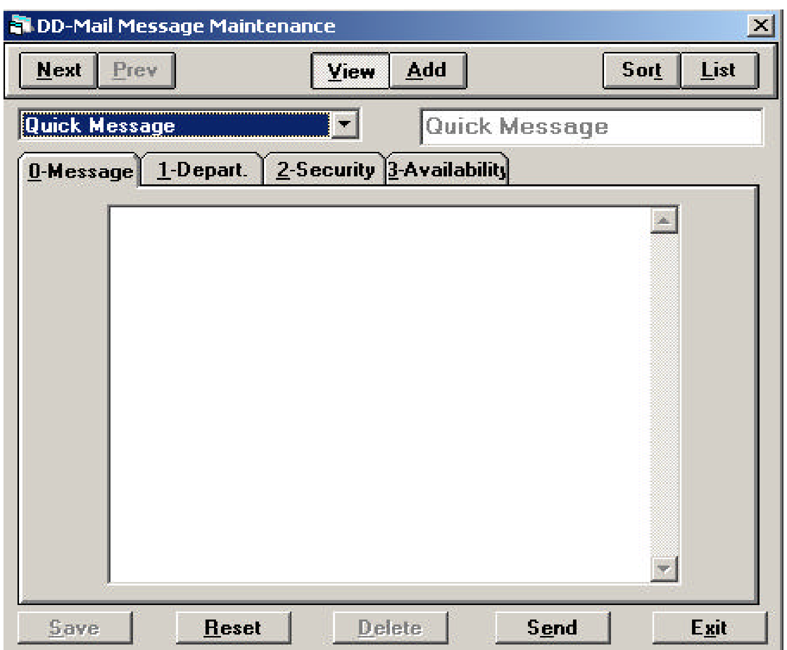


Click on **Staff**
Highlight **Staff Members** & click on it.

Click on **Find** in the upper left corner.
Type in the first few letters of the last name, highlight the name you are looking for (in the box to the right), then click on **OK (or simply enter the staff id in)**
Click on the **Message** tab

Click on the white box to get the cursor blinking on the message pad, then type in the message you want to send.
Click on **Save**
Repeat for all others that you want to send a message to, then click on **Exit** to get out.

SENDING E-MAIL TO AN ENTIRE DEPARTMENT OR ALL EMPLOYEES:



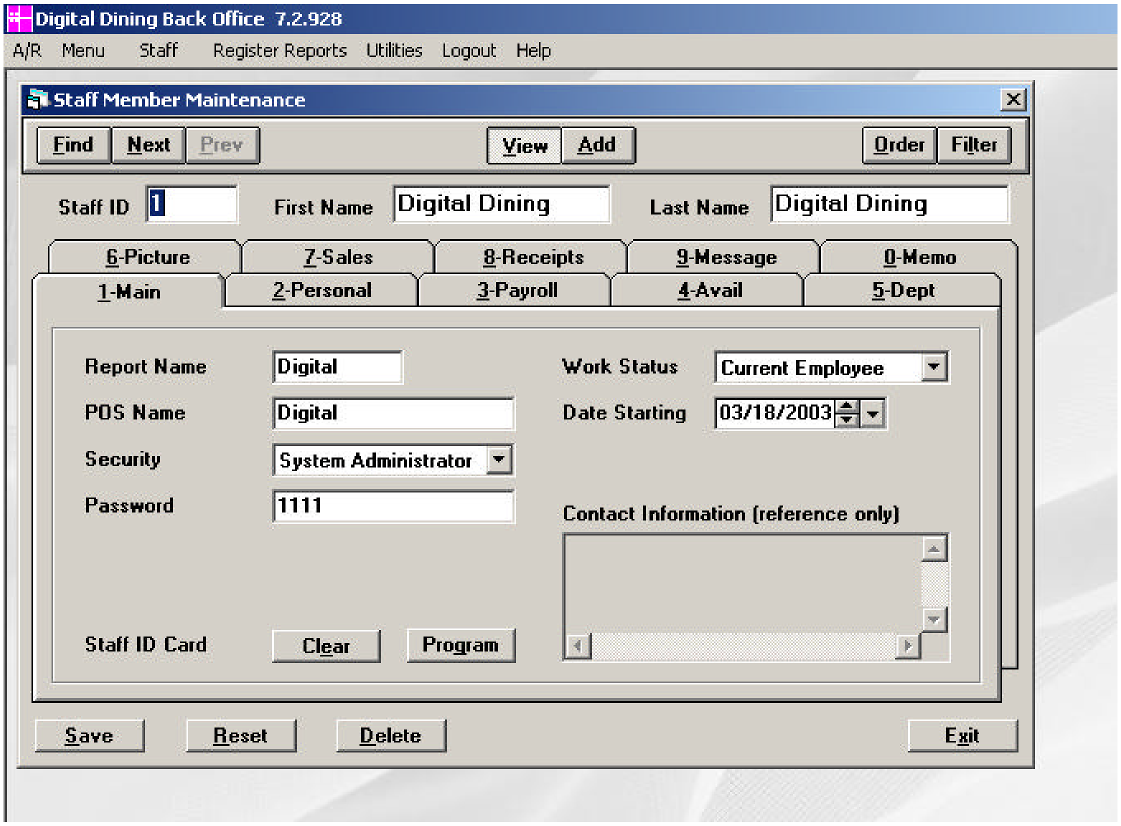
Click on **Staff**
Highlight **DD Mail** & click on it
Digital Dining automatically comes up to the **Quick Message**
Click on the white message pad & type in the message
Click on the **Department** tab & include or exclude the appropriate departments
Click on the **Rating** tab & include or exclude the appropriate rating levels
Click on the **Security** tab & include or exclude the appropriate security levels
Click on the **Availability** tab & include or exclude the appropriate availabilities Click on **Send** to send the mail Repeat or click on **Exit**

CLEARING DD MAIL:

Click on **Staff**
Highlight **DD Mail** & click on it
Click on the ? to the right of Quick Message & choose **Clear Messages**
Click on **Send**, then **Exit**
(Keep in mind that this clears ALL mail)

ADDING STAFF

In Digital Dining Back Office:
Click on **Staff**
Highlight **Staff Members** & click on it
(You will automatically come up to #1 –Digital Dining)



Click on **Add** on the top bar
<u>On the **Main** tab:</u>
Digital Dining will automatically go to the next available number & the cursor will be blinking on the first name
Type in the First Name, then hit the **TAB** key on your keyboard
Type in the Last Name, then hit **TAB**
Type in the Report Name or just hit **TAB** to accept the default from Digital Dining. (By default this is the last name)
Type in the POS Name or just hit **TAB** to accept the default from Digital Dining *(This is the name that appears on the guest check, so if William goes by Bill, type it in here. This is also the name that appears on the POS screens. To save confusion, we suggest also using a last initial here. i.e.; Bill S)*

