



# USER MANUAL

Front of House · Back Office · Fingerprint Management  
Seating Chart Designer · Remote Display





# AmigoPOS 8

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Part 1

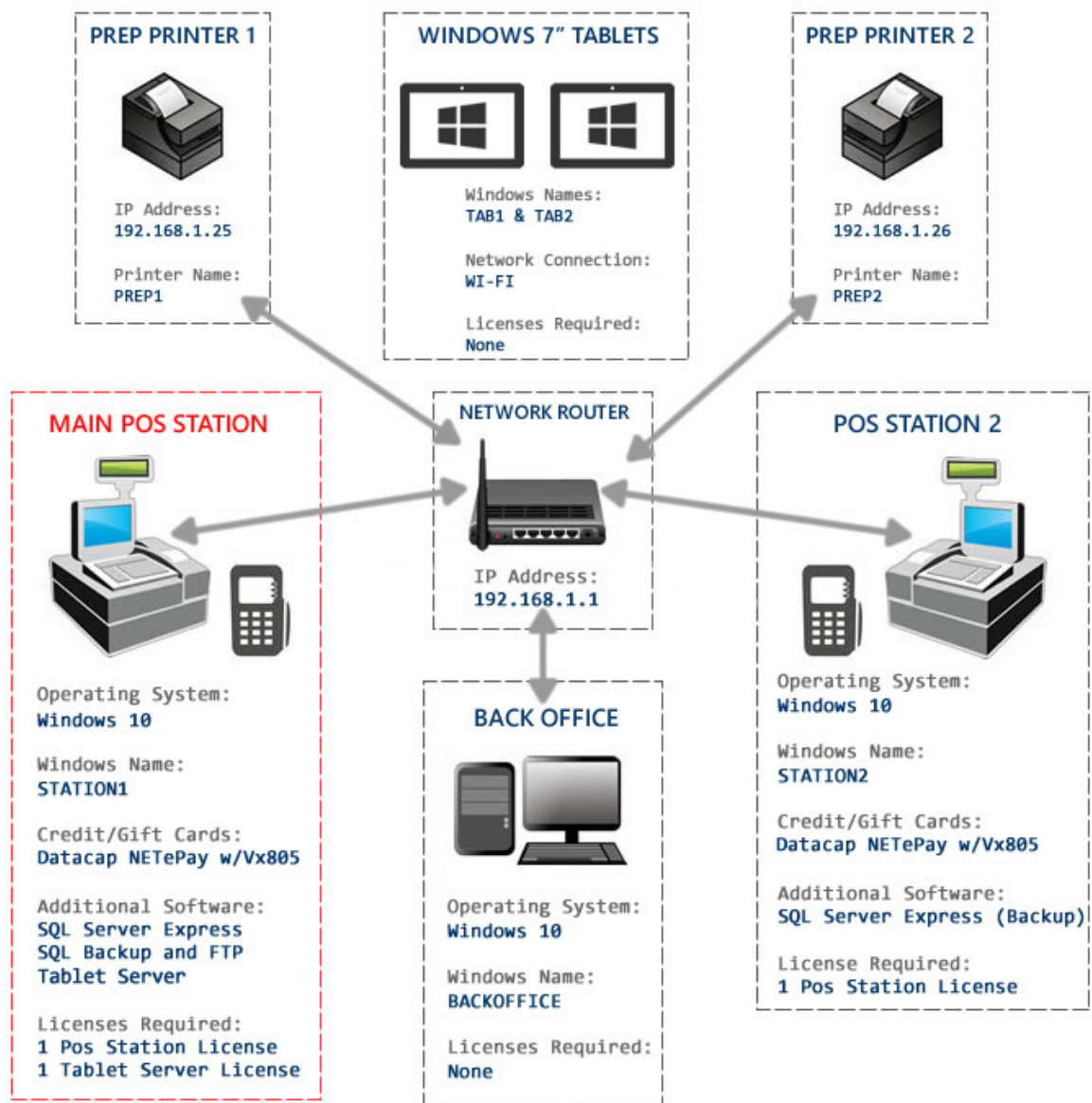
# Quick Start

# 1 Quick Start

This topic describes the installation and setup of a typical pos system consisting of two pos stations and one back office workstation, all running Windows 8.1 64-bit. The instructions are virtually identical for Windows 7, 8 and 10 (32- and 64-bit). The estimated time to complete the following steps is 1.5-3 hours.

Verify that all devices except tablets are connected to the network router with a Cat6 Ethernet cable.

- If an internet connection is available, download the small AmigoPOS installer for faster installation.
- If an internet connection is not available, download and install the prerequisites at both pos stations and back office workstation. Reboot after installing the prerequisites. Then download the full installer that contains the SQL Server Express installer for the main pos station. The small installer can still be used for pos station 2 and back office.



Typical 2-Station System

**Step One: Main Pos Station**

1. Power on the main pos station. Power-off pos station 2, power-off the back office workstation and power-off both prep printers.
2. Open Windows Control Panel > HomeGroup
  - [Create a new Windows HomeGroup](#)<sup>[83]</sup> if one is not already active.
  - Disable HomeGroup Printer Sharing (receipt printer and both prep printers will be installed at each pos station later).
  - Note the HomeGroup password or print it for later use.
3. Verify that an internet connection is available and run Windows Update on the main pos station.
4. Reboot the main pos station.
5. Install AmigoPOS 8 on the main pos station using the default settings to instance a new database server instance and create a new database. The help file is not required as it will be installed on the back office workstation in Step 3.
6. Wait for the installation to complete and reboot the main pos station when prompted.
7. Double-click the POS icon in the desktop shortcuts folder.
8. Create a new database. Use an appropriate database name for easy identification, i.e. **MyRestaurantName**.
9. Verify that a new order can be submitted and recalled.
10. Note that the main pos station must be running before attempting to open AmigoPOS on pos station 2 or the back office computer.

**Step Two: Pos Station 2**

1. Verify that the main pos station is running. Power on pos station 2.
2. Open **Windows Control Panel > HomeGroup** on pos station 2. Join the Windows HomeGroup using the password from Step One.
3. Run Windows Update on pos station 2.
4. Reboot pos station 2.
5. Double-click on Desktop > Network icon and verify that STATION1 appears on the list. If not, check the HomeGroup settings on both the main pos station and pos station 2.
6. Install AmigoPOS 8 on pos station 2. On the database selection screen, select "The Database is located on another station". Check the box to install SQL Native Client 2012. The help file is not required as it will be installed on the back office workstation in Step 3.
7. Wait for the installation to complete and reboot pos station 2 when prompted.
8. Double-click the Database Configuration Utility icon in the desktop shortcuts folder on pos station 2.
9. On the main pos station, open **Back Office>Settings>Database Settings** and enter the same settings in the Database Configuration Utility on pos station 2. Click Save and close the Database Configuration Utility.
10. Double-click the POS icon in the desktop shortcuts folder and verify that AmigoPOS can connect to the database server. If not, refer to the SQL Server Connection Error Troubleshooting help topic.

**Step Three: Back Office Workstation**

1. Verify that the main pos station is running. Power on pos station 2 and the back office workstation.
2. Open **Windows Control Panel > HomeGroup** on the back office workstation. Join the Windows HomeGroup using the password from Step One.
3. Run Windows Update on the back office workstation.
4. Reboot the back office workstation.
5. Double-click on Desktop > Network icon and verify that both STATION1 and STATION2 appear on the list. If not, check the HomeGroup settings on both the main pos station and the back office workstation.
6. Install AmigoPOS 8 on the back office workstation. On the database selection screen, select "The Database is located on another station". Check the box to install SQL Native Client 2012. Check the box to install the help file.
7. Wait for the installation to complete and reboot the back office workstation when prompted.
8. Double-click the Database Configuration Utility icon in the desktop shortcuts folder on the back office workstation.
9. On the main pos station, open **Back Office>Settings>Database Settings** and enter the same settings in the Database Configuration Utility on the back office workstation. Click Save and close the Database Configuration Utility.
10. Double-click the back office icon in the desktop shortcuts folder and verify that back office can connect to the database server. If not, refer to the SQL Server Connection Error Troubleshooting help topic. Delete the POS icon from the desktop and Windows start menu, since the back office workstation is not used to enter orders.

**Step Four: Kitchen Printer 1**

Most pos impact printers are available with an integrated print server and come with instructions to set a static IP address. For example, the Epson TM-U220 impact printer is supplied with the Epson TMNet utility that will connect to the print server on the LAN and allow you to change the IP address.

1. Open a web browser and navigate to 192.168.1.1 (or your router's IP address) to view the router's DHCP client list.
2. Using the Epson TMNet utility, change the printer's IP address to any unused IP address within the range and reserve the IP address so that it is not reset if the router is powered off.
3. Refresh the DHCP client list and verify that the printer appears on the list.
4. At the main pos station, open **Windows Control Panel > Devices and Printers**. Select Add New Printer and follow the instructions to add a new TCP/IP printer port and install the printer with printer name PREP1 using the Generic/Text Only driver.
5. Double-click the back office icon in the desktop shortcuts folder and navigate to **Back Office>Settings>Peripherals>Prep Printer 1**. Select PREP1 from the drop-down list. Print a test page to verify that Windows can communicate with the printer.

#### Step Four: Kitchen Printer 2

1. Open a web browser and navigate to 192.168.1.1 (or your network router's IP address) to view the router's DHCP client list.
2. Using the Epson TMNet utility, change the printer's IP address to any unused IP address within the range and reserve the IP address so that it is not reset if the router is powered off.
3. Refresh the DHCP client list and verify that the printer appears on the list.
4. At the main pos station, open **Windows Control Panel > Devices and Printers**. Select Add New Printer and follow the instructions to add a new TCP/IP printer port and install the printer with printer name PREP1 using the Generic/Text Only driver.
5. Double-click the back office icon in the desktop shortcuts folder and navigate to **Back Office>Settings>Peripherals>Prep Printer 1**. Select PREP1 from the drop-down list. Print a test page to verify that Windows can communicate with the printer.

#### Step 5: Install Receipt Printers

- Install the receipt printers at the main pos station and pos station 2 as per the instructions.

#### Step 6: Install Magnetic Card Readers

- Install the magnetic card readers at the main pos station and pos station 2 as per the instructions.

#### Step 7: Configure Credit Card Processing

- Configure back office for Verifone Point credit card processing at the main pos station and pos station 2 as per the [instructions](#)

#### Step 8: Install remaining devices

- Install any remaining devices such as barcode scanner, customer display or scale.

Part 2

# Introduction

## 2 Introduction

### 2.1 Welcome



View the online version of this help file at [amigopos.com](http://amigopos.com)

Welcome to AmigoPOS. This application is intended for food service and light retail environments where ease-of-use and reliability are required.

Typical uses include:

- Fast food restaurant
- Dine-In restaurant
- Pizzeria
- Food court restaurant
- Night club
- Bar and lounge
- Corner store

All aspects of the user interface are customizable with your custom graphics and text, including full Unicode support for Cyrillic languages such as Serbian and Russian and left-to-right languages such as Hebrew and Arabic, and Asian languages including Japanese and Chinese. The ability to easily add custom text is available for languages not included in the default database.

The demonstration database includes pre-configured menus for business types listed above and is recommended for new users.

## 2.2 Product Info & Licensing

### What's Included?

AmigoPOS comes standard with a full compliment of modules at no additional cost. There are no monthly fees and same-version downloadable updates are provided free of charge. 3rd party applications such as [Intuit QuickBooks](#)<sup>[995]</sup> are not included and must be obtained separately.

### POS Licensing

The pos application is licensed on a per-computer basis using a serial number generated for a specific pc name, pos station id and other hardware identifiers. Note that the serial number generated for a specific pc will not work on other pcs. A license is required only on pos stations where orders are taken or customer receipts are printed. A license



is not required for computers that run back office, fingerprint management or other components such as remote display or QuickBooks® interface included with AmigoPOS.

### Tablet Server Licensing

A single tablet server license is required to run any number of tablets. Tablets are capable of printing customer receipts and prep tickets (including sending orders to the remote display).

### Evaluation Version

Evaluation version users are not time limited and are able to thoroughly use all features to determine suitability for your business. When you decide to purchase AmigoPOS, the evaluation database can be retained and all menu, inventory, employee, configuration settings stored in the database and all local devices settings are saved. The only limitation is that menu item names are obscured on both customer receipts and prep orders (or remote display). All devices and peripherals can be configured and tested using the evaluation version.

## 2.3 Features Overview

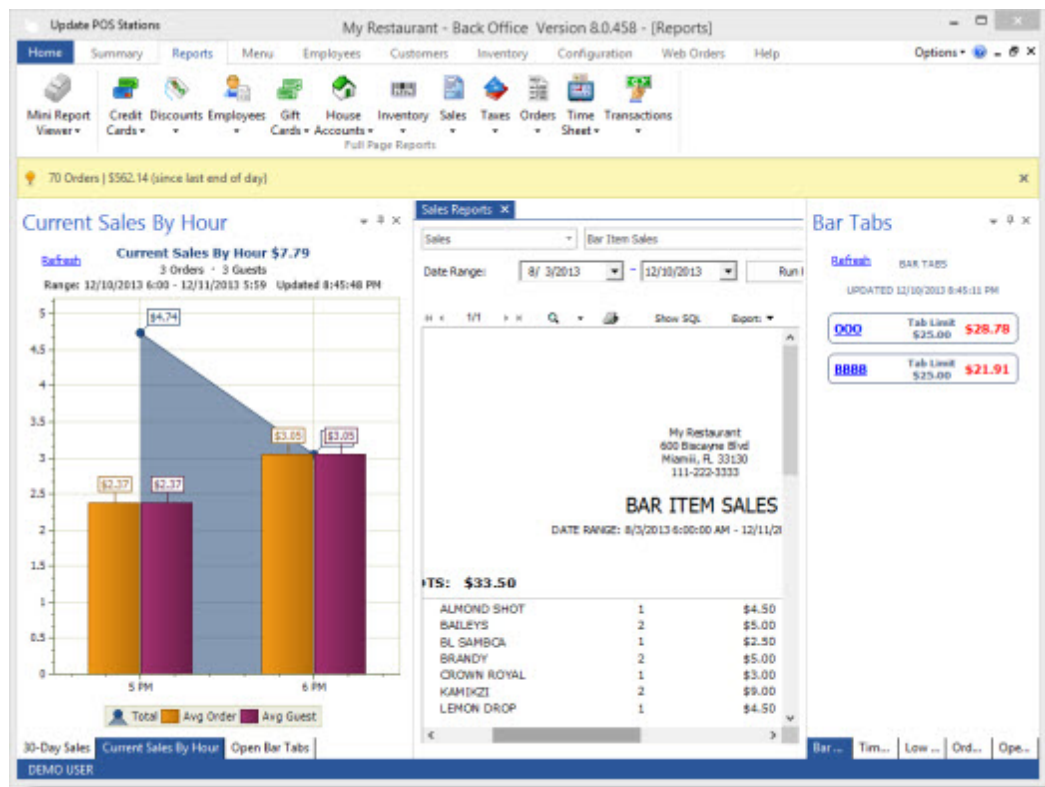
AmigoPOS includes two main components, the AmigoPOS **Front End** and **Back Office**.



**AmigoPOS Front of House**

The front end is used for most pos functions including order entry and recall, time clock, transactions, credit card processing and cash drawer management. All features that require text or numeric entry provide an on-screen keypad or keyboard, eliminating the necessity for an external keyboard. The use of a touchscreen display eliminates the need for a mouse. Most buttons contain customizable text and are designed specifically for touchscreen use. The front end will run on any monitor capable of **800 x 600 pixel** screen resolution, eliminating the need for a more expensive high resolution. In addition, many

newer **UMPC** (Ultra Mobile PC) devices are capable of running 800x600 pixel screen resolution, allowing AmigoPOS to run on many wireless handheld devices without compromising any aspect of the user interface.



### AmigoPOS Back Office

Back office is used for program setup, configuration and management. All regular, retail, bar and pizza menu items are managed in back office. Data is displayed in user friendly data grids that allow viewing in either List View or Detail View modes and can be exported for use in many popular spreadsheet or database programs. Back office requires a keyboard and mouse to be used effectively. When running back office on pos pos stations, many users elect to use wireless keyboards and pointing devices, storing the devices in a drawer when back office is not in use. Back office can be installed on any PC without a USB Software Protection Device, eliminating the need for an additional AmigoPOS license. If a USB Software protection is not present, Back Office can not be used to reprint orders, but all other functions, including report printing, are available. Back office is installed by default during AmigoPOS installation and can be opened in stand-alone mode by clicking the Back office link in the AmigoPOS Start Menu Program Group or run by pressing the Back Office icon on the AmigoPOS Front End after logging in with appropriate permissions.

AmigoPOS includes many unique features that enhance the user experience. A partial list of features appears below:

- Add customer info to order at any time
- Advanced customer management and tracking
- Back office management on all pos stations
- Bulk settle or check-in driver trip orders
- Bulk settle or check-in server bank orders
- Bulletproof Microsoft SQL database technology
- Centralized image storage and management in SQL database

- Comprehensive system security based on user permission
- Conveniently reopen settled orders for transaction adjustments, refunds or voids
- Currency presets for one-touch cash-out
- Customizable signature slips for credit card transactions
- Customize order types based on menu or customer
- Default menu type per order type
- Delivery trip orders show total number of items per order
- Easily change table on order entry screen
- Easy menu item editing in Back Office
- Exclude menu items from certain order types
- Exclusive & required modifiers
- Force user to clock in before shift
- Force user to settle or transfer all orders before clock-out
- Full support for Canadian GST, PST & Ontario tax rates (minimum \$4 total for GST)
- Full support for ESC/POS and Star Line impact printers (remote print)
- Full support for ESC/POS and Star Line thermal receipt printers (customer receipt or remote print)
- Highly customizable prep tickets include the ability to print customer information
- Highly customizable user interface
- Integrated full-size and mini reports
- Integrated interface to Datacap NETePay, OpenEdge and ChargeItPro
- Integrated Intuit QuickBooks accounting interface
- Mandatory gratuity for per order type
- MS Windows Vista compatible
- Multi-line caller-id interface
- Multiple addresses & phone numbers per customer
- Multiple cash drawers per pos station
- One touch change order type on order entry screen
- Optional customer receipt printing
- Perform all administrative tasks at any pos station
- Print optionals and or menu items in red
- Proven Reliability

- Real-time inventory management
- Reset one or multiple drawers per pos station simultaneously
- Share receipt printers among multiple pos stations
- Simple one-touch end-of-day procedure
- Special pricing for customer loyalty card program
- Split and print orders based on guest or amount
- Stand-alone back office installation with integrated login screen
- Support for multiple phone number area codes
- Suppress zero-cost optionals on orders
- System-wide server and driver banking
- Tax-exempt customer presets
- Time and Attendance / Labor Scheduling
- Track bank check number and gift certificate number at tender
- Unlimited cash Payout reasons
- Unlimited customizable order types (dine-in, retail, etc)
- Unlimited Deleted Item reasons
- Unlimited Job assignments per employee
- Unlimited pizza size to pizza ingredient mapping with multiple price levels
- Unlimited pizza size to pizza style mapping with multiple price levels
- Unlimited transaction types with corresponding reporting
- Unlimited Void reasons
- VAT tax capable
- 300+ beer logos pre-loaded into bar menu
- 5 upcharge/downcharge price levels per optional
- Bar tab management from order entry screen
- Button customization includes size, font, color and image
- Comprehensive bar recipe list with correct glass and ingredients
- Comprehensive driver routing with gratuity tracking
- Comprehensive tracking of removed order items
- Easily combine 2 or more orders
- Easy misc (one-time) item entry on order entry screen

- Easy one-touch repeat for previous customer orders
- Easy quantity change and remove
- Highly customizable customer receipts
- Icon based graphical order entry for status at a glance
- Integrated interface to OPOS counter scales
- Integrated random-weight barcode capability
- Item lookup by SKU or PLU
- Manual hold-and fire on a per item basis
- Manual hold-and fire on a per item/per order basis
- Multiple phone numbers per customer
- On the fly one-time price change
- One touch drawer open/exact change for bartenders
- One touch order splitting
- Optional mandatory drink selection for each guest
- Per-guest menu item assignment
- Perpetual open orders for tabs and catering
- Pre-authorize new bar tab from order entry screen
- Quick service mode for rapid order entry
- Rapid switch user on order entry screen
- Shortcuts for non-barcoded retail items
- Simultaneous regular menu, bar, pizza and retail item entry
- Suspend and resume orders
- Transfer orders to different driver
- Transfer orders to different server
- Triple-sized buttons on a per-category basis
- Unlimited bar categories
- Unlimited optional groups
- Unlimited pizza sizes, pizza styles, and pizza ingredients
- Unlimited regular menu categories
- Unlimited regular menu items per category
- Unlimited regular, exclusive and required optionals per group

- Unlimited special pricing and happy hour rules by day/time
- Unlimited transactions (payments) per order
- Up to 10 remote printers/monitors for prep routing
- Up to 5 remote label printers
- Comprehensive reporting of items sold
- Comprehensive sales tax reporting
- Condensed view for rapid editing
- Customizable logo and business information on reports
- Dashboard provides all vital statistics at a glance
- Direct database access with MS Access, MS Excel or other accounting tools
- Easy seating drag & drop chart configuration grid
- Inventory tracking by Case SKU, Pack SKU, or item SKU
- On screen data view in list or detail format
- One-click add new images to database
- Print mini reports directly to receipt printer
- Report filters allow easy date range and other parameter selection
- Sales by employee reporting
- Sales by order type reporting
- Sales by pos station reporting
- Sales by transaction type reporting
- Share inventory items between retail and regular menus
- Smart color pickers for customizing button and font colors
- Unlimited color support for image background transparency
- View on screen full sized reports or print to any letter sized printer
- Export reports to PDF, HTML, Text and other formats
- Full customer tracking including order history
- Graphical scheduling system
- Sales by employee reporting
- Sales by order type reporting
- Sales by pos station reporting
- Sales by transaction type reporting

- Share inventory items between retail and regular menus
- Smart color pickers for customizing button and font colors
- Unlimited color support for image background transparency
- View on screen full sized reports or print to any letter sized printer

## 2.4 What's New

New features, program updates and fixes are continually added to AmigoPOS and made available as downloadable [updates](#)<sup>76</sup>. Subscribe to the twitter feed at <https://twitter.com/amigopos> to stay updated.

Part 3

# Installation



## 3 Installation

### 3.1 Getting Started

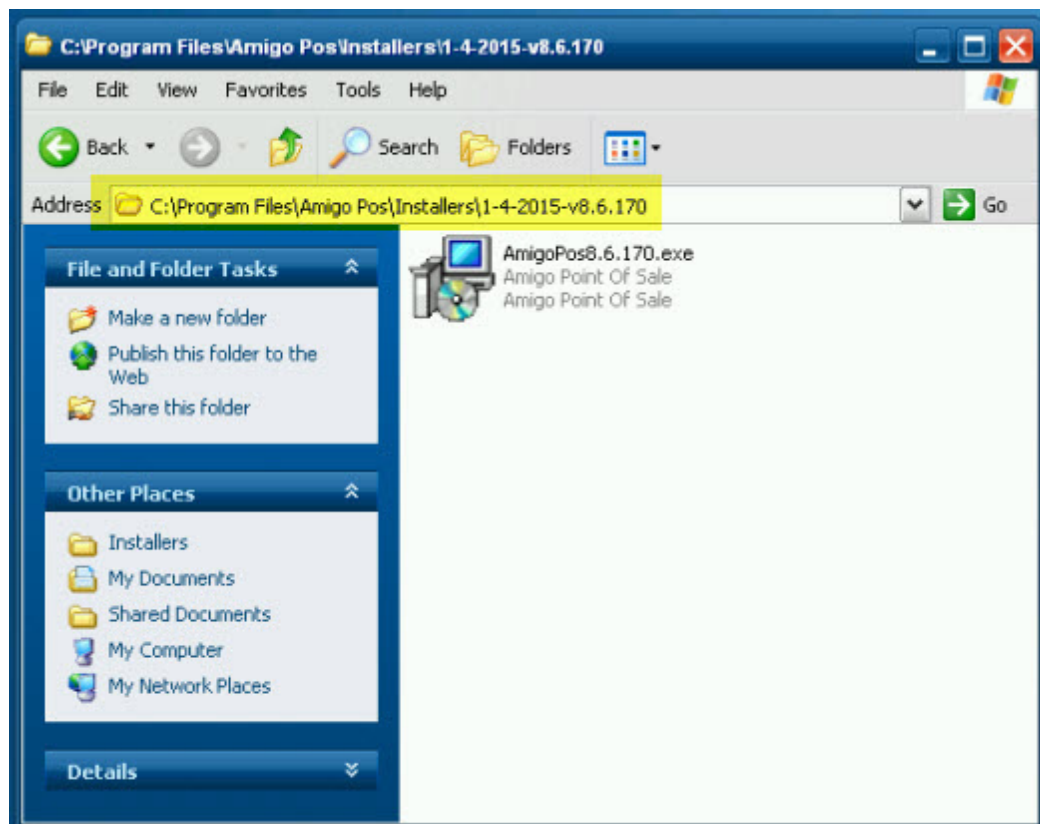
Before starting installation, make a note of any required system settings that may be required including remote print server IP addresses, local COM port numbers and the SQL Server Express connection settings shown in the database configuration utility on the pos station where SQL Server Express is installed (when AmigoPOS has been previously installed on another pos station on the network). Note that **the same version of AmigoPOS must be installed on all pos stations, back office computers, remote display computers and tablets**. When performing an update, install the update on all pos stations, back office computers, remote display computers and tablets.



**Amigo Pos 8 Installer**

- AmigoPOSInstallation can be installed on any computer that meets the [minimum system requirements](#)<sup>[80]</sup>.
- The current release can be installed without uninstalling the previous release and will continue to use the same database and all local settings stored in the local system registry.
- After installation is complete, install any devices as described in other sections of this file, testing each device after installation to ensure that all settings are correct.

During installation, a backup of the installer is copied to the program installation directory. For example, on 32-bit computers, the typical program installation directory is `C:\Program Files\AmigoPOS` and the installer backup is located in the directory named `Installers` and sub-directory named with the current date and program version, i.e. `C:\Program Files\AmigoPOS\Installers\1-4-2015-v8.6.170`. On 64-bit Windows 7/8/8.1, the directory is most likely `C:\Program Files (x86)\AmigoPOS\Installers\1-4-2015-v8.6.170`.



Installer Backup

## 3.2 Overview

This help topic is also available by clicking the help button at the bottom right of the AmigoPOS 8 installer. The following topic describes each step of the setup wizard. Additional information is available in the full help file available at <http://www.amigopos.com/help/html/index.html>.

- [Windows User](#) <sup>[27]</sup>
- [Prerequisites](#) <sup>[28]</sup>
- [Program Updates](#) <sup>[28]</sup>

The following options are available the **first time** AmigoPOS is installed. The screens are suppressed on subsequent installations to allow for minimal disruption when the latest release over an existing installation.

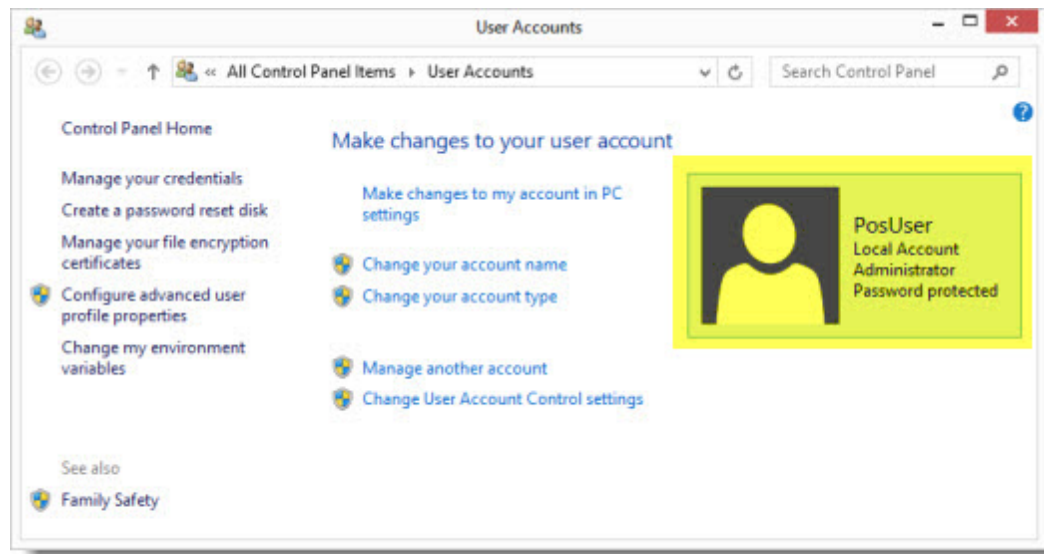
- [Screen Size](#) <sup>[28]</sup>
- [Help File](#) <sup>[29]</sup>
- [Database](#) <sup>[30]</sup>

The typical installation screens are shown below for first-time installation. Many of these screens are suppressed on subsequent installations.

- [Typical Installation](#) <sup>[31]</sup>

### Windows User

The AmigoPOS setup application installs AmigoPOS only for the user currently logged in to Windows. For example, suppose that the user named PosUser installs AmigoPOS and logs out of Windows. If the Guest user logs in to Windows, AmigoPOS will not be accessible until Guest logs out and PosUser logs in to Windows again.



Windows 8 User Account

### Prerequisites

The AmigoPOS 7 installer will check the workstation for the presence of **Microsoft .Net Framework 4** and automatically download and install when necessary. If the workstation is not connected to the internet, download and install the framework before attempting to install AmigoPOS. The Microsoft .NET Framework 4 Standalone Installer for both 32- and 64-bit Windows is available to download at <http://www.microsoft.com/download/en/details.aspx?id=24872>. A reboot may be required after installing the Microsoft .NET Framework 4. If so, run the AmigoPOS installer again after the workstation is rebooted. Additional prerequisites are described in the [SQL Server Express Prerequisites](#) topic.

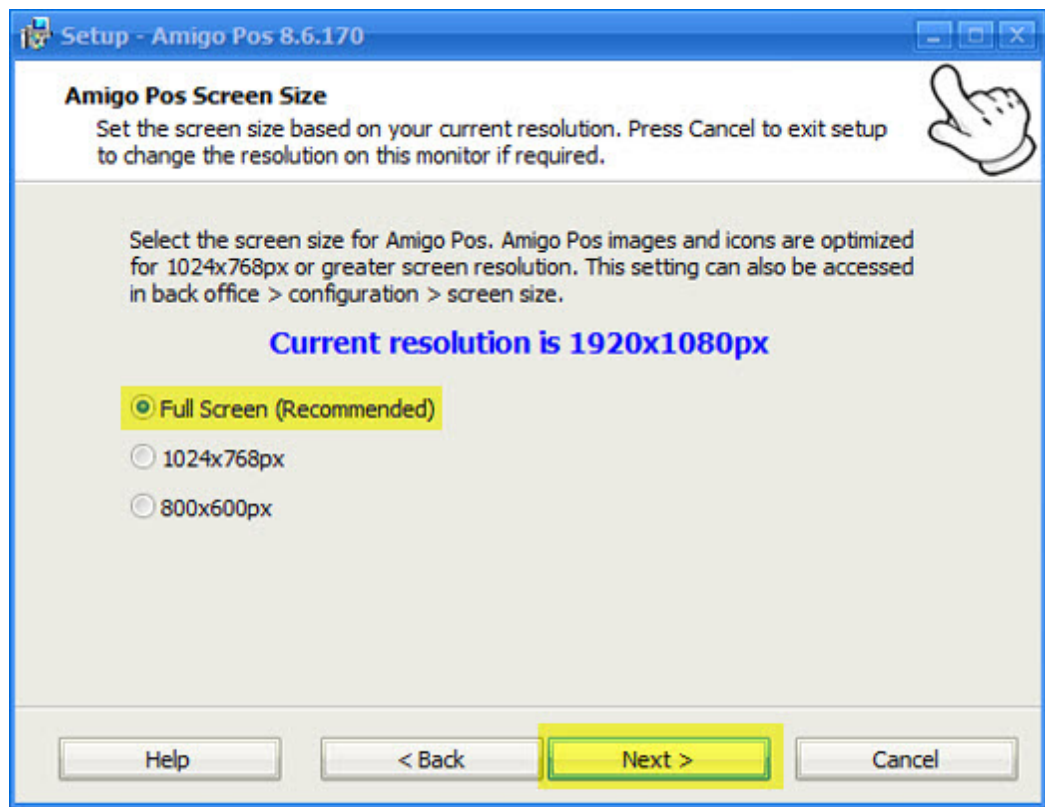
### Program Updates

The newest features listed in Back Office > Help > Program Updates are available by installing the latest release. Use the following guidelines when installing updates:

- [Back up the database](#) before installing an update (the database should be set to back up on a regular schedule as shown)
- Shut down AmigoPOS at all workstations and tablets before installing a new release. Run the installer on every workstation and tablet, including back office computers. Every workstation on the network must run the same version of AmigoPOS.
- There are no incremental patches and the existing AmigoPOS installation does not have to be uninstalled before installing the current release.
- When installing a new release on a workstation that already has AmigoPOS installed, all database and program settings are retained and the database is updated to support new features as required.

### Screen Size

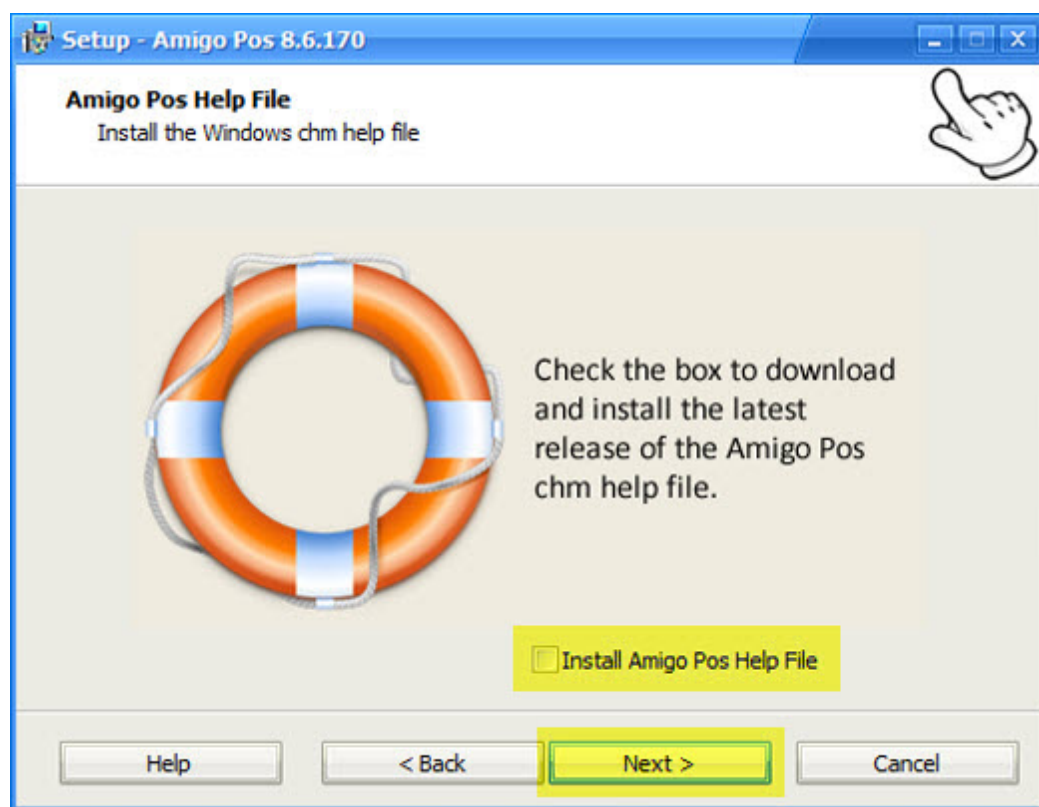
Most installations require AmigoPOS to run at full screen so that the user does not have access to the underlying Windows desktop. However, it may be necessary to access Windows desktop during initial setup and configuration. AmigoPOS can be set to run at 1024x768 and 800x600 pixels. If the screen resolution is less, the option is disabled, i.e. if the current screen resolution of the workstation is 800x600px the option to allow AmigoPOS to run at 1024x768 is disabled.



Screen Size

**Help File**

The AmigoPOS chm help file is not included with the installer to minimize the download time. Check the box to automatically download and install the help file when installation begins. If an internet connection is not available, download the help file installer from the driver downloads page at <http://amigopos.com>.

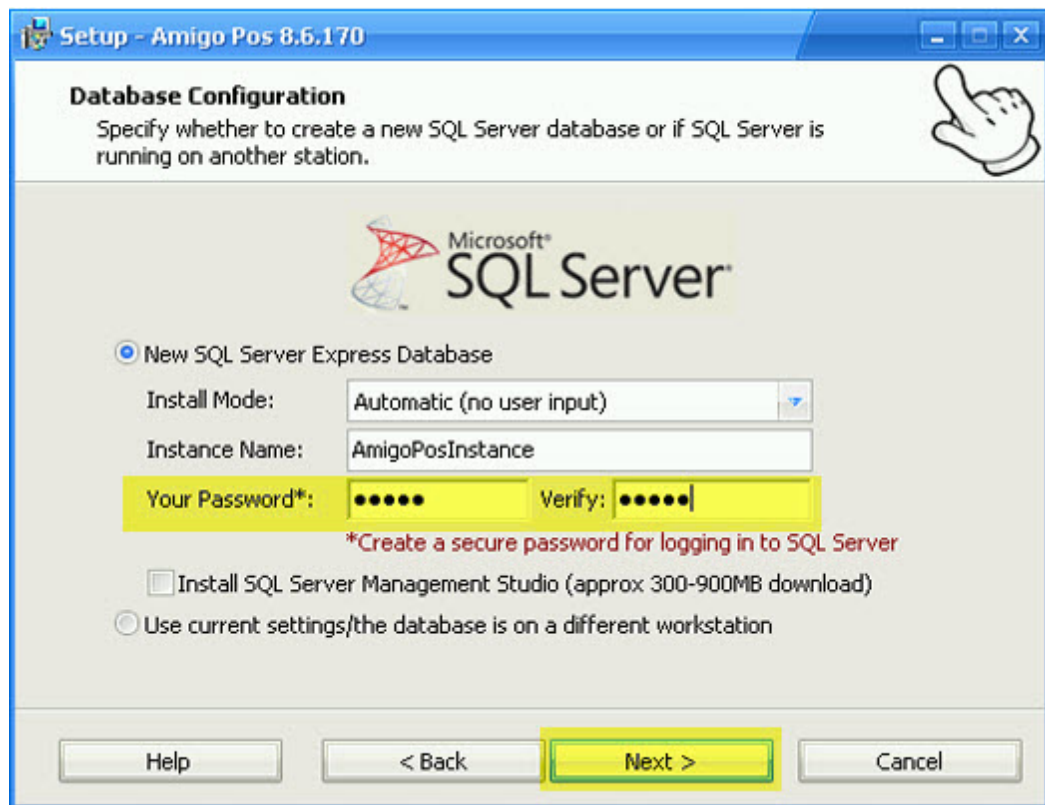


**Windows (chm) Help File Installer**

### Database

The AmigoPOS installer will automatically install and configure the Microsoft SQL Server Express database on workstations where AmigoPOS was not previously installed. If AmigoPOS was previously installed, the screen is suppressed and the existing database settings will not be modified. The database settings can be modified after installation by running the database configuration utility. SQL Server Express database engine should be installed on the main pos station, not a back office server, so that there is at least one pos station that is available in the event of network disruption.

- On a multi-workstation system where the SQL Server Express database server has already been installed on a different workstation, select Use current settings/the database on a different workstation. If AmigoPOS was installed previously on the same computer, this option is already selected. For new installation where the SQL Server Express database server is installed on a different computer, when installation is complete, use the database configuration utility to set the database connection. If this is a new installation, check the box to download and install Microsoft® SQL Server® 2012 Native Client (Windows 7/8/8.1/10). After installation, use the database configuration utility to connect to SQL Server Express on the other workstation (enable the TCP/IP protocol as described in the AmigoPOS help file).
- Windows 7/8/10 users already have the prerequisites installed by default. The **New SQL Server Express Database** option is disabled if the prerequisites (Microsoft .Net Framework 4 Client Profile, Microsoft .Net Framework 3.5 SP1 and Windows Installer 4.5) are not installed. Additional information is available in the [MS SQL Server Express](#) <sup>43</sup> topic.
- A password is required for new SQL Server Express installations. The password is used to access SQL Server Express directly using Microsoft SQL Server Management Studio or similar database management utilities. In addition, this password is used to connect to the database server from other pos stations and back office computers.



**New SQL Server Express Installation**

## Typical Installation

### Step 1: Welcome Screen

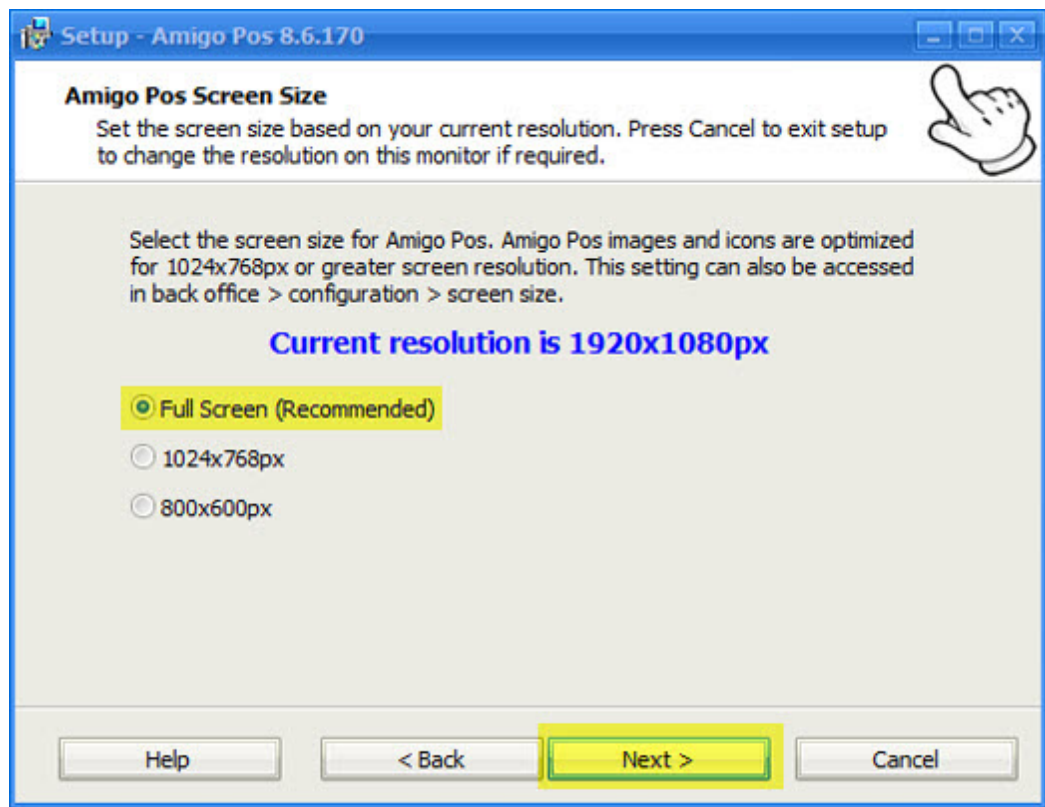
The welcome screen displays the version number and whether it is the demo version or full version. Note that the demo version cannot be licensed, but all settings entered on the demo version will be retained if the full version is installed.



**Welcome Screen**

**Step 2: Screen Size**

Select the screen size and click **Next** to continue

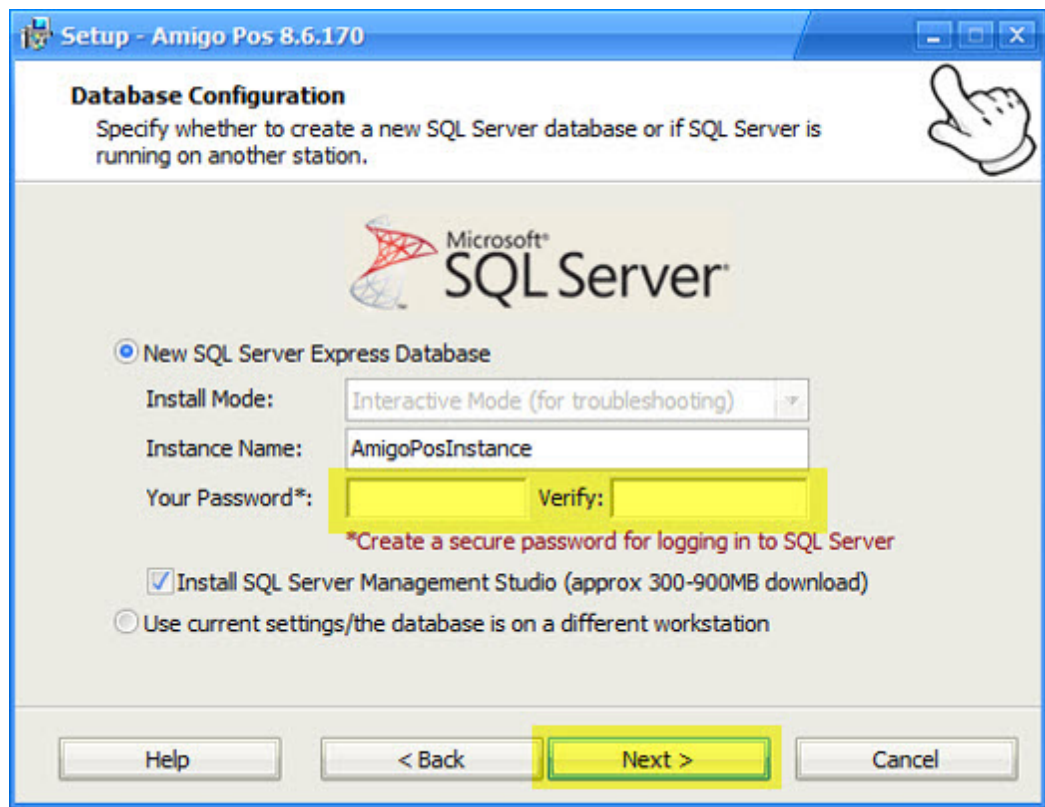


Screen Size  
Screen Size

### Step 3: Database Settings

Choose whether to install the SQL Server Express database engine (or SQL Native Client) as described above and click **Next** to continue.

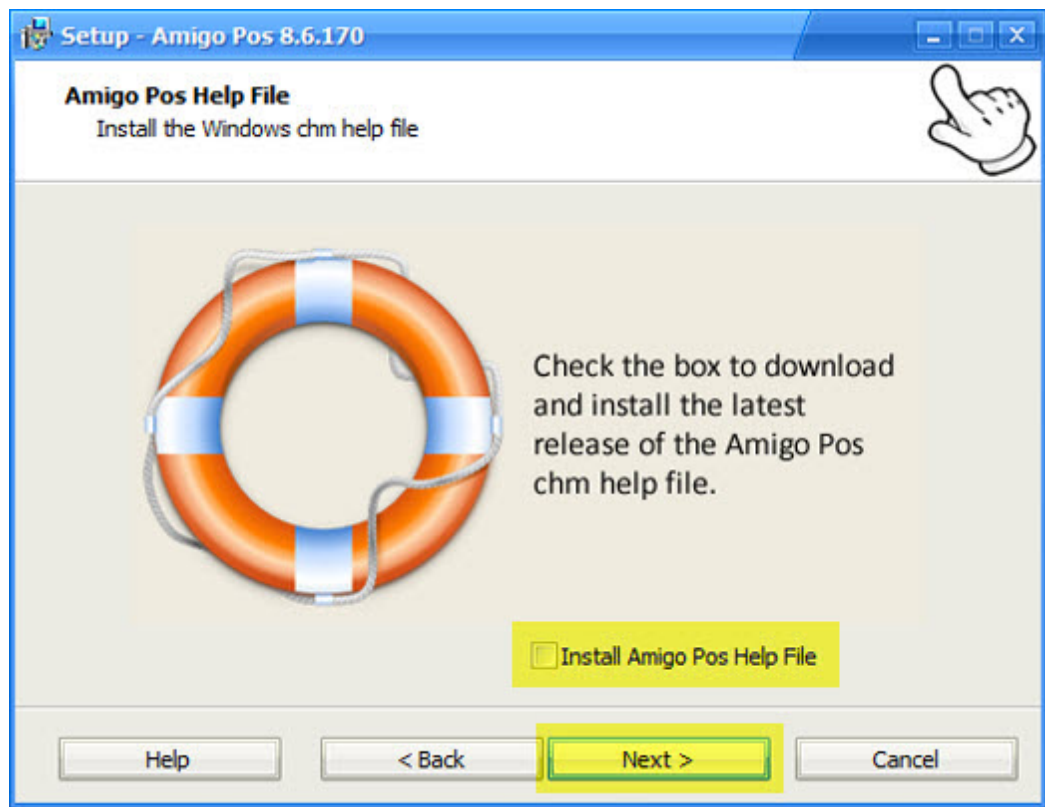




**New SQL Server Express Installation  
Database Settings**

#### **Step 4: AmigoPOS Help File**

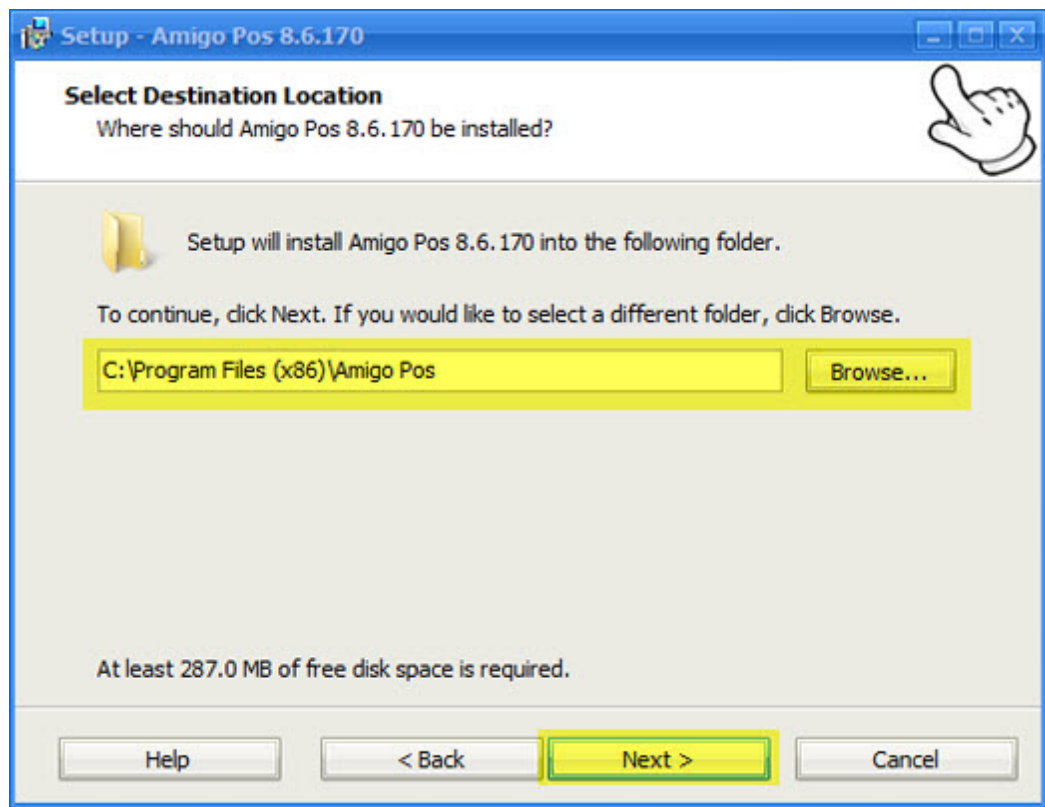
If necessary, check the box to download and install the help file as described above and click **Next** to continue.



Windows (chm) Help File Installer

#### Step 5: Application Folder

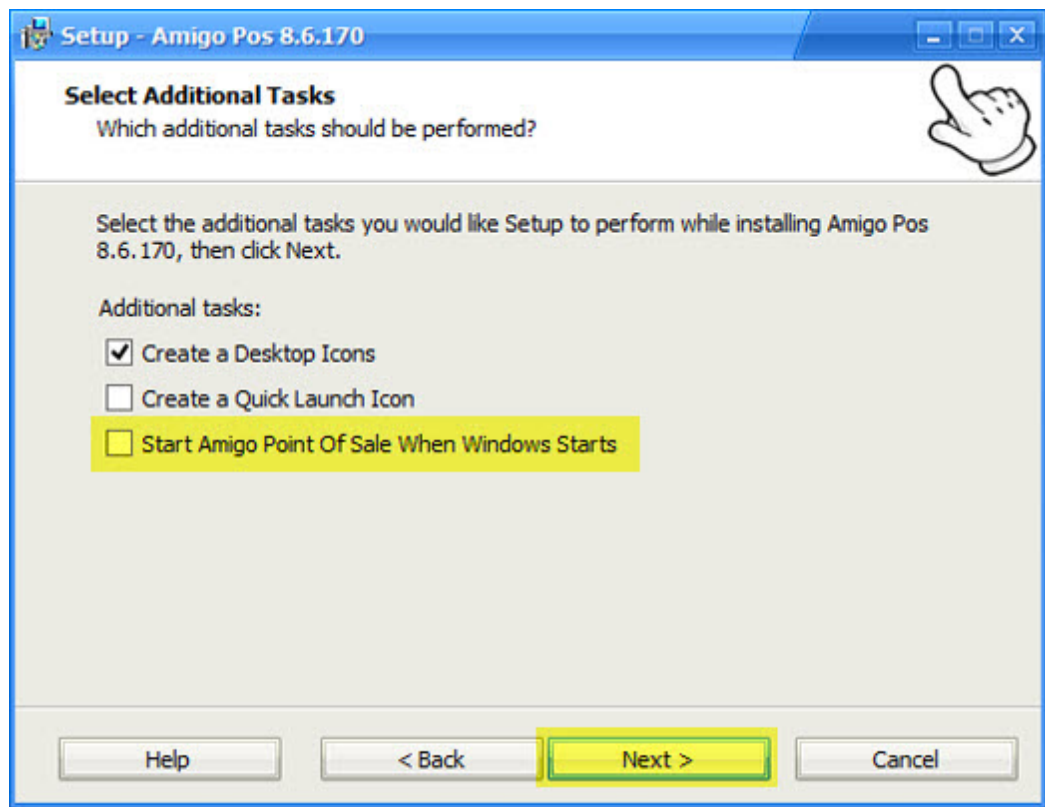
The default application folder, [C:\Program Files \(x86\)\AmigoPOS](#) on Windows 7/8/8.1/10 64-bit or [C:\Program Files\AmigoPOS](#) on Windows 7/8/8.1/10 32-bit, can be changed if necessary, although not recommended. Click **Next** to continue.



#### Application Folder

#### Step 6: Desktop Icons and AmigoPOS Startup

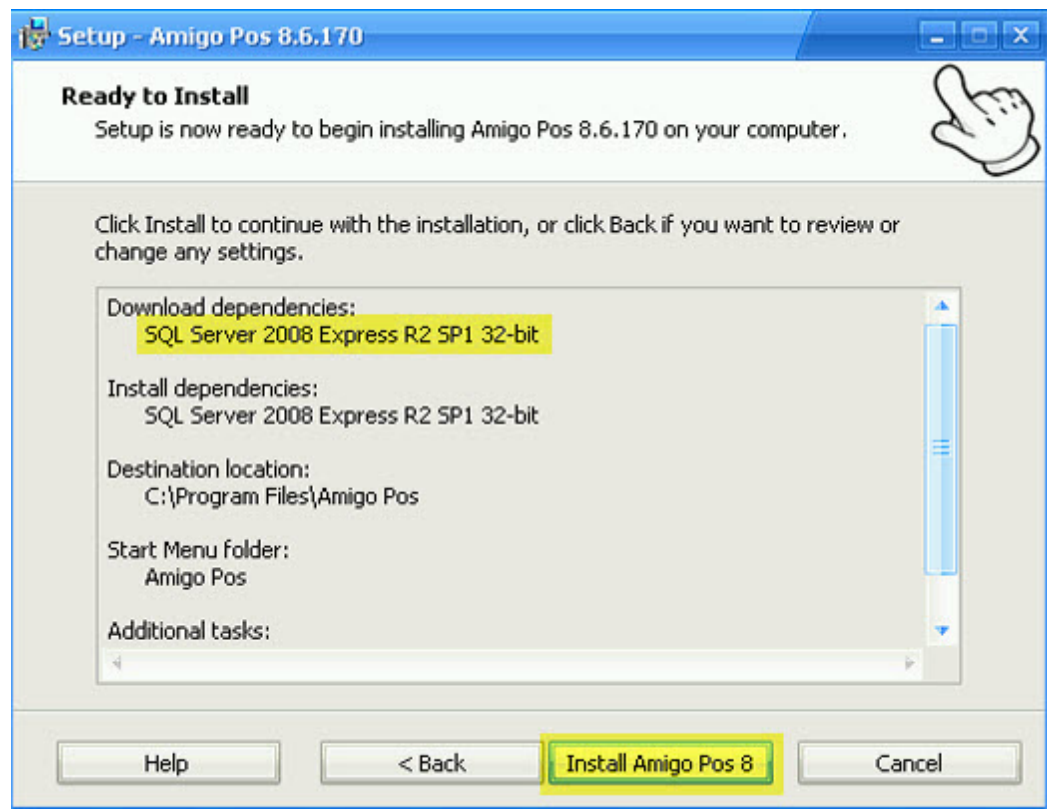
Check the box to create desktop shortcuts and to launch AmigoPOS when Windows starts. Click **Next** to Continue.



**Select Additional Tasks**

#### **Step 7: Ready to Install Confirmation**

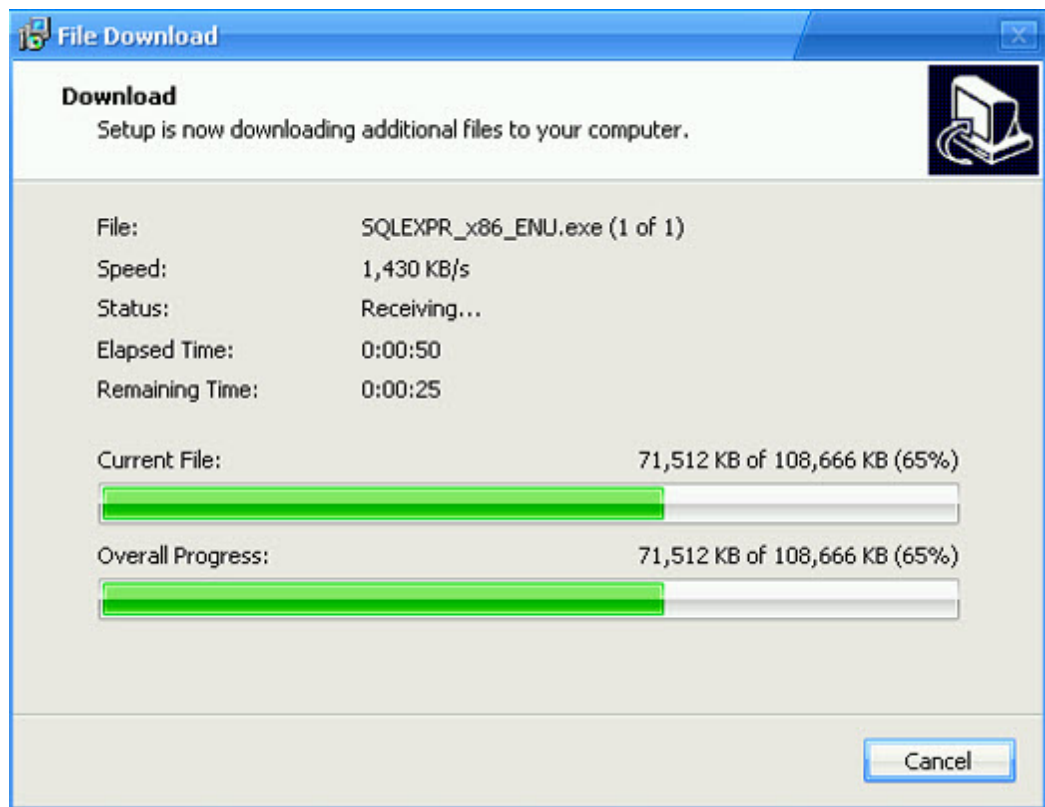
The list of prerequisites is shown with the application folder. Click **Install AmigoPOS 7** to continue.



Ready to Install

#### Step 8: Download Progress

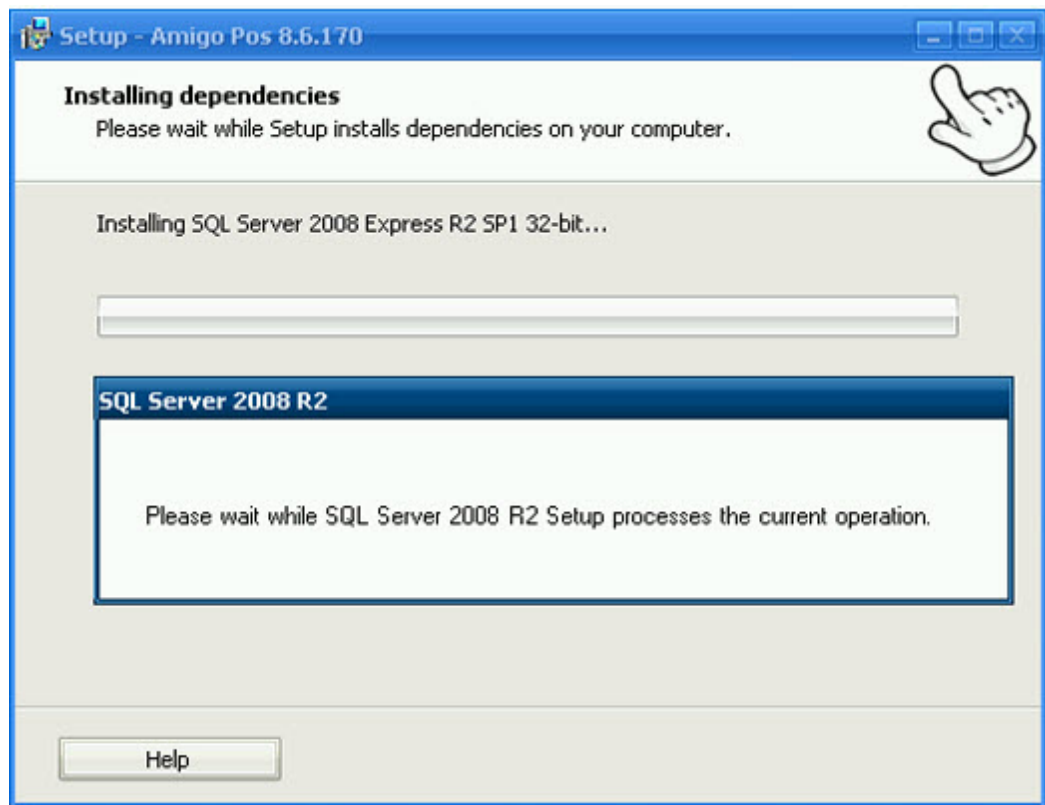
The progress of the current file download and total download progress is displayed along with a time estimate. Use input is not required.



#### Downloading Prerequisites

#### Step 9: Installing Dependencies

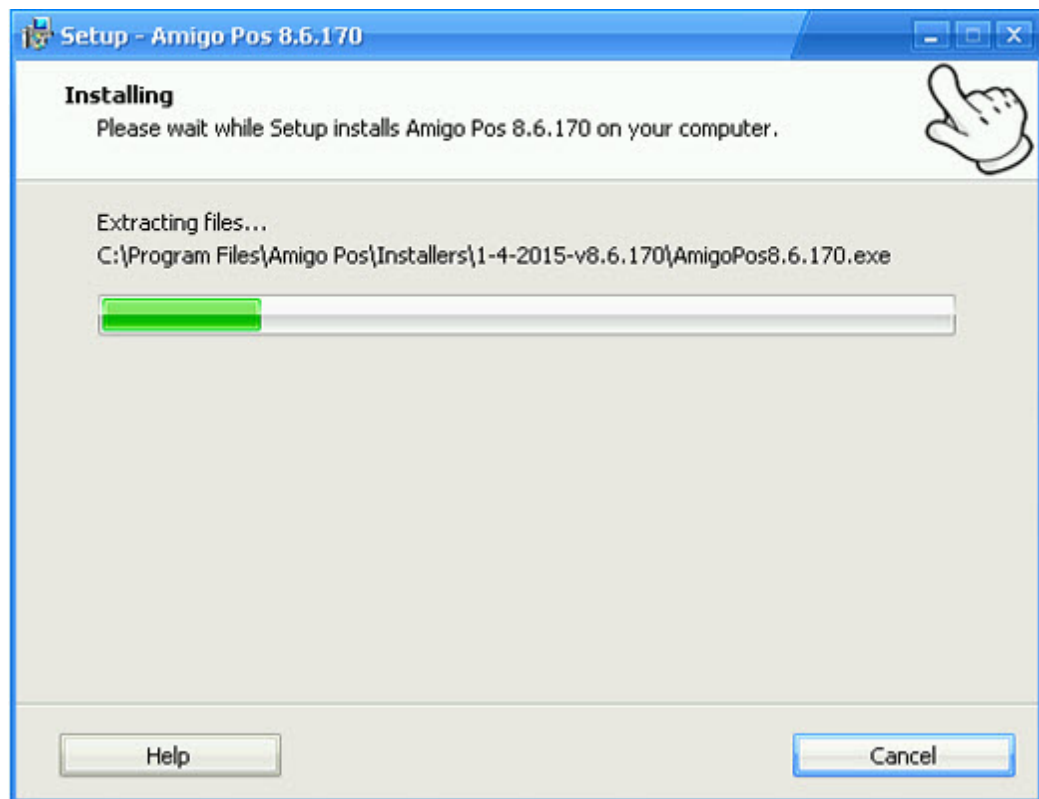
Some prerequisites may require user input, i.e. the user must agree to the Microsoft .Net Framework 4 Client Profile license terms for installation to proceed. Other prerequisites, such as SQL Server Express, require no user input.



#### Installing Prerequisites

#### Step 10: AmigoPOS Installation

AmigoPOS files are now installed with any additional prerequisites that are included in the installer. User input is not required.

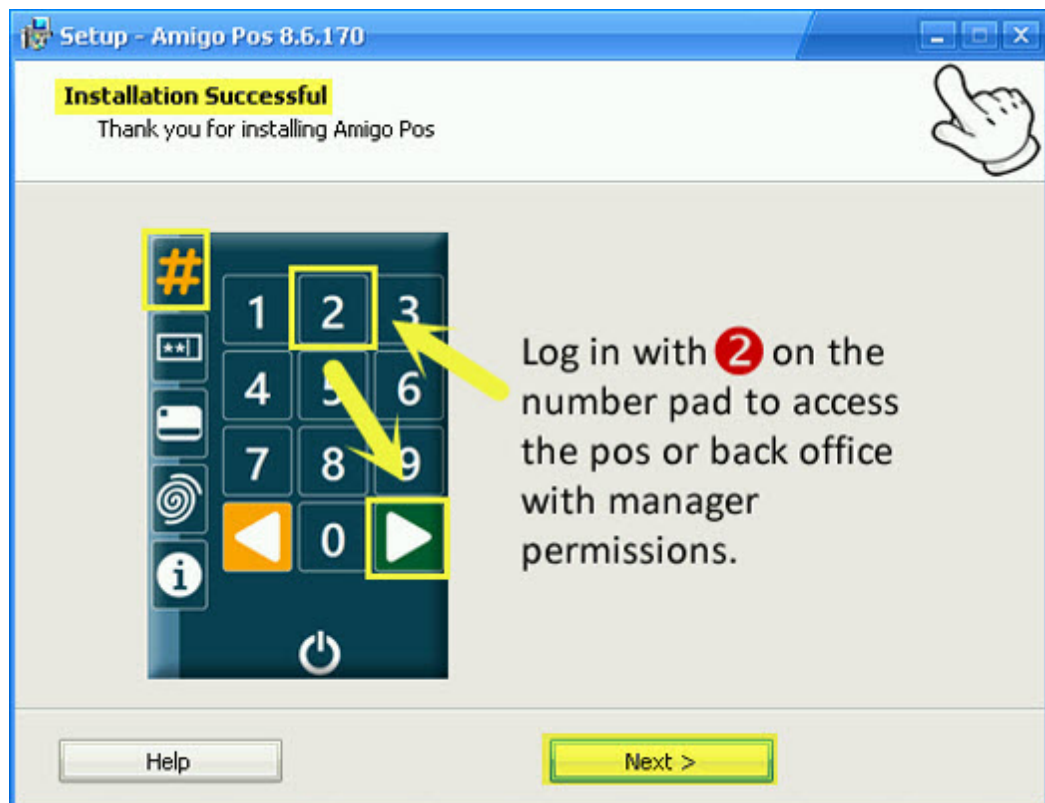


Installing Amigo Pos Program Files

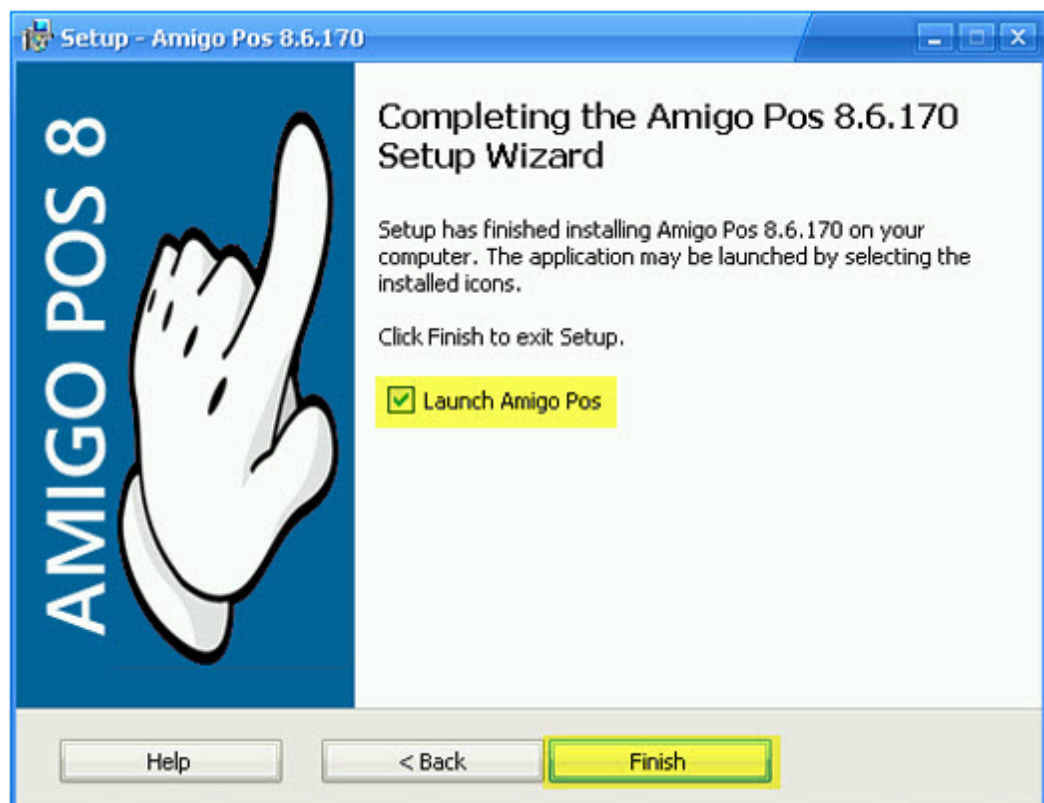
#### Step 11: Confirmation

When the installation is complete, you may be prompted to reboot if any files were in use by other applications. Otherwise, you may check the box to run AmigoPOS automatically when the **Close** button is clicked.





Installation Successful



Installation Finished

### 3.2.1 SQL Server

#### 3.2.1.1 Overview

The Microsoft SQL Server Express database server is used by AmigoPOS because it provides greater stability and greatly reduces chance of corruption due to abrupt computer shutdown or network disruption. SQL Server Express is installed on the main pos station and other pos stations and back office computers connect to SQL Server Express over the local network.

The preferred location to run SQL Server Express is the main pos station, not a back office workstation so that the main pos station can continue to function in the event of network disruption. The AmigoPOS installer can install and configure MS SQL Server Express automatically if the workstation is connected to the internet. Note that this option may add 10-25 minutes to the total setup time. Windows 7 users should verify that Microsoft .Net Framework 4 is installed before proceeding. Installation failures are usually caused by failure to restart the workstation after a prerequisite is installed. The detailed system requirements for SQL Server Express 2012 are listed on the [Microsoft](#) web site.

#### SQL Server Version

##### Windows 10

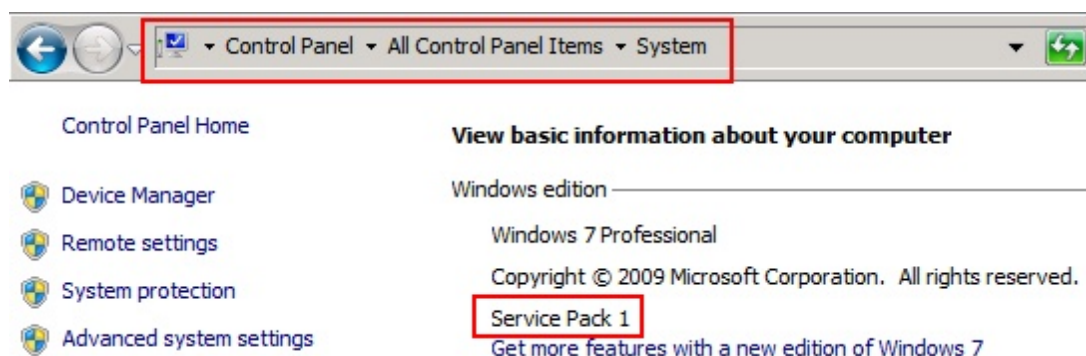
SQL Server Express 2012 is installed by default. The installer will automatically download the correct version based on the architecture (32-bit for x86 and 64-bit for x64). Windows 10 ships with all of the prerequisites installed.

##### Windows 8/8.1 (not Windows RT)

SQL Server Express 2012 is installed by default. The installer will automatically download the correct version based on the architecture (32-bit for x86 and 64-bit for x64). Windows 8/8.1 ships with all of the prerequisites installed.

##### Windows 7/PosReady 7

SQL Server Express 2012 is installed by default. The installer will automatically download the correct version based on the architecture (32-bit for x86 and 64-bit for x64). Windows 7 and PosReady 7 workstations must have Service Pack 1 (SP1) installed or the SQL Server installation will fail. Note that most Windows 7 users already have Service Pack 1 installed if Windows Update is enabled or the PC shipped after February 9, 2011.



### Windows 7 with Service Pack 1 Installed

#### Summary of Steps

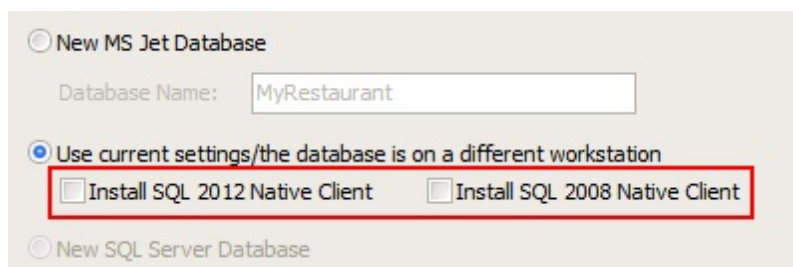
1. Network all pos stations, back office computers and remote display computers using a Windows Homegroup
2. Install AmigoPOS and SQL Server Express on Pos Station 1. The main pos station should always be used to host SQL Server so that the main pos station will continue to function in the event of network interruption.
3. Install AmigoPOS with SQL Native Client on any additional pos stations or office workstations
4. Install SQL Backup and FTP on the same pos station (Pos Station 1) that is running SQL Server Express

#### Reboot

Best practice is to reboot the workstation before running the AmigoPOS installer if SQL Server Express will be installed. SQL Server Express installation will fail if the workstation has a reboot pending, usually from installing Windows Updates, Microsoft .Net 3.5 SP1 Framework or Microsoft .Net 4 Framework.

#### Client Workstations

Note that SQL Server Express should be installed at a single workstation only. When AmigoPOS is installed at the other workstations, select the **Use current settings/the database on a different workstation** option and check the box to install Microsoft® SQL Server® Native Client. Select the correct version of Native Client for the SQL Server Express version running on the main pos station.



### Install SQL Native Client at all other workstations

It is recommended for MS SQL Server Express to be installed at the main pos station (i.e. cash drawer station or station closest to the door) so that at least one pos station is usable in the event of local network failure. Furthermore, if SQL Server Express is running on an office workstation and the workstation should require reboot due to automatic installation of

Windows updates, the database server may be offline until the system is rebooted. If the office is inaccessible (i.e. door locked), the pos stations will be unable to connect to the database.

A system reboot is not required after installation. After AmigoPOS is started for the first time, the Database Connection error screen will appear. Click Retry and enter the same SQL Server connection settings as the pos station running SQL Server Express (available at Pos Station 1 > Back Office > Configuration > Database Setup).

## Settings

The default instance for SQL Server is **SQLExpress** and the database server can be accessed by using the workstation name and instance, ie **COMPUTERNAME\SQLEXPRESS**. The sa password is the password for the system administrator. Enter a strong password that is hard to guess. If the password is forgotten, the only way to reset the password is by using MS SQL Management Studio to connect to the database server using Windows authentication and then resetting the password.

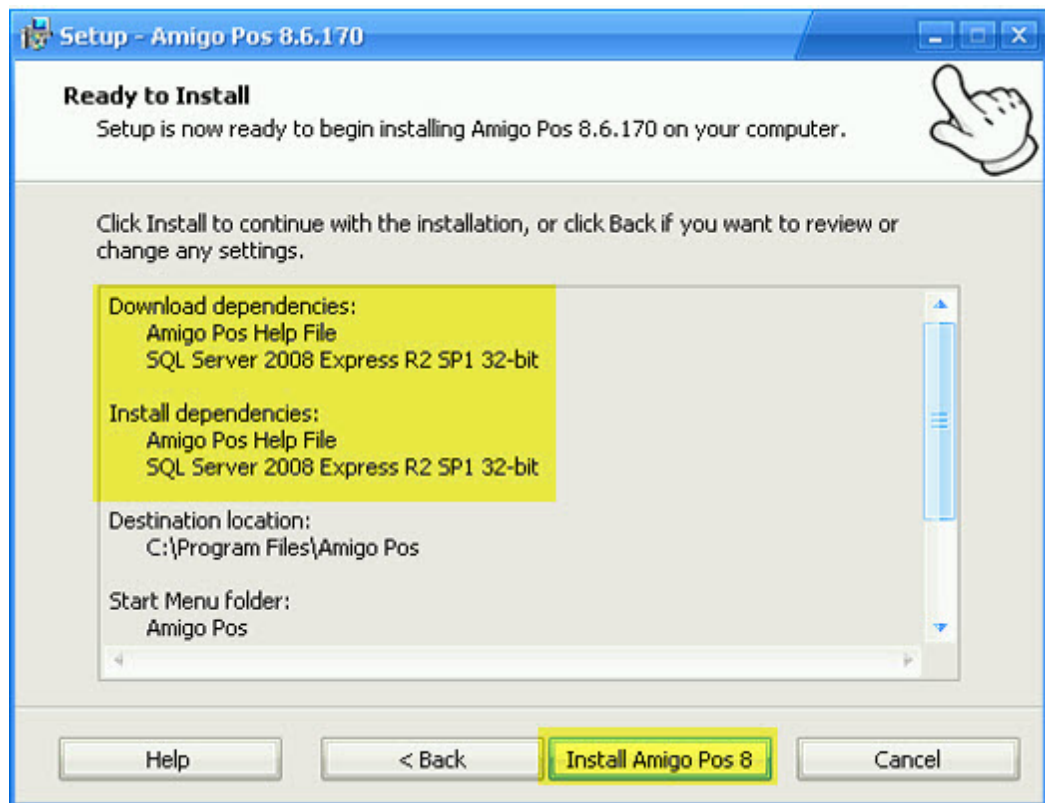
The installer will create a new database named AmigoPOS after SQL Server Express is installed. Note that the installation will fail if either (a) SQL Server Express was previously installed at the workstation with the default instance SQLExpress or if a database named AmigoPos.mdf already exists in the SQL Server Express data folder. The installer has been configured to automatically enable both the Named Pipes and TCP/IP protocols. In addition, the installer will automatically create firewall exceptions based on the script in the [SQL Server Firewall Exceptions](#) help topic.

After installation, the AmigoPOS back office database configuration is updated automatically with the new database server name, instance, database name, login id and password.

## Installation Progress

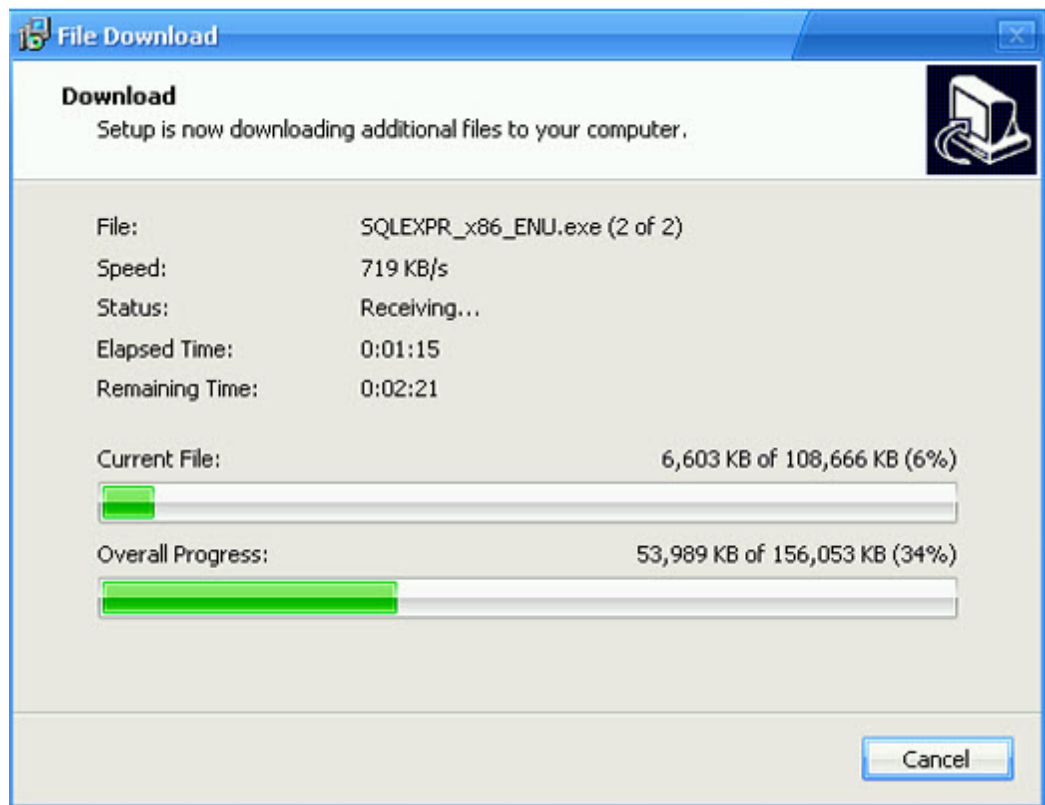
The following images describe the typical installation sequence of SQL Server Express. Total time is 10-25 minutes depending on the processor and available memory.

On the installation confirmation screen, SQL Server Express appears on the list of files to download.



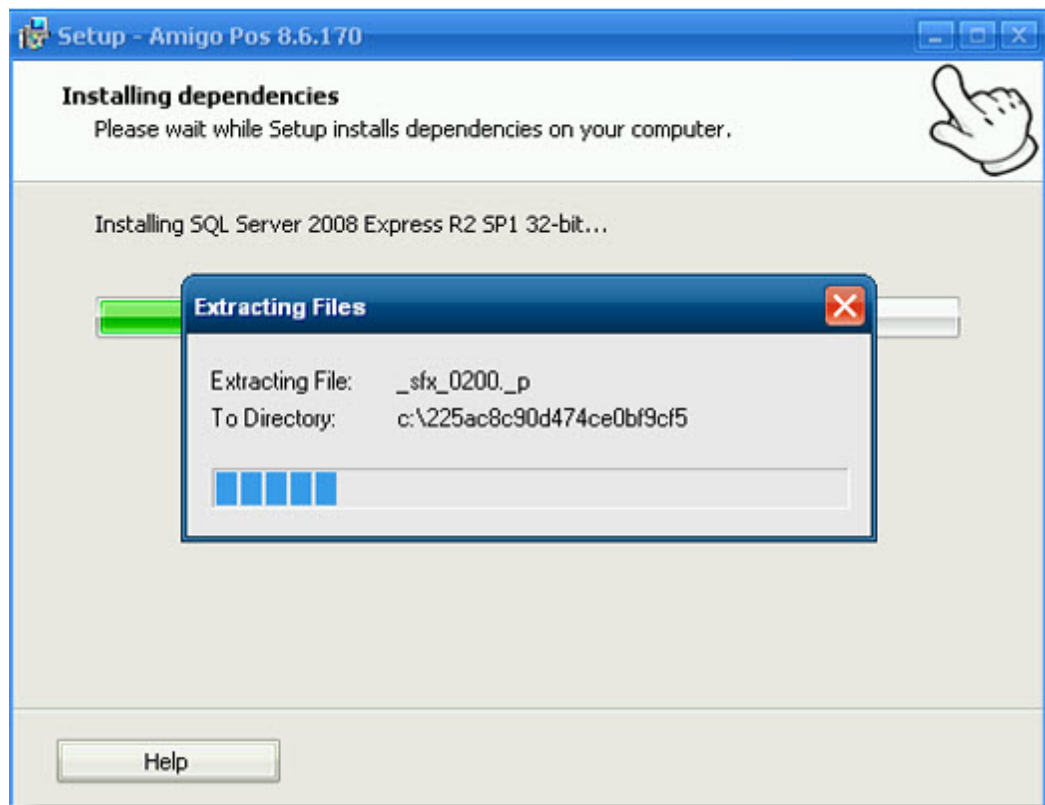
#### Installing Amigo Pos Program Files

The download should require less than 5 minutes on pos stations with a broadband internet connection. If SQL Server Management Studio was selected, the download will take considerably longer, depending on the operating system.



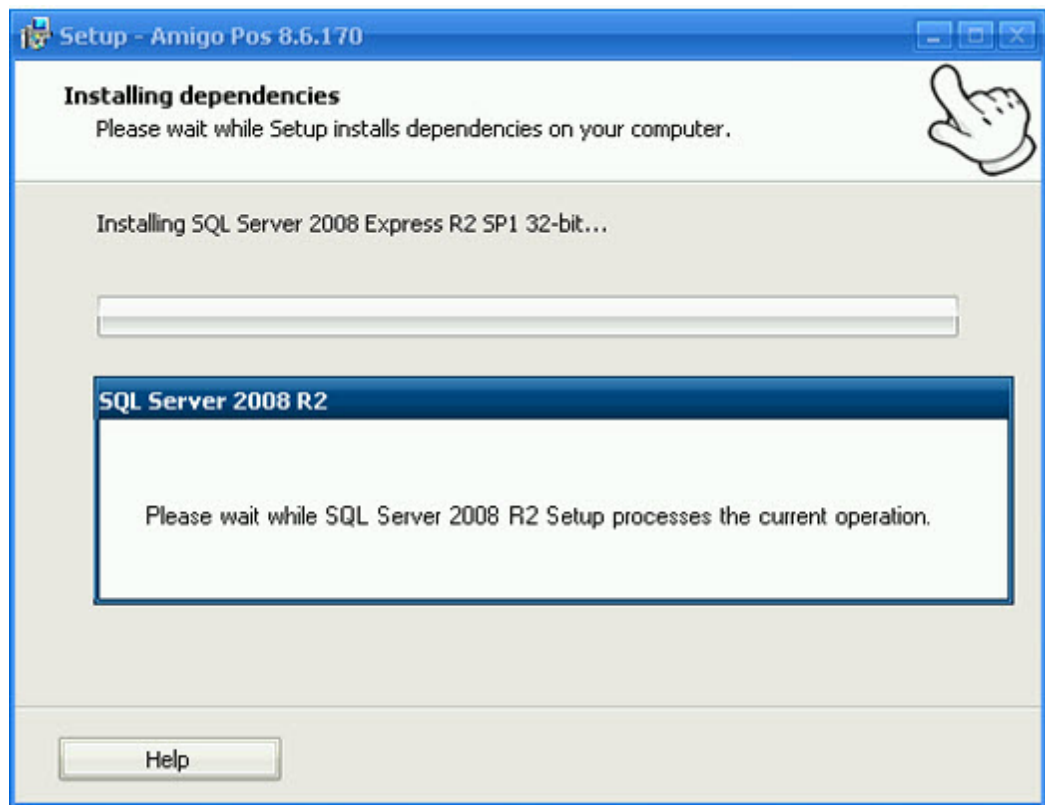
#### Download Progress

The SQL Server Express setup files are extracted to a temporary folder after the download is complete.



**Extracting SQL Server Express Setup Files**

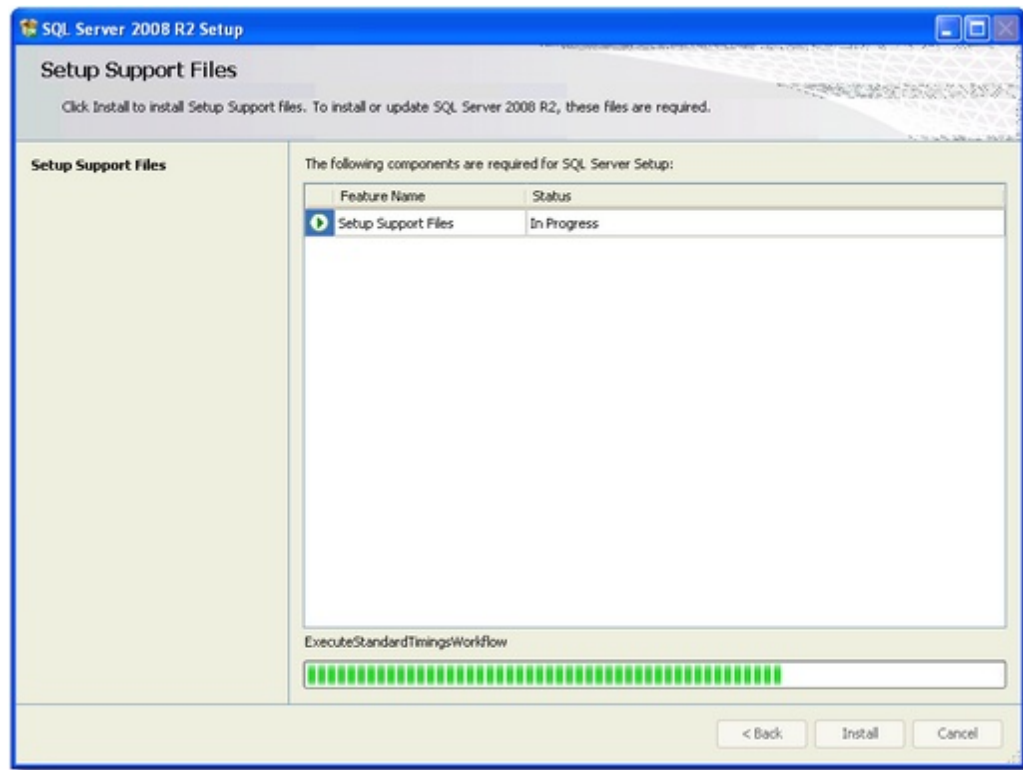
SQL Server Express setup will begin after the files are extracted.



#### Initializing SQL Server Express Setup

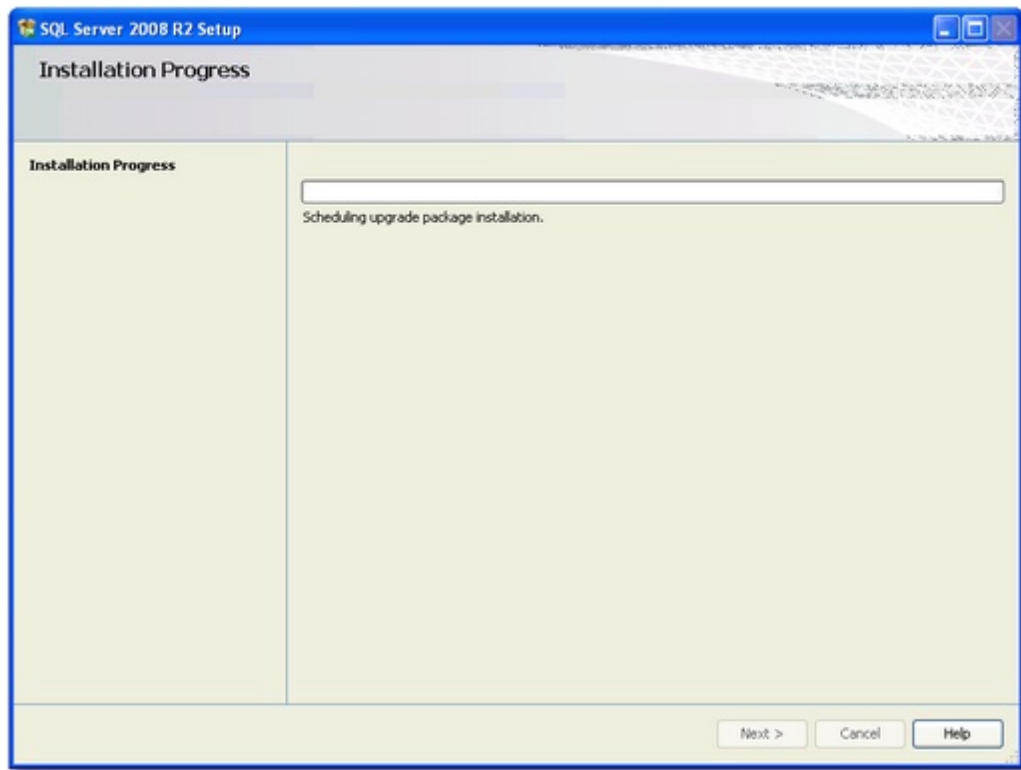
SQL Server Express setup installs preliminary support files before the setup is started.





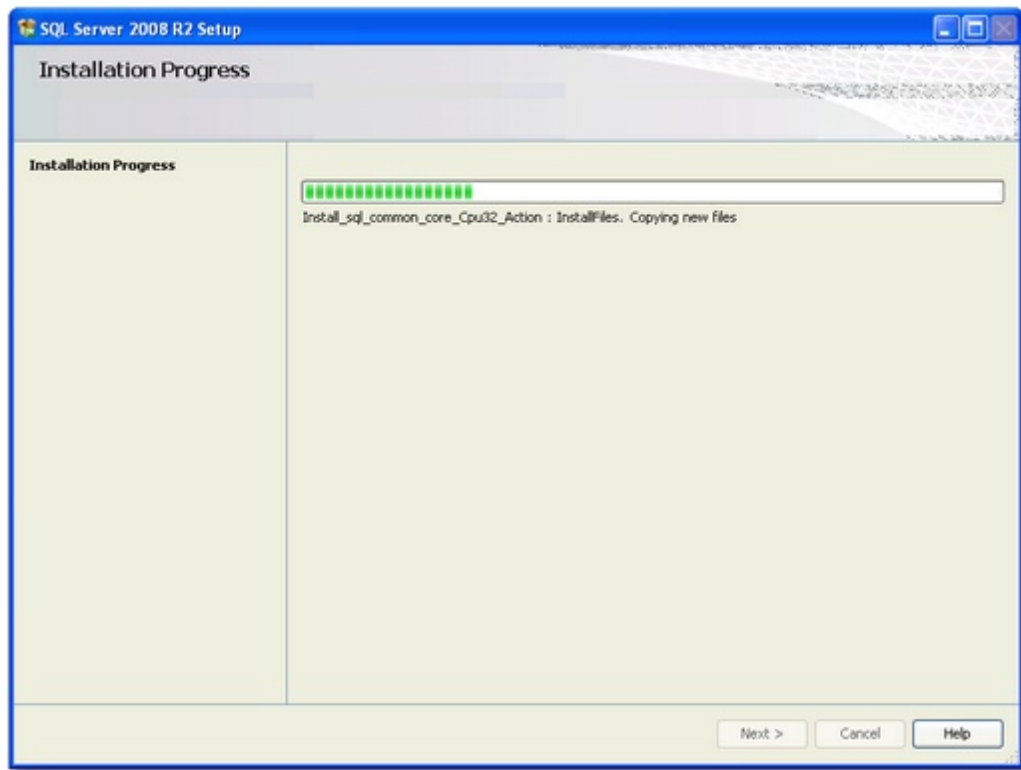
### SQL Server Express Setup Prerequisites Installation

The SQL Server Express setup will start after the preliminary files are installed. No user action is required.



