



# MenuPoint User Manual

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## Chapter 1

# Welcome to MENUPOINT

Congratulations on choosing Samco's MenuPoint. This module was built from the ground up to offer food and beverage service providers a flexible, reliable and usable solution without being tied to a proprietary hardware or operating system platform. The standard Windows platform means that you can take advantage of readily available industry standard equipment.

### Installation

MenuPoint installs like any other Samco application using the instructions in the Installation Guide.

After MenuPoint is installed on your server, you will need to go to each station and load the printer controller and the touch screen. Go to the Windows command prompt , change to the SSI directory and run the program:

```
C:\SSI>TOUCH.BAT
```

You will also want to place both the Samco Printer Controller and Samco Touch Screen in the startup menu, so that it will load whenever the user turns on the Point of Sale Touch Screen station.

If you wish to automatically post the end of day at a certain time, you will need to place the program MPAPST.COB in the startup menu. Do this by copying the Samco Touch Screen icon, rename it Samco Auto-post and change the properties, target from:

```
C:\SSI\wruncbl.exe -C CONFIG MPOBJ/TOUCH to;
```

C:\SSI\wruncbl.exe -C CONFIG MPOBJ/MPAPST.COB XX (where XX is equal to the company ID)

Later, in the MenuPoint control file you will set the field, “Time for auto-post to occur” to the desired time.

## Features and Functions

- Easy to use touch screen
- Jumbo buttons, fully customizable
- Menus, activated by time of day
- Multiple sales locations and stations
- Customizable lists
- Floating tables
- Server X readings
- Modifiers on menu items easily changed to fit your application
- Receipt routing to up to nine different printers
- Fast key modes are ideal for bars and fast food operations
- Multi-currency
- Overhead costs may be added to items
- Onetime promotions
- Guest check review
- Tender movement
- Transaction reversal with security status
- Transaction by business day rather than calendar day
- Cash paid outs
- Prepaid items may be added to tab, like lottery tickets, cigarettes without affecting server’s cash
- Discounts and surcharges may be predetermined with optional operator override
- Receipt printers in two colours with partial tear off supported
- Scale support for liquor inventory management
- Item price groups for easy price changes

## Setting up MENUPOINT

Before you can begin using MenuPoint you will need to set up a number of master files. The following chapters deal with these. Samco provides the basic receipt forms and screen layouts; the screen layouts will need to be modified to use your menu items.

## On-Line User Manuals

If you need assistance, this user manual is available on-line and can be accessed at any time by pressing [F10] ([F11] under Windows).

## **Samco Support**

This manual, in combination with your Installation Guide, is designed to allow you to use Samco's application software without any additional help.

However, if you encounter problems you cannot resolve by referring to these manuals, you may want to get additional assistance. Your supplier should be able to provide such assistance.

Or, contact:

SAMCO SUPPORT  
UNIT 61, 7789 - 134TH STREET  
SURREY, B.C. CANADA  
V3W 9E9  
PHONE: (604) 597-4211 FAX: (604) 597-7320  
E-mail: [support@samco.com](mailto:support@samco.com)

Samco provides support on a fee-for-service basis. Please ensure that you have the software release, serial number(s), operating system, payment information (Visa, MasterCard) and other related information available when you call.

For a detailed description of Samco's support and customer services, please refer to the installation guide.



## Chapter 2

### Setup MenuPoint: Basic Files

#### Company file

This first thing to setup for MenuPoint is the Company Data. Go to System Functions, Company Data and enter in the general information required to set up the company. See the System Functions manual for more details on this feature.

#### General Ledger Accounts

If you do not have the General Ledger Module, go to System Functions, Valid G/L Accounts, Enter Valid G/L Accounts. Enter the account number and its description in the list. You will need at least the following G/L accounts for MenuPoint.

- Bank accounts for the various tenders you use
- Taxes Payable accounts for GST and PST
- Sales accounts
- Expense accounts
- Overhead cost account
- Refund account
- Paid Out account
- Received on Account

If you have the General Ledger Module, go to the G/L, Chart of Accounts and enter the accounts there. See your G/L manual for details of this.

#### Setup Tax types



Go to System Functions, Taxes, Tax Types, Enter. Set up the tax types that collect monies for remittance to a government authority. Typically you will need GST and PST. Say “Yes” to “Track exempt” and “Track zero-rated” and “No” to “Distribute tax”. Accept the defaults for all other screens.

If you want to have more details on this function, please see the System Functions manual. You will not need to set up Tax Groups or Tax Codes here. This will be done later in the MenuPoint Setup under the Control file and Tax Groups.

#### PRICE TYPE: ONE TIME

Go to MenuPoint, Setup, Price Types. Enter a code ONE for a price type that will be used for price changes at the MenuPoint touch screen (instead of the MenuPoint back office options).

The entries to the various fields are:

Price Type	ONE
Description	One Time
Remove price at closing	Y
Always use this price	Y
Starting Date	F1 for “Earliest”
Ending Date	F1 for “Latest”
Monday	Press F2 for “All day”
Tuesday	Press F2 for “All day”
Wednesday	Press F2 for “All day”
Thursday	Press F2 for “All day”
Friday	Press F2 for “All day”
Saturday	Press F2 for “All day”
Sunday	Press F2 for “All day”

In this way, a manager may change the price of an item from the touch screen at any time; this is a convenient way to put on specials.

#### MenuPoint Control File

Go to MenuPoint, Setup, Control File . See Chapter 3 for the details of this.

## Tender Codes

Go to MenuPoint, Setup, Tenders. Setup the various tender codes for the money and credit cards that you accept. A typical CASH setup would look like this....

Tender code	CASH
Description	Cash
Conversion Factor	1.00 (Enter the exchange rate for USD if this is \$US)
Account #	1010-000 (G/L Account)
Open drawer when used	Y
Outside auth. Required	N
Authorization program	N/A
Button Label	Cash
Button Color	Green (? Gives list of color selections)

## List of Tender Codes

Go to MenuPoint, Setup, Lists, Enter. Setup a tenders list with all your tender codes from above. A typical tenders list would look like this:

List Code	TENDERS		
Description	Tenders		
Button Color	10 Bright Blue (? Gives list of color selections)		
Button Label	Tenders		
Seq	Code	Code	Description
10	T	CASH	Cash
20	T	VISA	Visa
30	T	MC	MasterCard
40	T	AMEX	American Express
50	T	DEBIT	Debit Card
60	T	USD	U.S. Funds

## Printer types and devices

Go to MenuPoint, Setup, Printer Types, Load. This will load the standard printer types supplied by Samco.

Go to MenuPoint, Setup, Printer Types, Enter. A “?” in the Printer Type field will give you a list of the printer types provided by Samco. Be sure that your various printers are represented in the list of supplied types.

Go to MenuPoint, Setup, Printer Devices, Enter. The information about the actual printer is entered here,

Printer device	BAR	(Three character code)
Description	Lounge bar printer	(Identify location)
Station ID	_____	(Leave this blank at initial setup)
Printer type	CIT	Citizen 3540 (“?” returns list of printer types)
Prioritize output	Y/N	(Y means to get priority from the sales category of the item)
Output by seat	N	
Alternate printer	“None”	(If this printer is down, use the printer specified here)

After the stations are set up, you will return to the printer device setup and enter the Station ID.

This completes the basic codes that are needed before proceeding with the rest of the MenuPoint setup.



## Chapter 3

### Control File

Go to MenuPoint, Setup, Control File. This file will provide MenuPoint with some general information about your application.