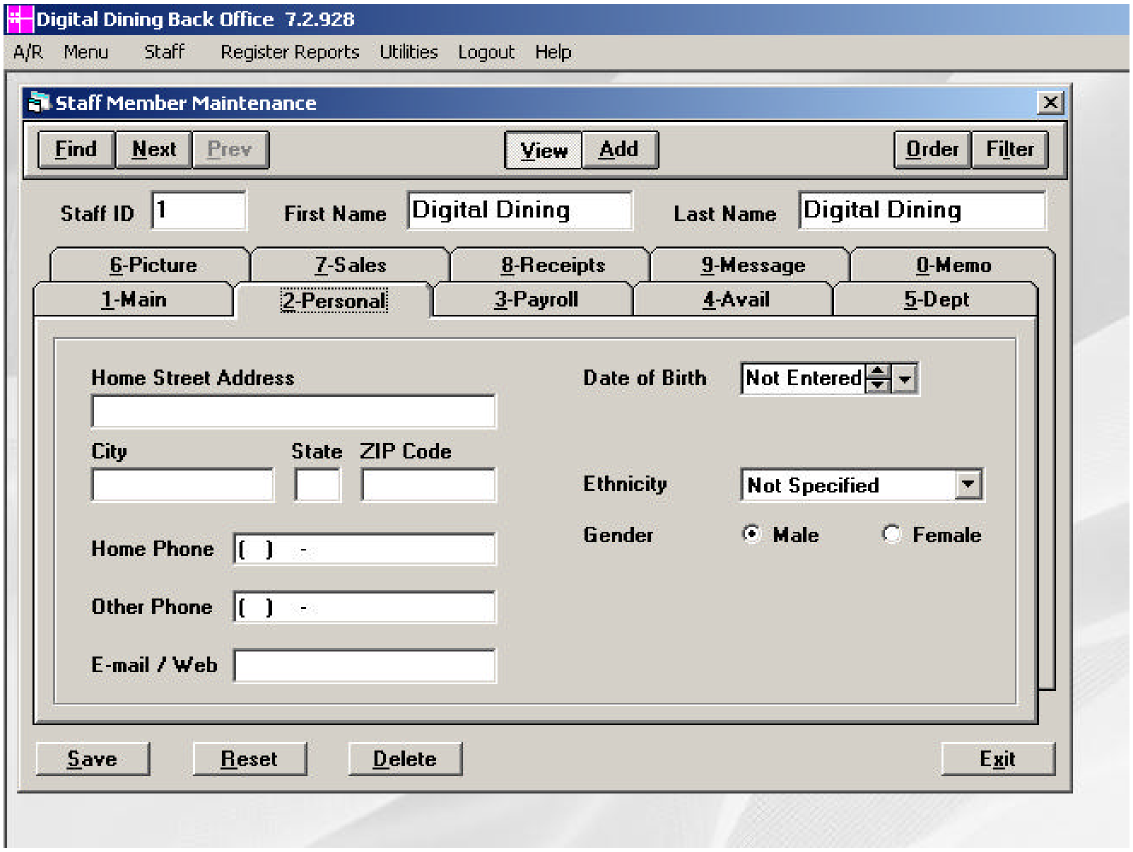
At Security, click on the ? to the right of the rectangle & choose the appropriate level
System Administrator = *Can do anything & everything*
Staff = *Can do nothing that is passworded*
Shift Supervisor = *Can only access passworded functions at the Point of Sale (can not access Back Office or Setup)*
Manager = *Can access passworded functions at the Point of Sale along with limited access to Back Office*

Enter the Password for this person
Verify that the employee status is set to active.
Starting Date is optional.

Enter the Payroll ID for this person *(optional)*, then hit **TAB**
Enter the Overtime Method for this person *(Click on the ? to the right of the rectangle to get the list)*
, then hit **TAB**
Make sure the box next to the word **Active** is Ö'd
Enter the Address & Phone Number *(optional)*

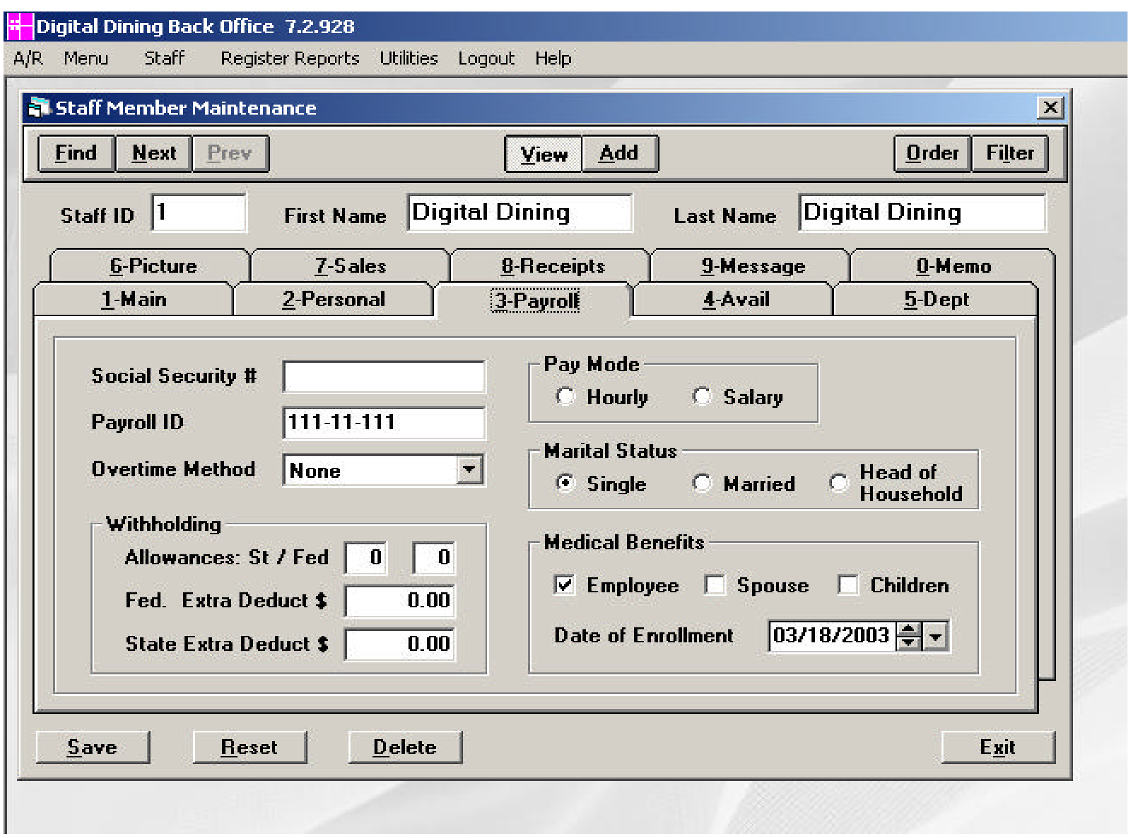
ADDING STAFF cont.

On the **Personal** tab:



Here is where useful information about an employee is entered. You will quickly find out what info you need to enter. We suggest that you at least enter the phone number.