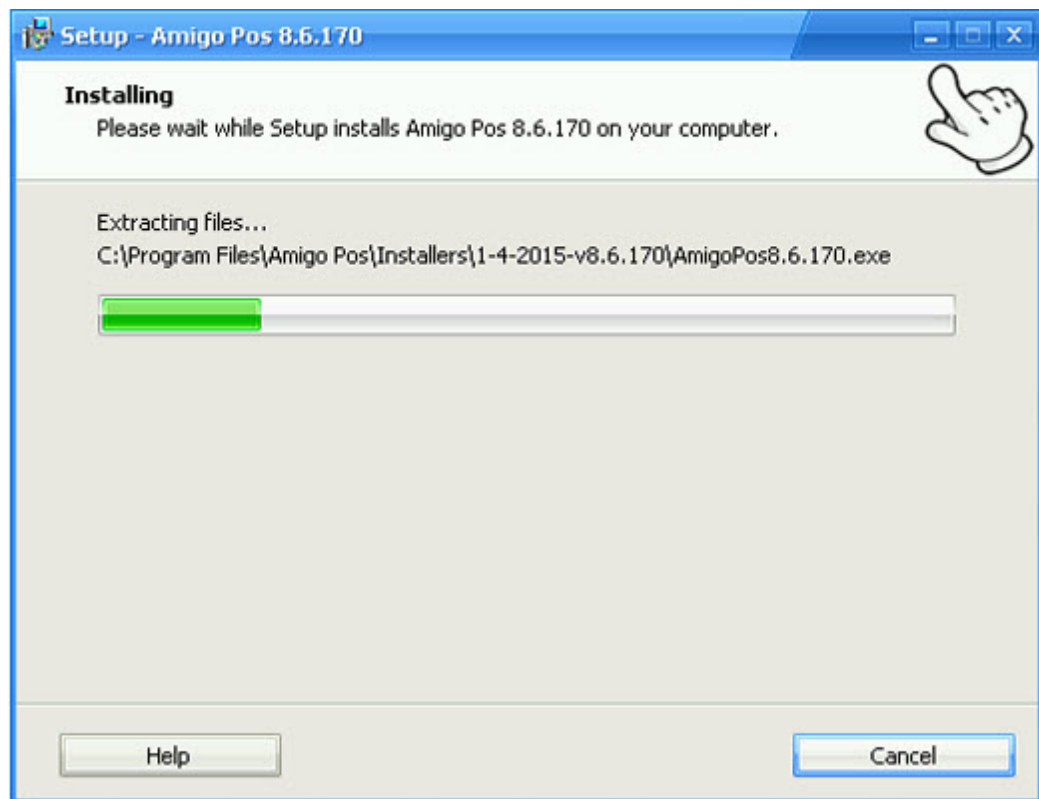
### SQL Server Express Installation Started

Installation progress is displayed on-screen. The typical installation should require no more than 10 minutes, depending on processor speed and available memory. No user action is required.



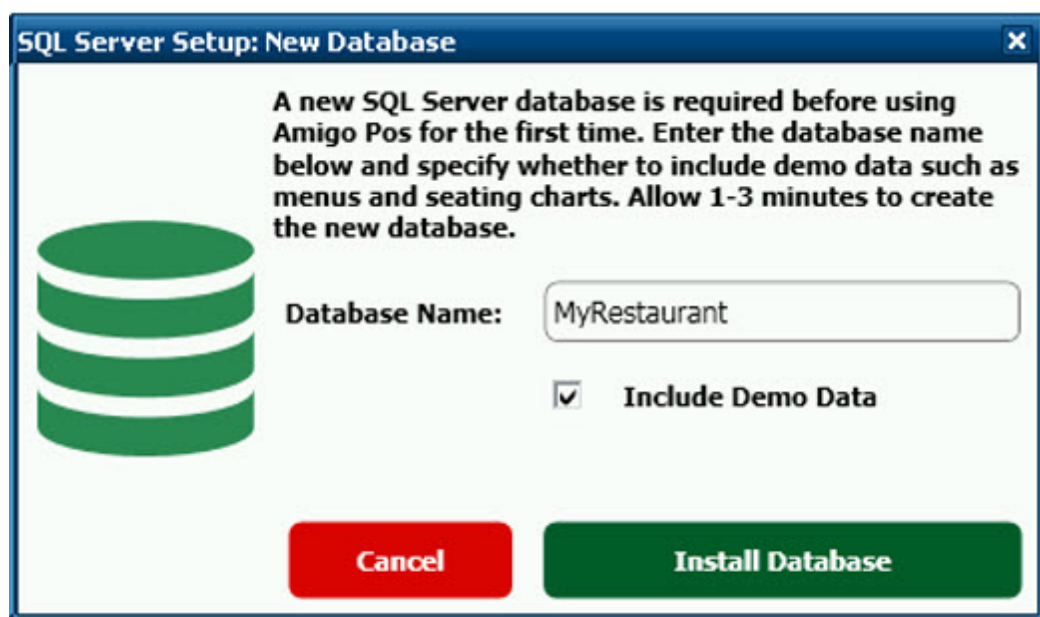
**SQL Server Express Installation Progress**

The AmigoPOS program files are copied to the program installation directory after SQL Server Express is installed.



#### Installing Amigo Pos Program Files

After AmigoPOS is installed, reboot the pos station and start AmigoPOS. A prompt will appear to create a new database. Enter a database name (for example, enter the business name) and click Install Database to continue. If required, check the box to include demo data such as demonstration menus and employees. Creating a new database requires less than 1 minute on most pos stations. AmigoPOS will start automatically after the new database is created. Note that a new database can be created at any time in **Back Office>Settings>Database Settings**.

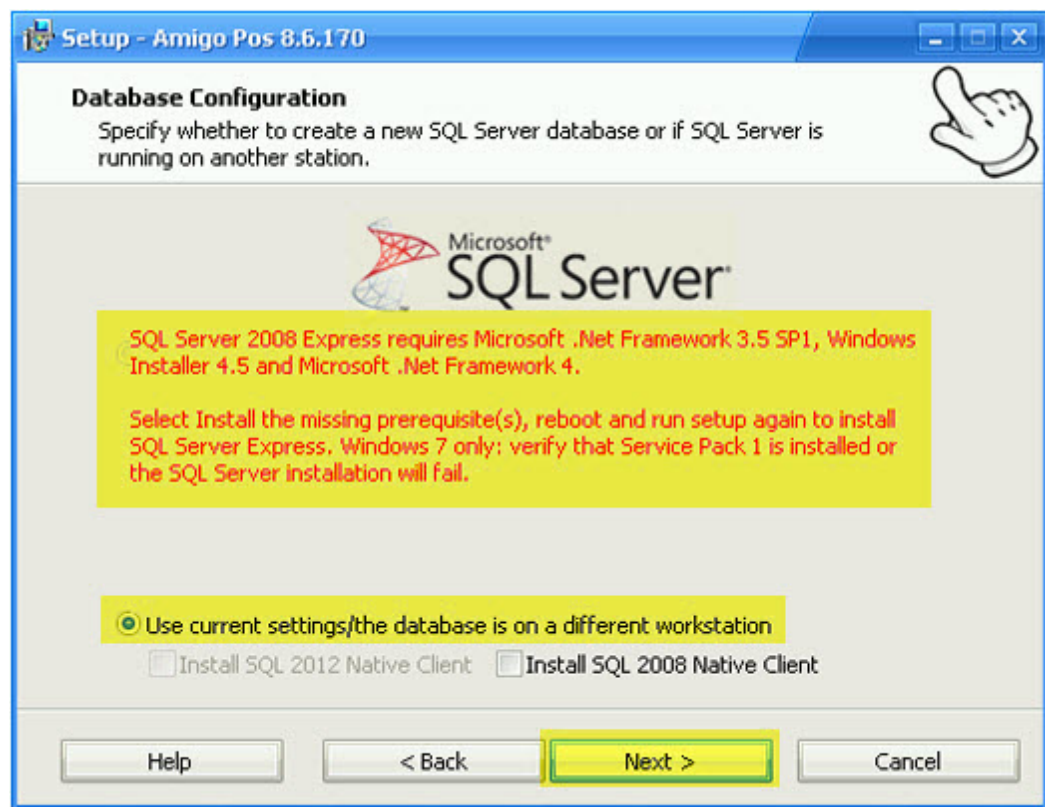


New SQL Server Express Database Prompt

### 3.2.1.2 Prerequisites

#### Prerequisites

Windows 8 ships with the necessary prerequisites for SQL Server 2012. Windows 7 and PosReady 7 users must verify that Microsoft .Net Framework 4 is installed. If not, either install the [Microsoft .Net Framework 4](#) separately or run the AmigoPOS installer with the "Use a database on a different workstation" selected so that the Microsoft .Net Framework 4 is downloaded and installed, **reboot** and then run the installer again and select the "New SQL Server Database option".

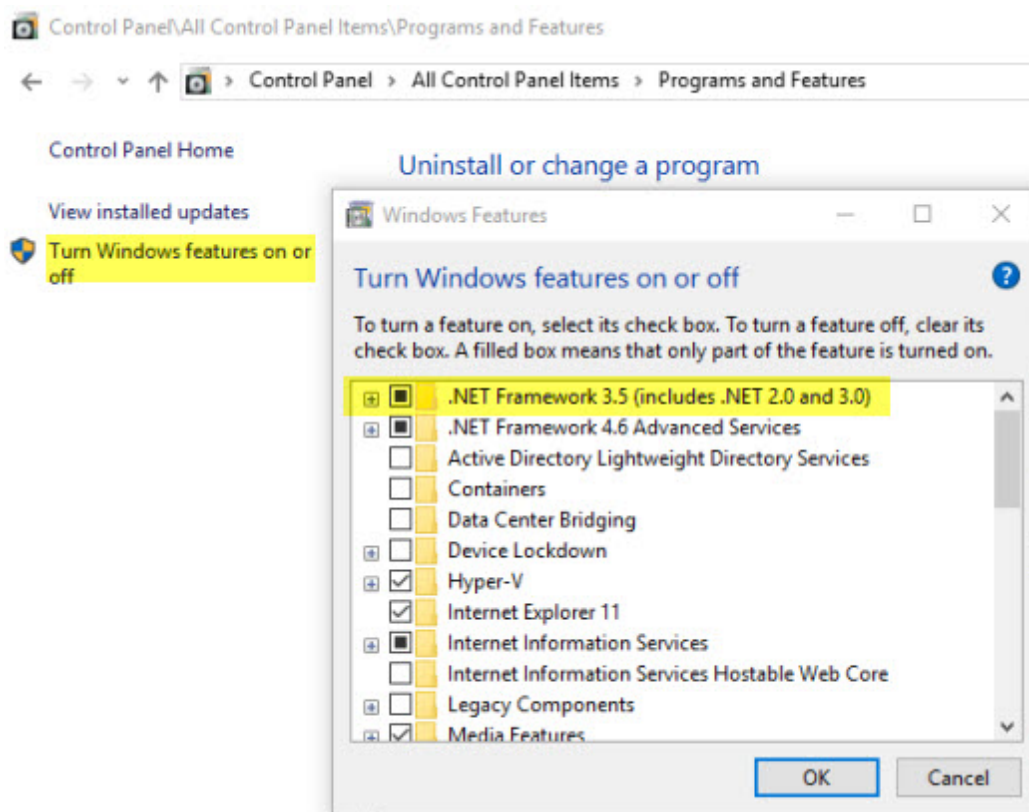


**MS SQL Server is disabled until prerequisites are installed**

#### **Microsoft .Net Framework 3.5 SP1**

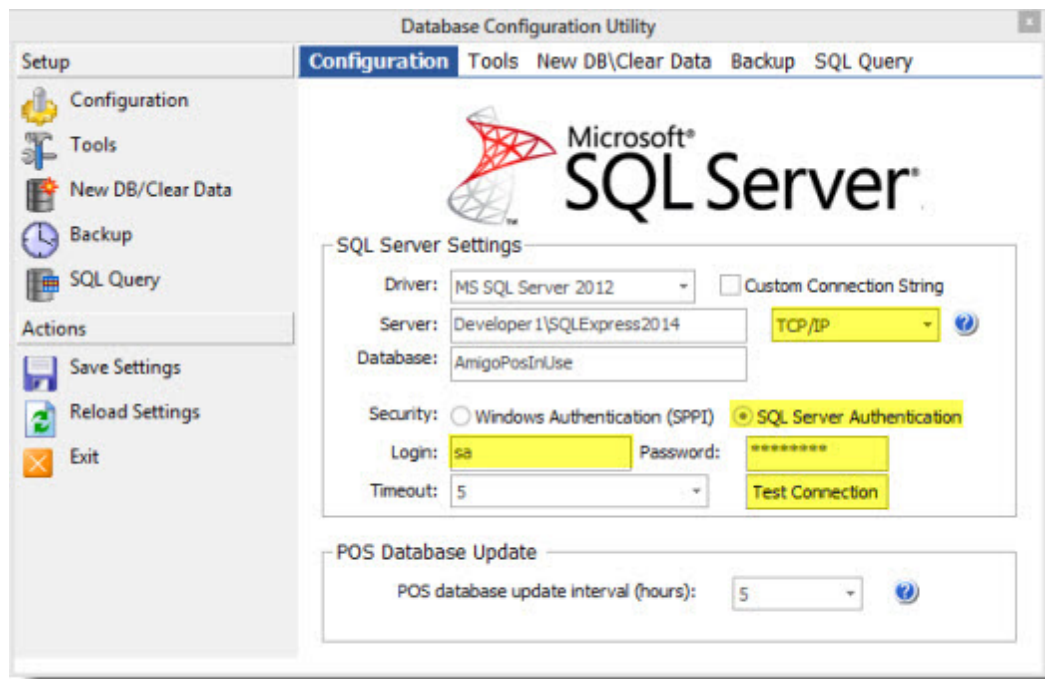
In order to simplify the installation process, the option to install MS SQL Server is enabled only if Microsoft .Net Framework 3.5 SP1 is installed on the workstation. If .Net Framework 3.5 SP1 is not installed, shut down the AmigoPOS installer, download and install Microsoft .Net Framework 3.5 SP1, reboot and run setup again. Note that **the workstation must be rebooted** after installing Microsoft .Net Framework 3.5 SP1, even if not prompted to do so, or the MS SQL Server installation will fail. The image below displays the Windows 10 Windows features list after Microsoft .Net Framework 3.5 SP1 has been successfully enabled on the workstation.

[Microsoft .Net Framework 3.5 SP1](#) (Bootstrapper) (requires internet access while installation is in progress)  
or  
[Microsoft .Net Framework 3.5 SP1](#) (Full Package) (does not require internet access to run installer)



### 3.2.1.3 Client Stations

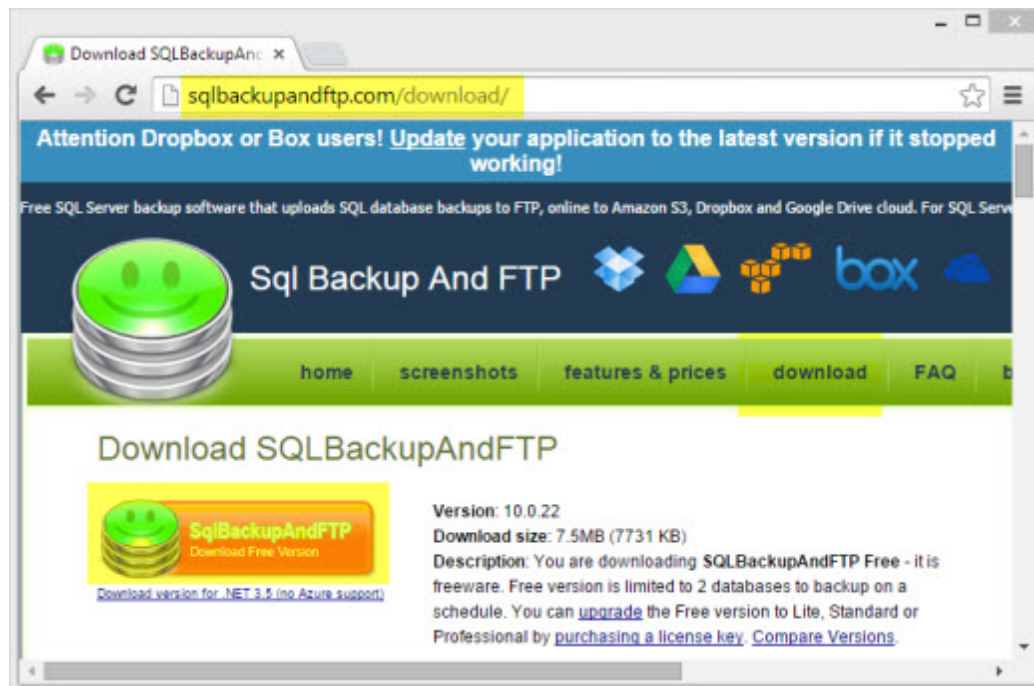
This topic applies to workstations where the SQL Server Express database server is **not installed**. After installing Microsoft® SQL Server® 2012 Native Client on each workstation where SQL Server is not installed, as described in the previous topic, open the database configuration utility. Enter the server name and instance separated by a backslash. Enter the database name. Select SQL Server Authentication and enter the log (sa) and the password that was entered when AmigoPOS was installed on the pos station running SQL Server Express. **All settings are the same as on the pos station where the SQL Server Express database engine is installed.** Click Test to save the settings and verify connectivity.



**Windows 7 client connecting to SQL Server running on Windows XP using TCP/IP Protocol**

#### 3.2.1.4 Database Backup

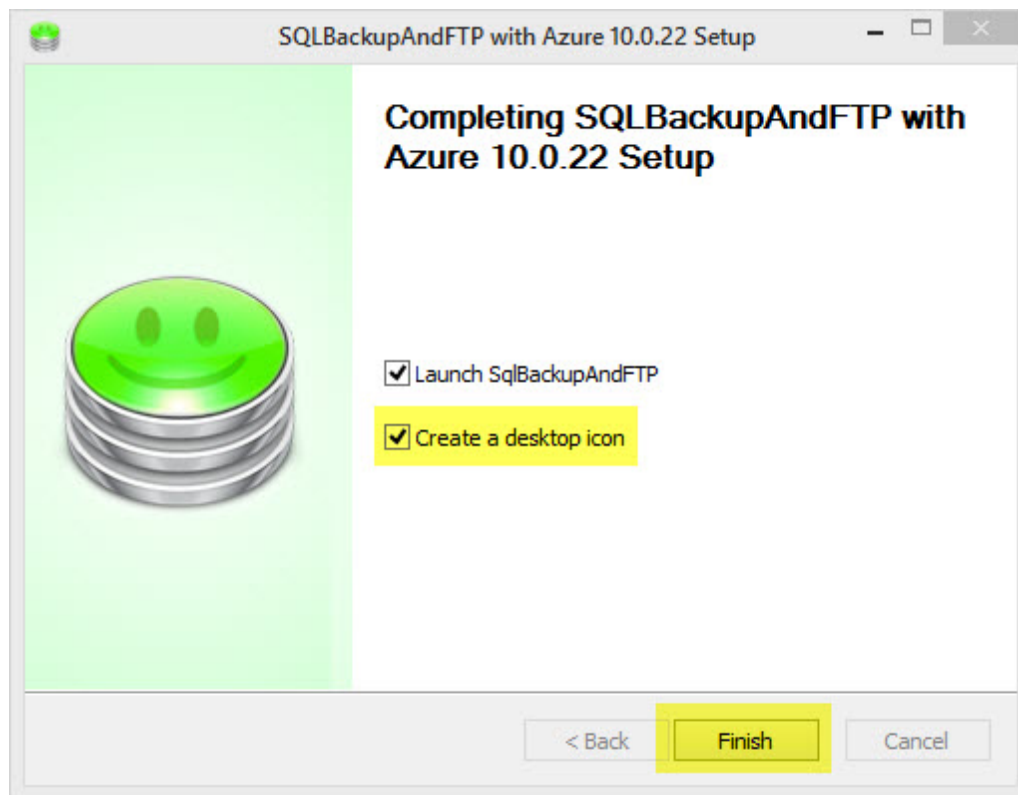
A freeware application is available to automatically backup and restore your SQL Server Express database in the event of failure. Download and install SQL Backup and FTP on the pos station running SQL Server from <http://sqlbackupandftp.com> using the default installer settings.



**sqlbackupandftp.com download page**

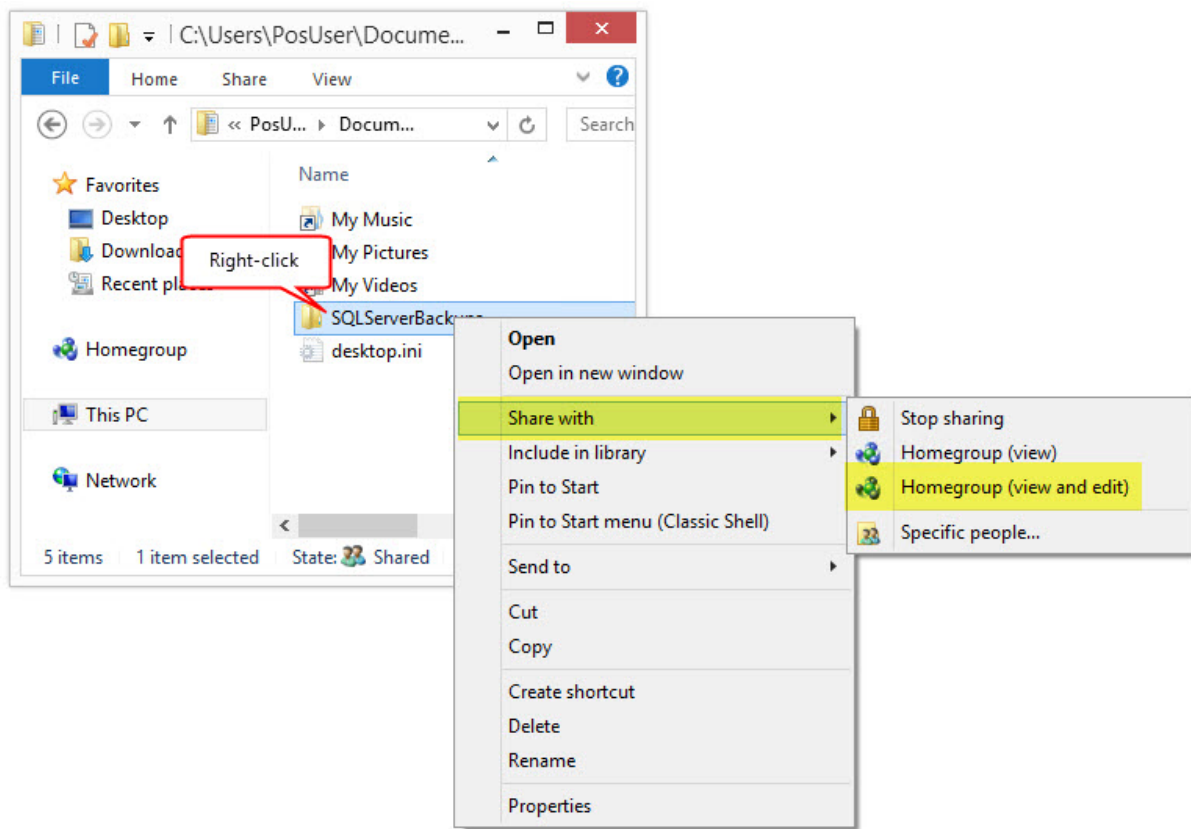


Download and run the SQLBackupAndFTP installer on the main pos station (where the SQL Server Express is installed). Proceed with the default settings. On the final screen check the box to create a desktop icon for easy access.



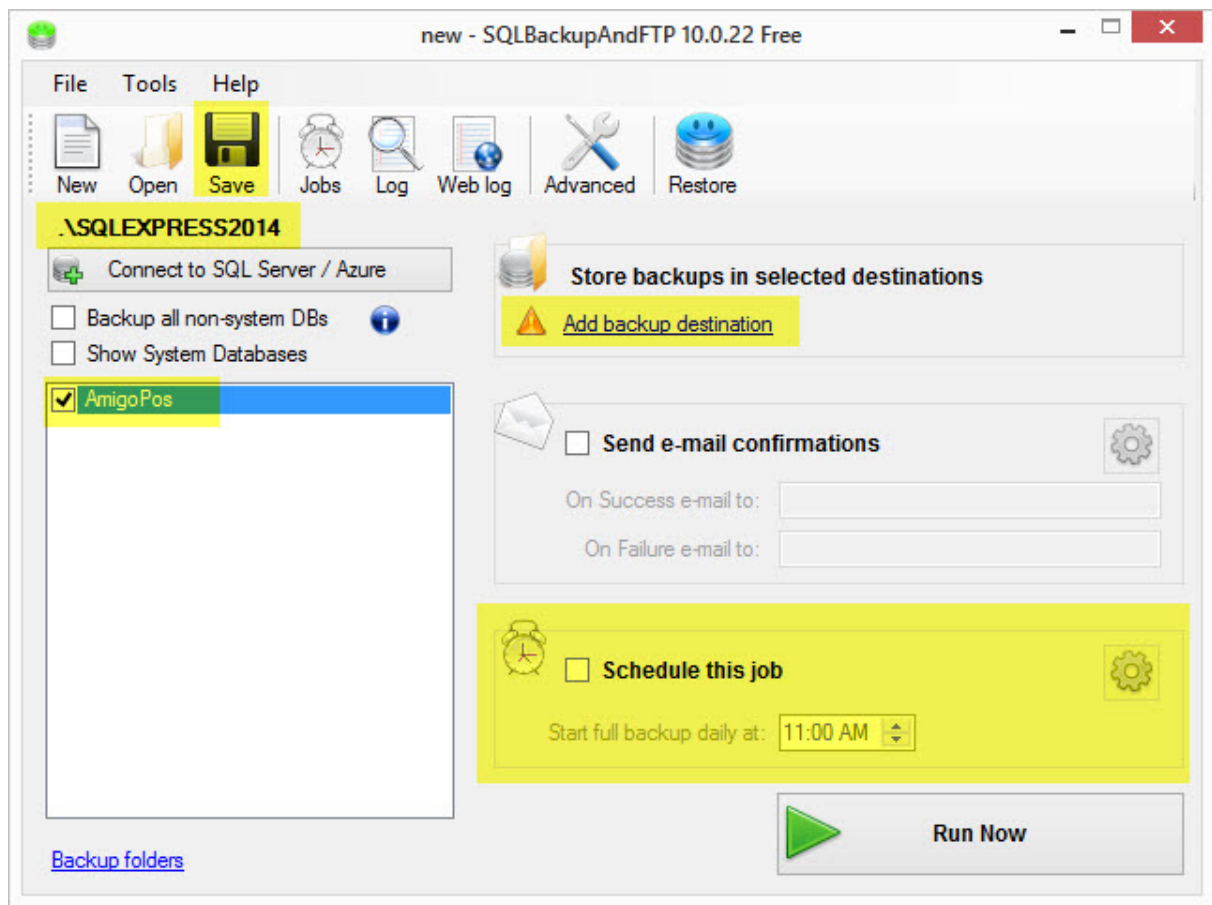
**SQLBackupAndFTP Installation Complete**

Create a backup destination on a different computer. In this example a backup folder named SQLServerBackups is created at STATION2. The folder is in the user/documents folder and can be shared with other Homegroup users by right-clicking on the folder and selecting **Share with > Homegroup (view and edit)**. For users with a single pos station, use a USB thumb drive or other removable media. Backing up to the same hard drive that stores the database is not recommended in case of disk failure.



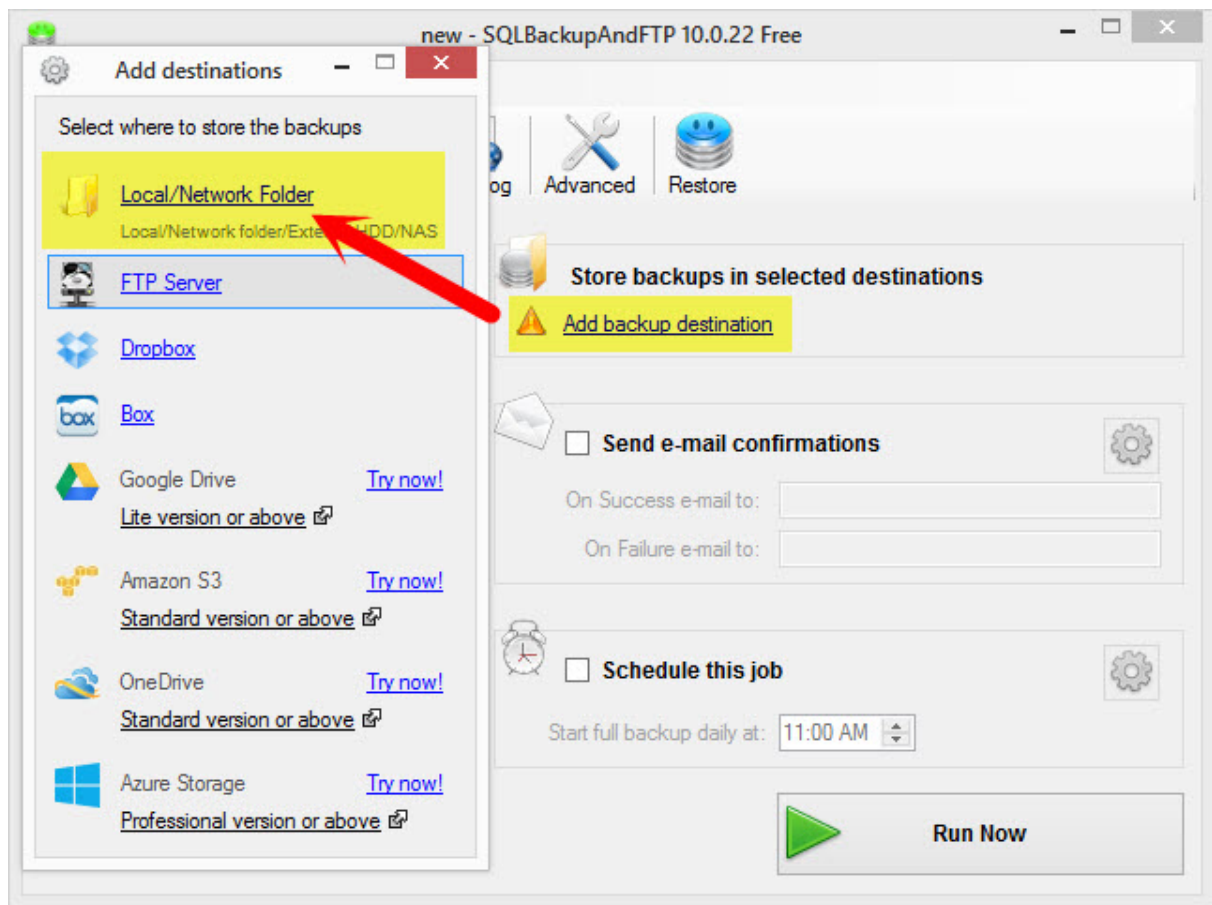
#### Share the backup folder on STATION2

Run SQLBackupAndFTP from the desktop shortcut on STATION1 and verify that the SQL Server Express instance is displayed with the AmigoPOS database. If the correct SQL Server Express instance is not shown, click the Connect to SQL Server/Azure button to browse for the server instance that contains the AmigoPOS database. Check the box next to the AmigoPOS database and click Add backup destination.



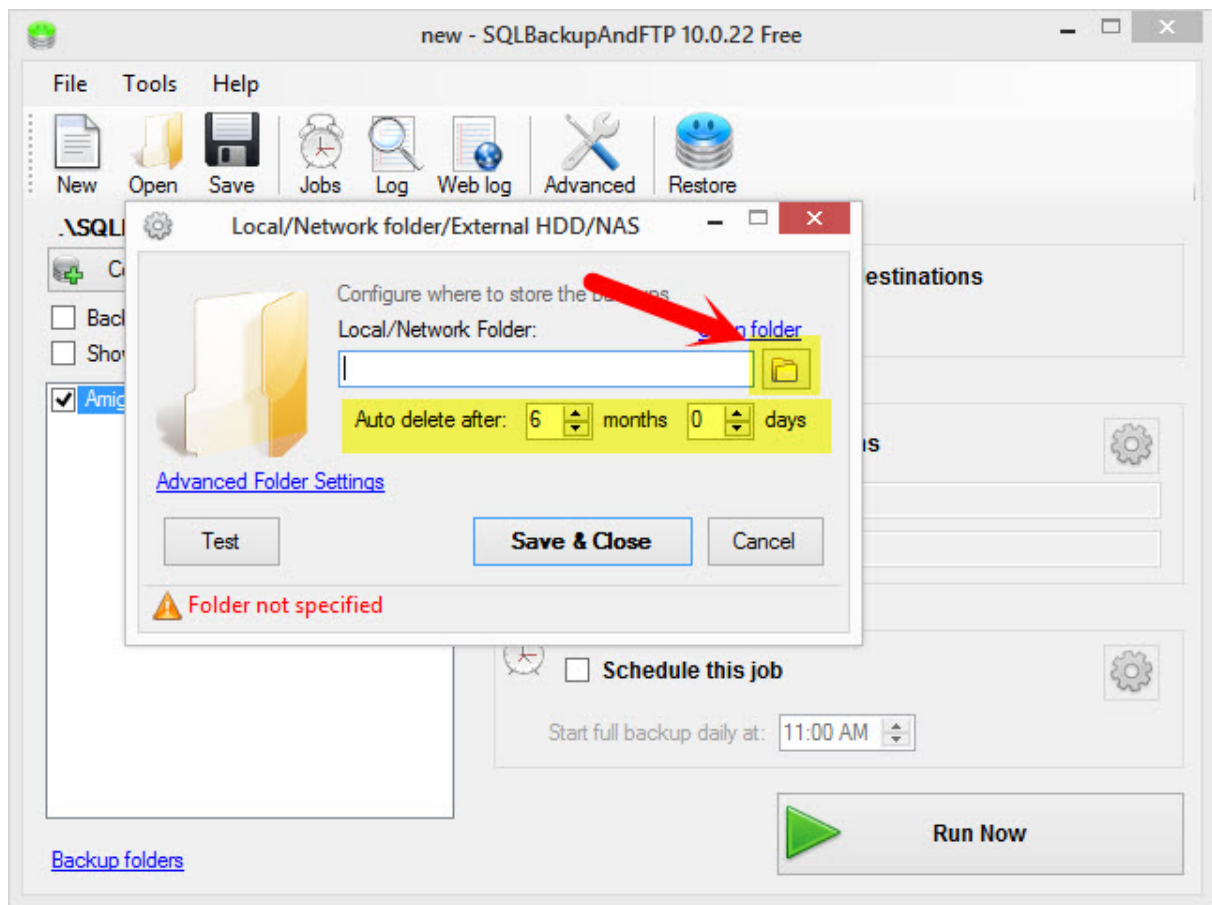
SQLBackupAndFTP Main Screen

In the backup destinations windows, click Local/Network Folder to browse for the folder that is shared on STATION2.



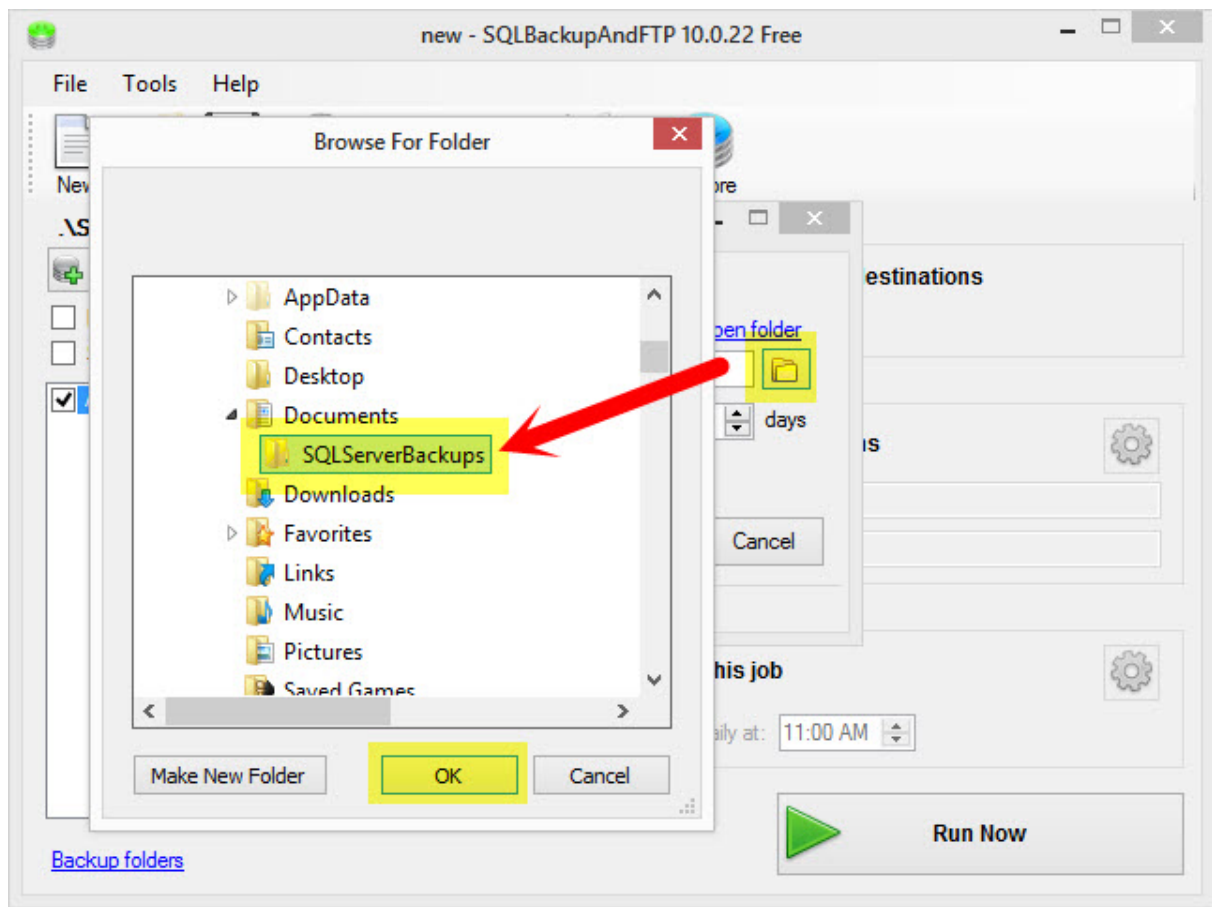
**SQLBackupAndFTP Add Destination Folder**

Click the folder icon to browse for the shared folder. Note that the backups can be auto-deleted after a predefined interval to save disk space.



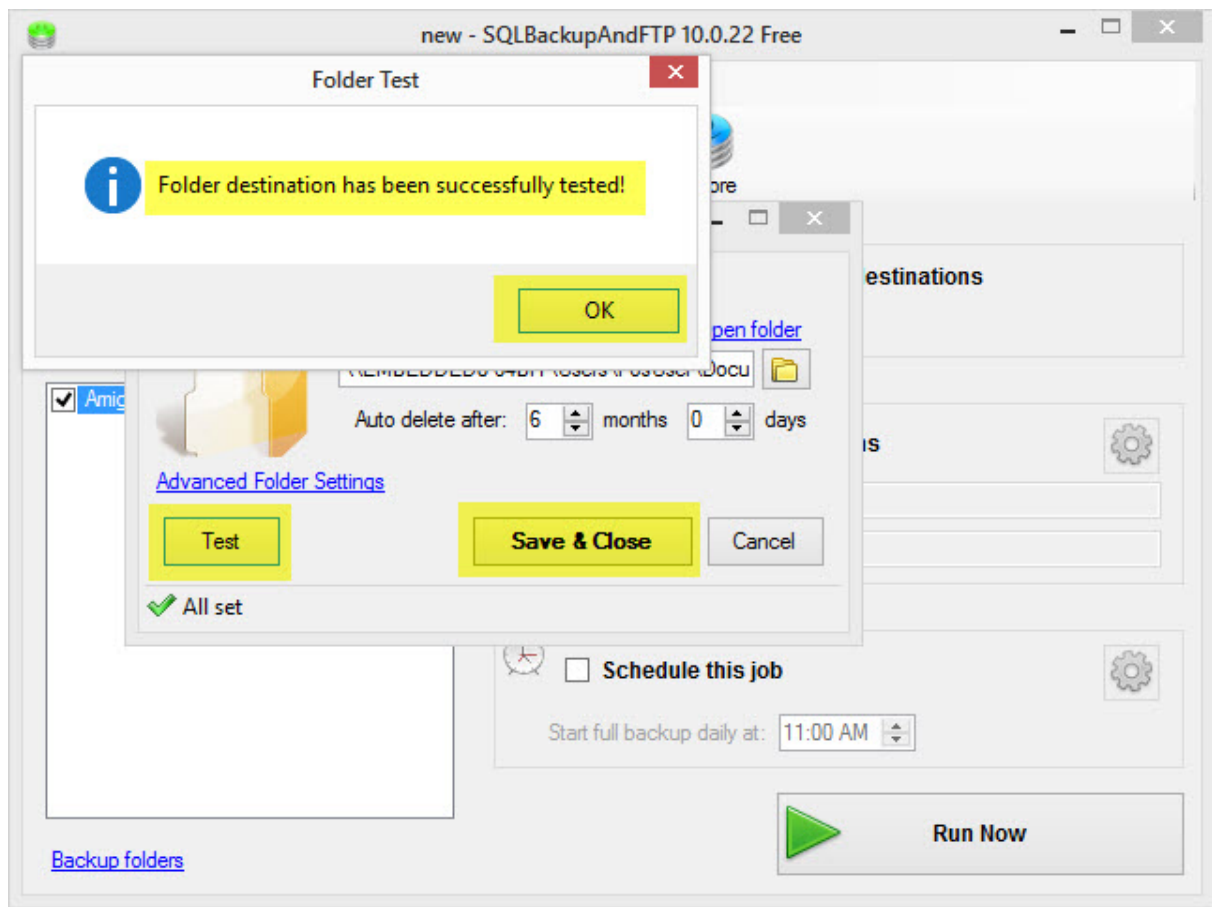
#### SQLBackupAndFTP Browse for Destination Folder

Expand the directories and locate the shared folder on STATION2. Select the folder and click OK.

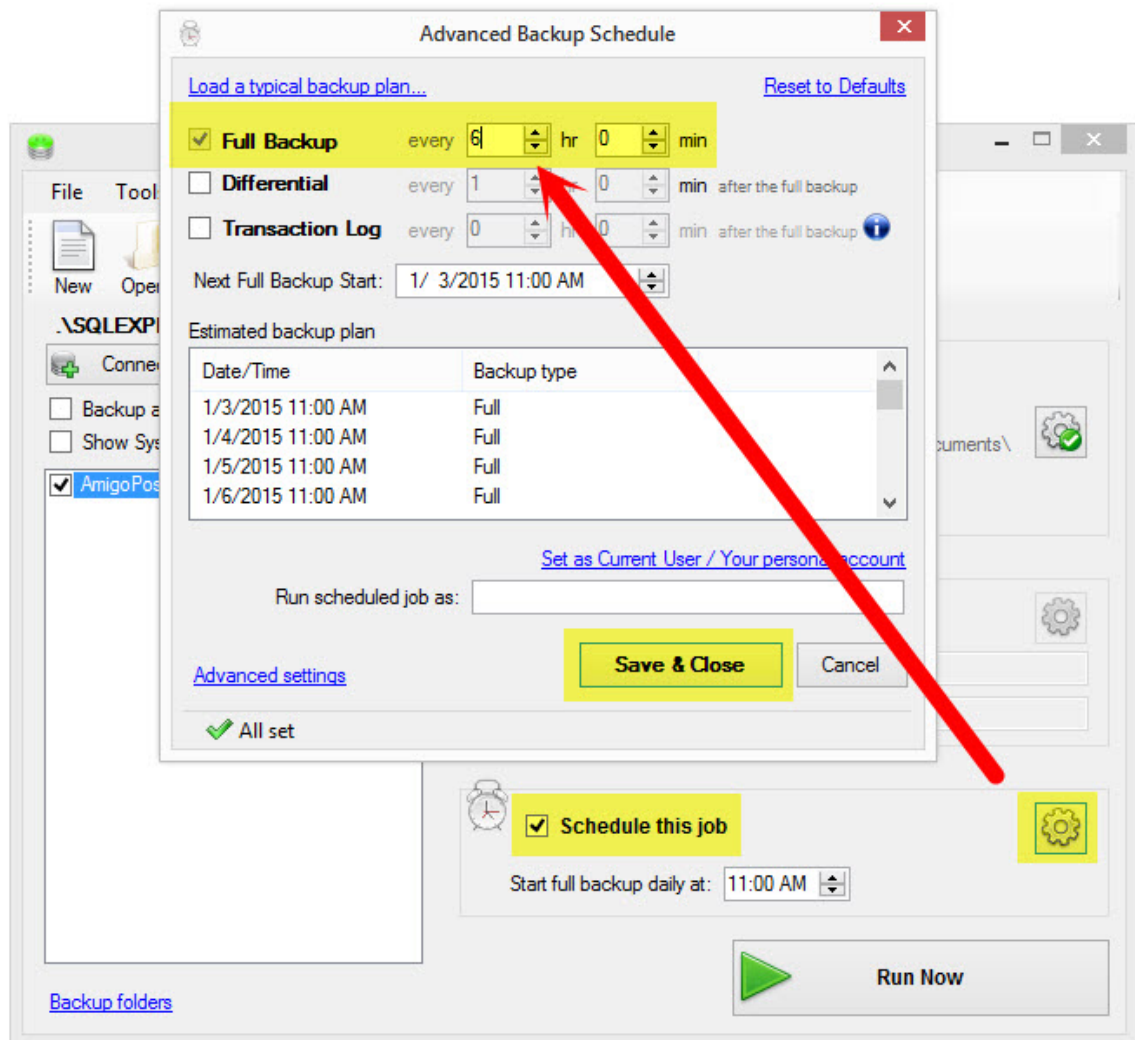


**Browse for Folder**

Click the Test button to verify that STATION1 has sufficient permissions to write to the backup folder on STATION2. Click OK followed by Save & Close to return to the main screen.



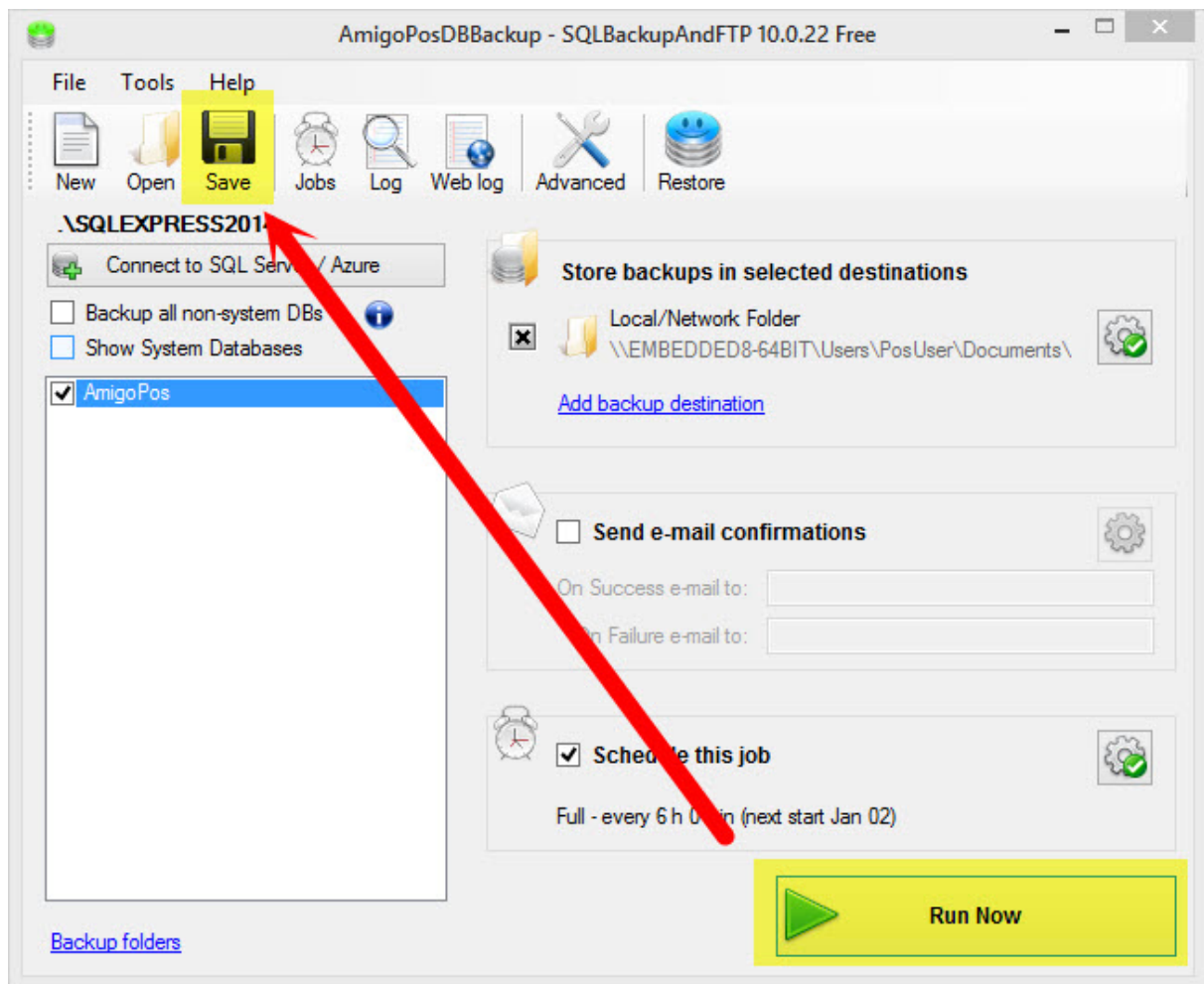
Check the box next to Schedule this job and select the backup interval. The example below is set to backup the database every 6 hours. Click Save & Close.



**SQLBackupAndFTP Backup Schedule**

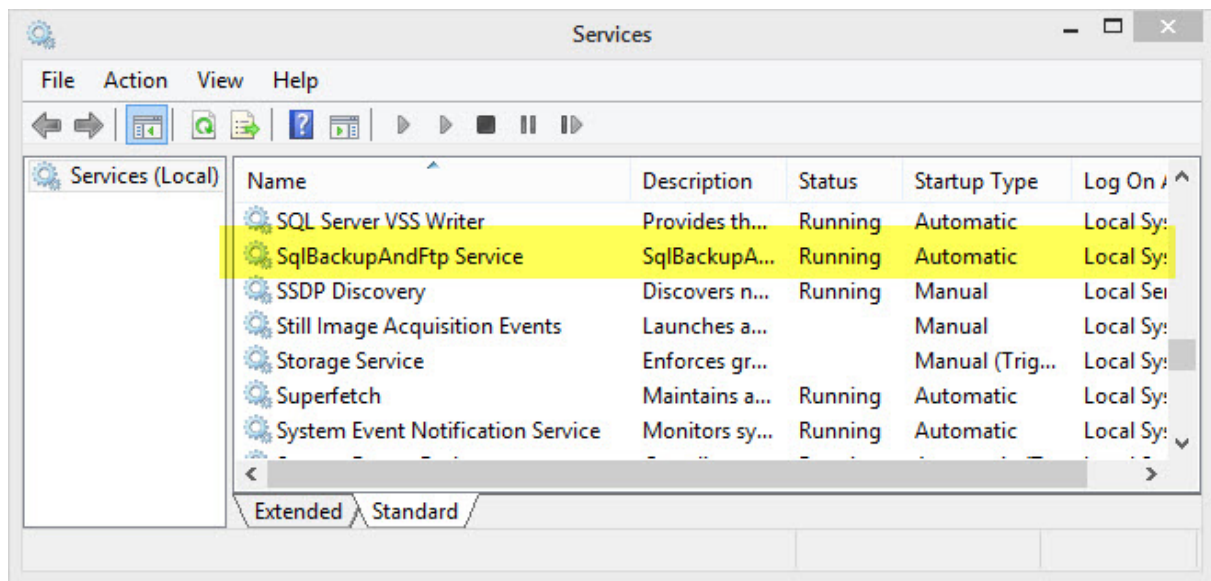
On the main screen click Run Now to verify that the backup is created correctly. Open the destination backup folder on STATION2 and confirm that the backup file exists in the folder. Click Save at the top to save the job to the desktop; a prompt will appear requesting the Windows user name and password. This information is required to run SQLBackupAndFTP as a Windows Service. Blank passwords are not allowed.





SQLBackupAndFTP Main Screen

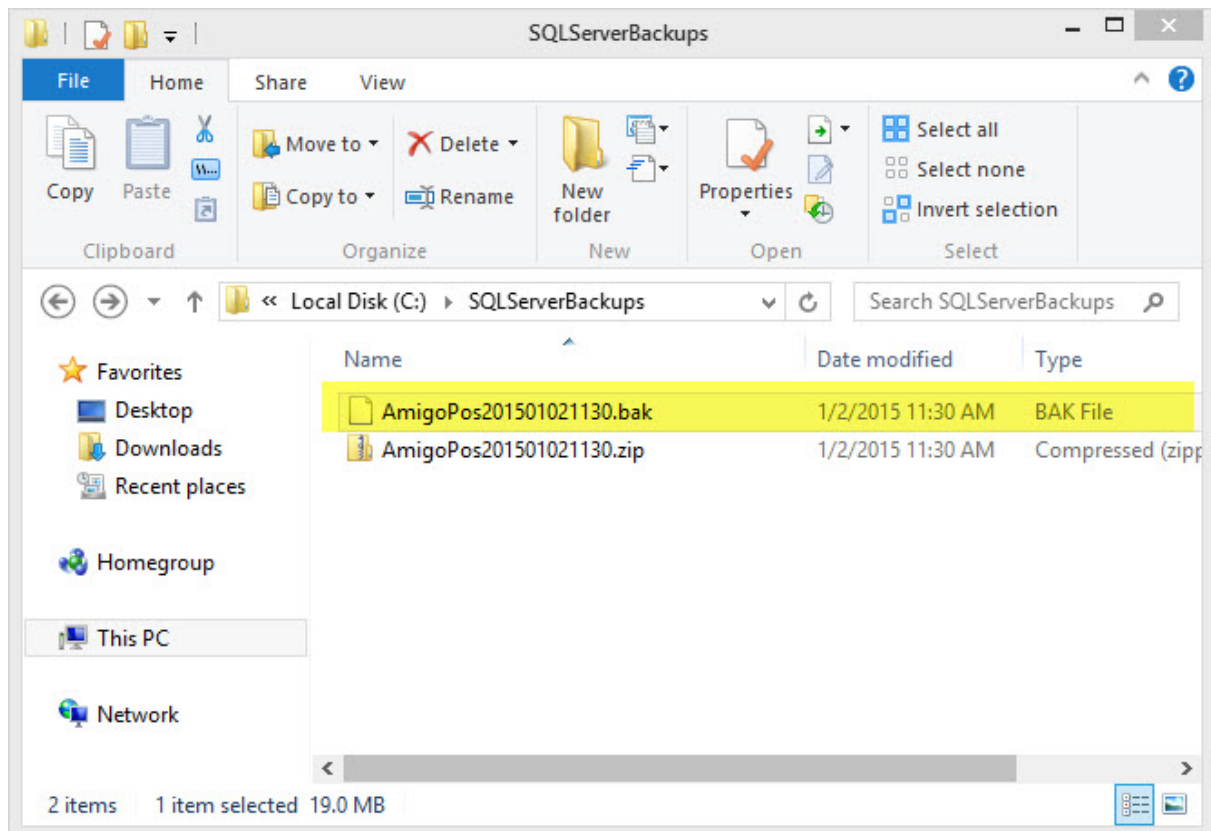
SQLBackupAndFTP runs as a Windows service and can be viewed by running the Windows Control Panel/Administrative Tools/Services applet.



SQLBackupAndFTP Windows Service

### 3.2.1.5 Restore Database

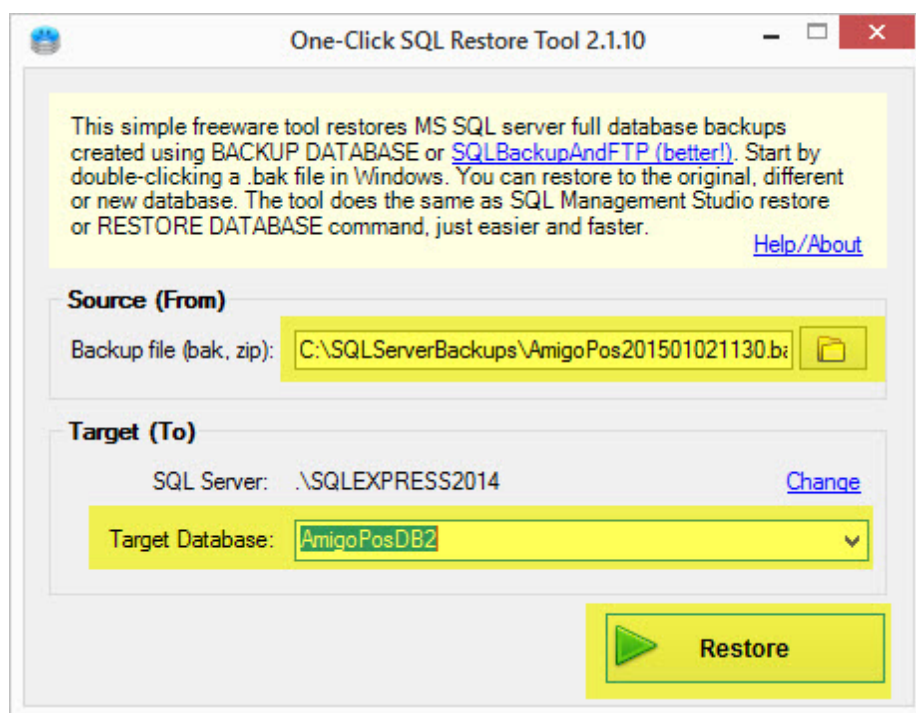
Review the previous topic to install and configure SQLBackupAndFTP on the main pos station. SQLBackupAndFTP offers single-click restore. First locate the zipped backup file in the backup folder and unzip the file. The uncompressed file has the .bak extension.



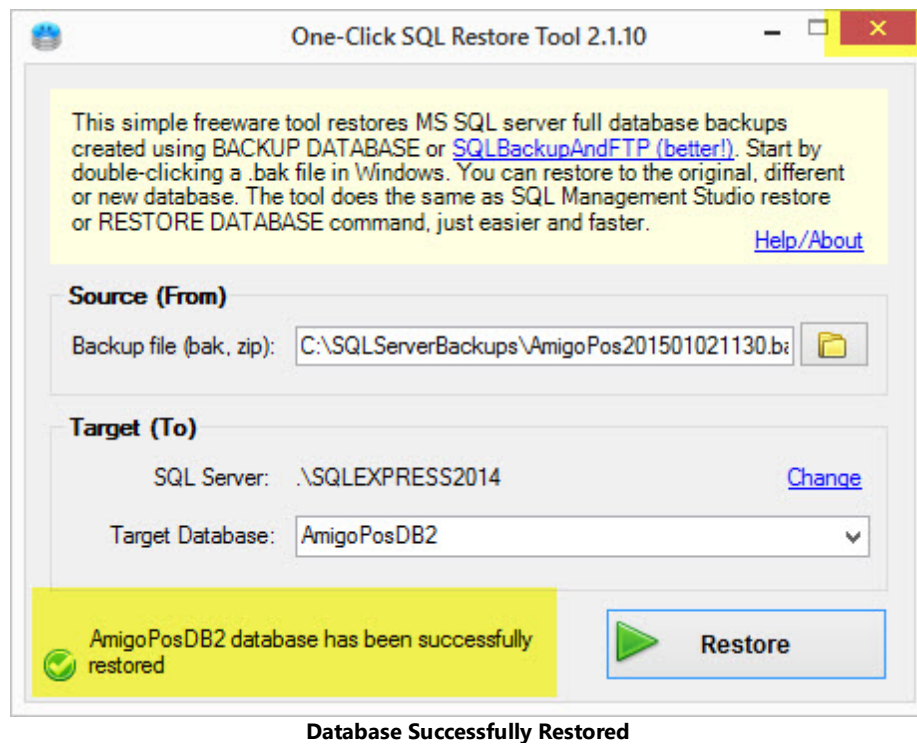
Locate the One-Click SQL Restore shortcut in the SQLBackupAndFTP program group and click to run.



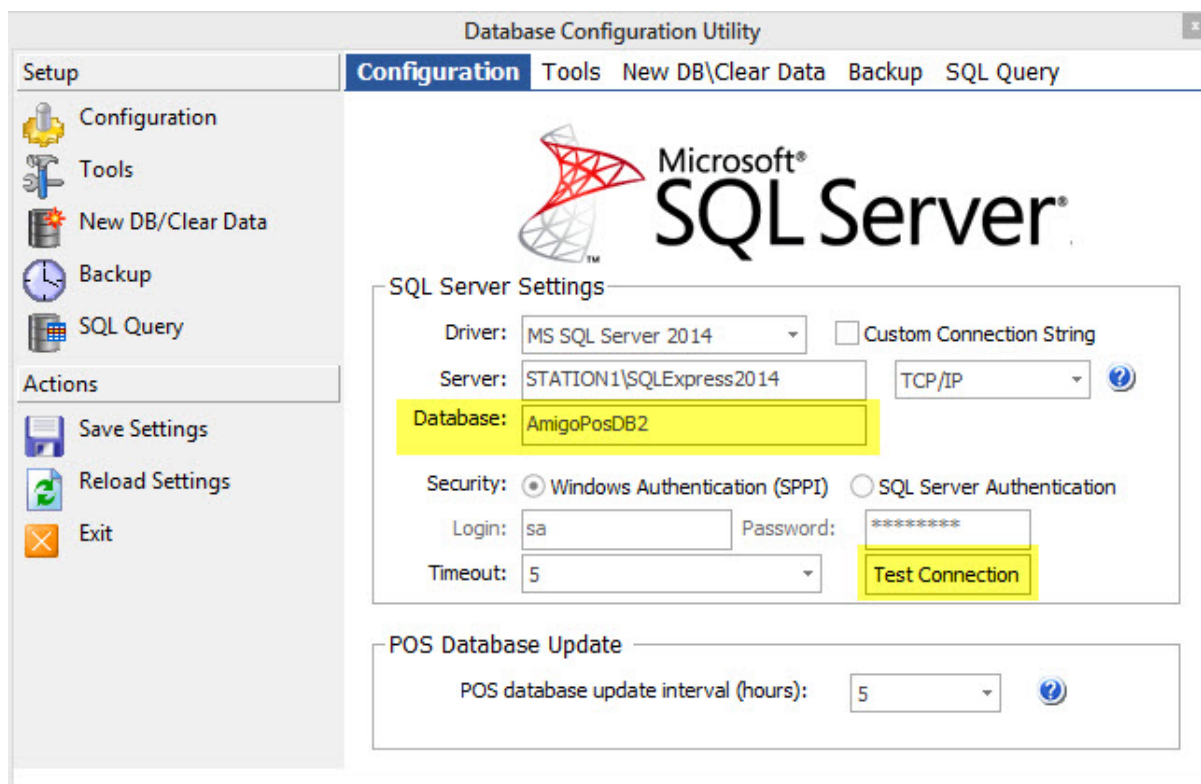
Click the folder icon and browse to the backup folder. Select the backup file and click OK. Verify that the AmigoPOS SQL Server Instance is selected and change the database name to a different database name that has not been used previously. Click Restore.



Review the results at the bottom left to verify that the database has been restored properly and exit the One-Click Restore Application.



Open the AmigoPOS Database Configuration Utility from the desktop shortcut and change the database name to the new name entered above. Click Test to save the settings and check the database connection.



Amigo Pos Database Configuration Utility

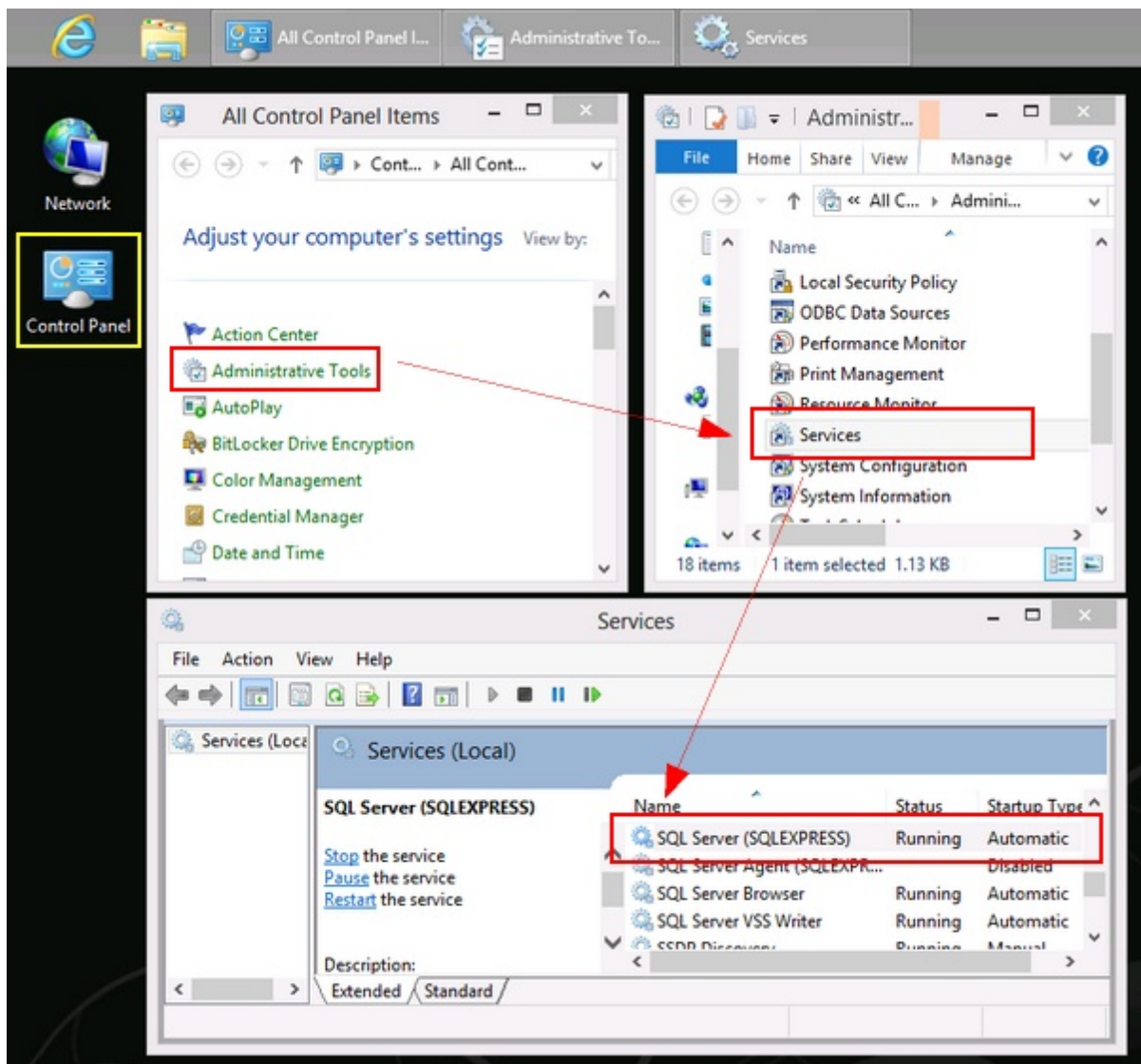
### 3.2.1.6 Troubleshooting

AmigoPOS will attempt to connect to SQL Server at program startup. If the connection fails, the Connection Error message will appear as shown below. Click Retry and complete the following steps in order.

1. [Verify that the SQL Server Express instance is running](#) <sup>589</sup>
2. [Verify that the firewall exceptions are correct](#) <sup>590</sup>
3. [Verify the TCP Port Setting](#) <sup>591</sup>
4. [Verify that SQL Native Client is installed](#) <sup>593</sup>

#### Verify that the SQL Server Express instance is running

AmigoPOS will stop and restart the service to complete the installation. In some cases (usually on 32-Bit workstations), the service restart may be delayed. Either reboot the workstation or manually check to verify that the service is running in Windows Control Panel (small icon view) > Administrative Tools > Services > SQL Server (SQL Express). The Startup Type should be set to Automatic and the Status should be set to Running. If the service is not running, double-click on the service and click the Start button.

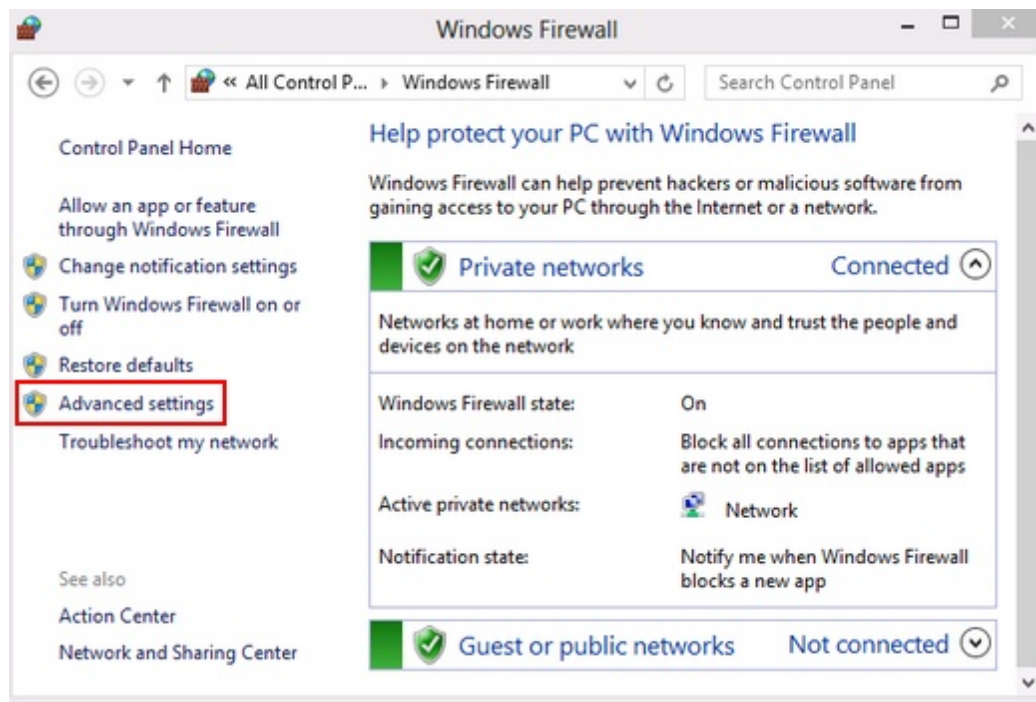


Administrative Tools &gt; Services

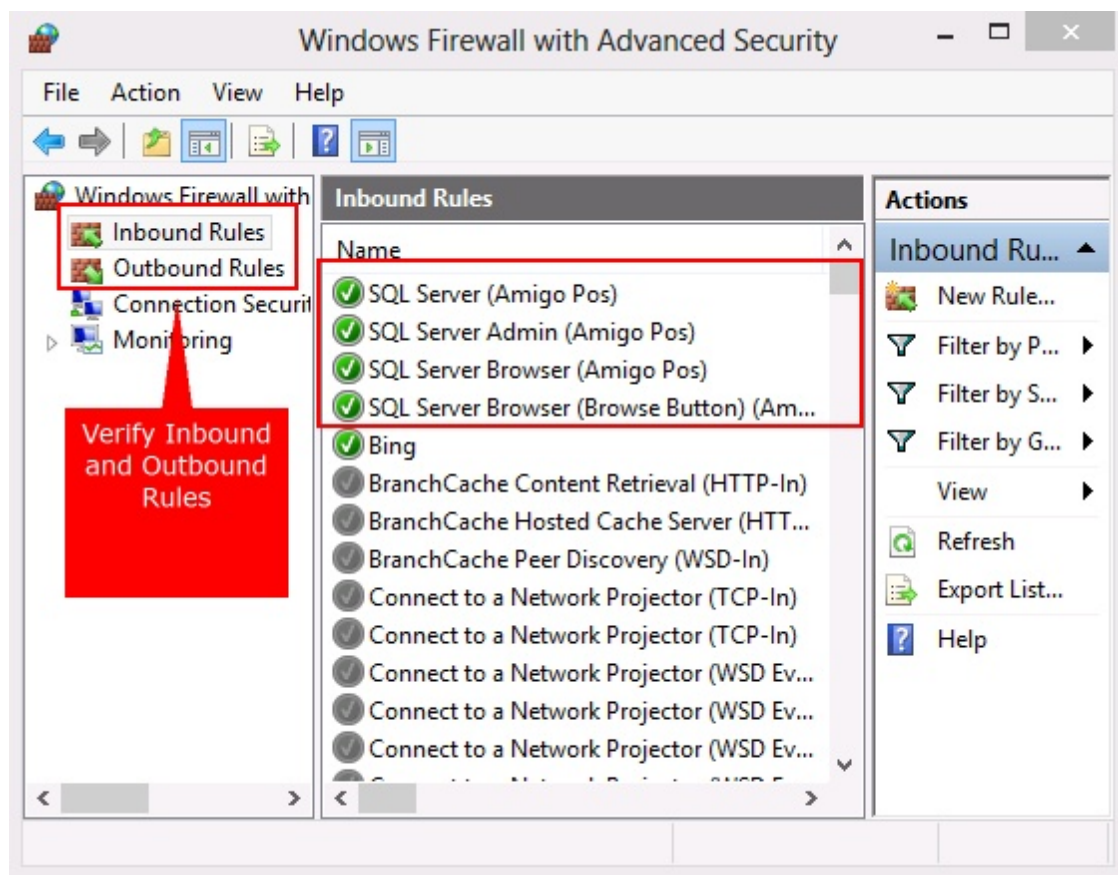
**Verify that the firewall exceptions are correct**

AmigoPOS will attempt to enter the firewall rules during installation. Verify that there are 4 exceptions each for Inbound and Outbound rules, as shown below. If not, manually run the firewall batch file located in the program installation directory (C:\Program Files\Amigo Point Of Sale) by right clicking on the files named OpenSQLServerPort\_xx.bat and selecting Run As Administrator.





Windows Control Panel &gt; Windows Firewall

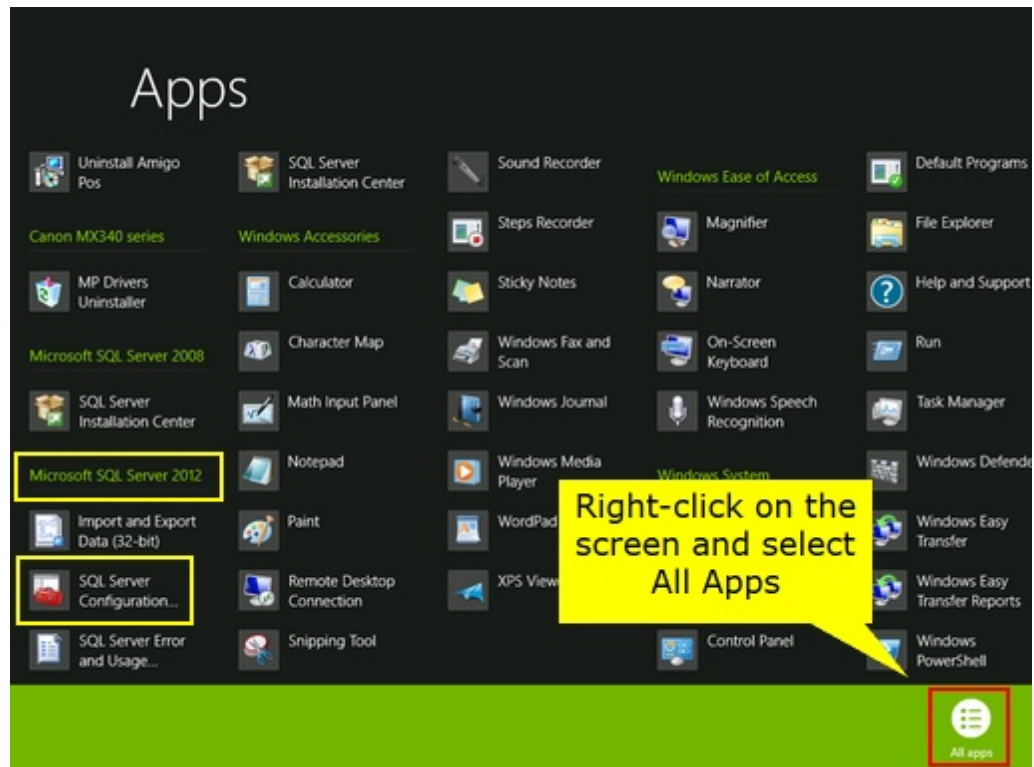


Windows Firewall Advanced Settings

**Verify the TCP Port Setting**

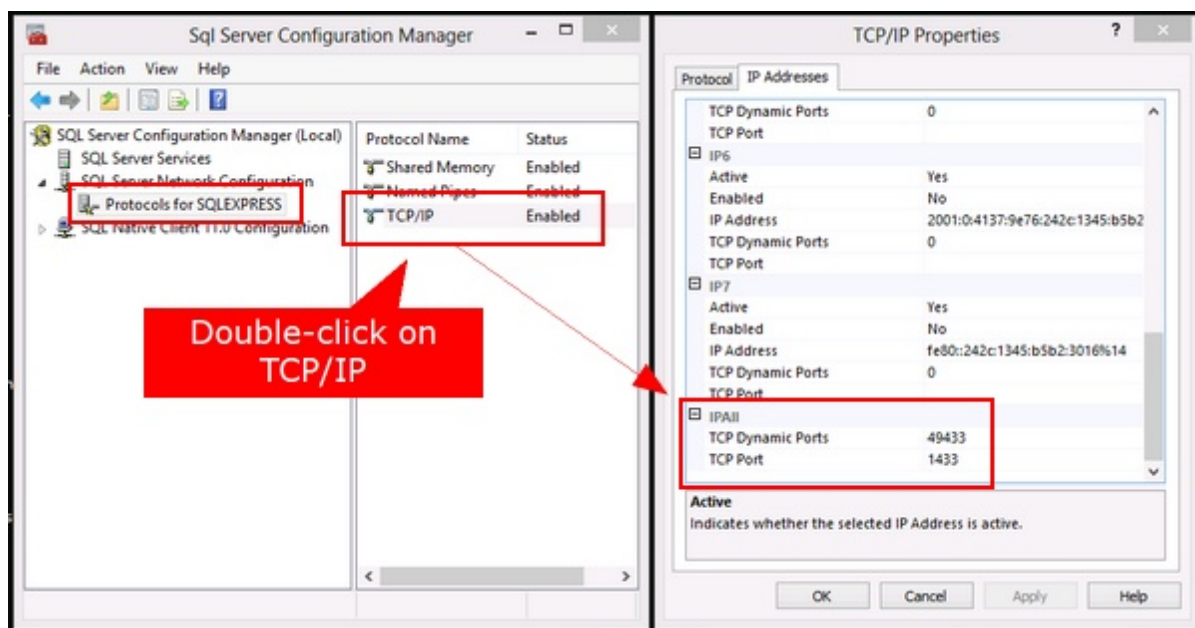
AmigoPOS will attempt to configure SQL Server to use port 1433 during installation. Verify that this setting was applied correctly in the SQL Server Configuration Manager by clicking the shortcut in Windows Start > All Apps > Microsoft SQL Server 2012.

1. Expand SQL Server Network Configuration
2. Select Protocols for SQLEXPRESS
3. Double-click on TCP/IP to open the TCP/IP properties window
4. Click the IP Addresses tab
5. Scroll to the bottom and expand IPAll
6. Verify that the value of the TCP Port setting is 1433
7. Note that SQL Server must be restarted (or the workstation can be rebooted) for changes to take effect.



**Windows Start Screen Showing All Apps**



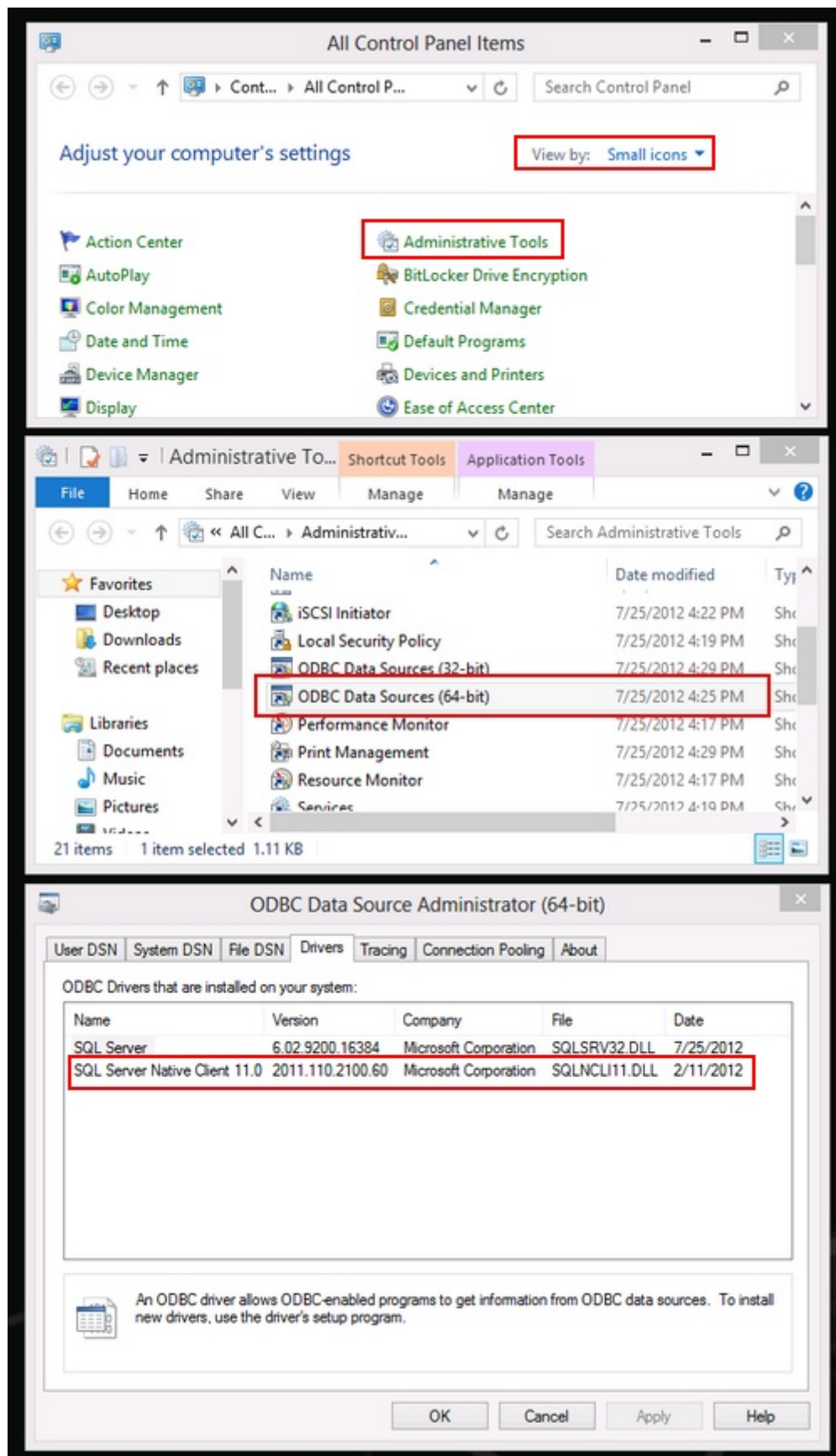


SQL Server Configuration Manager

#### Verify that SQL Native Client is installed

If the connection fails from a workstation that is not running SQL Server, verify that SQL Native Client was installed successfully. Open Administrative Tools in Windows Control Panel and click the Data Sources or Data Source (64) link. Select the Drivers tab to view the list of installed drivers. If SQL Native Client is missing, run the AmigoPOS installer again and select the SQL Native Client version that matches the version of SQL Server Express, or download and install separately from either link below:

- SQL Server 2008 Native Client (32-bit): <http://go.microsoft.com/fwlink/?LinkID=188400&clcid=0x409>
- SQL Server 2008 Native Client (64-bit): <http://go.microsoft.com/fwlink/?LinkID=188401&clcid=0x409>
- SQL Server 2012 Native Client (32-bit): <http://go.microsoft.com/fwlink/?LinkID=239647&clcid=0x409>
- SQL Server 2012 Native Client (64-bit): <http://go.microsoft.com/fwlink/?LinkID=239648&clcid=0x409>



### 3.3 Program Updates

Frequent updates with new features and fixes are made available for download at [amigopos.com](http://amigopos.com) and can be installed over an existing release without uninstalling first. A list of new features and fixes is available in Back Office>Help>Program Updates or by subscribing to the twitter feed.

To install an update:

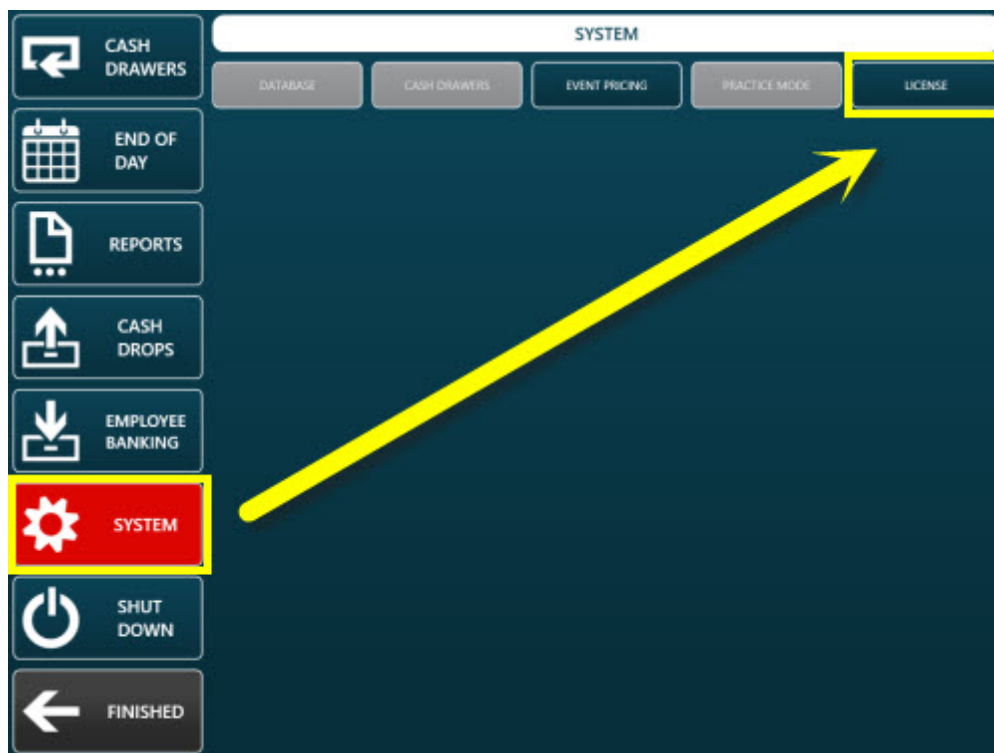
1. [Back up](#) the SQL Server database
2. Download the latest release at <http://www.amigopos.com/Download/Version8>. Logging in to the web site is not required and the license will remain valid when the update is installed.
3. Shut down the pos application, back office, the remote display and any AmigoPOS client applications at all pos stations, tablets and back office computers
4. Install the update on all pos stations, tablets and back office computers and reboot if prompted. All settings are retained and the application will continue to use the existing database server settings.

Note that the same version of the application must be installed on all networked computers and installing an older release on a system with a database that has already been updated by a new release will render the system inoperable until the latest release is installed.

### 3.4 Licensing

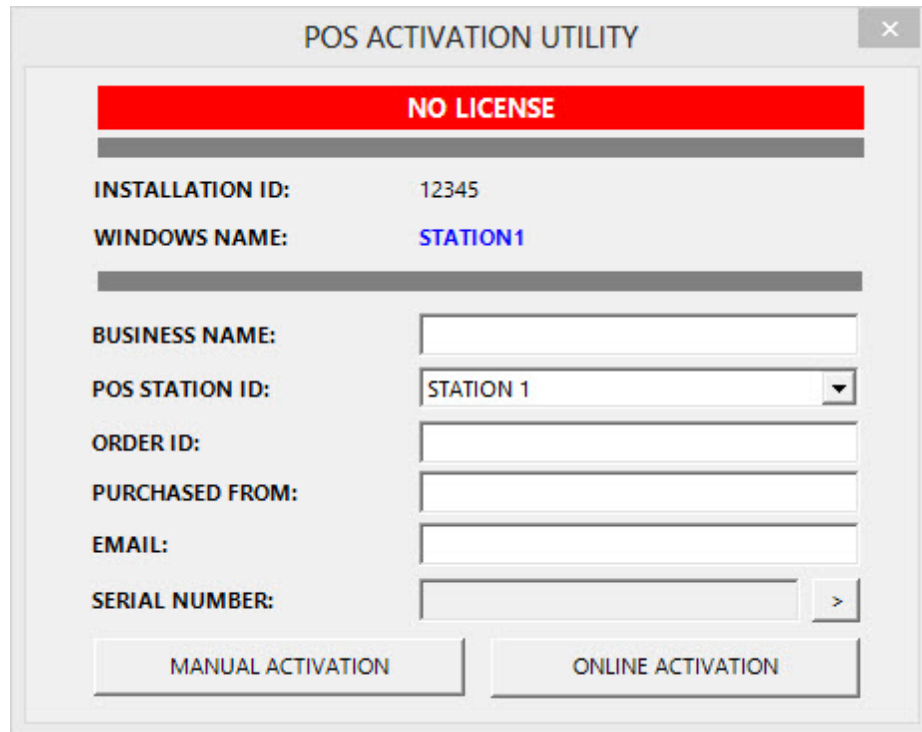
Please complete the following procedure is used to license AmigoPOS 8. Note that a license is required only at pos stations where orders are taken or customer receipts are printed. Back Office workstations do not require a license. Although not required, an internet connection at each pos station will simplify the activation process. Refer to the order confirmation email message for the order number used in Step 2.

1. After purchase, an confirmation email message was sent with instructions to download and install the AmigoPOS 8 activation utility. When installation is complete, reboot and start AmigoPOS. The activation utility will appear at program startup and can also be accessed by clicking on MANAGER > SYSTEM > LICENSE, as shown below. Note that the LICENSE button is not available until the activation utility is installed.



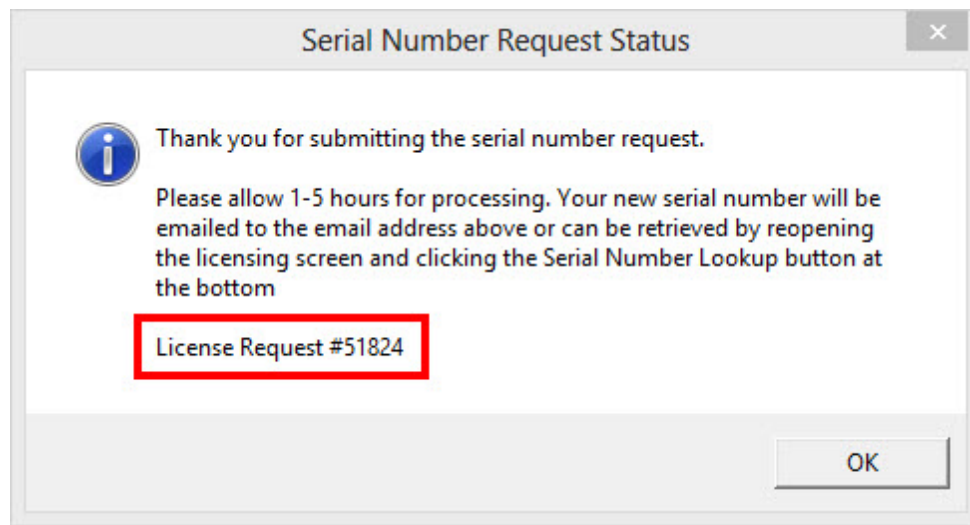
Manager Screen > System > License

2. All information entered is permanent and is used to generate a unique serial number to license the pos station. Enter the business name as it should appear on the first line of the customer receipt (below the logo). Select a unique pos station id. Note that 2 pos stations may not share the same station id (one will prompt the user to shut down). The computer name is the Windows workstation name. This name is not used by AmigoPOS but is used to generate the serial number and should not be changed after AmigoPOS is registered. The installation code is generated automatically and cannot be modified. In addition, enter your email address, the vendor and order id. All fields are required.

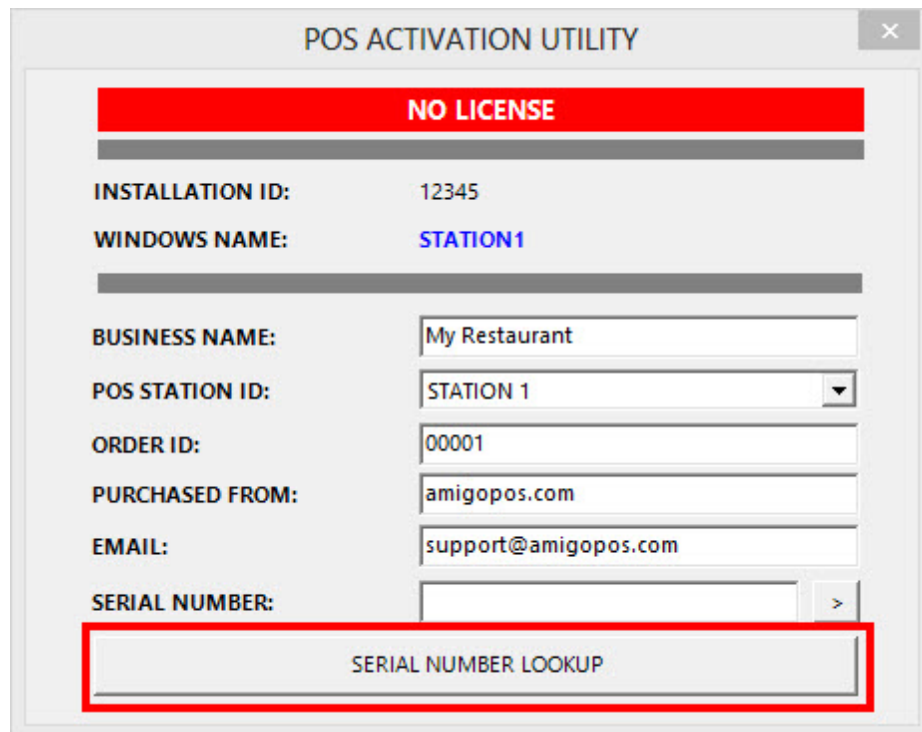


Activation Utility

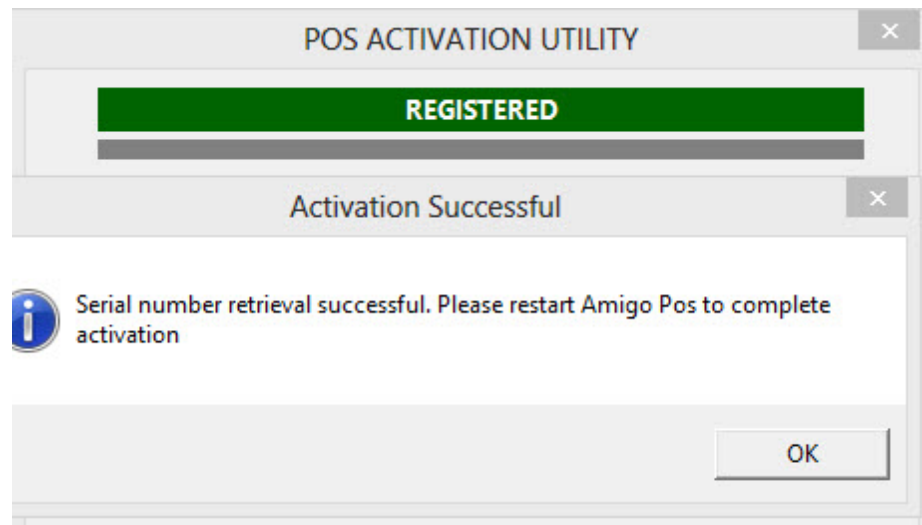
3. If the pos station has internet access, click the Online Activation button to submit the license request by connecting to the license server. A confirmation will appear with the license request id. If an error occurs, check the internet connection and try again or use manual activation.

**Request Confirmation**

5. Please allow 1-5 hours for the serial number to be generated. The serial number will be emailed but can also be retrieved automatically by pressing the **Serial Number Lookup** button.

**Serial Number Lookup**

6. If the serial number is available, it will be downloaded and AmigoPOS will be activated. Restart AmigoPOS to complete activation. The license status should now display **Registered**.



Successful Activation Confirmation

7. If an internet connection is not available or the online activation fails, use the manual activation method. Press the Manual Activation button in step 3 above to copy the information to the Windows clipboard. A text file is also saved to the desktop. Either paste the information into a support ticket or attach the text file to a support ticket (or email). Your serial number will be returned via email. Copy & paste the serial number into the Serial Number box and press the activate button, as shown below. Restart AmigoPOS to complete activation.