Multiple sales locations?	Y/N	
Allow tabs to cross locs?	N/A	
Auto create retail prices only)	N/A/M	(Never, All locations, Main location)
Overhead cost account	5010-00	(Profit centre may be wild-carded)
One time price type screen)	ONE One time	(Used for price changes at the touch screen)
Round prices to nearest	P/N/D/Q	(Penny, Nickle, Dime, Quarter)
Next trx sequence no	99,999,999	(Bill number that appears on receipt)
Next tab sequence no	99,999,999	
Next printer job bo	99,999,999	
Default item button color	4	(Cyan)
Default list button color	10	(Bright Blue)
Default func. Button color	5	(Red)
Auto-close zero-balance bill	N/S/P	(Never, At Send Bill, At Print Bill)

Interface to inventory? (module)	Y/N	(Y only with the Samco Inventory Plus module)
Interface to G/L? (Ledger module)	Y/N	(Y only with the Samco General Ledger module)
Tax type	Add on tax account	Included tax account
PST	2010-00	2012-00
GST	2015-00	2015-00
Inventory Types	1-9	
Printer outputs	1-9	(Where the printer devices are located)
Seconds before reporting printer errors	1-9999	(Default 90)
Seconds before rerouting printer	1-9999	(Default 180)
Seconds after initial report to report again	1-9999	(Default 300)
Time for auto post to occur or F1 for never)	4:00 AM	(HHMM, where HH =1-24)

A hotel may have one MenuPoint module with a number of sales locations, eg. Lounge, sports bar, and restaurant. Each of these would be a separate sales location. The servers may need to transfer a tab from the lounge to the restaurant.

Colors Available:

1	Black	9	Dark Grey
2	Blue	10	Bright Blue
3	Green	11	Bright Green
4	Cyan	12	Bright Cyan
5	Red	13	Bright Red
6	Magenta	14	Bright Magenta
7	Brown	15	Yellow
8	Light Grey	16	White

The auto-close a zero balance bill means that the server will not be prompted to close a bill that has been tendered in full. This is useful for counter type sales, where you want as few steps as possible. However, you may still want to always print a customer bill; in that

case, you would force a “Print Bill” by leaving the bill on the display area until it is printed. You may however, want to automatically close the bill at “Send Bill” which would close the bill and not print a customer receipt; this means that a bill would be tendered in full, and closed and thus, disappear from the display area.

Inventory types are used to determine the warehouse location to draw goods from. The inventory type is also used when printing the Hourly Report. You may select and sort this report by inventory type.

Each station will have its own receipt printer, but printer outputs for the kitchen and bar chits need to be identified here. When a ticket is entered for an item that must print out in the kitchen for the staff to start preparing, the “Send bill” function will check the item for the printer output.



## Chapter 4

### Sales Locations

A hotel may have one MenuPoint module with a number of sales locations, eg. Lounge, sports bar, and restaurant. These sales locations are set up here.

If the control file is set to “Multiple sales locations - No”, the location code is automatically 00. If there are multiple sales locations, the first or main location is set to 00.

Sales location	00	
Description	Main Lounge	
Auto tend cash	Y/N	
Auto receipt print	Y/N	(Y to print receipt immediately when bill is sent)
Guest checks required	Y/N	
Auto new bill	Y/N	(If Y, a new bill is started when an item is selected)
Force guest check review	Y/N	
New bill ask for table	Y/N	(If N, the server will not be asked for a table #)
New bill ask for #guests	Y/N	(If N, the server will not be asked for # of guests)

Auto-close zero-bal bill	N/P/S	(If N, the server will not be prompted to close the bill)
Message text		(Window for text, 400 characters to scroll touch screen)
Message text color	1-16	
Message background color	1-16	
Message scroll hunds/secs	1-999	(Scroll speed, 1= 1/10 second)
POS count qty no. to use	1-5	
Profit centre	00	(n/a if single section GL account number)
Tender move list	TENDERS	
End of day cutoff hour	4	(Valid hours are 1-6 or F1 for "none")
Server sign on method	C/K/B	(Card swipe only, Keypad only, Both)
Cash tender \$5/\$10/\$20/\$50	Y/N	(These buttons will appear in the cash window)
Exception item type	M	
Exception item code	999	(eg Used for "Take Out" when table service the standard)
Location receipt headers	WELCOME TO	(Headers to add to the appropriate form)
Location receipt footers	THANK YOU	(Footers to add to the appropriate form)
Location receipt exception messages	***TAKE OUT***	(Add to output forms)

For a POS setup where there is counter service only, the following flags would be appropriate for fast entry.

Auto new bill Y, New bill ask for table N, New bill ask for #guests N.

Auto-close zero-balance bill has the options - N = Never, P = only after Print, S = only after Send bill or print. If "Never" is chosen, the user will always be prompted before closing a bill. If P, a bill that has been fully tendered and the receipt printed, will automatically close without prompting the user. If S, a bill that has been sent or the receipt printed, will automatically



be closed if it has been fully tendered; this option means that it is not necessary to print a receipt, only if the patron asks for one.

If the “Guest check required” is set to No, the server or counter person does not have to start a new bill for the transactions. These non-bill cash transactions are quick for items like a bag of chips sold over the counter. The “Auto tend cash” flag only applies to these non-bill cash transactions. If it is set to No, the server must enter the amount tendered and the system will calculate the change. If it is set to Yes, the server does not need to enter the amount in, and must calculate the change to be given the patron.

The exception item and exception messages are used for a situation where it is necessary to print on the outputs to the kitchen that the order has an exceptional status. For example, if table service is the norm, the kitchen staff will need to know for each line item that it is a take out order. This message will stand out for the kitchen staff when they pick up the chit. The exception item itself should be a modifier type item with a zero price and have no output printer associated with it. The forms “O” or “A” should have this exception message added to it.

There are ten lines of header and footer information and three lines of exception messages that may print on the receipts and chits printed at this location.

Description	Expand	Center	
Line 1	WELCOME TO THE LOUNGE	N/Y/2	Y/N
Expand N	Regular printing		
Expand Y	Width is double		
Expand 2	Width and Height are both double		

**Items to print for server x readings:**

Sales summary	Y/N (Also on Tally)	Transfers	Y/N
Sales summary Full	Y/N (Also on Tally)	X-readings	Y/N
Discount summary	Y/N (Also on Tally)	Item moves	Y/N
Reason summary	Y/N (Also on Tally)	Tender moves	Y/N

Set bill summary	Y/N	(Also on Tally)	Manager sum full	Y/N
Refund summary	Y/N	(Also on Tally)	Manager overrides	Y/N
Rcvd on acct summary	Y/N	(Also on Tally)	Bill reprints	Y/N
Paid out summary	Y/N	(Also on Tally)	Open closed bills	Y/N
Customer bill summary	Y/N	(Also on Tally)	No sales	Y/N
Tax summary	Y/N	(Also on Tally)	Set prices	Y/N
Cancel		Y/N	Combine bills	Y/N
Corrections		Y/N	Split bills	Y/N

**Print or display confirmations for :**

Discounts	B/D/P/N	(Both, Display only, Print only, None)
VOIDS	B/D/P/N	
Transfers out	B/D/P/N	
Transfers in	B/D/P/N	
Combine bills	B/D/P/N	
Move items	B/D/P/N	
Move tenders	B/D/P/N	
Set prices	B/D/P/N	
Recall closed bills	B/D/P/N	
Paid outs	B/D/P/N	
Refunds	B/D/P/N	
Received on accounts	B/D/P/N	
Closed bills	B/D/P/N	
Split bills	B/D/P/N	

**Presentation of X-reading:**

Summary	Header line	Exp	Total description	Exp
Cash	Tender summary	N	TENDERS	Y
Sales	Sales summary	N	Sales	Y
Discount	Discount summary	N	Total	Y
Reason	Reason summary	N	Total	Y
Set bill	Set cust bill summary	N	Total	Y
Refund	Refund summary	N	Refunds	Y
Rcvd acct	ROA summary	N	ROAs	Y
Paid out	Paid out summary	N	Pd Outs	Y
Tax	Tax summary	N	Total	Y
Cust bill	Cust bill summary	N	Total	Y
Voids	Void summary	N	Voids	Y

**Appearance of receipt on the touch screen:**

On screen receipt: \*\*\*\*\*New items \*\*\*\*\* \*\*\*\*\* Sent items \*\*\*\*\*

	<u>Foreground</u>	<u>Background</u>	<u>Foreground</u>	<u>Background</u>
Panel color	White			
Normal items	Bright blue	White	Bright blue	Brown
Modifiers	Cyan	White	Bright Cyan	Brown
Tenders	White	Bright blue	White	Blue
Discounts	Black	Yellow	Yellow	Brown
Negative items	Black	Bright red	Bright red	Brown
Selected items	White	Green		

Use F1 to set all colors to the default values

Colors Available:

1 Black                      9 Dark Grey

2	Blue	10	Bright Blue
3	Green	11	Bright Green
4	Cyan	12	Bright Cyan
5	Red	13	Bright Red
6	Magenta	14	Bright Magenta
7	Brown	15	Yellow
8	Light Grey	16	White



## Chapter 5

### Forms

Go to MenuPoint, Setup, Forms. At time of installation, it is a good idea to use the load function to copy the standard forms provided by Samco Software. After checking the results, go to Forms, enter and make any changes that are necessary.