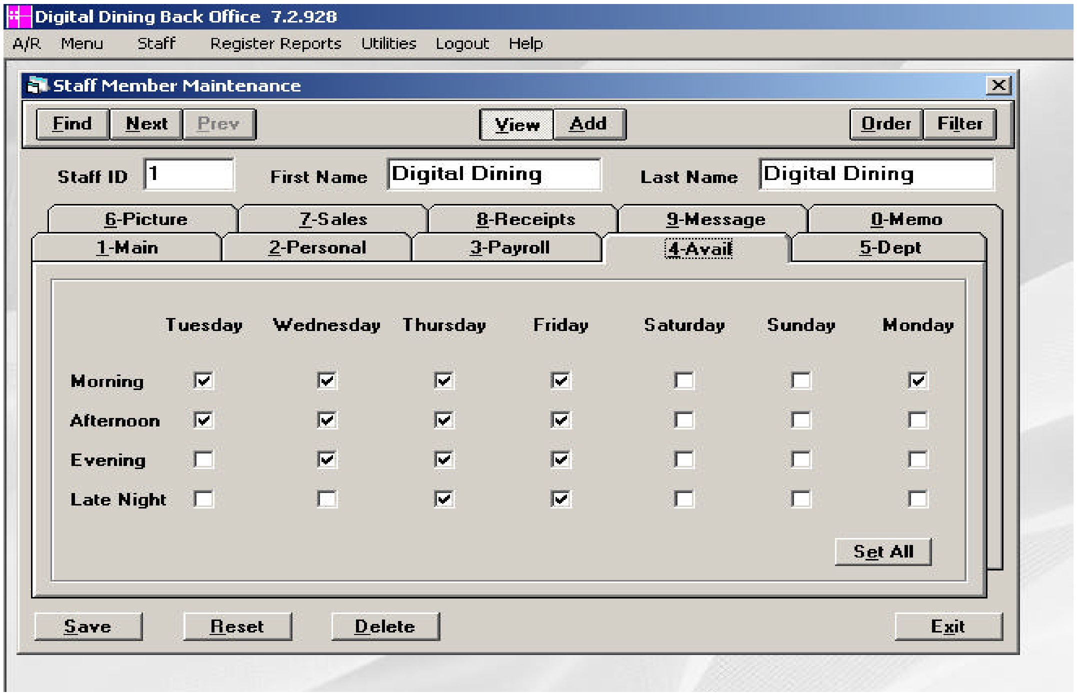
On the **Payroll** tab:



Here Useful payroll information may be added. For labor accounting purposes, you must at least choose the PAY MODE. This information must be entered if you are using the Digital Dining payroll module.

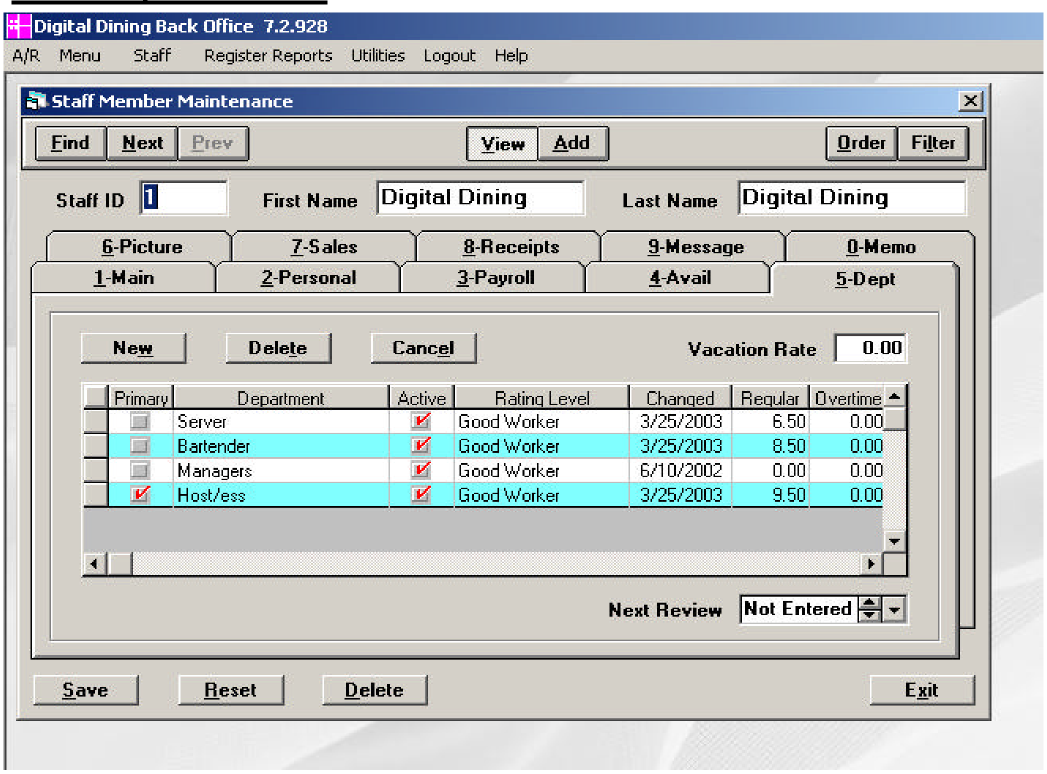
ADDING STAFF cont.

On the **Availability** tab:



This window allows management to quickly and easily check the availability of an employee. This is a great resource for last minute changes to the schedule.

On the **Department** tab:



To add the first department option, click on NEW, then click on the new space that has been added below the Department heading and select the desired department. Enter the Regular Rate, and the Overtime Rate if applicable. Enter the Worker Rating for this person *(Click on the ? to the right of the rectangle to get the list)*
Repeat for all departments necessary *(To delete a department, click on the desired department and then click delete. This will only work if the employee has never logged in hours for this department. This will zero out the rates of pay as well)*
Verify which department is set to primary as this will be the default when this person clocks in.
Click on **Save** at the bottom
Repeat for all staff to be added.
When finished, click on **View** to stay in Staff or **Exit** to get out.

TO PURGE INACTIVE STAFF

This should only be done once a year after the year has been closed out!!!

IN DIGITAL DINING BACK OFFICE:

Step 1. Choose **Staff** then **Staff Members**.

Step 2. Look at all Staff Members and uncheck the **Active** box for those you want to remove. When you are finished, click on **Exit**.

Step 3. Choose **Staff Utilities** from the **Staff** drop-down menu.

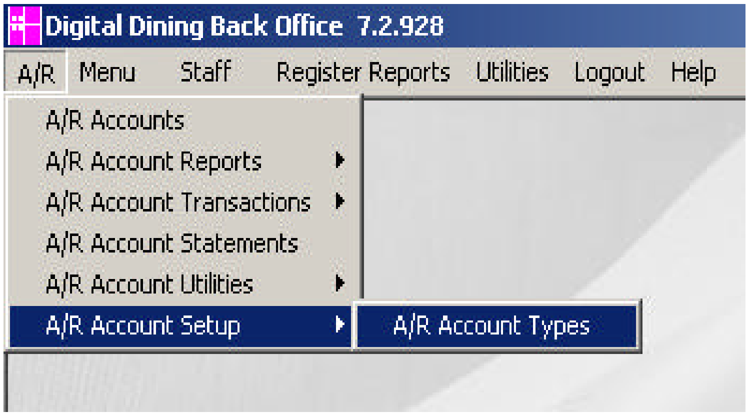
Step 4. Choose **Purge Inactive Staff**.