The screenshot shows the 'POS ACTIVATION UTILITY' window with a red bar at the top. Below the bar, there are several fields: 'INSTALLATION ID', 'WINDOWS NAME', 'BUSINESS NAME:', 'POS STATION ID:', 'ORDER ID:', 'PURCHASED FROM:', 'EMAIL:', and 'SERIAL NUMBER:'. A large yellow oval with the text 'Enter the serial number in the box and click the button' is overlaid on the 'SERIAL NUMBER:' field. A red rectangle highlights the 'SERIAL NUMBER:' field and the 'SERIAL NUMBER LOOKUP' button. A small yellow oval highlights the 'SERIAL NUMBER LOOKUP' button.

Manual Activation

## 3.5 System Requirements

The following are minimum system requirements to successfully install and run AmigoPOS:

### Operating System

- Microsoft® Windows 10 (32- and 64- Bit)
- Microsoft® Windows 8.1 (32- and 64- Bit)\*
- Microsoft® Windows 8 (32- and 64- Bit)\*
- Microsoft® Windows 7 (32- and 64- Bit)
- Microsoft® Windows PosReady 7 (32- and 64- Bit)

\*Windows RT is not supported

### Hardware (click [here](#) to view recommended hardware)

- 1024 MB Ram (1GB Recommended)
- Intel i3 or equivalent
- Monitor capable of 1024x768px screen resolution or greater. AmigoPOS can run at lower screen resolutions, but the system font size may require adjustment. The demonstration database images and font settings are optimized for 1024x768px.

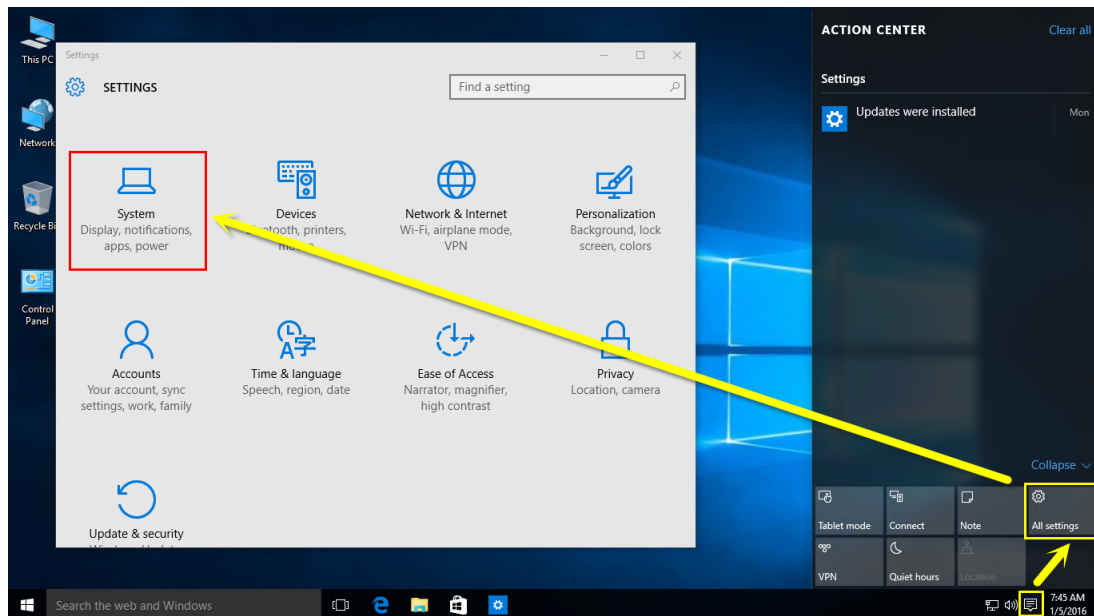
### Network

- Users with more than one pos station or remote printers must ensure that the pos stations (and print servers, if applicable) are connected to a stable, reliable and secure network. **Wired networks are preferred** for best performance and reliability.

## 3.6 Windows 10

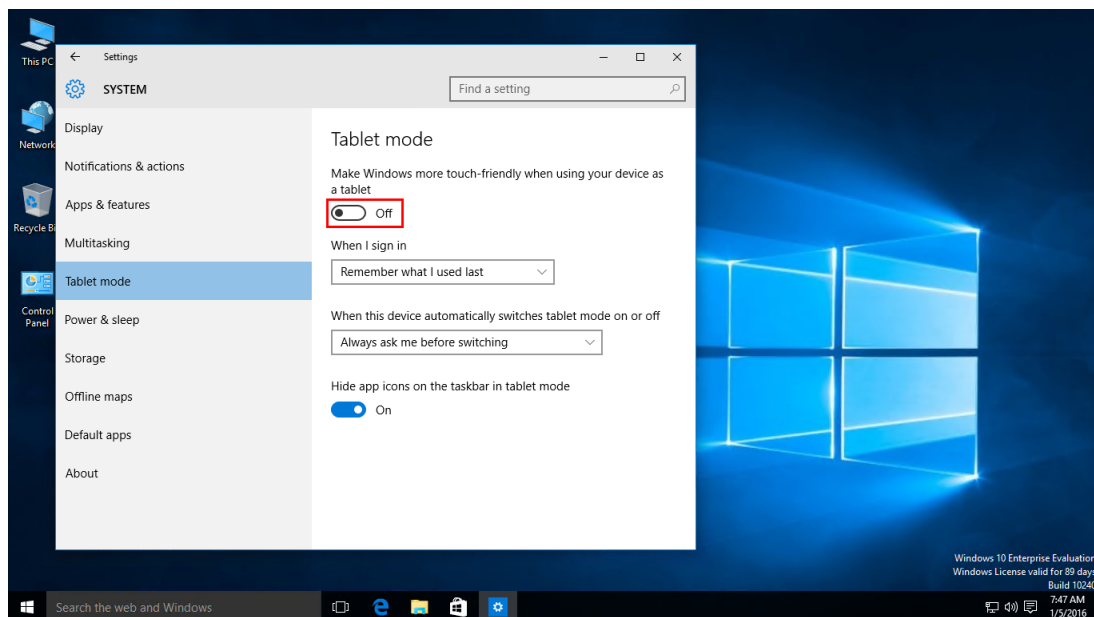
Windows 10 default power settings are not compatible with pos stations because both the hard disk and display are set to automatically turn off after a short interval, generally 15-20 minutes. Follow the steps below to disable these power saving features. In addition, disable 'Tablet Mode', which may result in inadvertent double-clicks when using some touch monitors.

Login to Windows 10 and click the notifications icon at the bottom right. Click **All settings** followed by **System**.



Windows 10 Desktop

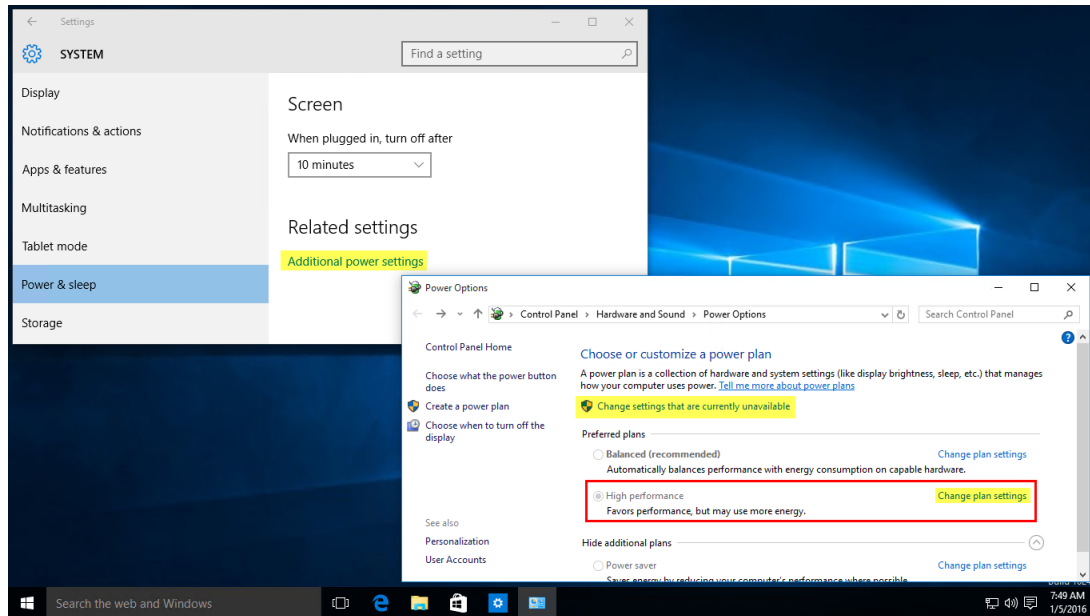
Select **Tablet mode** and verify that it is set to **Off**.



Windows 10 Tablet Mode

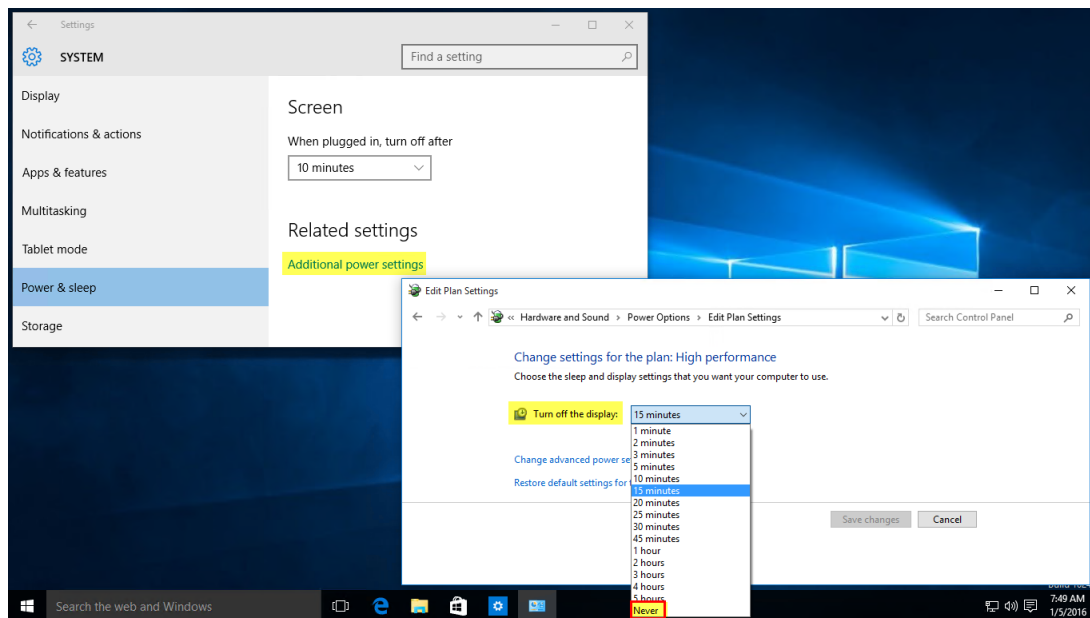


Select **Power & sleep** and click **Additional power settings**. Click **Change settings that are currently unavailable**, select **High performance** and click **Change plan settings**.



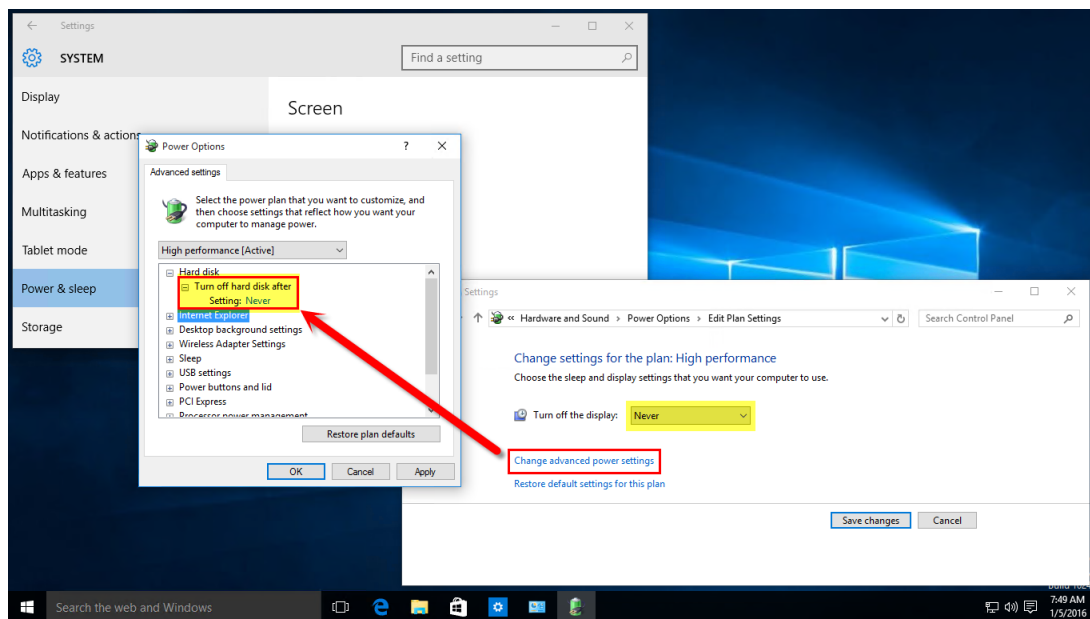
**Windows 10 Tablet Mode**

Click **Additional power settings** and select **Never** from the **Turn off the display** drop-down list.



**Windows 10 Power & Sleep**

Click **Change advanced power settings** and set **Turn off hard disk after** to **0**. Click **Apply** to verify that the 0 has been replaced by **Never**. Click **OK** followed by **Save changes**.



Windows 10 High Performance Power Settings

## 3.7 Windows Homegroup

### Introduction

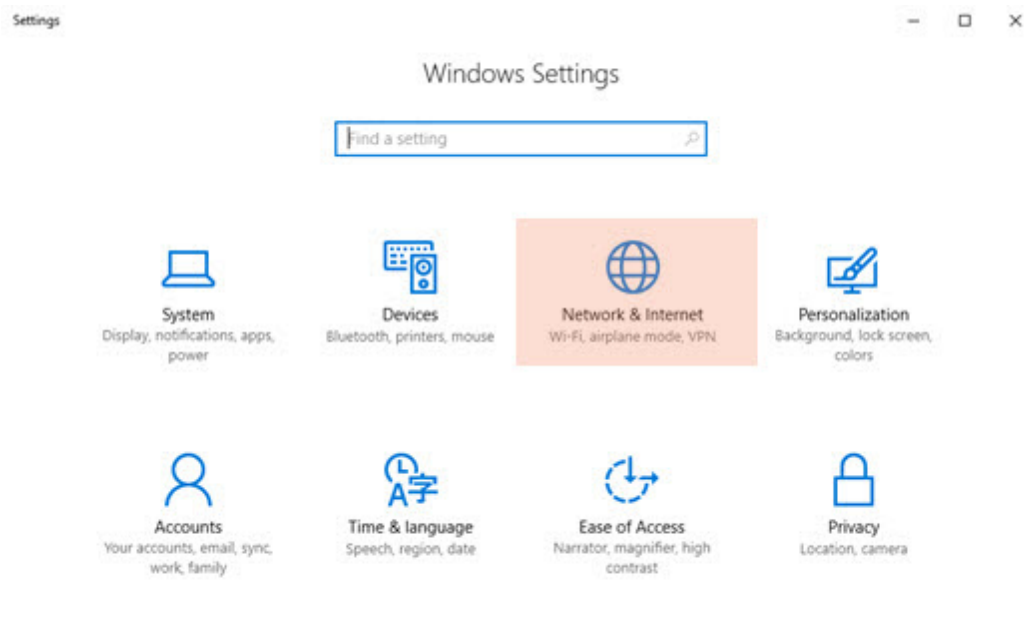
The Windows HomeGroup feature provides a simple method of sharing printers, folders and files with other Windows computers connected to your local network. Any computer running Windows 7 or later can join a HomeGroup.

### Prerequisites

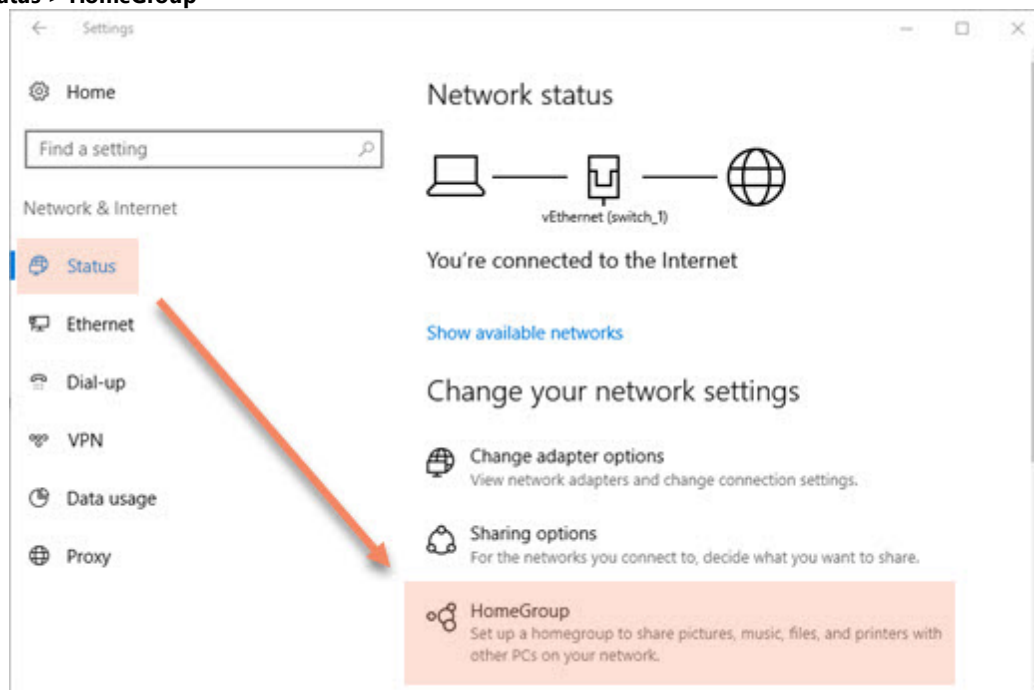
Connect all devices including pos stations, remote displays and back office computers to the network router using a Cat6 Ethernet cable. Connect tablets to the router using the WiFi connection.

### Create a HomeGroup

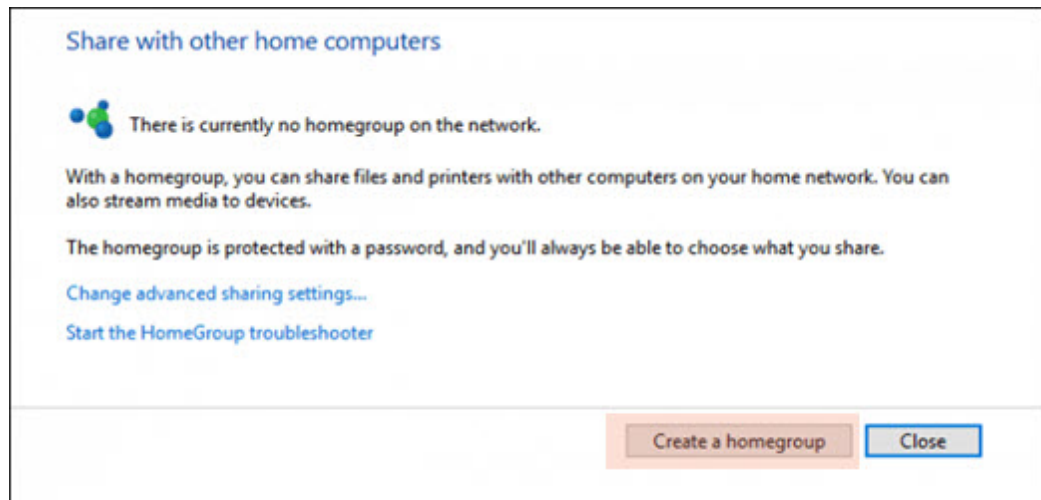
Click **Start > Settings > Network & Internet**



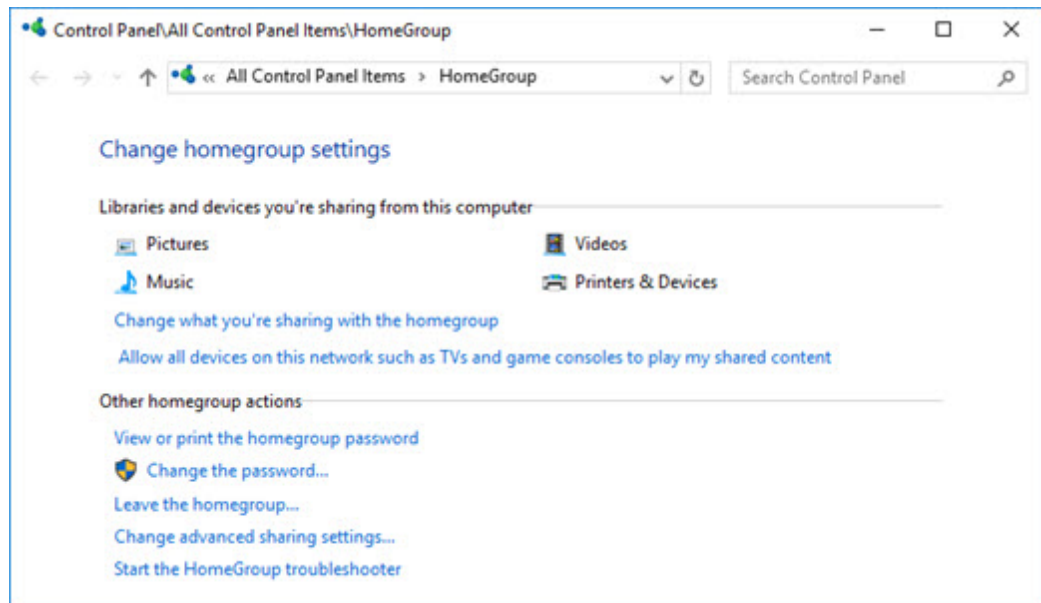
Click **Status > HomeGroup**



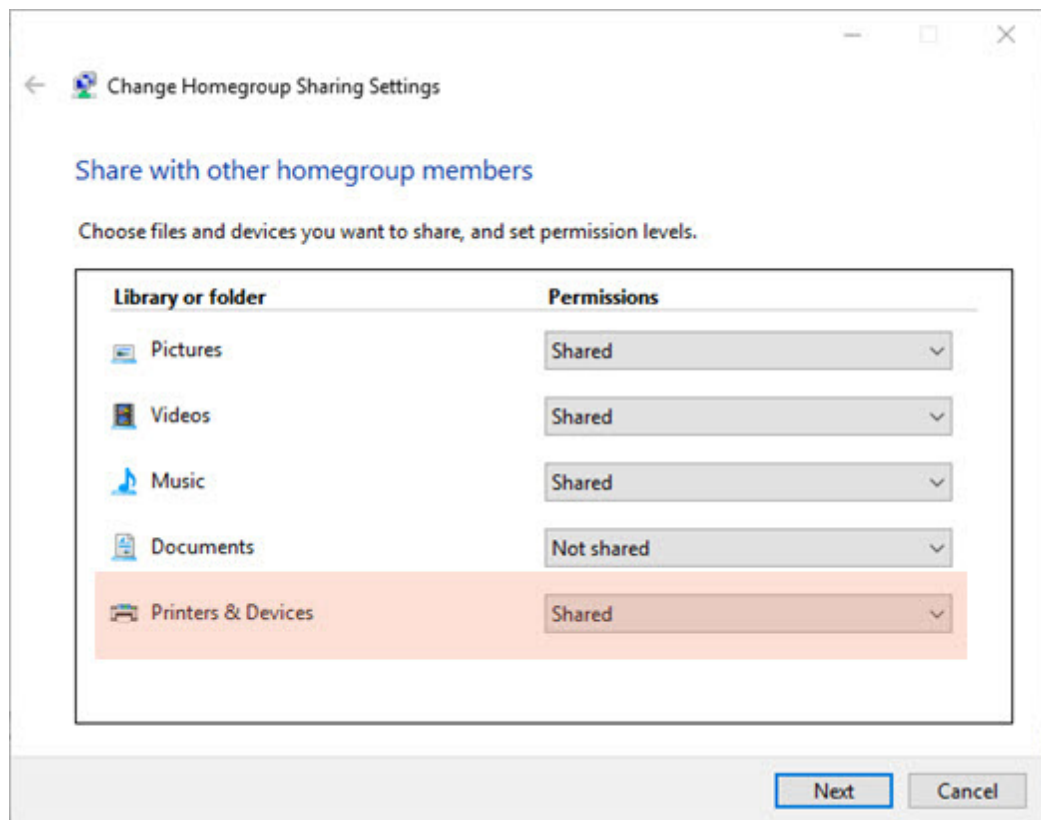
If a HomeGroup has not been created by any computer on the local network, the following screen will appear prompting the user to create a new HomeGroup.



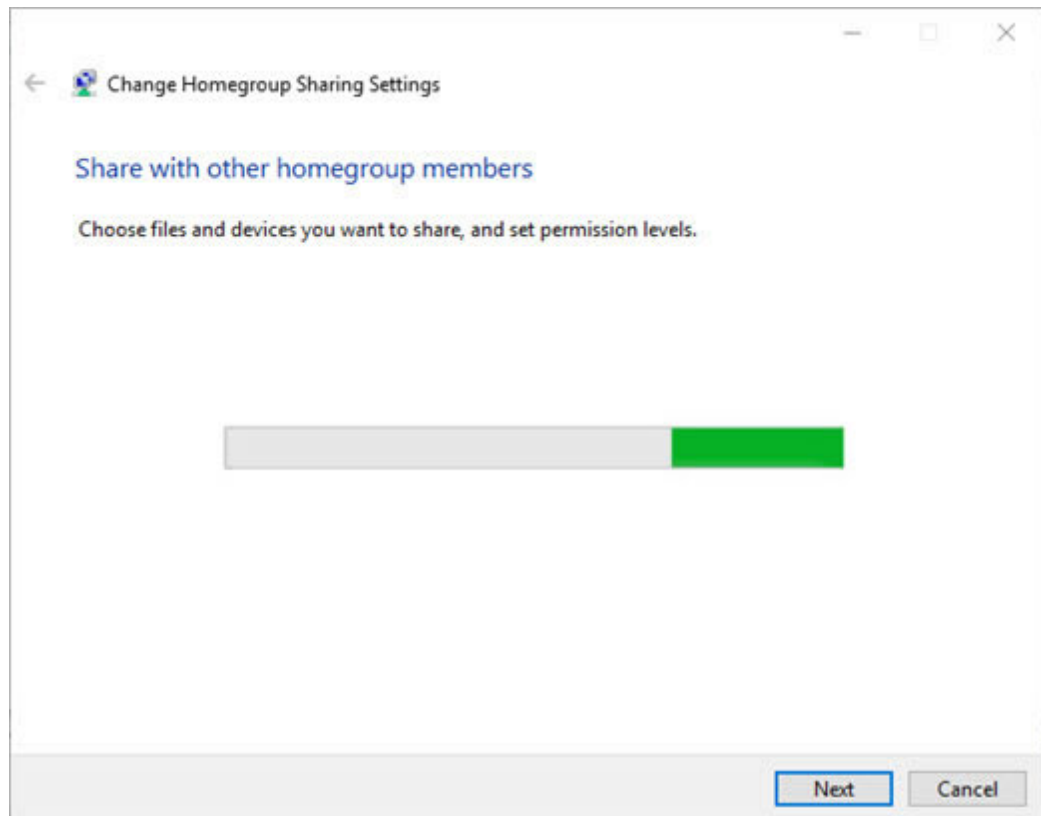
If a HomeGroup was previously created the following will appear.



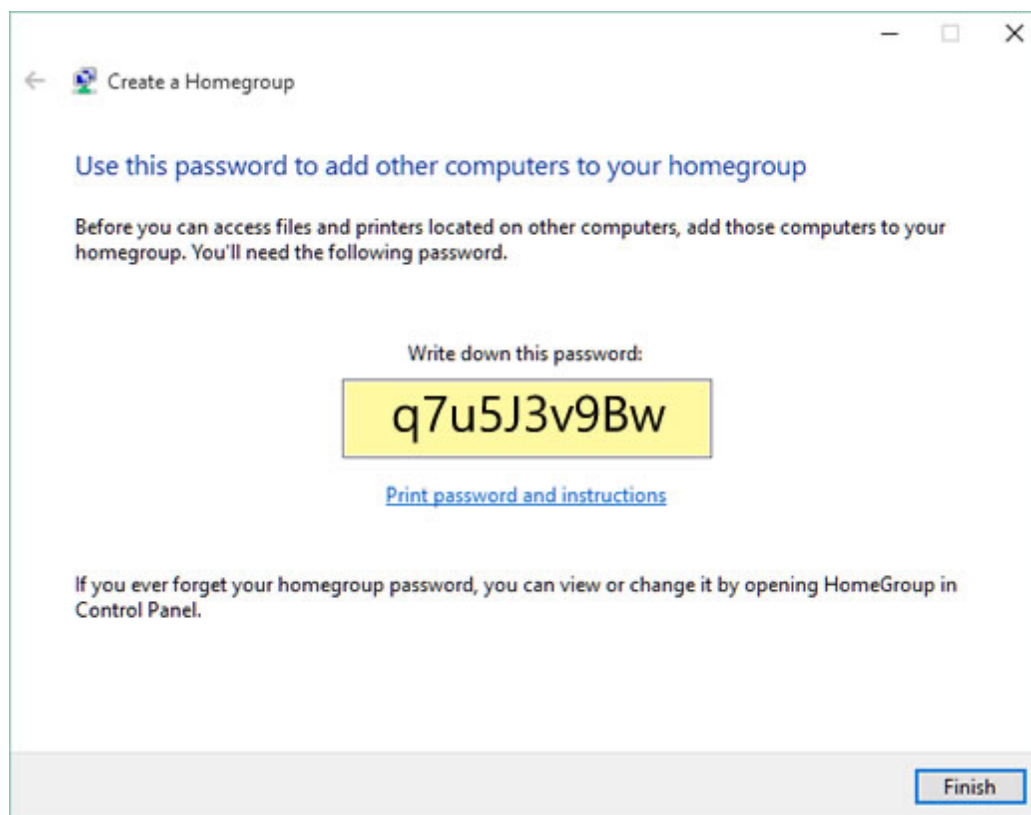
Click **Create a homegroup** and choose what to share with other HomeGroup computers. Note that AmigoPOS does not require any of the libraries to be shared with other computers.



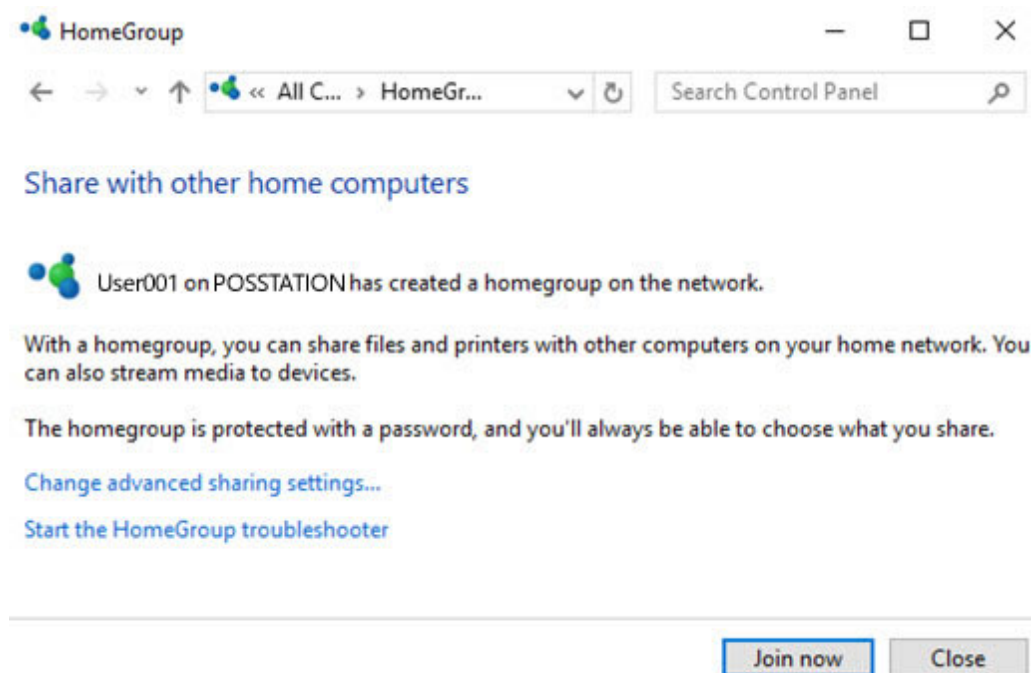
Wait a few moments while the libraries are shared.



The HomeGroup password is displayed on the confirmation screen. Make a note of the password so that other computers on the network can connect to the HomeGroup.



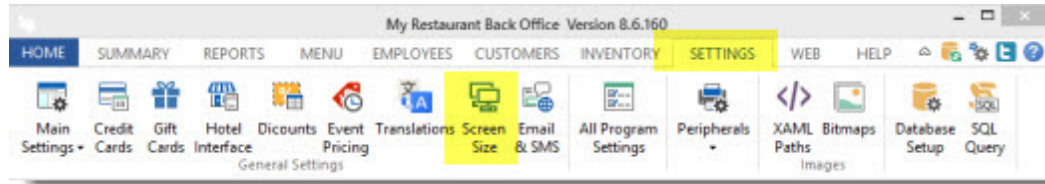
Repeat the process at all other computers on the network, including tablets. Since a HomeGroup was previously created by another computer on the network, the following will appear on the other computers, prompting the user to join an existing HomeGroup.



## 3.8 Screen Resolution

AmigoPOS is capable of resizing to any screen resolution. Select the screen resolution by clicking the Screen Size shortcut in the AmigoPOS program group on the start menu or desktop shortcuts folder. Note that running a very high screen resolution, i.e. over 1280x768 px, will consume more system resources. Most touch screen monitors will perform best at 1024x768 px. AmigoPOS must be restarted after the screen resolution is changed.

The demonstration database settings and images are optimized for 1024x768. When using a different resolution, you may adjust values such as text size for individual menu items



Back Office > Configuration



Screen Size Adjustment

## 3.9 International Users

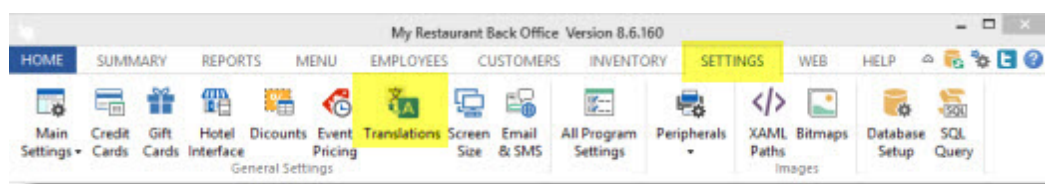
### 3.9.1 Overview

**Important:** Users of **Arabic, Chinese, Greek, Japanese, Korean, Russian, Serbian** and other languages that require non-standard fonts should use a **Star Micronics** or compatible thermal printer that is capable of interpreting **Star's Line Mode** command set to print customer receipts. In addition, **you must ensure that the printer contains a pre-installed code page that matches your requirements.**

The inexpensive **Star TSP100 futurePRINT** is an ideal printer for printing customer receipts and prep tickets since all character sets are included and is readily available in most areas.

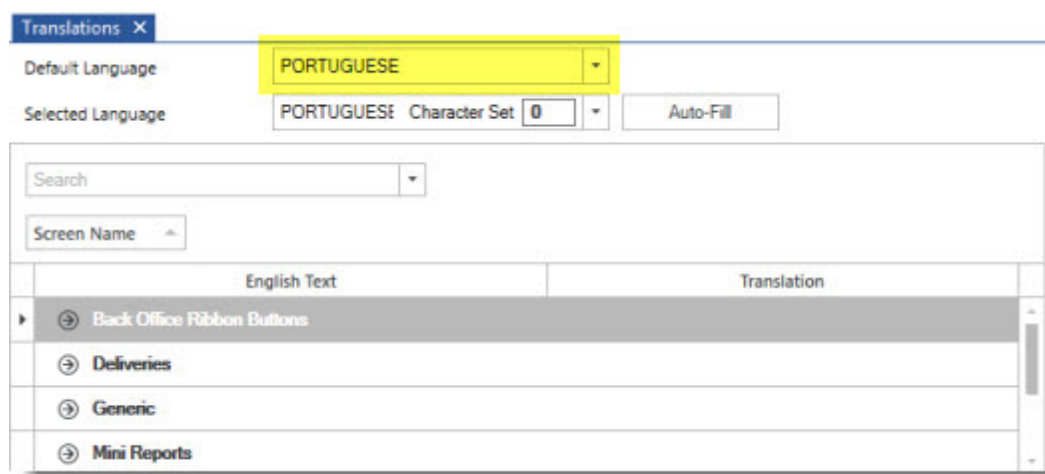
In order to provide maximum printing speed, AmigoPOS uses the **Star Line** (and/or ESC/POS for some languages) command set to send instructions directly to the printer, bypassing the Windows printer driver. This results in **speeds of up to 50 times faster** than applications that use Windows drivers.





Back Office > Configuration

Several compatible printers also ship with additional code pages that may be used for your language, but complex languages such as Chinese are available on limited models and must be special ordered on some printers (such as the Epson TM-T88). If you are unsure, contact the vendor or manufacturer to receive the printer's specifications listing the available code pages.

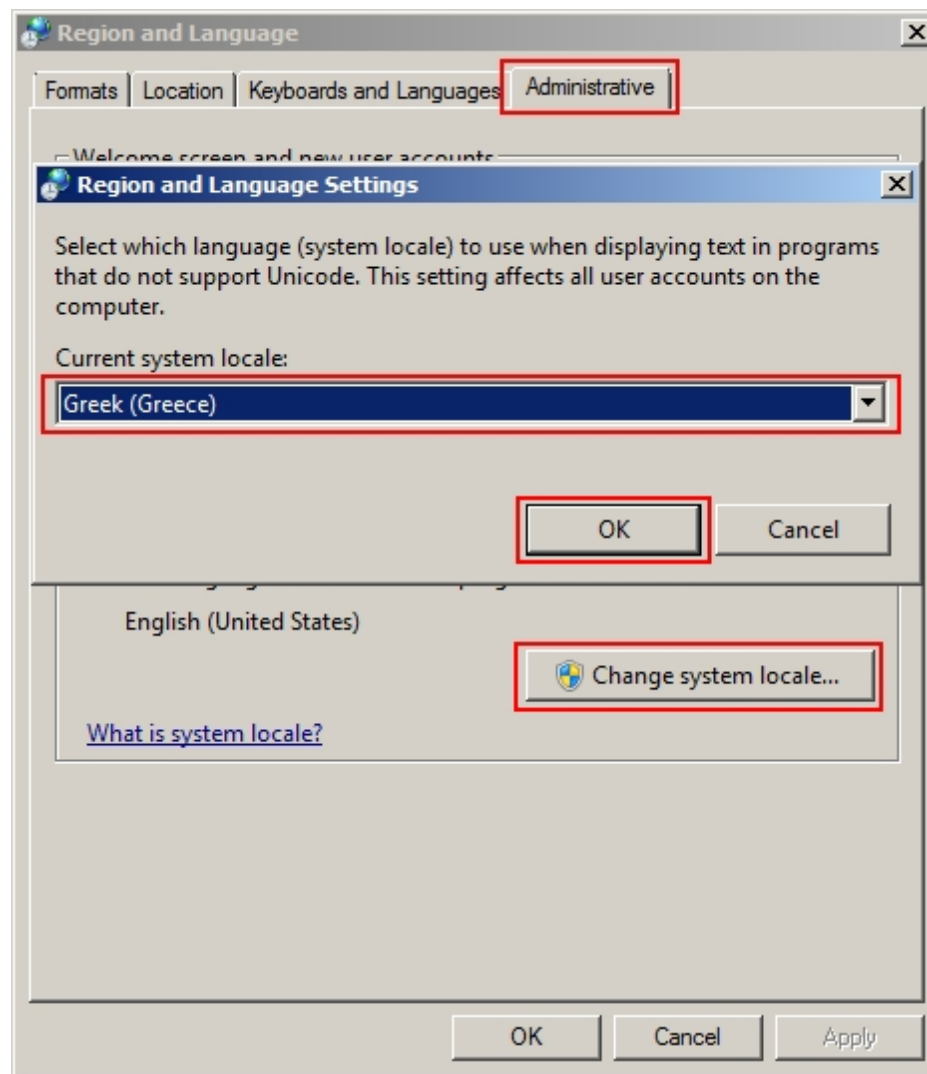


Specify the language in Back Office/Settings/

AmigoPOS includes the ability to display button text in your native language. To use a foreign language, open the Translations screen in Back Office/Settings/, select your language from the list and restart AmigoPOS.

If your language is listed with an asterisk, you must also ensure that the pos station is configured to use the language properly. This step is required for the following languages: Arabic, Chinese Greek, Japanese, Korean, Russian, Serbian and other languages that require non-standard fonts. Note that Arabic text is not aligned right-to-left on most buttons or back office grids. Open the **Regional and Language Options** applet in the MS Windows Control Panel and click on the **Advanced** tab. Adjust the settings as required and **REBOOT** the pos station.

For example, Greek language users will use the following settings in Windows 7:



**Specify the non-Unicode language in Windows 7**

Most English phrases are computer translated and contain errors. You may edit each phrase to suit your needs. In addition, you may define a custom language for languages that are not listed.

Καφενείο Κιβωτός  
 Κέντρο  
 Κιβωτός, Γρεβενά  
 462.00.000

Τραπέζι: 29	Αιθριο
Σερβ: Γιορίνας	4 Πελάτες

---

Χάμπουργιερ	5,25
Τηγανιτές πατάτες	2,25
Καφές Φραπέ	2,50

Φ.Π.Α: €1,50

---

Συνολικό ποσό: €10,00

---



Πάντα ανοικτοί  
 Σας ευχαριστούμε. Ελάτε πάλι

ΝΟΜΙΜΗ ΑΠΟΔΕΙΞΗ

29/1/2008 10:27:14 πμ

**Customer receipt using Code Page 18 from a Dell TSP100  
 (Star-compatible) thermal printer**

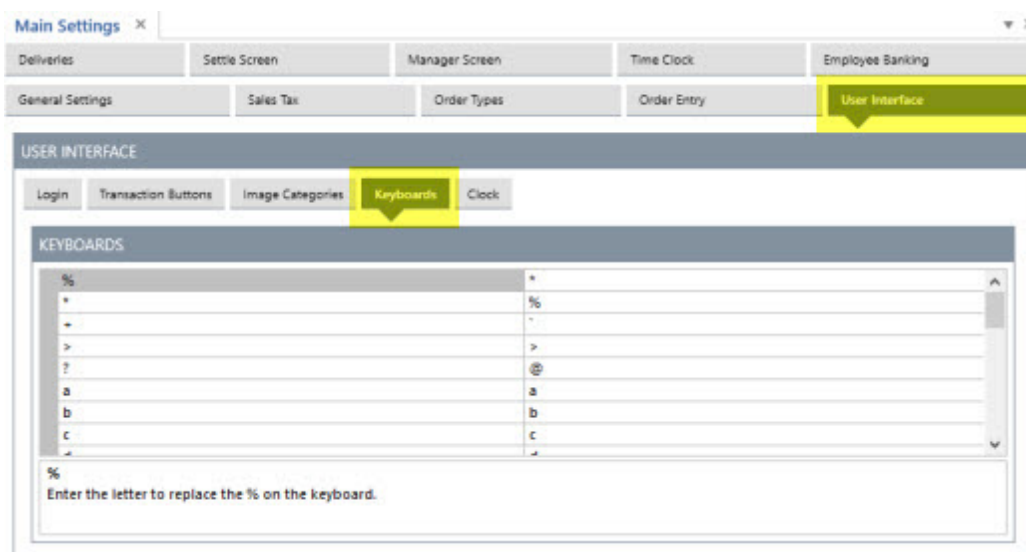
After the language settings are configured correctly and the computer has been rebooted, the default printer text settings should be modified to match your local preferences. In the example shown above, the text for **Server**, **Table**, **Guests**, **Total Amount**, **Top Line Text** and **Bottom Line Text** have been edited in Back Office/Settings/Peripherals/by selecting **Receipt Printer** from the drop-down list. Edit the tax name to correspond to your tax rates (enter any mandatory tax messages by entering text for the top or bottom line values described above). In addition, the **Order**

**Type** description has been modified in Back Office/Settings/Main Settings. After editing the default text, the database must be synchronized before printing the order.

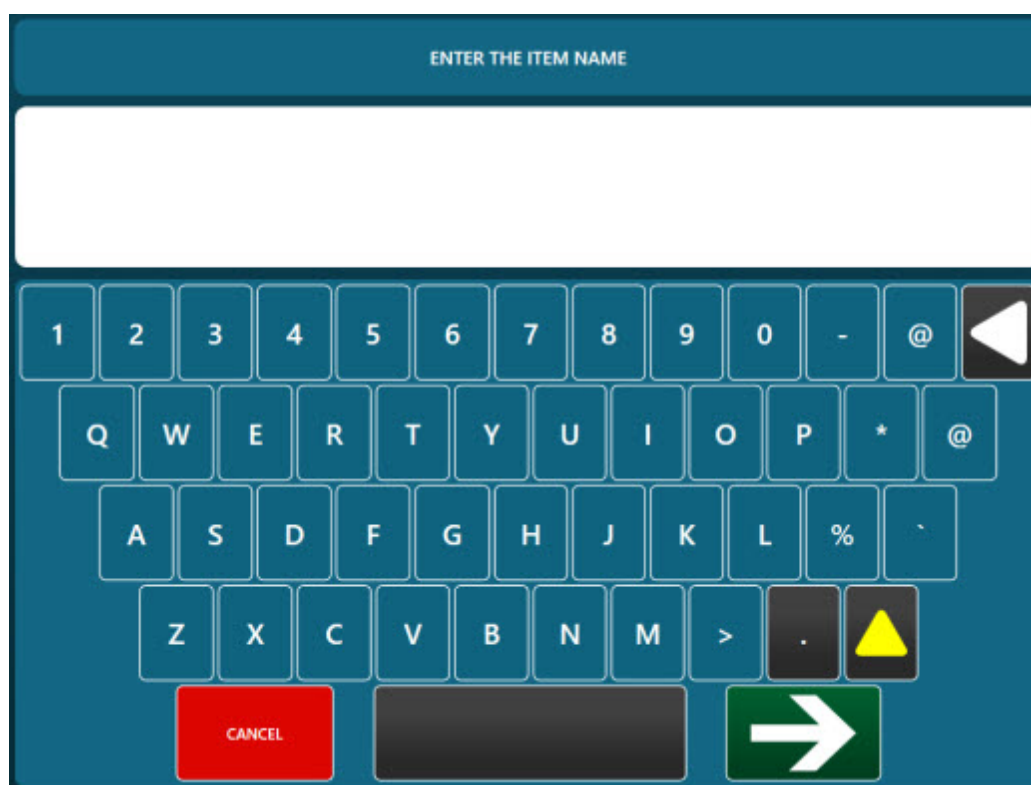
Star Micronics Character Code Tables Reference		
Code	Page	Description
0		Normal
1		#437 USA, Std Europe
2		Katakana
3		#437 USA, Std Europe
4		#858 Multilingual
5		#852 Latin-2
6		#860 Portuguese
7		#861 Icelandic
8		#863 Canadian French
9		#865 Nordic
10		#866 Cyrillic Russian
11		#855 Cyrillic Bulgarian
12		#857 Turkey
13		#852 Israel
14		#864 Arabic
15		#737 Greek
16		#851 Greek
17		#869 Greek
18		#929 Greek
19		#772 Lithuanian
20		#774 Lithuanian
21		#874 Thai

### 3.9.2 On-Screen Keyboards

International users may customize the various on-screen keyboards (misc screen, customer information screen, retail screen) in **Back Office>Settings>Main Settings User Interface>On-Screen Keyboards**. The single quote ' and pound symbol # are reserved characters and cannot be used on the on-screen keyboard. Enter the **lower-case** letter on the setup screen; the on-screen keyboard CAPS button can be pressed to convert to upper-case.



On-Screen Keyboard Setup



On-Screen Keyboard (Misc Item Screen)

### 3.9.3 Foreign Currency

Foreign currency exchange rates defined in **Back Office/Settings/Main SettingsSettle > Foreign Currency** can be used to automatically calculate and print the equivalent foreign currency below the grand total on the customer receipt, as shown on the customer receipt below.



### Customer Receipt

Specify which currencies to print on the customer receipt by checking the box under the **Show On Receipt** column for any currency that is enabled. A new currency definition can be entered on the type line, if required. Note that the Description, Symbol and Abbreviation shown above correspond to column names in the image below.

**Main Settings** ×

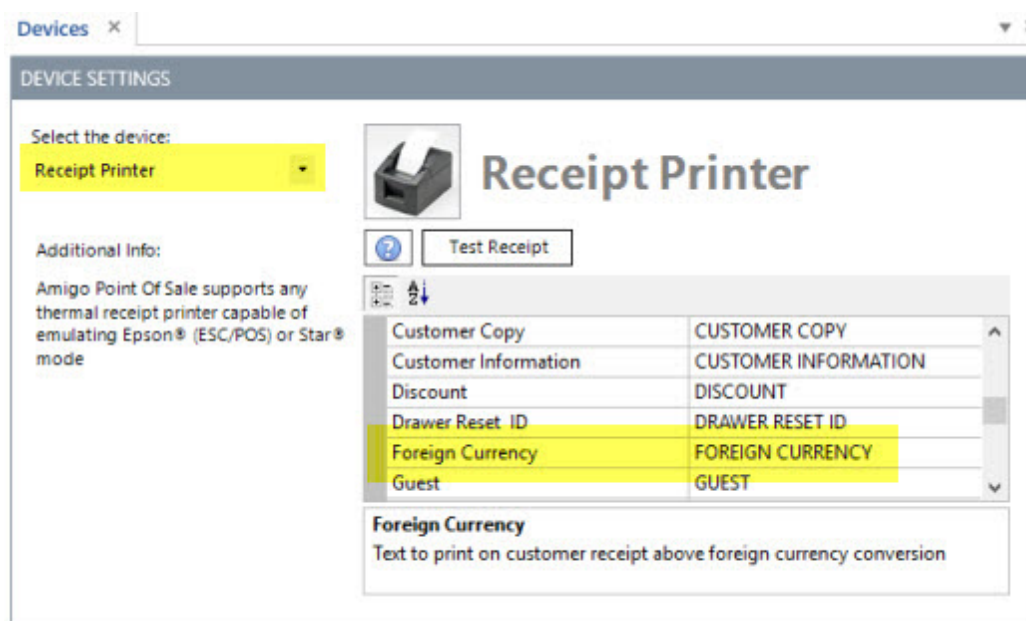
General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	<b>Settle Screen</b>	Manager Screen	Time Clock	Employee Banking
Payment Types	Currency Shortcuts	<b>Foreign Currency</b>	Cash Payouts	Local Payment Types

FOREIGN CURRENCY								
	COUNTRY	NAME	SYMBOL	ABBREVIATION	EXCHANGE RATE	ENABLED	PRINT ON	
+	Click here to add a new row							
	AUSTRALIA	Dollar	\$	AUD	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
	CANADA	Dollar	\$	CND	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
	CHINA	Yuan	?	YUN	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	EURO ZONE	Eur	€	EUR	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	FRANCE	Franc	F	FRF	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	ISRAEL	Sheqel	₪	SHK	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗

### Back Office Foreign Currency Settings

Specify the text to print above the currency conversion in **Back Office/Settings/Peripherals/** by changing the value of **Ticket Text Foreign Currency**.



Customer Receipt Settings

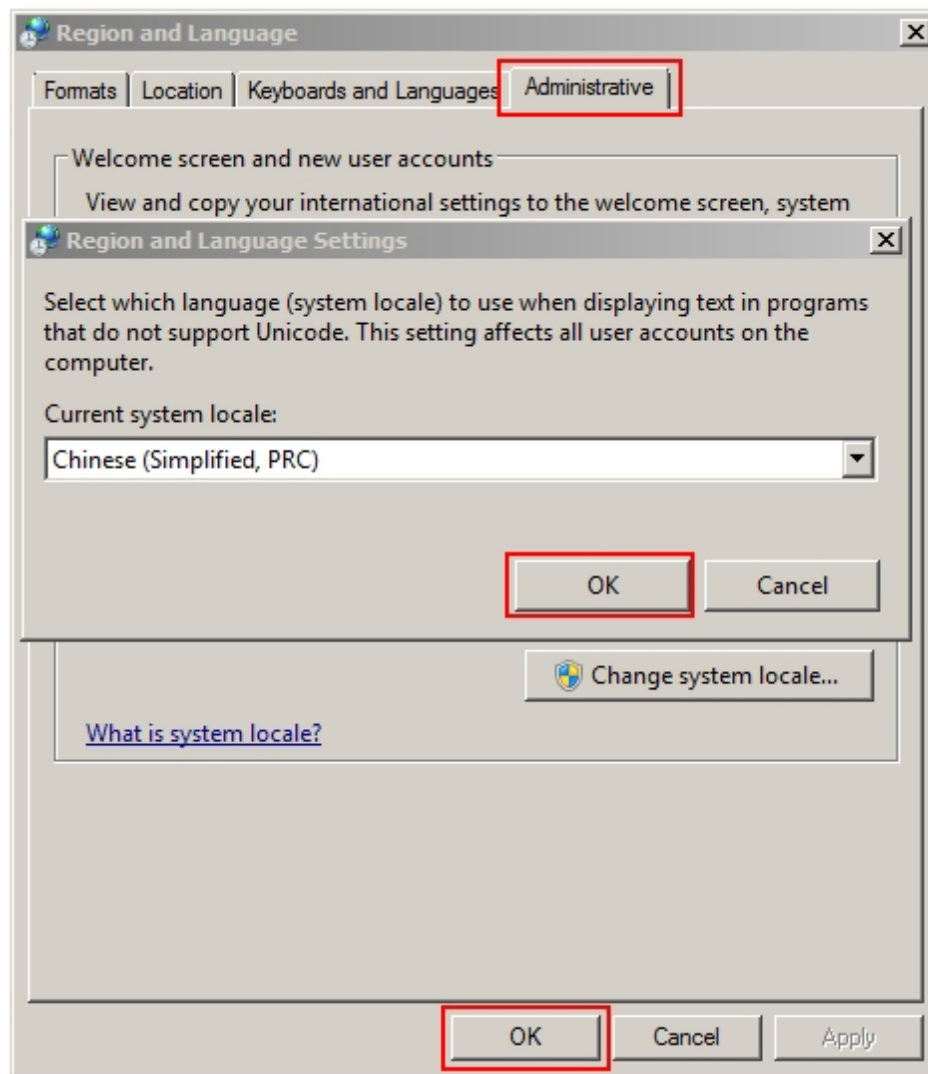
### 3.9.4 Example: Chinese Language

The following example details the steps required in order to use Chinese characters for the screen interface, prep tickets and customer receipts on a pos station equipped with a Star TSP100 thermal printer. The Star TSP100 includes internal Chinese character set.

Note that many printers do not contain internal Chinese characters by default and must be special ordered. AmigoPOS uses internal printer fonts to achieve maximum printing speed and quality, in contrast to many other pos applications that use Windows drivers to print Chinese characters, resulting in greatly reduced (20-50 times) print speed and "fuzzy" characters due to the fact that Windows printer drivers must first convert the printout to a graphic before printing.

#### I. Configure Windows to use Chinese characters

MS Windows must be configured to use Chinese characters. Open the Windows Control Panel and click on the Regional and Language Options applet. Select the 'Advanced' tab and choose Chinese from the drop-down list. Click OK and reboot the PC.

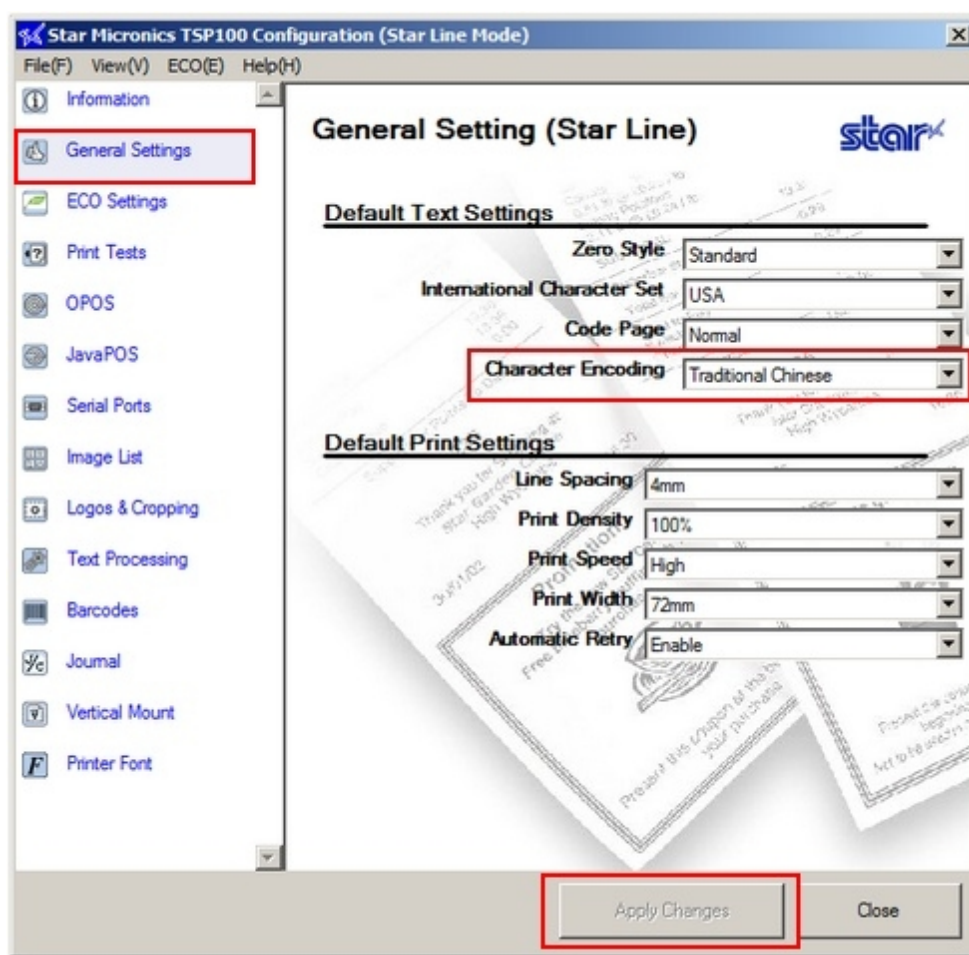


**Specify the language in the Regional and Language Settings Control Panel Applet**

## **II. Configure the printer to use Chinese characters**

After installing the Start TSP100, open the MS Windows Devices and Printers folder, right click on the receipt printer and click 'Properties'. Select the TSP Config tab and click the Launch Configuration Application button. Select the General Settings tab and choose Chinese from the Character Encoding drop-down list. Click the Apply Changes button followed by the Close button.

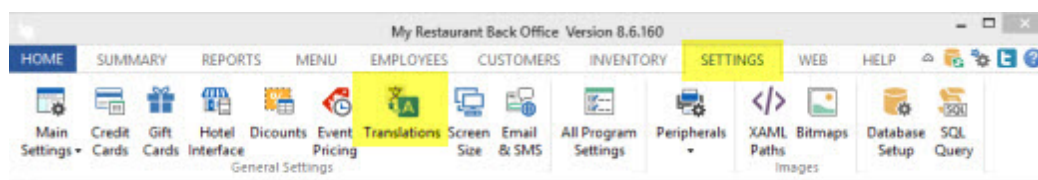




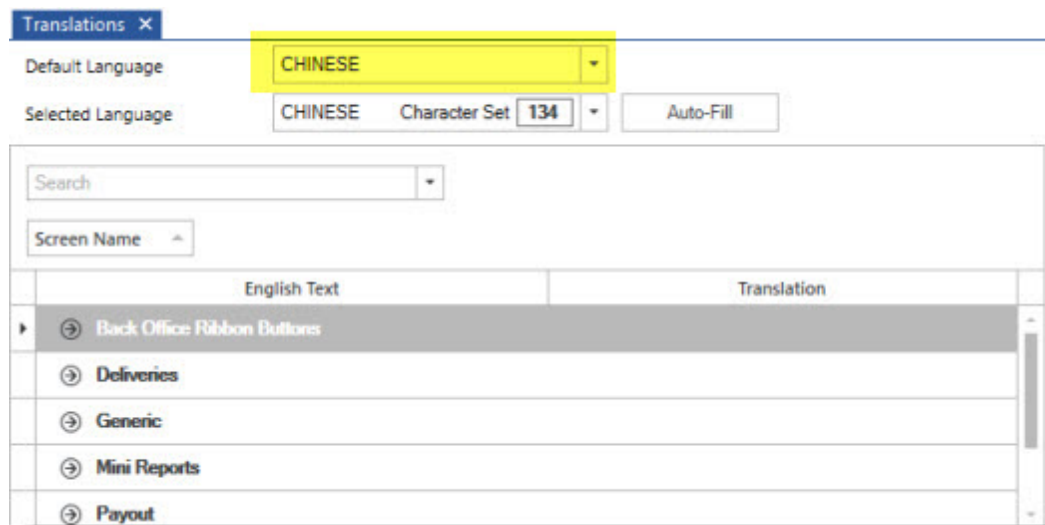
Star TSP100 Driver Configuration

### III. Configure AmigoPOS to use Chinese characters

In AmigoPOS Back Office, select Settings>Translations. Choose Chinese from the drop-down list. Note that any Chinese phrase can be translated by the user; the equivalent English phrase is shown in the left column. Restart AmigoPOS.



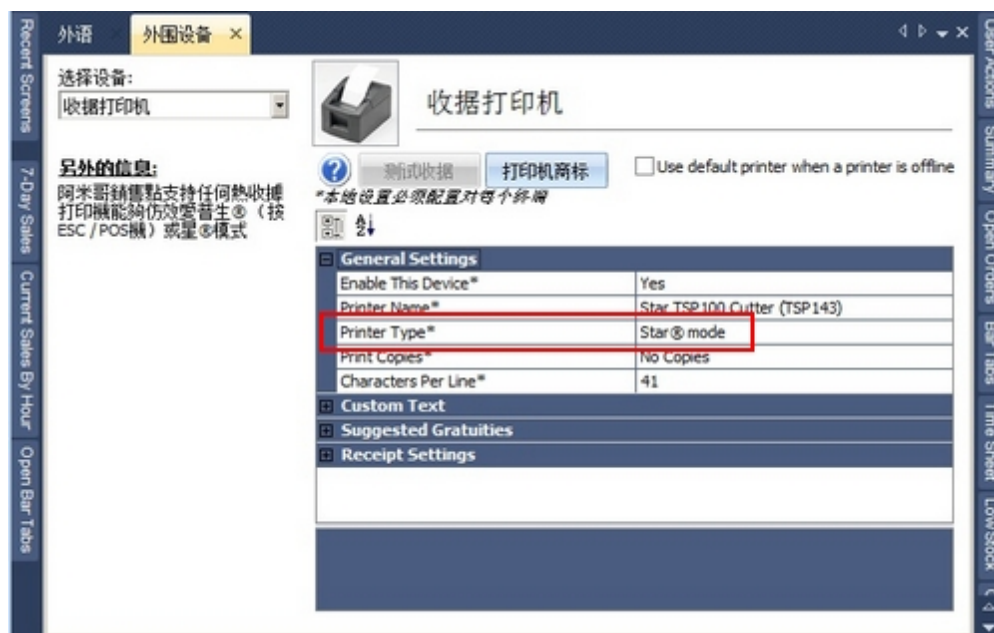
Back Office &gt; Configuration



Specify the language in Back Office - Configuration - Languages

#### IV. Configure AmigoPOS receipt printer settings

In AmigoPOS Back Office, select Settings>Peripherals. Select Star Line mode from the drop-down list next to the Printer Type.



Select the Printer Type in Back Office - Configuration - Peripherals - Receipt Printer

#### V. Customize the AmigoPOS user interface

All program captions and text can be customized to suit your needs by modifying the text in AmigoPOS Back Office, select Settings>Translations. Note that the default translations are translated by computer and may contain errors.



Restart Amigo Pos

### 3.9.5 Multi-Line Text

Multiline text is possible on the order entry screen guest check, order entry screen button text and customer receipt by inserting a single @ symbol between the item name text to appear on the top line and the text to appear on the second line. For example, the menu item in the image below is named Hamburger@汉堡包. When displayed on the screen or printed on the customer receipt, the @ symbol is replaced with a carriage return (line feed). This feature is useful for businesses where two languages are used.

Note that:

- Only one @ symbol should appear in the item name
- The @ symbol is replaced with a carriage return

**Menu Items** x

APPETIZERS

Add a new menu item

Item name contains

Hamburger@漢堡包 (1)

ONION RINGS (2)

Modifiers Main Settings Inventory Button Nutrition Special Pricing

**General Settings**

Item Name	Hamburger@漢堡包
Menu Category	APPETIZERS
Add to Retail Favorites	<input type="checkbox"/>
Prep Text	FRIES
Visibility	Visible
Button Position	1
Availability	In-Store & Web
Modifier Groups Visible Rows	3

**Item Name**  
Enter the menu item name. Limit the length to 20 characters.

Menu Item Editor

CUSTOMER COPY	COUNTER	CUSTOMER COPY	COUNTER
SERVER: DEMO U		SERVER: DEMO U	
Hamburger	6.90	French Fries	2.25
رجونبکاب		Τηγανιτές πατάτες	
French Fries	8.40	Hamburger (2 @1.75)	3.50
فريز كفتة ساطا طرية		Χάμπουργκιερ	
SUBTOTAL:	\$15.30	SUBTOTAL:	\$5.75
PAY THIS AMOUNT:	\$16.68	PAY THIS AMOUNT:	\$6.27

Customer Receipt

**NEW COUNTER ORDER**  
SERVER DEMO U

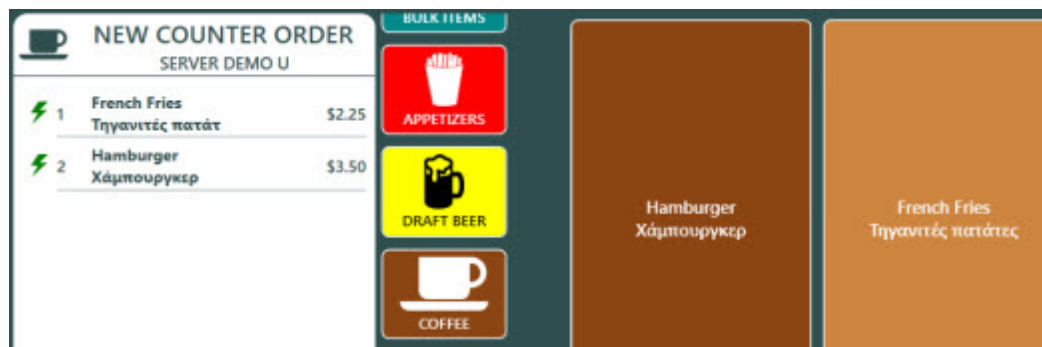
1 Bubble Tea \$5.00  
珍珠奶

PIZZA

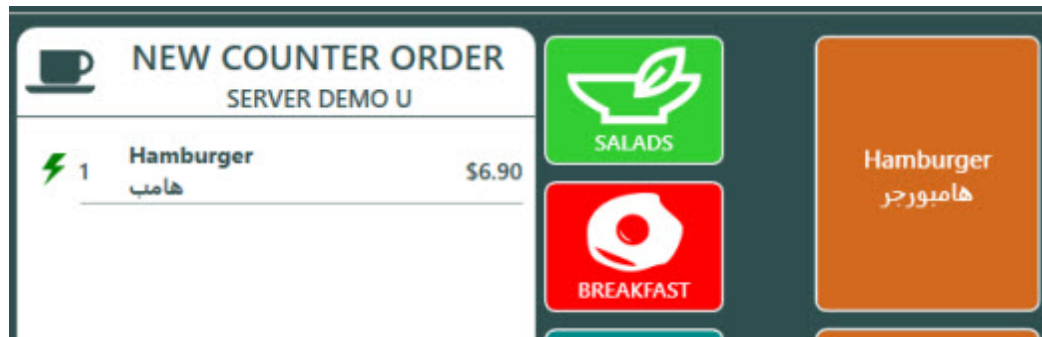
TACOS

Bubble Tea  
珍珠奶茶

Chinese



Greek



Arabic

Note that this does not

Part 4

# Start Screen

## 4 Start Screen

The start screen is displayed immediately after login unless the logged in user is restricted to Time Clock Only (or the logged in user's job type is set to automatically start a new order on the order entry screen after login). The current release is themed with green buttons on the left for new orders and light-red buttons on the right for other transactions. Later updates will offer the option of setting custom program-wide themes. The start screen is the first of multiple updates to be released in the coming weeks that will reduce system processor and graphic card requirements for workstations running Windows 7/8/10. The upcoming AmigoPOS tablet server is also based on this design.

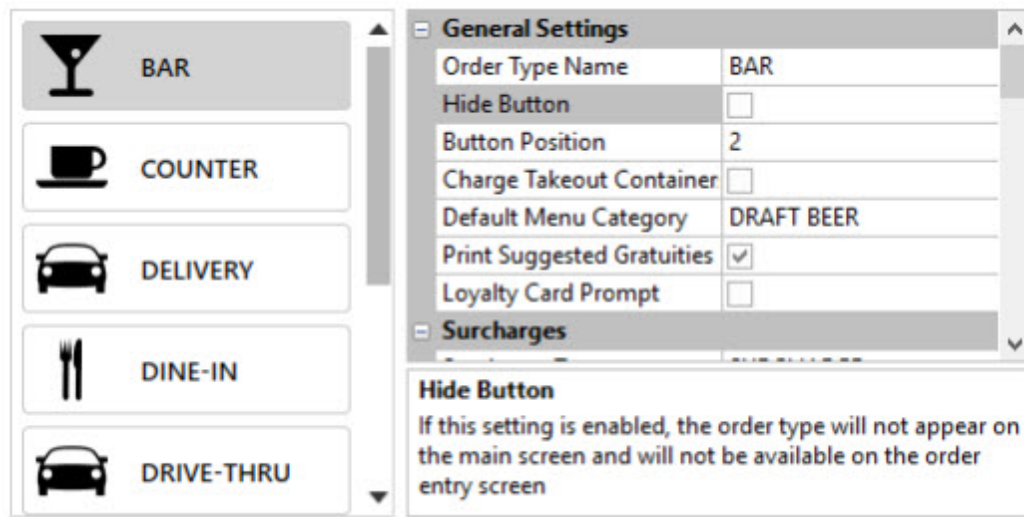


Start Screen

### New Order

The new order list displays a list of enabled order types. The button height is scaled automatically based on the number of enabled order types so that there are no empty spaces on the screen and scrollbars (or arrow buttons) are not required. Order types can be disabled in **Back Office>Settings>Main Settings>Order Types** by checking the box next to **Hide Button**.





## NEW ORDER

**Transactions**

The transactions list displays a list of enabled transaction types. The button height is scaled automatically based on the number of enabled transaction types so that there are no empty spaces on the screen and scrollbars (or arrow buttons) are not required. Transaction types can be disabled in **Back Office>Settings>Main Setting >User Interface>Transaction Buttons** by checking the box under the Hide column.

Main Settings x

General Settings Login Transaction Buttons Image Categories Keyboards Clock

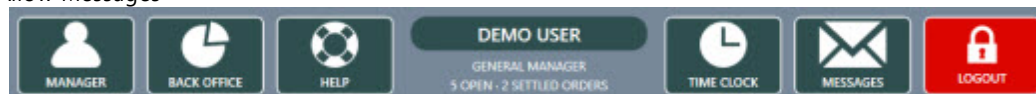
	DESCRIPTION	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON
	DELIVERIES	DELIVERIES	1	<input type="checkbox"/>
	House Accounts	CUSTOMER ACCOUNT	2	<input type="checkbox"/>
	Gift Cards	GIFT CARD	3	<input type="checkbox"/>
	No Sale	NO SALE	4	<input type="checkbox"/>
	Payout	PAYOUT	5	<input type="checkbox"/>
	CREDIT CARDS	CREDIT CARDS	6	<input type="checkbox"/>

## NEW ORDER

**User Functions**

The bottom of the screen displays a horizontal list of functions that are not directly related to order entry or transactions. The MANAGER, BACK OFFICE, TIME CLOCK and MESSAGES buttons can be disabled using job type permissions. Refer to the permissions help topic to set the following permissions for each job type:

- Allow Manager Screen
- Allow Back Office
- Allow Time Clock
- Allow Messages

**Current Orders List**

The current orders list displays a list of orders that have not been archived or voided. The list can be filtered by current user/all users, all order types/specific order type and current orders/scheduled orders. Buttons in the default position appear with white text. Yellow text is used to indicate that the button has been toggled.



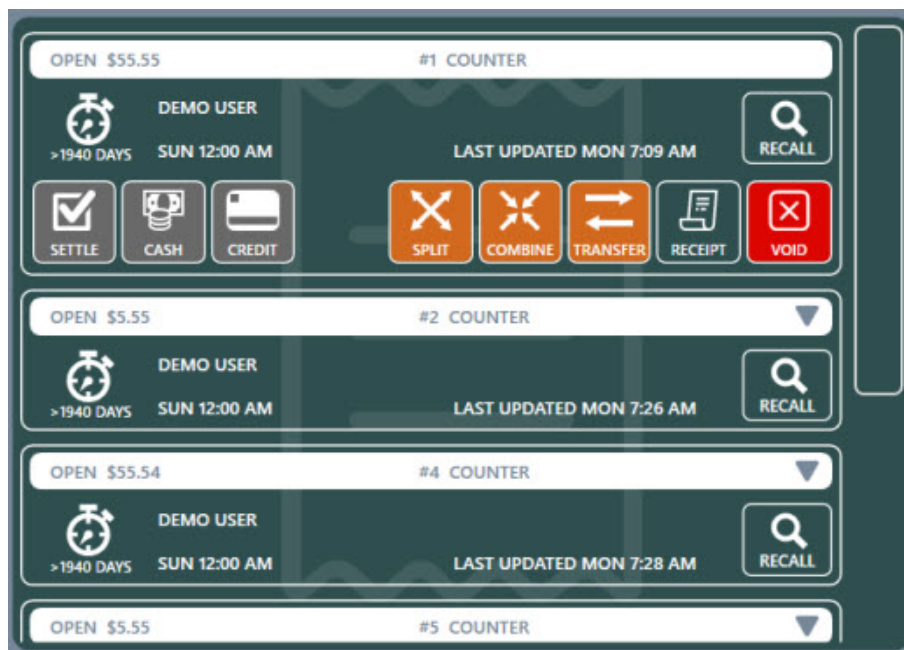


Orders List Options

- The **MY** button filters the list to display only the currently logged in user's orders. Toggle the MY button to include all users' orders. The MY button can be disabled by setting the **Allow Cross Edit** permission for the user's job type.
- The **OPEN** button filters the list to display only orders that have not been settled. In addition, orders that have been pre-authorized, but not captured, can be hidden from the list by setting the **Recall Screen Hide Open Pre Auths** setting to **Yes** in **Back Office>Settings>Main Settings>General Settings>Security**.
- The **ALL TYPES** button can be toggled to filter the list by a specific order type. The option to filter the list to display only bar tabs or only web orders is also available if bar tabs and/or web orders are in use.
- The **NOW** button can be toggled to display current orders only, scheduled orders only or to display both current and scheduled orders.
- The **LOOKUP** button can be used to display a specific order. Manual lookup is useful when the order would otherwise be hidden from the orders list, for example the lookup button can be used to display an order that has been pre-authorized but hidden from the list because the **Recall Screen Hide Open Pre Auths** setting is enabled.
- The **REFRESH** button can be used to reload the list with the currently selected filters.

### Order Editor

Select an order to display the available options. In the image below, a Dine-In order that has not been settled is shown. All buttons except for RECALL may be disabled based on the currently logged in user's permissions.



Orders List Options

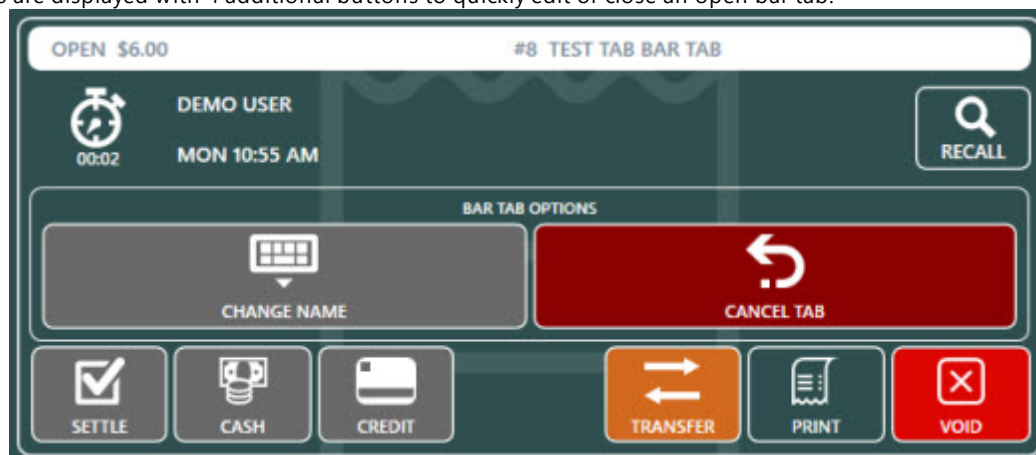
- **RECALL:** Used to open the selected order on the order entry screen.
- **SPLIT:** Used to open the selected order on the split order screen. This button is disabled if the currently logged in user's job type does not have the Allow Split permission set to Yes. This button is disabled for bar tabs (see [CANCEL TAB](#) <sup>107</sup> below).
- **COMBINE:** Used to open the selected order on the combine order screen. This button is disabled if the currently logged in user's job type does not have the Allow Combine permission set to Yes. This button is disabled for bar tabs (see [CANCEL TAB](#) <sup>107</sup> below).
- **TRANSFER SERVER/TRANSFER DRIVER:** Used to transfer the order to another server. For delivery orders, the button appears with the text TRANSFER DRIVER and is used to transfer the order to another driver. This

button is disabled if the currently logged in user's job type does not have the Allow Transfer permission set to Yes. Note that orders can also be transferred on the Manager screen.

- **SETTLE:** Used to open the selected order on the settle screen. This button is disabled if the currently logged in user's job type does not have the Allow Settle permission set to Yes.
- **SETTLE CASH:** Used to open the selected order on the settle screen with the cash payment method selected. This button is disabled if the currently logged in user's job type does not have the Allow Settle Cash permission set to Yes.
- **SETTLE CREDIT:** Used to open the selected order on the credit card transaction screen (or on the settle screen with the credit card payment method selected for manual credit card users). This button is disabled if the currently logged in user's job type does not have the Allow Settle Credit permission set to Yes.
- **SERVER BANK/DRIVER BANK:** Used to add the order to the server's liabilities and remove the order from the current orders list. The server bank button is visible only when Server Banking is enabled. The driver bank button is visible only for delivery orders. The driver bank button is equivalent to checking in an order on the New Delivery screen.
- **CUSTOMER RECEIPT:** Used to print a customer receipt for the selected order. This button is disabled if the currently logged in user's job type does not have the Allow Reprint permission set to Yes.
- **PREP TICKETS:** Used to send the order to the prep printers (or un-bump the order on the remote display). This button is disabled if the currently logged in user's job type does not have the Allow Prep Reprint permission set to Yes.
- **WEB STATUS:** Used to open the selected order on the web order status screen. This button is enabled only for web orders.
- **VOID:** Used to void the order so that it is removed from the server's liabilities. The order is removed from the list and archived when the next end of day is run. This button is disabled if the currently logged in user's job type does not have the Allow Void permission set to Yes.

### Bar Tabs

Bar tabs are displayed with 4 additional buttons to quickly edit or close an open bar tab.



**Bar Tab Options**

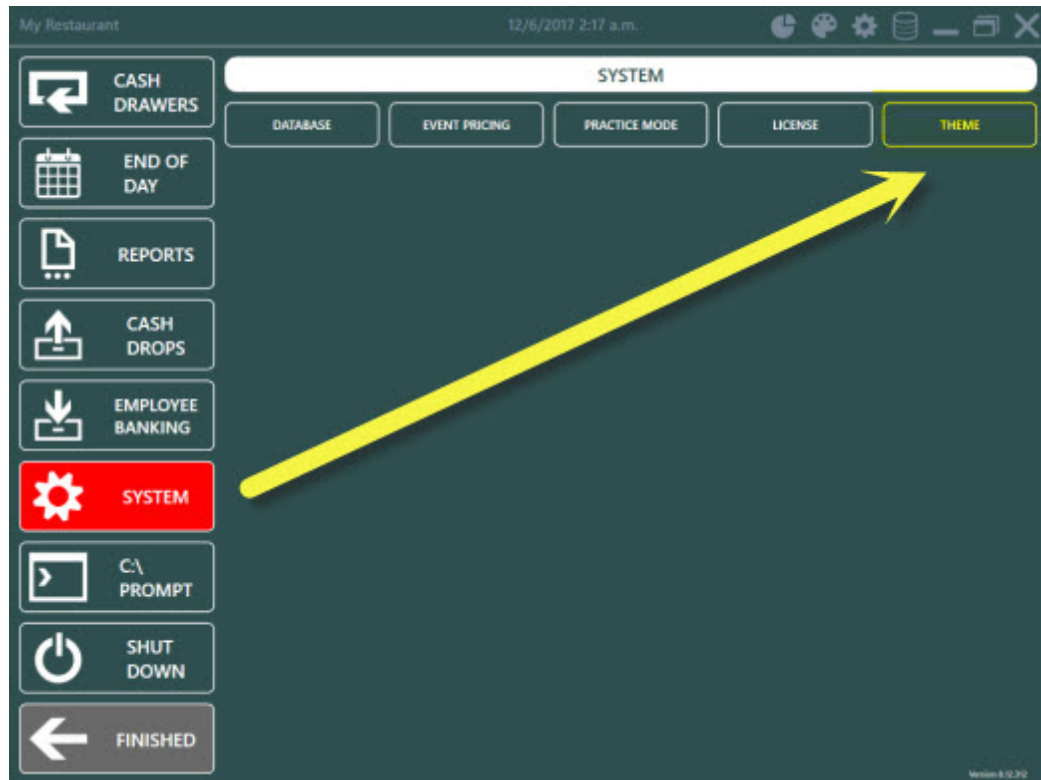
- **ADD GRATUITY:** Used to open the order on the Add Gratuity screen for a pre-authorized bar tab. This button is disabled if the bar tab was not pre-authorized.
- **SIGNATURE SLIP:** Used to print a signature slip for a pre-authorized bar tab. This button is disabled if the bar tab was not pre-authorized.
- **CHANGE NAME:** Used to display the on-screen keyboard to change the customer's name.
- **CANCEL TAB:** Used to convert the bar to a regular order so that the order can be combined or split. Cancelling a tab does not void the order or any payments or pre-auth transactions.

Part 5

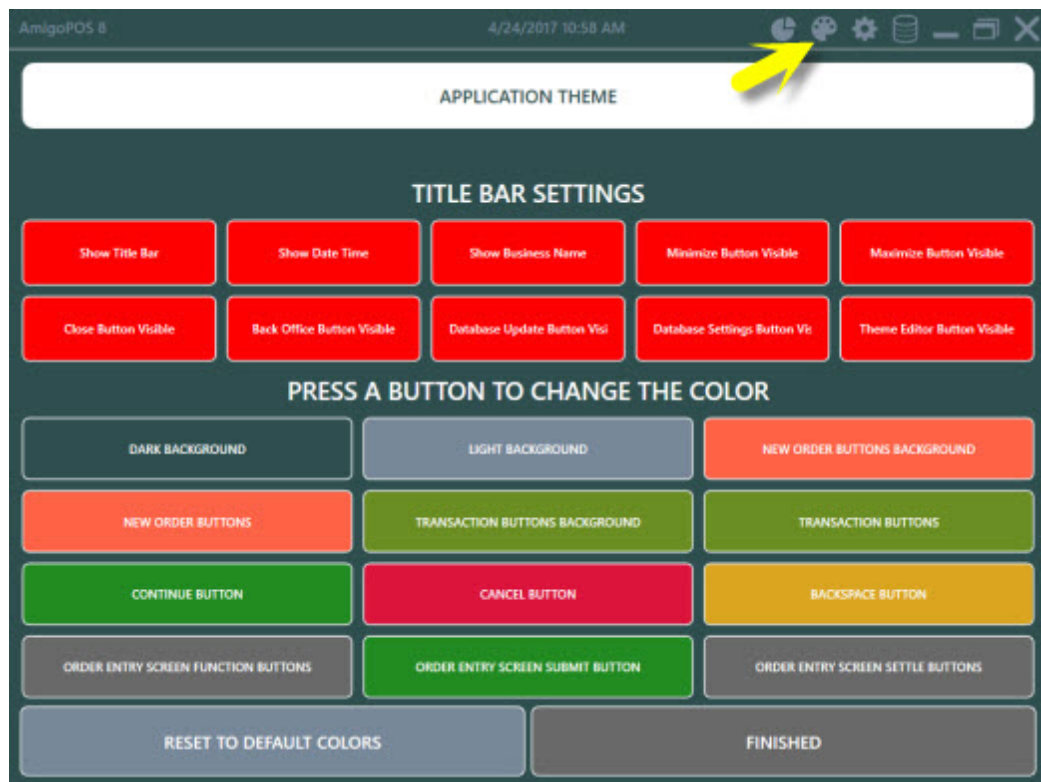
# Theme & Colors

## 5 Theme & Colors

Most [application colors](#)<sup>[110]</sup> and [title bar](#)<sup>[110]</sup> components can be customized on the manager screen under system/theme and from the theme editor icon in the title bar.



Manager Screen



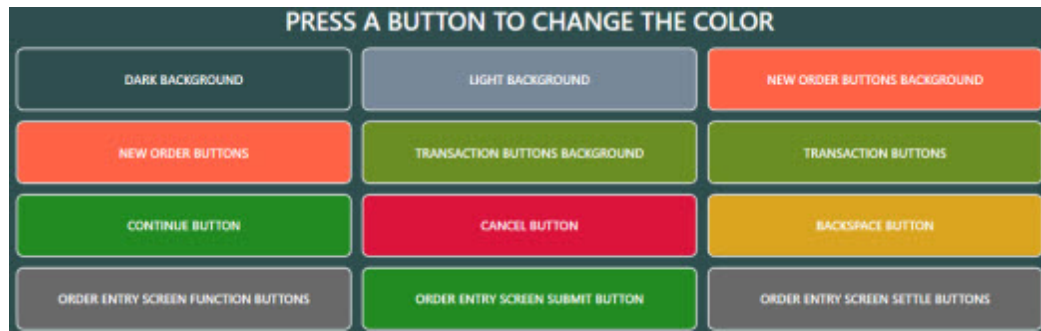
Title Bar

### Title Bar Settings



- **Show Title Bar:** Set to Yes to display the title bar at the top of the pos application.
- **Show Date Time:** Set to Yes to display the date and time in the title bar.
- **Show Business Name:** Set to Yes to display the business name in the title bar.
- **Show Minimize Button:** Set to Yes to display the minimize button in the title bar.
- **Show Maximize Button:** Set to Yes to display the maximize button in the title bar.
- **Show Close Button:** Set to Yes to display the close button in the title bar.
- **Show Back Office Button:** Set to Yes to display the back office button in the title bar.
- **Show Database Update Button:** Set to Yes to display the database update button in the title bar.
- **Show Database Settings Button:** Set to Yes to display the database settings button in the title bar.
- **Show Theme Editor Button:** Set to Yes to display the theme editor button in the title bar.

### Application Theme



- **Dark Background:** Background color to use for dark screen areas.
- **Light Background:** Background color to use for light screen areas.
- **Backspace Button:** Color to use for backspace button
- **Cancel Button:** Color to use for cancel button
- **Continue Button:** Color to use for continue button
- **New Order Button Background:** Color to use for start screen new order buttons background
- **New Order Button:** Color to use for start screen new order buttons
- **Order Entry Screen Function Buttons:** Color to use for order entry screen function buttons
- **Order Entry Screen Settle Buttons:** Color to use for order entry screen settle buttons
- **Order Entry Screen Submit Button:** Color to use for order entry screen submit button
- **Transaction Background:** Color to use for start screen transaction buttons background
- **Transaction Buttons:** Color to use for start screen transaction buttons
- **Transaction Buttons Background:** Background color to use for start screen transaction buttons background

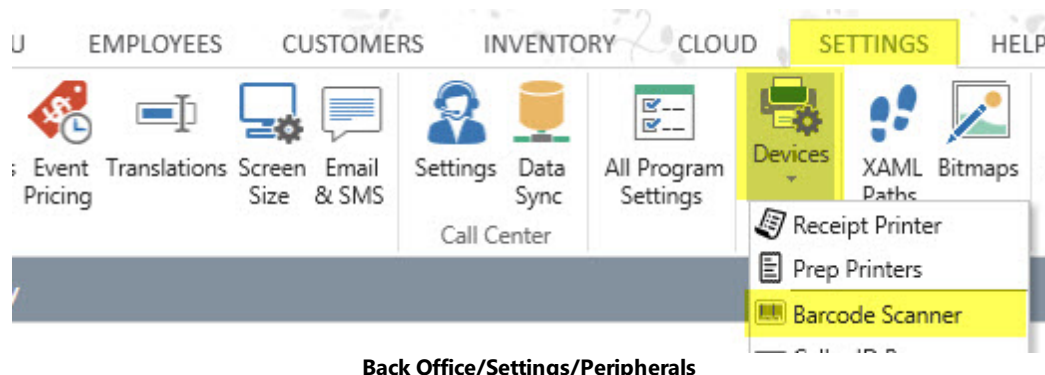
Part 6

# Devices

## 6 Devices

### 6.1 Barcode Scanner

AmigoPOS includes support for keyboard wedge (USB or PS2), OPOS or serial port barcode scanners.



Select the scanner type to view additional details:

- [Keyboard Wedge](#) <sup>113</sup>
- [OPOS](#) <sup>114</sup>
- [Serial Port](#) <sup>115</sup>

#### Keyboard Wedge (KBW) Scanners

**Note for keyboard wedge interface scanner and magnetic card reader users:** AmigoPOS supports both keyboard wedge magnetic card readers and keyboard wedge scanners. The output from keyboard wedge devices appears as text typed from a keyboard to both Windows and AmigoPOS. Since AmigoPOS does not force the user to select a text box or open a popup window before scanning a barcode or swiping a credit card, AmigoPOS must be able to determine if the output is from a magnetic card reader or barcode scanner. The simplest method is to append a character to the end of the barcode scan and append a single carriage return to the end of the card swipe.

The keyboard wedge scanner should be configured to send a special character after the barcode is scanned. It should **not** send a carriage return <CR> after the scan. AmigoPOS is already configured to recognize the ~ (tilda) as the special character. This character can be changed if necessary. Select **Keyboard Wedge** next to **Scanner** type in Back Office/Settings/Peripherals/.

Most manufacturers provide a pdf program manual that can be downloaded from the manufacturer's web site, enabling you to print a series of barcodes that can be used to program the scanner. In general, the programming procedure consists of:

1. Enter setup mode
2. Restore default settings
3. Remove trailing carriage return
4. Add termination character (i.e. tilda)
5. Exit setup mode

Some scanners do not require all of the above steps. For example, the POS-X Xi3000 does not require the removal of the carriage return, as shown in the [Xi3000 configuration sheet](#) (printable pdf).

**Right Way**



Correct output in notepad from barcode scanner with no carriage return so that the cursor remains on the same line (the gray character is the screen cursor):

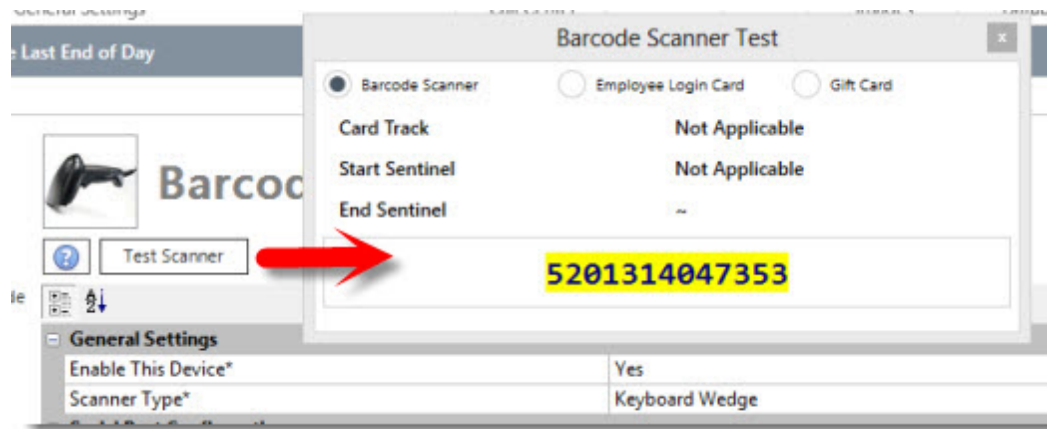
123456~ |

### Wrong Way

Incorrect output in notepad from barcode scanner with carriage return so that the cursor jumps to the next line (the gray character is the screen cursor):

123456  
|

After the scanner is programmed to suppress the carriage return and to send a termination character, click the Test Scanner button to confirm that the scanner is programmed correctly, as shown below. Note that the termination character does not appear in the scan. AmigoPOS always strips the termination character before displaying the barcode scan on any back office or front of house screen.



**Keyboard Wedge Barcode Scanner Test**

### OPOS Scanners

When installing a serial port barcode scanner that has manufacturer support for OPOS drivers, download and install the manufacturer's OPOS device drivers and setup utility. For example, Symbol barcode scanner users should download both the **123Scan Scanner Configuration Utility** and the **OPOS Driver for Symbol Scanners**. Metrologic barcode scanner users should download the **Metroset 2** configuration utility and **MetroPOS 2** (contains both Metrologic OPOS drivers and the MetroPOS Administrator).

Using the configuration utility, the scanner should be programmed to:

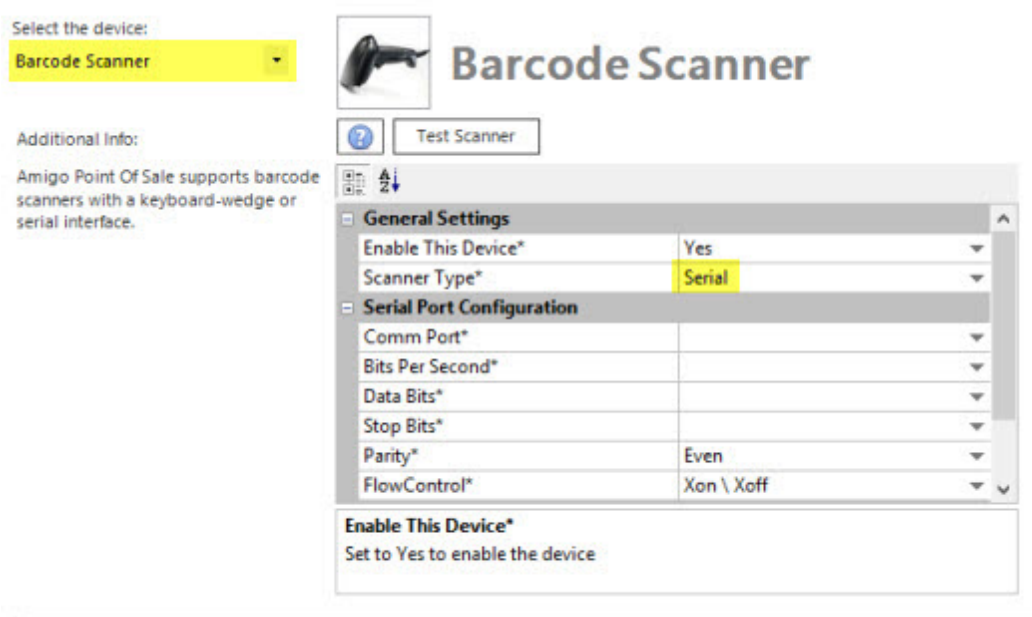
- Send a carriage return <CR> after each scan
- Interpret Code 39 barcodes

Many scanners are already programmed to recognize Code 39 barcodes and send a carriage return after each scan. If unsure, open the MS Windows HyperTerminal program and connect to the barcode scanner's COM port. Print a customer receipt from AmigoPOS and scan the barcode into HyperTerminal.

After the scanner is configured, open the OPOS configuration utility and add the barcode scanner with a user-friendly device name. This is similar to the procedure for [counter scale installation](#)<sup>[268]</sup>. Select **OPOS** next to **Scanner** type in Back Office/Settings/Peripherals/.