Form type	R/B/O/A/T/C	
Description	Receipt	
Sign format	L/T	(Leading, Trailing for negative sign)
Time format	1/2/A	(1=12 hour, 2=24 hour, A=AM/PM)
Add on taxes in summary	Y/N	
Add on tax prefix	Plus:	
Included tax prefix	Incl:	
Consolidate disc desc	Y/N	
Comment lines		
-----		
Blank lines before	0-9	
Blank lines after	0-9	
Center lines	Y/N	
Print in red	Y/N	

Print inverted Y/N  
Skip zero prc modifiers Y/N  
Blank zero prc modifiers Y/N  
Set red on negatives Y/N  
Set inverse on negatives Y/N  
Full year on date Y/N

Date format M/D/Y/A (M=MMDDYY, D=DDMMYY, Y=YYMMDD, A=Alpha)

The various form types are Receipt, Customer bill, Standard Output, Alternate Output, Totals Reports, Confirmation.

Depending on the type of form, you may now edit the following sections of each form.

Header lines

Footer lines

Quantity one detail lines

Multiple quantity detail lines

Quantity one modifier lines

Multiple quantity modifier lines

Guest header lines

Tender lines

Total lines

Tax summary line

Discount summary line

Tender value lines

Tender conversion lines

Tender header lines

When you edit the particular section, the form maintenance screen appears. The column data provides the appropriate escape codes to the printer for the section being printed.

Lin Adv	Enter number of blank lines before this line 0-9
Ctr Lin	Yes, to center this line
Exp Prt	Y=Expanded (Double wide), 2=Double Expanded (Double wide and high), N=Normal
Red Prt	Yes, to print line in red
Inv Prt	Yes, to print this line inversed
Field Format	ID field supports a “?” to display list of available fields. 0=literal entry
Description	Field description
Column	1-40 for standard receipts, this is relative to the column start in the printer device setup
Case	N=Normal, U=All Upper, L=All lower



## Chapter 6

### Tax Groups

In System Functions, Taxes, Tax Types, you will have already set up the various tax types that your enterprise charges.

In MenuPoint, Setup, Control File, you will have already set up the G/L accounts to be credited when these tax types are used at the point of sale.

In MenuPoint tax groups, you will set up the combination of taxes that are charged for various items. Each item belongs to a tax group; this is done in Items, F5 Loc/Price. Eg. You will have food items that attract provincial and federal sales taxes and are added on to the item price and liquor items that will have tax included

Go to MenuPoint, Setup, Tax Groups, enter.

Tax Group	FOD				
Description	Food Items (PST/GST)				
Tax Type	Percent	On-Amount-over	Tax-incl	Tax-on-Tax	
PST Prov Tax	7.5	0.00	N	N	
GST Goods & Svc	7.0	0.00	N	N	

Go to MenuPoint, Setup, Tax Groups, print.

You may print a listing of tax groups by group code.





## Chapter 7

### Tenders

#### Tender Codes

Go to MenuPoint, Setup, Tenders. Setup the various tender codes for the money and credit cards that you accept. A typical CASH setup would look like this....

Tender code	CASH	
Description	Cash	
Conversion Factor	1.00	(You would enter the exchange rate for USD if this was US CASH)
Account #	1010-000	(G/L Account)
Open drawer when used	Y	
Outside auth. Required	N	
Authorization program	N/A	
Button Label	Cash	
Button Color	Green	(? returns list of color selections)

When you have setup the tender codes, you must add them to the TENDERS list.

## List of Tender Codes

Go to MenuPoint, Setup, Lists, Enter. Setup a tenders list with all your tender codes from above. A typical tenders list would look like this:

List Code            TENDERS  
Description        Tenders  
Button Color       10 Bright Blue     (? returns list of color selections)  
Button Label       Tenders

<u>Seq</u>	<u>Code</u>	<u>Code</u>	<u>Description</u>
10	T	CASH	Cash
20	T	VISA	Visa
30	T	MC	MasterCard
40	T	AMEX	American Express
50	T	DEBIT	Debit Card
60	T	USD	U.S. Funds

### Add to screen layout

After you have added a tender, you may also add the individual tender buttons to the appropriate screen layout.



## Chapter 8

### Functions

Functions are hard coded into the MenuPoint program. You may only change the button label and color on a function button, not its usage.

Go to MenuPoint, Setup, Functions, enter. If this is the first time into the function screen, you may need to load all the functions, by pressing “F4 build all”. The function field supports a “?” to call a list of functions.

The functions, with the default label name and button colors, are:

<u>Function Description</u>	<u>Label</u>	<u>Button-Colour</u>
1 New Bill	New Bill	Green
2 Send Bill	Send Bill	Green
3 Recall Bill	Recall Bill	Green
4 Transfer Bill	Transfer	Green
5 Combine Bills	Combine	Green
6 Split Bills	Split	Green
7 Modify seats	Re-seat	Green
8 Set Table number	Table	Green
9 Set # of guests	Set # of guests	Green
10 Review new items	Review	Green
11 Recall Closed Bill	Recall	Red
12 Set price	Set price	Red
13 Move Item	Move Item	Bright blue
14 Move Tender	Move Tender	Bright blue
15 Print	Print	Green
16 View Recipe	View Recipe	Green
17 Main view	Main view	Green

<u>Function Description</u>	<u>Label</u>	<u>Button-Colour</u>
-----------------------------	--------------	----------------------

18	Add to bill	Add to bill	Green
19	View Journal	Journal	Green
20	Paid outs	Paid outs	Red
21	Recvd on account	R.O.A.	Red
22	Refunds	Refunds	Red
23	Cancel	Cancel	Red
24	Void Item	Void Item	Red
25	Server X-reading	Svr X-Rdg	Green
26	Repeat	Repeat	Green
27	Sign Off	Sign Off	Green
28	Receipt	Receipt	Green
29	No-sale	No-sale	Green
30	Lock Drawer	Lock	Green
31	Unlock drawer	Unlock	Green
32	Set Station info.	Stnt setup	Red
33	Purge printer data	Del PTR	Red
34	Enter Physical cnt	Count	Red
35	Search for closed bill	Look Up	Red
36	Station X-reading	Stn X-Rdg	Green
37	Cash drop complete	Cash Drop	Green



## Chapter 9

### Servers

#### Setup Servers

Go to MenuPoint, Setup, Servers, Enter.

Location	00	(00 is the default if you have only one location)	
Code	123	(Three digit unique number for each server)	
Name	Server's Name		
Short Name	Usually first name		
Security code	*****	(Six digit unique passcode for each server)	
Server status	Y/N		
Manager status	Y/N		
Cashier status	Y/N		
Disc security level	99		
Authority to perform:	(Enter Y beside each operation you want this server to perform)		
Recall closed bill	Y/N	Server X-reading	Y/N
Set price	Y/N	No-sale	Y/N

Move Item	Y/N	Set Station info	Y/N
Move Tender	Y/N	Purge printer data	Y/N
View Journal	Y/N	Enter Physical Count	Y/N
Paid outs	Y/N	Search for clsd bill	Y/N
Recvd on account	Y/N	Station X-reading	Y/N
Refunds	Y/N		
Void Item	Y/N		

### **Status for server, manager or cashier**

Server status set to “Y”, means that the person may sign in using their security code and enter bills. They may only recall the bills that belong to them. Depending on the authorizations that have been set to “Y” for this person, they may be able to do other functions.