ADDING ACCOUNTS RECEIVABLES

In Digital Dining Back Office:

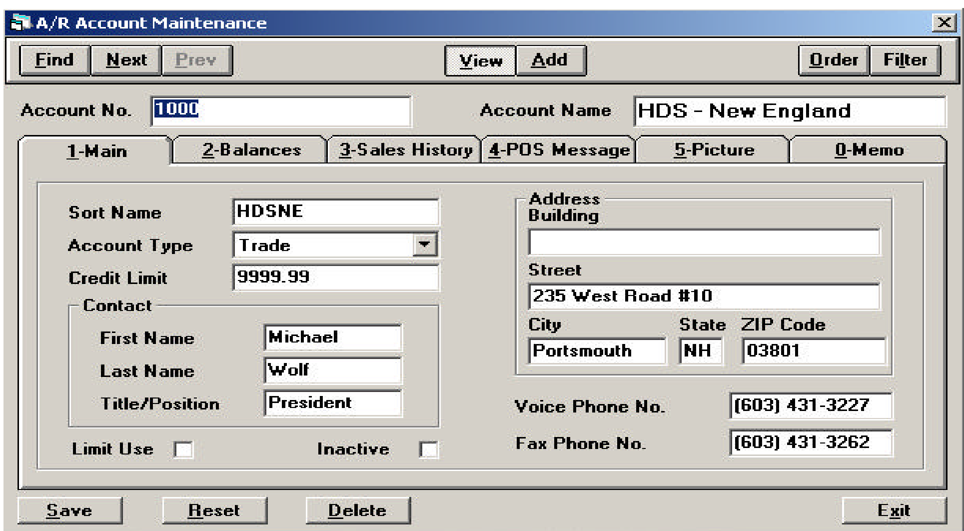
Step 1. *Be sure that Account Types are setup* Click on **A/R**
Highlight **A/R Account Setup**
Highlight **A/R Account Types** & click on it

Click on **Next** to scan through the list



If you need to add an account type, click on **Add**
Enter the description for the Account Type & hit **Tab**
Click on the ? next to the receipt type & choose **All**
If this Account Type is tax exempt, click on the ¨ next to **Tax Exempt** so that an **x** appears in it
Click on **Save**
Repeat for any other Account Type to be added
Click on **Exit** to get out

Step 2. Add the new account

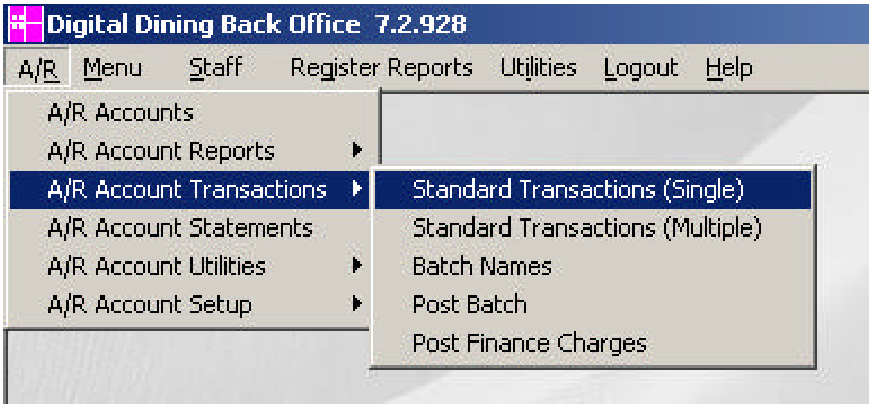


Click on **A/R**
Highlight **A/R Accounts** & click on it
Type in the account number for this *account (you must create an account number; the system will not automatically assign one)*
Type in the account name *(i.e. Mike Wolf)*
Type in the Sort Name *(Wolf if you want to look up this account by last name or Mike if you prefer to look up this account by first name)*

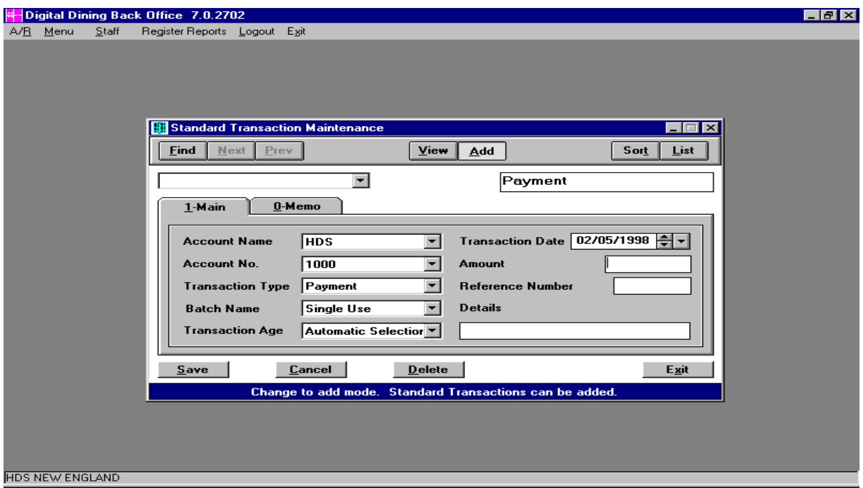
Choose the account type *(click on the ? next to Account Type to get the list)*
Type in the credit limit *(if there is one – this means that once the credit limit is reached, a manager's pass-word will be required to charge to the account)*
Type in the contact information *(this information is optional)*
Type in the address
Type in the phone number *(this information is optional)*
Type in the fax number *(this information is optional)*
If a manager approval is required to charge to this account, click on the ¨ next to **Limit Use** so that an **x** ap-pears in the box
Click on **Save**
Repeat for all accounts to be added
Click on **Exit** when finished

ACCOUNTS RECEIVABLES TRANSACTIONS

Entering a Payment Against an Account
In Digital Dining Back Office:



Click on **A/R**
Highlight **A/R Account Transactions**
Highlight **A/R Standard Transactions**
& click on it