### Serial Port Scanners

AmigoPOS can communicate with the scanner directly through the serial port. Select **Serial** next to **Scanner** type in Back Office/Settings/Peripherals/. Program the scanner to send a single carriage return after the scan. No other special termination characters are required. The default settings 9600,8,N,1 with no flow control are appropriate for most barcode scanners. Open Windows Device Manager to verify that the serial port settings match the scanner interface settings.



Select the device:

Barcode Scanner

Additional Info:

Amigo Point Of Sale supports barcode scanners with a keyboard-wedge or serial interface.

Barcode Scanner

Test Scanner

**General Settings**

Enable This Device*	Yes
Scanner Type*	Serial

**Serial Port Configuration**

Comm Port*	
Bits Per Second*	
Data Bits*	
Stop Bits*	
Parity*	Even
FlowControl*	Xon \ Xoff

**Enable This Device\***

Set to Yes to enable the device

### Serial Interface Scanner Configuration

Most serial barcode scanners offer a user manual with instructions on adding a carriage return by scanning a series of barcodes. For example, the Motorola Symbol LS9208 serial port scanner (and similar Symbol scanners) with default factory configuration can be programmed to send a carriage return after the barcode by printing this topic and scanning the following 3 barcodes, one at a time, in the order shown.

1. &lt;SCAN OPTIONS&gt;



2. &lt;DATA&gt; &lt;SUFFIX&gt;



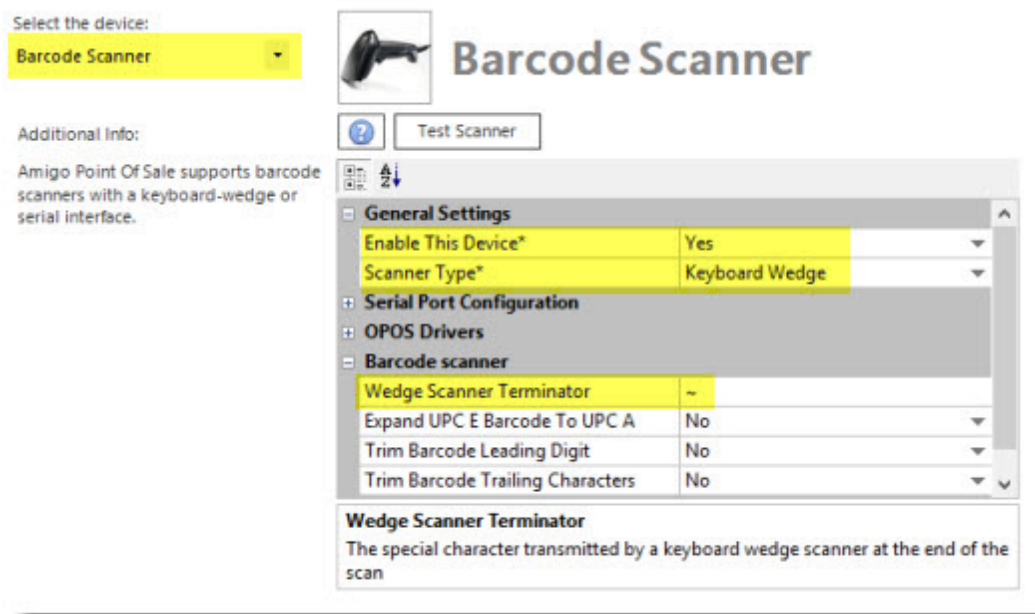
3. ENTER

**Symbol LS9208 Carriage Return****Back office Configuration**

Enable the barcode scanner in Back Office/Settings/Peripherals/ by selecting the correct scanner type and entering the OPOS name or Serial Port settings, where applicable. Refer to the following images for the most common configurations.

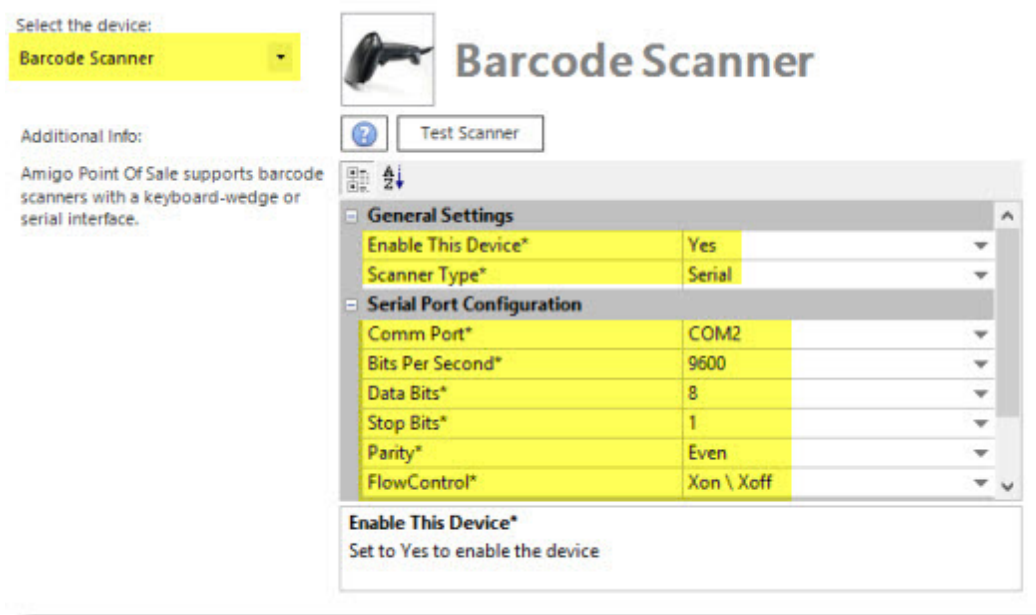
Keyboard Wedge Scanner

The wedge scanner shown below has a tilda (~) terminator

**Keyboard Wedge Barcode Scanner Configuration**

### Serial Port Scanner

The serial port scanner shown below is connected to COM Port 2 and uses default settings (9600,8,N,1)



Select the device:  
Barcode Scanner

Additional Info:  
Amigo Point Of Sale supports barcode scanners with a keyboard-wedge or serial interface.

Barcode Scanner

Test Scanner

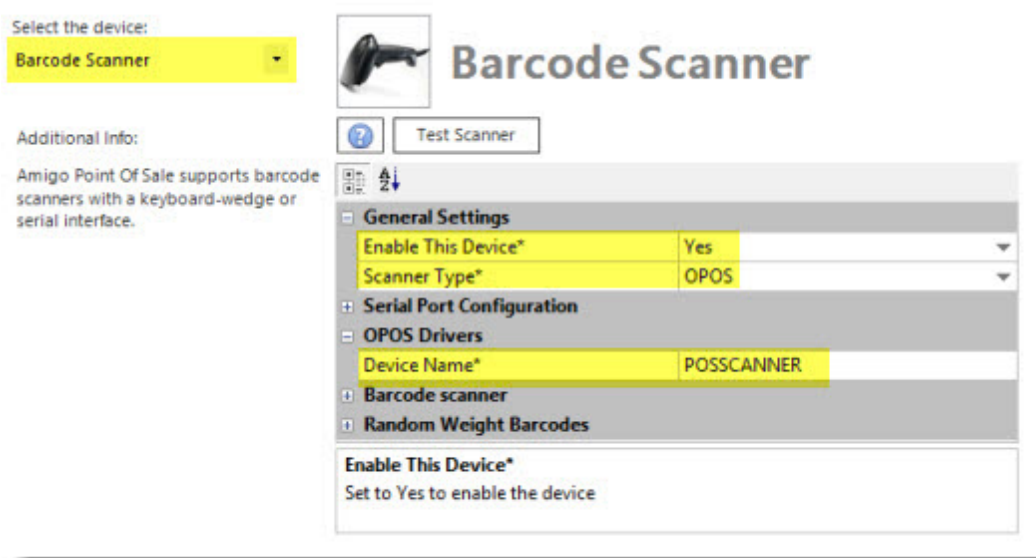
General Settings	
Enable This Device*	Yes
Scanner Type*	Serial
Serial Port Configuration	
Comm Port*	COM2
Bits Per Second*	9600
Data Bits*	8
Stop Bits*	1
Parity*	Even
FlowControl*	Xon \ Xoff

Enable This Device\*  
Set to Yes to enable the device

Serial Interface Barcode Scanner Configuration

### OPOS Scanner

The OPOS scanner shown below is configured with device name **POSSCANNER**.



Select the device:  
Barcode Scanner

Additional Info:  
Amigo Point Of Sale supports barcode scanners with a keyboard-wedge or serial interface.

Barcode Scanner

Test Scanner

General Settings	
Enable This Device*	Yes
Scanner Type*	OPOS
Serial Port Configuration	
OPOS Drivers	
Device Name*	POSSCANNER
Barcode scanner	
Random Weight Barcodes	

Enable This Device\*  
Set to Yes to enable the device

OPOS Barcode Scanner Configuration

## 6.2 Caller Id Box

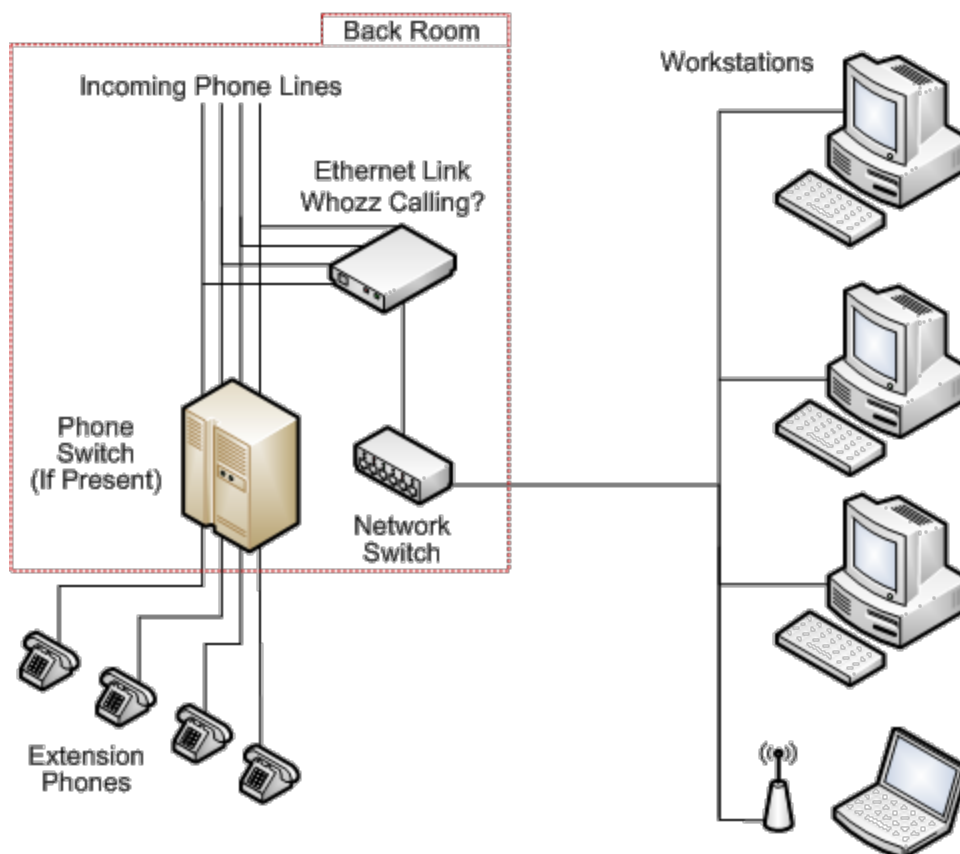
### Caller ID Box Configuration & Usage

#### Initial Setup

AmigoPOS can display incoming call information by utilizing the Whoozit® caller id box, available at <http://www.callerid.com> (AmigoPOS is not affiliated with callerid.com). Units are available for 1-8 lines and are capable of displaying a callers name and the line number. A single unit will share data with all pos stations on the network and the units may be interconnected for an unlimited number of lines. AmigoPOS maintains a record of customers' previous orders so that you will have access to a customer's previous activity while the phone is still ringing.

Callerid boxes are available with a choice of 2 interfaces:

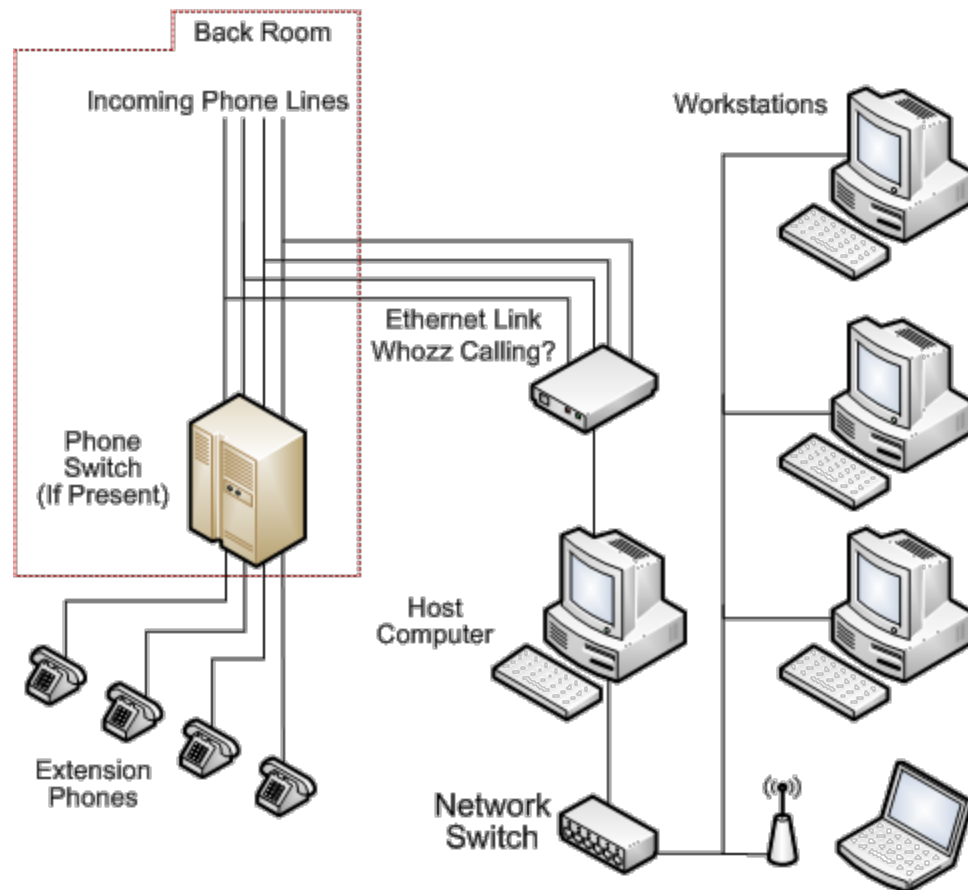
1. **Ethernet** (Recommended): This type of box is connected directly to the network router and is easy to set up with AmigoPOS by simply enabling the device and entering the port number (default port 3520). Note that in order to avoid duplicate entries in the caller id log, only Pos Station 1 is used to save new calls to the caller id log when using the Ethernet Link caller id box.



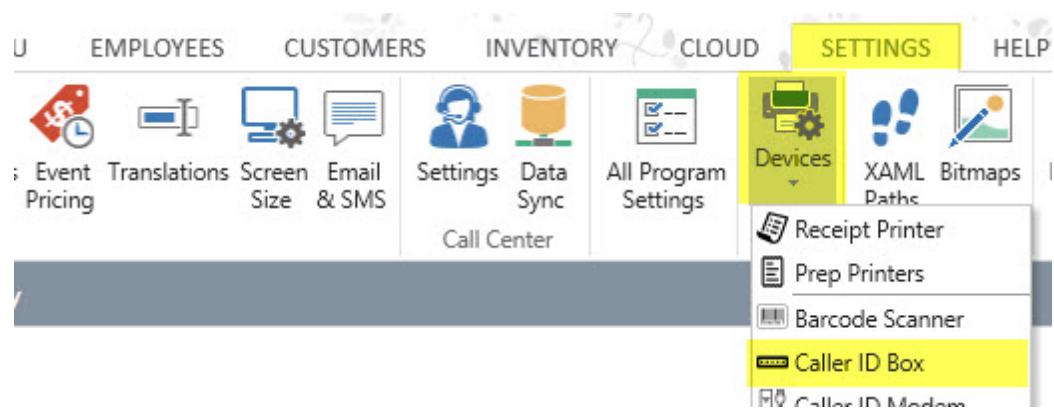
The Ethernet Link version connects directly to the network, sending information to all computers at the same time (image courtesy callerid.com)

•

2. **Serial Port**: This type of box is connected directly to a pos station or back office pc, which then broadcasts the callerid data to other network pcs.



The serial port version connects to a single host computer. The host relays information to other computers on the network (image courtesy callerid.com)



Back Office/Settings/Peripherals

Select the device:

Caller ID Box

Additional Info:

Amigo Point Of Sale supports any Whozz Calling?™ caller id box. View the Delivery settings screen for phone number formatting options.

**Caller ID Box**

General Settings	
Enable This Device*	Yes
CallerID Type*	Whozz Calling ?™
Interface*	Serial Port
Local Device*	Yes

Broadcast	
Broadcast Enabled*	Yes
Network Port*	3520

**Local Device\***  
Specify whether the caller id box connected to the serial port on this station.

#### Caller Id Box Configuration (Serial Port)

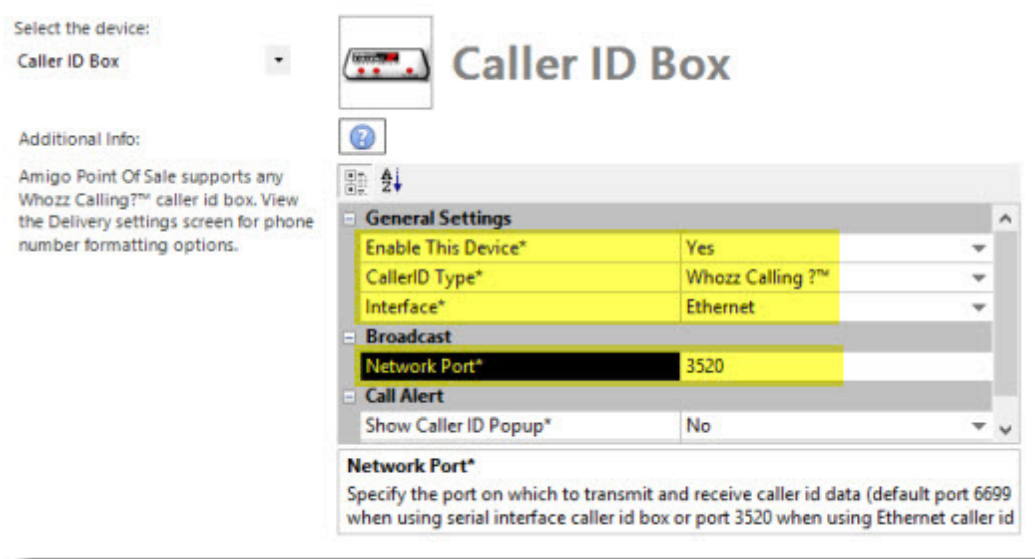
Although only one caller id unit is required for the entire network, the caller id settings must be configured on each POS station. First, install your caller id unit and be sure that all phone lines are securely inserted into the rear of the box, in consecutive order. If the number of lines is less than the maximum capacity, the highest numbered port will remain unused (for example, if you are using a 4-line box but only have 3 phone lines, the RJ11 port labeled Line 4 on the rear of the box is not used). Connect the serial cable from the box to the POS station and connect the AC adapter. If the pos station does not have a free serial port, obtain a USB to Serial port converter.

After logging in as a manager or supervisor, open Back Office/Settings/Peripherals/ and select Caller Id from the drop-down list. First, check the box next to **Enable this device**. If the caller id unit is physically connected with an (RS-232 serial cable) to the pos station that you are configuring, select **Yes** next to **Local Device** (if the caller id unit is connected to another pos station, you select **No**).

Serial port settings should be copied from the serial port's settings window in the MS Windows Device Manager (default settings are **9600** Baud, **8** Data Bits, **No** Parity, **1** Stop Bit). If there are multiple pos stations on the network, select **Yes** next to **Broadcast Enabled** and enter a free network port (**the default broadcast port is 6699**). Repeat on any additional pos stations, setting the value for **Local Device** to **No**.

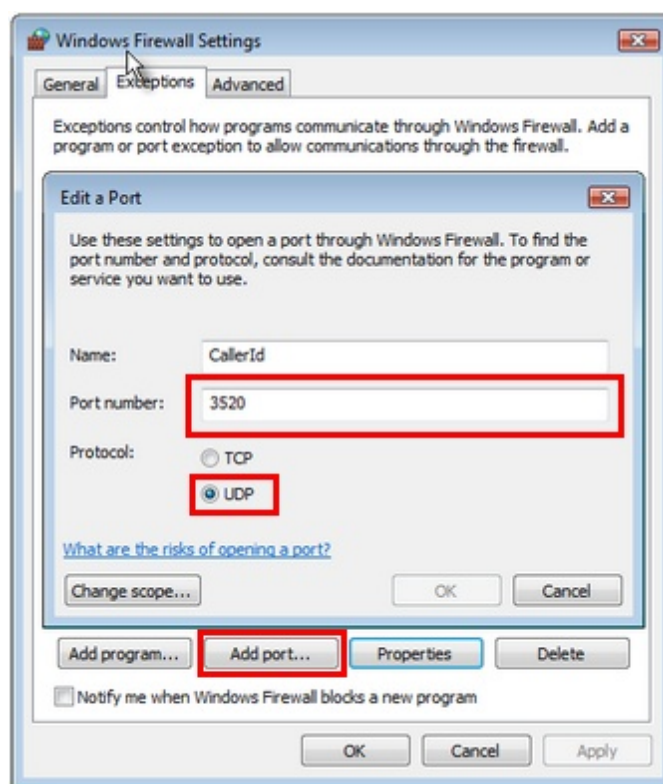
#### Ethernet Interface

[CallerId.Com](http://CallerId.Com) Ethernet Link caller id boxes eliminate the need to connect the caller id box directly to the PC and instead are connected directly to the router. The settings on each PC are identical. Navigate to Back Office/Settings/Peripherals/ and select Caller Id from the drop-down list. Select Yes to enable the device, Specify the Ethernet interface and enter 3520 as the port number as shown below. The next paragraph describes the procedure to add a firewall exception, a necessary step for proper operation.



### Ethernet Caller Id Box Configuration

Finally, add an exception to the Windows Firewall to open port number **3520** using the UDP (not TCP) protocol. The firewall settings can be accessed from the Windows Control Panel > Network and Sharing Center (or right-click on the desktop Network icon and select properties to open the Network and Sharing Center). Click [here](#)<sup>[122]</sup> for instructions on adding a Windows 7 firewall exception.



### Adding an exception to the Windows Firewall

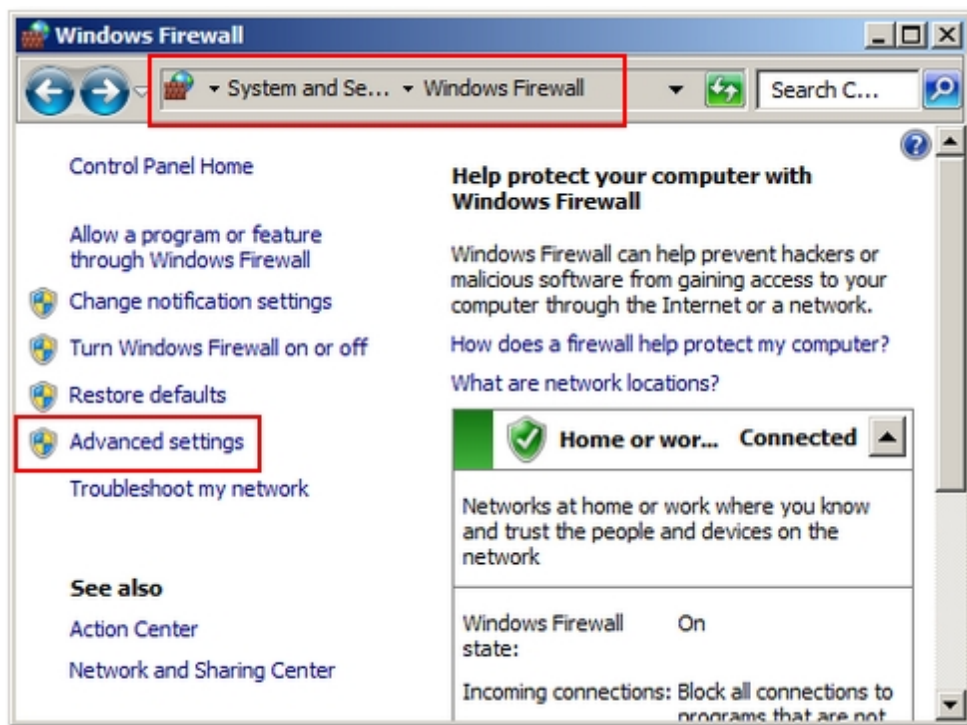


### Usage

After the caller unit is configured, exit back office and restart AmigoPOS. Call any of the connected lines and a small message window will appear at the bottom of the screen indicating the name and the phone number of the incoming caller. Press the Delivery or Pick Up order type to view a list of the 20 most recent calls.

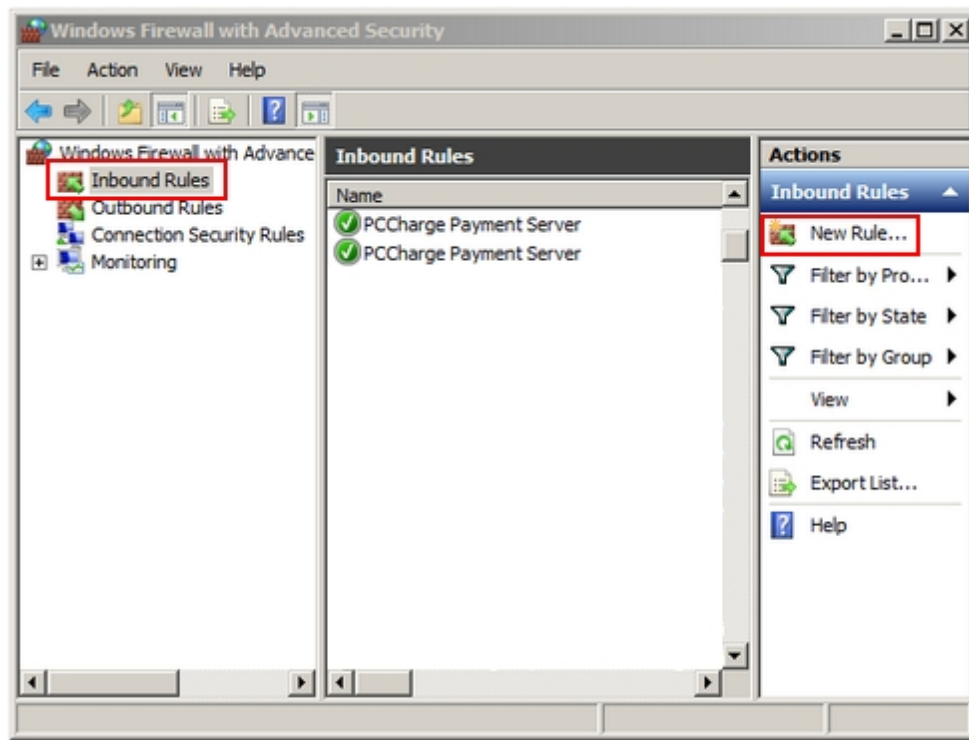
## 6.2.1 CallerId Firewall Exception

The following procedure can be used to add a firewall exception for the Whozz Calling?™ CallerId box or other application features that require a firewall exception. To add a firewall exception in Windows 7, open the Control Panel > Windows Firewall applet. Click Advanced Settings.



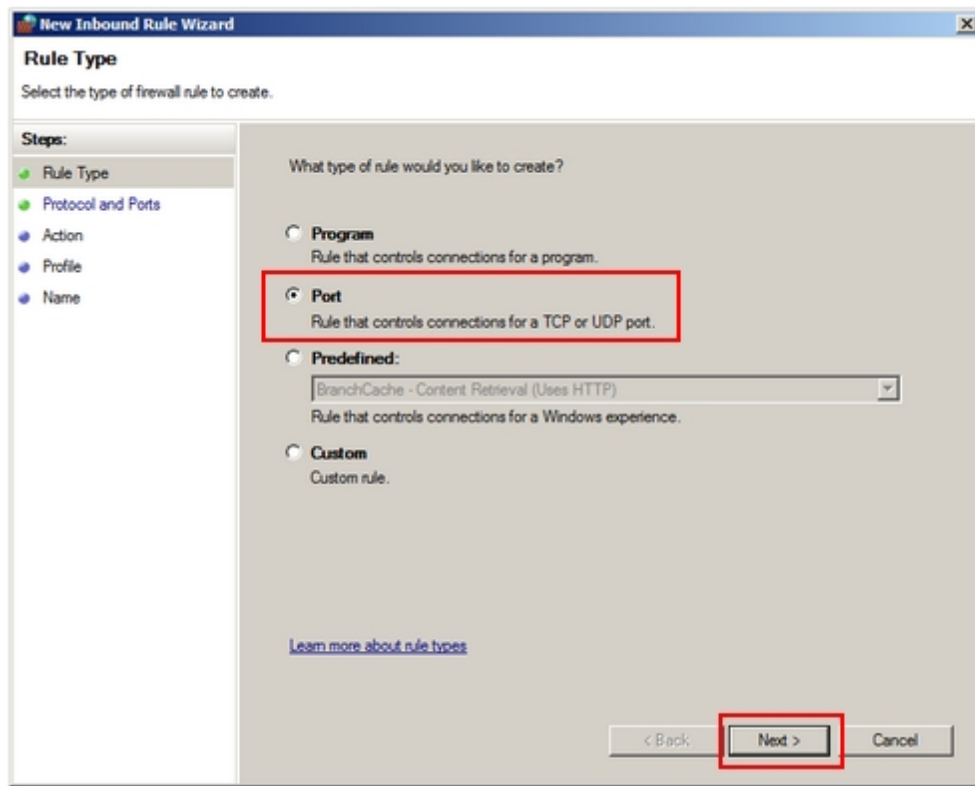
**Windows 7 Firewall Control Panel Applet**

The CallerId box requires an inbound exception. Click **New Rule...** on the right.



Firewall Advanced Settings

Select Port and click **Next**.



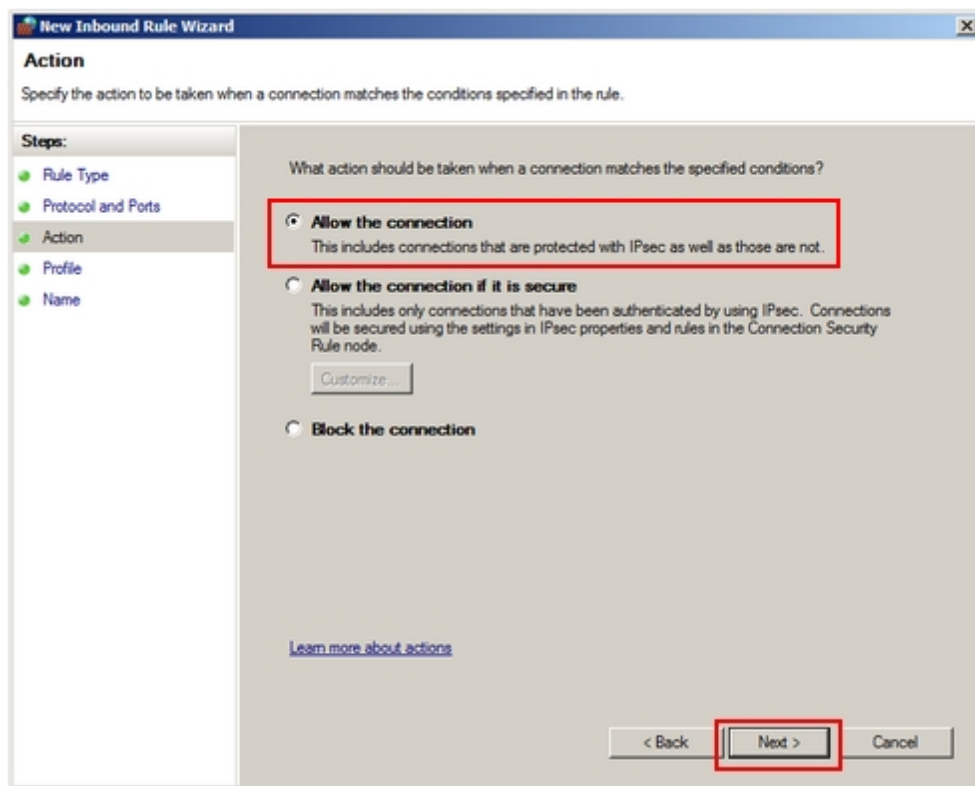
#### Specify the Port Rule Type

Select **UDP**, enter the port number (the default port for the callerid.com Ethernet device is 3520) and click **Next**.

The screenshot shows the 'New Inbound Rule Wizard' window, specifically the 'Protocol and Ports' step. The window has a title bar 'New Inbound Rule Wizard' and a close button. Below the title bar is the section 'Protocol and Ports' with the instruction 'Specify the protocols and ports to which this rule applies.' On the left, a 'Steps:' pane shows a list of steps: 'Rule Type' (selected with a green dot), 'Protocol and Ports' (selected with a green dot), 'Action', 'Profile', and 'Name'. The main area contains two questions. The first question is 'Does this rule apply to TCP or UDP?' with two radio buttons: 'TCP' and 'UDP'. The 'UDP' radio button is selected and highlighted with a red rectangle. The second question is 'Does this rule apply to all local ports or specific local ports?' with two radio buttons: 'All local ports' and 'Specific local ports:'. The 'Specific local ports:' radio button is selected and highlighted with a red rectangle. Next to it is a text input field containing '3520'. Below the input field is an example: 'Example: 80, 443, 5000-5010'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a red rectangle. A link 'Learn more about protocol and ports' is located below the second question.

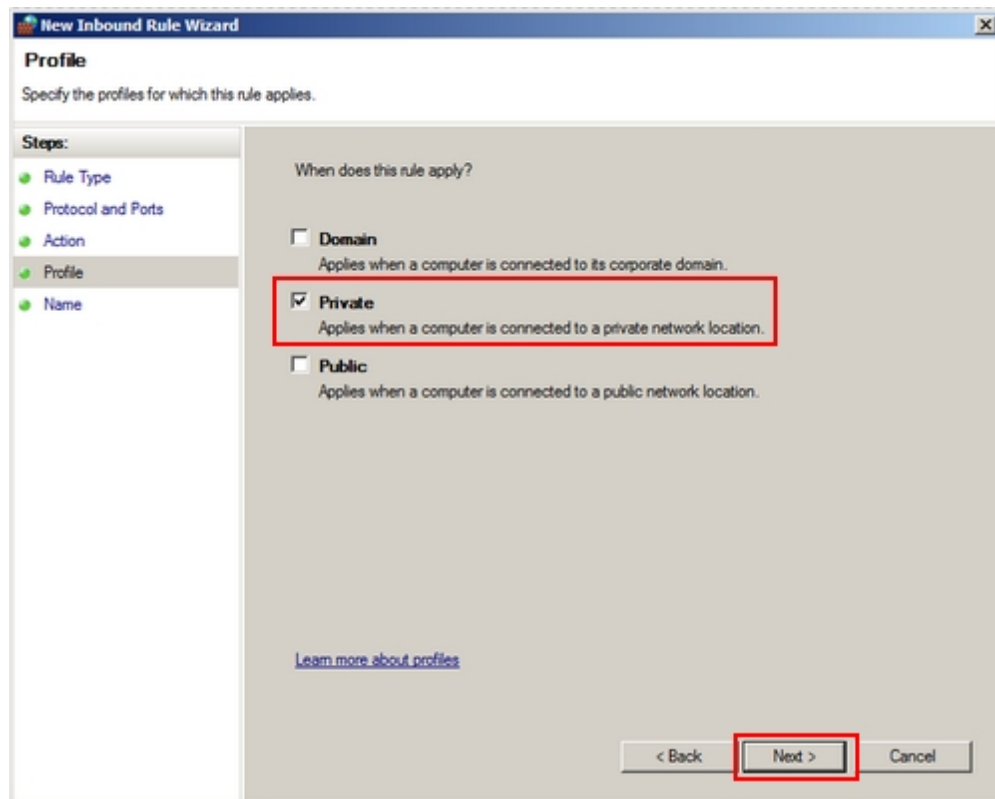
**Enter the UDP Port Number**

Use the default Action setting and click **Next**.



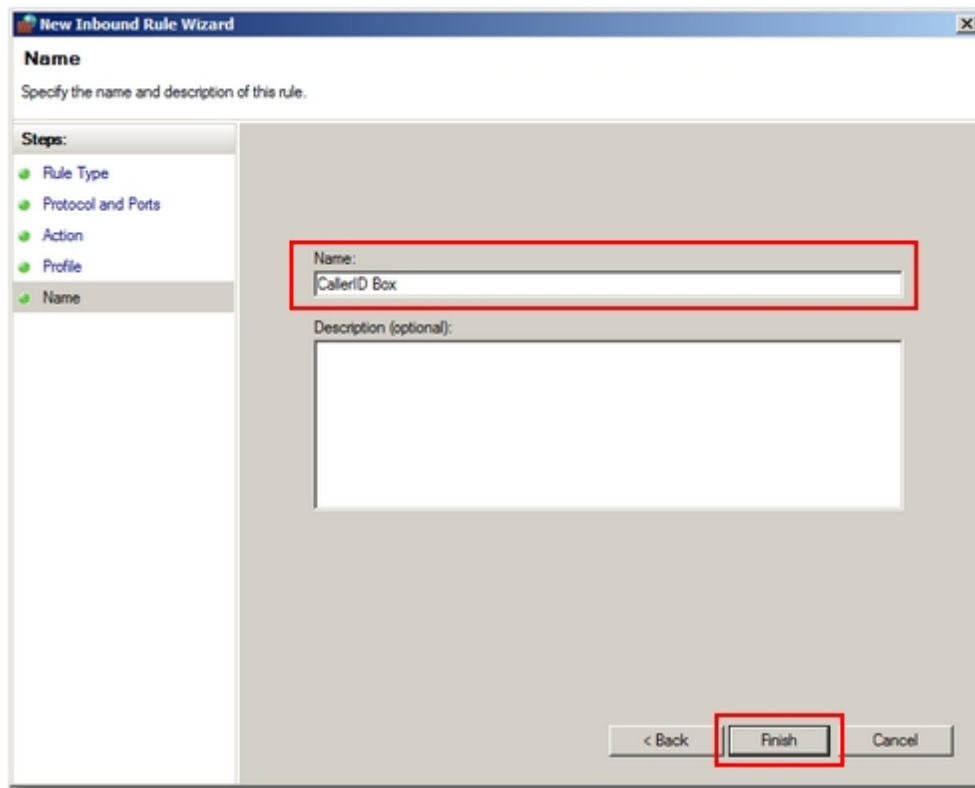
### Specify the Action

Select Private network and click **Next**.



**Select Private Network Type**

Enter a friendly name for the rule and click **Finish**. The new rule works immediately and does not require a program restart.

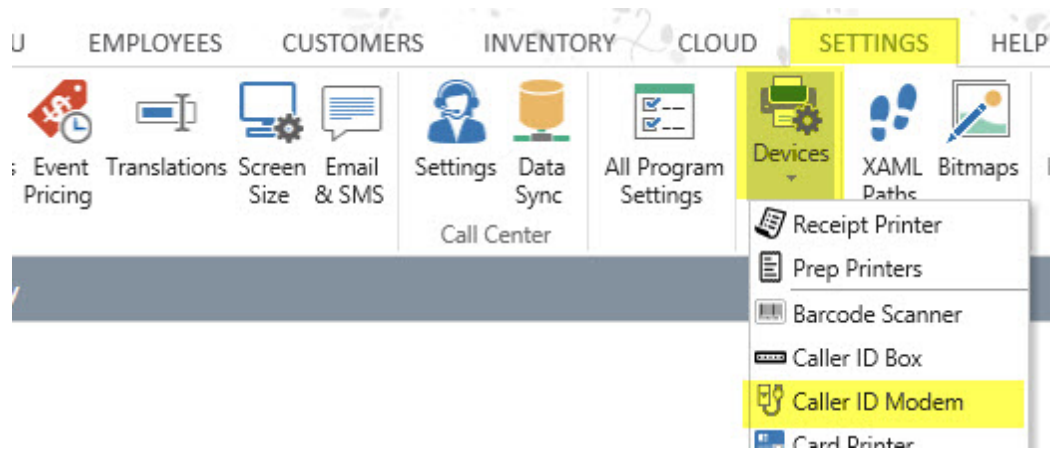


Enter a Rule Name

## 6.3 Caller Id Modem

AmigoPOS supports a single caller id enabled modem per pos station or back office pc. The default settings are intended for users in North America. Other users may wish to enable debug mode so that each callerid modem event is recorded in the program error log. The settings are not stored in the database and must be configured at each pos station independently.

### Settings



Back Office/Settings/Peripherals

<b>General Settings</b>	
Enable This Device*	Yes
Broadcast Enabled*	Yes
Network Port*	3520
<b>Call Alert</b>	
Show Caller ID Popup*	Yes
<b>Serial Port Configuration</b>	
Comm Port*	5
Bits Per Second*	9600
Data Bits*	8
Stop Bits*	1
Parity*	Even
FlowControl*	Hardware
<b>Advanced Settings</b>	
Name String*	NAME
Name String Length*	8
Number String*	NMBR
Number String Length*	8
Date String*	DATE
Date String Length*	8
Time String*	TIME
Time String Length*	8
Modem Initialization*	
Display Only*	No
Debug Mode*	Yes

**CallerID Modem Configuration**

#### **General Settings**

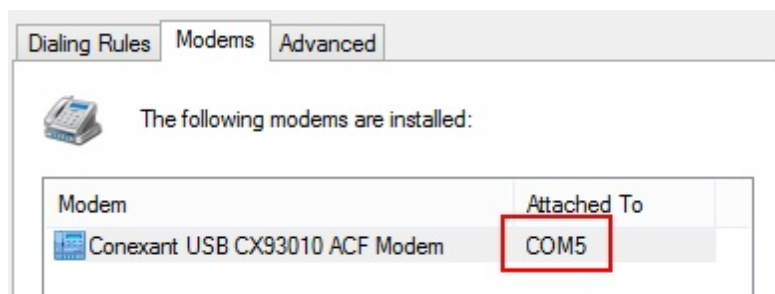
- **Broadcast Enabled:** Set to Yes to transmit the callerid data over the network.
- **Network Port:** Enter the network port on which to broadcast the callerid data so that other pos stations can display the callerid popup (the default port is 3520). Add a firewall exception to allow UDP communications on the network port.

#### **Call Alert**

Show Caller ID Popup: Set to Yes to enabled the callerid popup to appear when a call is received. Note that the call is saved to the database even when this setting is disabled (the Display Only setting is used to prevent the call data from being saved to the database).

#### **Serial Port Configuration**

Open the Windows Control Panel > Phone and Modems applet to determine the comm port used by the modem. The other serial port settings can be ignored for most modems.



**Windows Control Panel > Phone and Modem**



**Advanced Settings**

- **Name String:** Enter the text that appears before the name in the callerid modem event, not including the equal sign or space. The value is "NAME" for North America.
- **Name String Length:** Enter the character position where the name begins (count the total number of characters and spaces that appear before the name begins and add 1). For example, "NAME = " is 7 characters; the name string length is 8.
- **Number String:** Enter the text that appears before the phone number in the callerid modem event, not including the equal sign or space. The value is "NMBR" for North America.
- **Number String Length:** Enter the character position where the phone number begins (count the total number of characters and spaces that appear before the phone number begins and add 1). For example, "NMBR = " is 7 characters; the phone number string length is 8.
- **Date String:** Enter the text that appears before the date value in the callerid modem event, not including the equal sign or space. The value is "DATE" for North America.
- **Date String Length:** Enter the character position where the date begins (count the total number of characters and spaces that appear before the date begins and add 1). For example, "DATE = " is 7 characters; the date string length is 8.
- **Time String:** Enter the text that appears before the time value in the callerid modem event, not including the equal sign or space. The value is "TIME" for North America.
- **Time String Length:** Enter the character position where the time begins (count the total number of characters and spaces that appear before the time begins and add 1). For example, "TIME = " is 7 characters; the time string length is 8.
- **Modem Initialization:** If the modem requires initialization, enter the initialization string. For example, some WinModems are initialized using **AT+VCID=1**.
- **Display Only:** Set to No to save the caller id info to the database for each call received. Set to Yes if another Pos Station is saving the data.
- **Debug Mode:** Set to Yes to record each caller id modem event in the program error log to aid in diagnostics. In addition, the complete string received from the callerid modem is saved in the callerid log. This setting should remain disabled if the modem is configured correctly.

With debug mode enabled, place a call to view the data received by the callerid modem. In the example above, the following settings are shown:

- Name String: **NAME**
- Name String Length: **8**. This is the position of the "U" in unavailable.
- Number String: **NMBR**
- Number String Length: **8**. This is the position of the "1" in 18773995335.

```

59:55 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0      OK      Win XP (5.1)
00:49 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0              Win XP (5.1)
00:49 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0      RING      Win XP (5.1)
00:50 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0              Win XP (5.1)
00:50 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0      DATE = 1227      Win XP (5.1)
00:50 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0      TIME = 2001      Win XP (5.1)
00:50 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0      NMBR = 18773995335      Win XP (5.1)
00:50 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0      NAME = Unavailable      Win XP (5.1)
00:55 µµ      NOT AN ERROR->CALLER_ID_MODEM_DIAGNOSTICS0      0              Win XP (5.1)

```

**Program Error Log (Debug Mode Enabled)****Modem Test**

As an alternative to using the program error log, users with access to HyperTerminal can complete the following steps to confirm that the modem is caller id enabled:

1. Navigate to Programs > Accessories > Communications > HyperTerminal
2. Click on the Hyperterminal shortcut
3. For name enter CALLER ID
4. Choose OK
5. From the Connect Using drop down box, pick your modem or the "direct to the Com port X" which your external modem is connected and Click OK
6. Choose OK on the Com Port Settings Screen
7. Enter ATZ followed by the ENTER key You should get an OK (If you do not receive an OK, check to see that your modem is not in use by another program and verify that you selected the correct modem/COM Port for your modem.)
8. Enter **AT#CID=1** and click ENTER. The modem should respond with **OK**. If the modem does not respond with OK, try the following instead of AT#CID=1, one at a time until you receive an OK.
  - AT%CCID=1
  - AT+VCID=1
  - AT#CC1
  - AT\*IC1

If all these fail you can check your modem documentation for additional codes that may work. Your modem may not support caller id. If one of these additional codes does work you must enter the code in the software's Setup.

10. Place a call to your modem and HyperTerminal should display the incoming call data as follows:

```

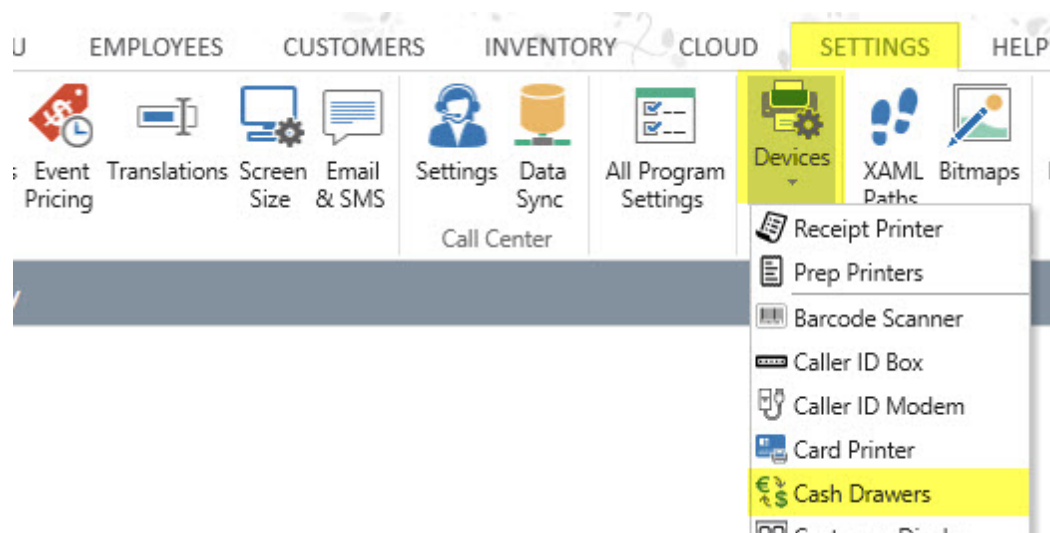
RING
RING
DATE = 0530
TIME = 0131
NMBR = 8777599827
NAME = AMIGO POS
  
```

## 6.4 Cash Drawers

### Cash Drawer Configuration

AmigoPOS is capable of using up to two cash drawers per pos station. For 2-drawer pos stations, both drawers must use the same type of interface and dual cash drawer usage is described in the next [topic](#)<sup>135</sup>. The currently supported cash drawers interfaces are:

- [Printer-Driven](#)<sup>132</sup>
- [OPOS](#)<sup>133</sup>



Back Office/Settings/Peripherals

### Printer-Driven Cash Drawers

A single printer-driven cash drawer connects directly to the printer by using a manufacturer supplied RJ11 cable. If two cash drawers are used on a single pos station, a "Y-Connector" must be used. Cash drawers used for Star and Epson printers are different, although the interface may appear identical and use the same connector (one uses a 12V Solenoid, the other a 24V Solenoid). The two drawer types are NOT interchangeable.

After connecting the cash drawer(s) to the printer, enter the correct codes for your printer/drawer combination. Locate the control codes in your cash drawer/printer documentation and enter the values with each value separated by commas as shown in the list below. If the code contains a letter (A-F), it is in hex and must be converted to decimal. Open the cash drawer by clicking the "Test Drawer" in Back Office/Settings/Peripherals/. If you cannot locate the proper documentation for your equipment, use the following chart as a guide.

Select Device:  
Cash Drawers

**Additional Info:**  
Amigo Point Of Sale supports printer-driven, serial interface or USB (APG® Type) cash drawers

Test Drawer 1  
*\* Local Setting must be configured on each terminal*

**General Settings**  
Number of Drawers\* 1  
Drawer Interface\* Printer Driven

**Drawer Codes**  
Printer Driven Drawer Codes

OPOS Drawer Names

Entering the cash drawer codes for printer-driven cash drawers

Printer Model	Emulation	Drawer 1	Drawer 2
Citizen CBM-230	ESC/POS	27,112,0,50,250	27,112,1,50,250
Citizen CBM-291	ESC/POS	.	.
Citizen iDP-3210	ESC/POS	27,112,0,50,250	27,112,1,50,250
Citizen iDP-33XX, 34XX	ESC/POS	7	.
Citizen CBM-1000	ESC/POS	27,112,0,50,250	27,112,1,50,250
Dell T200	Star	7	.
Epson (Other)	ESC/POS	27,112,48,55,121	.
Epson T88III	ESC/POS	27,112,0,25,250	.
Epson T88IIIP	ESC/POS	27,112,0,64,240	.
Epson T88IV	ESC/POS	27,112,0,64,240	.
Epson TM-U295	ESC/POS	27,112,48,55,121	.
Epson TM-U300PD	ESC/POS	27,112,0,25,250	.
Epson TM-U375	ESC/POS	27,112,0,25,250	.
Epson TM-T883P	ESC/POS	27,112,0,50,250	.
Epson TM-H6000	ESC/POS	27,112,48,55,121	.
Ithaca PcOS 51	ESC/POS	27,112,0,25,250	.
Ithaca PcOS 52	ESC/POS	27,112,0,25,250	.

Ithaca 150	ESC/POS	27,120,1	.
POS-X	ESC/POS	27,112,0,25,250	.
POS-X	ESC/POS	27,112,0,64,240	.
Samsung SRP 270	ESC/POS	27,112,0,25,250	.
Samsung SRP 270A	ESC/POS	27,112,0,64,240	.
Samsung SRP 350	ESC/POS	27,110,0,25,250	.
Samsung (Other)	ESC/POS	27,07,11,55,07	.
Star TSP100	ESC/POS	27,112,0,25,250	.
Star TSP	Star	7	.

### OPOS Drawer Configuration

Using OPOS compatible cash drawers allows AmigoPOS to open almost any cash drawer, regardless of interface. First install the manufacturer's OPOS configuration utility and confirm that the drawer opens properly by using the test function.

**\*Note:** Some OPOS configuration utility installers will overwrite the OPOS components installed with AmigoPOS with an older version. When this occurs, reinstall AmigoPOS to restore the OPOS components to the version required by AmigoPOS.

The example below shows the OPOS Configuration Utility for APG cash drawers. The Device ID is the only value that must be entered in back office, as shown in the last image.

**Modify Cash Drawer Device Settings**

Device ID [Key]:

COM Port Setting  
 HID#: Port:

Communication Settings  
 Baud Rate:   
 Data bits:   
 Stop bits:   
 Parity:   
 Hand Shaking:

Status Indicators  
 Open/close drawer status indicator  
☒ CTS line  
☐ Ring line

Drawer Detail  
 Drawer Number:

Data Transmission  
 First ASCII open drawer character (decimal value):   
 Second ASCII open drawer character (decimal value):

Health Check (Interactive)


Finish Cancel


APG OPOS Configuration Utility

Select Device:


**Cash Drawers**

**Additional Info:**  
 Amigo Point Of Sale supports printer-driven, serial interface or USB (APG® Type) cash drawers

 **Cash Drawers**

 **Test Drawer 1**

*\* Local Setting must be configured on each terminal*

 **A i**

General Settings	
Number of Drawers*	1
Drawer Interface*	OPOS
OPOS Drawer Names	
OPOS Drawer Name(1)*	CD212
OPOS Drawer Name (2)*	

**OPOS Drawer Names**

Back Office OPOS Cash Drawer Configuration

## 6.4.1 Dual Cash Drawer Usage

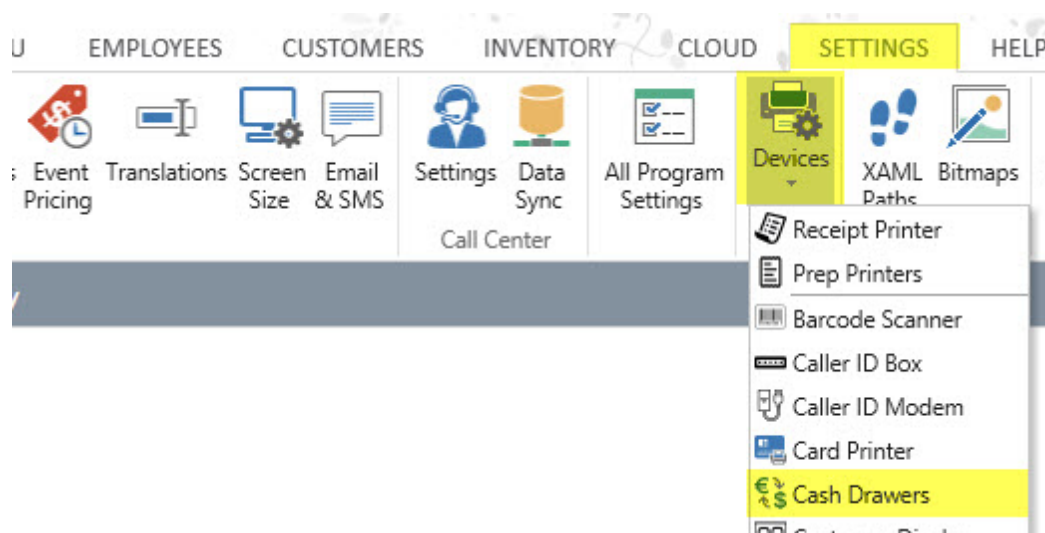
### Dual Cash Drawer Usage

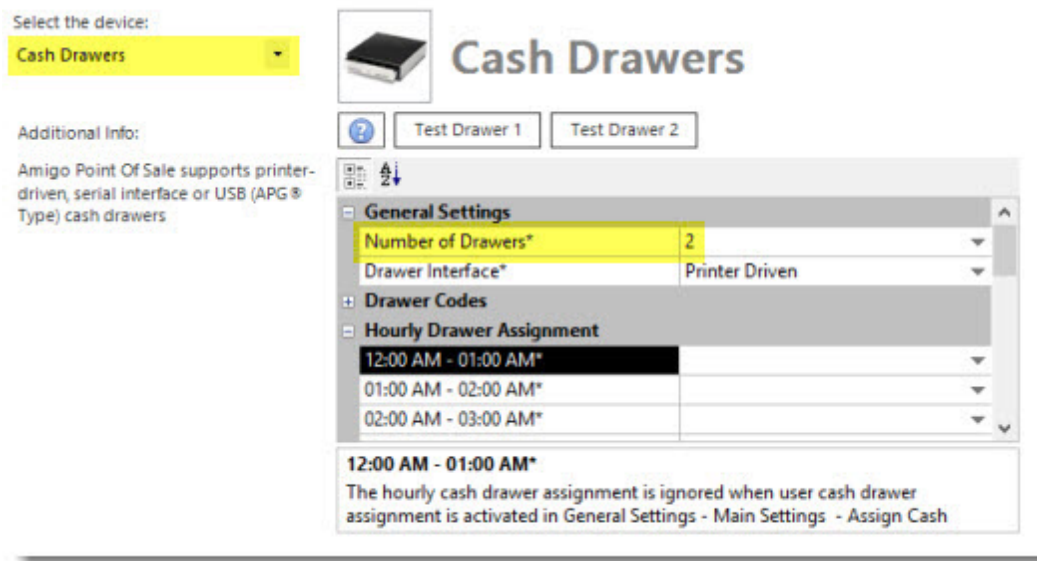
AmigoPOS is capable of using up to two cash drawers per pos station. The following information applies to users with 2 cash drawers connected to a single pos station. Two methods are available for automating cash drawer selection. First, you may configure a cash drawer to open depending on the hour of day. The second option is to configure the cash drawer to open depending on the cashier (or currently clocked-in user). Read below for details on each method. Select **2** next to **Number of Drawers** in Back Office/Settings/Peripherals/ Cash Drawers to use multiple drawers.

#### I. Set Active Cash Drawer Depending On Hour Of Day

This method is useful for businesses with shared cash drawers (i.e. more than one user uses the same drawer), or where the manager is not always available to change the drawer when the shift is over.

To set up the hour for each drawer to open, select **Cash Drawers** from the list in Back Office/Settings/Peripherals/ on the drop-down list and select **2** next to **Number of Drawers**. Scroll down to **Hourly Drawer Assignment** and select the drawer that should open for each hour of the day. These settings must be configured on each pos station independently and are only used when the cash drawer to user assignment is set to No or the current user is not clocked-in.

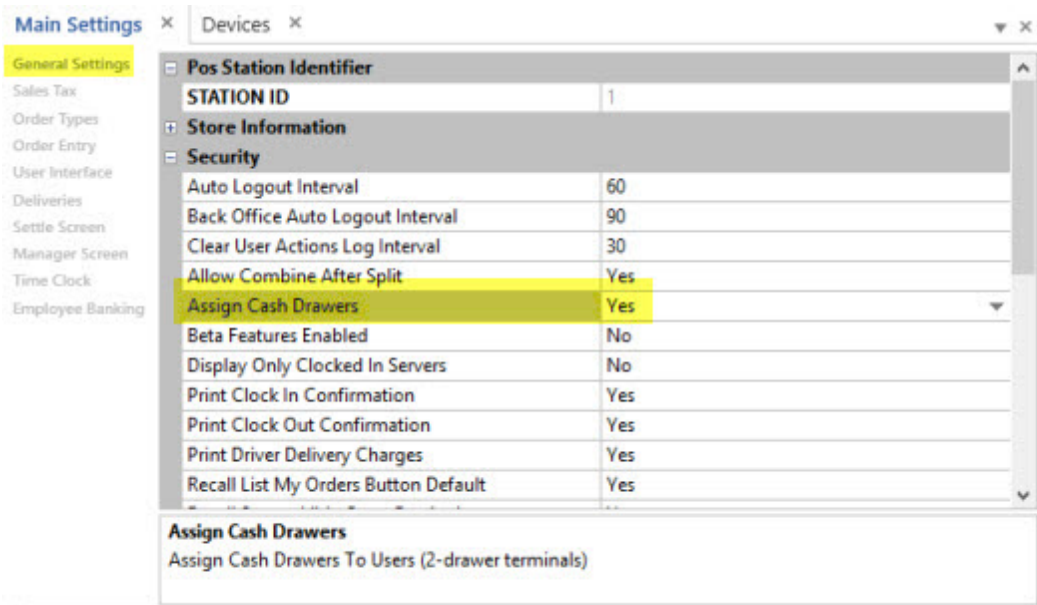




Cash Drawer to Hour Assignments

## II. Set Active Cash Drawer Depending On The User

In Back Office/Settings/Main Settings, click the **General Settings** tab and expand the **Security** category. Select Yes next to Assign Cash Drawers. In **Back Office>Settings>Main Settings>General Settings**, enable the Assign Cash Drawers setting as shown below. In Back Office/Settings/Peripherals/, select **Cash Drawers** from the list in on the left button bar and select **2** next to **Number of Drawers** as shown in the previous image.



Enable Cash Drawer-to-User Assignment

Each employee that will use the cash drawers is required to use the time clock. Set the Time Clock Mandatory setting for each employee in the employee editor as shown below.

Employee Editor Mandatory Time Clock

#### Employee Editor Mandatory Time Clock

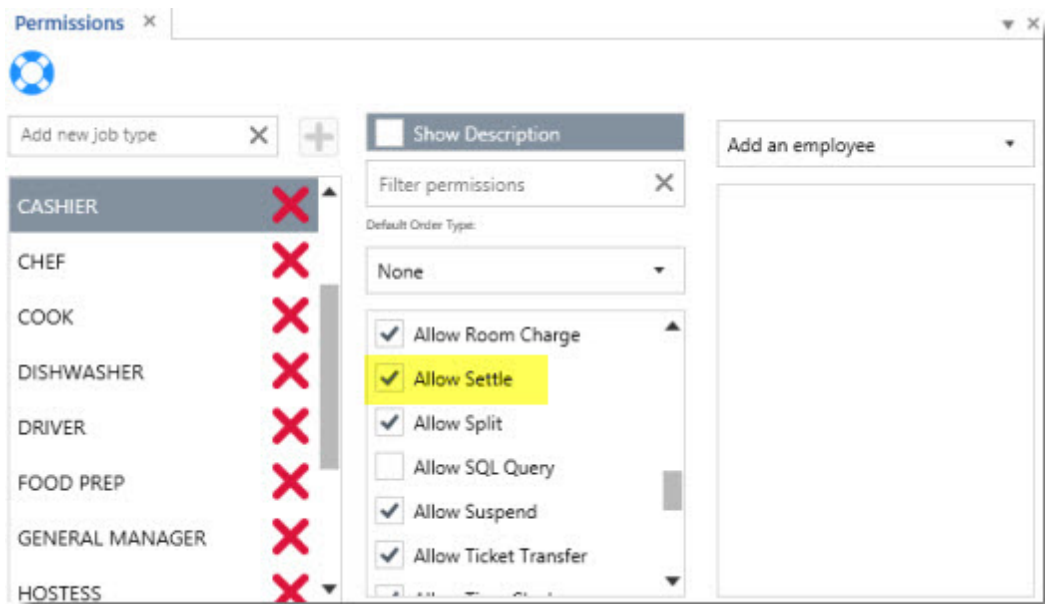
In addition, the following permissions must be enabled for each employee's job type:

- Allow Cash Drawer Open
- Allow Cash Sale
- Allow Settle

Permissions Required For Dual Cash Drawer Usage

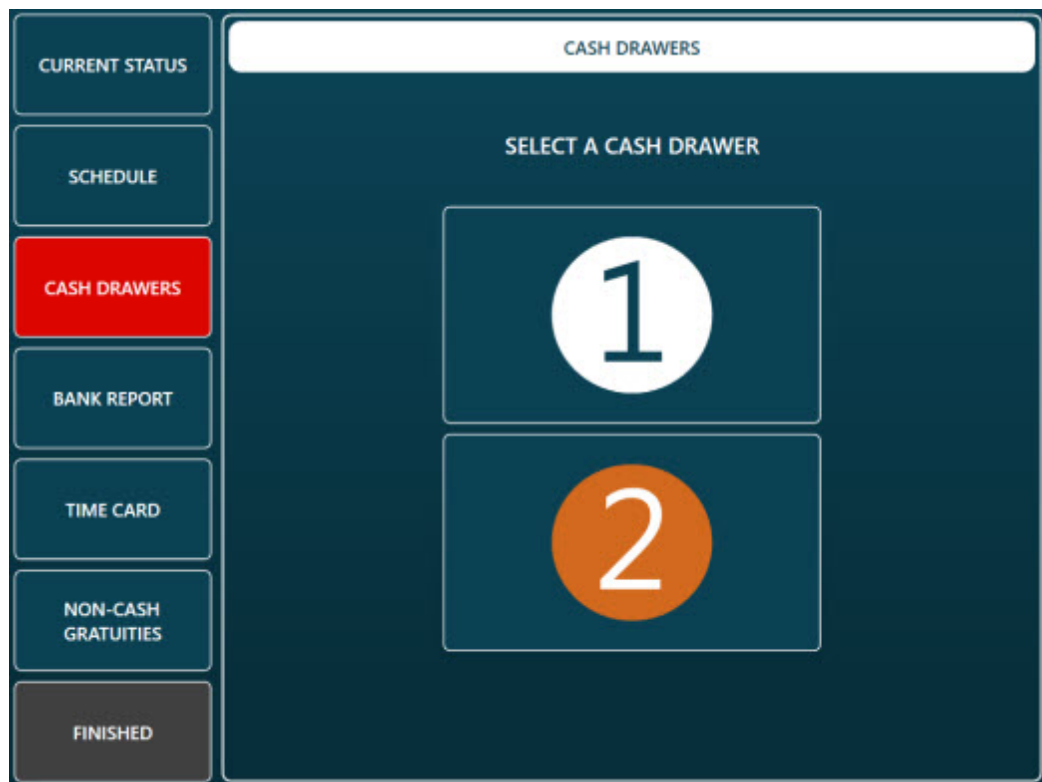
#### Permissions Required For Dual Cash Drawer Usage





Permissions Required For Dual Cash Drawer Usage

When users first clock in, they must select a drawer to clock in. This drawer is now their default drawer for the entire shift. If the drawer assignment must be changed mid-shift, the manager can change the drawer assignment on the Manager screen by pressing the **SYSTEM** button followed by the **CASH DRAWERS** button.



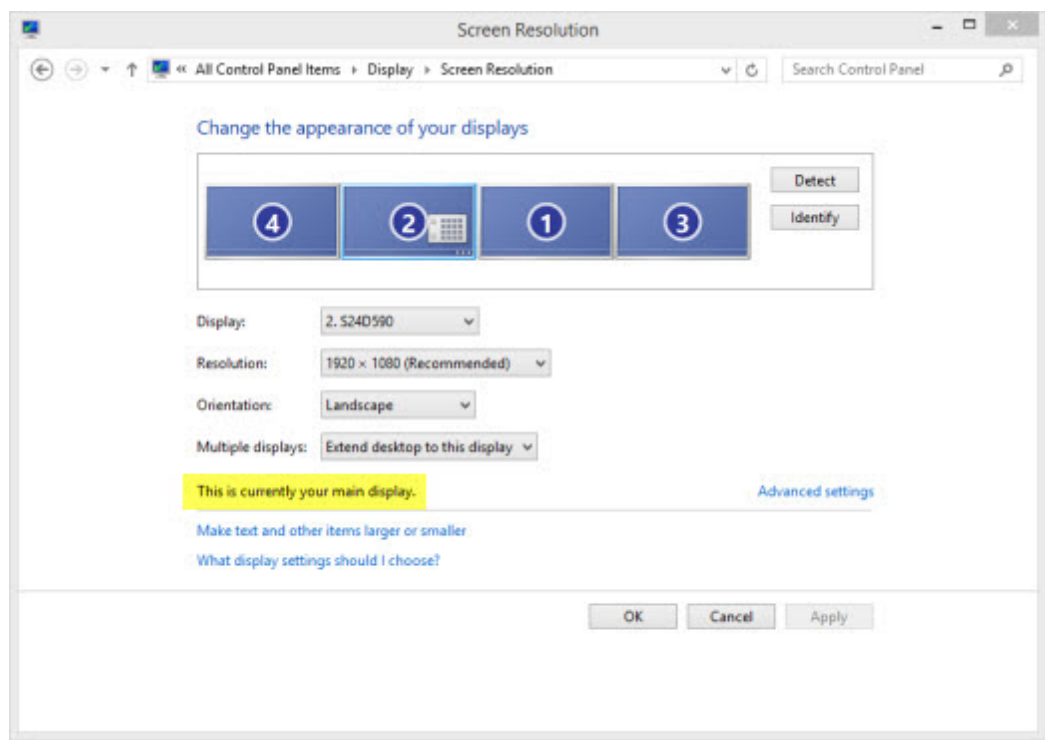
Time Clock Screen Cash Drawer Selection

## 6.5 LCD Display

AmigoPOS can output the order entry screen guest check to a customer facing LCD display.

### Display Setup

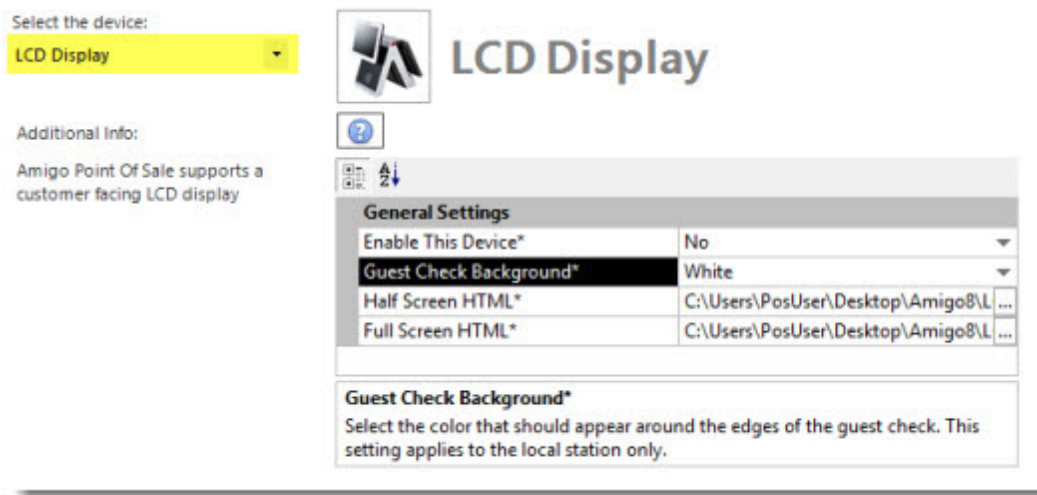
Open Windows Control Panel/Display and select Adjust resolution. In most cases 2 monitors are shown on the list, where the primary display is used for the pos touchscreen and the secondary display is set to the customer facing LCD. If more than 2 monitors are in use, verify that the first non-primary display is set to the customer facing LCD. For example, in the image below the main display is in position 2 and the first non-primary display is in position 3.



**Windows Control Panel/Display/Adjust Resolution**

### Back Office Settings

Enable the display and set the background color and html pages in **Back Office>Settings>Peripherals>LCD Display**.



The following settings are available to customize the LCD display. All settings apply to the local pos station only and must be set at each station individually.

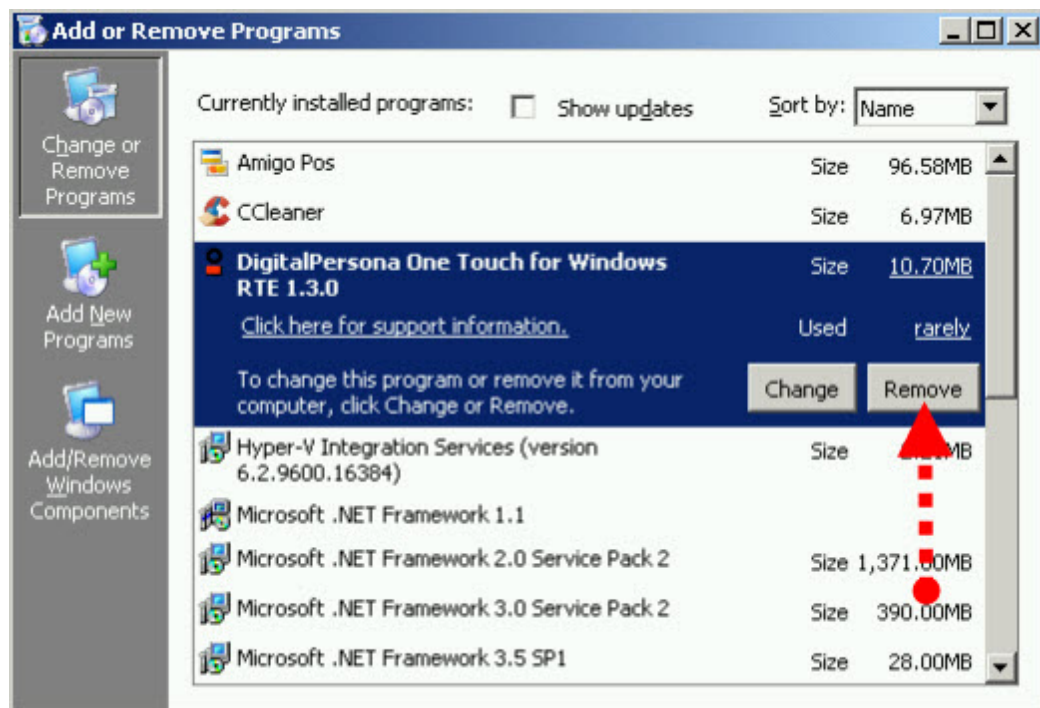
- **Guest Check Color Background:** Select the color that should appear around the edges of the guest check. The color is visible only for orders that are open on the order entry or settle screen.
- **Half Screen HTML:** Select the html file that should appear at the right of the guest check. The html file is used only for orders that are open on the order entry or settle screen.
- **Full Screen HTML:** Select the html file that should appear when the guest check is hidden.

## 6.6 Fingerprint Setup

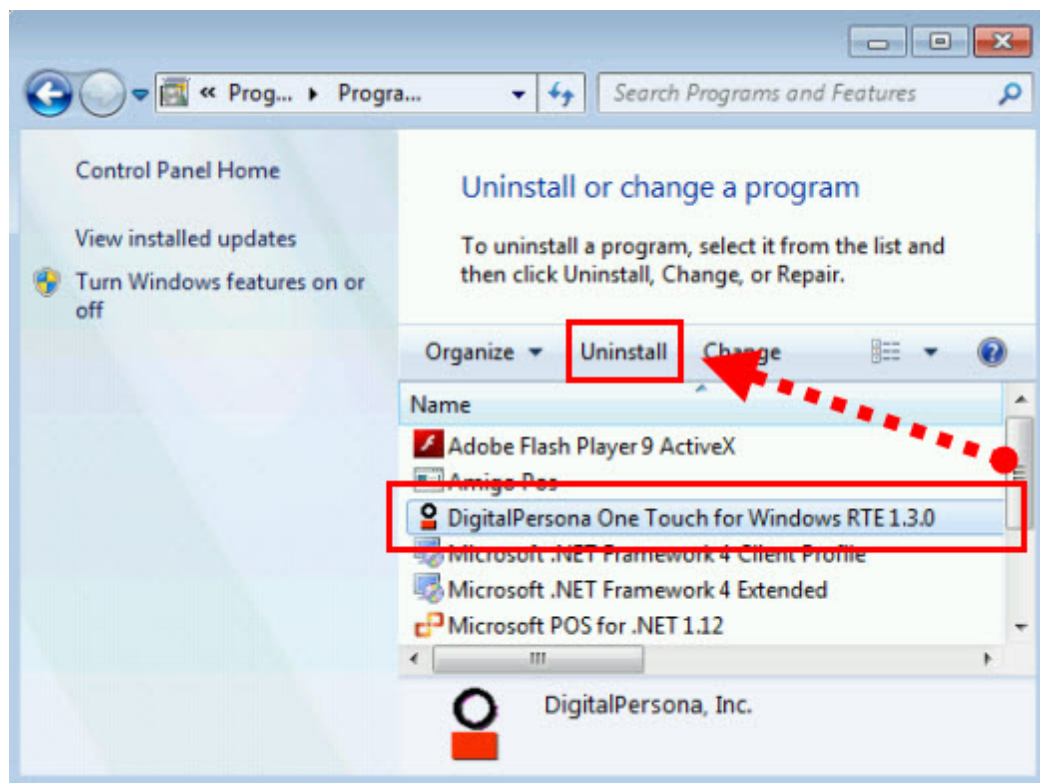
AmigoPOS supports the Digital Persona U.are.U fingerprint reader. Complete the following steps at each station to enable the fingerprint reader interface.

1. Current AmigoPOS 8.4 or earlier users should first uninstall the DigitalPersona One Touch for Windows RTE 1.3.0 drivers. In addition, employee fingerprints must be enrolled again in [Back Office > Employees > Manage Fingerprints](#) <sup>724</sup> because fingerprints scanned with earlier Digital Persona SDKs are not compatible with the current release.

- On computers running Windows 7/8/10, click **Windows Start > Control Panel > Programs and Features**. Select DigitalPersona One Touch for Windows RTE 1.3.0 and click Uninstall on the toolbar.



**Uninstall DigitalPersona One Touch for Windows RTE 1.3.0 on Windows XP**



**Uninstall DigitalPersona One Touch for Windows RTE 1.3.0 on Windows 7**

2. Download the Digital Persona U.are.U RTE drivers from the [driver download page](#) at amigopos.com. Save the zip file to the desktop and right-click on the file and select Extract All... to unzip. Double-click on setup.msi to install the

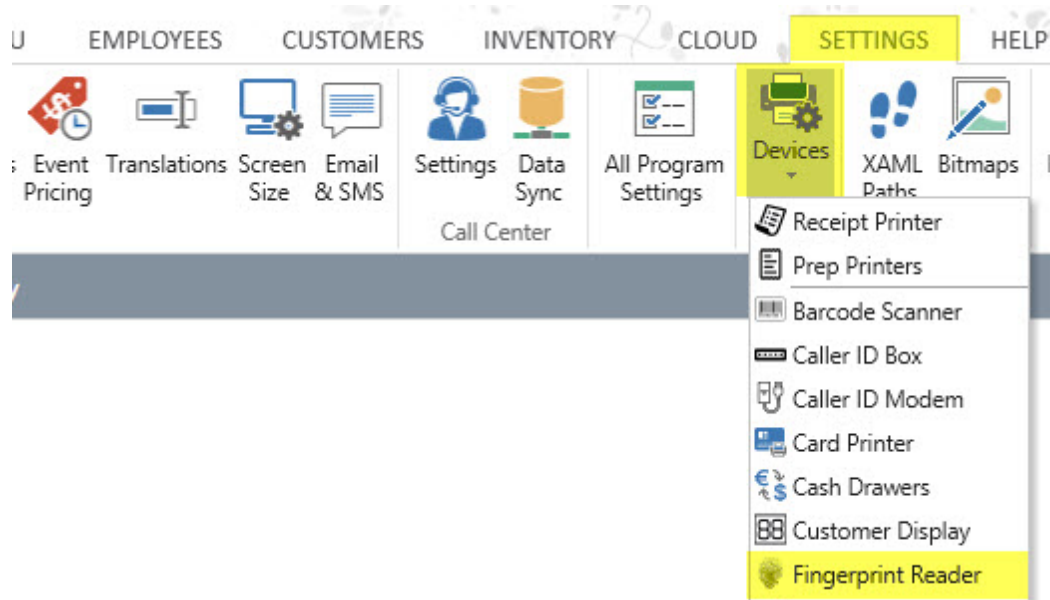
drivers. Restarting Windows is generally not required, even if prompted to do so. Note that the image below contains direct links to the files.

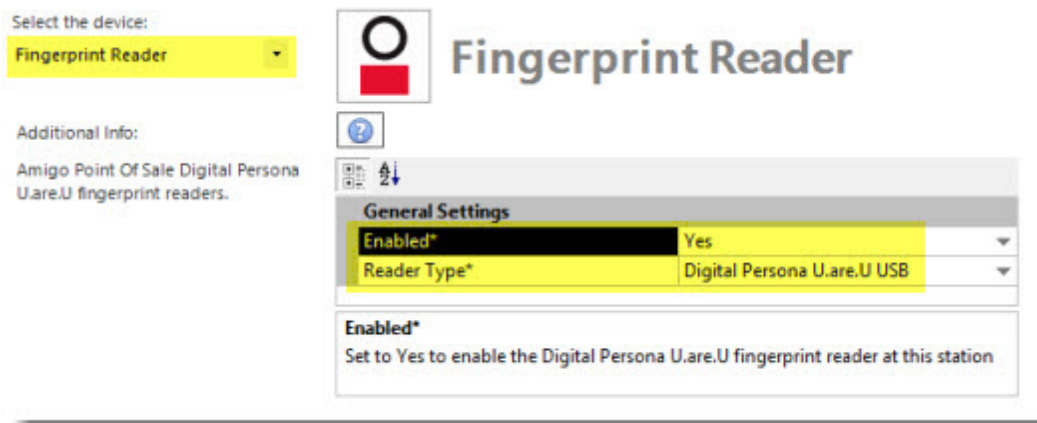
### DIGITAL PERSONA U.are.U FINGERPRINT READER

- [Amigo Pos 8 \(32-Bit\)](#): Installs the Digital Persona fingerprint reader drivers required by Amigo Pos 8.4 or later. 32-Bit drivers are for Windows XP and 32-bit Windows 7/8
- [Amigo Pos 8 \(64-Bit\)](#): Installs the Digital Persona fingerprint reader drivers required by Amigo Pos 8.4 or later. 64-Bit drivers are for 64-Bit Windows 7/8
- [Amigo Pos 7 \(32-Bit\)](#): Installs the Digital Persona fingerprint reader drivers that are automatically installed by Amigo Pos 7. 32-Bit drivers are for Windows XP and 32-bit Windows 7/8
- [Amigo Pos 7 \(64-Bit\)](#): Installs the Digital Persona fingerprint reader drivers that are automatically installed by Amigo Pos 7. 64-Bit drivers are for 64-Bit Windows 7/8

#### amigopos.com Driver Download Page

3. In **Back Office>Settings>Peripherals**, select **Fingerprint Reader** from the drop-down list and set the value for **Enabled** to **Yes**.





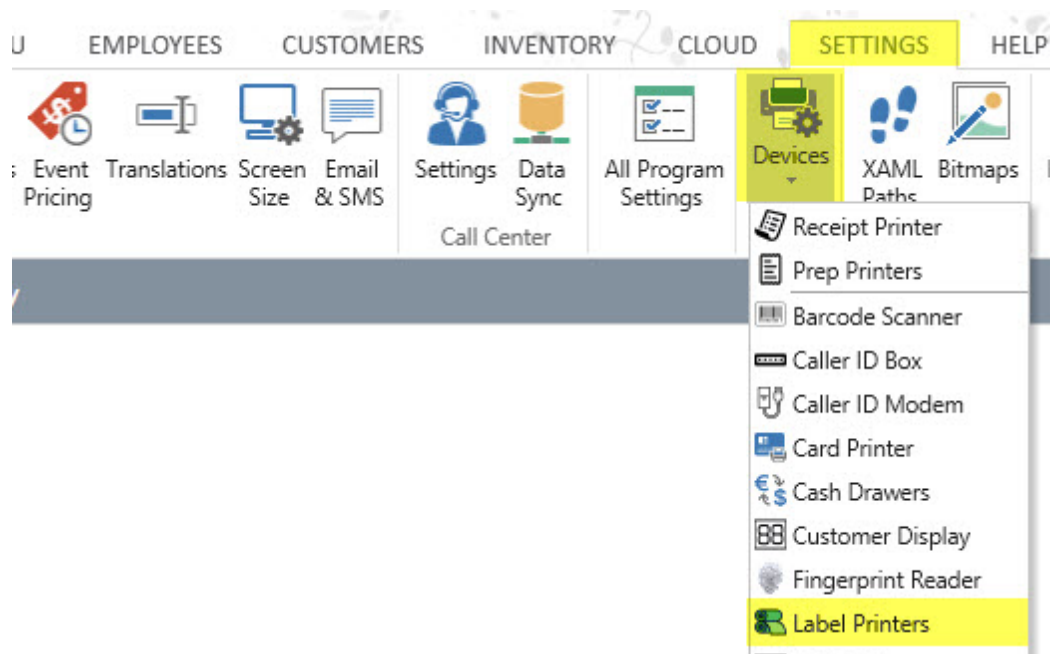
**Enable the Fingerprint Reader**

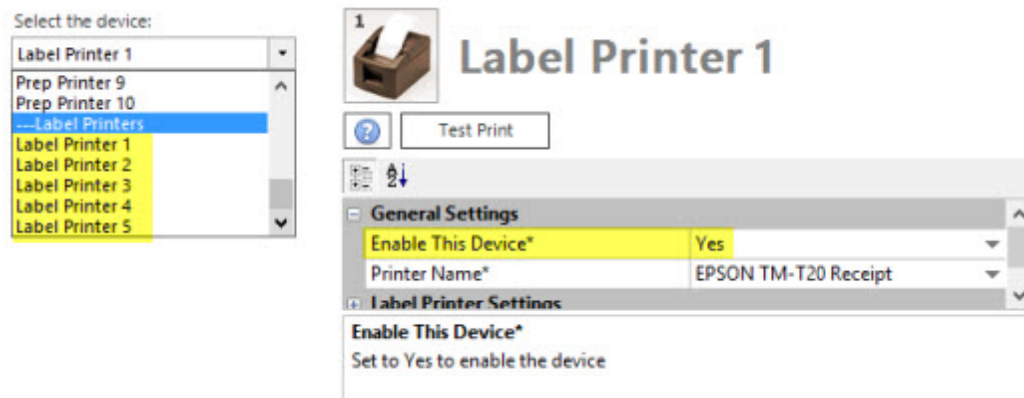
4. Refer to the [fingerprint login](#)<sup>[724]</sup> topic to enroll employees fingerprints.

## 6.7 Label Printers

AmigoPOS includes support for up to 5 label printers and supports most modern label printers that use MS Windows printer drivers. The printers should be installed using network print servers similar to the [prep printer setup](#)<sup>[159]</sup> description. Each printer can be configured in Back Office/Settings/Peripherals/.

- [Settings](#)<sup>[144]</sup>
- [Label Templates](#)<sup>[144]</sup>
- [Menu Items](#)<sup>[146]</sup>
- [Order Types](#)<sup>[146]</sup>
- [Printer Driver](#)<sup>[147]</sup>





### Settings


Select **Yes** next to **Enable this device** and enter the local printer name. Select the label printer from the **Printer Name** drop-down list and click the **Test Print** button to verify that AmigoPOS can communicate with the label printer. Note that this step must be completed at each pos station. The following settings are shared by all stations and can be set at any station or back office PC:

- **Label Printer Font:** Select a fixed width font for best results
- **Label Template:** Refer to the [templates](#) <sup>144</sup> section below
- **Label Printer Font Size:** Select a font size based on the label size and the information that will be printed on the label. For example, if the customer's address is included on each label, choose a smaller font size to ensure that more than one label is not required
- **Label Print Modifiers:** Check the box to print the modifiers under each menu item

### Label Templates



<PRINTER> Star TSP100 Cutter (TSP  
 <TYPE>#<ID> DELIVERY #2  
 <DATE><SPACE><TIME> 9/9/2014 1:49 PM  
 <ITEM> SMALL CH & PEP  
 - GREEN PEPPER  
 - HAM  
 - HAMBURGER  
 - MUSHROOMS  
 <NAME> 1 Wall Street Building  
 <PHONE> 111-2222  
 <ADDRESS> Wall Street  
 <COUNT> ITEMS 2 ITEMS  
 TOTAL <TOTAL> TOTAL \$34.88



#### Sample Label With All Tokens In Use

The label template is used to customize the information that is printed on each label. Tokens are used to specify the information to be printed and other information can be included in plain text, i.e. the business name, address, or phone number can be added to the template. The example shown above uses the template:

```

<PRINTER><CR><TYPE> #<ID><CR><DATE>
<TIME><CR><ITEM><CR><NAME><CR><PHONE><CR><ADDRESS><CR><CITY><CR><COUNT>
ITEMS<CR>TOTAL <TOTAL>
  
```

The following tokens are available:

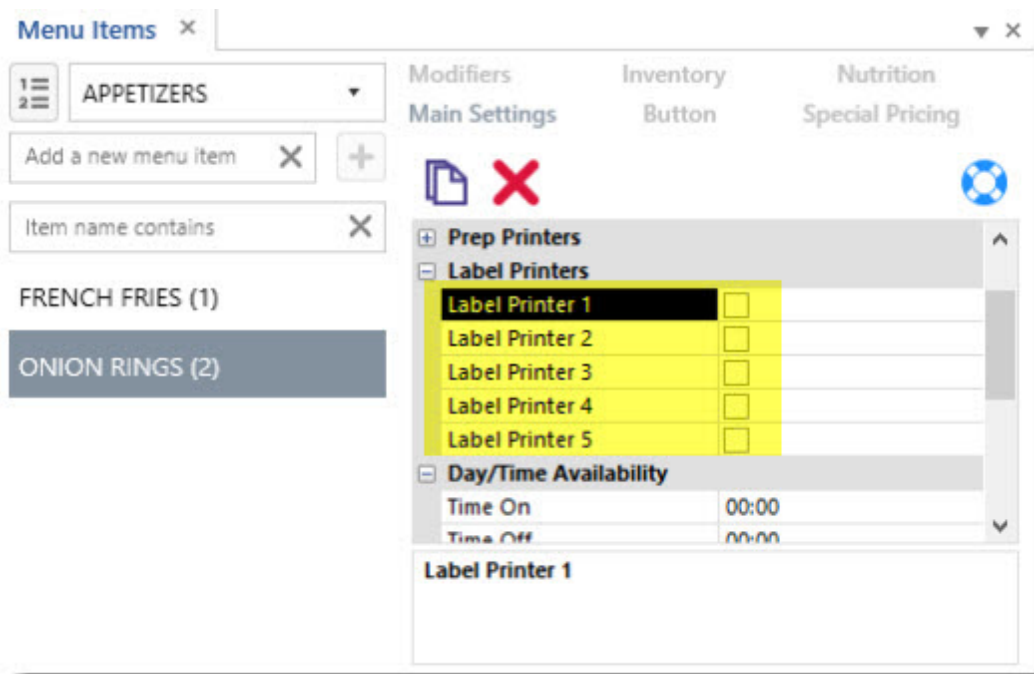
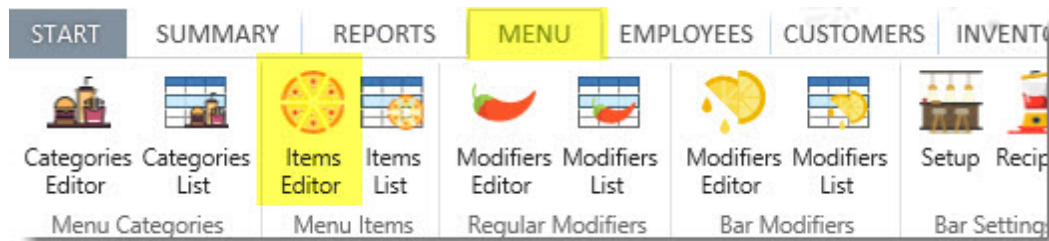
- <CR>: Line break (carriage return)
- <SPACE>: Empty space
- <ID>: Order Number
- <DATE>: Date that the label was printed
- <TIME>: Time that the label was printed
- <ITEM>: Menu Items
- <NAME>: Customer's full name
- <PHONE>: Customer's phone number (formatted as per back office settings)
- <ADDRESS>: Customer's street address
- <CITY>: Customer's city



- **<TYPE>**: Order type
- **<COUNT>**: Menu item count (entire order)
- **<TOTAL>**: Balance due
- **<PRINTER>**: Printer name

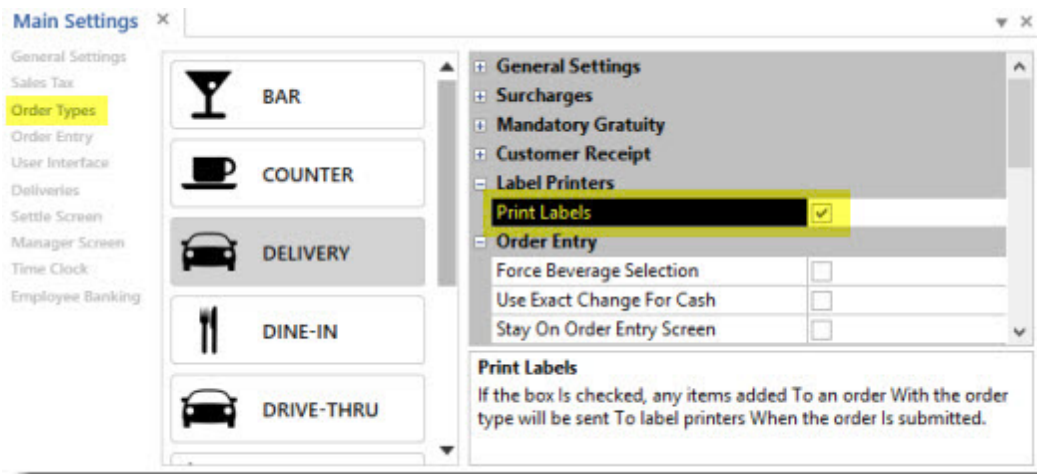
### Menu Items

Each regular menu and bar menu menu item can be sent to any or all label printers by checking the box next to the Label Printer (1-5) fields.



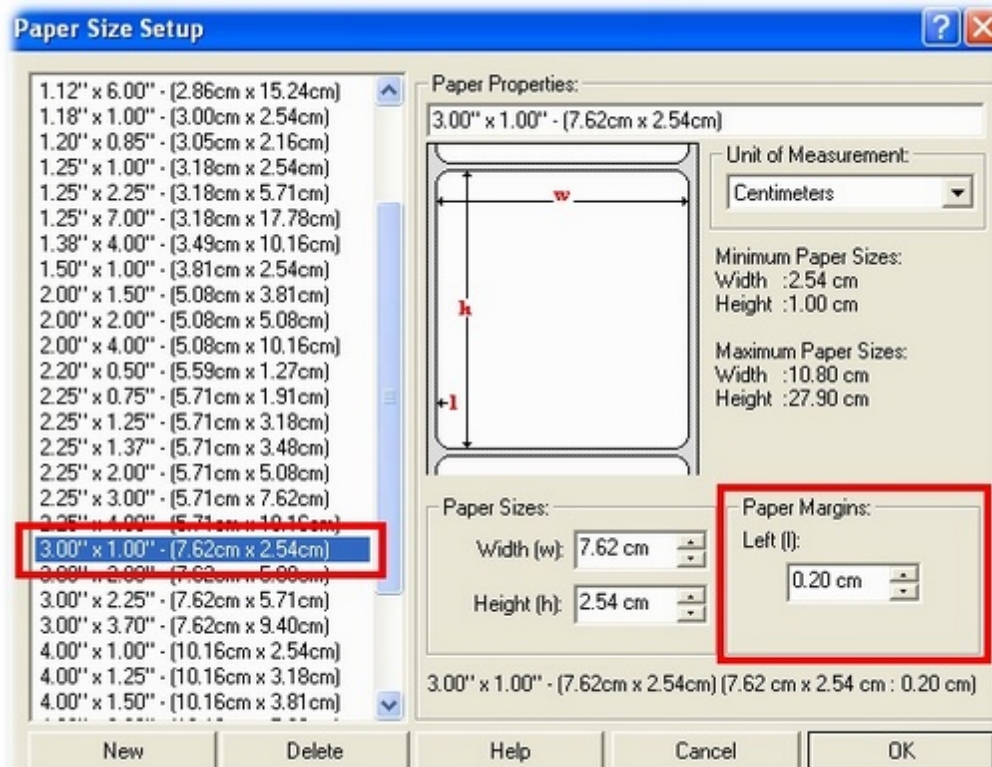
### Order Types

In **Back Office>Settings>Main Settings>Order Types**, select each order type that requires labels and check the box next to the **Print Labels** field.



### Printer Driver

After the printer is installed, open Windows Control Panel > Devices and Printers, right-click on the label printer and verify that the correct label size is selected. The driver for the Zebra label printer below also allows the left margin to be reduced.



Adjust the left margin

## 6.8 Maxim iButton

### Introduction

The iButton is a computer chip enclosed in a 16mm thick stainless steel can. An iButton uses its stainless steel 'can' as an electronic communications interface. Each iButton has a unique and unalterable address laser etched onto its chip inside the can. The address (e.g. 2700000095C33108) can be used as a key or identifier for each iButton. Since AmigoPOS only uses the iButton for identification and does not write to the iButton, the less expensive read-only iButton can be used, although any iButton is compatible.