Manager status set to “Y” allows the person to open all bills and perform any transaction on the bills. However, they may not close a bill that doesn’t belong to them. Usually their authorizations would be set to “Y” for everything.

Cashier status set to “Y” means that the person has access to all bills. The bill now belongs to the cashier and is the last step in the process. This is useful for those situations where there is one cashier and the servers notify the cashier that a bill in to be closed and paid.

### **Discount security level**

When a discount code is set up, it has a required security level; the higher the code, the higher the security level. For example, if a discount code for wrong order is setup with a security level required of 40, the server must have at least a Discount Security Level of 40 to be able to use this code at the touch screen. Security levels may be from one to 99; usually a manager would have a Discount Security Level of 99.

### **Servers List**

Go to MenuPoint, Setup, Servers, Print. You may print a list of servers here per location. The listing will print all the information on the server, except for the pass code.



## Chapter 10

### Sales and Price Categories

#### Sales Categories

Every item belongs to a sales category. These sales categories are used for determining what GL accounts are charged for both sales and expenses (cost of goods sold). It also is used to determine what printer will be used. For example, on a bill where there is both liquor and food, you will want to send the liquor items on a chit at the bartender's printer, while you send the food items on a chit to the kitchen. Later of course, all the items on the bill will be sent to the receipt printer to give to the patron.

When an item is setup, it must have a sales category. The printer and tax group on a new item defaults from the sales category but may be overridden.

You need to have General Ledger accounts, Tax Groups, Control File and printers set up before proceeding with this step.

Sales category	APT	(3 character code)
Description	Appetizers	(20 character field)
Sales Account	4000-000	(GL account for sales)
Expense Account	5000-000	(GL account for cost of sales/expense)

Default primary output	Kitchen	(? Returns a list of printer outputs from the control file)
Default secondary output	“None”	(If primary printer is down, use the printer specified here)
Default tax group	FOD	(? Returns a list of tax groups)
Priority	0-9	(Lowest priority, 0, means this category first printed on the chit)
Inventory type	4	(? Returns a list of inventory types from the control file)

### Price Categories

Every item belongs to a price category. These price categories are used for making quick price changes. For example, if you need to change the price for all domestic beer, this would be an appropriate category to setup here. It means that you do not have to go into each item for domestic beer, and change them individually. You would go to Items, Price by category and change by location, by sales and/or price category, and by price type.

Code	DOM	(3 character code)
Description	Domestic Beer	(20 character field)





## Chapter 11

### Category Prices

Go to MenuPoint, Setup, Category Prices, enter.

Sales location	00
Price category	BTL
Description	Bottle beer:Domestic
Price	5.00
Preferred margin	60.00

Go to MenuPoint, Setup, Category Prices, Print

You may print a listing of Category Prices by location or category code.



## Chapter 12

### Item Types

Item types are critical if you wish to automatically create items. If you have items setup for Coffee, Soda, Milk, and Juice and want to automatically create the various sizes, small, medium and large, this is a handy feature. The prefix and suffix are used to change the description from Coffee to Large Coffee.

Go to MenuPoint, Setup, Item types, enter.

Item type	L	
Description	Large	
Description prefix	Large	(This is added to the base item)
Description suffix		
Replacement prefix		
Replacement suffix		
Price category prefix		
Price category suffix		
Attach to item (modifier)	N	
Auto build item	Y	
Auto price by	M/F	(Multiplier or Fixed Amount)
Recipe multiplier	1-999.99	(For ingredients)

Price multiplier	.001-999.999 (When Multiplier)
Fixed price increase	.01-999.99 (When Fixed Amount)
Button label	LGE
Button color	5 Red

After setting up the Coffee item, you would press F2 to copy the Coffee item to a new type "L" and change the price if necessary. Then you would do the same for Soda, Milk and Juice.

On the touch screen, you would then add a button for each of Coffee, Soda, Milk, and Juice. On the same menu you would place the LGE button. The server then presses, LGE-Coffee, or LGE-Juice, etc. Do the same for MED size.

Go to MenuPoint, Setup, Item types, print.

You may print a listing of item types by code. The ? in the item type field returns a list of all item types already entered.



## Chapter 13

### Price Types

The price types may be used to determine special pricing rules. They are useful for the setup of a happy hour or breakfast specials, etc. You always need a One Time Price code to allow a manager to change a price at the touch screen, rather than having to go to the MenuPoint back office menu. In this way, a manager may change the price of an item from the touch screen at any time; this is a convenient way to put on specials. See Chapter 2 for this setup.

Go to MenuPoint , Setup, Price Types, enter. The following shows a setup for a lounge with a happy hour during the week from noon to 1:00 and again at 6:00pm to 7:00pm.

Price Type	HAP
Description	Happy Hour
Remove price at closing	Y
Always use this price	Y (If Y, stops looking for any more prices)
Starting Date	(F1 for “Earliest”)
Ending Date	(F1 for “Latest”)

	• Start time	End time	Start time	End time
Monday	12:00	13:00	18:00	19:00
Tuesday	12:00	13:00	18:00	19:00
Wednesday	12:00	13:00	18:00	19:00
Thursday	12:00	13:00	18:00	19:00
Friday	12:00	13:00	18:00	19:00
Saturday	0:00	0:00	0:00	0:00
Sunday	0:00	0:00	0:00	0:00



## Chapter 14

### Set Bill and Reasons

#### Set Bills

Set bills are items that are added to a bill but do not affect the cash. For example, a server uses his cash to buy cigarettes for a patron. Therefore the patron owes the server, but the server does not owe the bar. Sometimes these items are referred to as tab types. Set bills are useful for items like lottery tickets, cigarettes from a machine, pull tabs, etc.

Go to MenuPoint, Setup, Set bill types, enter.

Sales location	00
Set bill type code	CIG
Description	Cigarettes
Default amount	8.25

Go to MenuPoint, Setup, Set bill types, print.

You may print a list of Set Bill types by location or code. The ? in the Set Bill field returns a list of all Set Bills already entered.

#### Reasons

This is a list of reasons for changes to a bill. These reasons may be used for discounts from a bill and promotions. When discount or surcharge codes are setup, you must use one of these, if the code requires a reason.

Go to MenuPoint, Setup, Reasons, enter.

Code	Description
BIR	Birthday
SVC	Customer service
BRK	Broken glass
WRG	Wrong item

Go to MenuPoint, Setup, Reasons, print.

You may print a list of reasons by code. The ? in the Reason field returns a list of all reasons already entered.



## Chapter 15

### Discounts and Surcharges

Go to Menupoint, Setup, Discounts/Surcharges, enter.

Discount Code	DOL	
Description	Dollar off	
Account #	5055-00	(GL account or F2 for "None")
Allow all?	Y/N	(Y to be able to apply to all items on the bill)
Reason required?	Y/N	
Calc. Method	P/F/B	(Percentage, Fixed amt, Percentage of Bill)
Discount/Surcharge	D/S	(Discount or Surcharge)
Sec. Level req.	1-99	(Security level of user reqd to access this)
Item selection	I/L	(Use an item or select from a list)
(\$ ) off	\$/%	(Amount or percentage, F1 to "ask" user)
Item type	?	(Enter item type this code applies to)
Item code	?	(Or enter item code this discount applies to)
Edit reason table	Y/N	(If reason reqd=Y, you must enter a reason)



Button label	\$1/OFF	
Button color	Red	(? Returns list of colors available)
Avail on inventory types	Y/N	(All inventory types from control file)

If an “L” for list has been entered for Item selection, instead of item type you will be asked for the List ID. It will accept a blank, as you may have not yet set up the list, and will go back to this field later to enter it.

If the calculation method is B for Percentage of Bill, you must enter in an item that will contain the description for the line entry on the bill.

The dollar amount and percentage may be overridden at the touch screen by a user, if the F1 to “ask” feature is used in the amount/percentage field. This type of open discount would usually be restricted to a manager function and require a high security level.