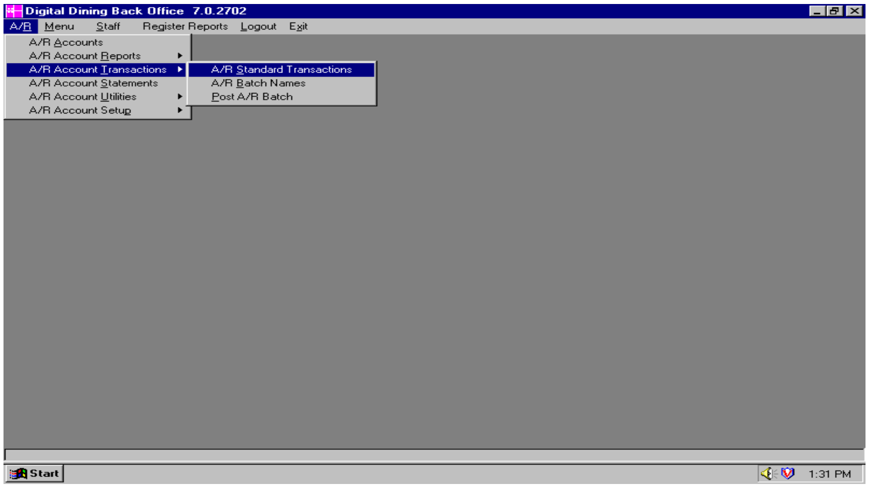


Click on **Add**

Click on the description block to the right & type in "**Payment**"
Click on the ? next to Account Name, highlight the correct account & click on it
Click on the ? next to Transaction Type& choose **Payment**

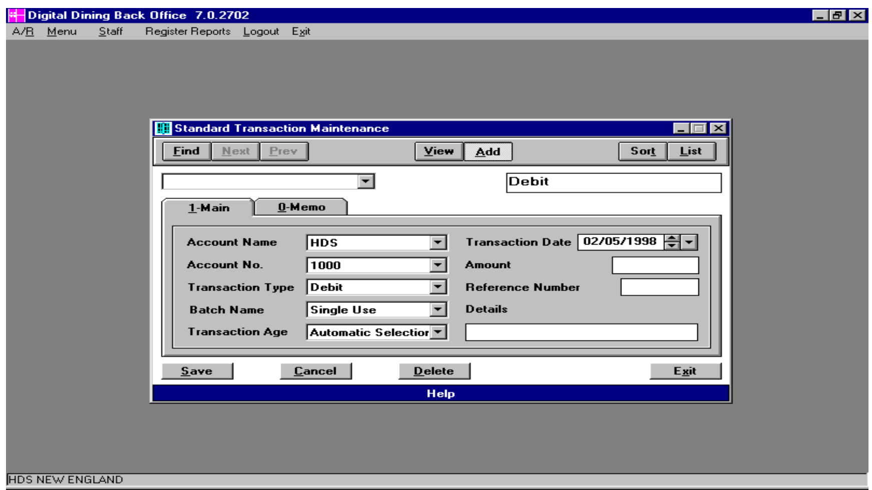
Click on the ? next to Transaction Age & choose **Auto Selection**
Enter the transaction date *(the date payment was received)*
Click on the ? next to Batch Name & choose **Single Use**
Enter the amount received
Enter a reference number *(such as the check number)*
Enter the details for this payment *(if there are any)*
Click on **Save**
Repeat for all other payments to be entered
Click on **Exit** when finished

ACCOUNTS RECEIVABLES TRANSACTIONS cont.



__Entering a Debit Against an Account__

(This would be used if you needed to add to the outstanding balance, for example if for some reason a guest check in the dining room was never charged to this account)



Click on **A/R**

Highlight **A/R Account Transactions**

Highlight **A/R Standard Transactions** & click on it

Click on **Add**

Click on the description block to the right & type in "**Debit**"

Click on the ? next to Account Name, highlight the correct account & click on it

Click on the ? next to Transaction Type & choose **Debit**

Click on the ? next to Transaction Age & choose **Auto Selection**

Enter the transaction date *(the date debit was for)*

Enter the amount of the debit

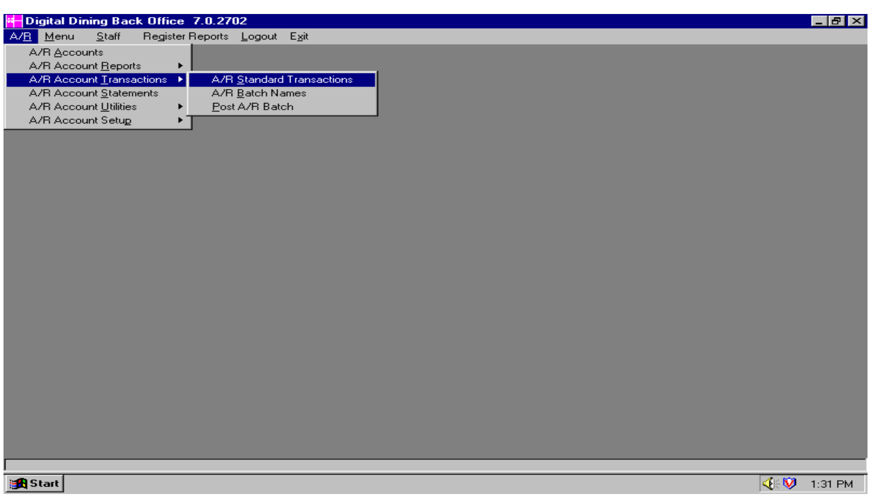
Enter a reference number *(if there is one)*

Enter the details for this debit *(the reason a debit is being applied)*

Click on **Save**

Repeat for all other debits to be entered

Click on **Exit** when finished

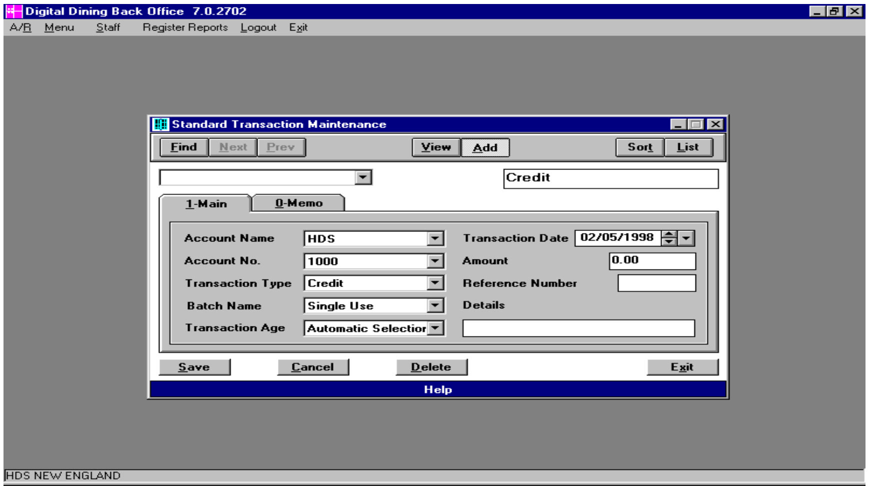


__Entering a Credit Towards an Account__

(This would be used if you needed to subtract from the outstanding balance, for example if for some reason a guest check in the dining room was charged to this account by accident)

ACCOUNTS RECEIVABLES TRANSACTIONS cont.