### Maxim iButtons and iButton Key Ring Mounts

#### iButton Reader

One iButton reader, also called a receptor or probe, is required for each pos station. These inexpensive devices are available from various vendors in many styles and some vendors integrate the iButton reader into all-in-one pos stations. Additional information is available at the [Maxim product page](#). Since AmigoPOS only uses the iButton for identification (similar to fingerprint login), the iButton is not required to remain in the reader after login. Although the iButton reader is available with various interfaces, the USB interface is recommended for easy setup.



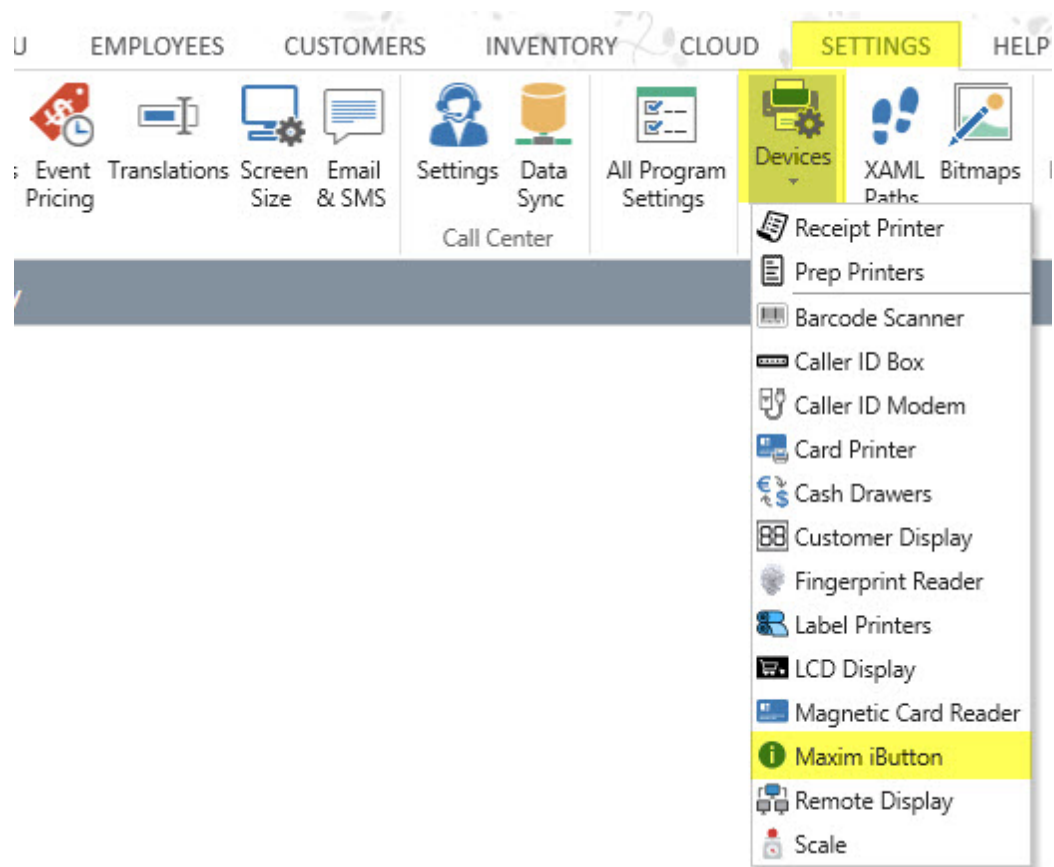
**Maxim iButton Touch-and-Hold Probe (shown with Cradle and USB Adapter)**

### **Driver Installation**

The iButton reader requires Maxim 1-Wire drivers to be installed on the PC so that the reader is recognized. Obtain the 1-Wire drivers from the [Maxim 1-Wire drivers download page](#) by selecting the operating system from the drop down list. The AmigoPOS iButton interface has been tested with both 32- and 64-bit 1-Wire drivers. Install the drivers before connecting the reader. After the drivers are installed, connect the reader to any available USB port to complete installation and restart AmigoPOS. Note that AmigoPOS should be restarted any time an iButton reader is connected to the pos station.

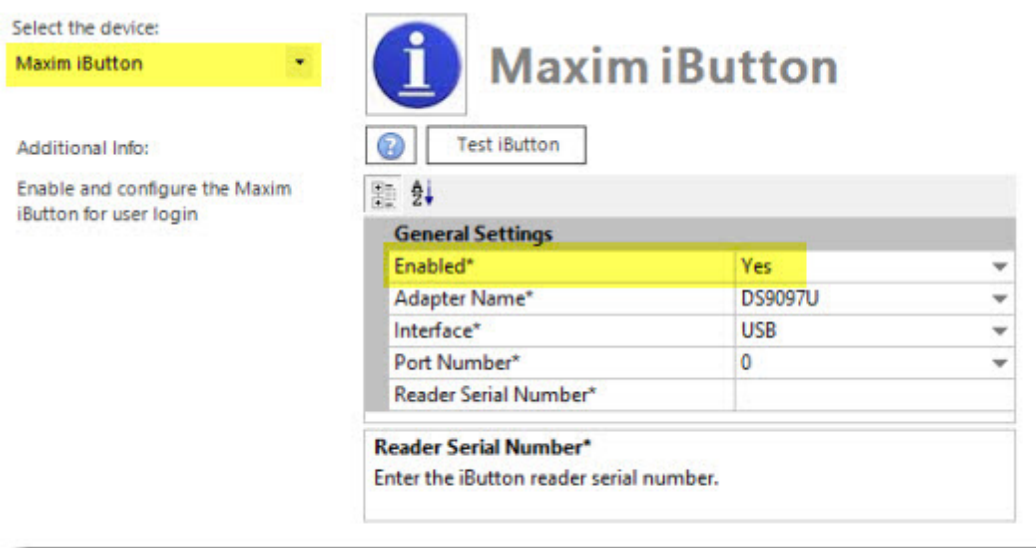
### **Back Office Setup**

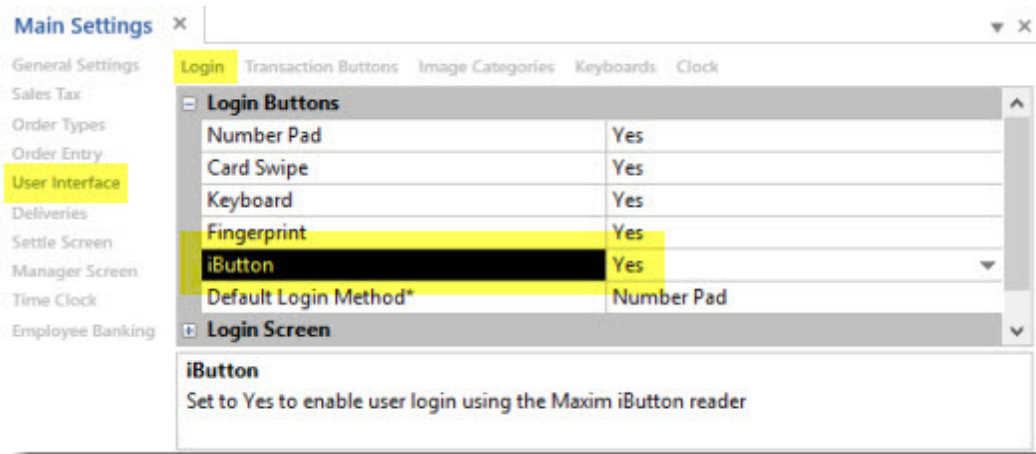
After the drivers are installed and the reader is connected to the pos station, open **Back Office>Settings>Peripherals** and select Maxim iButton from the drop-down list. Select the interface type and the port. The default port for most iButton readers is 1. Click the Test button and press an iButton against the reader to confirm that the device is recognized. If the test is unsuccessful, use trial and error to determine the correct port number. Repeat the setup procedure at any additional pos stations with an iButton reader.



### User Interface

After the iButton has been tested at each pos station, open **Back Office>Settings>Main Settings>User Interface** and verify that the **iButton** login method is enabled. AmigoPOS must be restarted after enabling this login method.

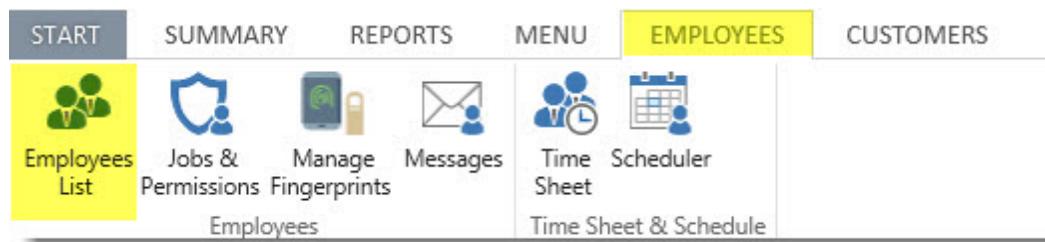


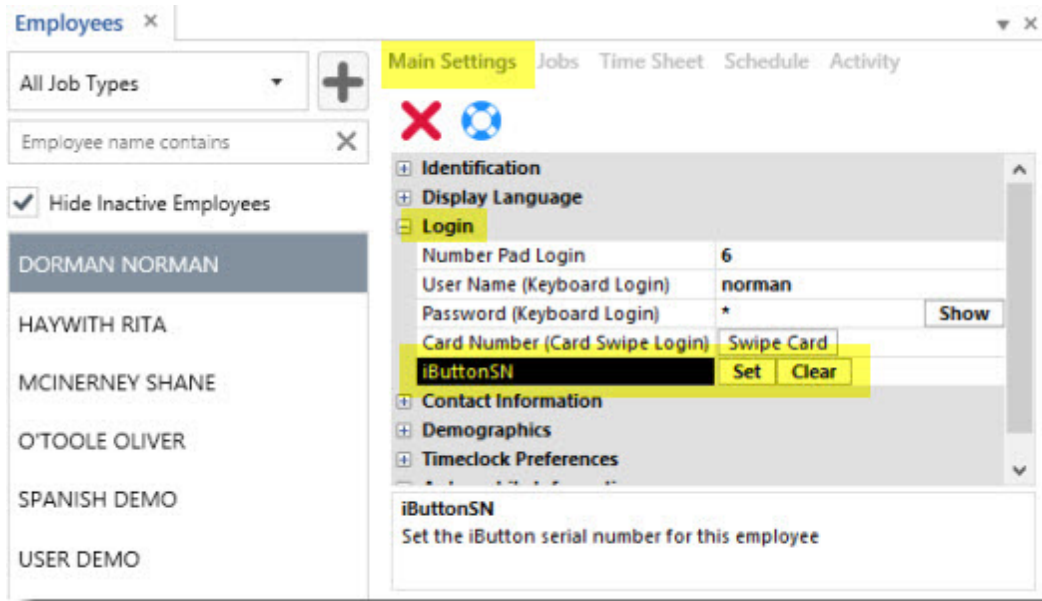


Main Settings/User Interface

### User Login

To assign an iButton to a user, open **Back Office>Employees>Employees List** and select the employee from the list. Highlight the **iButtonSN** field and press the Add New to show the iButton entry dialog. Press the iButton against the reader and press the Save button to assign the iButton's serial number to the selected employee. Click the **Update Pos Stations** at the top right so that the employee can begin using the iButton for logging in. The same iButton cannot be assigned to 2 users. If the iButton is to be reused, highlight the iButton SN field and click the Delete button for the previous user before assigning the button to the new user.





Employees List

## 6.9 Magnetic Card Reader

### 6.9.1 General Settings

AmigoPOS includes support for keyboard wedge (USB or PS2 interface) and USB HID credit card readers listed on the certified hardware page. Many card readers will work without additional setup. Drivers are not required for either card reader type, regardless of interface.

Keyboard wedge readers must be configured as shown below:

**Note for keyboard wedge interface scanner and magnetic card reader users:** AmigoPOS supports both keyboard wedge magnetic card readers and keyboard wedge scanners. The output from keyboard wedge devices appears as text typed from a keyboard to both Windows and AmigoPOS. Since AmigoPOS does not force the user to select a text box or open a popup window before scanning a barcode or swiping a credit card, AmigoPOS must be able to determine if the output is from a magnetic card reader or barcode scanner. The simplest method is to append a character to the end of the barcode scan and append a single carriage return to the end of the card swipe.

The following information requires that you obtain a copy of the magnetic card reader's user manual, generally downloadable from the manufacturer's web site in PDF format. You may also need to download a utility that will allow you to communicate with the magnetic card reader to change the settings as required.

- If using a **IdTech** or **Pos-X** magnetic card reader, refer to the [next topic](#) <sup>159</sup> for easy setup instructions.
- If using a **Magtek** (stand-alone or preinstalled on ELO touchscreens), the card reader should already work with AmigoPOS

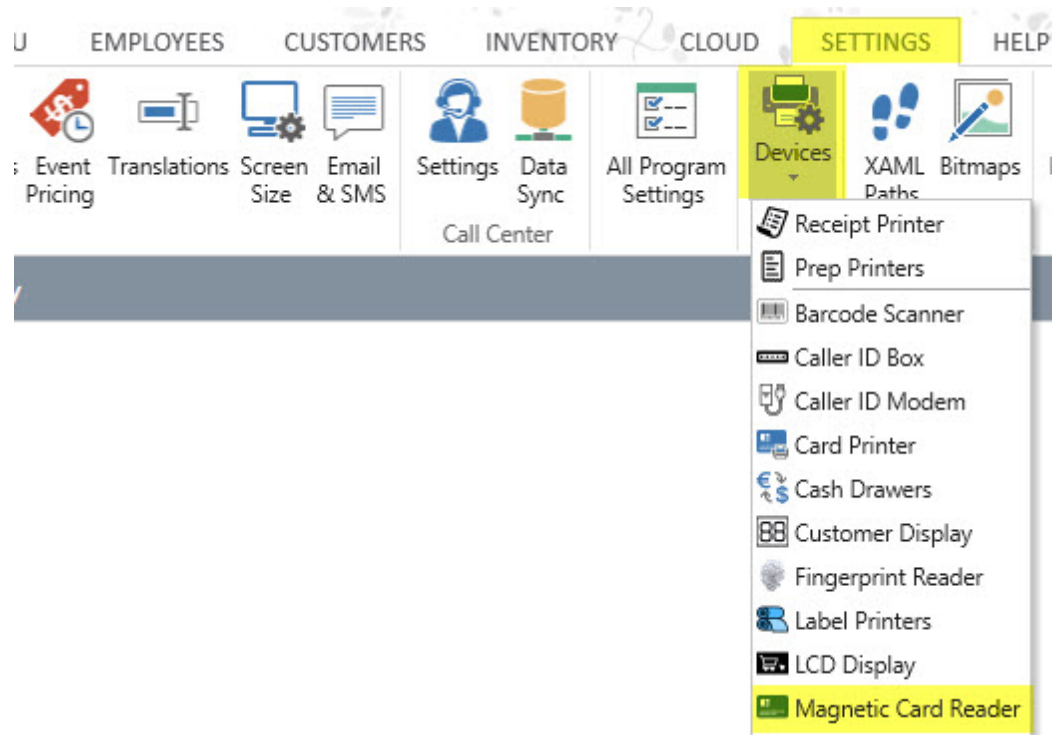
#### Configuring the Magnetic Card Reader

In order to ensure proper formatting of the swipe for card readers with **keyboard emulation**, the following rules must be observed:

- The reader must **not** send a carriage return after each Track as shown in Example 2; the entire swipe must appear on a single line as shown in Example 1

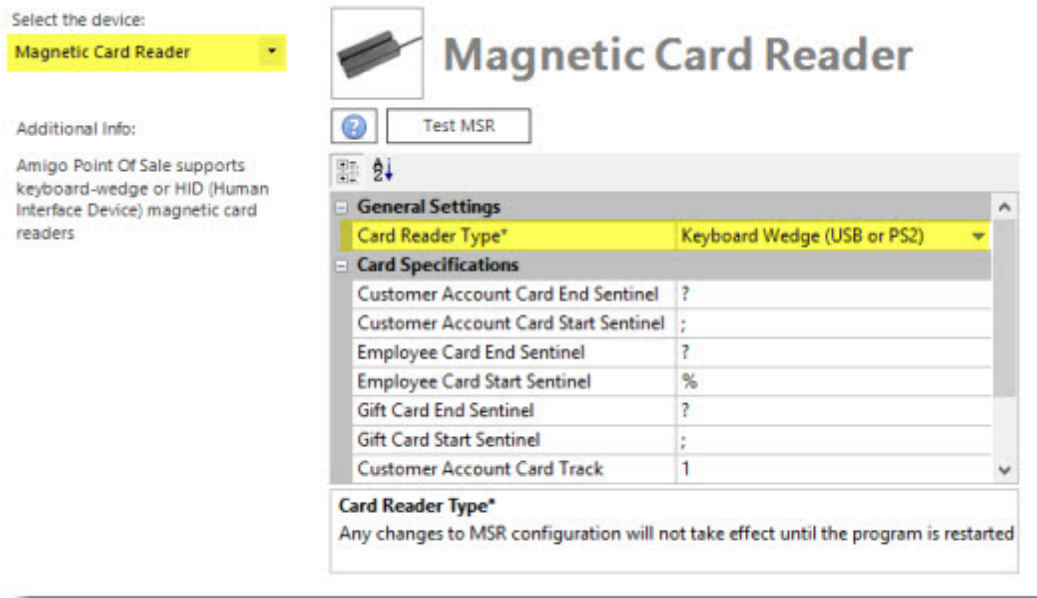


- The reader must send a carriage return after each swipe is complete. This can be observed in notepad when the cursor jumps to the next (blank) line when the swipe is complete.
- Be sure that the proper delimiters are used, i.e. ^, ?, %. These are generally correct on the vast majority of card readers and do not require modification.



The most common type of reader interface is a USB with keyboard wedge emulation. Select the card reader type as shown below at each pos station. Note that a keyboard wedge reader is different than an OPOS reader and OPOS is rarely used but may be required for some legacy devices.





### Keyboard Wedge Reader Configuration

Open Windows notepad on your pos station and ensure that word wrap is not enabled (on the top menu, select format and uncheck Word Wrap). Note that the swipe must appear entirely on a single line, as shown in Example A.

**Right!**

```
%B9991112223334445^PUBLIC/JOHN Q^1112223334445557778881112223331?
;3444555777888999=88999000111222333444?
```

**Example 1: A properly formatted swipe**

Example 2 shows an incorrectly formatted swipe, where a carriage return is sent after each track. This will cause a swipe error in AmigoPOS.

**Wrong!**

```
%B8768010000381411^PUBLIC/JOHN Q
^080710100651000000000381000000?
;8768010000381411=08071010381000065100?
```

**Example 2: An improperly formatted swipe**

A popular magnetic card reader is the Magtek MiniMag wedge reader. If you do not already have the user manual, download it [here](#) and refer to the section entitled "Track Separator Selection" on page 9. The MiniMag automatically sends a carriage return "<ENTER>" after each track. This must be disabled as described in the manual. After the track separator is disabled, the magnetic card reader is ready for use with AmigoPOS.

Most magnetic card readers are either correctly configured for use with AmigoPOS from the factory or require slight adjustments. Since each magnetic card reader is different, you must consult your user manual for instructions; we are very limited in the support we can offer for hardware configuration.

### Magnetic Stripe Encoding

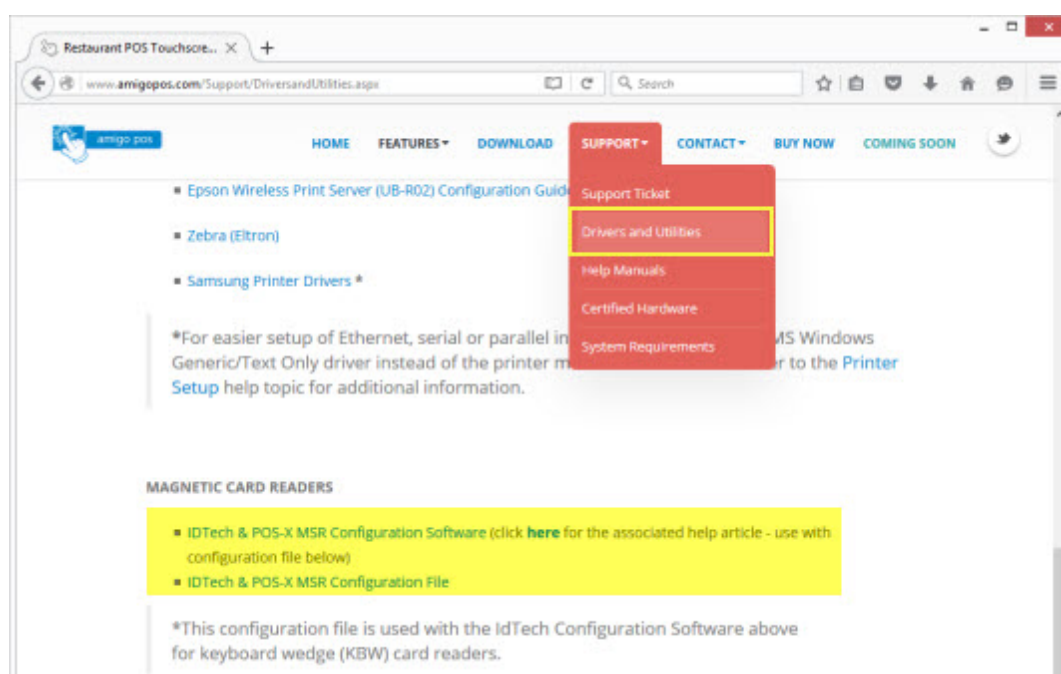
Gift, Loyalty and Employee Id cards must be properly encoded on 2 tracks to work with AmigoPOS. Refer to the [Sample Gift Card Configuration](#) help topic for card encoding instructions.

## 6.9.2 KBW Example: POS-X or IdTech

POS-X and IdTech magnetic card readers are easy to configure using the IdTech configuration utility and configuration file available at [amigopos.com](http://amigopos.com). Complete the steps below to configure the card reader to work in keyboard wedge mode with AmigoPOS. The procedure is identical for both the POS-X and IdTech USB MSR (including the integrated Xm130). This procedure has been tested on Windows 7/8/10.

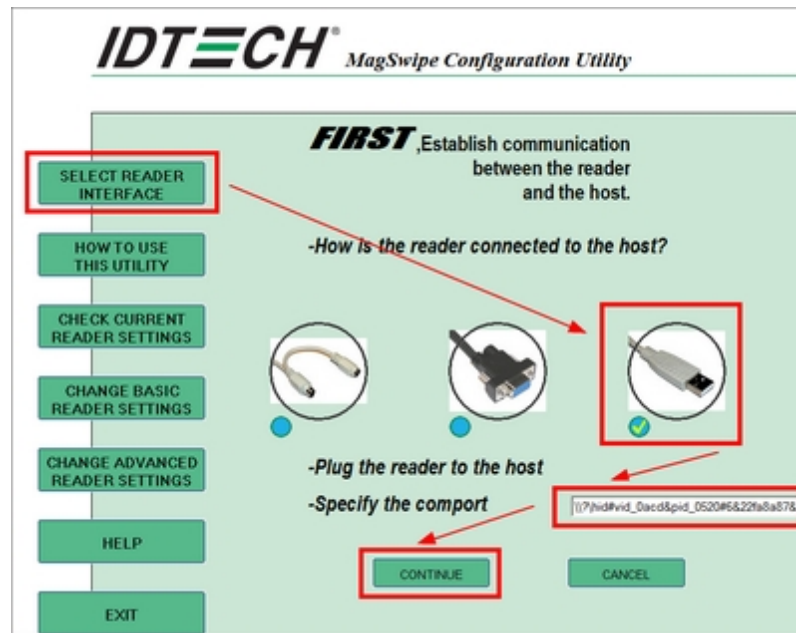
Note that this step is required only when using employee login, or integrated loyalty and/or gift cards.

1. Download the configuration utility (IdTechMagswipeConfigurationSoftwarev2.0.15) and configuration file (IdTechMinimagPOSXm95uKBW.cfs2) from [amigopos.com](http://amigopos.com), saving both files to the desktop or other easily accessible folder.



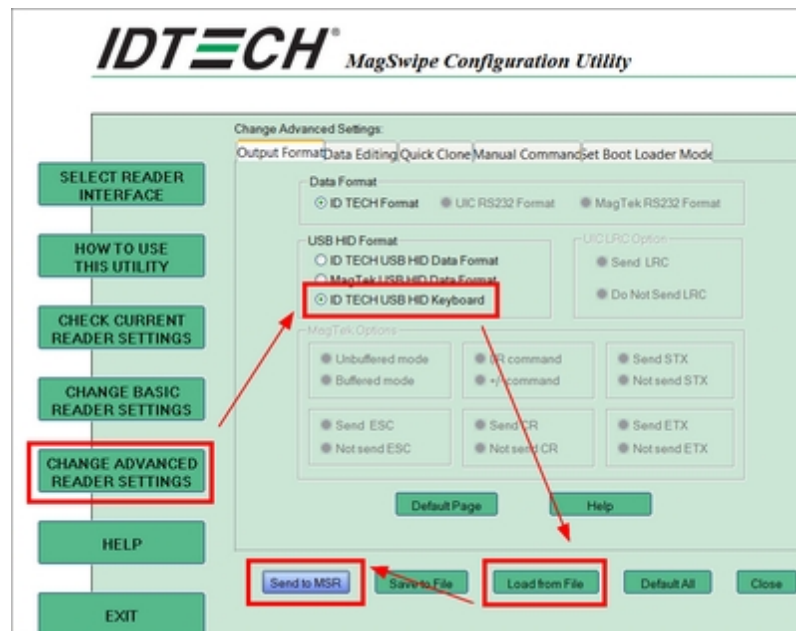
amigopos.com driver downloads page

2. Run the file named **IdTechMagswipeConfigurationSoftwarev2.0.15.exe** and click the **Install** button to extract the installation files to the desktop. Open the folder named **Magswipe Configuration Software V2.0.15\_Install Package** and run the file named **Setup.exe** to install the configuration utility (click Next as each prompt to accept the defaults for a Typical Installation). After installation is complete click the **Finish** button and reboot the PC if prompted.
3. Connect the magnetic card reader to a USB port
4. Click **Start > All Programs > MagSwipe Configuration Utility** and click on the Shortcut named **MagSwipe Configuration Utility**.
5. Click the **Select Reader Interface** button on the left, select the USB interface and select the newly installed MSR from the drop-down list next to *Specify the comport*. Click **Continue**, as shown below.



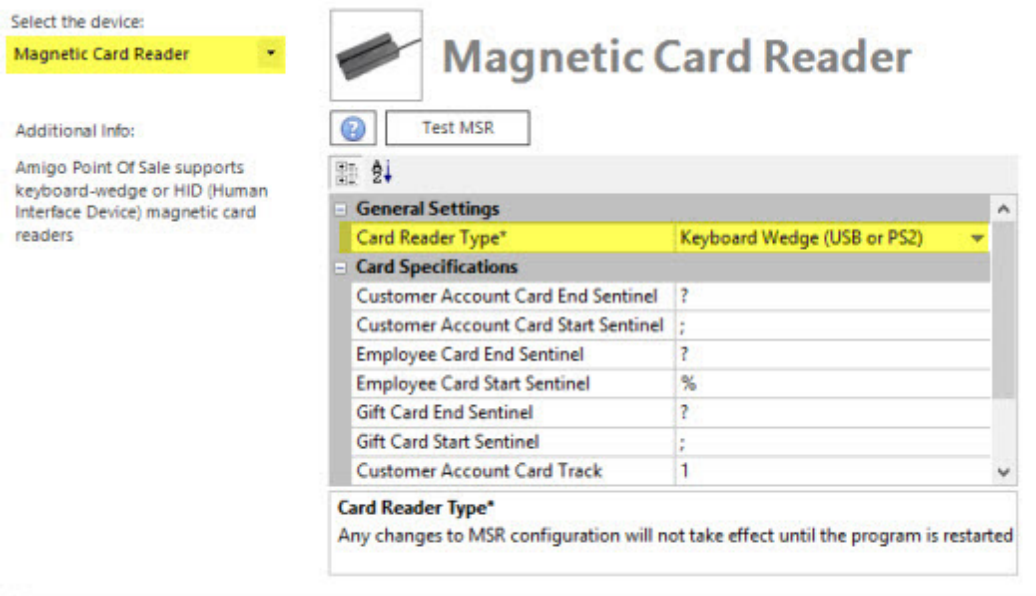
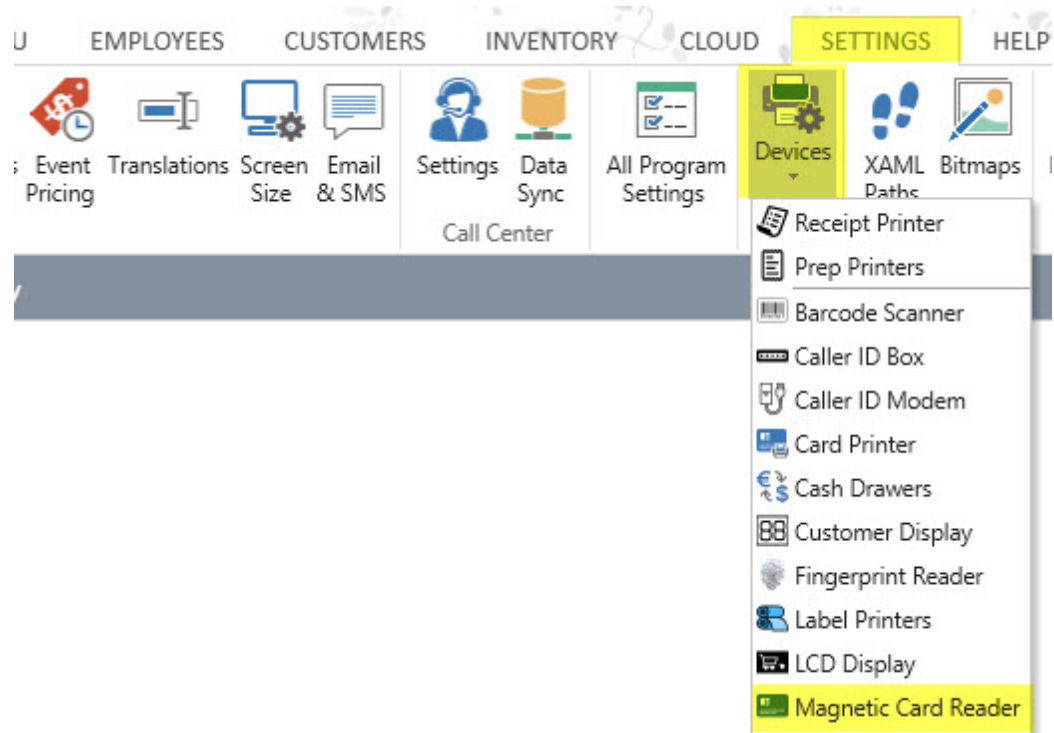
MagSwipe Configuration Utility Startup Screen

6. Click the **Change Advanced Reader Settings** button on the left. Select **IDTech USB HID Keyboard** in the USB HID Format box. Click the **Load From File** button at the bottom. Navigate to the desktop and select the previously downloaded file named `IdTechMinimagPOSXm95uKBW.cfs2`. Click Open. Click the **Send to MSR** button. Windows may display a small notification in the taskbar indicating that drivers are being installed. Allow a few seconds for the process to complete and click the **Exit** button on the left.



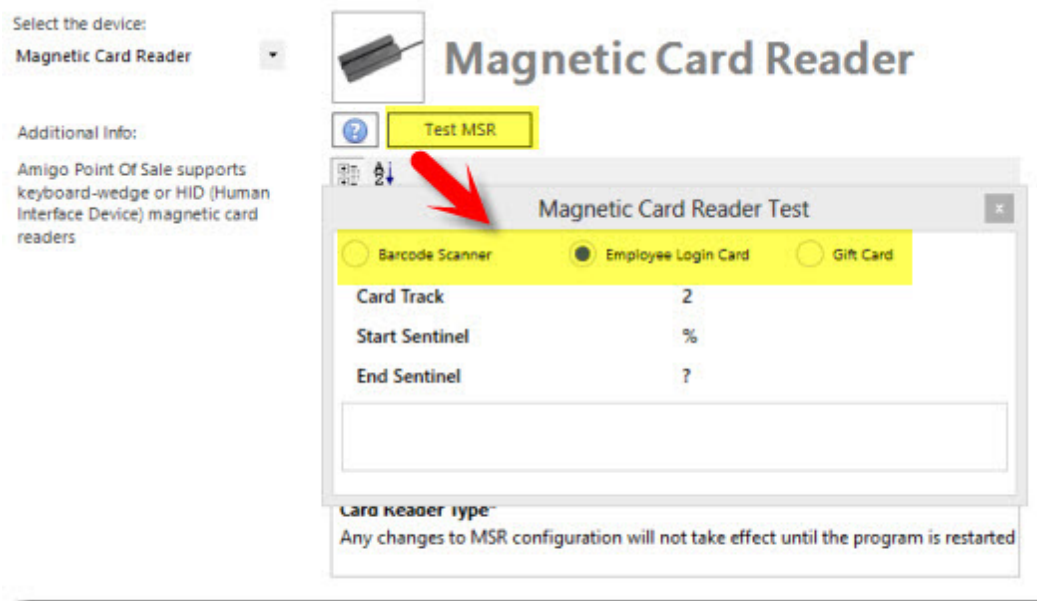
MagSwipe Configuration Utility Advanced Settings

7. Start Back Office and navigate to Back Office/Settings/Peripherals/Magnetic Card Reader. Select **Keyboard Wedge** next to Card Reader Type.



### Keyboard Wedge Reader Configuration

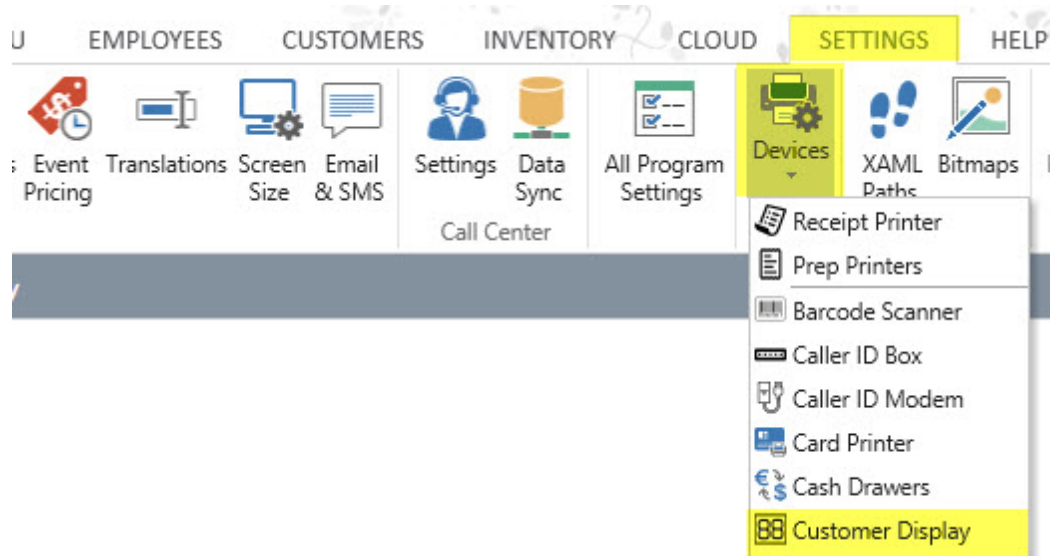
- Click the **Test MSR** button. Select Credit Card from the drop-down list and swipe a card to ensure proper operation.



Back Office Magnetic Card Reader Test

## 6.10 Pole Display (Dot Matrix)

AmigoPOS supports customer displays that are capable of using the Logic Controls LD9000, Ultimate mode or Epson command set. The display must be connected via a local serial port. In addition, some display manufacturers including Logic Controls offer USB displays with a virtual serial port device driver.

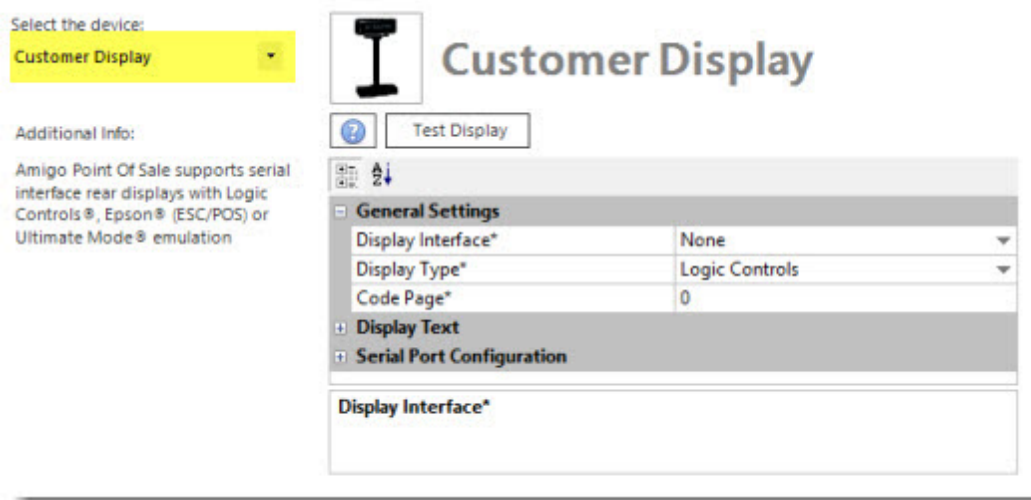


Customer Display Configuration

Open Back Office/Settings/Peripherals/and select Customer Display from the drop-down list. Select the emulation mode next to **Device Type**. Serial port settings should be copied from the serial port's settings window in the MS Windows Device Manager (default settings are **9600** Baud, **8** Data Bits, **No** Parity, **1** Stop Bit).

The display can display up to 20 characters on each line. Enter the first line next to Top Line Text and the second line next to Bottom Line Text. Click the **Test Display** button to ensure proper operation and repeat on any additional pos stations.

Note: Some displays, such as the Logic Controls LD9000 are capable of auto-scrolling the top line text. AmigoPOS will automatically scroll the first line text if the display offers scrolling.



Customer Display Configuration

## 6.11 Prep Printers

### 6.11.1 Overview

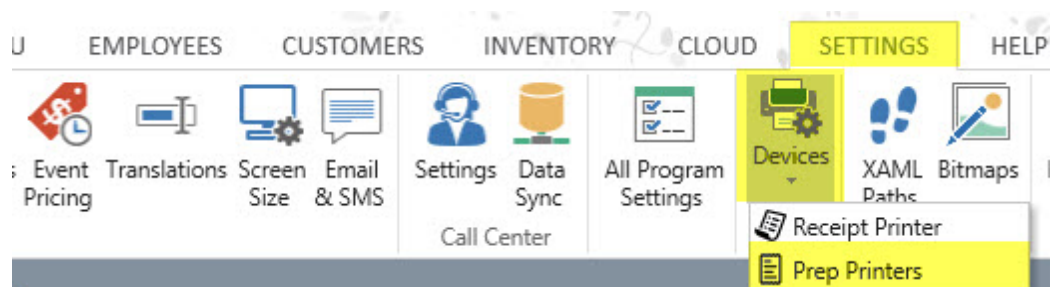
AmigoPOS includes the ability to print each menu item to up to 10 remote printers. Remote printers are generally used in kitchen or preparation areas where a concise order summary is ideal for efficient order preparation. Epson (ESC/POS) and Star compatible thermal and dot-matrix remote printers are supported, including the POS-X Xr200, Epson TM-U200 and Star SP500. AmigoPOS does not support older receipt printers that are not Epson ESC/POS or Star compatible.

Remote printers should be connected to the network using a print server to simplify sharing the printer among multiple pos stations. The printer can also be connected directly to a pos station and shared using MS Windows File & Printer Sharing, but the TCP/IP printer server is preferred. Many remote printers are available with an internal ethernet print server to simplify installation and eliminate the need for an extra power supply.

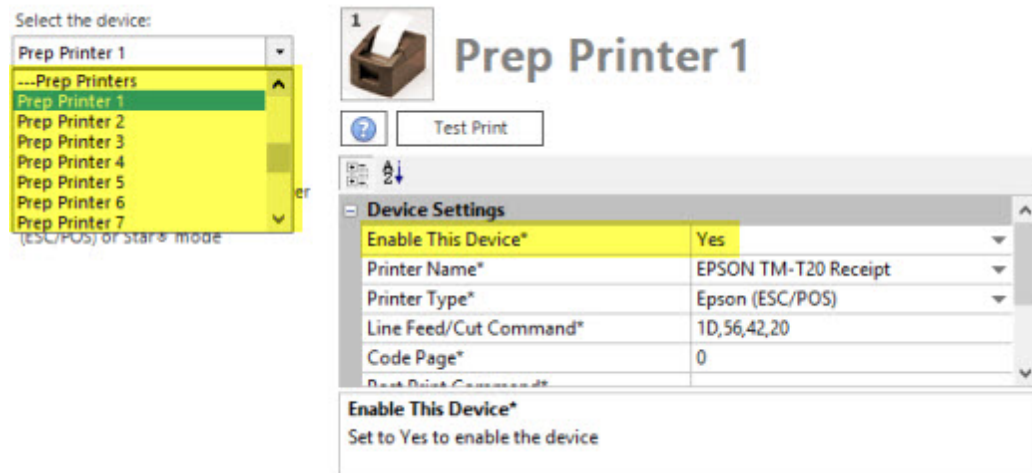
Begin by installing the print server software and configuring the print server's IP address. Next, connect the print server to the printer and install the printer on each pos station using the **Add Printer** function in the Printers and Faxes folder, as described in the [receipt printer installation](#) <sup>[18]</sup> topic, using the print server's IP address to create a new TCP/IP port. Select the generic/text only driver and print a test page to confirm successful installation.

The ability to use the manufacturer's Windows driver is included in AmigoPOS 8 for users that require character sets not available with Epson or Star emulation. The use of Windows drivers is not recommended for most installations because printing will be slower and prep ticket reprint is not possible. Whenever possible **use the standard Windows Generic/Text Only driver** as described in the [receipt printer installation](#) <sup>[18]</sup> topic.

**Note:** For maximum reliability, use a static IP address for a network (ethernet or wireless) print server. If using dynamic (DHCP) IP addressing for print server, in the event that the power is cycled on the router, IP addresses may be changed and require that the port settings in the printer setup dialog are updated with the new IP addresses. Consult the print server documentation for specific instructions on setting up a static IP address.



The remote prep ticket can be fully customized in Back Office/Settings/Peripherals/. Most general settings are shared between all remote printers, but settings marked with an asterisk must be set on each pos station for each printer. Local settings include the printer name and printer type.



The following settings are available to customize the remote prep ticket. These settings can be configured once any pos station for any remote printer and will be applied to all remote printers.

### Print Settings

- **Print Qty Start:** Enter the character to use before the numeric quantity on the prep ticket
- **Print Qty End:** Enter the character to use after the numeric quantity on the prep ticket
- **Print Line Feeds Bottom:** Number of blank lines to print at the bottom of prep tickets
- **Print Line Feeds Top:** Number of blank lines to print at the top of prep tickets
- **Delete Prep Ticket Alerts:** Set to Yes to delete prep ticket alerts so that they are not printed again if the order is recalled and new items are added.
- **Print Bar Tab Name:** Print bar tab name on prep tickets for reorders on the same bar tab
- **Print Customer Info:** Print customer name, address and phone on prep tickets
- **Print Date Time:** Set to Yes to print the date and time at the bottom of the prep ticket
- **Print Header Double-Height:** Print prep ticket header text in double-height font
- **Print Header Double-Width:** Print prep ticket header text in double-wide font
- **Print Menu Item Line Feed:** Set to Yes to insert a blank line after each menu item and optional is printed



- **Print Order Type:** Set to Yes to print the order type on the prep ticket header
- **Print Printer Name:** Set to Yes to print the printer name on the prep ticket header
- **Print Remove Asterisks:** Set to Yes to remove asterisks from menu item or modifier name on prep ticket
- **Print Server Name:** Set to Yes to print the server name on the prep ticket header
- **Print Table Name:** Set to Yes to print the table name on the prep ticket header
- **Print Guest:** Set to Yes to print guest number above menu items for order types that have guest assignment enabled

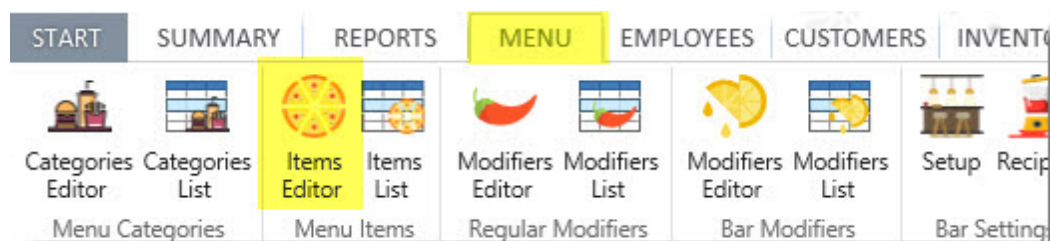
### Menu Items

- **Print Menu Items Double-Height:** Print prep ticket menu items in double-height font
- **Print Menu Items Red:** Print prep ticket menu items in red
- **Print Menu Items Double-Width:** Print prep ticket menu items in double-wide font

### Modifiers

- **Print Modifier Level Asterisk:** Set to Yes to print an asterisk before and after the optional level description when sent to prep printer
- **Print Modifiers Double-Height:** Print prep order modifiers in double-height font
- **Print Modifiers Red:** Print prep order modifiers in red
- **Print Modifiers Double-Width:** Print prep order modifiers in double-wide font

Each regular menu, bar menu and modifier will print custom text to remote printers. Enter the text to print remotely in the **Prep Text** field.





**Menu Items** x

APPETIZERS

Add a new menu item x +

Item name contains x

FRENCH FRIES (1)

ONION RINGS (2)

**Main Settings** Button Special Pricing Modifiers Inventory Nutrition

**General Settings**

Item Name	FRENCH FRIES
Menu Category	APPETIZERS
Add to Retail Favorites	<input type="checkbox"/>
Prep Text	FRIES
Visibility	Visible
Button Position	1
Availability	In-Store & Web
Modifier Groups Visible Rows	3

**Online Ordering**

**Pricing**

**Prep Text**  
Enter the text to print on the prep ticket and remote display. Limit the length to 20 characters.

### Prep Text Field

For each regular and bar menu item, check the box next to the Prep Printer1-10 fields to specify which prep printer(s) should print a prep ticket when time this item is ordered.

**Menu Items** x

APPETIZERS

Add a new menu item x +

Item name contains x

FRENCH FRIES (1)

ONION RINGS (2)

**Main Settings** Button Special Pricing Modifiers Inventory Nutrition

**General Settings**

**Online Ordering**

**Pricing**

**Prep Printers**

Prep Printer 1	<input checked="" type="checkbox"/>
Prep Printer 2	<input checked="" type="checkbox"/>
Prep Printer 3	<input type="checkbox"/>
Prep Printer 4	<input type="checkbox"/>
Prep Printer 5	<input type="checkbox"/>
Prep Printer 6	<input type="checkbox"/>
Prep Printer 7	<input type="checkbox"/>
Prep Printer 8	<input type="checkbox"/>
Prep Printer 9	<input type="checkbox"/>
Prep Printer 10	<input type="checkbox"/>

**Prep Printer 1**

### Setting the Prep Text for Regular Menu Items

## 6.11.2 Prep Ticket Format

### Overview

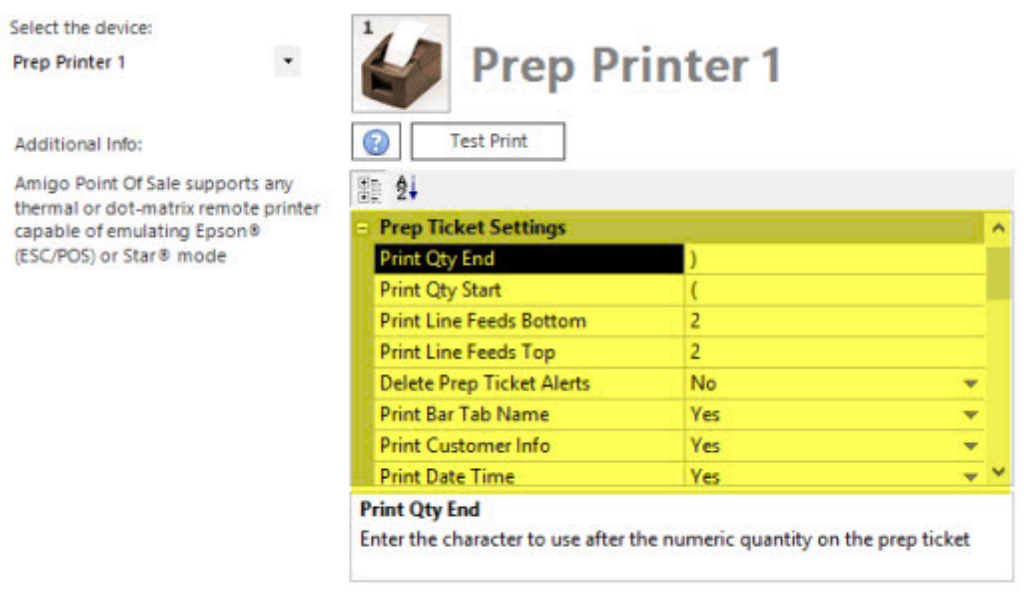
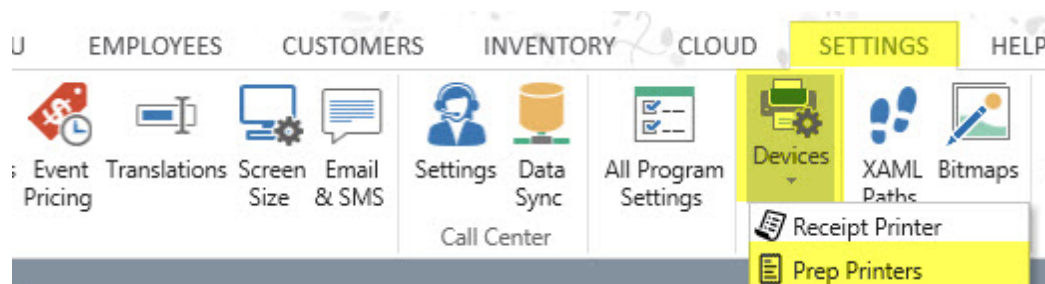
Several settings are available to customize the prep ticket. Note that not all printers are capable of every setting shown below and the prep tickets may appear different than the examples shown below. Do not enable unsupported commands, i.e. do not enable Print Menu Items Red if the printer is not capable of printing 2 colors or printing errors may result. Printing variations exist between printers from different manufacturers and the appearance of prep tickets may vary.

Review the following topics to customize prep tickets:

- [Shared Settings](#) <sup>163</sup>
- [Order-Type Specific Settings](#) <sup>165</sup>
- [Dine-In Order Example](#) <sup>165</sup>
- [Counter Order Example](#) <sup>167</sup>
- [Delivery Order Example](#) <sup>169</sup>
- [Testing the Prep Printer](#) <sup>170</sup>

### Shared Settings

The following settings are available in **Back Office>Settings>Peripherals**. All settings not preceded by an asterisk (\*) are shared by all prep printers.



Prep Printer Settings

### Print Settings

- **Print Qty Start:** Enter the character to use before the numeric quantity on the prep ticket
- **Print Qty End:** Enter the character to use after the numeric quantity on the prep ticket
- **Print Line Feeds Bottom:** Number of blank lines to print at the bottom of prep tickets
- **Print Line Feeds Top:** Number of blank lines to print at the top of prep tickets
- **Delete Prep Ticket Alerts:** Set to Yes to delete prep ticket alerts so that they are not printed again if the order is recalled and new items are added.
- **Print Date Time:** Set to Yes to print the date and time at the bottom of the prep ticket (centered in smallest character size)
- **Print Remove Asterisks:** Set to Yes to remove asterisks from menu item or modifier name on prep ticket
- **Print Header Double-Height:** Print prep ticket header text in double-height font
- **Print Header Double-Width:** Print prep ticket header text in double-wide font
- **Print Header Order Type:** Set to Yes to print the order type on the prep ticket header
- **Print Header Printer Name:** Set to Yes to print the printer name on the prep ticket header
- **Print Header Server Name:** Set to Yes to print the server name on the prep ticket header
- **Print Header Table Name:** Set to Yes to print the table name on the prep ticket header
- **Print Header Bar Tab Name:** Print bar tab name on prep tickets for reorders on the same bar tab
- **Print Header Time:** Set to Yes to print the current time on the prep ticket header
- **Print Customer Info:** Print customer name, address and phone (centered in smallest character size)
- **Print Guest:** Set to Yes to print guest number above menu items for order types that have guest assignment enabled
- **Print Menu Item Line Feed:** Set to Yes to insert a blank line after each menu item and optional is printed
- **Print Footer Double-Height:** Print prep ticket footer text in double-height font
- **Print Footer Double-Width:** Print prep ticket footer text in double-wide font
- **Print Footer Order Type:** Set to Yes to print the order type on the prep ticket footer
- **Print Footer Printer Name:** Set to Yes to print the printer name on the prep ticket footer
- **Print Footer Server Name:** Set to Yes to print the server name on the prep ticket footer
- **Print Footer Table Name:** Set to Yes to print the table name on the prep ticket footer
- **Print Footer Time:** Set to Yes to print the current time on the prep ticket footer

### Menu Items

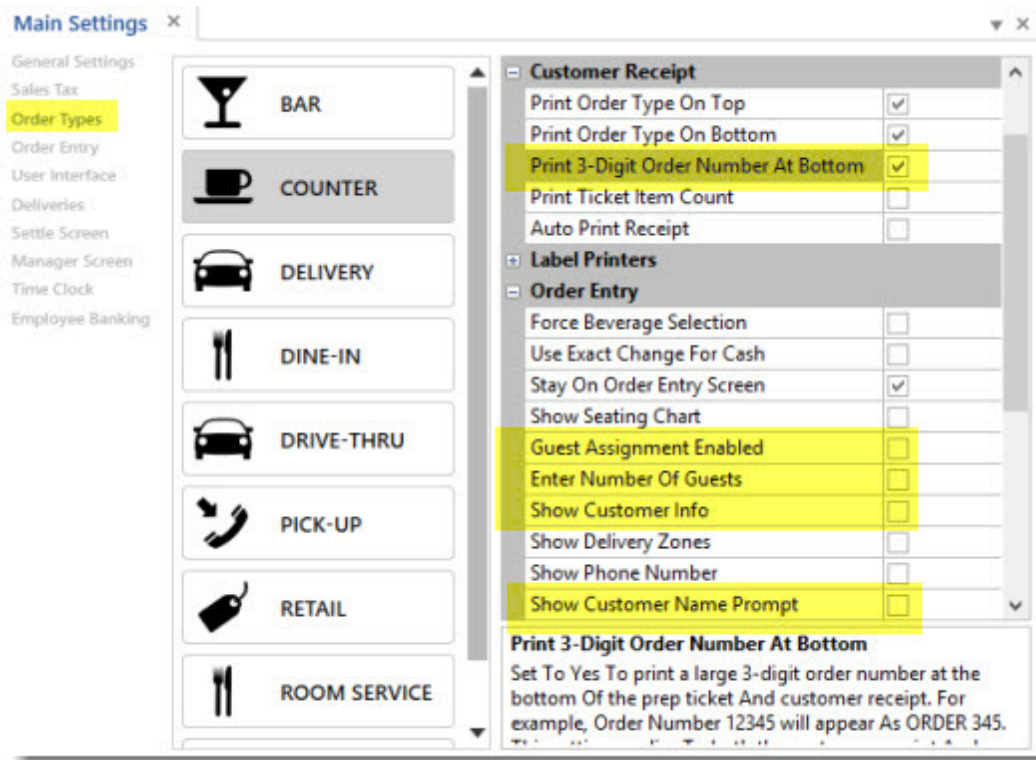
- **Print Menu Items Double-Height:** Print prep ticket menu items in double-height font
- **Print Menu Items Red:** Print prep ticket menu items in red
- **Print Menu Items Double-Width:** Print prep ticket menu items in double-wide font

### Modifiers

- **Print Modifier Level Asterisk:** Set to Yes to print an asterisk before and after the optional level description when sent to prep printer
- **Print Modifiers Double-Height:** Print prep order modifiers in double-height font
- **Print Modifiers Red:** Print prep order modifiers in red
- **Print Modifiers Double-Width:** Print prep order modifiers in double-wide font

### Order-Type Specific Settings

The following settings are set for specific order types in **Back Office>Settings>Main Settings>Order Types**.



- **Print 3-Digit Order Number At Bottom:** Set to Yes to print a large 3-digit order number at the bottom of the prep ticket and customer receipt. For example, Order Number 12345 will appear as ORDER 345. This setting applies to both the customer receipt and prep ticket.
- **Guest Assignment Enabled:** For Dine-In orders only, this setting must be enabled for the Print Guest setting shown above to take effect
- **Show Guest Select:** For Dine-In orders only, this setting must be enabled for the Print Guest setting shown above to take effect
- **Show Customer Info:** For Delivery or Pick-Up orders only, this setting must be enabled for the Print Customer Info setting shown above to take effect
- **Show Customer Name Prompt:** For Counter or Take-Out orders only, this setting must be enabled for the customer name to appear on the prep ticket as shown in the example below

### Examples

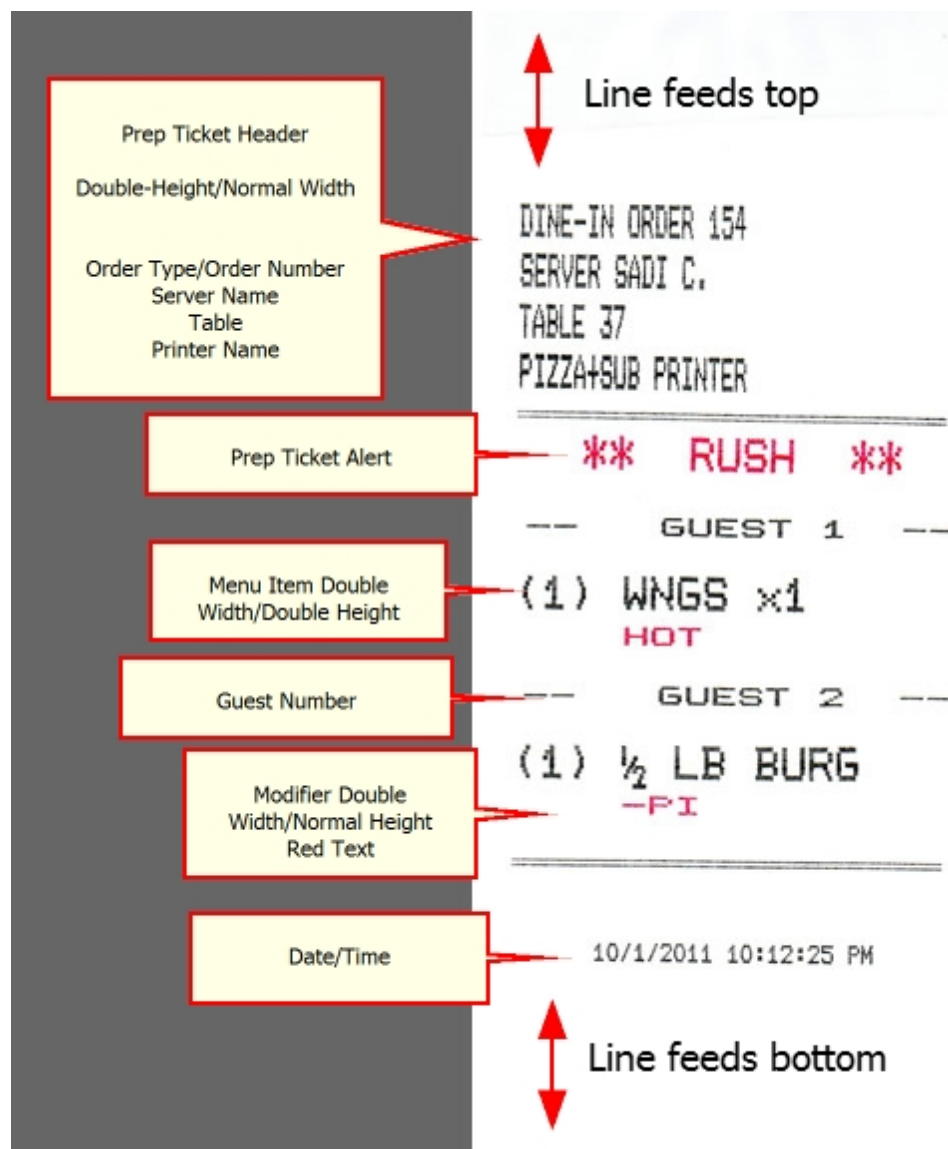
#### Dine-In Order

The following example shows a Dine-In order for 2 guests.



**Dine-In Order With Guest Assignment Enabled**

The prep ticket displays each customer's order separately with the prep ticket alert in red after the prep ticket header. Prep ticket header uses double-height/regular width characters, menu items use double-height/double width, modifiers use regular height/double-width and time is printed at the bottom.



Dine-In Prep Ticket Printed by Pos-X Xr210

### Counter Order

The customer name prompt appears for order types with Show Customer Name Prompt enabled. The name will print at the bottom of the prep ticket.

ENTER THE CUSTOMER NAME

JOE CUSTOMER

1 2 3 4 5 6 7 8 9 0 - @ ◀

Q W E R T Y U I O P \* @

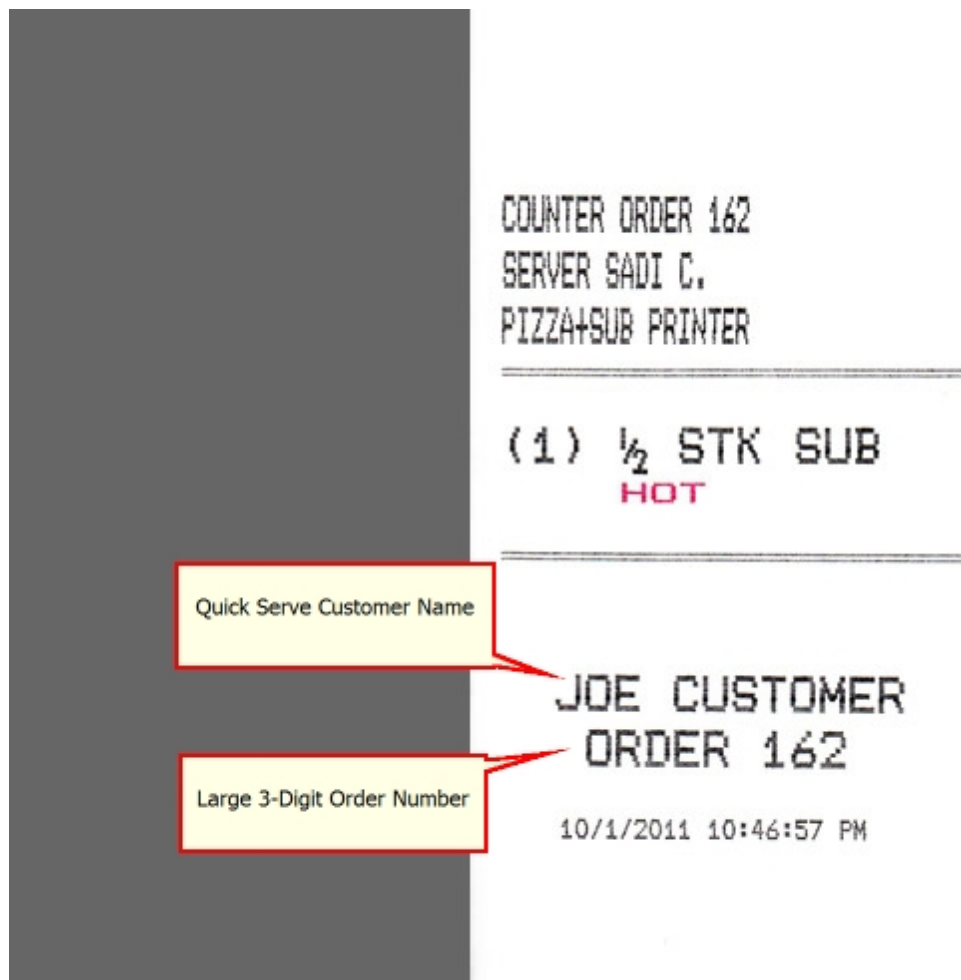
A S D F G H J K L % `

Z X C V B N M > . ▲

CANCEL [Grey Button] ➡

**Counter Order Customer Name Prompt**

The example counter order prep ticket shown below displays both the customer name and the 3-digit order number at the bottom. Prep ticket header uses double-height/regular width characters, menu items use double-height/double width, modifiers use regular height/double-width and time is printed at the bottom.

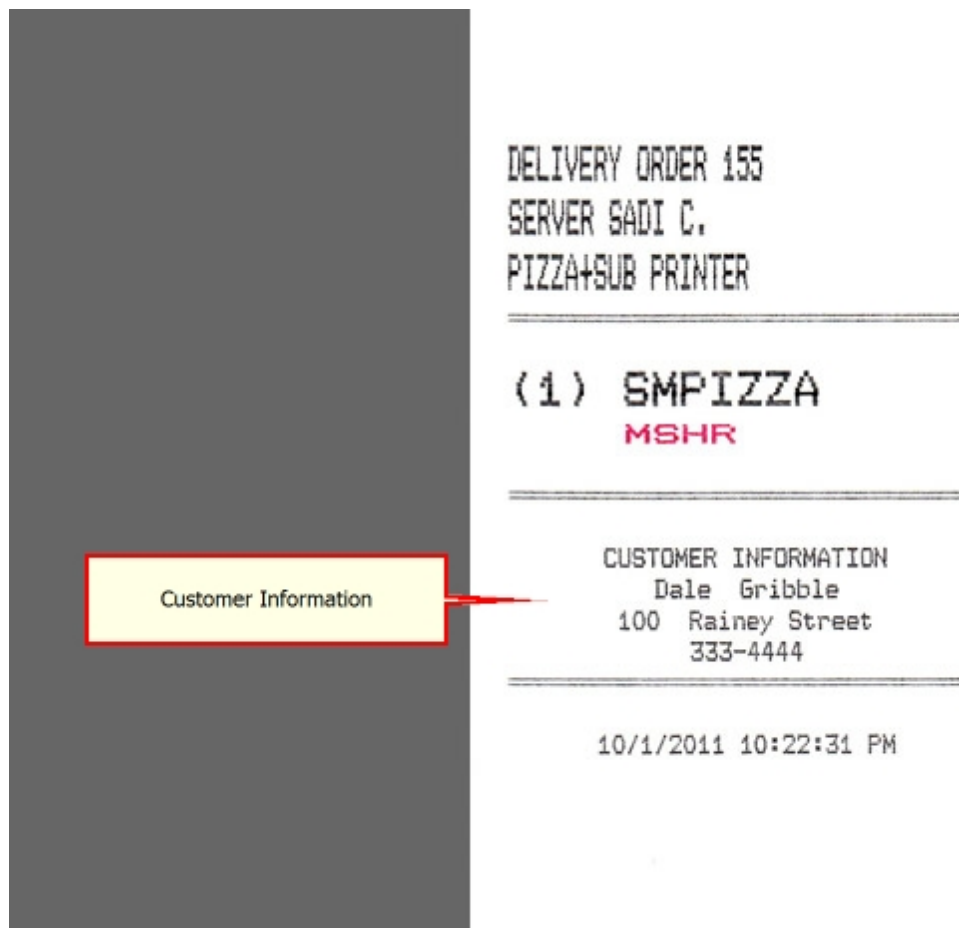


Counter Order Printed Using Pos-X Xr210

### Delivery Order

The delivery prep ticket shows customer information at the bottom. Prep ticket header uses double-height/regular width characters, menu items use double-height/double width, modifiers use regular height/double-width and time is printed at the bottom.





**Delivery Order Printed Using Pos-X Xr210**

### Testing the Prep Printer

After installing and configuring the prep printer, click the Test Print button to confirm that the settings are correct. Changes can be made and immediately tested without restarting AmigoPOS. Note that the Print button is disabled if the prep printer is not enabled.

Prep Printer Test

Select the Order Type

BAR PRINT TEST

Printer ID	1
*Printer Name (local setting)	EPSON TM-T20 Receipt
*Printer Type (local setting)	Epson (ESC/POS)
Print Large Order ID At Bottom	No
Bar Tab Name	Yes
Bar Upcharge Asterisk	Yes
Customer Information	Yes
Footer Customer Name	Yes
Footer Double Height	No
Footer Double Height	No
Footer Double Width	No
Footer Double Width	No
Footer Order Type	No
Footer Printer Name	No
Footer Server Name	No

#### Prep Printer Test

The following images show the same test prep ticket routed to 4 different printers with identical settings. Both Star printers are set to use Star Line Mode and both Pos-X printers are using the factory default Epson ESC/POS emulation. Note that red printing must be disabled for the Star SP500 or an error condition will result.

BAR ORDER 1234  
SERVER SADI C.  
BAR TAB FOR MARY

-----  
\*\* RUSH ORDER \*\*  
(1) DEMO VERSION  
DEMO VERSION  
-----

10/2/2011 1:04:18 PM

Star TSP100 (Thermal Paper)

BAR ORDER 1234  
SERVER SADI C.  
BAR TAB FOR MARY

-----  
\*\* RUSH ORDER \*\*  
(1) DEMO VERSION  
DEMO VERSION  
-----

10/2/2011 1:06:26 PM

Star SP500 (Purple Ribbon)

BAR ORDER 1234  
SERVER SADI C.  
BAR TAB FOR MARY

=====

\*\* RUSH ORDER \*\*

(1) DEMO VERSION  
DEMO VERSION

=====

10/2/2011 1:09:49 PM

Pos-X Xr200 (Purple Ribbon)

BAR ORDER 1234  
SERVER SADI C.  
BAR TAB FOR MARY

=====

\*\* RUSH ORDER \*\*

(1) DEMO VERSION  
DEMO VERSION

=====

10/2/2011 1:08:44 PM

Pos-X Xr210 (Red+Black Ribbon)

### 6.11.3 Print Servers

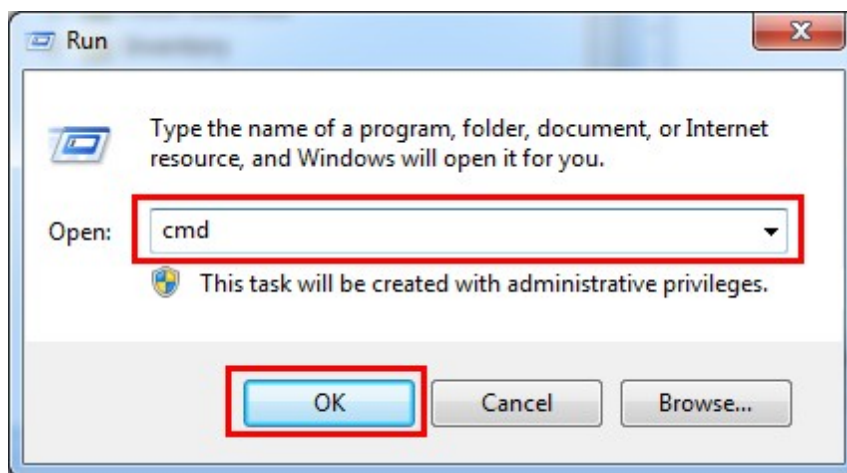
Print servers are used to simplify the installation and sharing of prep printers on the network. Print servers are available as an option on many popular impact and thermal printers. Printers with a parallel port require an external print server. The print server is connected directly to the network router and can communicate with a pos station on the network.

The following procedure describes the common scenario of an Epson TM-U220 impact printer attached to an inexpensive Netgear PS101 mini print server that is wired to a Netgear router with Windows 7 installed at the pos station. The steps are virtually identical for any wired or wireless print server or router using Windows 7/8/10. The following process must be repeated at each pos station for each prep printer.



**Netgear PS101 Print Server**

First determine the print server's IP address. In order to find the print server's IP address, open a web browser at any pos station or back office pc and enter the router's IP address. If the router's IP address is not known, click **Windows Start>Run**, enter **cmd** (or enter cmd in the *Search programs and files* box) and click OK.



**Open a Command Prompt**

At the prompt, enter **ipconfig** and press Enter to display the current network configuration. The router's IP address is the default gateway.

```

Administrator: C:\Windows\system32\cmd.exe

C:\Users\PosUser>ipconfig

Windows IP Configuration

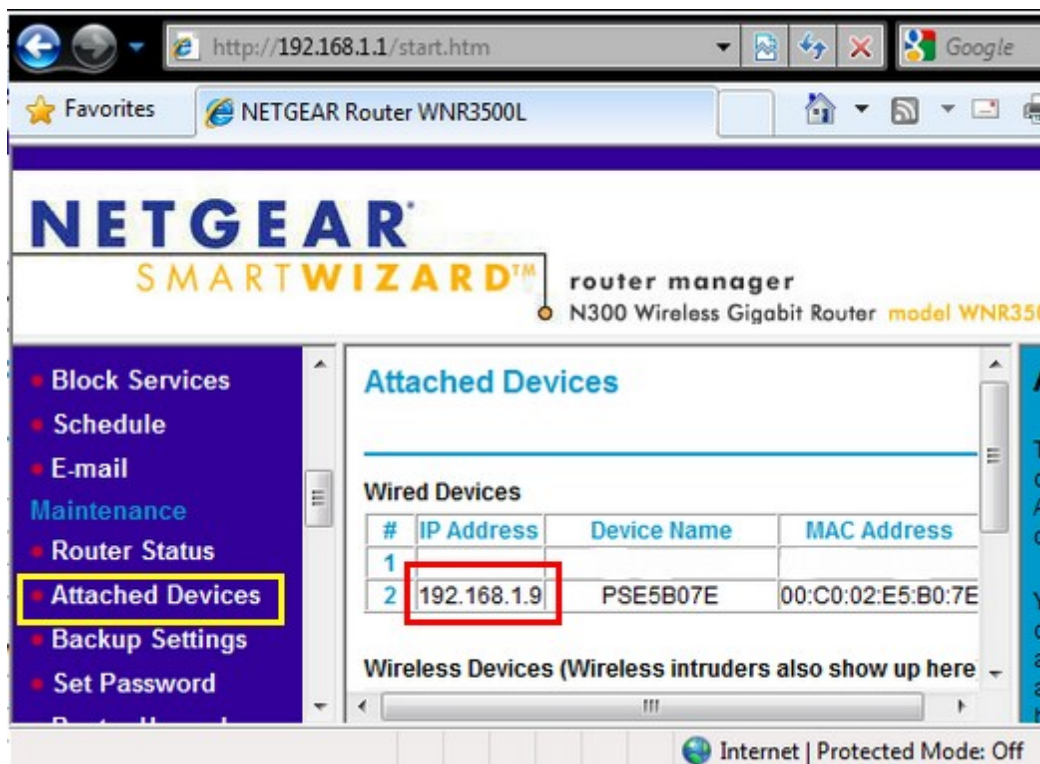
Wireless LAN adapter Wireless Network Connection:

Connection-specific DNS Suffix . : 
Link-local IPv6 Address . . . . . : 
IPv4 Address. . . . . : 192.168.1.2
Subnet Mask . . . . . : 255.255.255.0
Default Gateway . . . . . : 192.168.1.1

```

Run IPConfig

Open a web browser and enter the default gateway in the address bar to connect to the router. Click the **Attached Devices** link to view the IP address for each pc and other device connected to the router. This link may have other names for different routers; i.e. on Belkin routers it may be referred to as the DHCP client list. The Netgear PS101 default device name is easy to locate on the list. If the device name is not known, match the MAC address at the bottom of the printer server (or the box/documentation that accompanied the printer server) with the MAC address shown on the list of attached devices.



Netgear Router Browser Interface

Enter the print server's IP address in the browser's address bar to connect to the print server. Set the print server to use a static IP address so that the IP address does not change if the router is powered off or reset. In the example shown below, DHCP is disabled and the IP address is manually entered with the router IP address and the subnet mask. Click **Save** followed by **Reset** and wait approximately 60 seconds for the print server to reboot.

NETGEAR

[Server Status](#)

[Configure Server](#)

**[TCP/IP](#)**

[Printer Port](#)

[Reset](#)

### TCP/IP

#### LAN Settings

DHCP Client ☒ Disable ☐ Enable

IP Address 192 168 1 9

Subnet Mask 255 255 255 0

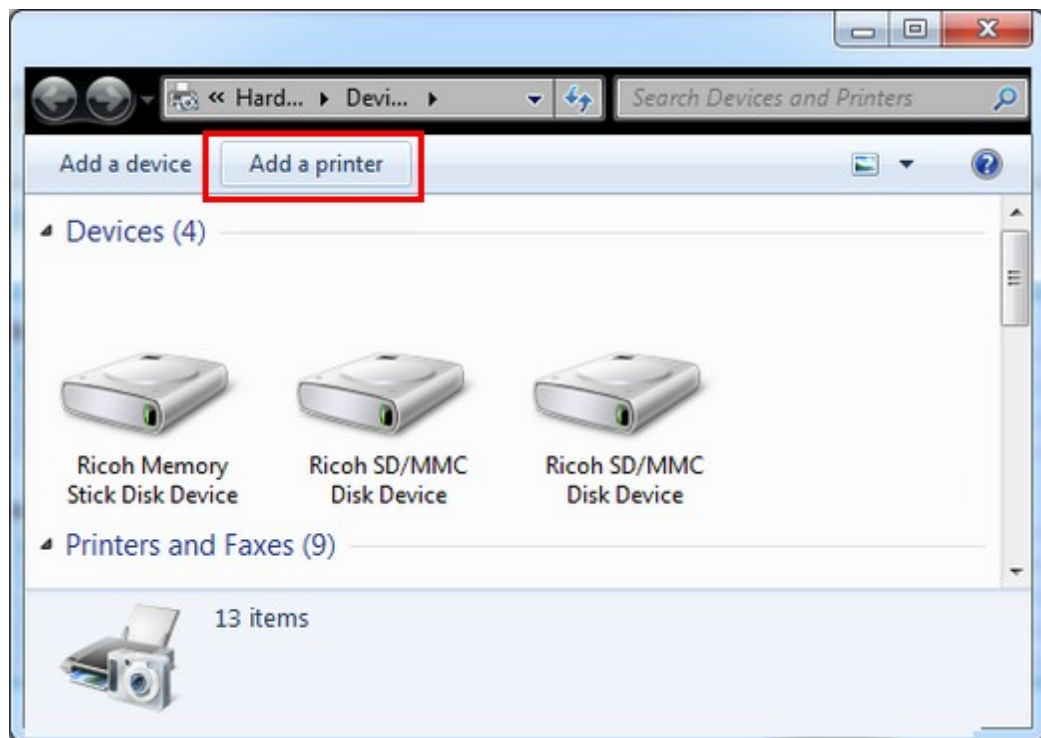
Gateway Address 192 168 1 1

[SAVE](#) [CANCEL](#)

#### Print Server Configuration

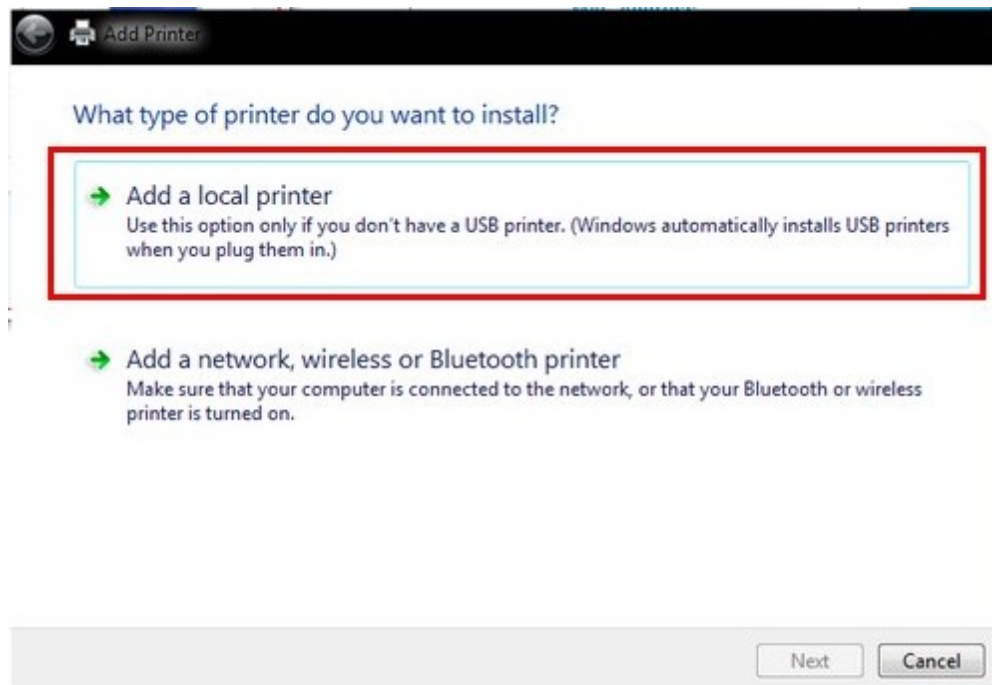
Now Windows is able to communicate with the print server at any pos station or office pc on the network. Install the printer at each pos station by opening the Windows Devices and Printers folder and clicking Add Printer at the top.





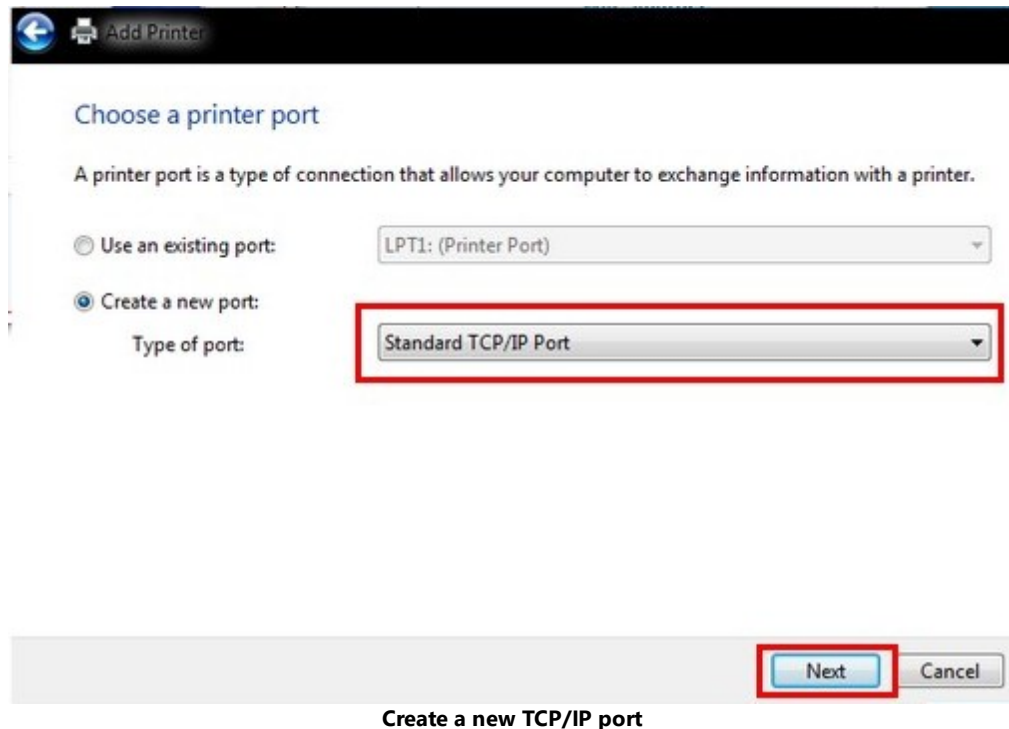
Devices and Printers Folder

Select **Add a local printer** on the first screen. Although the print server is a network device, a local port will be created at each pos station.



Select Local Printer

Click the **Create a new port** option and select **Standard TCP/IP Port** from the drop-down list. Click **Next**.



The screenshot shows the 'Add Printer' wizard at the 'Choose a printer port' step. The title bar says 'Add Printer'. Below the title, it says 'Choose a printer port'. A descriptive text states: 'A printer port is a type of connection that allows your computer to exchange information with a printer.' There are two radio button options: 'Use an existing port:' with a dropdown menu showing 'LPT1: (Printer Port)', and 'Create a new port:' which is selected. Below the 'Create a new port' option is a 'Type of port:' dropdown menu showing 'Standard TCP/IP Port'. At the bottom right, there are 'Next' and 'Cancel' buttons. A red box highlights the 'Standard TCP/IP Port' dropdown menu. Another red box highlights the 'Next' button.

Create a new TCP/IP port

Enter the print server's static IP address and un-check the box next to **Query the printer and automatically select the driver to use**. The default port name can be used. Click **Next**.

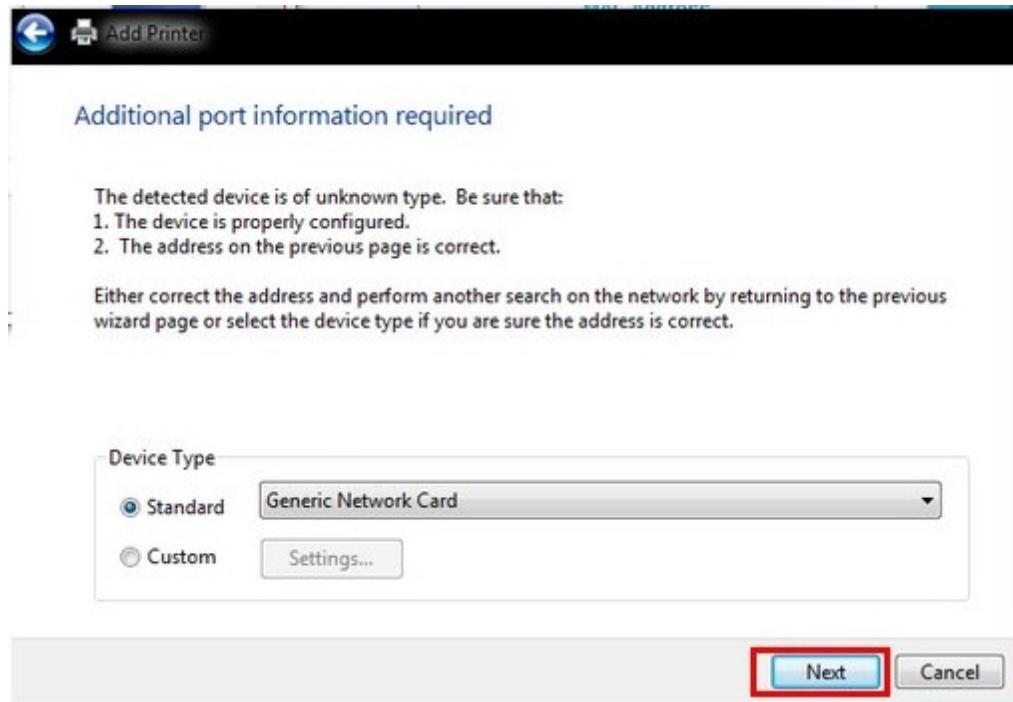


The screenshot shows the 'Add Printer' wizard at the 'Type a printer hostname or IP address' step. The title bar says 'Add Printer'. Below the title, it says 'Type a printer hostname or IP address'. There are three input fields: 'Device type:' with a dropdown menu showing 'TCP/IP Device', 'Hostname or IP address:' with the text '192.168.1.9', and 'Port name:' with the text '192.168.1.9'. Below these fields is a checkbox labeled 'Query the printer and automatically select the driver to use' which is unchecked. At the bottom right, there are 'Next' and 'Cancel' buttons. Red boxes highlight the 'Hostname or IP address' field, the 'Port name' field, and the 'Query the printer and automatically select the driver to use' checkbox. Another red box highlights the 'Next' button.

Set the IP Address

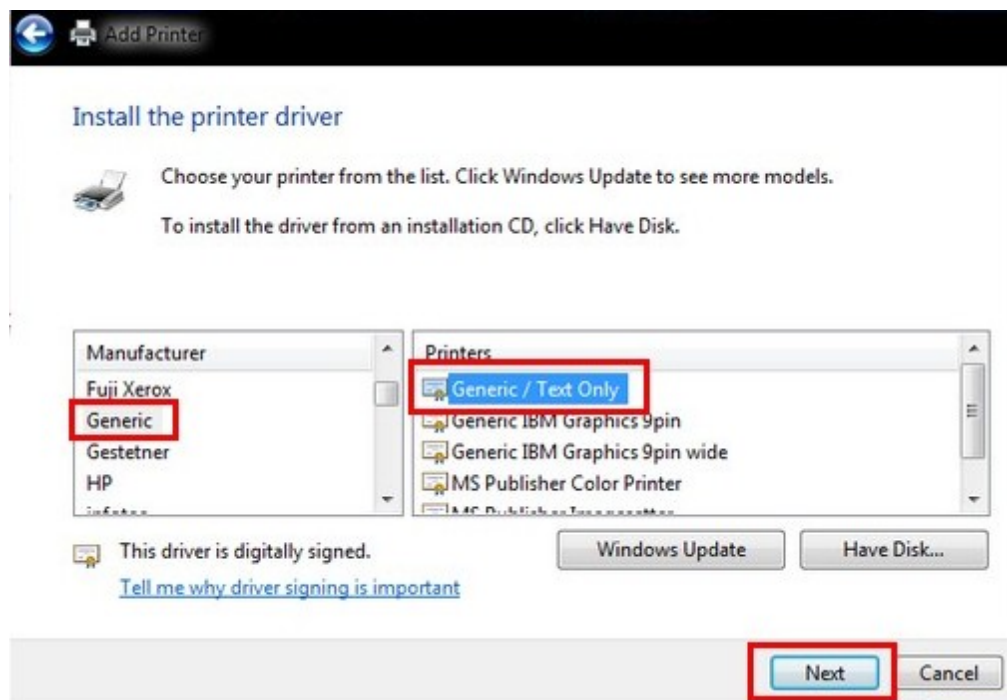


Windows will not recognize the print server and the standard device type is set to Generic Network Card. Click **Next**.



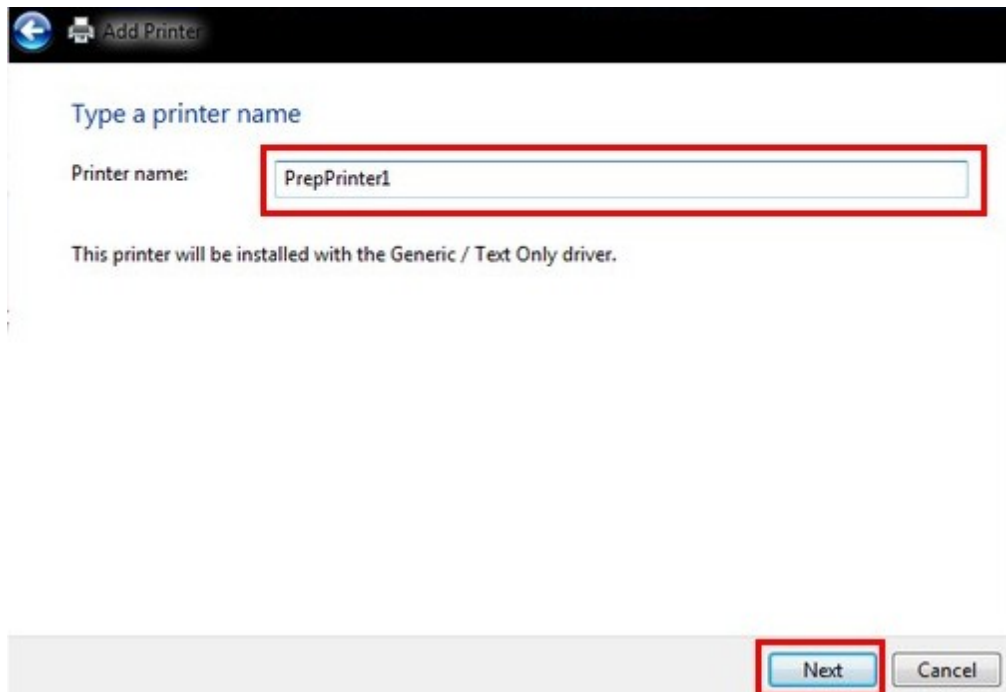
Use the generic network card device type

AmigoPOS will communicate with the printer using the printer's native command set so that a manufacturer driver is not required. Select the **Generic/Text Only** driver and click **Next**.



Select the Driver

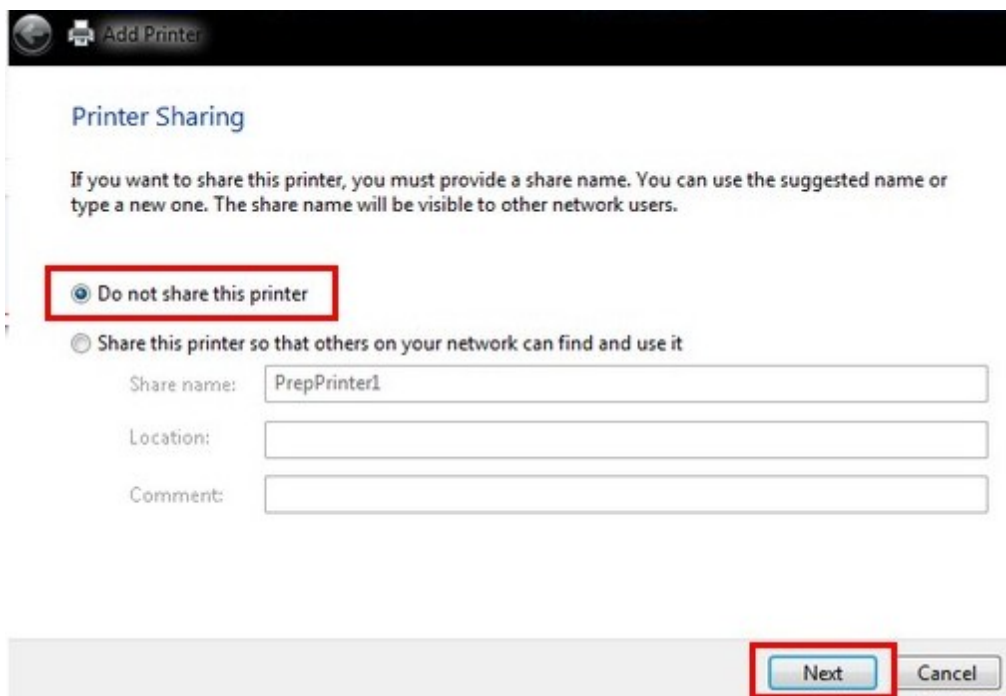
Enter a friendly name for the printer and click **Next**.



The screenshot shows the 'Add Printer' wizard window. The title bar says 'Add Printer'. The main heading is 'Type a printer name'. Below it, there is a label 'Printer name:' followed by a text input field containing 'PrepPrinter1'. Below the input field, it says 'This printer will be installed with the Generic / Text Only driver.' At the bottom right, there are two buttons: 'Next' and 'Cancel'. The 'Next' button is highlighted with a red rectangle.

#### Name the Printer

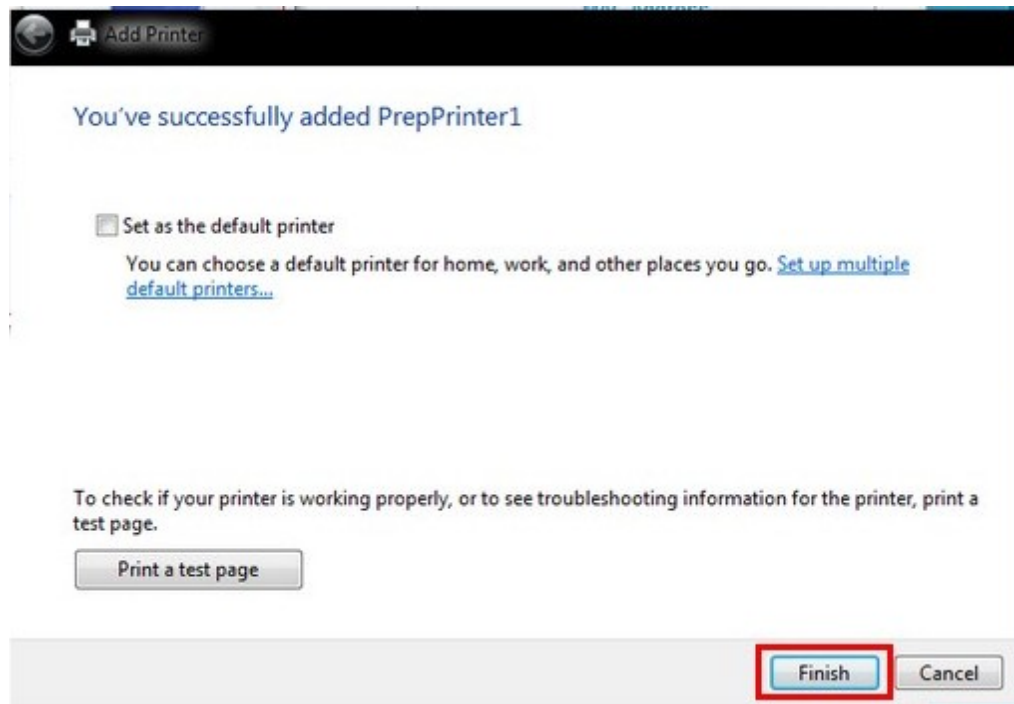
Since the printer will be installed at each pos station, disable printer sharing so that the other pos stations do not attempt to connect to the shared printer. Click **Next**.