Go to MenuPoint, Setup, Discounts/Surcharges, print.

You may print a listing of all Discounts/Surcharges by code in full or brief. Full gives all the information on the code, while brief is a list of codes with one line of information showing code, GL account, Type, All items?, Reason, Security level, Calculation and Selection method, Button Label and Color.



## Chapter 16

### Refunds, Paid Outs and ROA's

#### Refunds

Go to MenuPoint, Setup, Refunds, enter.

Sales Location	00	
Refund code	MCH	
Description	Money lost cig mach	
Default amount	8.25	
Account #	6030-00	(? Returns list of G/L accounts)
Tender List	"Cash only"	(Tender list of F1 for Cash only)

Go to MenuPoint, Setup, Refunds, print.

You may print a list of refunds by code or location. A ? in the code field returns a list of refunds already entered.

#### Paid Outs

This is for those purchases that are done at the till. For example, a server may have to pay out monies whenever certain supplies, like newspapers, are delivered.

Go to MenuPoint, Setup, Paid outs, enter.

Sales Location	00	
Paid out code	SUP	
Description	Supplies	
Default amount	0.00	
Account #	6090-00	(? Returns list of G/L accounts)
Tender List	“Cash only”	(Tender list of F1 for Cash only)

Go to MenuPoint, Setup, Paid outs, print.

You may print a list of Paid outs by code or location. A ? in the code field returns a list of paid out codes already entered.

### Received on Account

This is for monies received at the till that are not on a bill. It may be money collected by a server or a cashier for a donation fund, eg. Christmas food baskets.

Got to MenuPoint, Setup, Received on Account, enter.

Sales Location	00	
ROA code	DON	
Description	XMAS Food	
Default amount	0.00	
Account #	5005-00	(? Returns list of G/L accounts)
Tender List	TENDERS	(Tender list of F1 for Cash only)

Go to MenuPoint, Setup, Received on Account, print.

You may print a list of ROA's by code or location. A ? in the code field returns a list of ROA codes already entered.



## Chapter 17

### Printer Types and Devices

#### Printer types

Go to MenuPoint, Setup, Printer Types, Load. This will load the standard printer types supplied by Samco.

Go to MenuPoint, Setup, Printer Types, Enter. A “?” in the Printer Type field will give you a list of the printer types provided by Samco. Be sure that your various printers are represented in the list of supplied types.

#### Printer Devices

Go to MenuPoint, Setup, Printer Devices, Enter. The information about the actual printer is entered here,

Printer device	BAR	(Three character code)
Description	Lounge bar printer	(Identify location)
Station ID	_____	(Leave this blank at initial setup)
Printer type	CIT	Citizen 3540 (“?” returns list of printer types)
Prioritize output category of the item)	Y/N	(Y means to get priority from the sales
Output by seat	Y/N	
New form per line	Y/N	(Y means to split the bill into individual outputs

per line)

Left margin shift      1                      (F1 for “none”, or column number to start printing)

Fallback printer      “None”                      (If this printer is down, use the printer specified here)

If you want to send the items on a customer bill to the kitchen as separate bills, set “New form per line” to Yes. Eg. in a coffee bar, the barista wants to see each coffee with its modifiers as one chit. If there are three coffees on the bill, he will receive three separate chits. Then, the chit may go with the cup for the customer to pick up. In this way, the patron knows what is in each cup.

Left margin shift is needed for rolls that are not standard width. This will allow you to adjust the starting left margin to start at column one or two.

After the stations are set up, you will return to the printer device setup and enter the Station ID. Output printers that are not attached to a station, eg. Kitchen printer, do not need a Station ID.



Chapter 18

## Screen Layouts

For your MenuPoint installation, you will need to design the layouts for the touch screen. The simplest installation would only have one main menu that is used by everyone, and is active at all times. A hotel with several sales locations, lounge, restaurant, sports bar, etc., may have a different screen layout for each location and a different screen layout for certain times of the day.

Samco provides a simple screen layout that you may want to start with and change for your particular items. Or, you may start from scratch. It is best to make a number of photocopies of the template provided in the Appendix B to design your screens. The touch screen consists of three menu sections, Main, Side and Lower.

It is also best to standardize on your screen layouts eg. Main screen will have up to 26 buttons for items, modifiers and lists. Position the often used modifiers or recurring buttons, (LGE, for example) always in the same place on the main section. Reserve the side menu for those functions that are always needed (Main View, Receipt, Mgr Opt, Tab Opt, etc) and always leave it the same nine buttons. The lower menu is appropriate for the menu sub-sections , like Entrees, Pasta, Sandwiches, Soup, etc. It may have twelve buttons as a standard.

Go to MenuPoint, Setup, Screen layouts, enter.

Layout code	SVR
Description	Server
Default main screen	STR Main Start Up
Default side screen	STR Side Start Up
Default lower screen	STR Lower Start Up

Press F5 to edit the screens

The individual screens may now be entered or edited.

Type	M/S/L	(Main, Side or Lower menu)
Code	BEV	(3 characters)
Description	All Beverages	(20 characters)
Button label	Beverage	(9 characters)
Button color	10 Bright blue	

Edit buttons:

Type	I/F/L/T/Y/D/S	(Type of button, what does it call)
Item type		(Only if "I" above)
Code	162 Soda	(? Returns a listing)
Color	Default	

The type of button may be an Item, a Function, a List, a Tender, an item tYpe, a Discount/surcharge or another Screen.

Colors Available:

1	Black	9	Dark Grey
2	Blue	10	Bright Blue
3	Green	11	Bright Green
4	Cyan	12	Bright Cyan
5	Red	13	Bright Red
6	Magenta	14	Bright Magenta
7	Brown	15	Yellow
8	Light Grey	16	White

The F1 key is to edit another button on the screen. The remaining portion of this entry screen shows the placement of the buttons on the touch screen.

As soon as a screen layout is changed, the touch screen will reflect this change when the screen is next refreshed.





## Chapter 19

# Stations

A station is used to describe the Point of Sale touch screen with its receipt printer, cash drawer and screen layouts.

A MenuPoint installation may consist of a hotel with a kitchen and a number of serving rooms.

Hotel:            This is setup in System Functions, Company file

It has several sales locations with POS touch screen stations

Sales Locations:	Lounge	Two stations, both at bar
	Kitchen	Two stations
	Restaurant 1, Dinner	Two stations
	Restaurant 2, Breakfast & Lunch	One station
	Sports Bar	Three stations, two for servers, one at bar
	Snack Bar	One station

Go to MenuPoint, Setup, Stations, enter.

Code	LBAR1	(8 character code)
Description	Lounge bar 1	
Location	00 Lounge	
Layout	SVR Server	(? Returns list of layouts)
Auto sign off time entry)	0-9999 sec	(Return touch screen to sign on, with no entry)

Receipt printer	?	(? Returns list of printer devices)
Cash drawer device	“Not used”	
Scale port #		
Read scale command		
Open drawer 1 codes	“none”	(Escape codes for open cash drawer)
Open drawer 2 codes	“none”	(Escape codes for second drawer)

Time	Main Layout	Side Layout	Lower Layout
06:00	BRK Breakfast	SVR Server	BEV Beverages
11:00	ENT Entrees	SVR Server	LUN Lunch

Scale Baud

Scale Parity

Scale Bits

Scale IRQ

Scale Address

Enter output printers (List of output printers, control file)

Enter locations (Locations for inventory types)

The second screen of the station file contains information about the cash drop and the logo image that appears on the start screen.

Cash drop cutoff 1-999,999 (Limit for operator to be warned to drop cash)

Cash drop amount 1-999,999 (Amount of cash drop)

Cash drop message 75 characters

Seconds before reminder drop 1 - 999 (If user answers “Remind me later” to cash drop message)

Logo image filename be JPG or BMP)		(Image file for the sign on screen, must be JPG or BMP)
Logo start row screen, starting row )	3	(Placement of logo window on sign in screen, starting row )
Logo start column starting column)	70	(Placement of logo on sign in screen, starting column)
Hide mouse cursor on back office station)	Y/N	(Hide mouse on touch screens, but not on back office station)

Cash drawer device may be the local cash drawer attached to the touch screen, F1 for Off the receipt printer, or F2 for “Not used”

Scale information if for those installations where there is a scale to do the liquor inventory. The local scale data must be entered for all the scale fields.