Click on **A/R**



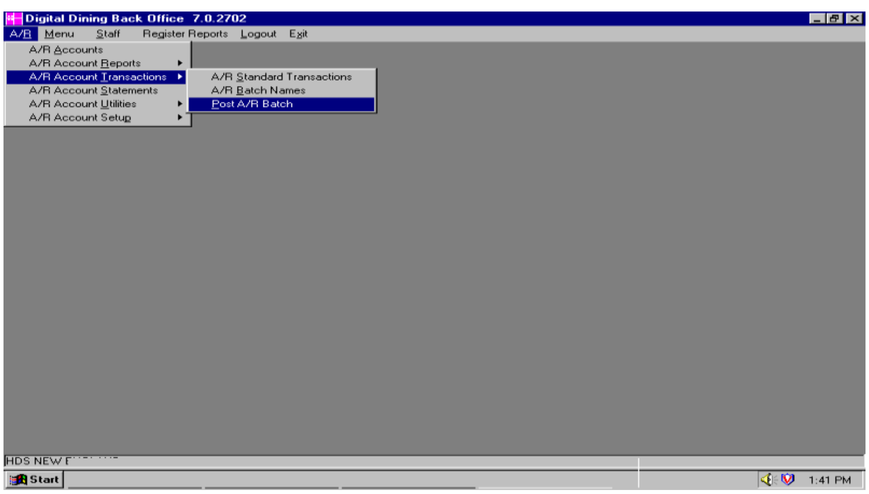
Highlight **A/R Account Transactions**

Highlight **A/R Standard Transactions** & click on it

Click on **Add**
Click on the description block to the right & type in "**Credit**"
Click on the ? next to Account Name, highlight the correct account & click on it
Click on the ? next to Transaction Type & choose **Credit**
Click on the ? next to Transaction Age & choose **Auto Selection**

Enter the transaction date *(the date credit was for)*
Enter the amount of the credit
Enter a reference number *(if there is one)*
Enter the details for this credit *(the reason a credit is being given)*
Click on **Save**
Repeat for all other credits to be entered
Click on **Exit** when finished

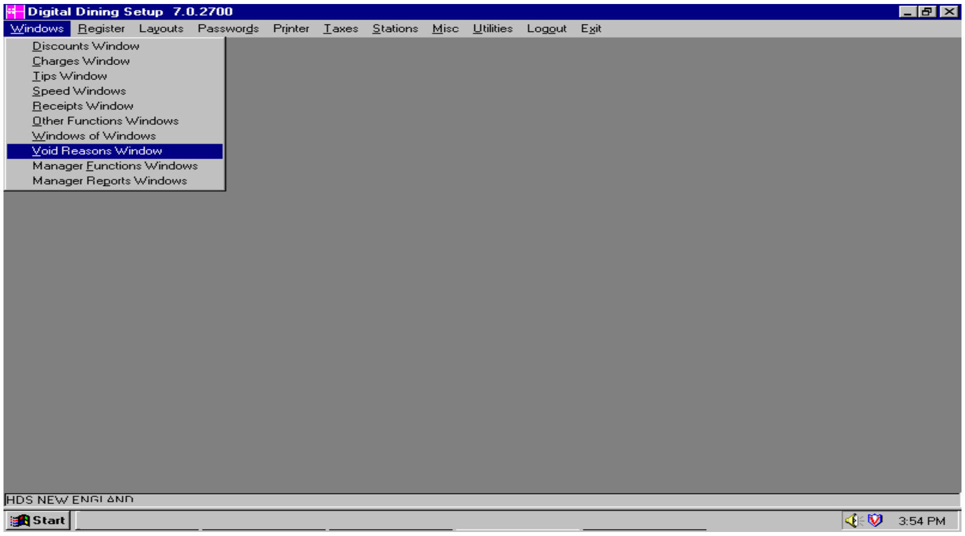
**** Once you are finished entering all of your transactions for the day you MUST do the following for the these transaction to show up on the statements:**



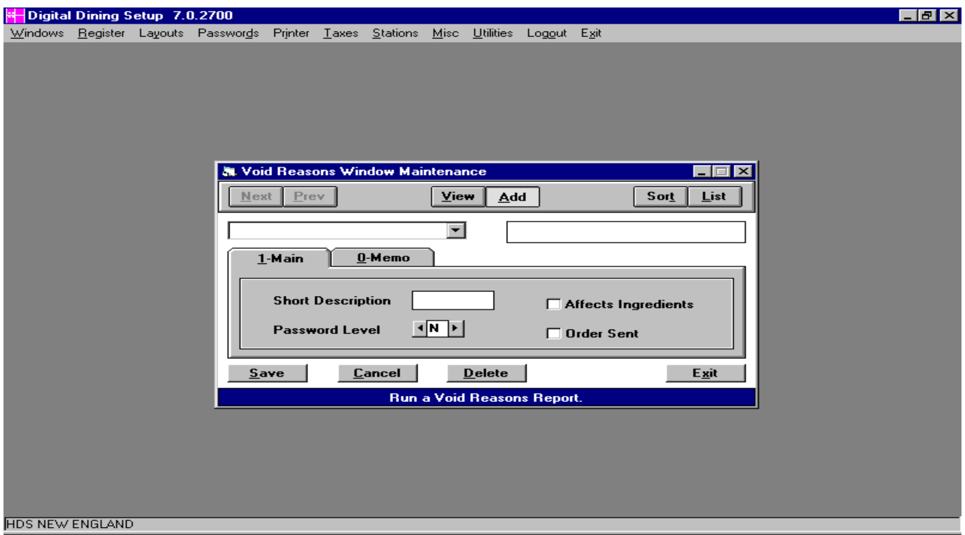
Click on **A/R**
Highlight **A/R Account Transactions**
Highlight **Post A/R Batch** & click on it
Click on the ? next to **Batch Method** & choose **Single Use**
Click on **Post**
Click on **OK**
Click on **Exit**

ADDING VOID REASONS

In Digital Dining Setup:



Click on **Windows**



Highlight **Void Reasons Window** & click on it

Click on **Add**
Type in the description of the new void reason & hit the **Tab** key
Select the password level for this reason

0 *= A password is required, but any password will work (this is for tracking purposes)*
N *= No password is required*
X *= No one can use this void reason (you want to keep the reason for reporting purposes, but it is no longer in use)*

If this void reason should subtract from inventory, click on the ¨ next to **Affects Ingredients**

If you want the cancelled order to print in the kitchen or at the bar, click on the ¨ next to **Order Sent**

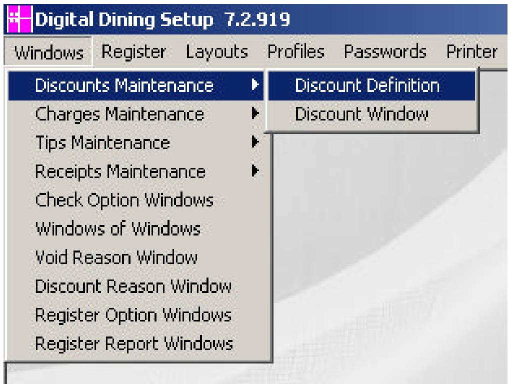
Click on **Save**

Repeat for all new void reasons

Click on **Exit** when finished

ADDING DISCOUNT REASONS

In Digital Dining Setup:



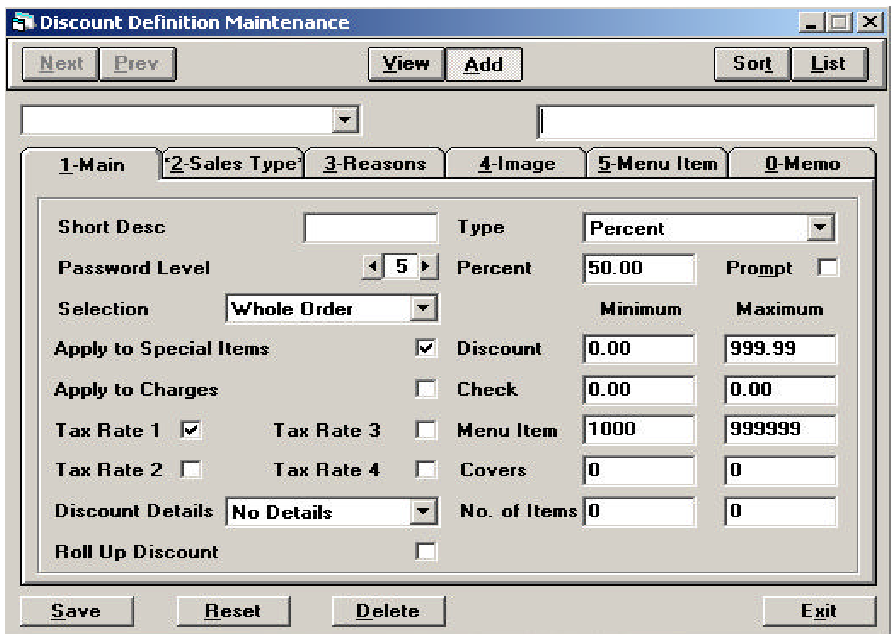
Click on **Windows**
Highlight **Discounts Maintenance** then **Discount Definition** click on it

Click on **Add**

On the **Main** Tab:

Type in the description of the new discount reason & hit the **Tab** key

Select the password level for this reason
0 *= A password is required, but any password will work (this is for tracking purposes)*
N *= No password is required*
X *= No one can use this void reason (you want to keep the reason for reporting purposes, but it is no longer in use)*



ADDING DISCOUNT REASONS cont.

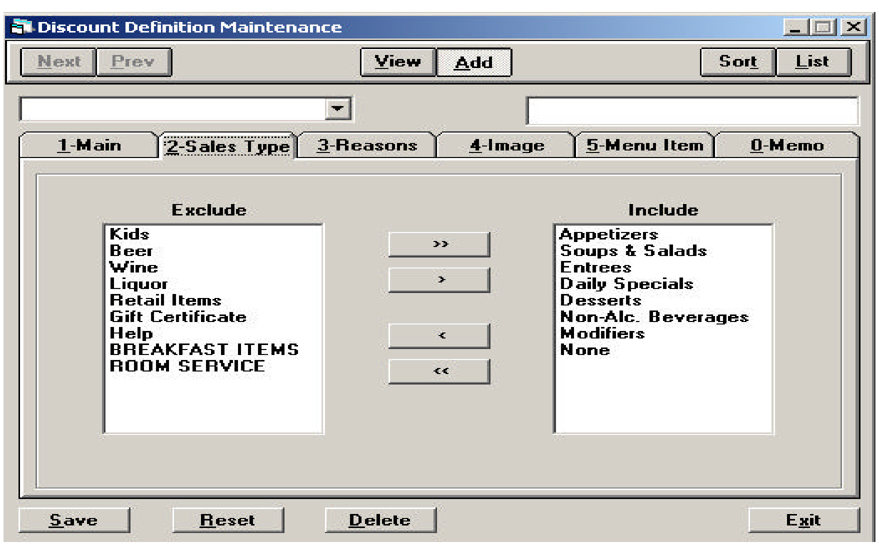
Choose the **Selection** by clicking on the ? *(which items are included in the discount)*

Last Ordered *= Just the very last item ordered will be discounted*
Whole Order = Everything on the check that meets all of the other criteria will be discounted
First Entry On Check = Just the very first item ordered on the check will be discounted
Marked Items: Once = Allows you to choose which item will be discounted (one per check)
Marked Items: Each = Allows you to choose which items will be discounted (unlimited per check)

*If special items are included in this discount, click on the ¨ next to **Special Items***
If the tax should be backed off (meaning the customer only pays tax on the amount actually paid for), *click on the ¨ next to the appropriate tax code.*
Tax 1 = Food
Tax 2 = Beverages
Tax 3 = Retail Items
If the customer pays the tax on the full amount before discount, then none of the tax rates should be checked.
*If this discount is a percentage, click on the drop down box next to **Type.** Select **Percent.** If this discount is a set dollar amount or is an amount to be entered at the Point of Sale, select **Flat Amount.***

Enter the amount (If **Percent** is selected, this amount will be the percentage. If Flat Amount is selected, this will be the set amount to be deducted. If you want to enter the amount at the Point of Sale, check off the Prompt box .)
Enter the minimum discount amount (usually 0.00)
Enter the maximum discount amount (for example, with the dine around cards, if the discount is buy 1 entrée, get a 2nd entrée free, up to $20, the maximum should be $20.00. Otherwise, set the maximum to 999.99)

*On the **Sales Type** Tab:*



Be sure to include all sales types that apply & exclude all sales types that do not apply (for example, employee discounts generally do not include beer, wine or liquor, so they would be excluded.)
*Click back on the **Main** Tab*
Click on **Save**
Repeat for all new discount reasons
Click on **Exit** when finished

ADDING PAID OUT REASONS

IN DIGITAL DINING SETUP:

Step 1. Left click on **Misc** then on **Paid Outs**.

Step 2. Left click **Add**.

Step 3. Type in the description you want to use.

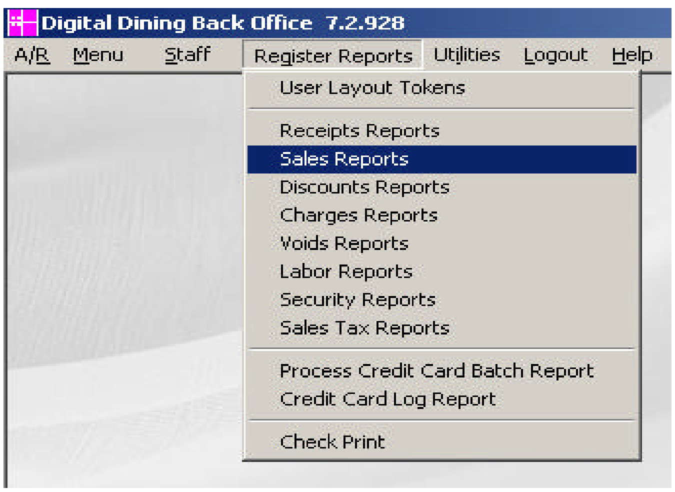
Step 4. Set the password level, if desired.

Step 5. Enter a cap for the maximum allowable paid out.

Step 6. Left click on the **Save** button. At this point you may continue to add new paid out reasons, or exit.