The screenshot shows the 'Add Printer' wizard window, specifically the 'Printer Sharing' step. The title bar says 'Add Printer'. The main heading is 'Printer Sharing'. Below it, there is a paragraph: 'If you want to share this printer, you must provide a share name. You can use the suggested name or type a new one. The share name will be visible to other network users.' There are two radio button options. The first option, 'Do not share this printer', is selected and highlighted with a red rectangle. The second option is 'Share this printer so that others on your network can find and use it'. Below the second option, there are three text input fields: 'Share name:' (containing 'PrepPrinter1'), 'Location:', and 'Comment:'. At the bottom right, there are two buttons: 'Next' and 'Cancel'. The 'Next' button is highlighted with a red rectangle.

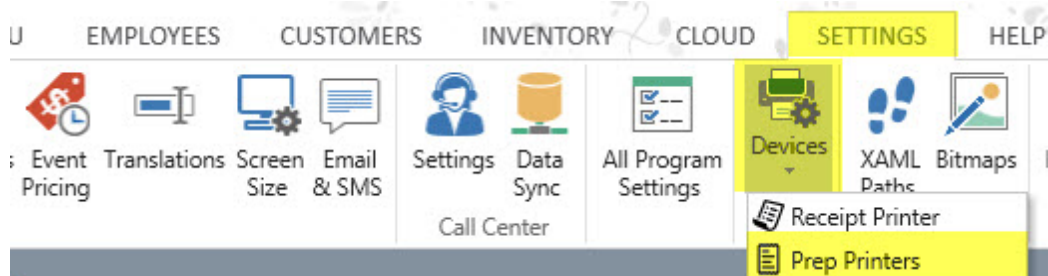
#### Disable Printer Sharing

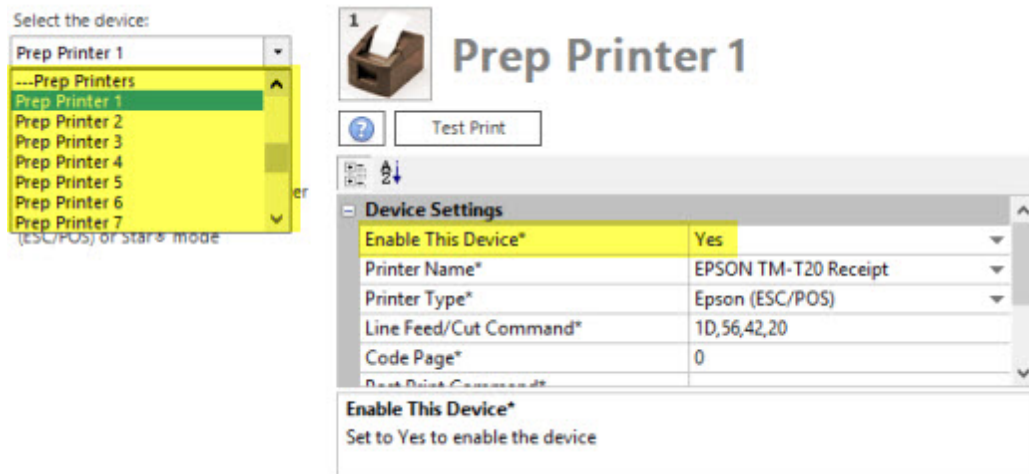
Do not set the printer as the default printer. Click **Next** to close the Add Printer wizard.



**Printer Added Successfully**

Open **Back Office>Settings>Peripherals** and select **Prep Printer 1** from the drop-down list. Enable the device and select the new printer name from the drop-down list. The Line Feed/Cut Command is not required for most common printers. Click the Test Print button to confirm that the prep printer is configured correctly. Note that the prep printer settings are stored in the local system registry and must be set at each pos station independently. Repeat the process for each additional prep printer before moving on to the next pos station.





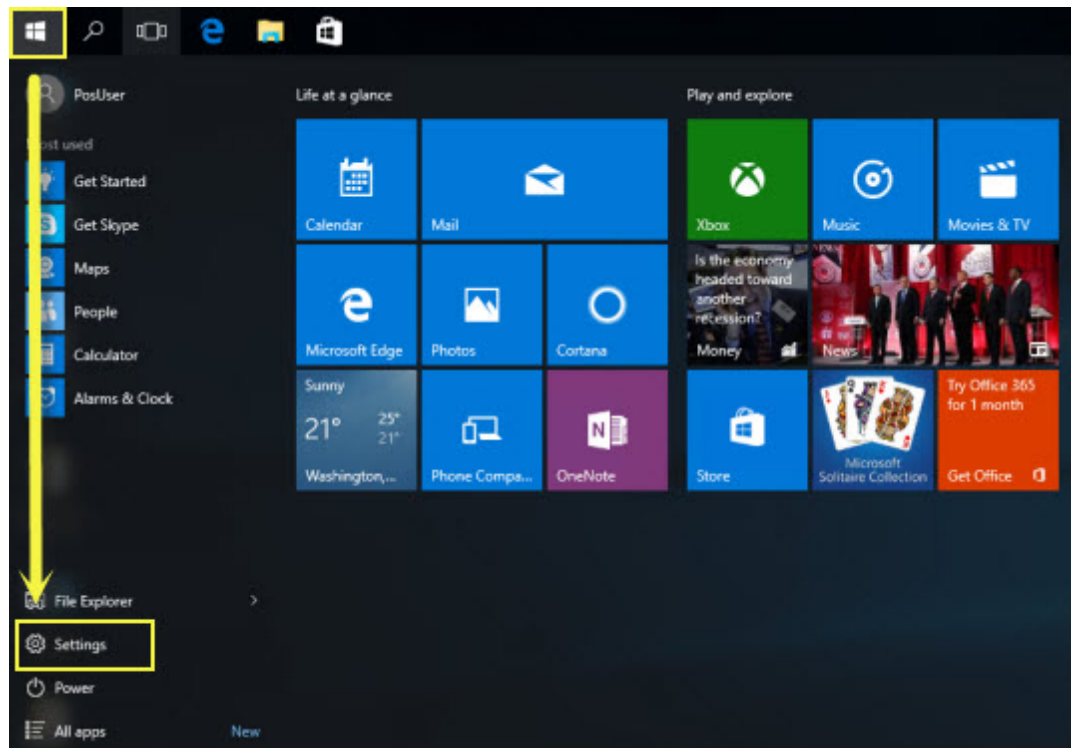
## 6.12 Receipt Printer

### 6.12.1 Installation

#### 6.12.1.1 Installation (Windows 10)

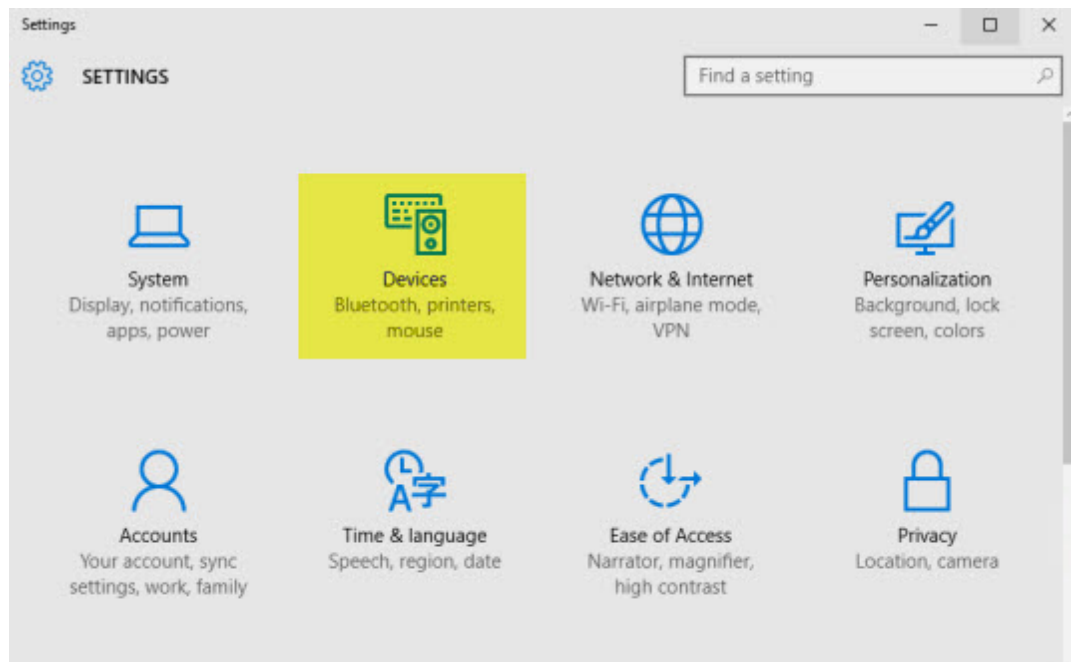
One receipt printer can be installed on each pos station running AmigoPOS. Adding a receipt printer correctly is vital to a successful installation. The following instructions describe the process of manually setting up a typical receipt printer with a parallel or serial interface. Manual installation using the MS Windows 10 Add Printer Wizard. The following instructions do not apply to most USB receipt printers, which require manufacturer device drivers. Refer to the [Star USB Printer Installation](#)<sup>[223]</sup> topic or the [Epson USB Printer Installation](#)<sup>[208]</sup> topic for specific instructions to install a USB interface receipt printer.

1. Click Start | **Settings** to open the settings window.



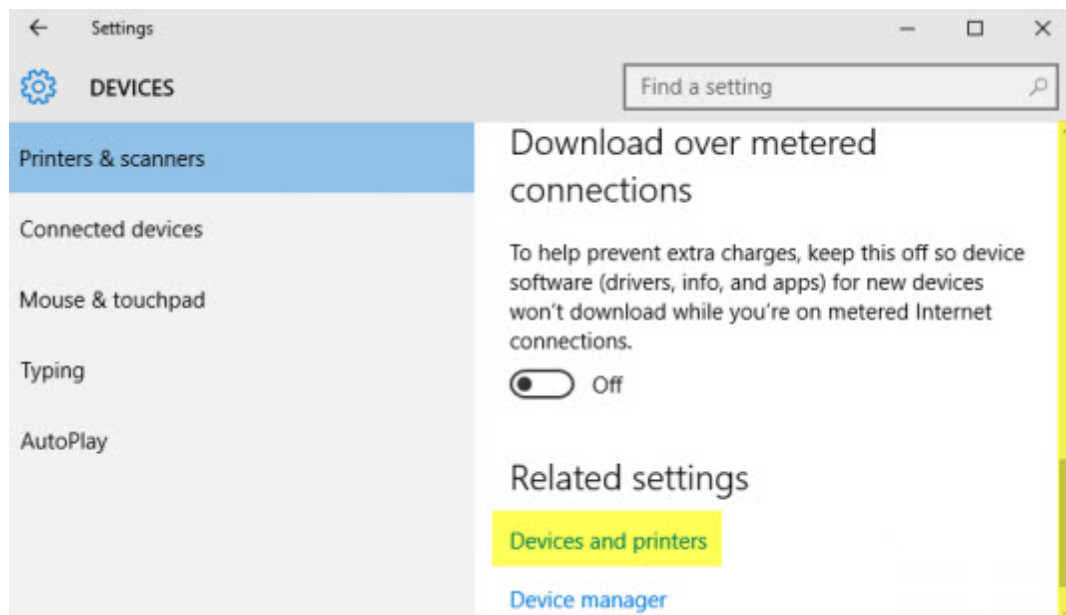
#### Windows 10 Start Menu

2. Select **Devices**.



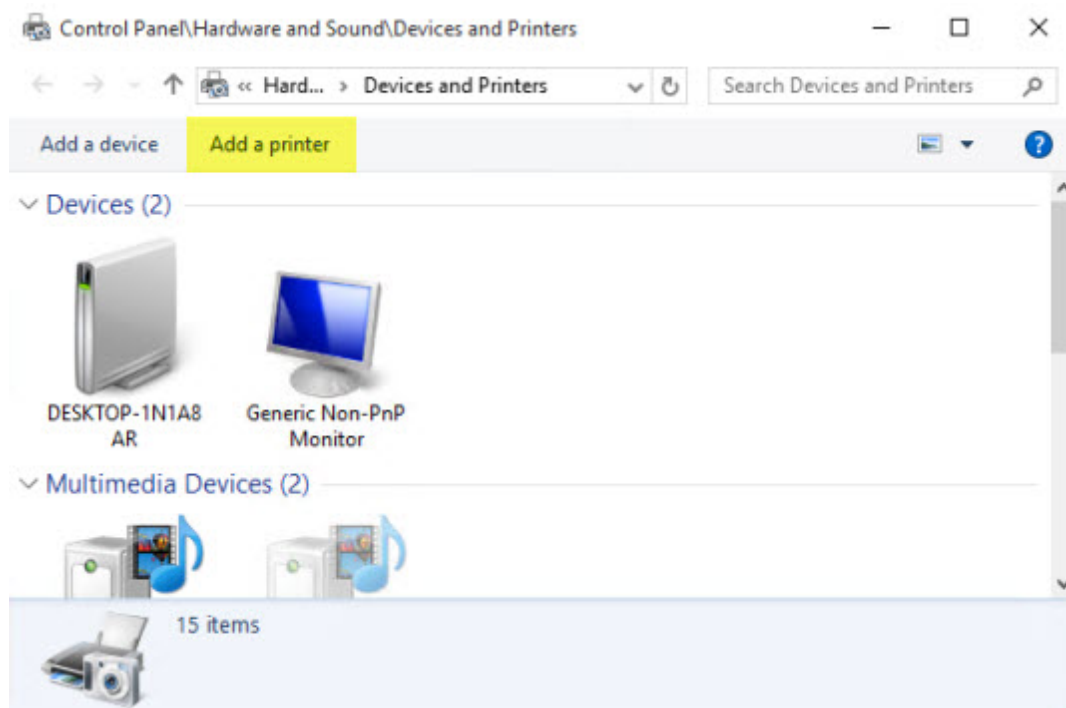
#### Windows 10 Settings Windows

3. Scroll to the bottom and select **Devices and printers**.



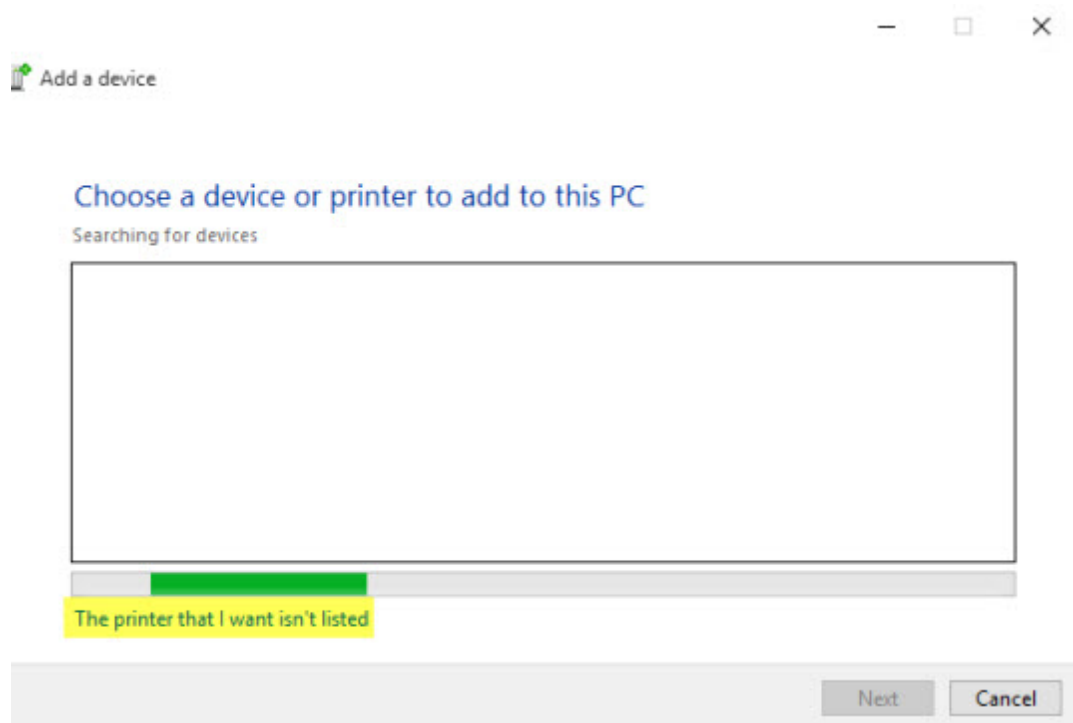
Windows 10 Devices Window

4. Click **Add a printer** on the explorer bar. The printer wizard will appear.



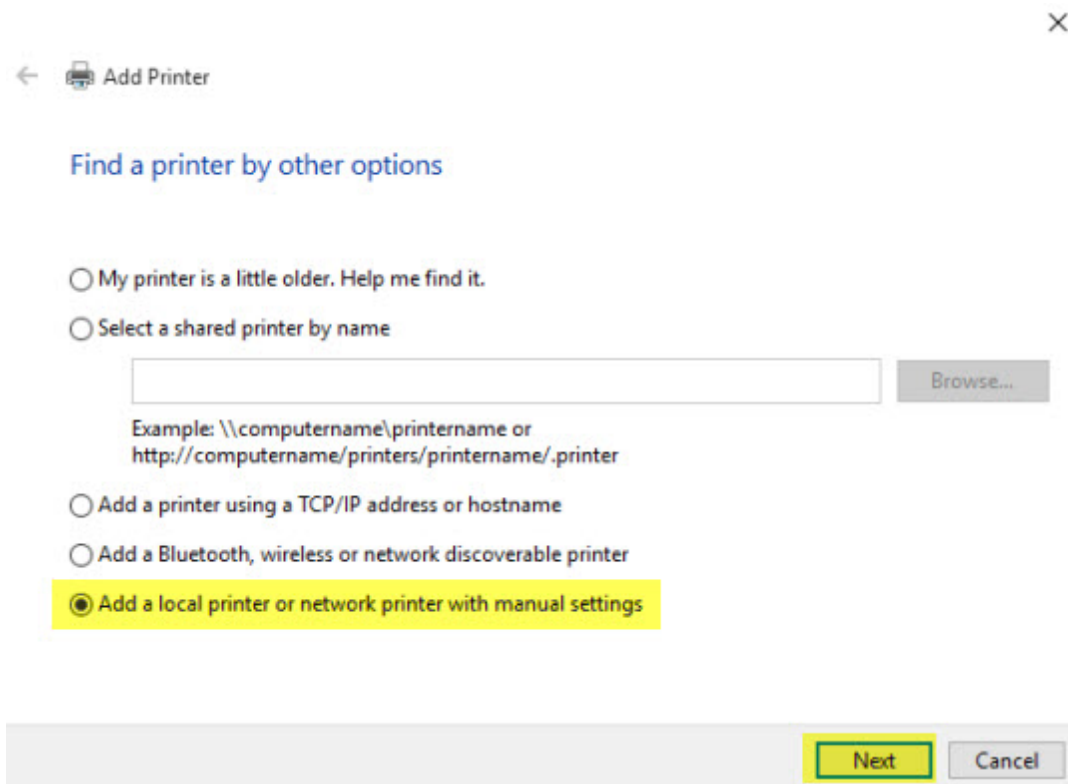
Click Add a Printer to start the Add Printer Wizard

5. Click **The printer that I want isn't listed.**



**Windows 10 Add Printer Wizard**


6. Select **Add a local printer or network printer with manual settings** and click **Next**.





#### Windows 10 Add Printer Wizard

7. Select the port to which the printer is connected and click **Next**.





  Add Printer

### Choose a printer port

A printer port is a type of connection that allows your computer to exchange information with a printer.

☒ Use an existing port:

LPT1: (Printer Port) ▾

☐ Create a new port:

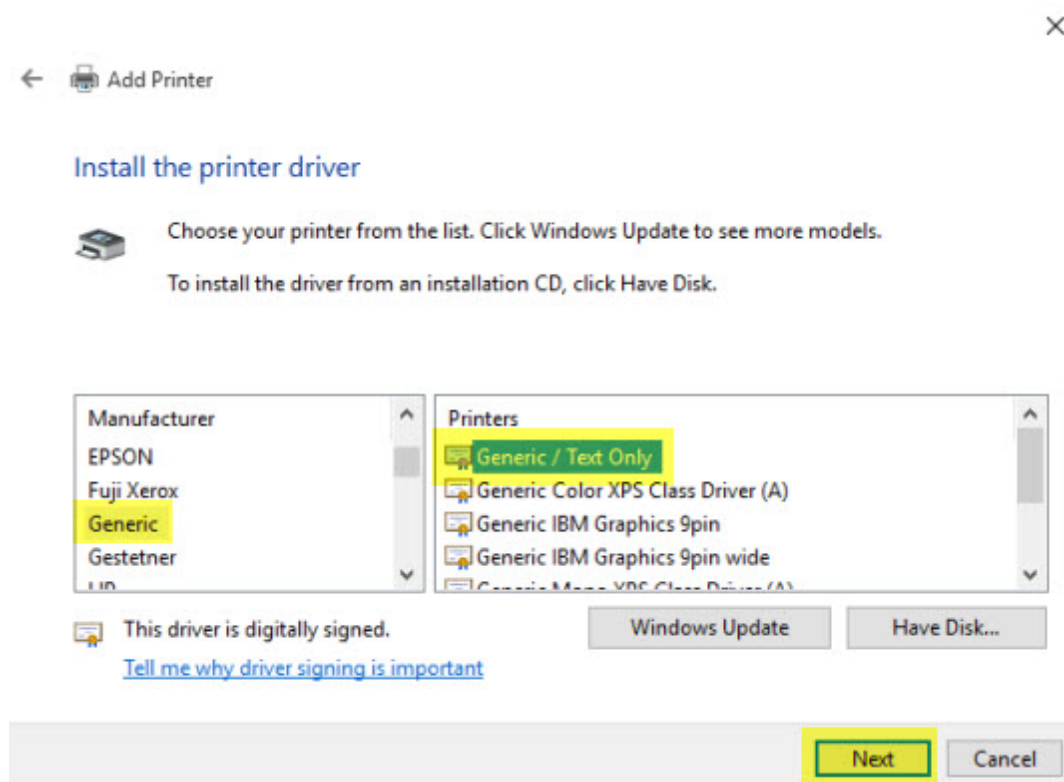
Type of port: Local Port ▾

Next

Cancel


#### Printer Port Selection



8. Select the **Generic/Text Only** printer driver and click **Next**.



#### Generic / Text Only Driver

9. Enter a friendly name for the receipt printer and click **Next**.



  Add Printer

Type a printer name

Printer name:


This printer will be installed with the Generic / Text Only driver.



Next

Cancel

**Printer Name**

10. If sharing this printer on the network, specify the share name. Receipt printers are generally not shared unless located at a bar pos station, where the receipt printer may also function as a prep printer. Click **Next** to continue.



  Add Printer

### Printer Sharing

If you want to share this printer, you must provide a share name. You can use the suggested name or type a new one. The share name will be visible to other network users.

☒ Do not share this printer

☐ Share this printer so that others on your network can find and use it

Share name:

Location:

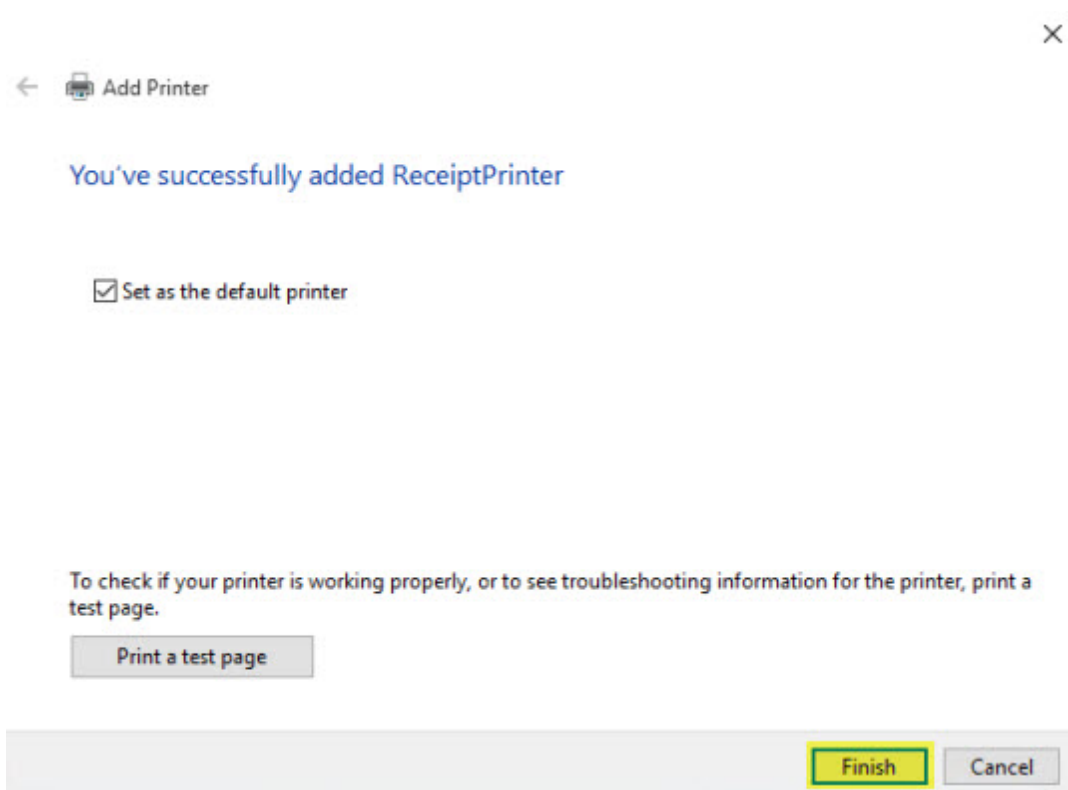
Comment:

Next

Cancel

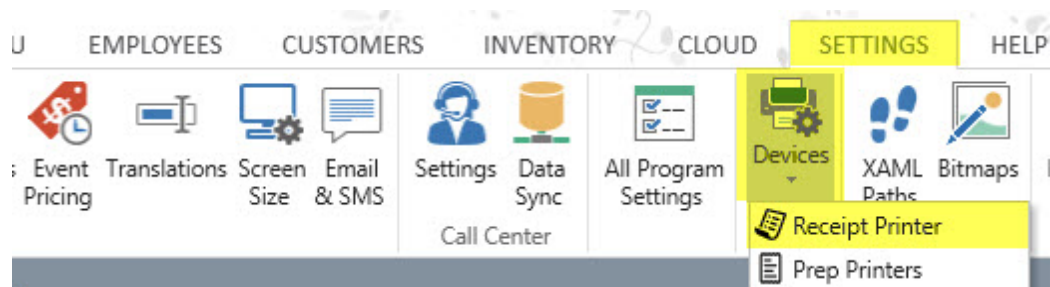
#### Printer Sharing

11. Click **Finish** to complete the Add Printer Wizard. There may be a short delay while the drivers are copied to the system folders.



#### Completing the Add Printer Wizard


12. In AmigoPOS, navigate to Back Office/Settings/Peripherals/ and select the printer name from the drop-down list. Select the appropriate printer type and click the **Test Receipt** button to confirm that the printer is installed correctly.







#### Back Office/Settings/Peripherals

Select the device:  
**Receipt Printer**

Additional Info:  
 Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

 **Receipt Printer**

General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Epson (ESC/POS)
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0

**Enable This Device\***  
 Set to Yes to enable the device

Receipt Printer Configuration

### 6.12.1.2 Installation (Windows 8)

One receipt printer can be installed on each pos station running AmigoPOS. Adding a receipt printer correctly is vital to a successful installation. The following instructions describe the process of manually setting up a typical receipt printer with a parallel or serial interface. Manual installation using the MS Windows 8 Add Printer Wizard. The following instructions do not apply to most USB receipt printers, which require manufacturer device drivers. Refer to the [Star USB Printer Installation](#)<sup>[223]</sup> topic or the [Epson USB Printer Installation](#)<sup>[208]</sup> topic for specific instructions to install a USB interface receipt printer.

1. Click the search icon at the top right of the start screen.



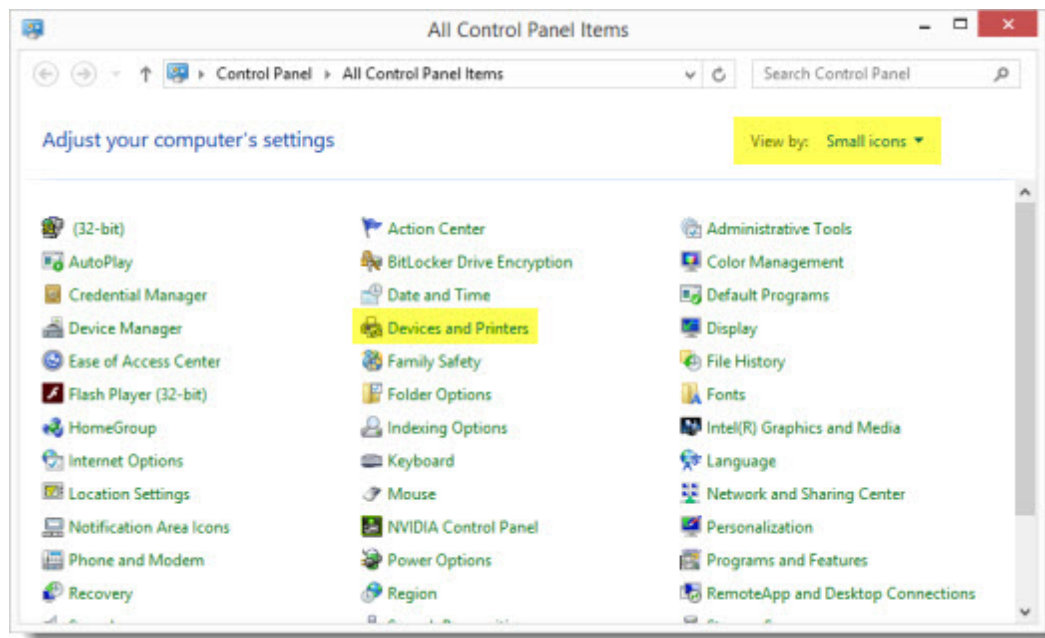
#### Windows 8 Start Menu

2. Enter **Control Panel** in the search box and select the first icon in the search results pane.



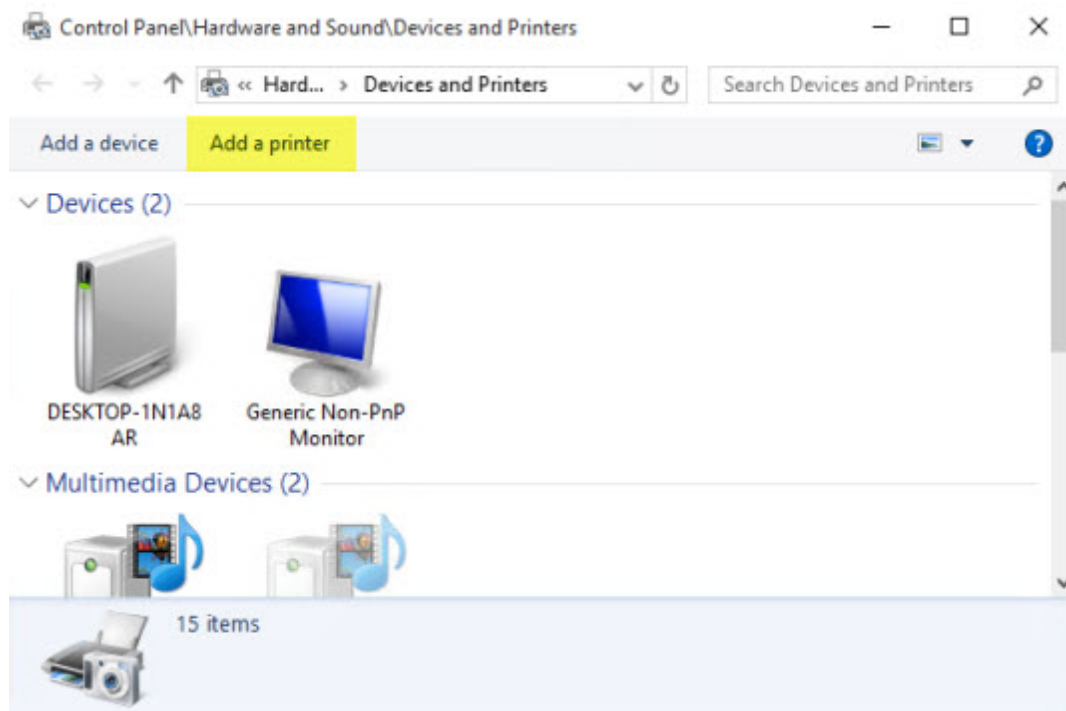
#### Windows 8 Search

3. Ensure that the Small icons view is selected and click **Devices and Printers**.



Windows 8 Control Panel

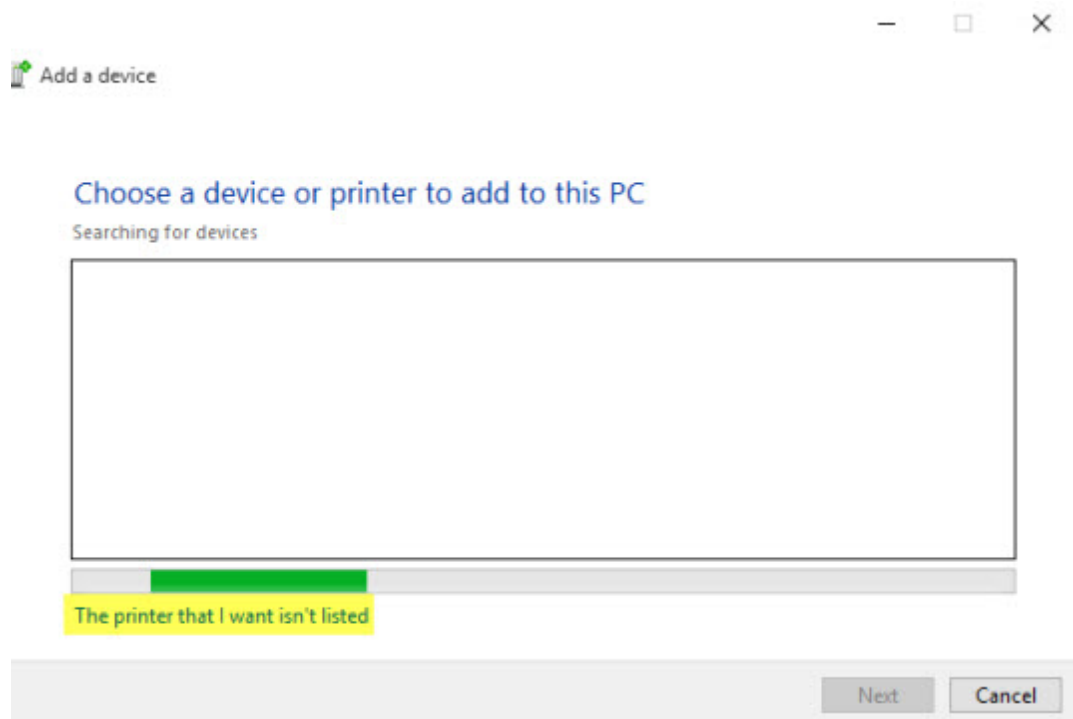
4. Click **Add a printer** on the explorer bar. The printer wizard will appear.



Click Add a Printer to start the Add Printer Wizard

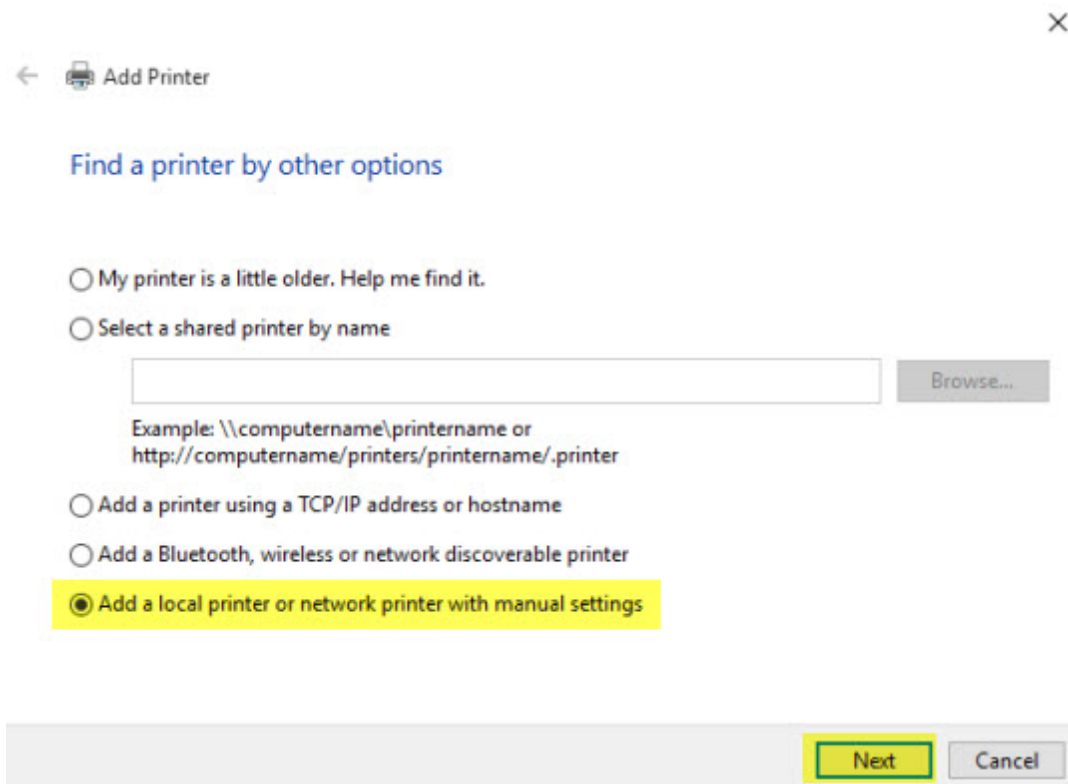


5. Click **The printer that I want isn't listed.**




**Windows 10 Add Printer Wizard**



6. Select **Add a local printer or network printer with manual settings** and click **Next**.



#### Windows 8 Add Printer Wizard

7. Select the port to which the printer is connected and click **Next**.



  Add Printer

### Choose a printer port

A printer port is a type of connection that allows your computer to exchange information with a printer.

☒ Use an existing port:

LPT1: (Printer Port) ▾

☐ Create a new port:

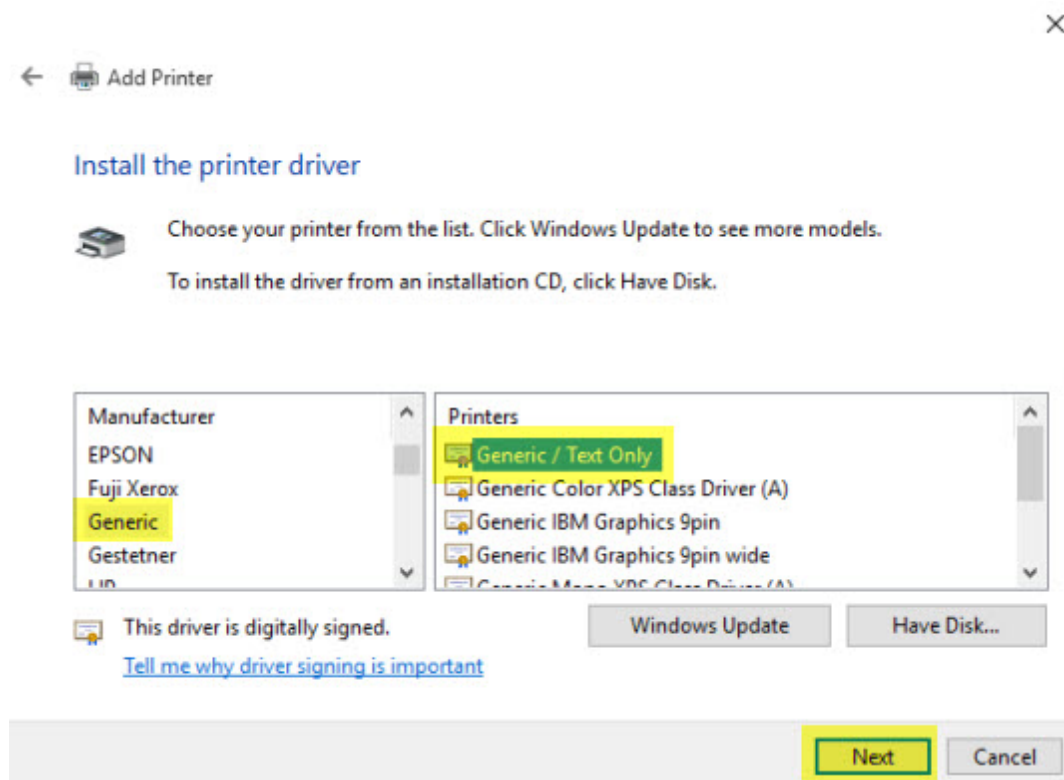
Type of port: Local Port ▾

Next

Cancel


#### Printer Port Selection



8. Select the **Generic/Text Only** printer driver and click **Next**.



#### Generic / Text Only Driver

9. Enter a friendly name for the receipt printer and click **Next**.



  Add Printer

Type a printer name

Printer name:

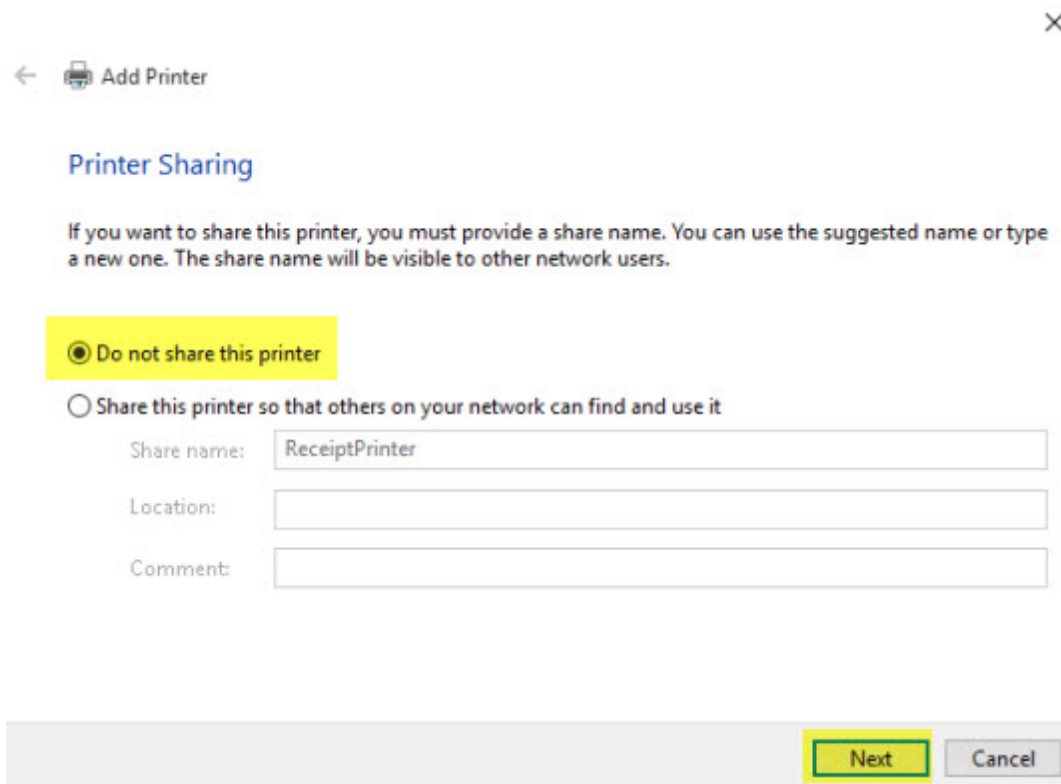
This printer will be installed with the Generic / Text Only driver.

Next

Cancel

**Printer Name**

10. If sharing this printer on the network, specify the share name. Receipt printers are generally not shared unless located at a bar pos station, where the receipt printer may also function as a prep printer. Click **Next** to continue.



The screenshot shows the 'Add Printer' wizard in Windows. At the top right is a close button (X). Below the title bar is a back arrow and the text 'Add Printer'. The main heading is 'Printer Sharing'. Below this is a paragraph: 'If you want to share this printer, you must provide a share name. You can use the suggested name or type a new one. The share name will be visible to other network users.' There are two radio button options. The first is 'Do not share this printer', which is selected and highlighted with a yellow background. The second is 'Share this printer so that others on your network can find and use it'. Below the second option are three text input fields: 'Share name:' with the text 'ReceiptPrinter', 'Location:', and 'Comment:'. At the bottom right are two buttons: 'Next' (highlighted with a yellow border) and 'Cancel'.

← Add Printer

### Printer Sharing

If you want to share this printer, you must provide a share name. You can use the suggested name or type a new one. The share name will be visible to other network users.

☒ Do not share this printer

☐ Share this printer so that others on your network can find and use it

Share name: ReceiptPrinter

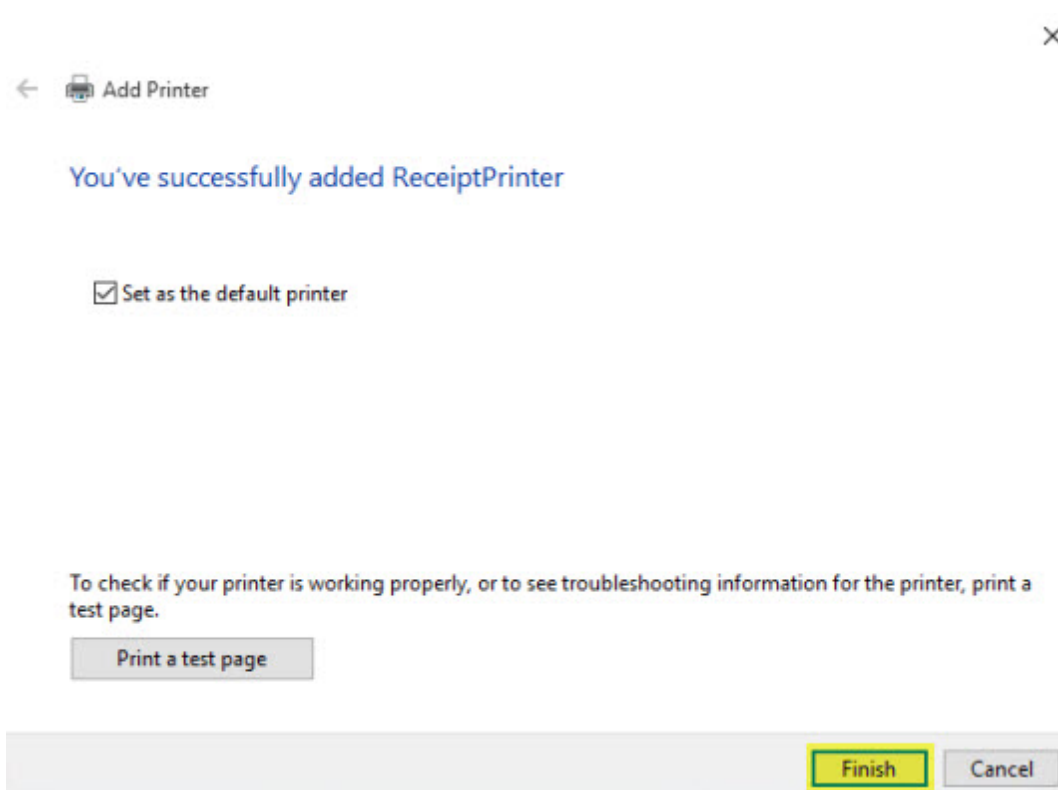
Location:

Comment:

Next Cancel

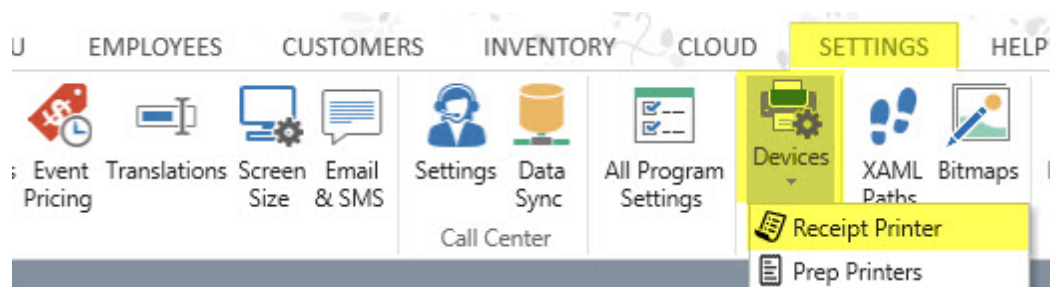
#### Printer Sharing

11. Click **Finish** to complete the Add Printer Wizard. There may be a short delay while the drivers are copied to the system folders.



#### Completing the Add Printer Wizard


12. In AmigoPOS, navigate to Back Office/Settings/Peripherals/ and select the printer name from the drop-down list. Select the appropriate printer type and click the **Test Receipt** button to confirm that the printer is installed correctly.








#### Back Office/Settings/Peripherals

Select the device:  
**Receipt Printer**

Additional Info:  
 Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

 **Receipt Printer**

General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Epson (ESC/POS)
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0

**Enable This Device\***  
 Set to Yes to enable the device

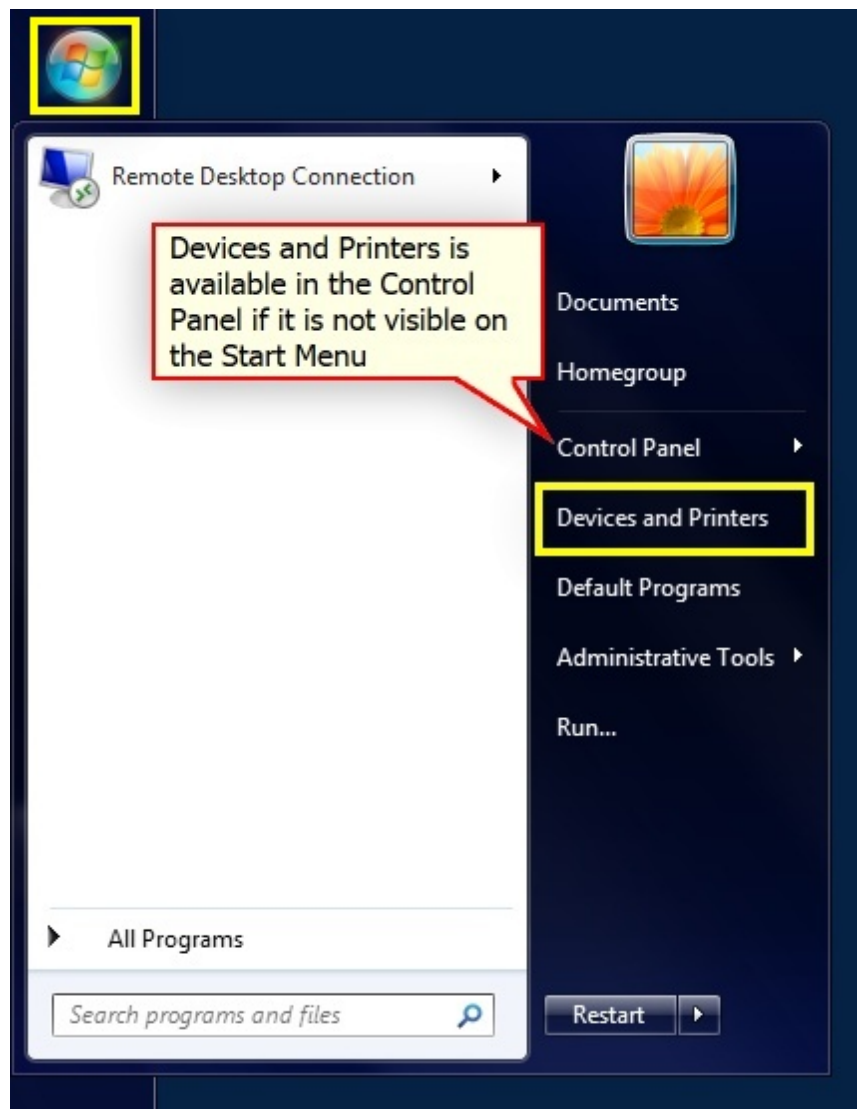
Receipt Printer Configuration

### 6.12.1.3 Installation (Windows 7)

One receipt printer can be installed on each pos station running AmigoPOS. Adding a receipt printer correctly is vital to a successful installation. The following instructions describe the process of manually setting up a typical receipt printer with a parallel or serial interface. Manual installation using the MS Windows 7 Add Printer Wizard. The following instructions do not apply to most USB receipt printers, which require manufacturer device drivers. Refer to the [Star USB Printer Installation](#)<sup>[223]</sup> topic or the [Epson USB Printer Installation](#)<sup>[208]</sup> topic for specific instructions to install a USB interface receipt printer.

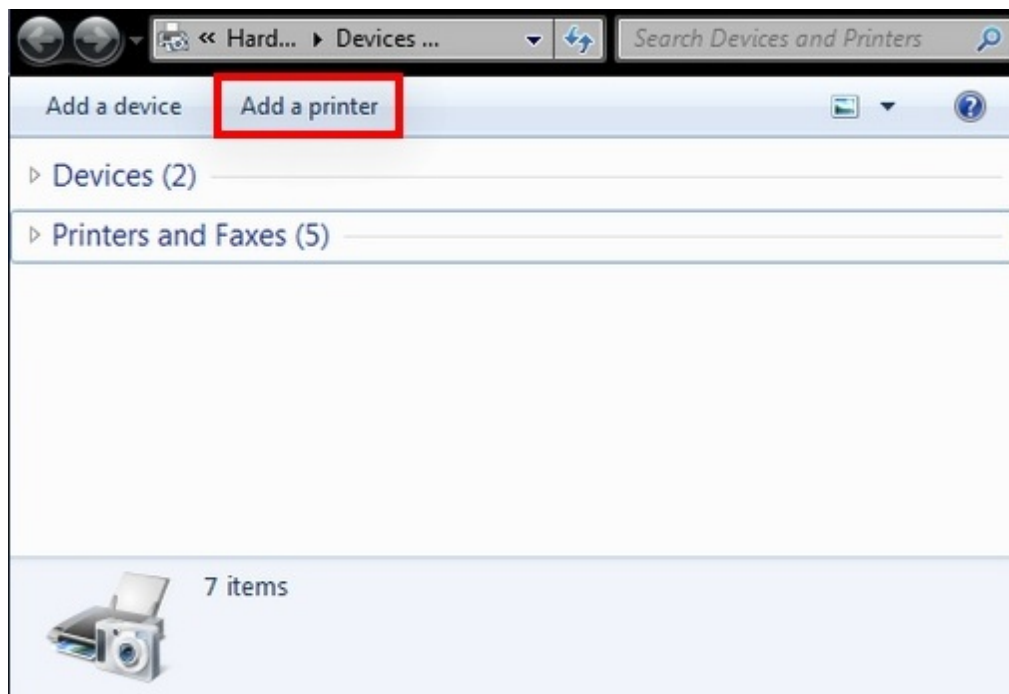
1. Click Start | Devices and Printers. The Windows Devices and Printers folder will appear.





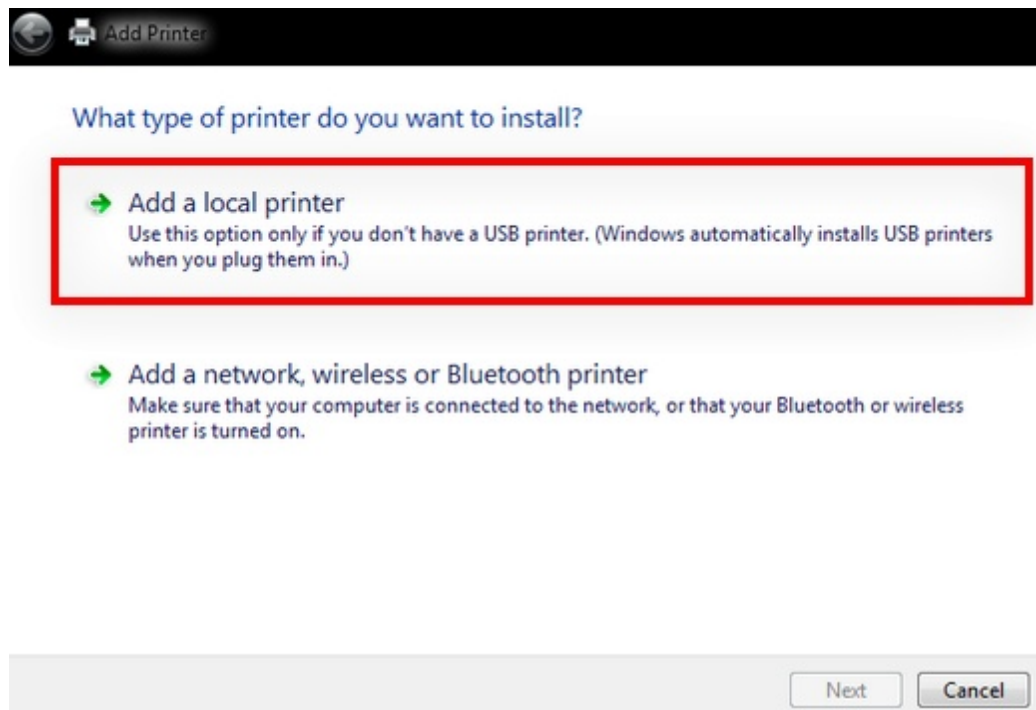
**Windows 7 Devices and Printers Folder**

2. Click **Add a printer** on the explorer bar. The printer wizard will appear.



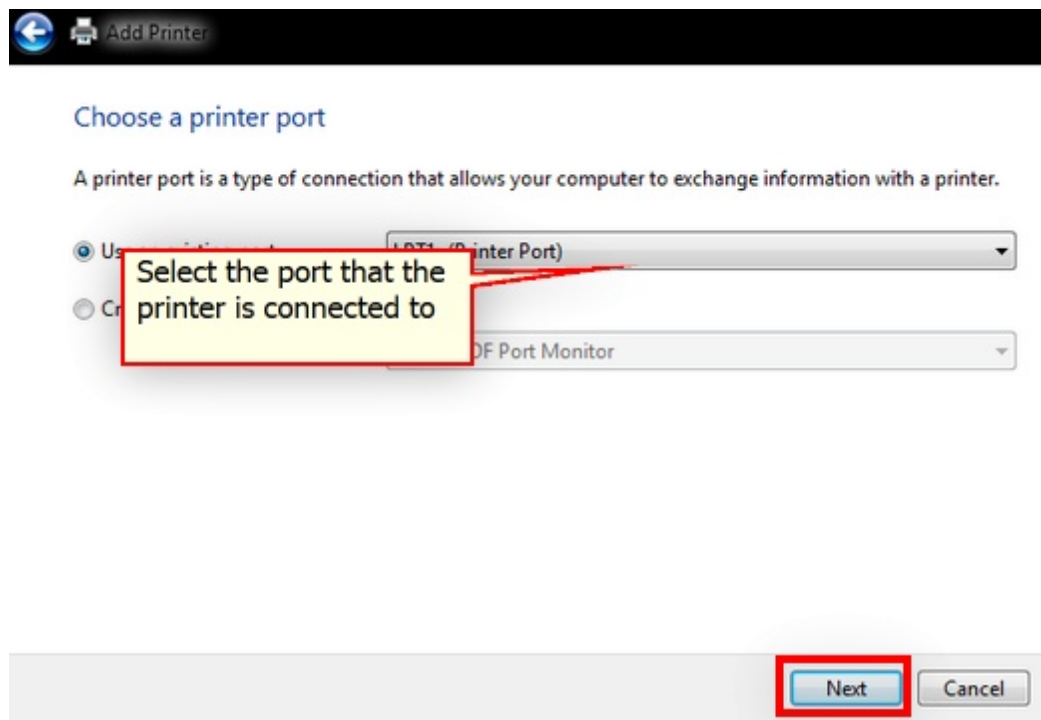
Click Add a Printer to start the Add Printer Wizard

3. Select **Add a local printer**.



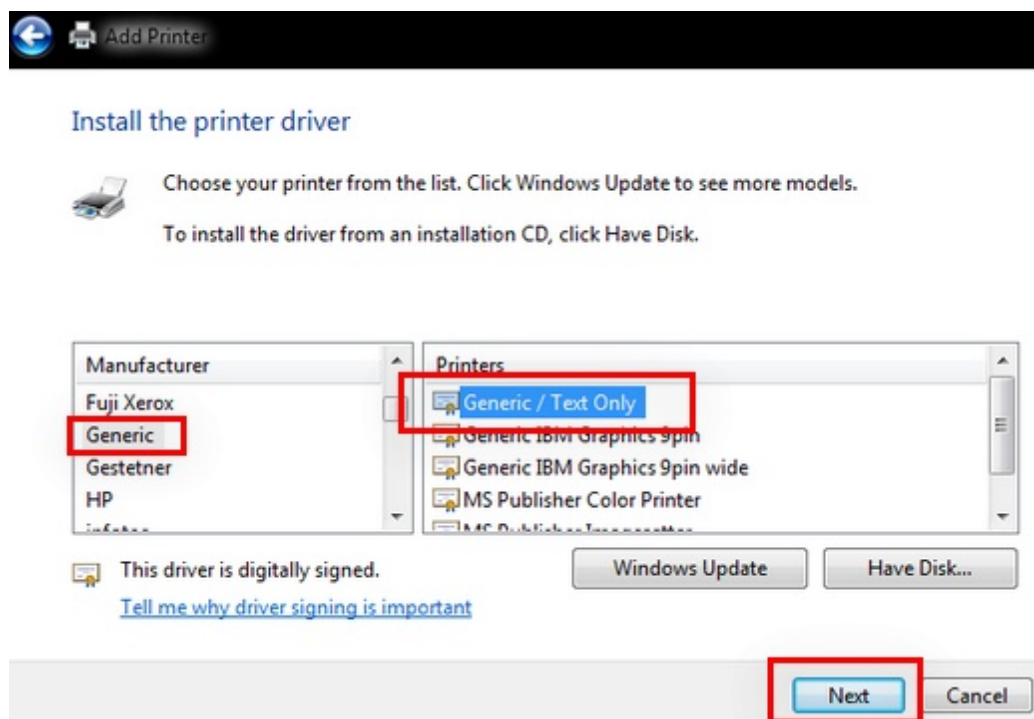
Windows7 Add Printer Wizard

4. Select the port to which the printer is connected and click **Next** to continue.



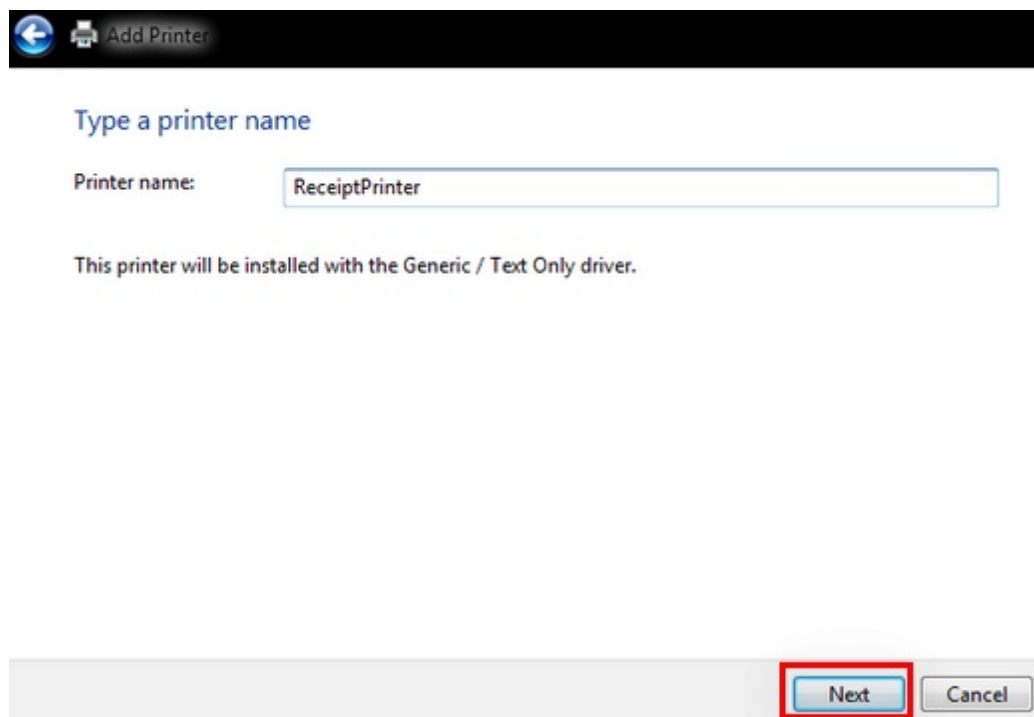
**Printer Port Selection**

5. Select the Generic / Text Only printer driver and click **Next**.



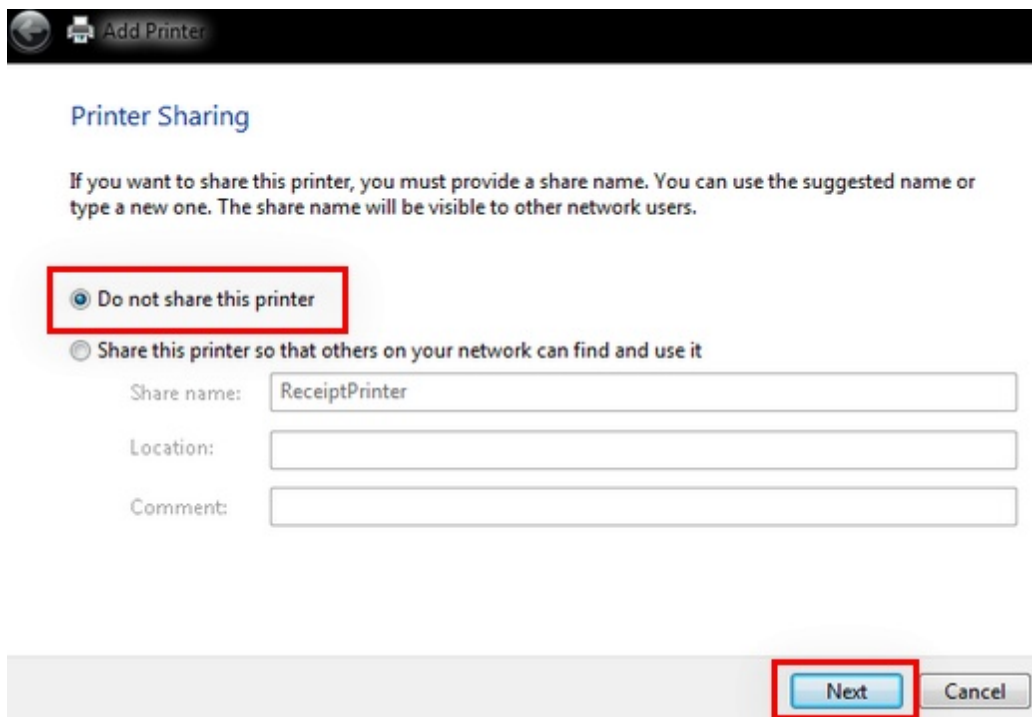
Generic / Text Only Driver

6. Enter a friendly name for the receipt printer and click **Next** to continue.



Printer Name

7. If sharing this printer on the network, specify the share name. Receipt printers are generally not shared unless located at a bar pos station, where the receipt printer may also function as a prep printer. Click **Next** to continue.



**Add Printer**

### Printer Sharing

If you want to share this printer, you must provide a share name. You can use the suggested name or type a new one. The share name will be visible to other network users.

☒ Do not share this printer

☐ Share this printer so that others on your network can find and use it

Share name:

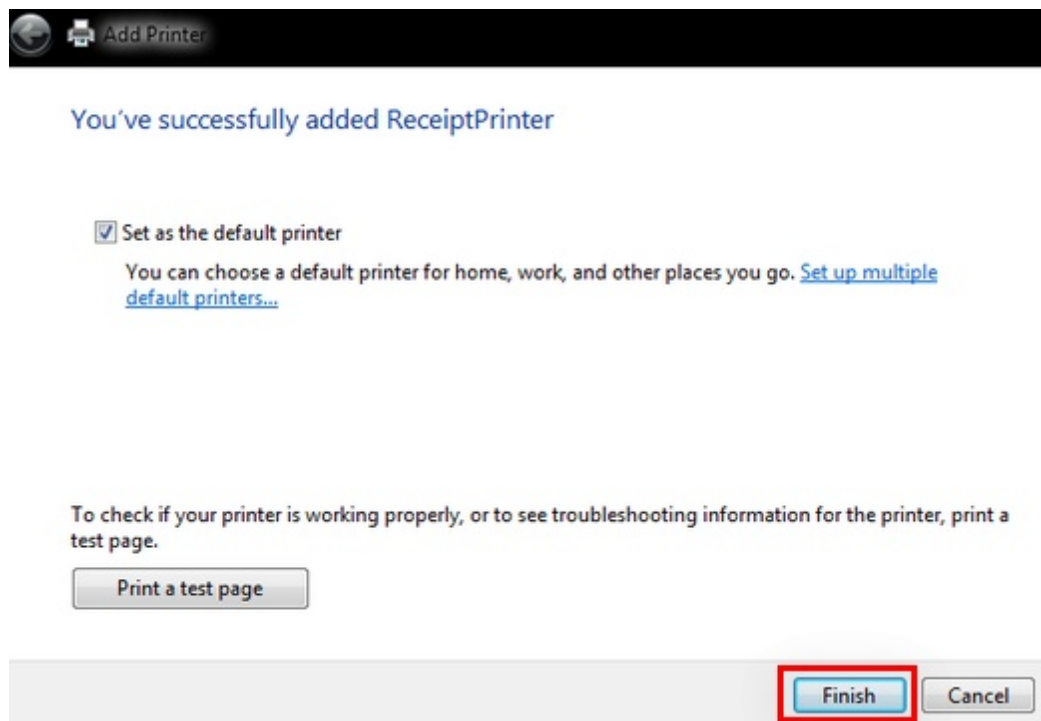
Location:

Comment:

**Next** **Cancel**

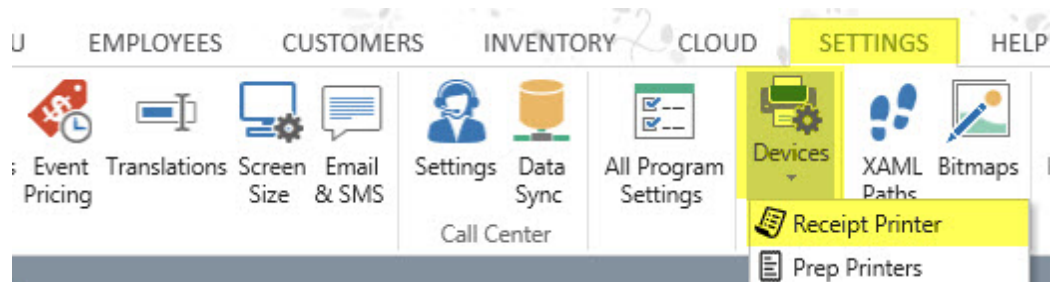
#### Printer Sharing

8. Click **Finish** to complete the Add Printer Wizard. There may be a short delay while the drivers are copied to the system folders.



#### Completing the Add Printer Wizard

9. In AmigoPOS, navigate to Back Office/Settings/Peripherals/ and select the printer name from the drop-down list. Select the appropriate printer type and click the **Test Receipt** button to confirm that the printer is installed correctly.



#### Back Office/Settings/Peripherals

Select the device:  
Receipt Printer

Additional Info:  
Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

Test Receipt

General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Epson (ESC/POS)
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0

**Enable This Device\***  
Set to Yes to enable the device

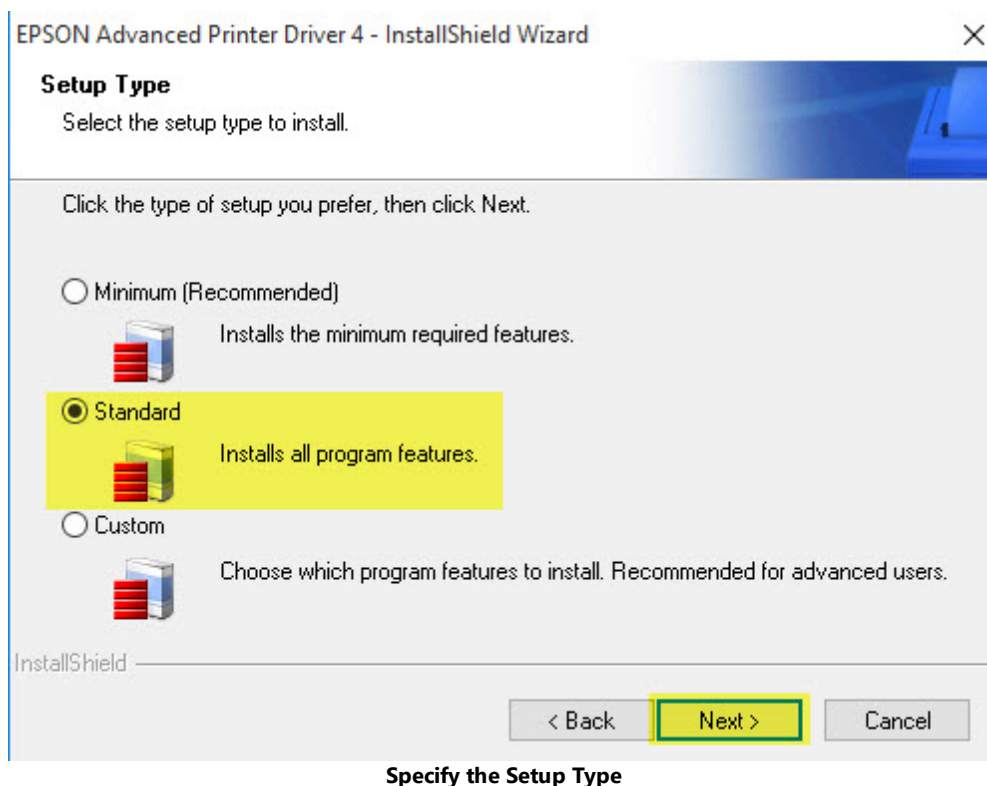
Receipt Printer Configuration

#### 6.12.1.4 Epson TM-T88 USB

Installing an Epson TM-T88 Series USB interface printer requires the Epson Advanced Printer Driver (APD), available at <http://www.epsonexpert.com>. The driver must be installed before connecting the printer. If you inadvertently connect the TM printer to the computer before installing the APD, delete the corresponding port driver and then, without connecting the TM printer, reinstall the printer driver. The following images are taken from APD version 4.56 installation.

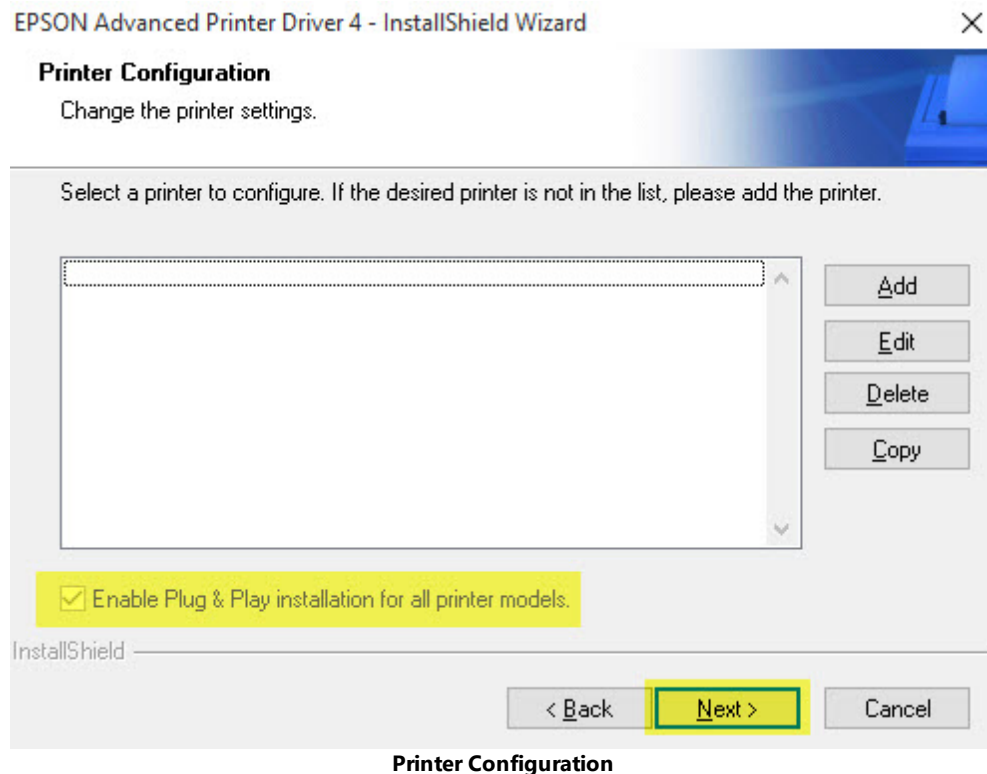
Note: When using a serial, ethernet or parallel port printer, the APD is not required. Install the printer normally using the Windows Add Printer wizard with generic/text only drivers.

1. Disconnect the printer from the pos station
2. Download and unzip the driver installation package from <http://www.epsonexpert.com>. Run the file named APD\_456E.exe. Choose Standard installation when prompted.

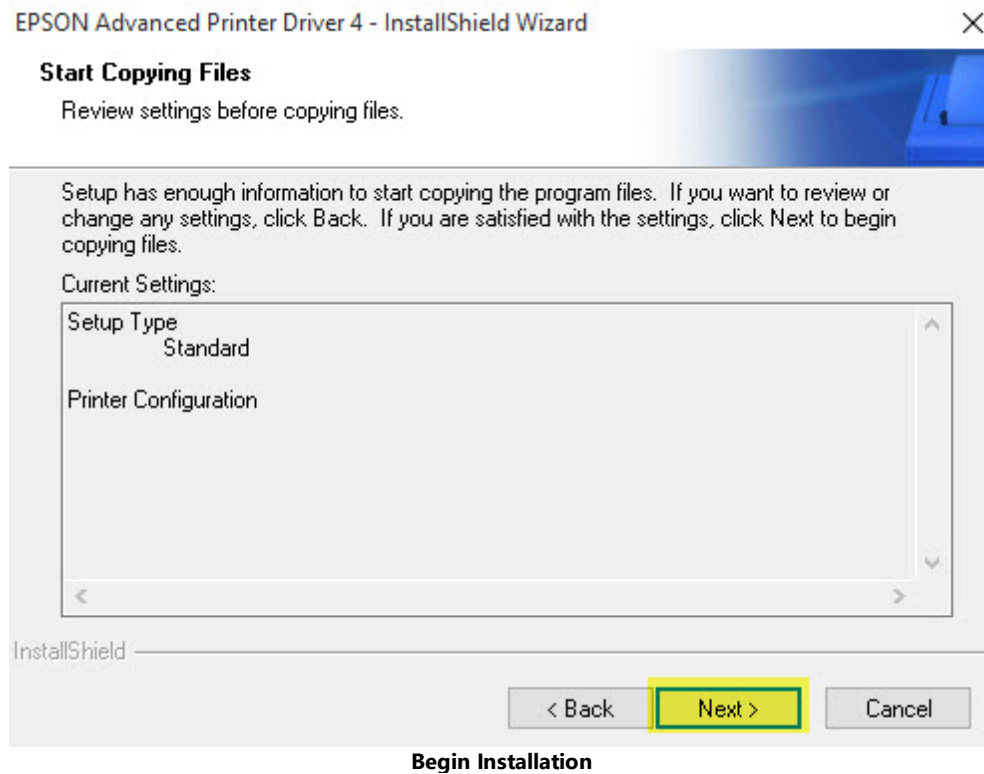


3. Click **Next** on the Printer Configuration screen. The printer will be automatically configured later using Windows Plug & Play.

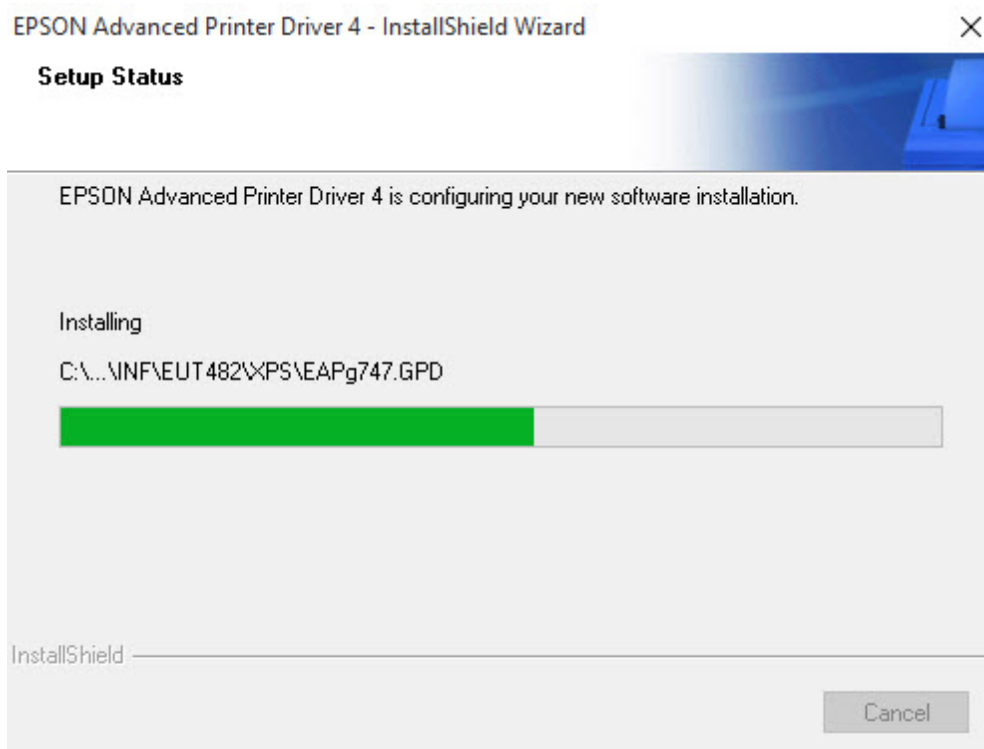




4. Click **Next** to begin the installation.

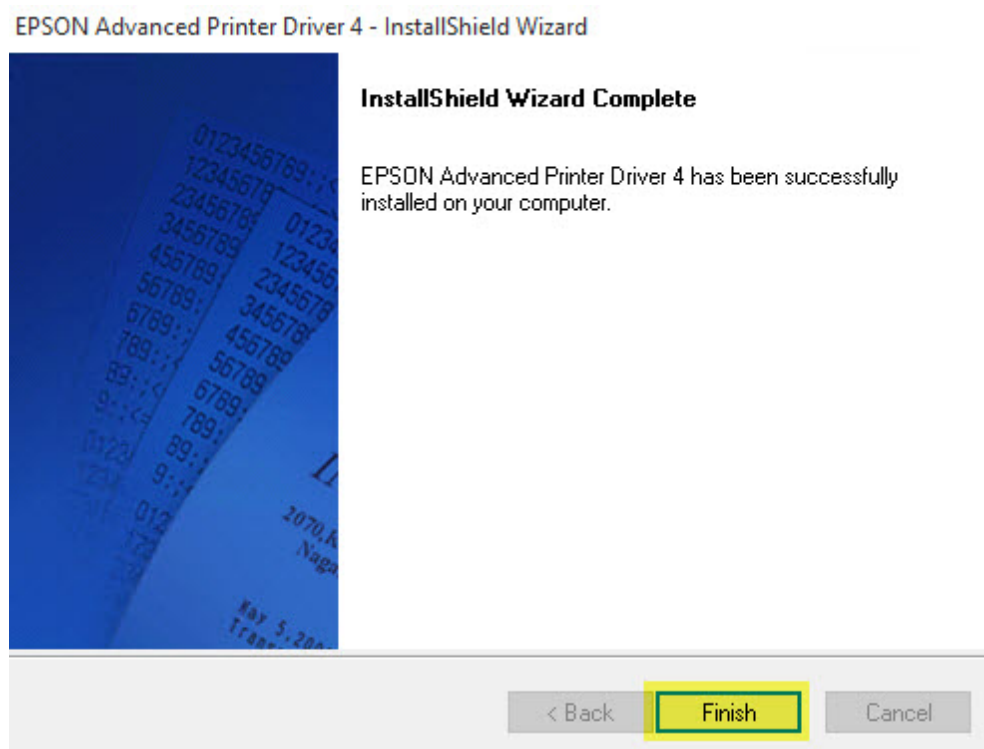


5. The installation will take approximately 5 minutes. Do not interrupt the process or use other programs while the installer is running.



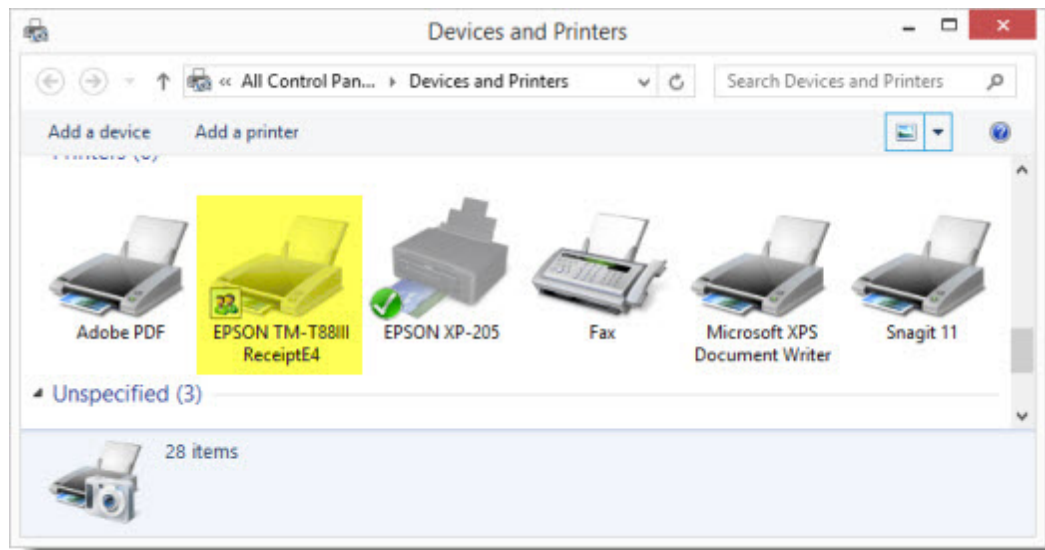
Installation Progress

6. Click **Finish** to exit the installer.



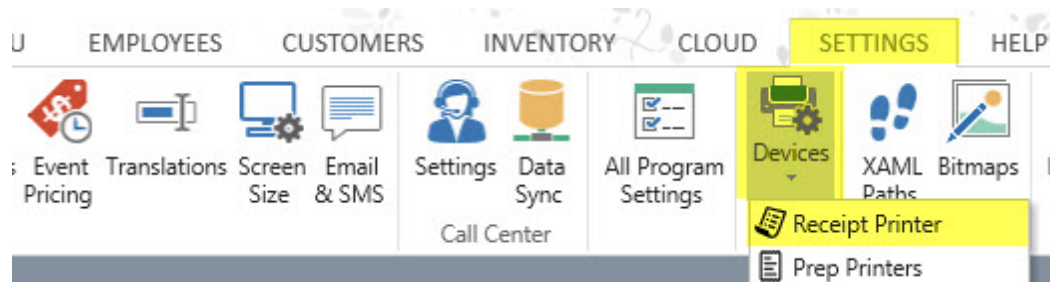
Installation Results

7. Connect the printer to a free USB port on the POS station and power on the printer. The Windows **Found New Hardware** prompt will appear on the taskbar near the clock. After a few moments, the new printer is automatically added to the Devices and Printers folder.



**Windows 8 Devices and Printers Folder**


8. In AmigoPOS, navigate to Back Office/Settings/Peripherals/ and select the printer name from the drop-down list. Select the Epson printer type and click the **Test Receipt** button to confirm that the printer is installed correctly.




**Back Office/Settings/Peripherals**

Select the device:  
**Receipt Printer**

Additional Info:  
 Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

 **Receipt Printer**

 **Test Receipt**

**General Settings**

Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Epson (ESC/POS)
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0

**Enable This Device\***  
 Set to Yes to enable the device

Receipt Printer Configuration

#### 6.12.1.5 Epson TM-T20 USB

The Epson TM-T20 USB printer requires a slightly different installation procedure with a different driver than the TM-T88. Complete the steps below to install a new TM-T88II receipt printer. Do not connect the power to the printer or attach the USB cable until prompted to do so in step 7. [Steps 9-16](#) describe the process to upload a bitmap logo to the printer and to set the key-code non use mode.

1. Download and run the installer from <https://download.epson-biz.com/modules/pos/index.php?page=prod&pcat=38&pid=37>

**EPSON** EXCEED YOUR VISION

POS DISCPRODUCER DOT MATRIX COLORWORKS

DOWNLOAD TECH REFERENCE TM-INTELLIGENT

Members and Epson Partners ID Password If you have forgotten your password **LOGIN**

TOP > POS > DOWNLOAD > THERMAL LINE PRINTER > TM-T20 - Software & Document

**DOWNLOAD**

**PRODUCTS**

- TM-Intelligent Printer
- Thermal line Printer**
  - Label Printer (Label, Ticket etc.)
  - Impact Dot Matrix Printer
  - Slip Printer
  - Hybrid Printer
  - Mobile Printer
  - Inkjet Printer
  - Fiscal Printer
  - Image Scanner
  - Customer Display
  - POS Terminal

**TM-T20** **Product**

**Software**

**Windows Printer Driver**

Patch program for privilege escalation vulnerability of EPSON Network Utility Ver.1.0.1.0 **Download page**

**EPSON Advanced Printer Driver for TM-T20 Ver.5.04E** **Download page**

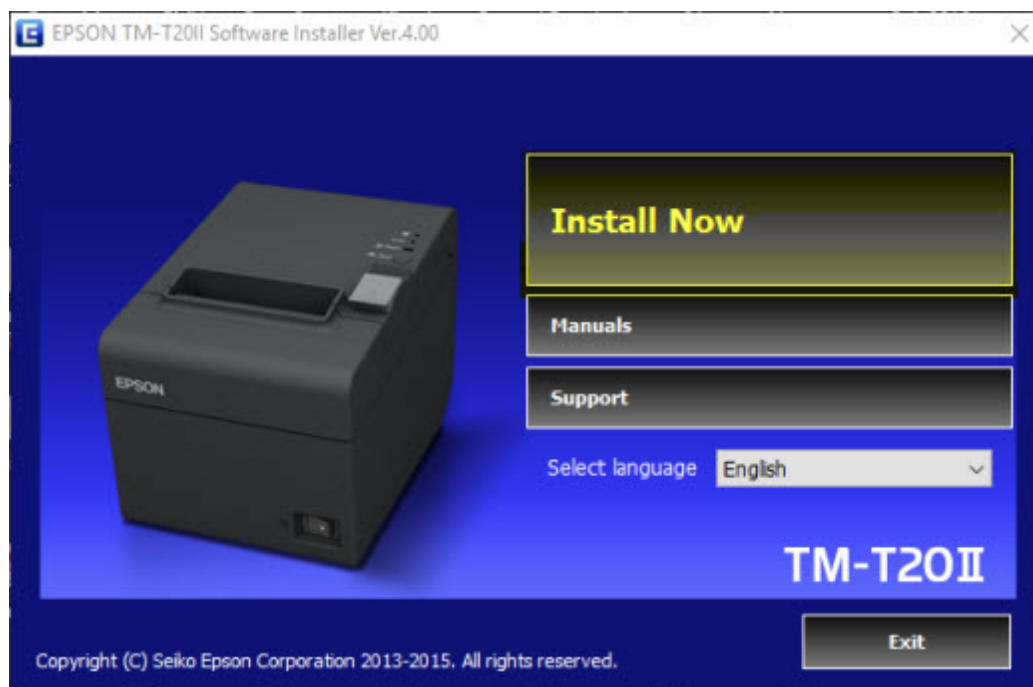
EPSON Advanced Printer Driver (for English model) Ver.4.56E **Download page**

EPSON Advanced Printer Driver Delete Temp Tool Ver.1.00 **Download page**

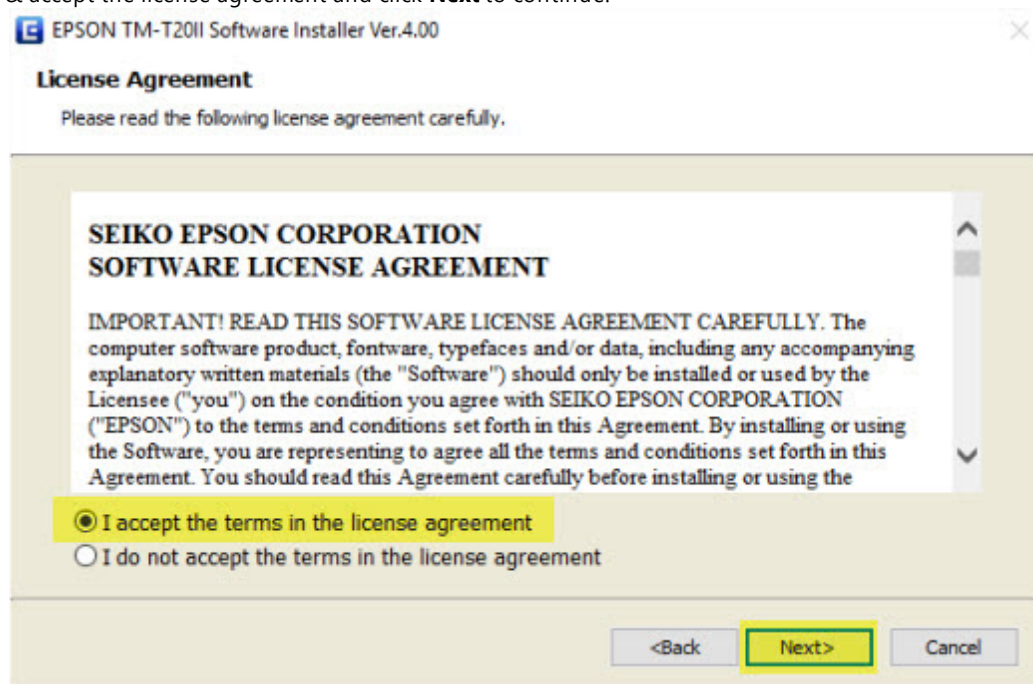
EPSON Advanced Printer Driver Update Tool **Download page**

**Linux Printer Driver**

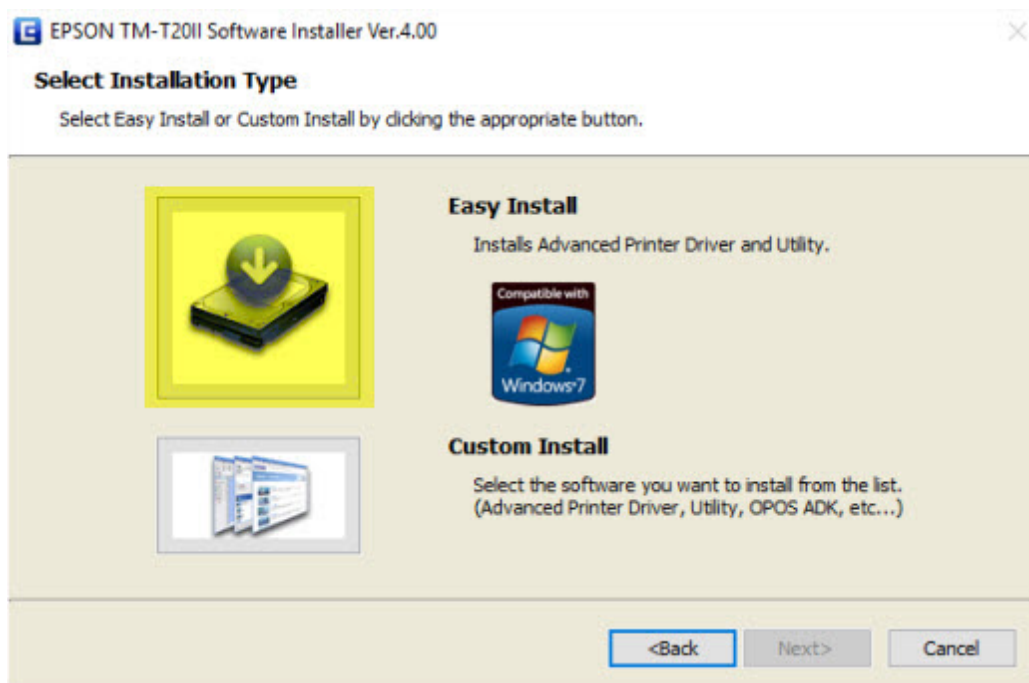
2. Click **Install Now**.