A station may keep two cash drawers, one for Canadian dollars, one for USA dollars.

A station in a restaurant may use different menus depending on the time of day. Here, the breakfast menu starts at 6:00 am and the lunch menu starts at 11:00 am.

Go to MenuPoint, Setup, Stations, print.

You may print a listing of stations by station code, in full or brief. A full listing gives all the information about a station, while the brief listing provides a short list with Station code, description, screen layout, receipt printer, cash drawer and scale data



## Chapter 20

### Lists

Go to MenuPoint, Setup, Lists, enter.

List code	DRESS
Description	Dressings
Button Color	10 Bright blue
Button Label	Dressg
Seq	10 (Order in the list)
Code Type	I/F/L/T/Y/D
Item type	M Modifier
Code	130
Description	Ranch

Code types are Item, Function, another List, Tenders, Y for Item type, Discount

If code type is Item, the ? in the code field returns a list of item codes. You may also enter an item type.

If code type is Function, the ? in the code field returns a list of functions.

If code type is List, the ? in the code field returns a list of all other lists already entered.

If code type is Tender, the ? in the code field returns a list of all the tenders.

If code type is Y for Item type, the ? in the coded field returns all the item types.

If code type is Discounts, the ? in the code field returns all the discount/surcharges.

When an item is setup there is field for “forced lists”. Forced list means that a list will appear every time an item is entered on the touch screen. If you want the list to stay on the screen, make sure that the items on the list (usually modifiers) have an entry in the forced list field. Eg. an item M-100 for Modifier, Item 100, “With Fries”, should have SIDESEL (the Side Selections list it is a member of) in its forced list field. This way, whenever an entree is entered that has SIDESEL as a forced list, when “With Fries” is touched, the list stays on the screen. The server may then choose another selection on the list, “With green salad”. The server presses EXIT when they are finished with the list.

If you want the list to appear, have the operator make a selection and then have the list immediately disappear, only the main menu item has a forced list. The items that are selections on the list do not have the same forced list in the item setup.

Go to MenuPoint, Setup, Lists, print.

You may print a report of all lists, in full detail by code.



## Chapter 21

### Items

Go to MenuPoint, Items, enter.

Item type	(Normal)	(Press enter for “Normal”)
Item code	KOK1000	(12 character alphanumeric field)
Description	Kokanee Off Sales - 12 Pak	
Sales category	OFF	
Price category	PBR Pack Beer	
Negative item	N	
Allow move on tabs	Y	
Overhead cost	0.00	
Linked type	M Modifier	(May be blank)
Linked item	1000	(May be blank)
	Deposit	
Open price ? screen)	Y/N	(Y if server is required to enter price at touch
Type required ?	Y/N	(Y if the item always has a size)

Button color	4 Cyan	
Button label	KOK OFF	
Forced lists		(Up to five lists attached)
Comment 1	“Deposit required”	
Comment 1 to print?	Y/N	(Whether comment is to print on receipt)
Comment 2		
Comment 2 to print?	Y/N	

Press F2 to create a new item with a different item type. For example, if you have an item 200, “Green Salad” as a menu item selling for \$5.95, you may want to create item M-200 for Modifier-Green Salad, with a price of 0.00 and add this to a list of side selections.

Another way to use the item type to modify an item is to set up an item 300 “Coffee”, item types “Large” and “Medium”, and create the different sizes by entering Large, 300. All that may be necessary is to then change the item price appropriately.

If an item always has a type associated with it, e.g. Small, Medium, Large Drink, set the “Type required?” to Yes for the “Normal” Drink. You may then use the “Normal” Drink item as a button on the touch screen, and have three buttons for the various sizes. By forcing a type to be required, the server must press a size button first; a “Normal” Drink will prompt that the item is not available.

Forced lists means that a list will appear every time this button is entered on the touch screen. If you want the list to stay on the screen, make sure that the items on the list (usually modifiers) have an entry in the forced list field. Eg. an item M-100 for Modifier, Item 100, With Fries, should have SIDESEL (the Side Selections list it is a member of) in its forced list field. This way, whenever an entree is entered that has SIDESEL as a forced list, when “With Fries” is touched, the list stays on the screen. The server may then choose another selection on the list, “With green salad”. The server presses EXIT when they are finished with the list.

If you want the list to appear, have the operator make a selection and then have the list immediately disappear, only the main item has a forced list. The items that are selections on the list do not have the same forced list in the item setup.

Press F4 to add a recipe for this item code. You must have the Inventory module. The ingredients are inventory items in the Inventory module; quantity is the amount

required for one serving of this item code.

Press F5 to assign the locations where this item code is served, the printers that this item is sent to and whether to use the standard or alternate form, and the tax group. For example, when an item is entered on a ticket that requires kitchen preparation, the “Send bill” function will send a chit to the kitchen printer. Pressing F5 again allows the entry of the price.

Go to MenuPoint, Items, print.

An item code listing may be printed by item type, item coded, sales and/or price category. The list may be sorted by Item code, description or type.

### Price by category

Go to MenuPoint, Items, Price by category.

This function allows you to change prices quickly for a large number of items. You may use the following to group your items for global price changes; in this example you are changing for the Main Lounge, the price on all domestic bottled beer.

Location	00	Main Location
Sales category	BTL	Bottled beer
Price category	DOM	Domestic
Price type	Retail	(F1 for “Retail”, or ? to return price types)
Price	4.50	(New price)

### Individual Pricing

You may change prices here for one item at a time. You may also change prices in the Items, enter screen, but this function is a shortcut.

Go to MenuPoint, Items, Individual Pricing.

Enter the item type (if applicable), the item code and press F5 to change the retail price or any other price type that has been set up for this item.

Item type	JUG
Item code	300
Description	Jug of draft



Price-type	Price
-----	
Retail	12.95
HAP Happy Hour	10.00

### Convert a Price Type to Retail

This feature is useful to set up any price changes ahead of time. When the price change takes effect, this conversion will change all items of this price type to the new retail price.

Go to MenuPoint, Item, Convert a price type to retail

Price type    NEW

Location     00 Main Lounge



## Chapter 22

### Reports

#### Price Change Log

This will print a report of all price changes that have been made in date or item order. It will show the date, time, user, item code and description, location, function that made the change, new price and old price.

- Starting date (F1 for “Earliest”)
- Ending date (F1 for “Latest”)
- Sales location (F1 for “All”)
- Price type (F1 for “All”)
- Report Order (Date or Item code order)

#### G/L Distribution

This report shows all the transactions for a date range in G/L account order. If you have the General Ledger module, these transactions will be interfaced to the G/L at “Get distributions”.

- Starting account (F1 for “First”)

Ending account	(F1 for “Last”)
Starting date	(F1 for “Earliest”)
Ending date	(F1 for “Latest”)
Purge file	Y/N

If you have the G/L module, you would normally never purge here; you would purge in the G/L module after getting the distributions. If you don't have the G/L, you would always want to have printed a hard copy of this report before purging.

### Price List

You may use this function to print a price list

Starting sales category	(F1 for “First”)
Ending sales category	(F1 for “Last”)
Starting price category	(F1 for “First”)
Ending price category	(F1 for “Last”)
Location	(Each location is printed separately)
All prices	Y
Show cost data?	Y/N
Omit zero prices?	Y/N
Only margin var. of	N/A
Remove taxes from prices	Y/N
Primary Sort	C/P/N (By sales category, by price category, or none)
Secondary Sort	I/D/T (By item code, by item description, by item type)

If No to All prices, you will be able to print only those with a margin variation of an entered amount.

### Recipe List

If you have the Inventory Control module with MenuPoint, you may add recipes to an item code. This listing will show the items with their ingredients, quantities, costs and margins.