DEFINING SALES REPORTS

IN DIGITAL DINING BACK OFFICE:

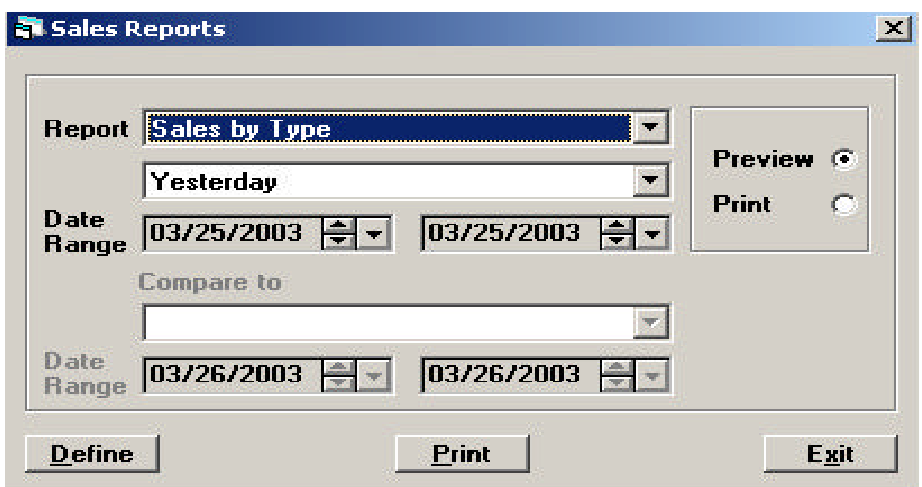


Log On

Click on **Register Reports**
Highlight **Sales Reports**, then click on it

Click on Define in lower left corner

Click on Add



DEFINING COLOR PALLETS

IN DIGITAL DINING SETUP:

Step 1. Left click on **Register Pallets** from the **Register** drop-down menu.

Step 2. Find the pallet you want to change and left click on **Add**.

Step 3. Name the new color pallet and then left click on **View**.

Step 4. Go back to the original color pallet and left click on each button. This will enable you to choose custom colors for the button and the text.

Step 5. When you have chosen the colors you want left click on **Save** and **Exit**.

CHECK LAYOUT

IN DIGITAL DINING SETUP:

Step 1. Choose **Layouts** then **Check Layouts**.

Step 2. Find the Check Layout that you want to modify and click on **Add**.
Do not modify any **Default** *layouts!!!*

Step 3. Name the new layout “Backup” and left click on **View**.

Step 4. Find the original layout and make any necessary changes. For a list of tokens and what they mean, use p. 231-355 in your Digital Dining Setup Guide.

Step 5. Click on **Save** and **Exit** when you are finished.

RESTARTING THE CREDIT CARD SERVER

FROM THE DESKTOP:

Step 1. Left click on the DDCDSRV box at the bottom of the screen.

Step 2. Left click on the **Command** button on the right side of the box.

Step 3. Left click on the **Start** button on the right side of the box.

Step 4. Wait until the text box reads “Waiting for request” and left click on the minimize button (minus sign) in the top right corner of the screen.

IF THE COMMAND BUTTON IS GREY THEN YOU NEED TO:

1. HOLD DOWN THE **CTRL** AND THE **ALT** KEYS AND TAP THE **DELETE** KEY.
2. CLICK ON **TASK MANAGER** AND HIGHLIGHT THE **DDCDSRV** THEN CLICK **END TASK**.
3. UNPLUG CREDIT CARD MODEM (BLACK BOX ON THE PC WITH “DATACAP” WRITTEN ON IT).
4. PLUG IT BACK IN.
5. CLICK ON THE DDCDSRV ICON AND WAIT FOR THE TEXT BOX TO READ “Waiting for Request”.
6. LEFT CLICK ON THE MINIMIZE BUTTON (MINUS SIGN) IN THE TOP RIGHT CORNER OF THE SCREEN.

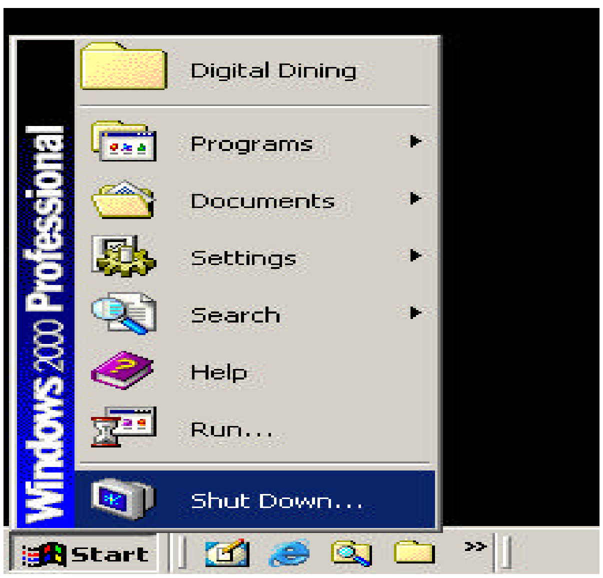
SHUTTING DOWN YOUR SYSTEM

<u>*** WARNING:</u> This should be done <u>ONLY</u> in extreme circumstances *(i.e. your electrician needs to shut down the circuit or your entire system is locked up, which happens <u>VERY RARELY</u>.)* Should you need to shut your system down, follow these directions exactly!!!

<u>At EVERY Workstation:</u>
Touch **Exit Register** *(enter manager ID & Password, if necessary)*
Touch **Shut Down** *(enter manager ID & Password, if necessary)*
Turn off your workstation when the screen displays the message "**It is now safe to turn off your computer**."
Repeat for ***<u>ALL workstations</u>***

<u>On the Office Computer (the file server):</u>
Click on each minimized program *(the rectangles on the bottom of the screen)* & close them by clicking on the **X**'s in the upper right corners of their boxes. *(If you have Digital Dining's credit card module, you will be unable to close this program, labeled DDCCSRV – this is the **ONLY** program that is okay to leave open before shutting down.)*

Once ***ALL*** programs are closed, click on **Start** in the bottom left corner of your screen



Highlight **Shut Down** & click on it

Make sure that "**Shut Down Computer?**" is checked
Click on **Yes**
Your Computer should now shut down all on its own.

<u>To Restart Your Computer:</u>

Hit the power button on your computer
The computer will automatically load all of the programs necessary to run Digital Dining.

<u>Go To Each Workstation:</u>

Turn the workstation back on.
The POS will restart itself, loading all of the programs necessary to run Digital Dining

RESTARTING YOUR SYSTEM

To Restart Your Computer:

Click on **Start** in the lower left corner of the screen
Click on **Shut Down**
Click on "**Restart the Computer?**"
Click on **Yes**
The computer will go through the restarting process

Go To Each POS:
Exit the POS Register to the OS.
Touch **Start** in the lower left corner of the screen
Touch **Shut Down**

Touch "**Restart the Computer?**"
Touch **Yes**
The POS will restart itself, loading all of the programs necessary to run Digital Dining