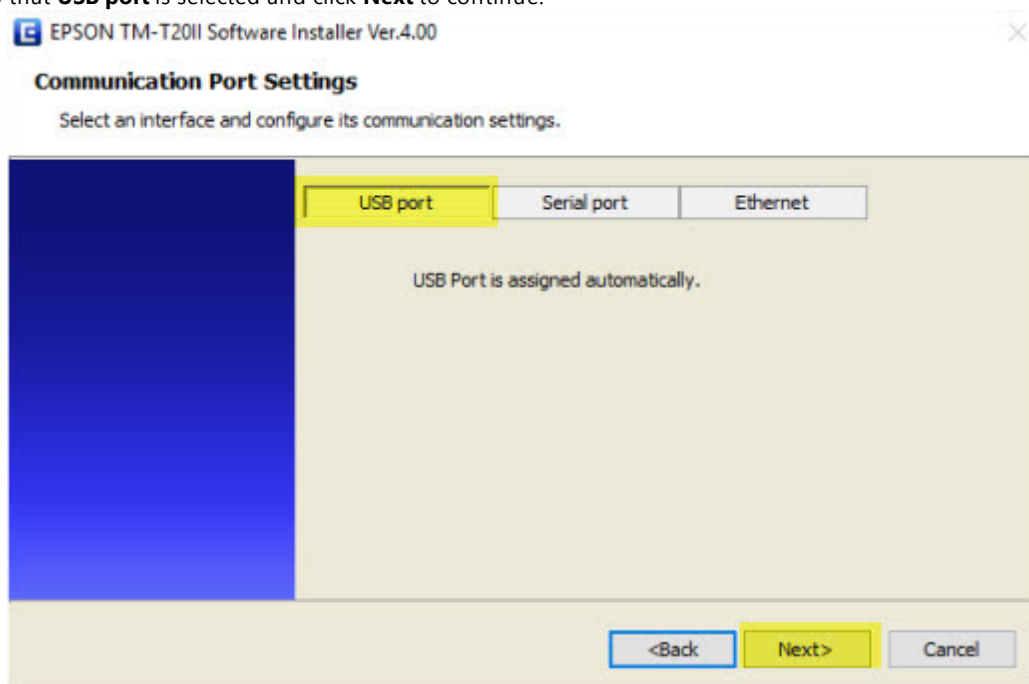
3. Read & accept the license agreement and click **Next** to continue.



4. Select **Easy Install**.

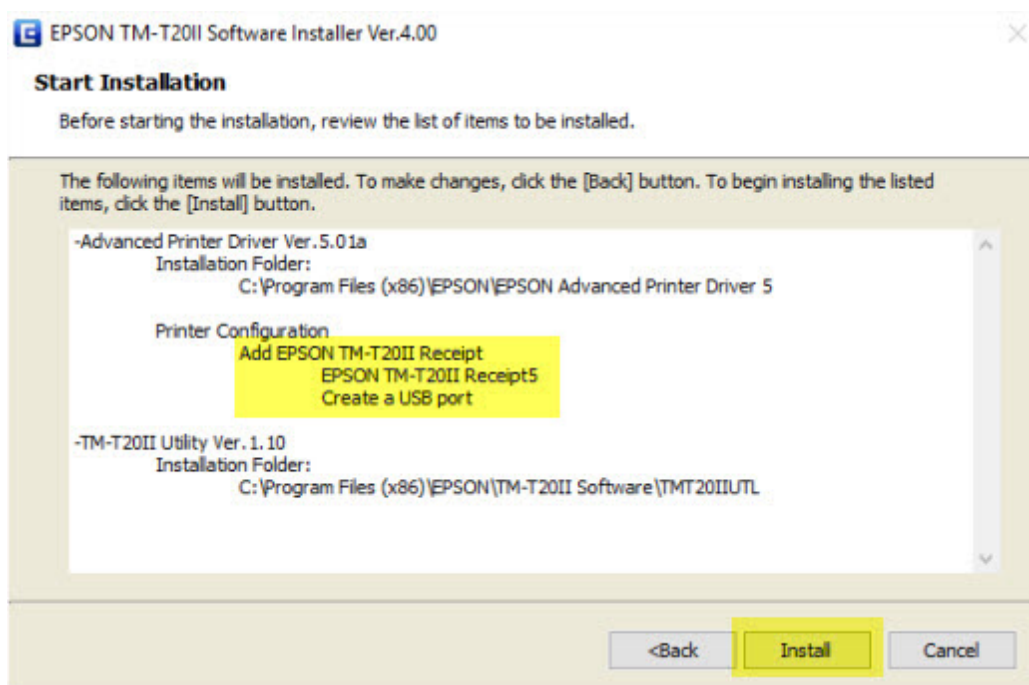


5. Verify that **USB port** is selected and click **Next** to continue.

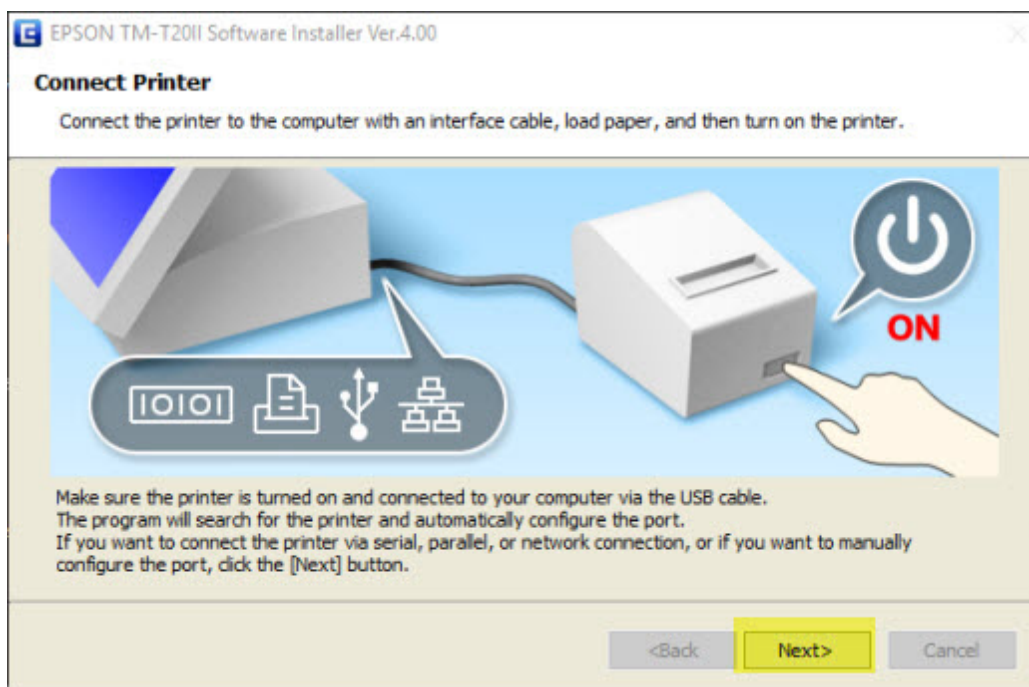


6. Click Install to **install** the driver.



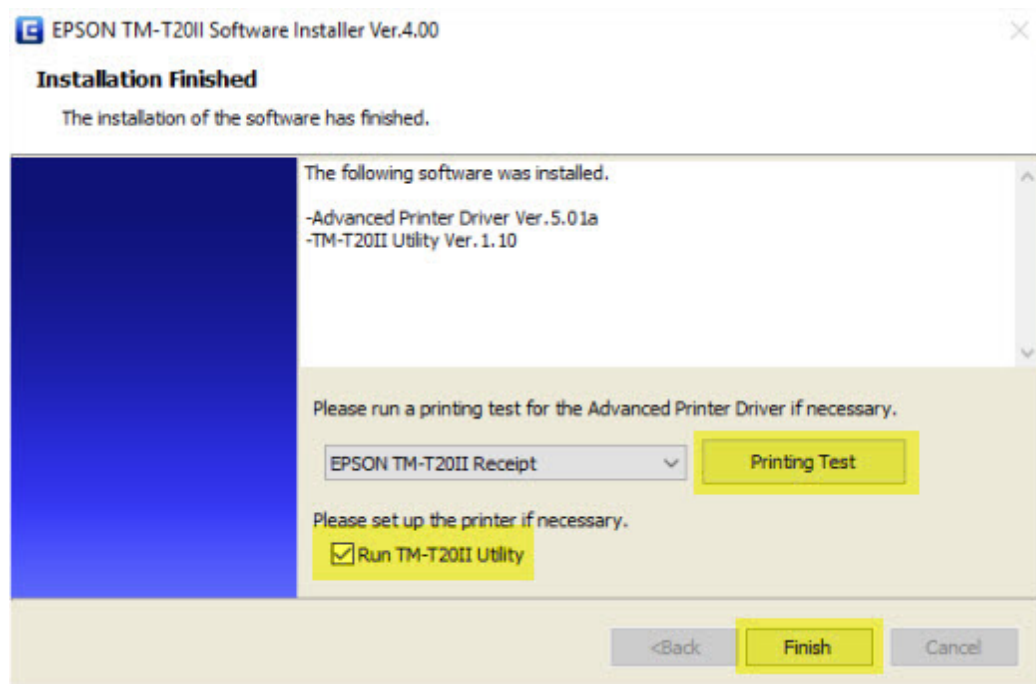


7. Connect the power supply and attach the USB cable. Click **Next** and Windows will automatically detect and install the printer.



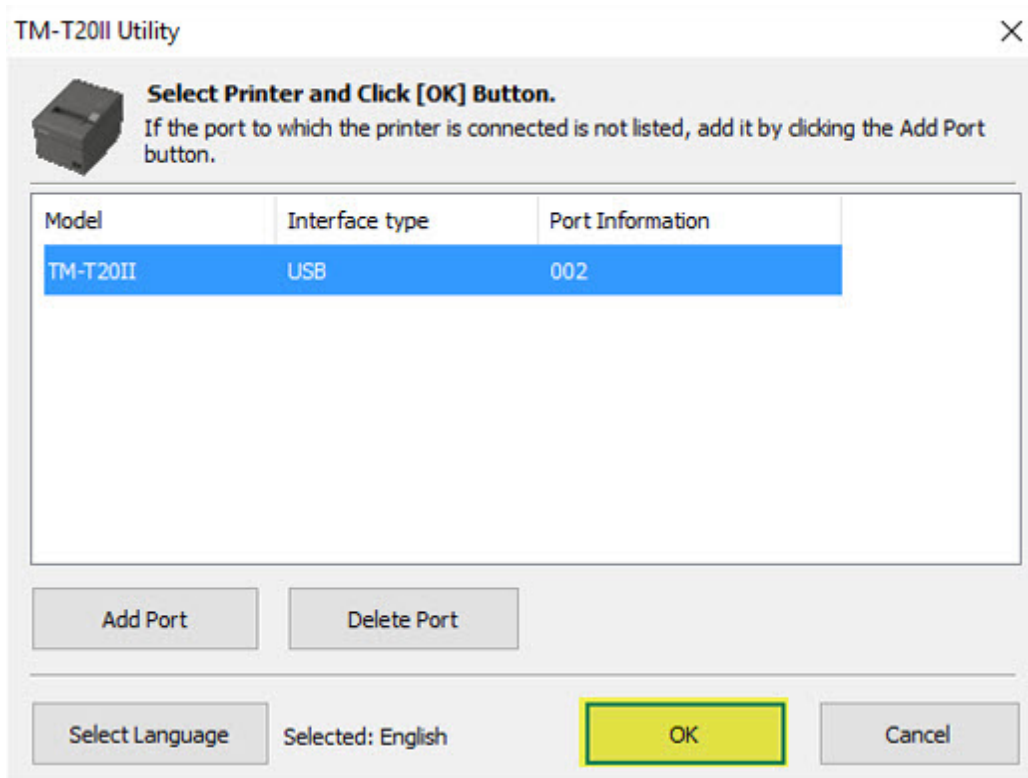
8. Click **Printing Test** to verify that the installation is successful, check the box to run the TM-T20II Utility if a printer logo is required and click **Finish**.



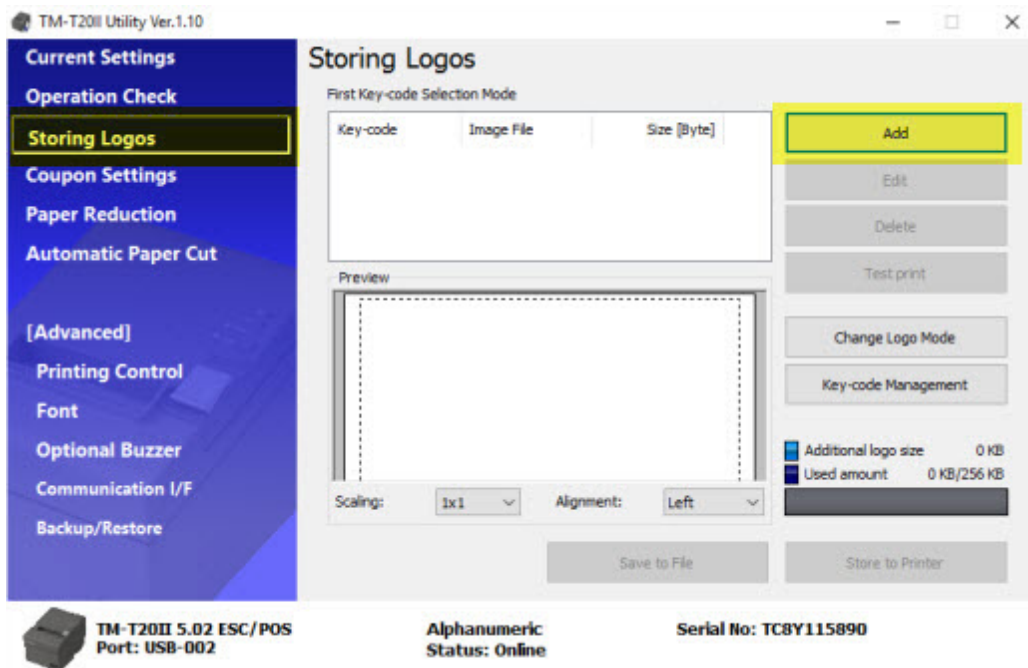


**Skip steps 9-16 if a printer logo is not required.**

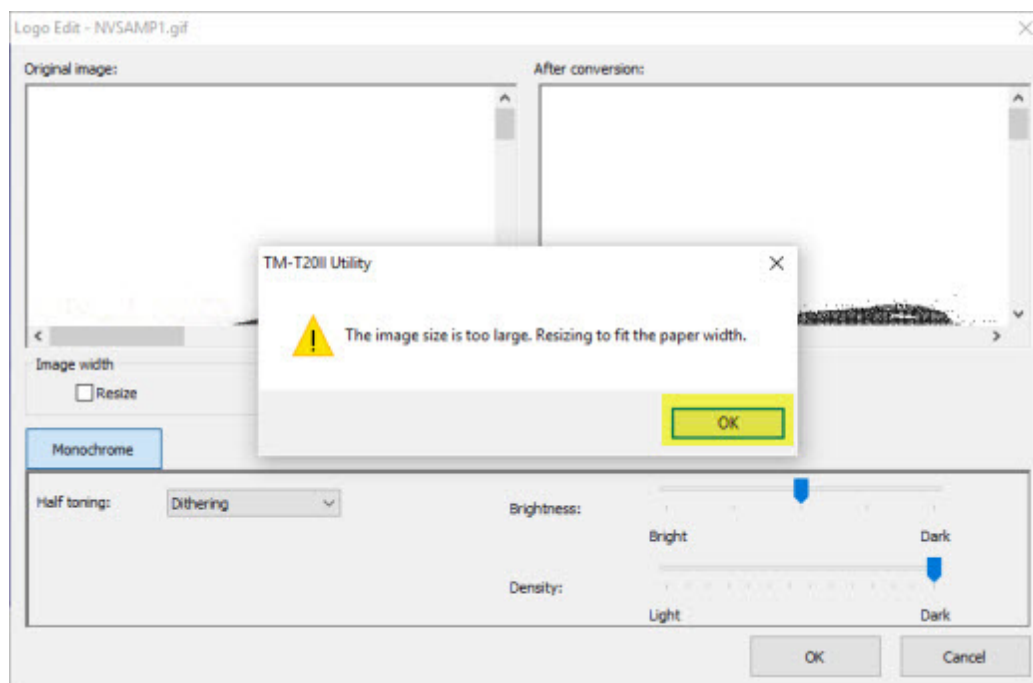
9. Verify that the correct language is selected and click **OK**.



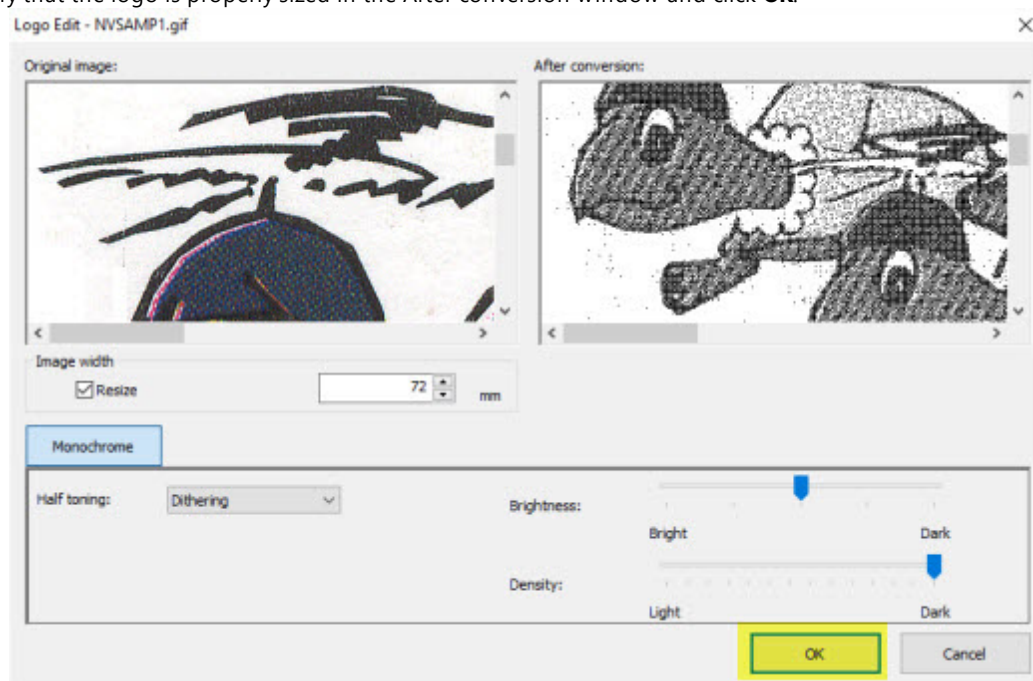
10. Select **Storing Logos** at the left and click Add to open the file chooser. Select the logo file.



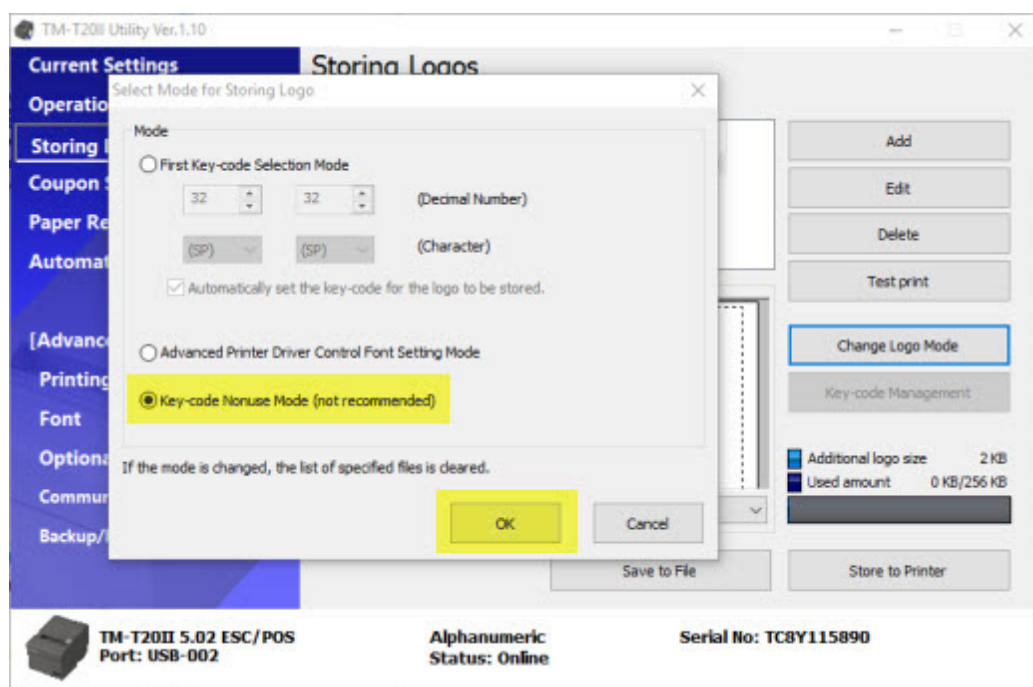
11. The logo is automatically opened in the editor so that the size and color settings can be adjusted, if necessary.



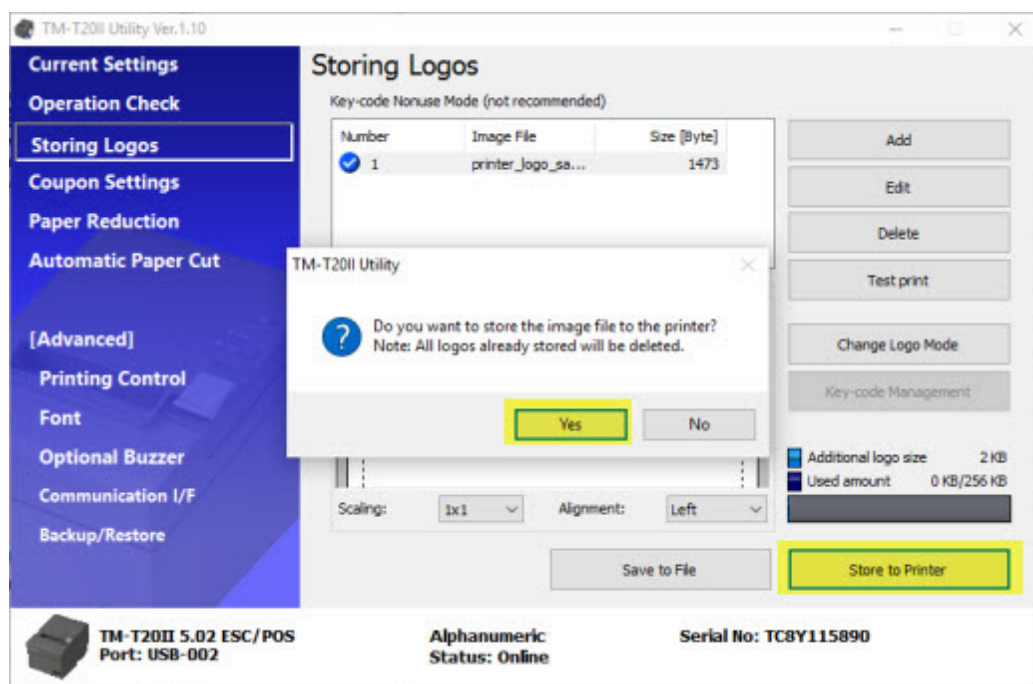
12. Verify that the logo is properly sized in the After conversion window and click **OK**.



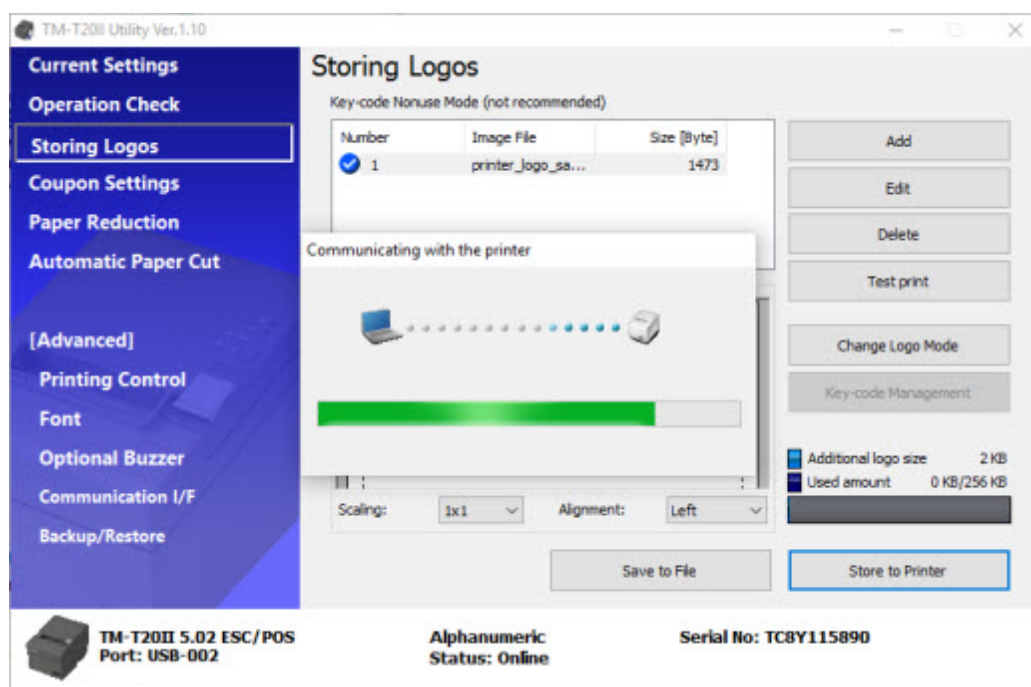
13. Click **Change Logo Mode**, select **Key-code Nonuse Mode** and click **OK**.



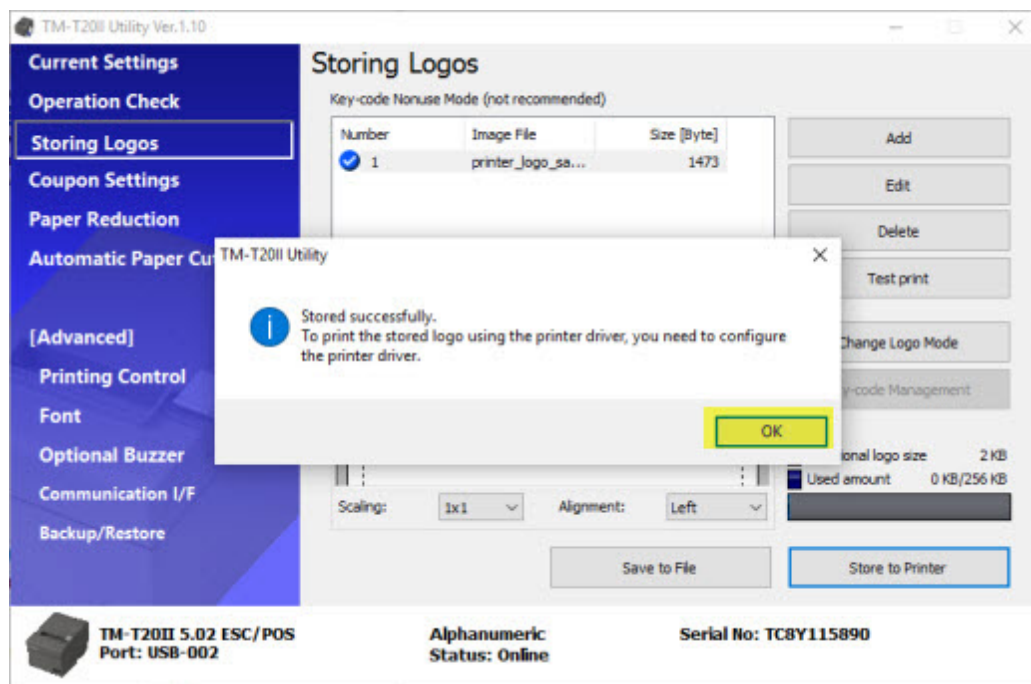
14. Click **Store to Printer** and **Yes** to confirm to upload the logo to the printer.



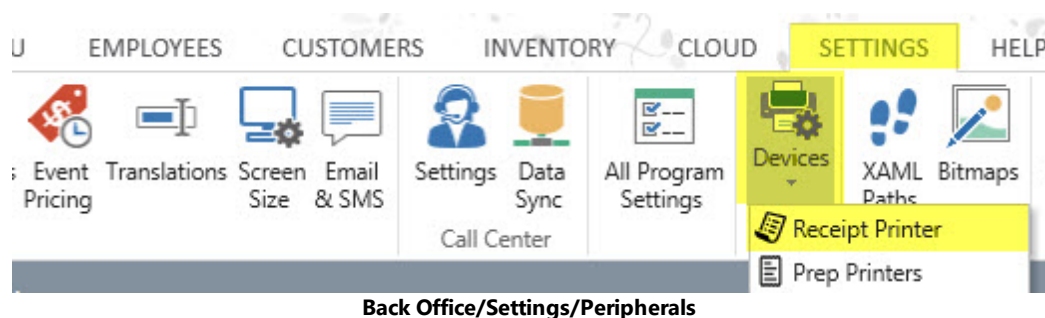
15. Uploading the logo to the printer's memory may take up to a minute depending on the logo size.



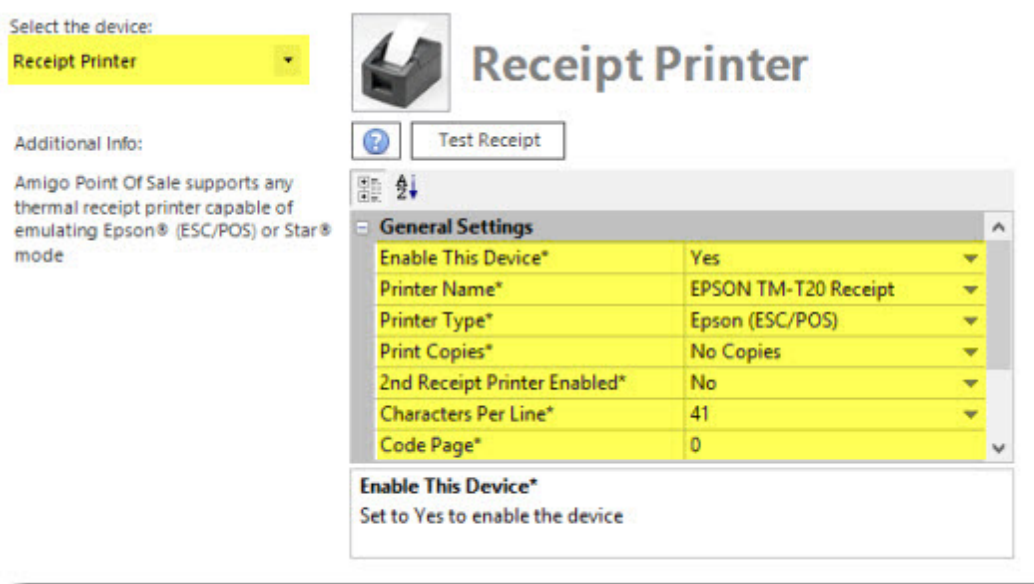
16. A message appears confirming that the logo has been uploaded successfully.



17. Open **Back Office>Settings>Peripherals>Receipt Printer**, select the **TM-T20II Receipt** printer from the drop-down list, set the printer type to **Epson (ESC/POS)** and print a test receipt to verify that the receipt is printed correctly.



Back Office/Settings/Peripherals



Receipt Printer Configuration

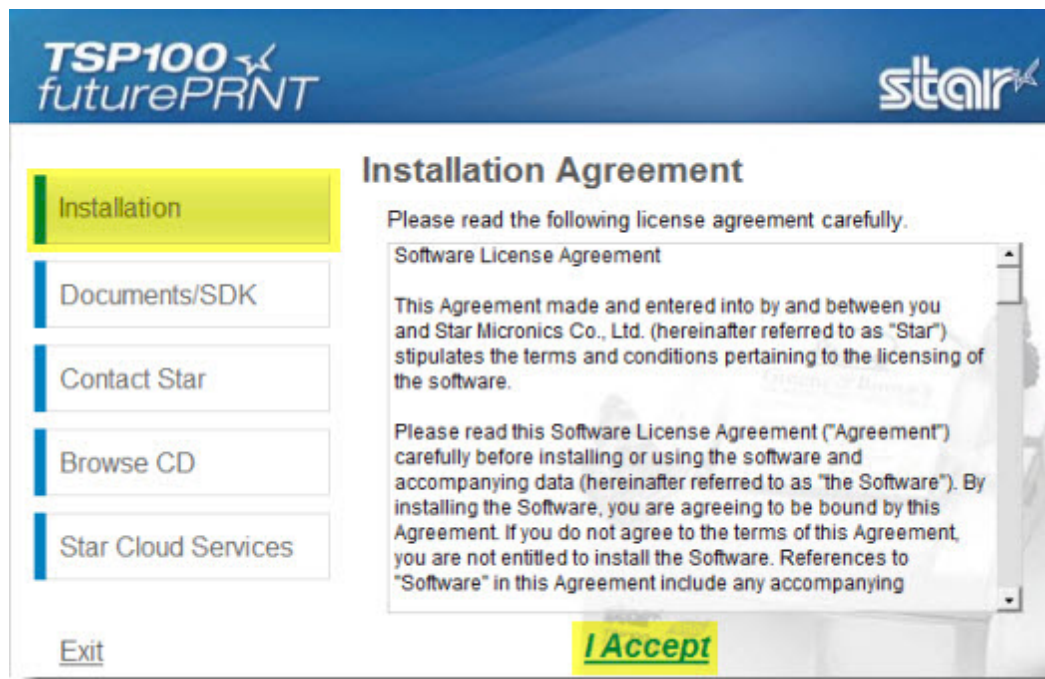
#### 6.12.1.6 Star TSP100 USB

Installing a Star TSP100 USB interface printer requires the driver installation package supplied on CD with new Star printers or available for download at <http://www.starmicronics.com>. Do not connect the printer until after the drivers have been installed. The following images are taken from driver version 6.2 light. The light version is a smaller package that does not include documentation.

Note: When using a serial, Ethernet or parallel port printer, the Star drivers are not required. Install the printer normally using the Windows Add Printer wizard with generic/text only drivers.

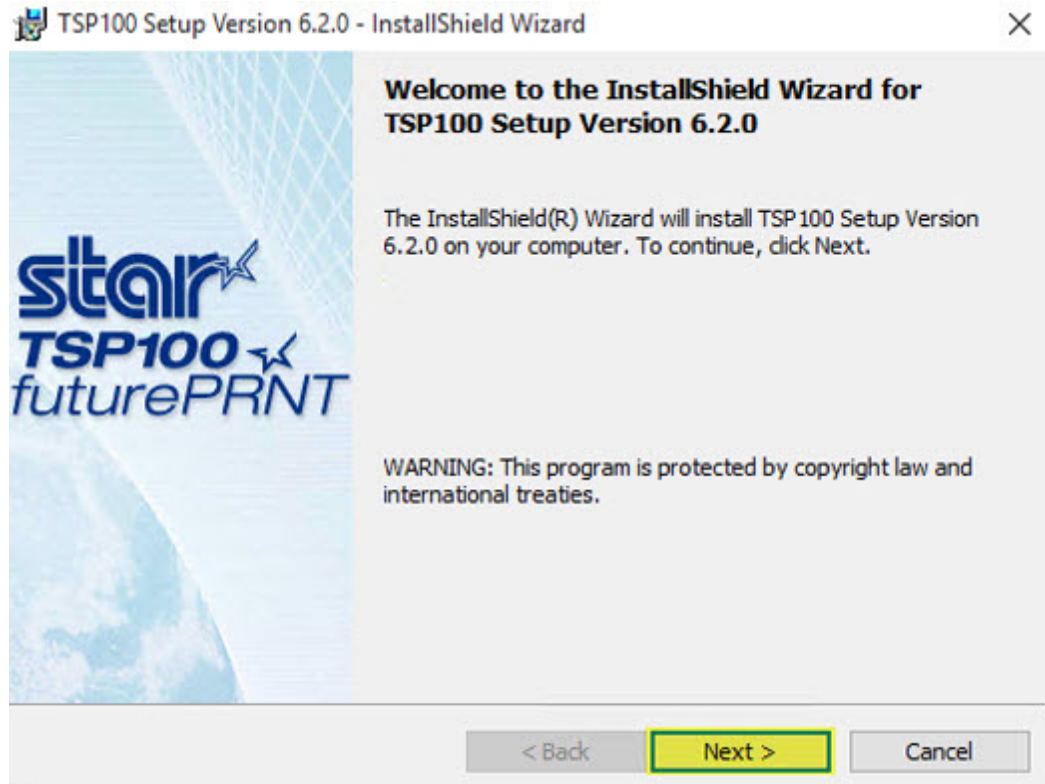
1. Insert the CD that came with the printer or download and unzip the driver installation package from <http://www.starmicronics.com>. Allow the disk to auto run or double-click on **autorun.exe**. Click **Install Now** and review the License Agreement. Click **I Accept** if you have read and agree with the License Agreement.





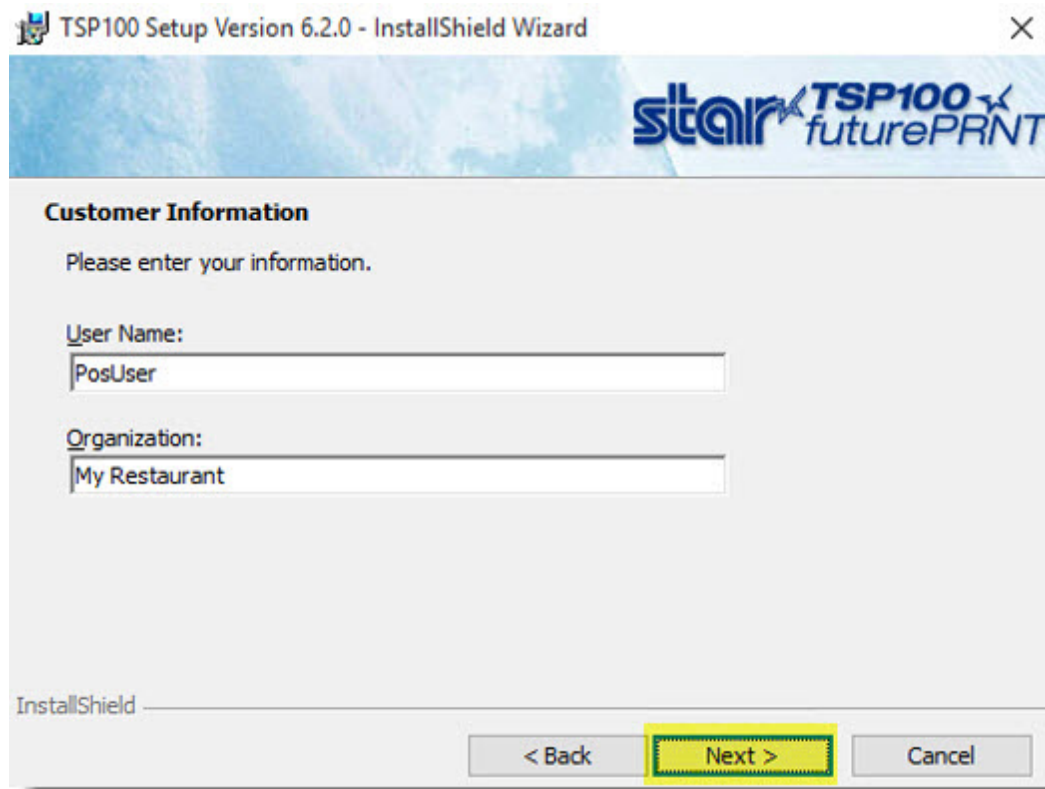
Accept the License Agreement

2. Click **Next** on the welcome screen.



Setup Welcome Dialog

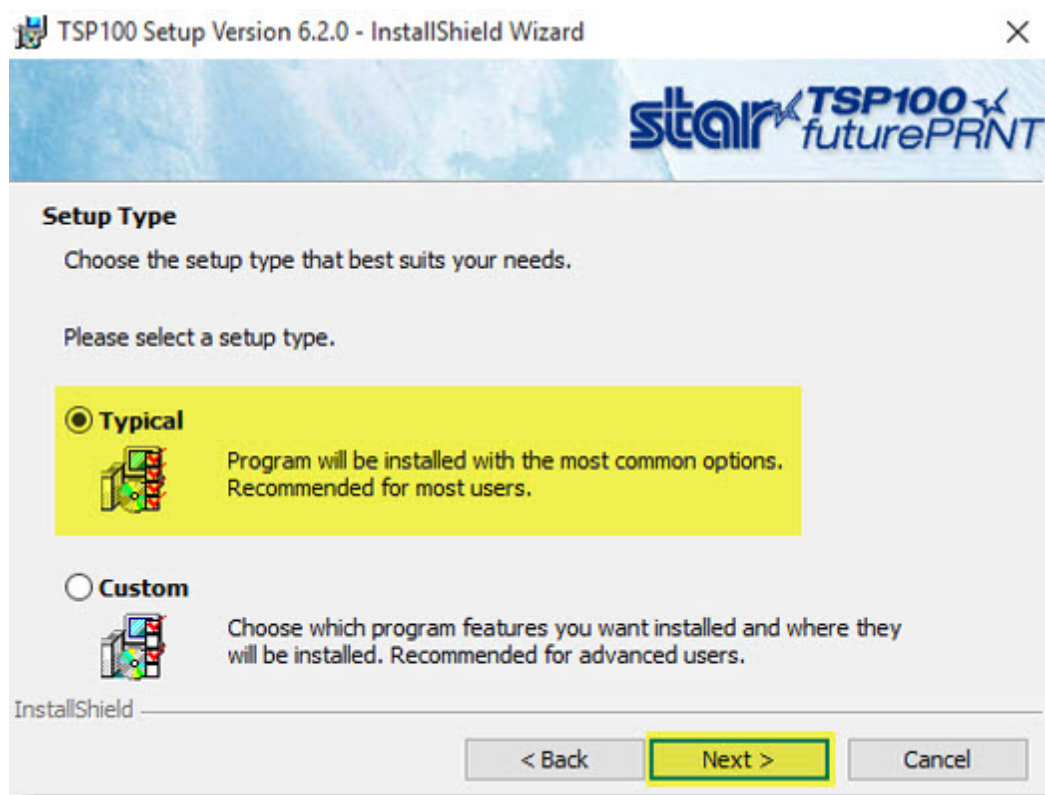
3. Review the customer information and the scope of the installation. Click **Next**.



#### Customer Information

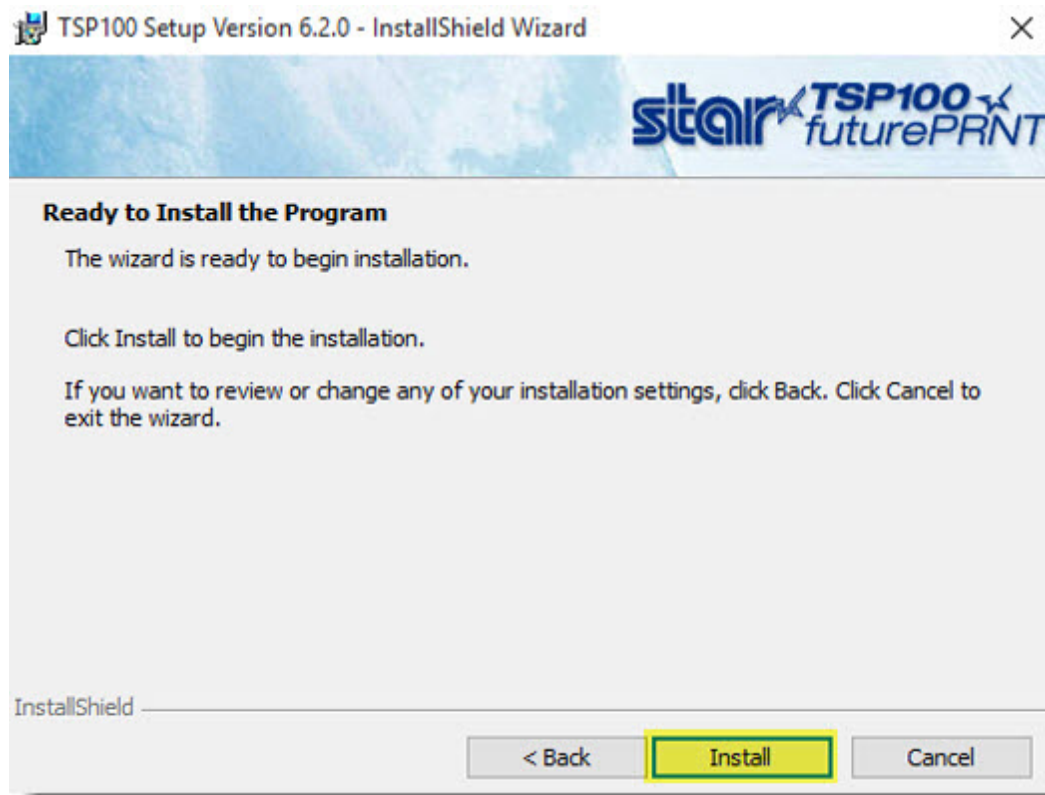
4. Select **Typical** setup type and click **Next**.





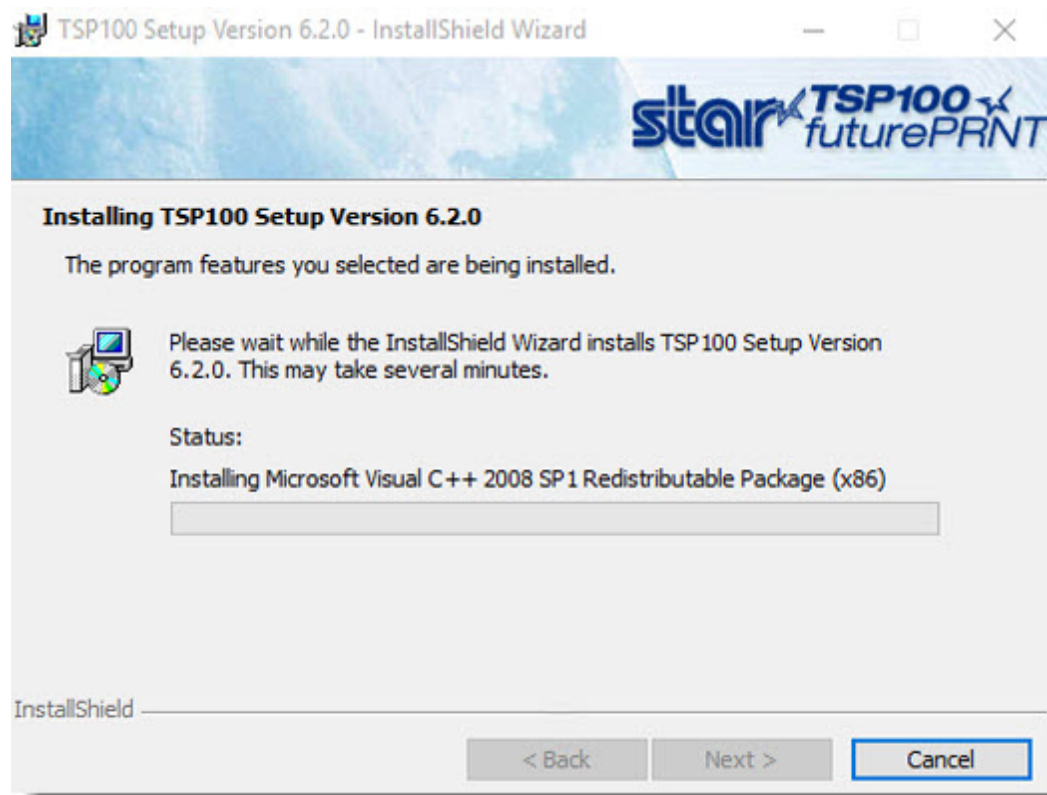
#### Specify the Setup Type

5. Click **Install** to begin the installation.



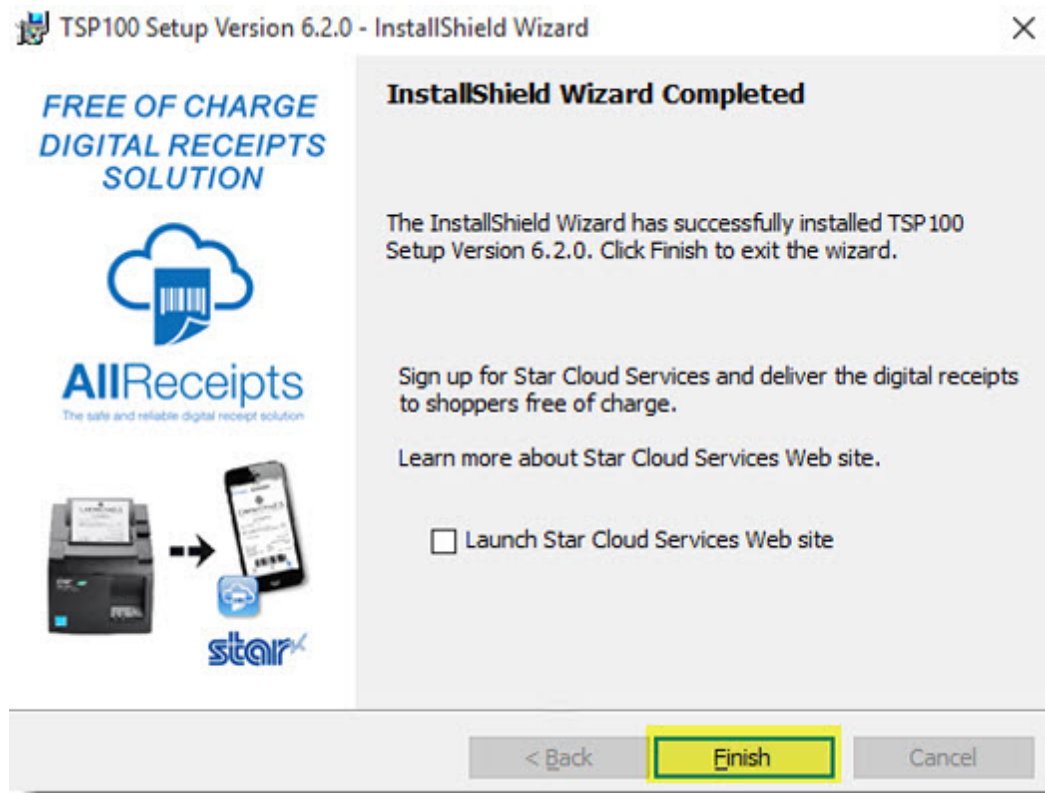
#### Begin Installation

6. The installation will take approximately 2 minutes. Do not interrupt the process or use other programs while the installer is running.



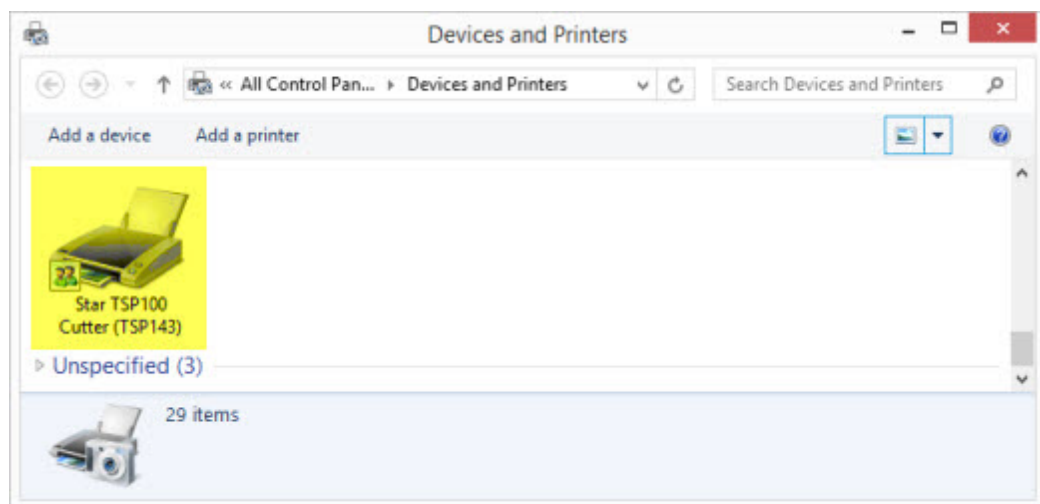
#### Installation Progress

7. Click **Finish** to exit the installer.



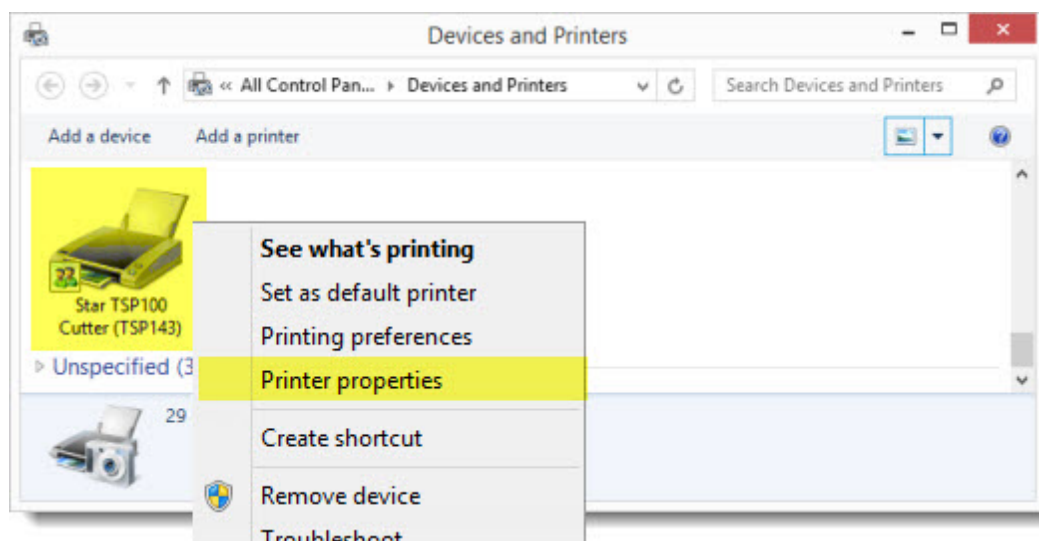
#### Installation Results

8. Connect the printer to a free USB port on the POS station and power on the printer. The Windows **Found New Hardware** prompt will appear on the taskbar near the clock. After the device is installed, open the Windows Devices and Printers folder to confirm that the new printer has been installed and is on-line.



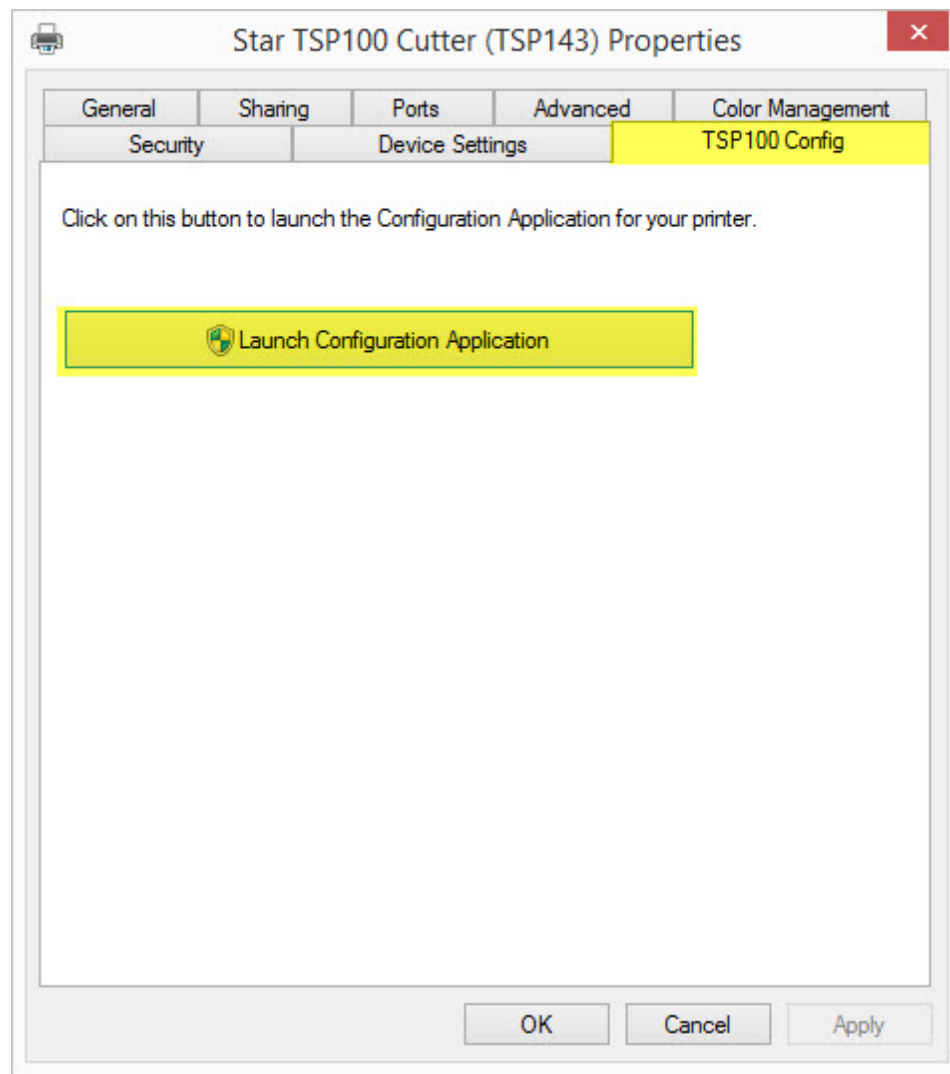
#### Windows 8 Devices and Printers Folder

9. AmigoPOS can send commands to the Star TSP100 in either the Star or ESC/POS (Epson) command set. There are slight differences in the receipt output. To use the ESC/POS command set with the TSP100, open the Windows Devices and Printers folder and right-click on the Star TSP100 Cutter (TSP143).



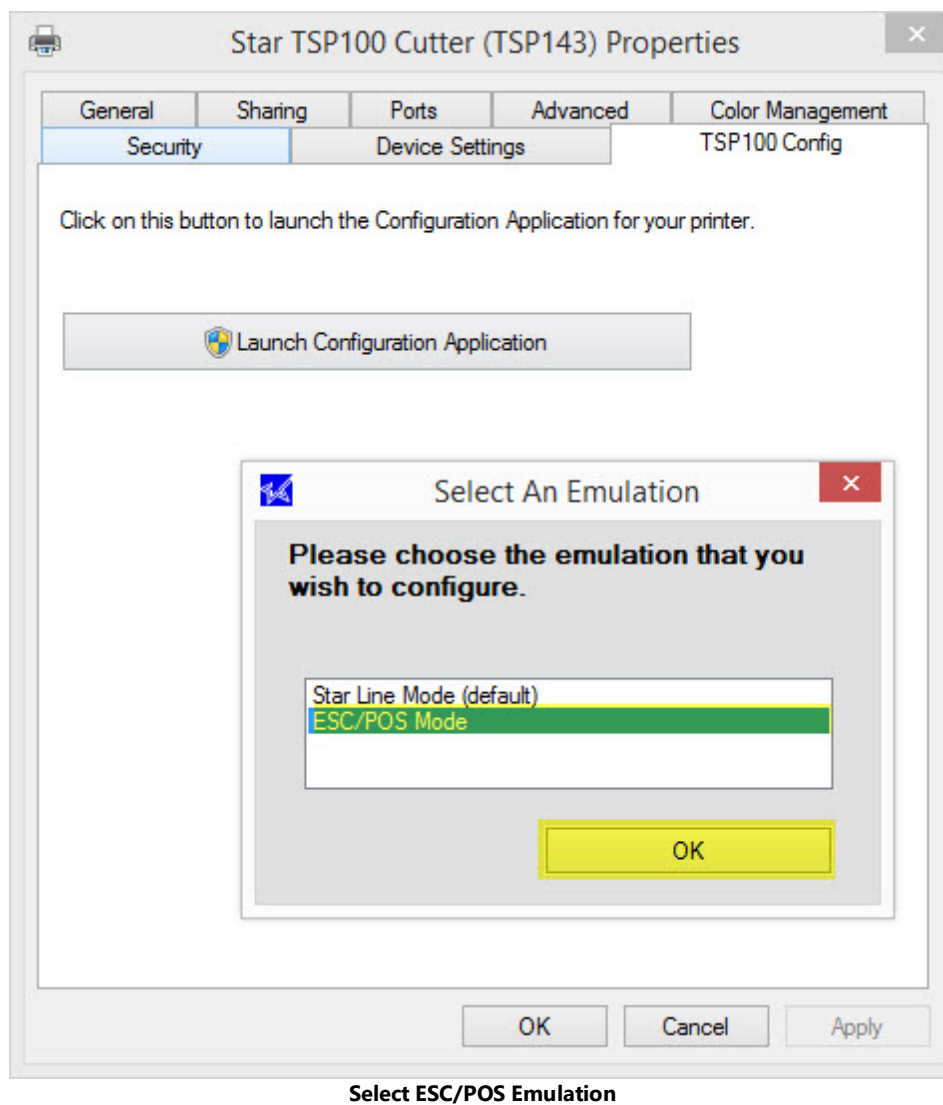
**Devices and Printers Folder**

10. Click **Properties** and select the **TSP Config** tab followed by **Launch Configuration Application**.

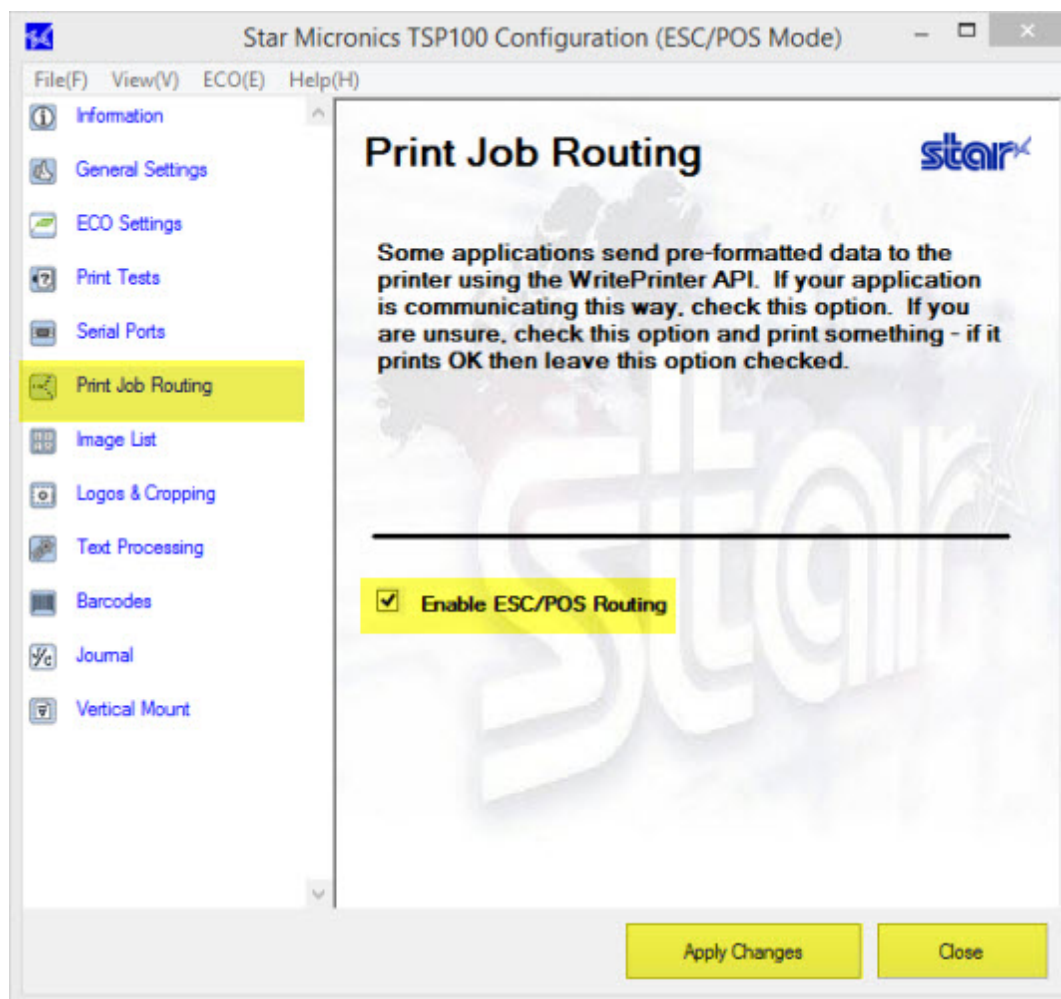


Printer Properties Dialog

11. Select **ESC/POS Mode** and click **OK**.

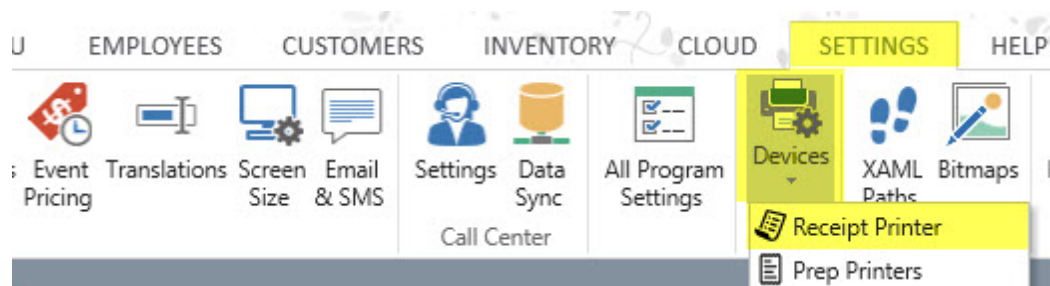


12. Click **Print Job Routing** and check the box next to **Enable ESC/POS Routing**. Click **Apply Changes** and **Close**.



Print Job Routing

13. In AmigoPOS, navigate to Back Office/Settings/Peripherals/ and select the printer name from the drop-down list. Select the appropriate printer type and click the **Test Receipt** button to confirm that the printer is installed correctly.



Back Office/Settings/Peripherals



Select the device:  
Receipt Printer

Additional Info:  
Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

Test Receipt

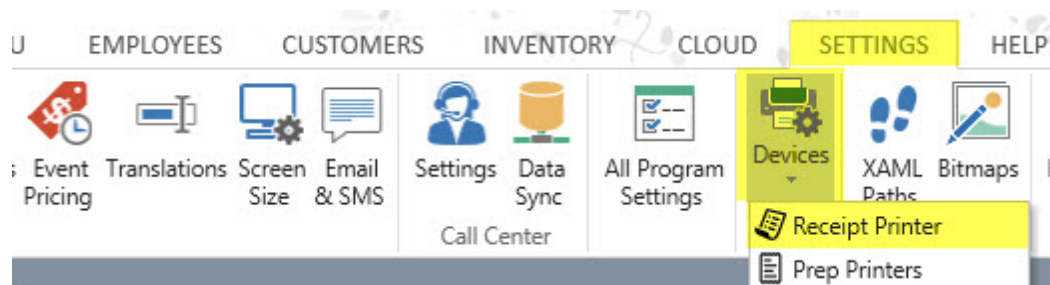
General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Epson (ESC/POS)
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0

Enable This Device\*  
Set to Yes to enable the device

Receipt Printer Configuration

## 6.12.2 Receipt Format Settings

In back office, navigate to Back Office/Settings/Peripherals/ and select Receipt Printer from the drop-down list.



Settings are organized as follows:


- [Local Settings](#)<sup>[234]</sup>
- [Custom Text](#)<sup>[235]</sup>
- [Suggested Gratuities](#)<sup>[237]</sup>
- [Receipt Settings](#)<sup>[238]</sup>
- [Order Type Specific Settings](#)<sup>[239]</sup>



### Local Settings (must be set at each pos station)



Select the printer name from the drop-down list, select the appropriate printer type and click the **Test Receipt** button to confirm that the printer is installed correctly. AmigoPOS can automatically print additional copies if required. Set the value of **Print Copies** to the number of copies required. Set to **No Copies** to print only one receipt. This value must be configured on each pos station independently.

Select the device:  
**Receipt Printer**

Additional Info:  
 Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

 **Receipt Printer**

General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Epson (ESC/POS)
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0

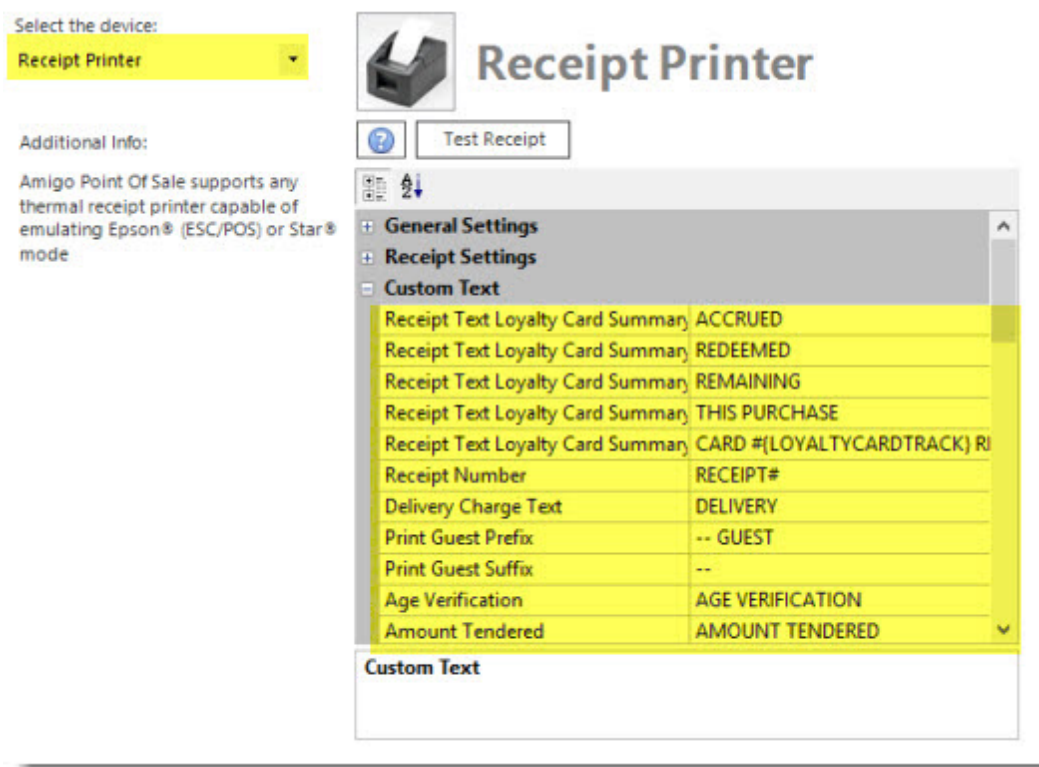
**Enable This Device\***  
 Set to Yes to enable the device

#### Receipt Printer Configuration

- **Enable This Device\*:** Set to Yes to enable the receipt printer at the local pos station
- **Printer Name\*:** Select the Windows printer name from the drop-down list
- **Printer Type\*:** Select Epson® (ESC/POS) or Star® mode emulation
- **Print Copies\*:** Select the number of copies to print (in addition to the original customer receipt)
- **2nd Receipt Printer Enabled\*:** Set to Yes to print a duplicate customer receipt to a [second receipt printer](#)<sup>24</sup>. The printer must be the same type, i.e. Epson (ESC/POS) or Star, as the primary receipt printer. Cash drawers connected to the second receipt printer are not supported.
- **Characters Per line\*:** For non-standard printers, specify the number of characters per line (default is 41)

#### Custom Text

Most receipt text can be customized by changing the text values under the **Custom Text** heading. Note that most phrases should be kept short so that the receipt prints properly.



### Custom Text Settings

- **Receipt Number:** Text to print on customer receipt next to ticket number at the bottom of the ticket (visible only when a barcode is not printed)
- **Delivery Charge Text:** Text to print on customer receipt for delivery charge
- **Print Guest Prefix:** When ticket details are grouped by guest, print this before the guest number, for example the red text in the phrase -- Guest 1 --
- **Print Guest Suffix:** When ticket details are grouped by guest, print this after the guest number, for example the red text in the phrase -- Guest 1 --
- **Amount Tendered:** Text to print on customer receipt for amount tendered
- **Bottom Line 1:** Text to print on customer receipt if bottom line 1 is enabled
- **Bottom Line 2:** Text to print on customer receipt if bottom line 2 is enabled
- **Bottom Line 3:** Text to print on customer receipt if bottom line 3 is enabled
- **Bottom Line 4:** Text to print on customer receipt if bottom line 4 is enabled
- **Bottom Line 5:** Text to print on customer receipt if bottom line 5 is enabled
- **Change Due:** Text to print on customer receipt for change due
- **Customer Copy:** Text to print on customer receipt when indicating that the receipt is a customer copy
- **Customer Information:** Text to print on customer receipt above the customer name and address
- **Foreign Currency:** Text to print on customer receipt above foreign currency conversion
- **Guest:** Text to print on customer receipt when displaying the number of guests on the customer receipt (1 Guest)
- **Guests:** Text to print on customer receipt when displaying the table number on the customer receipt (more than 1 Guest)
- **Item Count:** Text to print on customer receipt for total number of items
- **Mandatory Gratuity:** Text to print on customer receipt when a mandatory gratuity is added to a ticket
- **Order Number:** Text to print on customer receipt above the large order number at the bottom of the ticket
- **Pay This Amount:** Text to print on customer receipt for amount to pay
- **Seat:** Text to print on customer receipt for seat
- **Server:** Text to print on customer receipt for server
- **Split:** Text to print above total on split tickets
- **Subtotal:** Text to print on customer receipt for subtotal
- **Table:** Text to print on customer receipt when displaying the table number on the customer receipt
- **Top Line 1:** Text to print on customer receipt if top line 1 is enabled
- **Top Line 2:** Text to print on customer receipt if top line 2 is enabled

- **Top Line 3:** Text to print on customer receipt if top line 3 is enabled
- **Top Line 4:** Text to print on customer receipt if top line 4 is enabled
- **Top Line 5:** Text to print on customer receipt if top line 5 is enabled
- **Total Due:** Text to print on customer receipt for total due (total due appears instead of amount to pay if the ticket is already settled)
- **Transactions:** Text to print on customer receipt for transactions header

### Suggested Gratuities

Up to five suggested gratuities can print automatically at the bottom of the customer receipt by enabling each gratuity and setting a value greater than zero.

Select the device:  
Receipt Printer

Additional Info:  
Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

Receipt Printer

Test Receipt

General Settings

Receipt Settings

Custom Text

Suggested Gratuities

Suggested Gratuities	SUGGESTED GRATUITIES
Suggested Gratuity	% TIP =
Print Suggested Gratuity Value 1	10
Print Suggested Gratuity Value 2	15
Print Suggested Gratuity Value 3	20
Print Suggested Gratuity Value 4	25
Print Suggested Gratuity Value 5	30
Print Suggested Gratuities	Yes
Print Suggested Gratuities 1	Yes
Print Suggested Gratuities 2	Yes

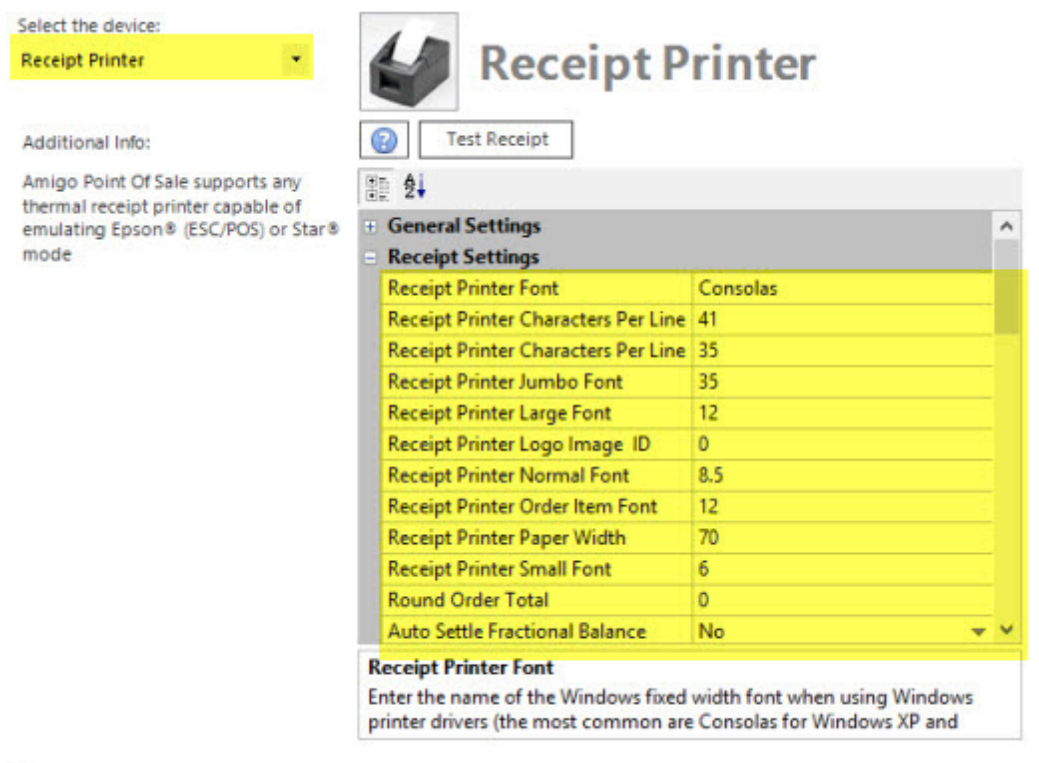
Suggested Gratuities  
Text to print on customer receipt for suggested gratuities header

### Suggested Gratuities

- **Suggested Gratuities:** Text to print on customer receipt for suggested gratuities header
- **Print Suggested Gratuity Value 1:** Whole number percentage value of suggested gratuity #1
- **Print Suggested Gratuity Value 2:** Whole number percentage value of suggested gratuity #2
- **Print Suggested Gratuity Value 3:** Whole number percentage value of suggested gratuity #3
- **Print Suggested Gratuity Value 4:** Whole number percentage value of suggested gratuity #4
- **Print Suggested Gratuity Value 5:** Whole number percentage value of suggested gratuity #5
- **Print Suggested Gratuities:** Enable suggested gratuities at the bottom of the customer receipt
- **Print Suggested Gratuities 1:** Set to Yes to print suggested gratuities #1 at the bottom of the customer receipt
- **Print Suggested Gratuities 2:** Set to Yes to print suggested gratuities #2 at the bottom of the customer receipt
- **Print Suggested Gratuities 3:** Set to Yes to print suggested gratuities #3 at the bottom of the customer receipt
- **Print Suggested Gratuities 4:** Set to Yes to print suggested gratuities #4 at the bottom of the customer receipt
- **Print Suggested Gratuities 5:** Set to Yes to print suggested gratuities #5 at the bottom of the customer receipt

## Receipt Settings

Additional formatting is possible by changing the settings under the Receipt Settings heading. Many setting names are short and may not be self explanatory; click on the setting to view a brief explanation of the setting at the bottom of the screen.



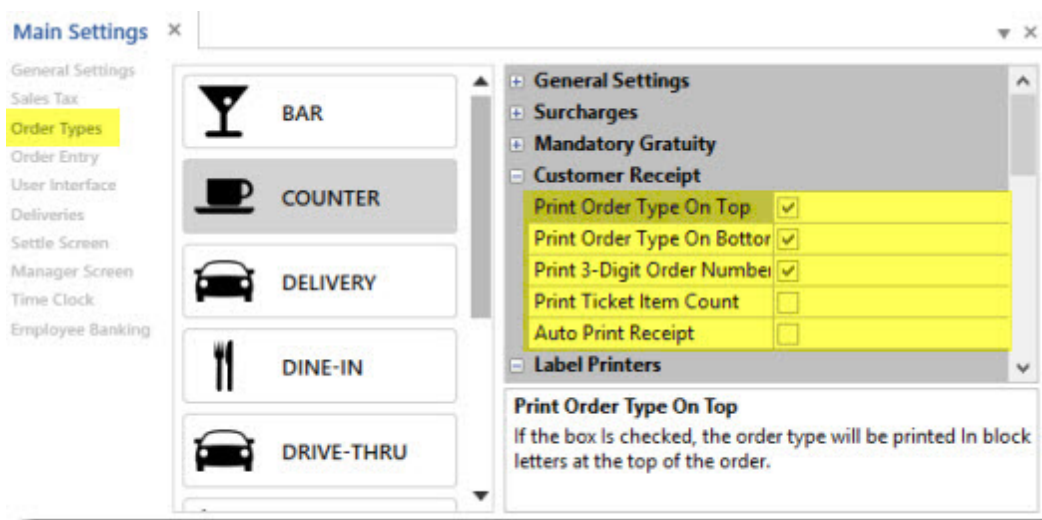
### Additional Receipt Settings

- **Auto Settle Fractional Balance:** Set to Yes to automatically settle orders with a balance less than .01.
- **Auto Settle Orders With No Transactions:** Set to No to prevent zero balance orders from automatically settling if no order transactions exist
- **Combine Order Items:** Set to Yes to show reorders for the same item on a single receipt line. This feature is useful for bars to reduce the size of the customer receipt and reduces the time required to recall an order.
- **Print Space Between Order Items:** Print a blank line between items on customer receipt
- **Print After Void:** Set to Yes to automatically print customer receipt after voiding it
- **Print Bar Tab Name:** Print bar tab name on customer receipt for receipts printed after initial bar tab order is submitted
- **Print Bitmap Logo:** Print the stored bitmap image on the customer receipt
- **Print Bottom Barcode:** Print scannable Code 39 barcode at the bottom of the customer receipt
- **Print Bottom Line 1:** Print additional text at the 1st line on the bottom of the customer receipt
- **Print Bottom Line 2:** Print additional text at the 2nd line on the bottom of the customer receipt
- **Print Bottom Line 3:** Print additional text at the 3rd line on the bottom of the customer receipt
- **Print Bottom Line 4:** Print additional text at the 4th line on the bottom of the customer receipt
- **Print Bottom Line 5:** Print additional text at the 5th line on the bottom of the customer receipt
- **Print Bottom Time:** Print time on bottom of receipt
- **Print Header:** Print server name, order type, table at the top of the customer receipt
- **Print Subtotal:** Print the subtotal on the customer receipt
- **Print Top Line 1:** Print additional text at the 1st line on the top of the customer receipt
- **Print Top Line 2:** Print additional text at the 2nd line on the top of the customer receipt
- **Print Top Line 3:** Print additional text at the 3rd line on the top of the customer receipt
- **Print Top Line 4:** Print additional text at the 4th line on the top of the customer receipt

- **Print Top Line 5:** Print additional text at the 5th line on the top of the customer receipt
- **Print Transactions:** Print all transactions at the bottom of the customer receipt
- **Print Zero Cost Modifiers:** Print zero-cost modifiers under menu items on the customer receipt
- **Print Line Below Logo:** Print a line under the ticket logo or at top of ticket if no logo is used. Set to 0 for no line 1 for single line 2 for double line
- **Print Line Below Top Text:** Print a line under the top 5 ticket text lines. Set to 0 for no line 1 for single line 2 for double line
- **Print Line Below Header:** Print a line under the header. Set to 0 for no line 1 for single line 2 for double line
- **Print Line Above Total:** Print a line above the ticket total. Set to 0 for no line 1 for single line 2 for double line
- **Print Line Below Total:** Print a line under the ticket total. Set to 0 for no line 1 for single line 2 for double line
- **Print Line Above Bottom Text:** Print a line above the bottom 5 ticket text lines. Set to 0 for no line 1 for single line 2 for double line
- **Print Line Below Bottom Text:** Print a line under the bottom 5 ticket text lines. Set to 0 for no line 1 for single line 2 for double line
- **Round Order Total:** Enter a whole number to round the order total to the nearest amount. For example, to round an order to the nearest nickel, set the value to 5 so that 1.12 is rounded to 1.10 and 2.18 is rounded to 2.20 AmigoPOS will automatically calculate the difference required in the subtotal amount to round up or down. Only the subtotal is adjusted; the tax total remains the same and the order total is rounded to the correct amount.

### Order Type Specific Settings

Some customer receipt settings can be restricted to selected order types. Navigate to the [order types](#) editor and select the order type from the drop-down list to view the available settings.



Order Type Settings

- **Print Order Type On Top:** If the box is checked, the order type will be printed in block letters at the top of the order.
- **Print Order Type On Bottom:** If the box is checked, the order type will be printed in block letters at the bottom of the order.
- **Print 3-Digit Order Number At Bottom:** Set to Yes to print a large 3-digit order number at the bottom of the prep ticket and customer receipt. For example, Order Number 12345 will appear as ORDER 345. This setting applies to both the customer receipt and prep ticket.
- **Print Ticket Item Count:** Set to True to print the total number of items (excluding optionals) at the bottom of the order
- **Auto Print Receipt:** Automatically print receipt each time a transaction is completed on an order started with this order type



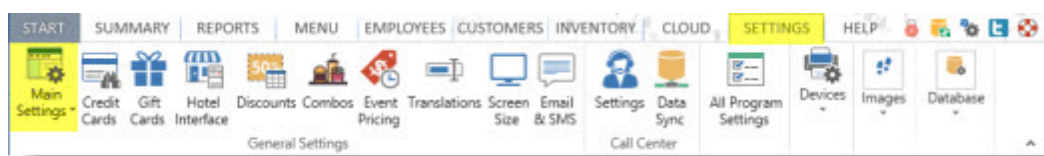
### 6.12.3 Receipt Printing Settings

AmigoPOS can be configured to print the customer receipt automatically based on order type or other preferences, as follows:

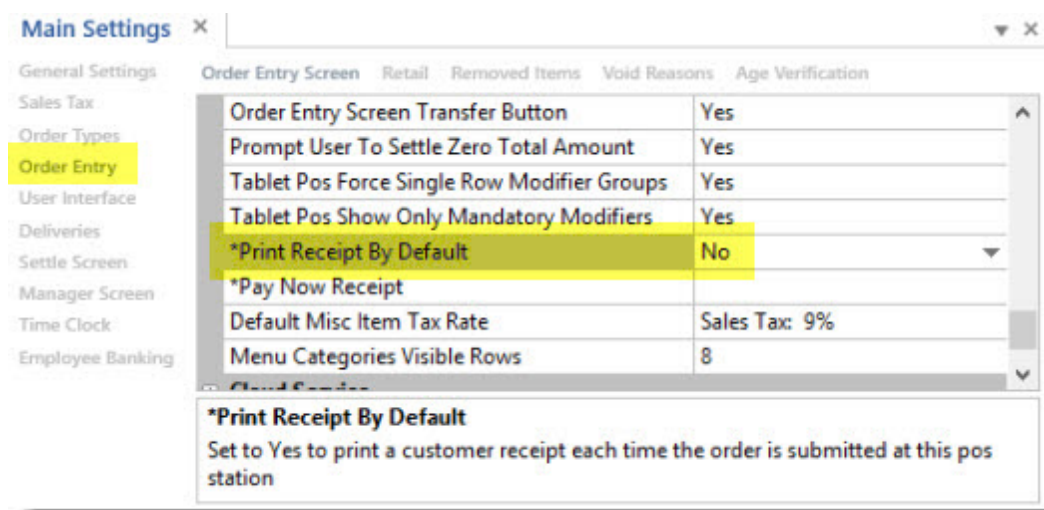
1. [Always print a customer receipt when the order is submitted](#) <sup>[240]</sup>
2. [Print a customer receipt for selected order types only](#) <sup>[240]</sup>
3. [Print a customer receipt when order is settled](#) <sup>[241]</sup>

#### Always print a customer receipt when the order is submitted

To always print a customer receipt when the Submit, Cash, Credit or Settle button is pressed on the order entry screen, set the **Print Receipt By Default** value to **Yes** in Back Office/Settings/ Main Settings/Order Entry, as shown below.



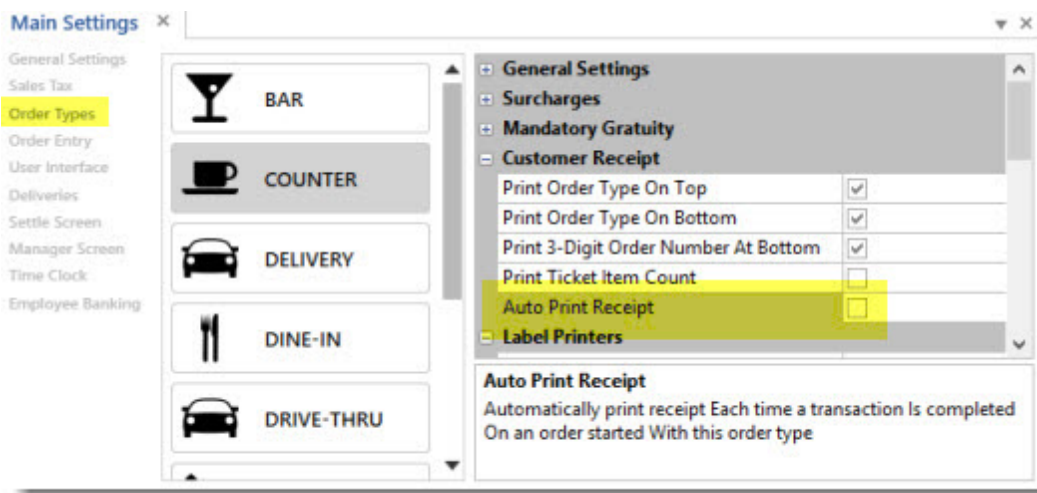
Back Office/Settings/Main Settings



Back Office/Settings/Main Settings/Order Entry Screen/Order Entry Buttons

#### Print a customer receipt for selected order types only

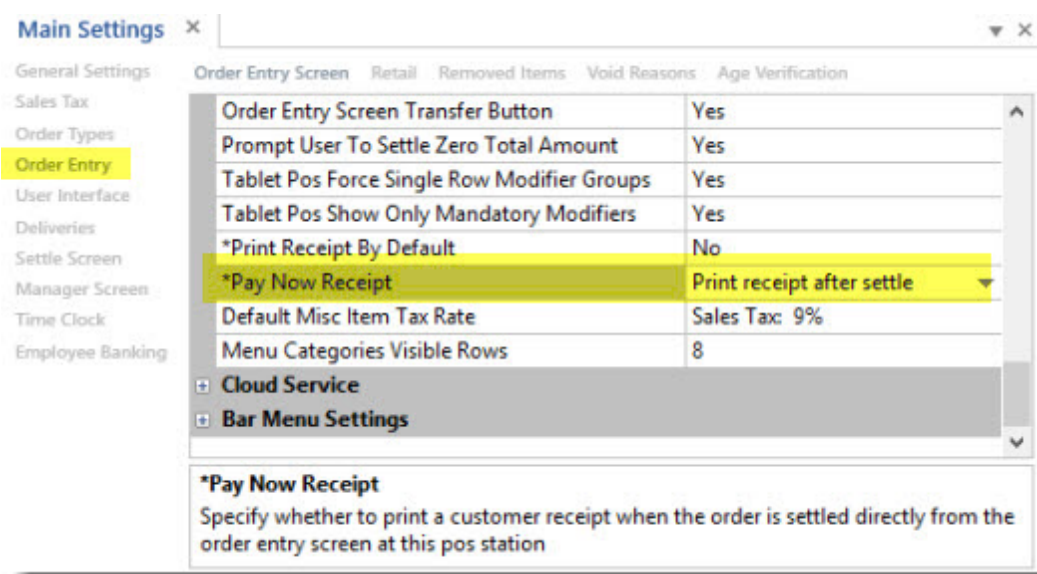
To always print a customer receipt for a specific order type when the transaction is completed on the settlement screen, check the box under the **Auto Print Receipt** column next to the order type in Back Office/Settings/ Main Settings/Order Types, as shown below.



Receipt Printing Based On Order Type

#### Print a customer receipt when order is settled

To always print a customer receipt after the order is settled when the Cash, Credit or Settle button is pressed on the order entry screen, set the **Pay Now Receipt** value in Back Office/Settings/ Main Settings/Order Entry as shown below. The value can be either **Print Receipt After Settle** or **Do Not Print Receipt**.

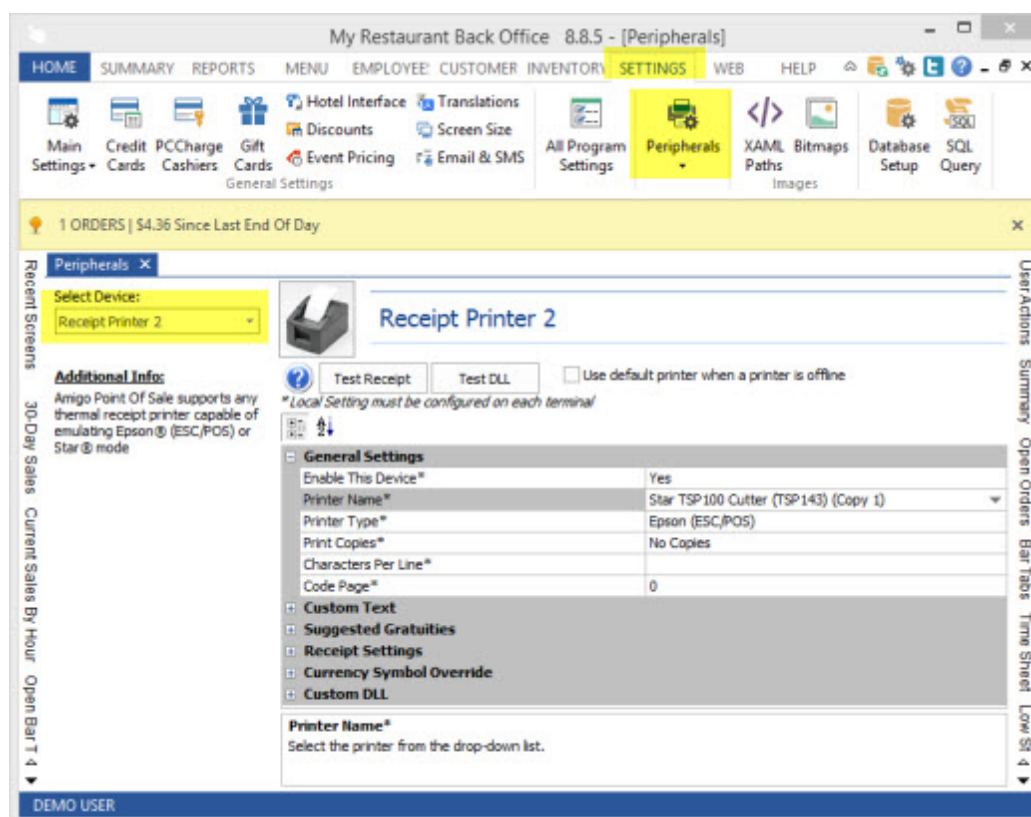


Back Office/Settings/Main Settings/Order Entry Screen/Order Entry Buttons

## 6.12.4 Second Receipt Printer

A second receipt printer is useful for fast food restaurants that require an additional customer receipt to be printed at the bagging station or when the tablet server is used to print customer receipts to the printer located closest to the tablet. Installation and setup is identical to the instructions for the default receipt printer.

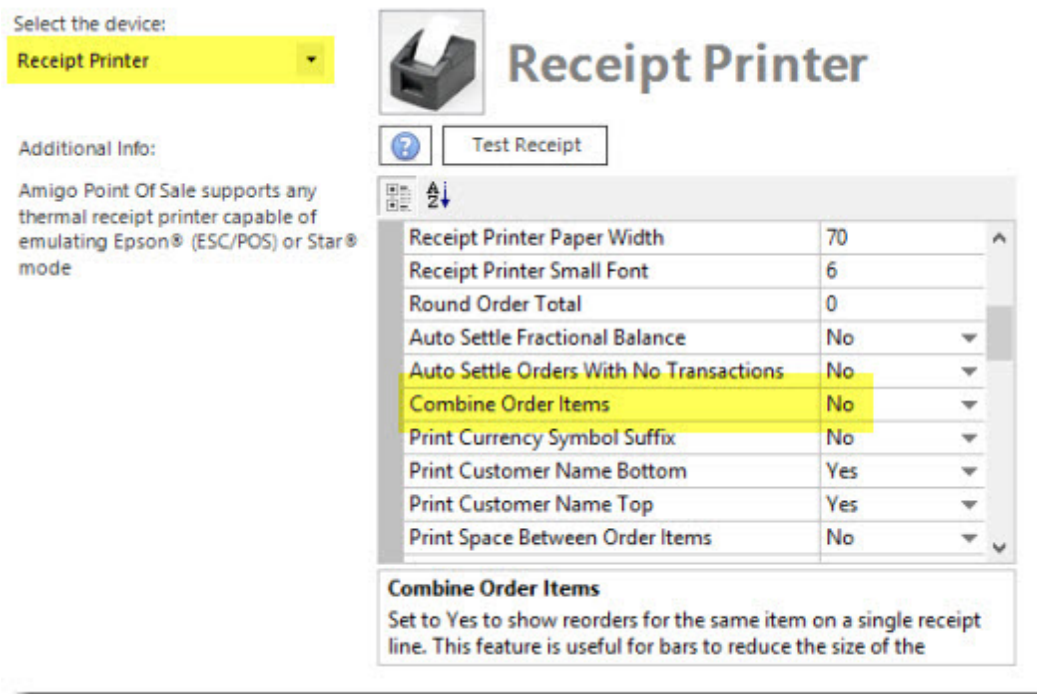




Receipt Printer 2 Settings

### 6.12.5 Combining Items On Receipt

AmigoPOS has the ability to combine regular and bar menu items on the customer receipt to save paper. In addition, enabling this feature will reduce the time required to recall an order that contains many identical menu items. Only items that do not have modifiers and are assigned to the same guest (dine in orders) will be combined. Other items are listed line by line. To enable this feature, open Back Office/Settings/Peripherals/> Receipt Printer and set the value of **Combine Ticket Items** to **Yes**.