Starting sales category	(F1 for "First")
Ending sales category	(F1 for "Last")
Location	(Each location is printed separately)
Show cost data?	Y/N
Omit no recipe items?	Y/N
Only with ingredients?	? (? Returns inventory codes, F1 for "All")
Sort by	C/I/D/T

The recipe list may be sorted by sales category, by item code, by description or by item type.

### Transactions

This report will provide the transaction detail for every bill. It shows the date, time, server, table, guest, quantity, item code or type, price and tender for each bill.

Starting date	(F1 for "Earliest", F2 for "Current", unposted transactions)
Ending date	(F1 for "Latest")
Location	(Each location is printed separately)
Starting sales category	(F1 for "First")
Ending sales category	(F1 for "Last")
Starting hour	(Only if single date chosen)
Server	(F1 for "All")
Omit misc trans?	Y/N
Group by bill?	Y/N

Only the following items:

Type	Code	Description	(F1 for all types, F2 for all items)
------	------	-------------	--------------------------------------

## Sales by category

This report will show the data for sales categories. It reports on the gross sales, discounts, net sales, after-tax sales and margins.

Starting date	(F1 for “Earliest”)
Ending date	(F1 for “Latest”)
Starting sales category	(F1 for “First”)
Ending sales category	(F1 for “Last”)
Location	(Each location is printed separately)
Include costs?	Y/N
Totals only?	Y/N (Use Y if you only want a summary report)
Sort by	I/D/T/Q/S

This sales report may be sorted by item code, description, item type, quantity sold, sales amount.

## Comparative Sales

This report will show the comparative data for two date ranges. The differences are shown by percentage, dollar amount and quantities.

Starting date	(F1 for “Earliest”)
Ending date	(F1 for “Latest”)
Starting comp. date	(F1 for “Earliest”)
Ending comp. date	(F1 for “Latest”)
Starting sales category	(F1 for “First”)
Ending sales category	(F1 for “Last”)
Location	(F1 for “All”)

Totals only?                      Y/N    (Use Y if you only want a summary report)

Sort by                              I/D/T/Q/S

This sales report may be sorted by item code, description, item type, quantity sold, sales amount.

### **Discount Analysis**

For a date range and a location, you may print a report showing the discounts/reasons with quantities and amounts.

Report Type D                      (Discounts, Reasons)

Starting date                      (F1 for "Earliest")

Ending date                        (F1 for "Latest")

Starting discount                (F1 for "First")

Ending discount                 (F1 for "Last")

Location                          (F1 for "All")

Item detail?                      Y/N

Answer Yes for Item detail if you need the breakdown for each discount/reason by item.

### **Server Sales**

This report gives all the summaries of sales, tenders, customer bills, refunds, discounts, voids, received on accounts, etc for each server.

Location                          (Each location is printed separately)

Starting date                      (F1 for "Earliest")

Ending date                        (F1 for "Latest")

### **Server Sales by Item**

This report shows server sales by item or sales category with the quantities and amounts.

Location (Each location is printed separately)

Starting date (F1 for “Earliest”)

Ending date (F1 for “Latest”)

Report by I/C (By Item or Sales category)

If the report is by item, you may enter up to 5 item types and codes. If the report is by sales category, you may enter up to 5 sales categories.

### Hourly Report

This report shows sales by date, sales category, inventory type; the sub-totals are grouped by hours

Starting date (F1 for “Earliest”)

Ending date (F1 for “Latest”)

Starting sales category (F1 for “First”)

Ending sales category (F1 for “Last”)

Starting inv. type 1-9 (Inventory types from control file)

Ending inv. type 1-9 (F1 for “Last”)

Location (Each location is printed separately)

Server (F1 for “All”, ? returns list of servers)

Report by I/C/D/S/A

The report may be sorted by inventory type, sales category, day of the week, server, or all i.e. no breakdown, hourly totals only.



## Appendix A:

### File Utilities

This function will allow you to:

- Recover the data files that have become corrupted (fouled up).
- Recover disk space by rebuilding data files with purged or deleted records that are still taking up space.
- Export your data into a format that can be used by many popular spreadsheet, word processing and data base programs.

#### Corrupted data files

Data file corruption does not occur very often, but you do need to be aware of it just in case one of your data files does become corrupted. This can occur for only a handful of reasons. The most common being:

The power to your computer gets turned off when you are using your Samco applications.

Your hard disk has developed a defect.

Corrupted data files can't be used reliably afterward, and any attempt to use them causes unusual error messages and you are removed from running the Samco applications.

If this occurs, or if you begin to get unusual results while using your software and



suspect that there may be a corrupted data file, you should get technical support.

Your supplier or an independent professional may be able to provide this support. If not, contact Samco Software Inc.'s support department directly (there may be a fee). Samco's Help Desk is 604-597-1599.

### Handling

Data file corruption does not mean that all of the data in the file is no longer usable. Usually, just a few of the records in the file have become corrupted.

In File Utilities, the function Rebuild a file will take out the good records in the data file, place these in a temporary file, and then replace the old file with the good records. In addition to this, any deleted or purged records which are taking up disk space will also be permanently removed and the file compressed to its physical size.

### To Begin

Select File Utilities from the second page of the Scheduler main menu.

### Convert A File

Convert a file function is used to export data files from the internal format to a "flat" ASCII file. The data file(s) is read in and an output file is created in the Samco root directory with the name "xxxxxxnn.EXP"; where 'xxxxxx' is the file name, and where 'nn' is the company number the file came from. (If you are running under Unix you will also have the option of appending a drive designation to the front of the file.)

To begin, select Convert a file from the File utilities sub-menu. Please select file (Where Company # is XX)

- |   |                             |
|---|-----------------------------|
| 1. M/P bill header file (MPTRKHXX)<br>(MPPCATXX)    | 18. M/P Price category file |
| 2. M/P bill detail file (MPTRKDXX)<br>MPPRCLXX)     | 19. M/P Price change        |
| 3. M/P clsd bill hdr file (MPCLSHXX)<br>(MPPRINXX)  | 20. M/P Printer control     |
| 4. M/P clsd bill hdr file (MPCLSHXX)1<br>(MPPTRSXX) | 21. M/P Printer status      |
| 5. M/P codes file ..... (MPCODSXX)<br>(MPIRECXX)    | 22. M/P Recipes file .....  |
| 6. M/P Control file ..... (MPCTLFXX)<br>(MPLAYHXX)  | 23. M/P Screen layouts file |
| 7. M/P forms file ..... (MPFRMFXX)<br>(MPLAYDXX)    | 24. M/P Screens file .....  |

- |  |            |                                       |
|--|------------|---------------------------------------|
| 8. M/P Functions file ....<br>(MPFNCFFX) | (MPFNCFFX) | 25. M/P Servers file .....            |
| 9. M/P GL dist. file .....               | (MPDISTXX) | 26. M/P Servers aux.....              |
| 10. M/P ingredients<br>(MPINGFFX)        | (MPINGFFX) | 27. M/P Server history...             |
| 11. M/P item file .....                  | (MPITEMXX) | 28. M/P Stations....                  |
| 12. M/P Item location<br>(MPILOCXX)      | (MPILOCXX) | 29. M/P Station aux.....              |
| 13. M/P Item prices file ..              | (MPIPRCXX) | 30. M/P Station history... (MPNHISXX) |
| 14. M/P Item sales file ..               | (MPISLSXX) | 31. Tax group.....                    |
| 15. M/P linked list.....                 | (MPLISTXX) | 32. M/P Transaction...                |
| 16. M/P Location....                     | (MPCTLLXX) | 33. M/P Trans history.... (MPTHISXX)  |
| 17. M/P Lock file...                     | (MPLOCKXX) | 34. Tax file....                      |

Enter the number, from the list provided, of the file to be converted to ASCII format, or use one of the options:

Options:            F1    To export "All" files.

Please enter device for converted file

Enter the drive letter of the device that the ASCII version of the data file will be written to, or use the option:

Option:            F1    If you either (a) do not want to append a drive letter prefix to the file name (Unix only), or (b) want the file created on your hard drive.

### For Linux users

The drive letter entered here will be attached to the front of the file name. The letter A is recommended for consistency. The ASCII backup file name in the Samco root directory will read A:xxxxxnn.EXP.

Alternatively, if you do not want to add a drive letter, press F1 for "none".

### **For Windows network users**

The drive letter enter here will be the drive that the ASCII backup file will be written onto. If the drive letter entered is that of a floppy disk drive you will be prompted if you wish to delete all files on the drive first.

Please enter the device size in kilobytes

Enter the size of the disk the ASCII files are to be written to.

If you enter a specific device size, once the disk is filled you will then be asked for another disk. This process will be repeated until all the data is written to the disk.

The screen will then prompt you "Any change?". Enter y and all the entries that you have made will be cleared and you will be returned to the "Please select file" prompt. Press ENTER to accept the default of N.

NOTE: If you choose to convert "All" files, the screen will move immediately into displaying the file and record being backed up. It skips past the "(C) CREATE NEW CONVERTED FILE OR (A) ADD RECORDS TO EXISTING CONVERTED FILE", "STARTING FILE KEY", and "ENDING FILE KEY" prompts

The following will be displayed only if you did not select "All" files at the "Please select file" prompt or the file allows for a key range:

Enter the following data:

1. Starting file key
2. Ending file key

Enter the starting and ending file keys for the data file selected for conversion, or press for "First" and "Last". Up to 37 alphanumeric characters may be entered. Unless you know the exact key for the records in the data file it is recommended that you press .

When you have completed all entries the following prompt will appear:

(C) create new export file or (A) add records to existing export file

Enter to create a new export file and over-write any pre-existing ASCII export for this data file, or enter to add the records selected for conversion to any pre-existing ASCII export file on the device specified.

After selecting which type of file to create the screen then clears and the ASCII file name is displayed along with a counter of the number of records exported.

If you had selected "All" at the "Please select file", it is assumed that you wish to create a new converted file. After the "Any change?" prompt, the screen clears and the ASCII file name is displayed along with a counter of the number of records exported for all files.

The Convert a File menu reappears after the file(s) selected has been exported so that you may choose another file.

After you have completed running the convert routine, press TAB at the "Please select file" prompt. A window will appear for you to select how to print the export log.

### **Restore a file**

This function is used to restore one or more of the listed data files from the "flat" ASCII file format to the internal format. The exported file is read in and an output file is created in the company sub-directory with the name "xxxxxx.DAT". Where "xxxxxx" is the file name.

From the File utilities menu select Restore an exported file. Enter the following information for either active or inactive files:

Please select file

Enter the file number, from the list provided, of the file to be restored from an ASCII export format, or use the option:

Option:      F1      to restore "All" exported files.

Please enter device for exported file

Enter the drive letter of the device that the ASCII version of the data file will be read from, or use the option:

Option:      F1      If you either (a) did not append a drive letter prefix to the file name (Unix only), or (b) the file(s) reside on your computer's default hard drive.

### **For Linux users**

This is the drive letter attached to the front of the file name. For example, if the file to restore is A:xxxxxxnn.EXP, you would enter  here. If no designation is at the beginning of the file press F1 for "none" For LAN network users

The drive letter entered here will be the drive that the ASCII export file resides on.

Please enter the device size in kilobytes

Enter the size of the disk the ASCII export files are on.

(C) Create New Data File Or (A) Add Records To existing Data File

Enter the following information for either active or inactive files:

Please select file

Enter the file number, from the list provided, of the file to be restored from an ASCII export format, or use the option:

Option: F1 to restore "All" exported files.

Please enter device for exported file

Enter the drive letter of the device that the ASCII version of the data file will be read from, or use the option:

Option: F1 If you either (a) did not append a drive letter prefix to the file name (Unix only), or (b) the file(s) reside on your computer's default hard drive.

#### **For Linux users**

This is the drive letter attached to the front of the file name. For example, if the file to restore is A:xxxxxnn.EXP, you would enter A here. If no designation is at the beginning of the file press F1 for "none".

#### **For Windows network users**

The drive letter entered here will be the drive that the ASCII export file resides on.

Please enter the device size in kilobytes

Enter the size of the disk the ASCII export files are on.

(C) Create New Data File Or (A) Add Records To existing Data File

When the restoration of the file or files is complete the 'Restore a converted file' menu will be displayed.

You may select another file to restore. You may continue to restore files or press TAB to print the restore log and then return to the File Utilities sub-menu. A window will appear for you to select where to print the restore log. A restore log shows the file(s)

restored, the number of records per file, the date and time.

### **Rebuilding Data Files**

Rebuilding data files can be used for one of two reasons:

A data file has become corrupted and needs to be recovered.

To recover disk space and clean out deleted or purged records.

The Rebuild a File function essentially takes the good records out of a file, removes the old file, and creates a new file with the good records.

To begin, select Rebuild a file from the File Utilities menu. Please select the file you wish to rebuild. Enter the number of the file you wish to rebuild, or use the option:

Option:        F1        to rebuild "All" of the data files.

A new screen will appear showing the status of each file as it is being rebuilt. Once completed, you are returned to the Rebuild a file screen.

### **Purge Price Change Log**

Under MenuPoint, Reports, there is a price change log that shows the any price changes that have been made. It may be in date or item order and shows the details of who made the changes, when they were made, type of change, etc. After this report has been examined you may want to purge it.

Go to MenuPoint, File Utilities, Purge Price Change Log, you will be asked for the date:

Purge log entries before: (Enter date)

### **Purge transaction history**

Under MenuPoint, Reports, there is a transaction history report that shows the details of all transactions for every bill. After this report has been printed or reviewed, you may want to purge this history.

Go to MenuPoint, File Utilities, Purge Transaction History, you will be asked for the date:

Purge log entries before: (Enter date)

## **Initialize Printer/lock files**

If there is a problem at the touch screen, this utility allows you to initialize certain files from the back office.

Go to MenuPoint, File Utilities, Init Printer / Lock files. The files are:

M/P Lock file

M/P Drawer lock file

M/P Printer control

M/P Printer status

## **Shut down all pos screens**

If there is a problem at the touch screen, this utility allows you shut down all the touch screens from the back office.

Go to MenuPoint, File Utilities, Shut down all POS screens



## Appendix B

### INSTALLATION CHECKLIST

Install the software per Install instructions. This provides you with the Samco MenuPoint back office features

In C:\SSI, at the individual point of sale stations, run touch.bat. Place the touch screen and printer control programs in the start menu. This will give you the touch screen and printer setup automatically when the station is turned on.

Module	Function	Comment
SF	Company File	
SF	Tax Types	
SF	Valid GL accounts	
MP, Setup	Price Type - Onetime	
	Tender Codes	
	Lists, Tenders	
	Printer types	Supplied by Samco
	Printer devices	Leave station field blank for now
	Control File	
	Sales Location	



Forms	Load standard forms and change
Tax Groups	
Tenders	
Functions	F4 to build
Servers	
Sales categories	
Price categories (opt)	
Category prices (opt)	
Item types	Incl modifiers needed for item setup
Price types	
Set bill types	
Reasons	
Refunds	
Paid Outs	
Received on account	
Items	
Lists	
Discounts/Surcharges	
Screen layouts	Load optional
Stations	Return to printer devices and add correct station

Any changes to the screen layouts will be recognized at the touch screen, the next time someone refreshes the MenuPoint at the POS station.

### Hints on Screen Layouts

After the back office is set up, do all menu items, lists and modifiers before attempting screens.

Reserve the side menu for those functions that you always need. MAIN VIEW, RECEIPT, REPEAT, SIGN OFF. This takes nine buttons as standard. Be sure to include the Main View function in the side screen. This function takes the user back to the start up menu.

Lower menu should be the menu sub-sections - takes twelve buttons as standard

Main menu = items and modifiers and appropriate lists OR functions for the supervisor's menu - takes 28 buttons as standard