### Combine Order Items

For example, suppose an order that contains the following is submitted:

- 1 Coke
- 1 Chocolate Milkshake
- 1 Bacon Burger
- 1 Turkey Sub with Onions

## Original Order

CUSTOMER COPY	Counter
SERVER: Jeff B.	
Coke	1.25
Milkshake	2.50
Chocolate	
Turkey Sub	4.75
Onions	
Bacon Burger	5.75
SUBTOTAL: \$14.25	

Original Order

The table then requests one more of each item. When the order is recalled and submitted, the customer receipt appears as below, where the Chocolate Milkshake and Turkey Sub are not combined because they have modifiers. Both customer receipts are shown below.

## Recalled Order

```
=====
CUSTOMER COPY                               Counter
SERVER: Jeff B.
=====
```

```
Coke (2 @1.25)                             2.50
```

```
Milkshake                                  2.50
Chocolate
```

```
Turkey Sub                                4.75
Onions
```

```
Bacon Burger (2 @5.75)                    11.50
```

```
Milkshake                                  2.50
Chocolate
```

```
Turkey Sub                                4.75
Onions
```

SUBTOTAL:   \$28.50

Recalled Order

### 6.12.6 Printer Bitmap Logo

Thermal printer users may wish to print a custom logo on the customer receipt. This is a simple process that requires minimum initial setup. First, prepare a suitable logo image. A sample logo named is included in the program installation directory. The dimensions of this image are 500px wide by 172px high, but you may resize the image to suite your needs. Using your favorite image editing program, create a black and white logo and export it as an 8-bit black and white bitmap image (with the .bmp extension).

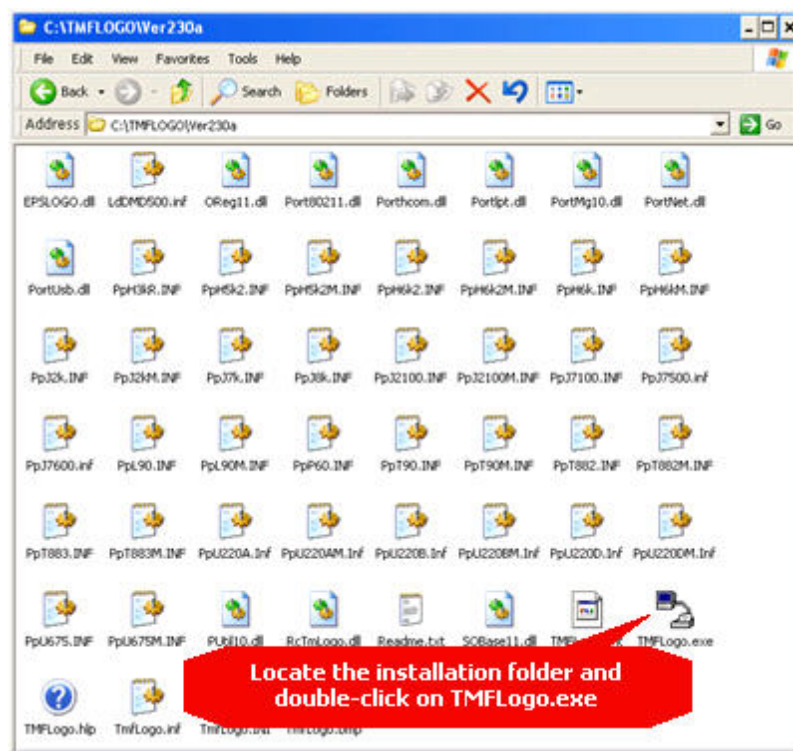


A sample printer logo

If you have not already done so, download and install the Epson advanced printer driver. This driver can be downloaded from <http://www.epsonexpert.com/>. Create a new order in AmigoPOS to ensure that your printer is installed correctly. Consult the help manual for additional help in setting up your receipt printer. Next, download and install the Epson TM Flash Logo Utility from <http://www.epsonexpert.com/>. Make a note of the installation directory, as the installer does not create a desktop or start menu shortcut (Star and Dell thermal receipt printers include a logo upload utility on the driver disk included with the printer).

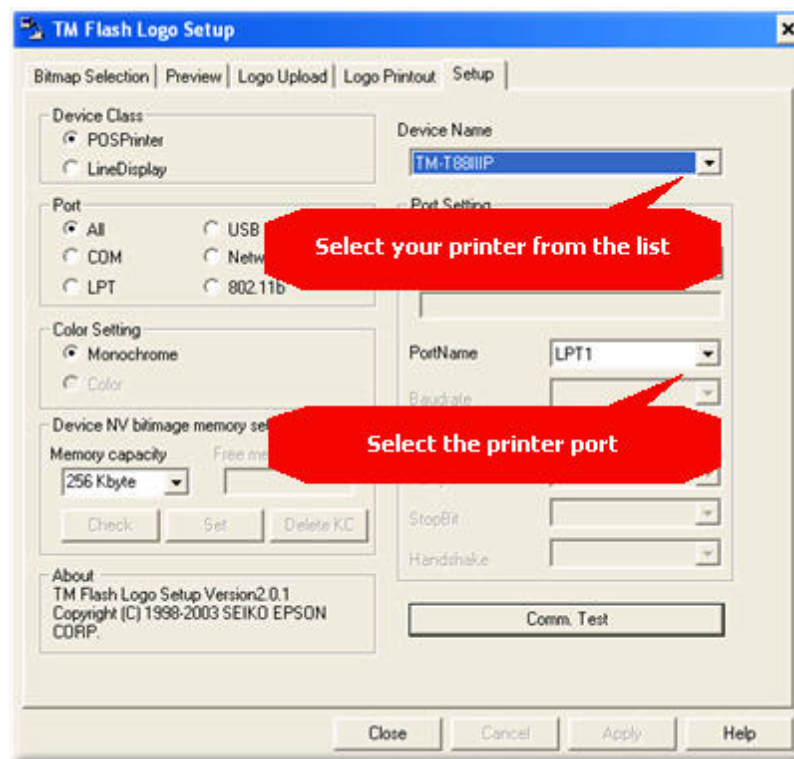
Follow the steps below to enable your printer to print your logo on the receipt:

1. Locate the Epson TM Flash Logo Utility's installation directory and double-click on **TMFlash.exe**



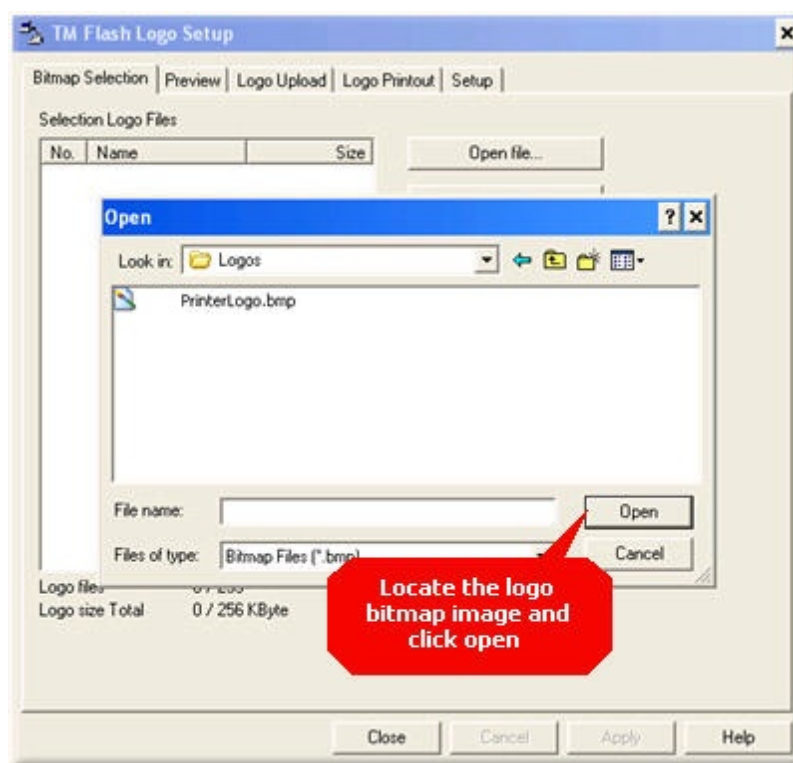
Locate the installation directory

2. Click the **Setup** tab and select your printer from the drop-down list under **Device Name**. Next, select the interface port next to **Port Name**. Click the **Apply** button followed by the **Comm. Test** button to ensure that your printer settings are correct.



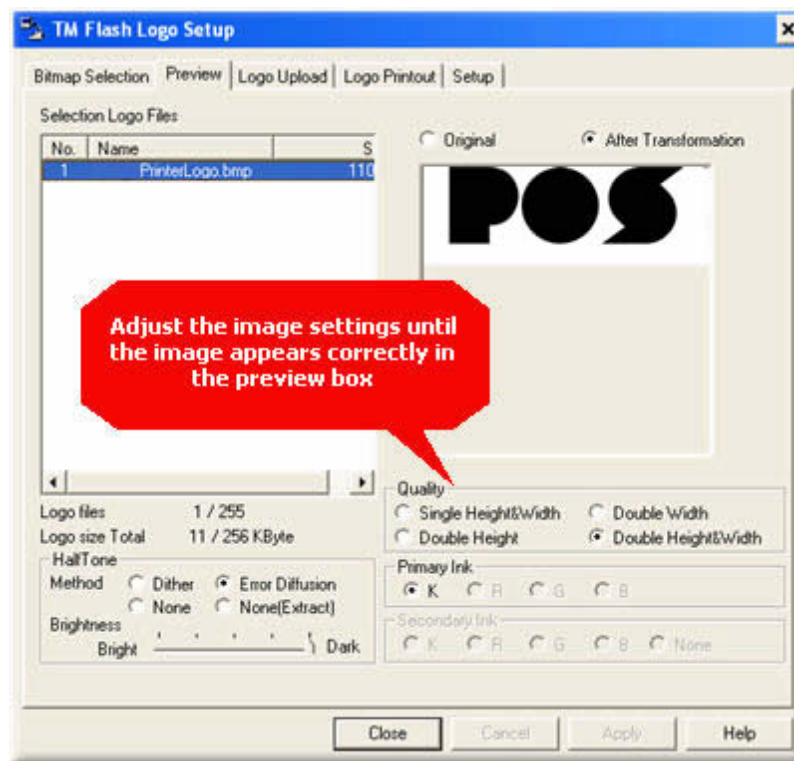
Setting the device properties

3. Next, choose the **Bitmap Selection** tab and click the **Open File...** button to locate your logo file. Navigate to the directory that contains the logo file and click the **Open** button.



Select the image file

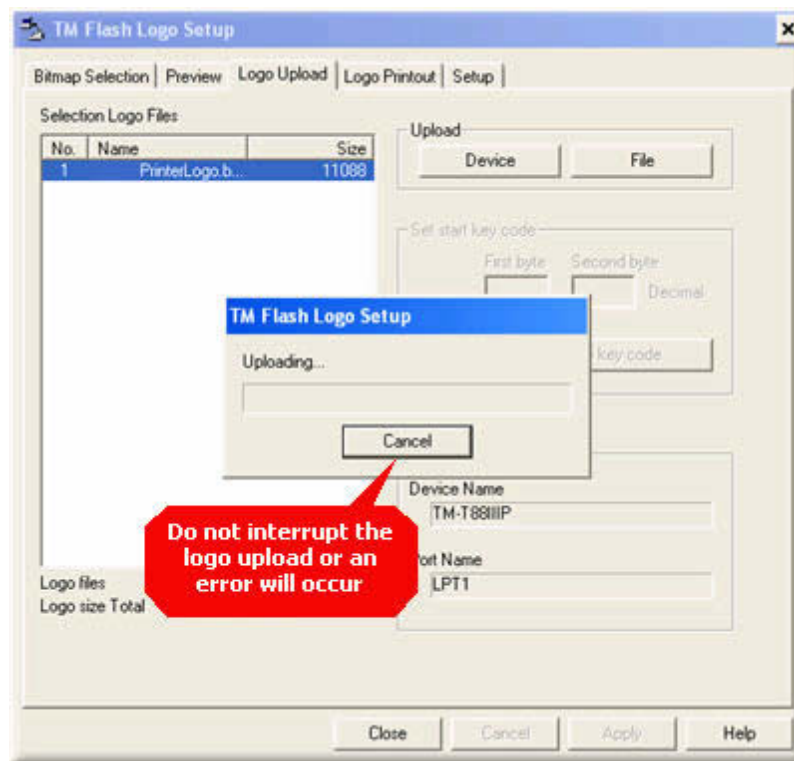
4. Now choose the **Preview** tab to ensure that your logo will appear correctly on the customer receipt. If you are using a logo with the dimensions of the logo sample provided with AmigoPOS, you should select **Double Height/Width** under **Quality** to stretch the logo horizontally while keep the correct image proportions. Ensure that the image fills the **Preview** box. If not, your logo will most likely appear on the left side of the receipt.



**Preview the logo image**

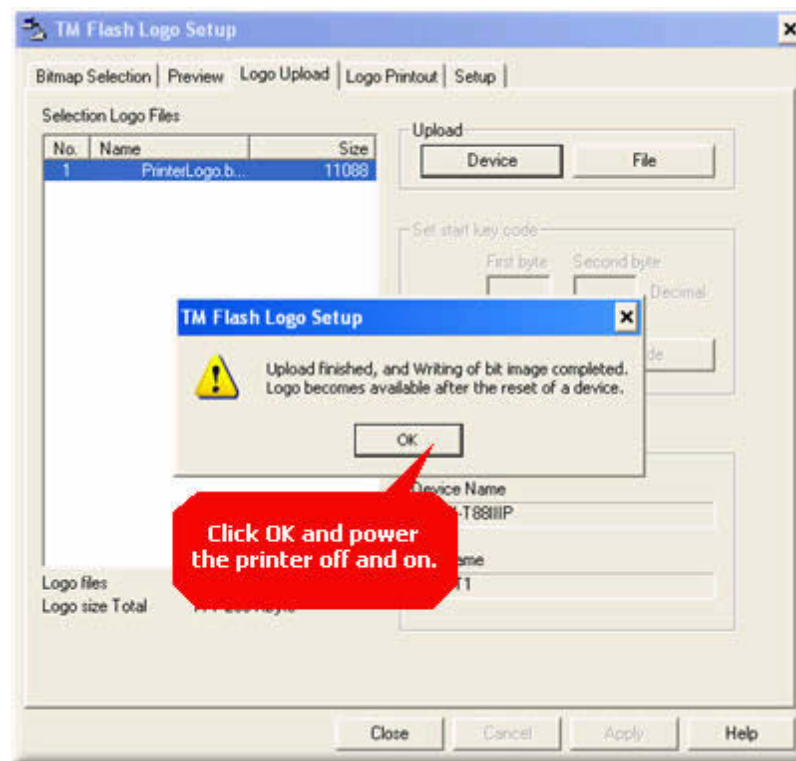
5. The logo can now be uploaded to the printer. Select the **Logo Upload** tab and click the Device button. The upload will begin automatically. Do not interrupt the process or an error will result.





**Send the logo to the printer**

6. The utility will confirm that the logo has been uploaded successfully. When your logo is finished uploading, your printer may emit a slight click followed by a single flash of the red Error LED on the printer's control panel. This is normal and does not indicate a problem. Click the **OK** button and followed by the **Close** button to shut down the program. Cycle your printer off and then on again. Open AmigoPOS and create a customer receipt to ensure that the logo is uploaded correctly.



**Reset the printer**

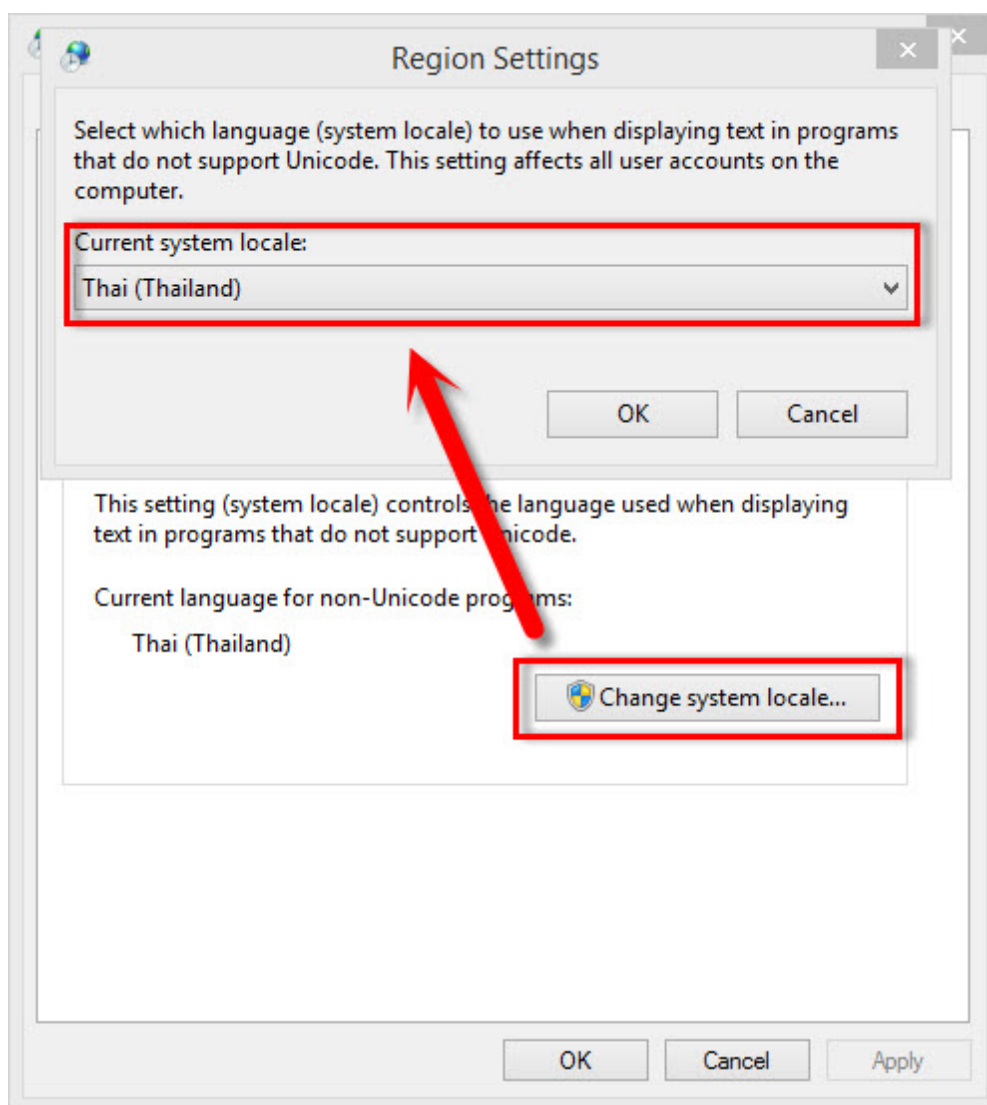
## 6.12.7 Thai Language Example

The following example details the steps required in order to use Thai characters for the screen interface, prep tickets and customer receipts on a pos station equipped with MS Windows and a Star TSP100 thermal printer. The Star TSP100 includes internal Thai character sets by default.

Note that many printers do not contain internal Thai characters by default and must be special ordered. AmigoPOS uses internal printer fonts to achieve maximum printing speed and quality, in contrast to many other pos applications that use Windows drivers to print Thai characters, resulting in greatly reduced (20-50 times) print speed and "fuzzy" characters due to the fact that Windows printer drivers must first convert the printout to a graphic before printing.

### 1. Configure Windows to use Thai characters

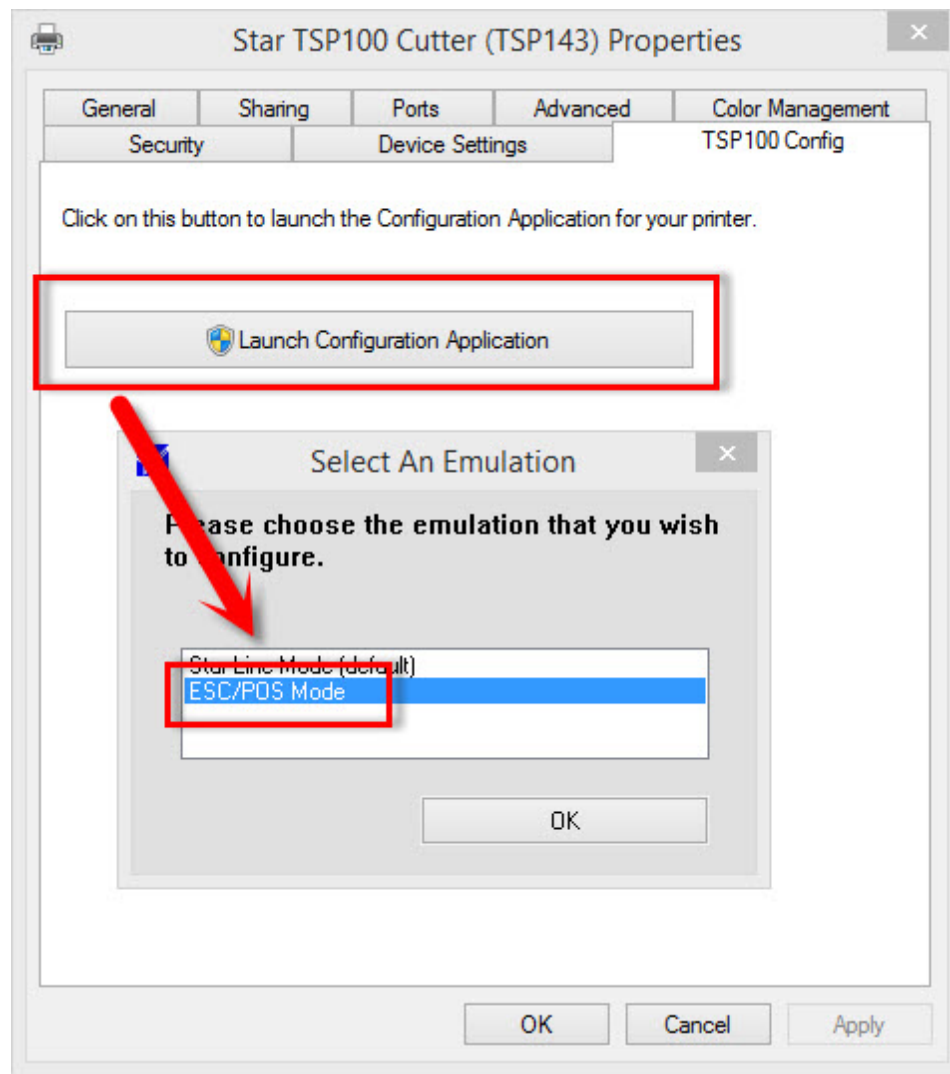
MS Windows must be configured to use Thai characters. Open the Windows Control Panel and click on the Region Settings applet. Select the 'Advanced' tab and choose Thai from the drop-down list. Click OK to reboot the PC.



**Specify the language in the Regional and Language Settings Control Panel Applet**

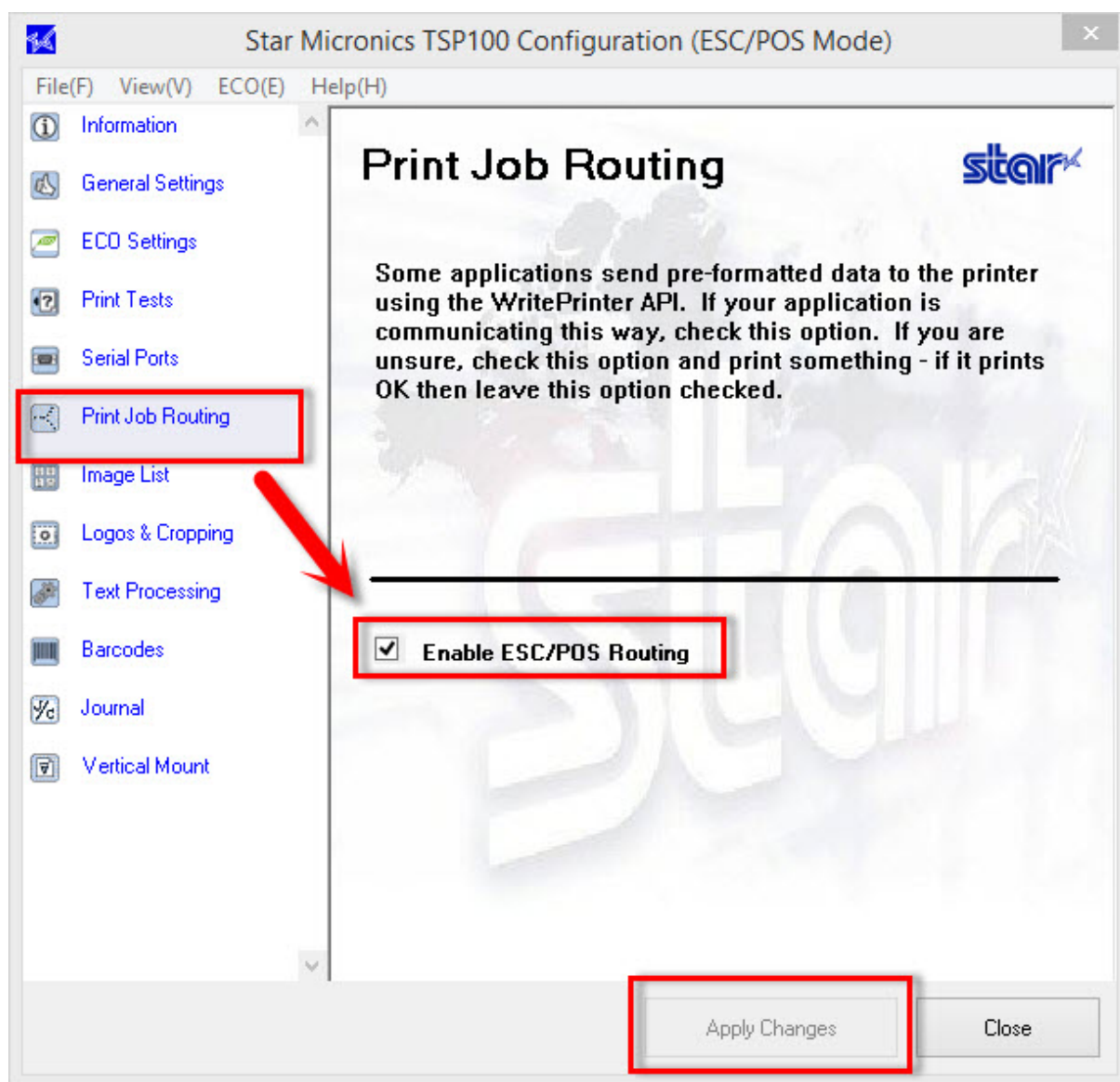
## **2. Configure the printer to use Thai characters**

After installing the Start TSP100, open the MS Windows Devices and Printers folder, right click on the receipt printer and click 'Printer Properties'. Select the TSP 100 Config tab and click the Launch Configuration Application button. Select ESC/POS Emulation and click OK.



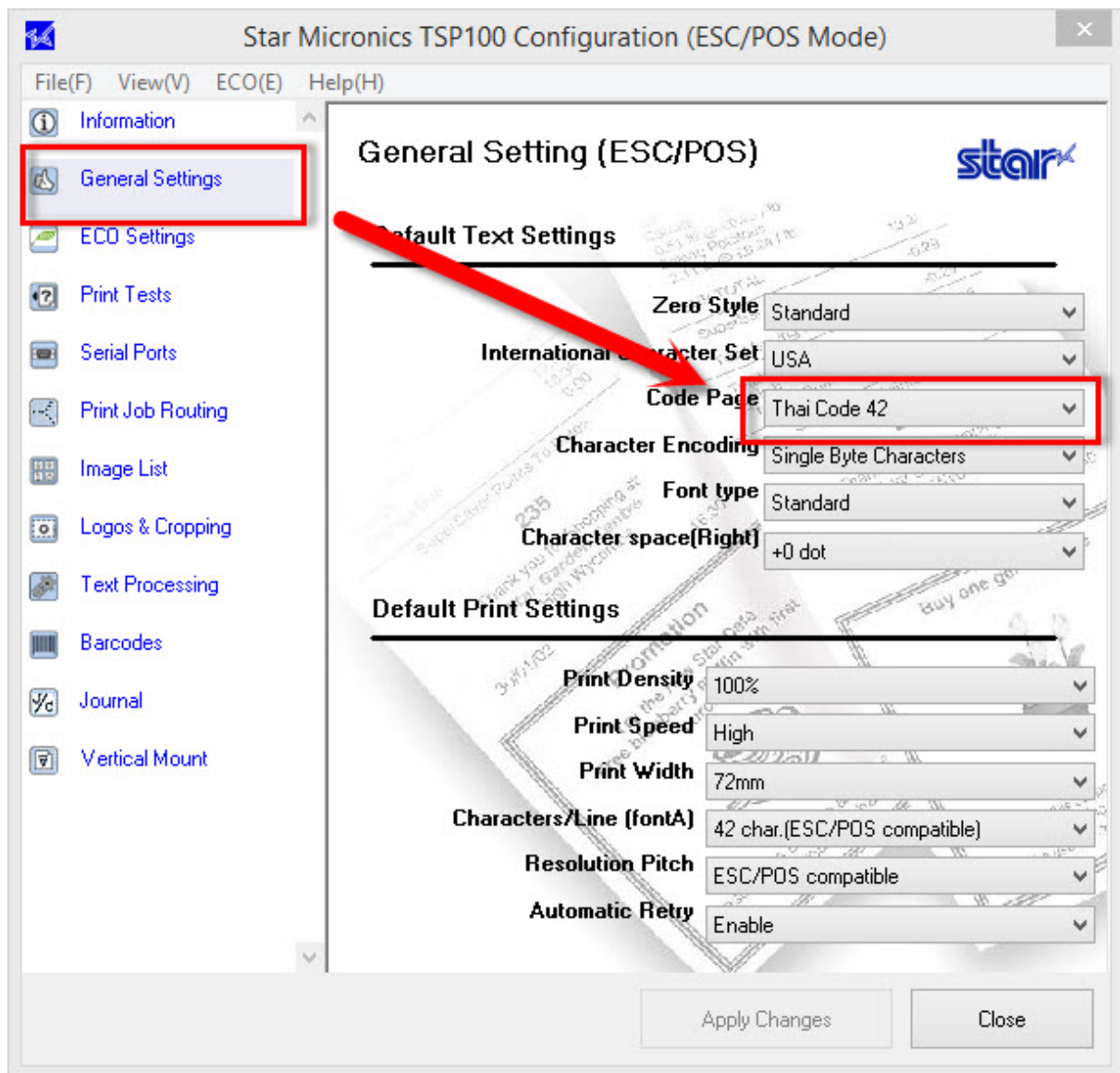
**Star TSP100 Driver Configuration**

Select the Print Job Routing tab and check the box next to Enable ESC/POS Routing. Click the Apply Changes button.



Star TSP100 Driver Configuration

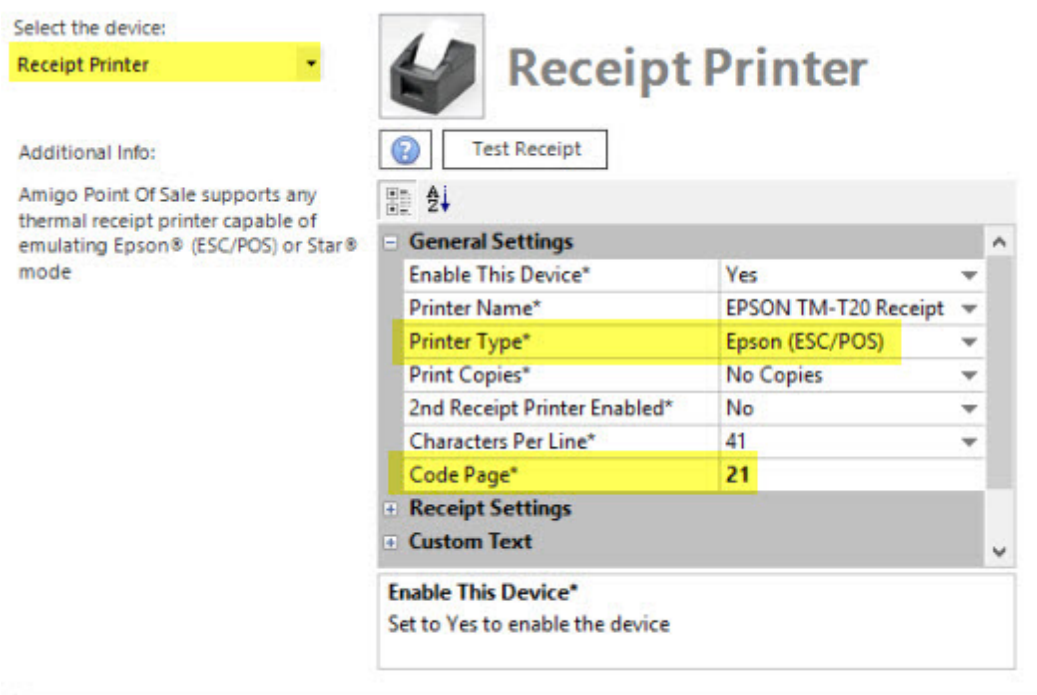
Select the General Settings tab and choose Thai Code 42 from the Code Page drop-down list. Click the Apply Changes button followed by the Close button.



Star TSP100 Driver Configuration

### 3. Configure AmigoPOS to use the Thai Code Page

In **Back Office>Settings>Peripherals**, select **Receipt Printer**, enter Code Page 21 and set the printer type to **Epson (ESC/POS)**.



**Specify the Code Page in Back Office/Settings/Peripherals/Receipt Printer/General Settings**

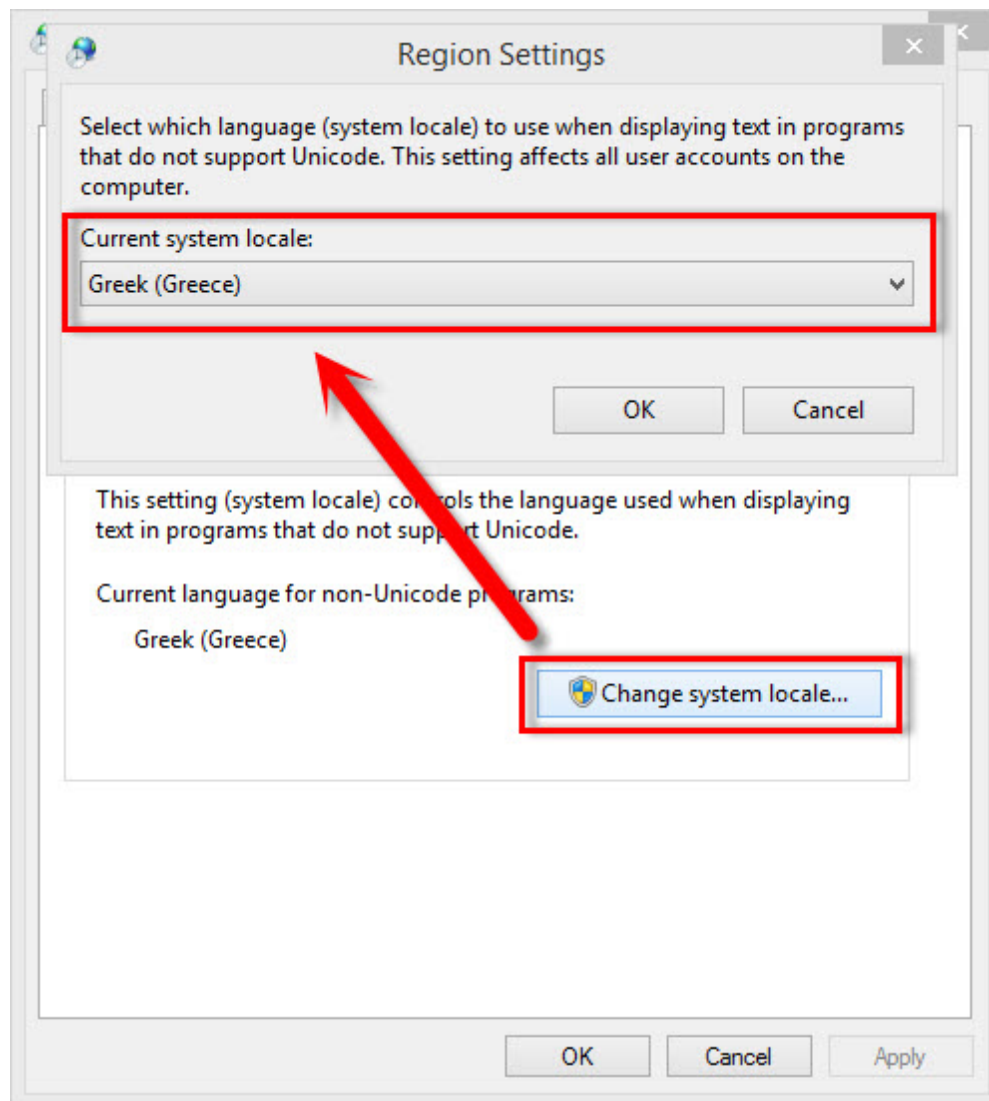
### 6.12.8 Greek Language Example

The following example details the steps required in order to use Greek characters for the screen interface, prep tickets and customer receipts on a pos station equipped with MS Windows and a Star TSP100 thermal printer. The Star TSP100 includes internal Greek character sets by default.

Note that many printers do not contain internal Greek characters by default and must be special ordered. AmigoPOS uses internal printer fonts to achieve maximum printing speed and print quality, in contrast to many other pos applications that use Windows drivers to print Greek characters, resulting in greatly reduced (20-50 times) print speed and "fuzzy" characters due to the fact that Windows printer drivers must first convert the printout to a graphic before printing.

#### 1. Configure Windows to use Thai characters

MS Windows must be configured to use Greek characters. Open the Windows Control Panel and click on the Region Settings applet. Select the 'Advanced' tab and choose Greek (Greece) from the drop-down list. Click OK to reboot the PC.

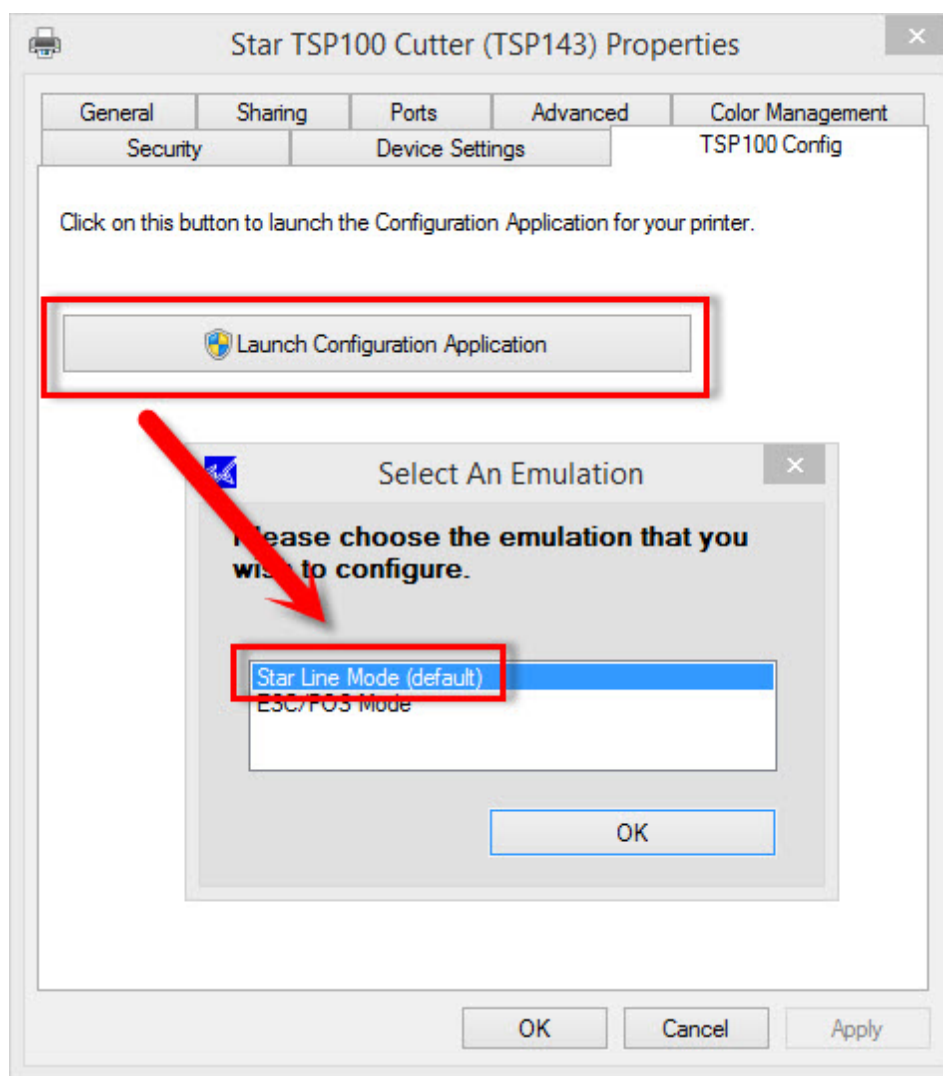


**Specify the language in the Regional and Language Settings Control Panel Applet**

## **2. Configure the printer to use Thai characters**

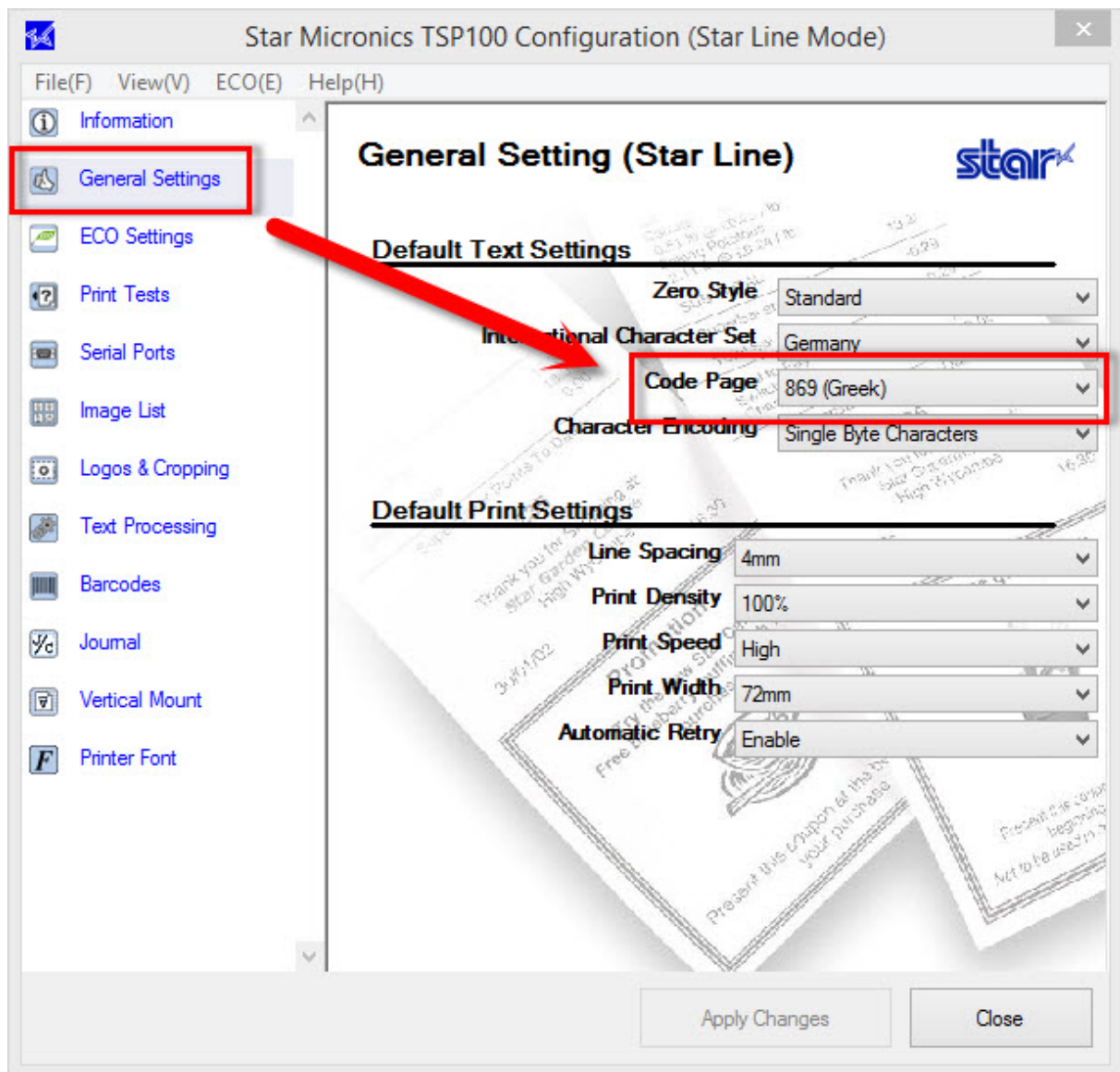
After installing the Start TSP100, open **Windows Control Panel>Devices and Printers**, right click on the receipt printer and click 'Printer Properties'. Select the TSP 100 Config tab and click the Launch Configuration Application button. Select Star Line Mode (default) emulation and click OK.





**Star TSP100 Driver Configuration**

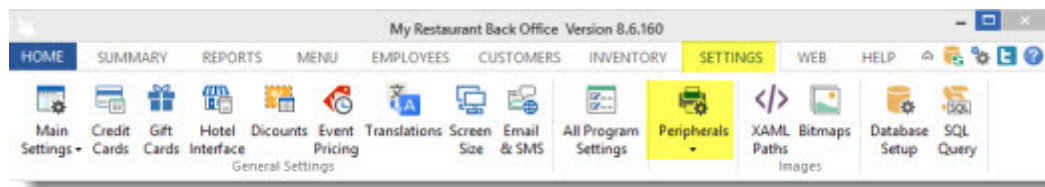
Select the General Settings tab and choose **869 (Greek)** from the Code Page drop-down list. Click the Apply Changes button followed by the Close button.



Star TSP100 Driver Configuration

### 3. Configure AmigoPOS to use the Greek 869 Code Page


In Back Office>Settings>Peripherals, select **Receipt Printer**, enter Code Page 18 and set the printer type to Star Line Mode.





Back Office&gt;Settings&gt;Peripherals

Select the device:  
**Receipt Printer**

Additional Info:  
 Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

 **Receipt Printer**

 **Test Receipt**

 **2**

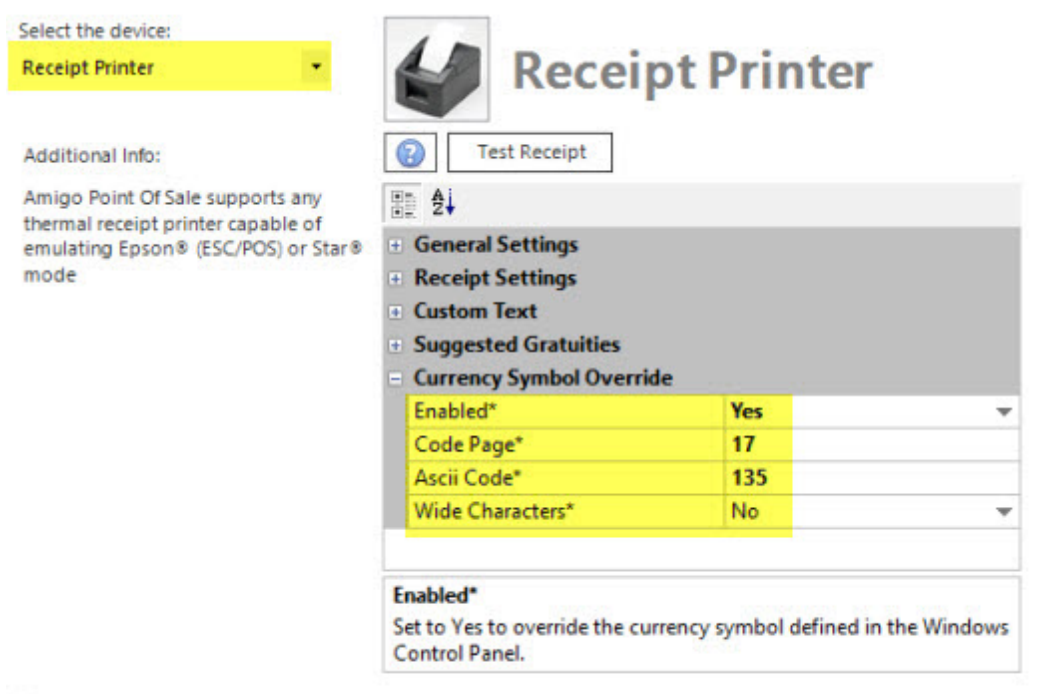
General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Star Line Mode
Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	18
+ Receipt Settings	
+ Custom Text	

**2nd Receipt Printer Enabled\***  
 Set to Yes to send a duplicate customer receipt to the receipt printer 2

**Specify the Code Page in Back Office>Settings>Peripherals>Receipt Printer>General Settings**

#### 4. Configure AmigoPOS to print the Euro (€) Symbol

In **Back Office>Settings>Peripherals>Receipt Printer>Currency Symbol Override**, set **Enabled** to **Yes**, enter Code Page 17, Ascii Code 135 and set Wide Characters to No.



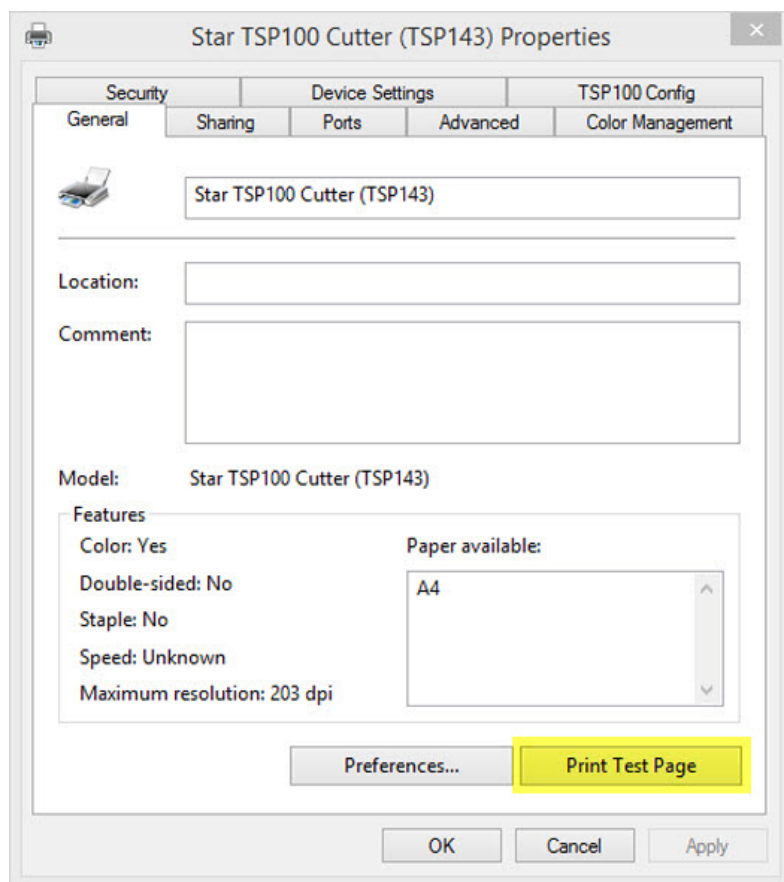
**Specify the Code Page in Back Office>Settings>Peripherals>Receipt Printer>Currency Symbol Override**

### 6.12.9 Windows Drivers

Users in regions where the language is displayed right to left or double-byte characters are used (such as Chinese) may wish to use Windows drivers to simplify the receipt printer setup. The printer's native command set is bypassed and Windows will format the print job as a graphic so that the code page is not used to select a font. Note that receipts take slightly longer to print and a small dialog will appear momentarily while the print job is sent to the receipt printer.

#### Setup

First install the printer using the manufacturer's printer driver and verify that a test page can be printed by opening the Printer Properties dialog in Windows Control Panel/Devices and Printers and clicking the Print Test Page button.





**Windows Control Panel/Devices and Printers/Printer Properties**



Open the receipt printer settings screen in **Back Office>Settings>Peripherals** and select the receipt printer from the drop-down list. Select **Windows Drivers** as the printer type and click the **Test Receipt** button to determine if the default settings are correct.

Select the device:  
**Receipt Printer**

Additional Info:  
 Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

 **Receipt Printer**

 **Test Receipt**

General Settings	
Enable This Device*	Yes
Printer Name*	EPSON TM-T20 Receipt
Printer Type*	Windows Drivers
2nd Receipt Printer Enabled*	No

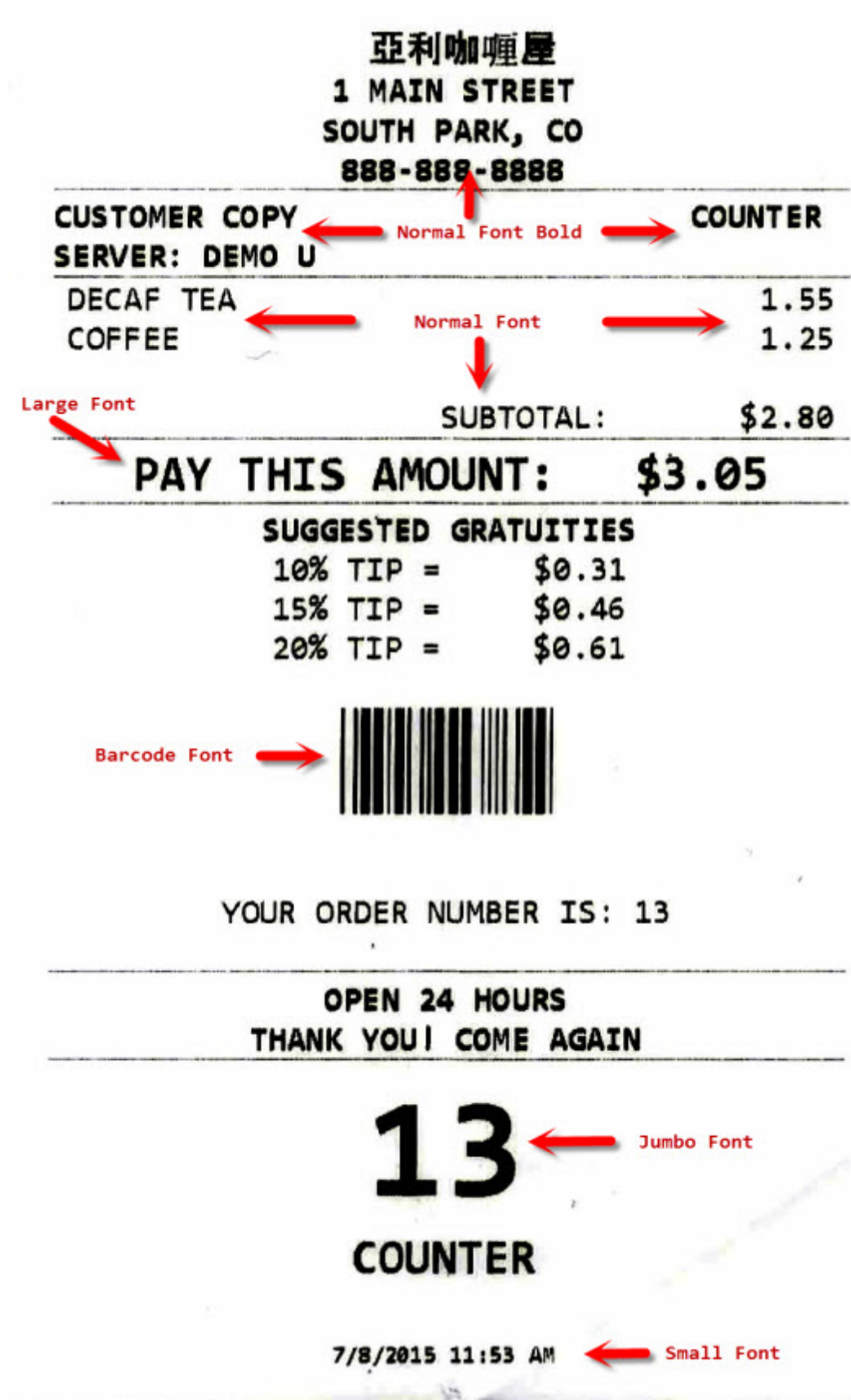
Receipt Settings	
Receipt Printer Font	Consolas
Receipt Printer Characters Per Line	41
Receipt Printer Characters Per Line Header	35
Receipt Printer Jumbo Font	35
Receipt Printer Large Font	12
Receipt Printer Logo Image ID	0
Receipt Printer Normal Font	8.5
Receipt Printer Order Item Font	12
Receipt Printer Paper Width	70

**Receipt Printer Font**  
 Enter the name of the Windows fixed width font when using Windows printer drivers (the most common are Consolas for Windows XP and Courier New for

### Receipt Printer Settings

The following settings are specific to receipt printers using Windows drivers, in addition to the settings described in the preceding topics:

- **Receipt Printer Barcode Font:** Enter the name of the Windows font used to print the barcode at the bottom of the receipt when using Windows printer drivers (Code39 is installed with the pos)
- **Receipt Printer Font:** Enter the name of the Windows fixed width font when using Windows printer drivers (the most common is Consolas for Windows 7/8/10)
- **Receipt Printer Characters Per Line:** Enter the number of characters that fit on a single line using the normal font when using Windows printer drivers
- **Receipt Printer Small Font:** Enter the font size to use when printing small text on the customer receipt when using Windows printer drivers
- **Receipt Printer Normal Font:** Enter the font size to use when printing most of the text on the customer receipt and reports when using Windows printer drivers
- **Receipt Printer Large Font:** Enter the font size to use when printing text such as Pay This Amount on the customer receipt when using Windows printer drivers
- **Receipt Printer Jumbo Font:** Enter the font size to use when printing text such as the large order number at the bottom of the customer receipt when using Windows printer drivers
- **Receipt Printer Paper Width:** Enter printable area of the receipt paper width in millimeters (70mm is appropriate for most common receipt printers)
- **Receipt Printer Right To Left:** Set to Yes if customer receipts are printed using RTL language such as Arabic (this setting applies when using Windows drivers only)
- **Receipt Printer Logo Image ID:** Enter the image id of the bitmap to print at the top of the customer receipt when using Windows drivers (feature not yet implemented)



Sample Customer Receipt



## 6.13 Scale

Many manufacturers provide OPOS (Ole for Point of Sale) drivers for point-of-sale hardware. AmigoPOS currently provides support for many OPOS scanners and scales. OPOS provides a device driver architecture that allows point-of-sale hardware to be easily integrated with AmigoPOS where OPOS controls handle communication between compatible hardware and AmigoPOS.

\*The next help topic contains specific instructions for Avery Berkel, NCI, Weigh-Tronix 6710 or similar scale.

An OPOS control consists of two parts:

1. Control object: The control object for a device class (such as line displays) provides the interface for the software program. A standardized set of OPOS control objects—known as the Common Control Objects—are provided with AmigoPOS and can be used with most devices.
2. Service object: The service object provides communication between the software and the device. Typically, the service object for a device is provided by the device manufacturer. Install the service object by inserting the device CD into the disk drive on the computer. Then follow the on-screen instructions.

The following example describes the installation and setup of a Metrologic Stratos 2320 Scale/Scanner using a single RS232 cable to communicate with the host PC. Many other manufacturers offer scale and scanner OPOS drivers, including Avery Berkel, Symbol and Datalogic.

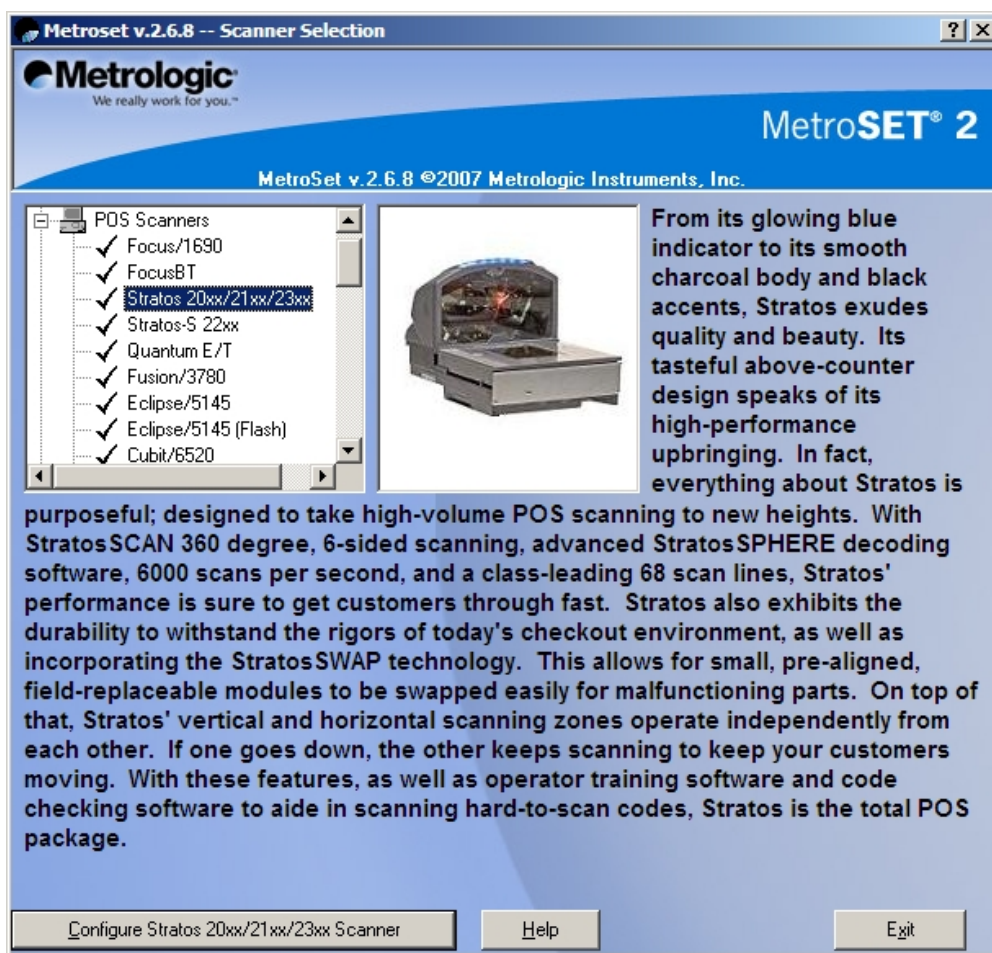
Installation is described in 3 steps:

- [Device Configuration](#)
- [OPOS Configuration](#)
- [AmigoPOS Configuration](#)

### **Device Configuration**

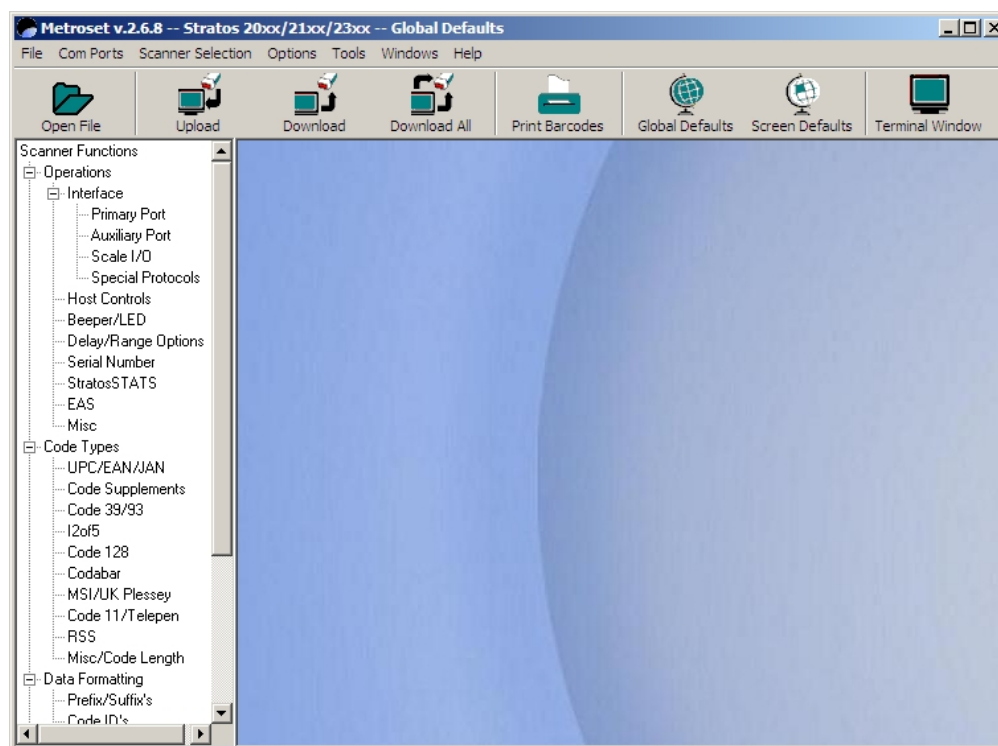
1. Download and install the manufacturer's setup utility





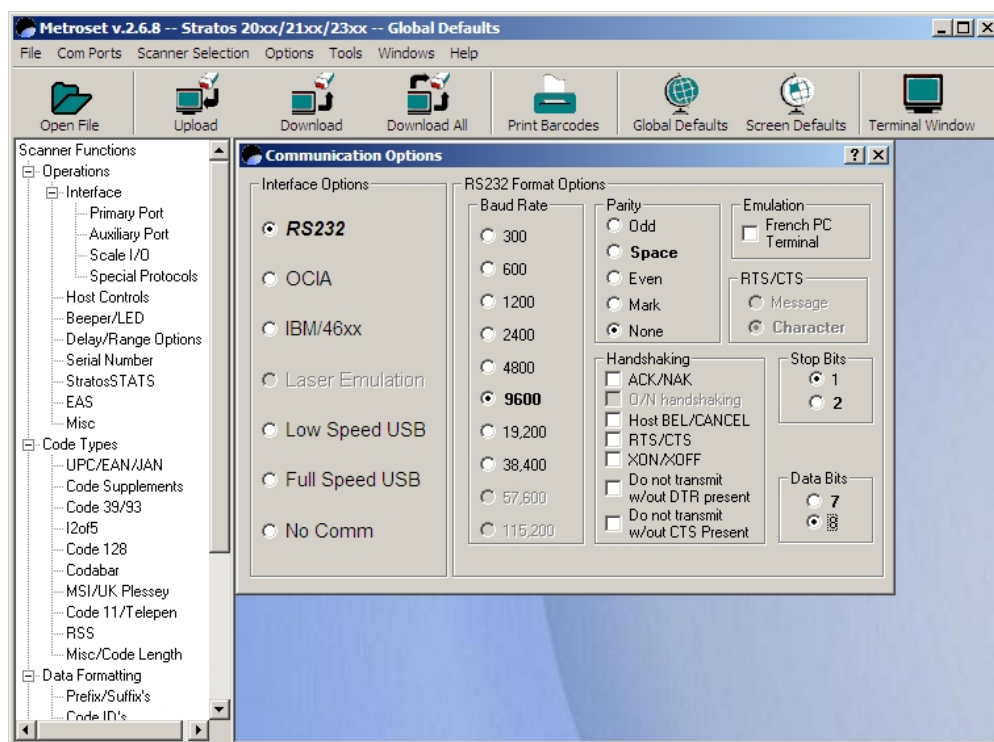
**The Metrologic Metroset® 2 configuration utility**

2. Select the device and click the Configure button



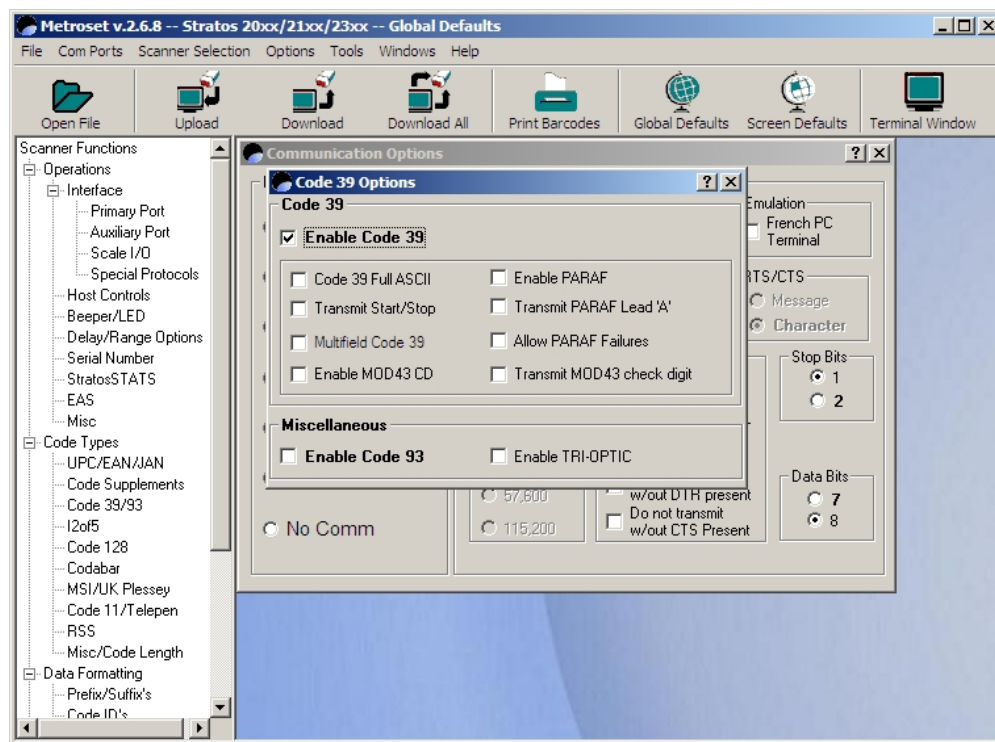
**The left menu displays available options after the device is selected**

3. Select the correct port from the Com Ports menu button. You may then upload the device's current configuration by clicking the Upload button. If an error occurs during the upload process, check the Com Port settings in Windows device manager and attempt to connect to the device using HyperTerminal.



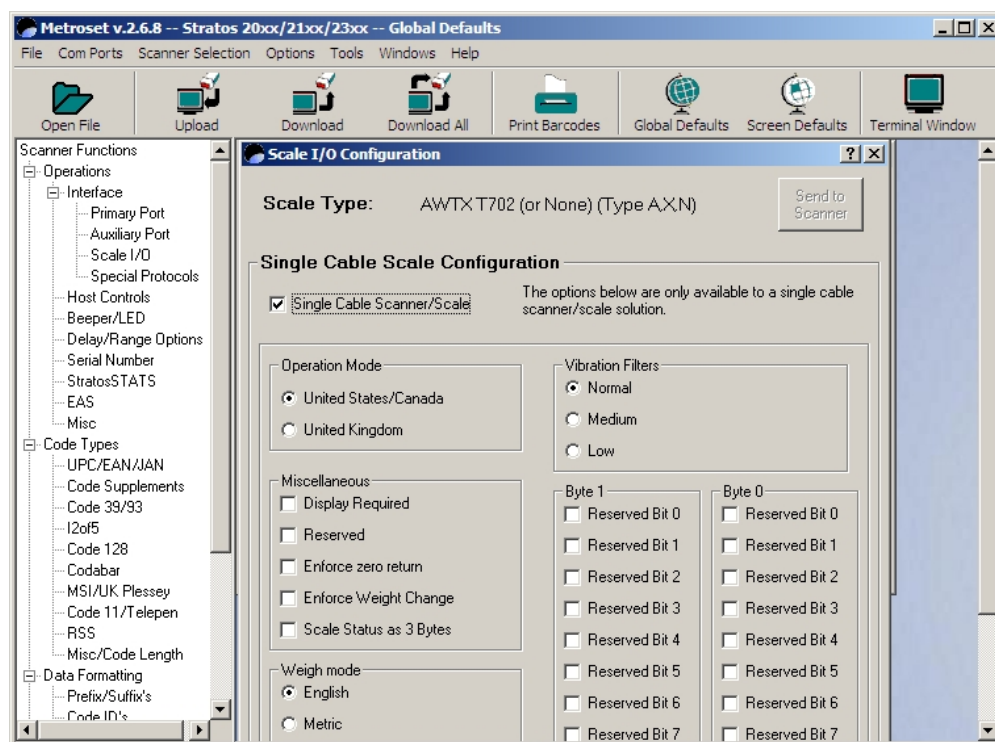
**Compare the settings with the port settings in the Device manager**

4. Click Primary Port to view the device's port settings. The settings should correspond to the port settings in Windows Device Manager.



**The barcode configuration screen**

5. Click Code 39/93 under the Code Types category. Check the box to enable the scanner to decode Code 39 barcodes. Code 39 barcodes are used on AmigoPOS customer receipts

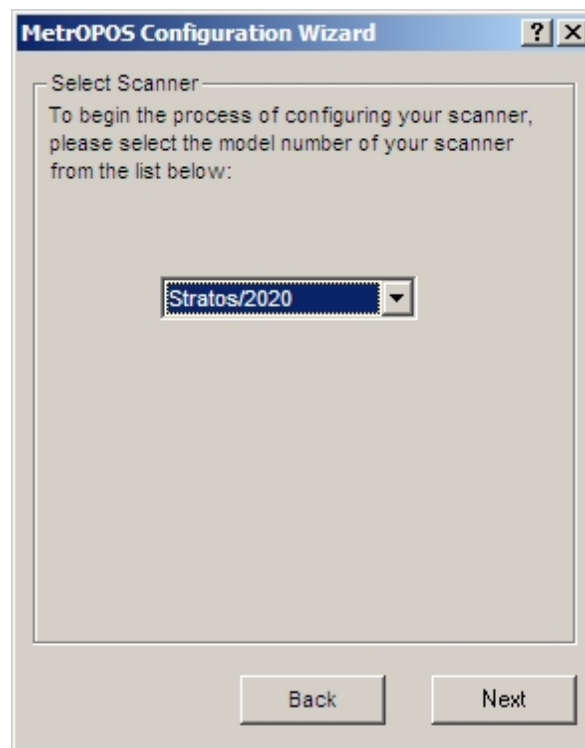


Specify the cable type

6. Click the scale I/O button and check the box to enable Single Cable Scanner/Scale operation. This allows the host to communicate with both the barcode scanner and scale over a single RS232 cable. If your configuration uses 2 RS232 cables, this box should be left unchecked.

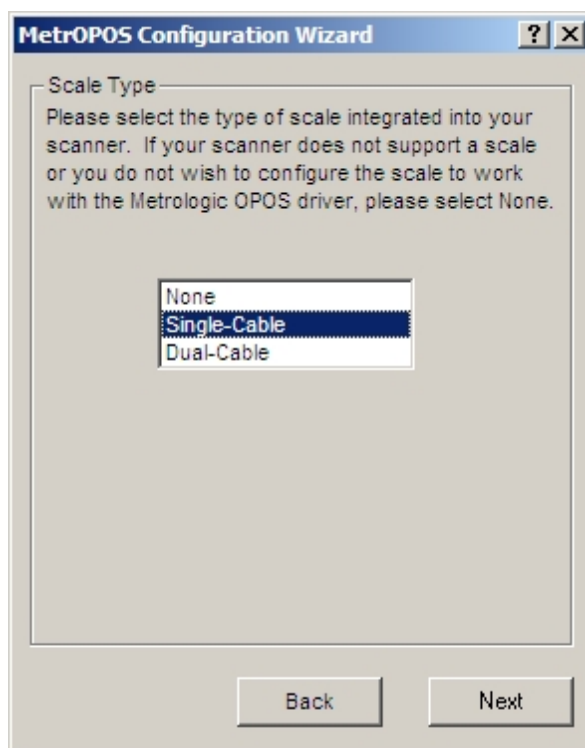
7. To complete the scanner configuration, select File - Print Configuration Barcodes. Disconnect the scanner/scale from the serial port, scan the barcodes in the order printed and restart the device.

### OPOS Configuration



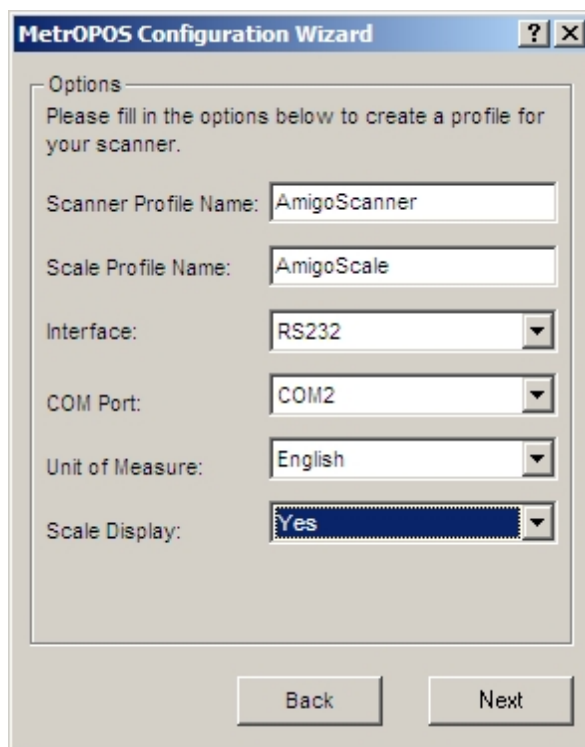
**Select the scale model**

1. Download and install the Metrologic OPOS configuration utility.(MetroOPOS). Run the utility and select the Stratos/2020 from the list that appears on the configuration wizard.



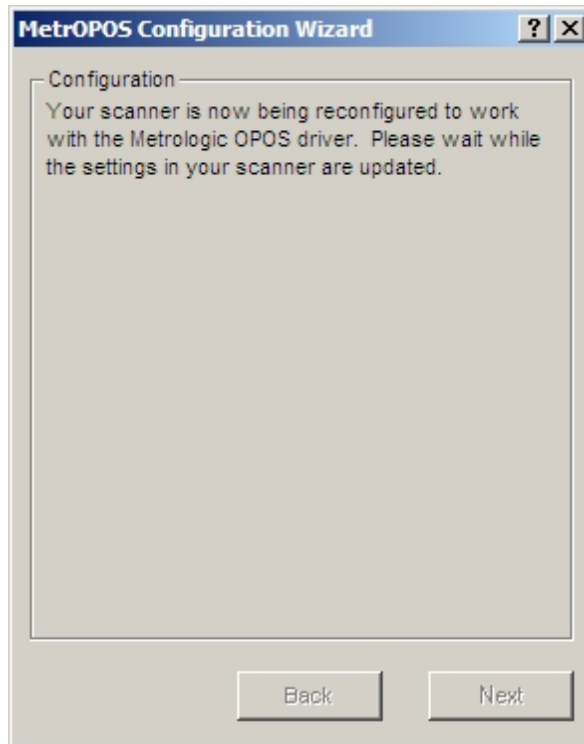
**Select the cable type**

2. Select Single-Cable as the Scale Type and click Next



**Enter a name for the device(s)**

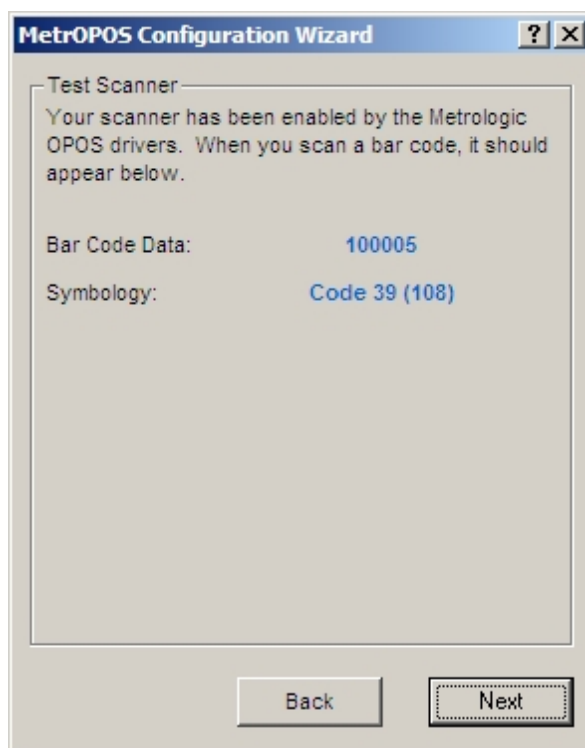
3. Enter a user friendly name for both the barcode scanner and scale and click Next



**Uploading new settings to the device**

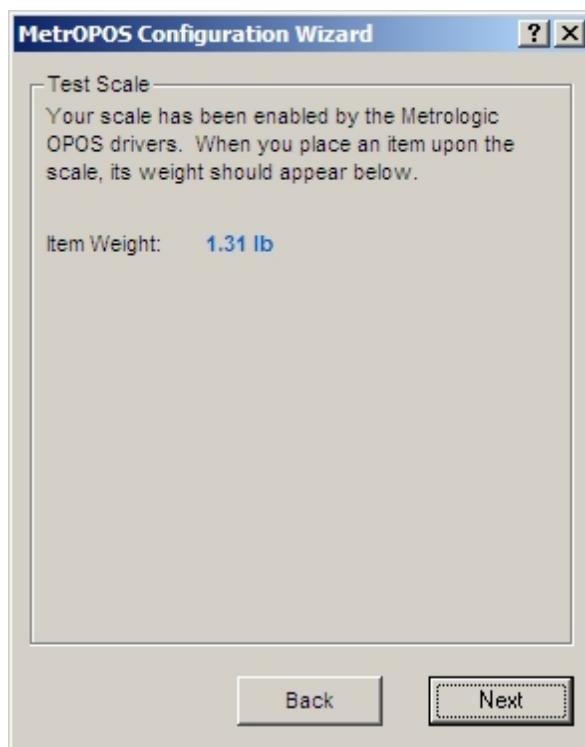
4. Allow 1-2 minutes for the utility to program the device. Do not interrupt the process





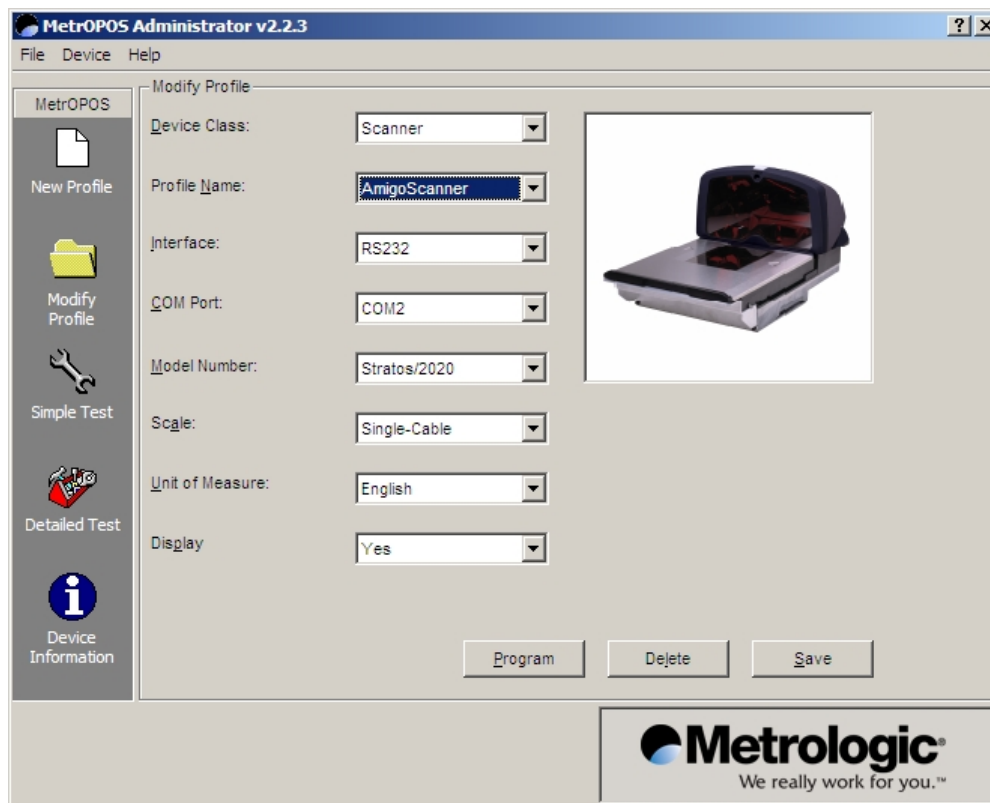
**Testing the integrated barcode scanner**

5. Test the barcode scanner and click Next



**Testing the scale**

6. Test the Scale and click Next

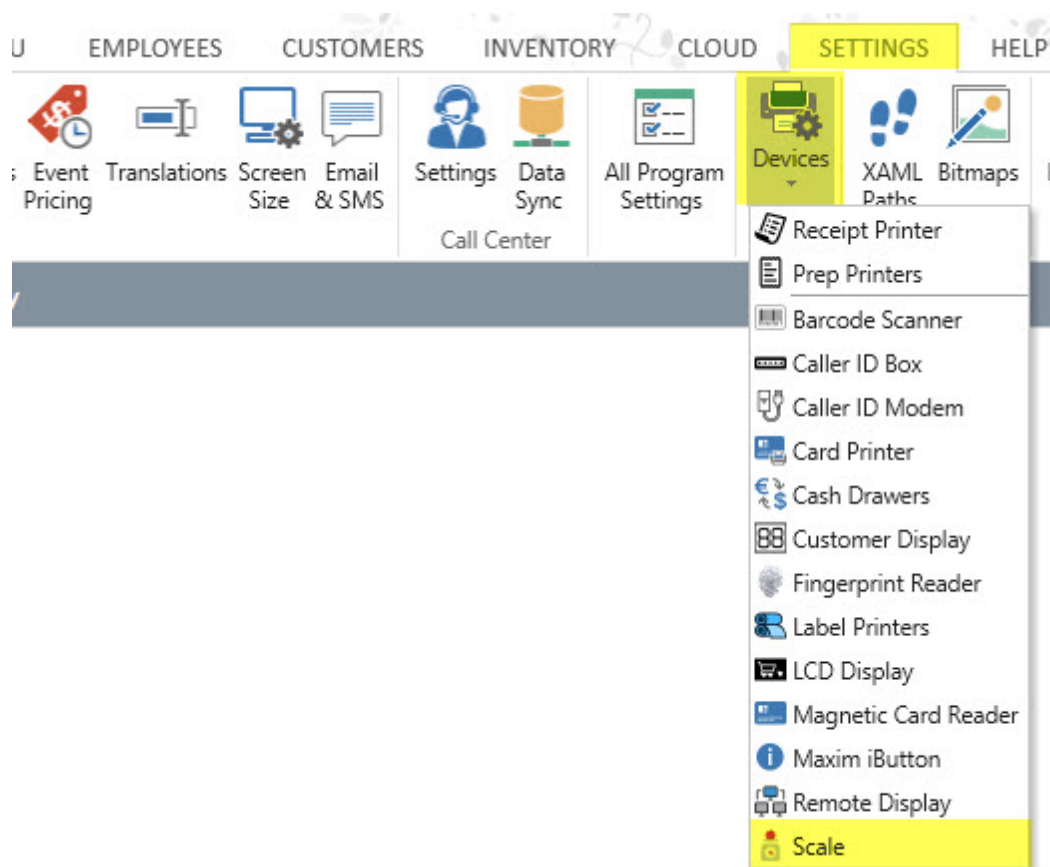


**Modifying the settings of a previously configured device**

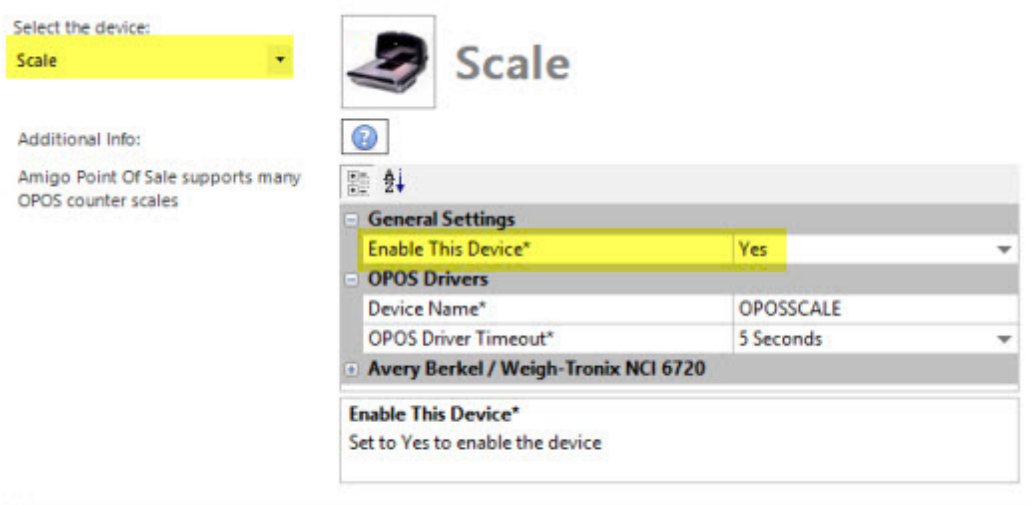
7. If errors occur during testing, click the Modify Profile button and make any necessary changes. Click the Save button followed by the Program button to send the new settings to the device.

### AmigoPOS Configuration

1. Open Back Office/Settings/Peripherals/and select **Yes** next to **Enable this device** on this pos station and enter the device name used above (Step 3).

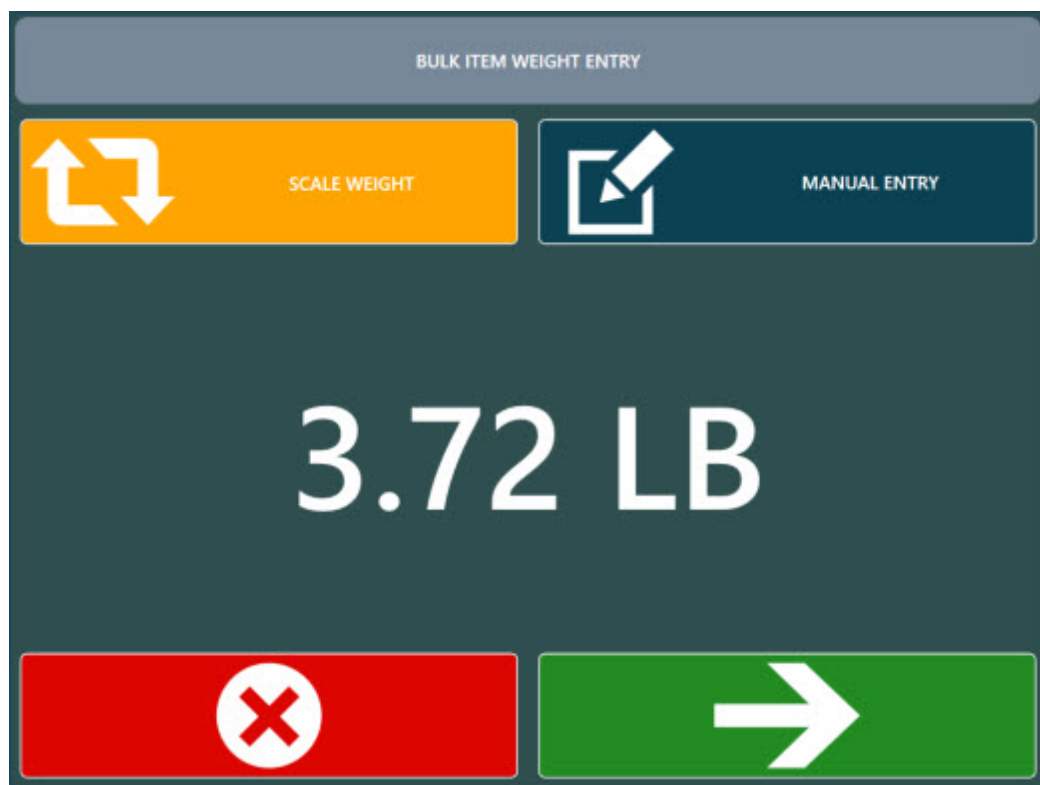


Back Office > Configuration > Peripherals



Counter Scale Configuration

2. Open the order entry screen and select press a bulk menu item button. A prompt will appear directing the user to place the item on the scale. Press the green arrow to add the item to the order.

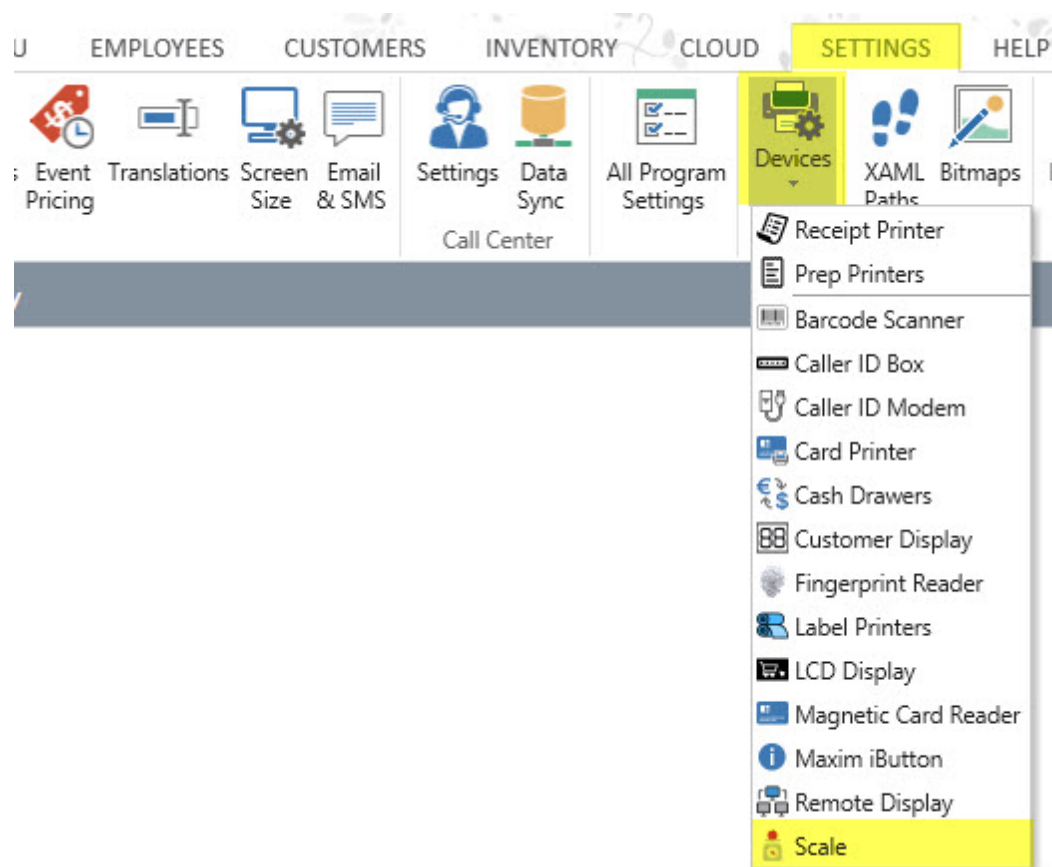


### 6.13.1 WeighTronix

AmigoPOS includes a configuration utility for the Avery Berkel / Weigh-Tronix NCI 6720. This utility can also be used on other compatible scales that utilize the Weigh-Tronix OPOS Service Object.


First install [Microsoft POS for .Net 1.14](#). In addition, AmigoPOS must be run as Administrator on Windows Vista/7/8.


Connect the scale to the pos station using a standard RS-232 DB9 cable and make a note of the COM port that the scale is connected to (a list of COM ports is shown in the Windows Control Panel Device Manager by expanding the Ports list). Open the scale settings screen in **Back Office>Settings>Peripherals>Scale** and expand the **Avery Berkel / Weigh-Tronix NCI 6720** category. Click the **Configure Scale** button to open the configuration utility.




Select the device:  
Scale

Additional Info:  
Amigo Point Of Sale supports many OPOS counter scales

 **Scale**

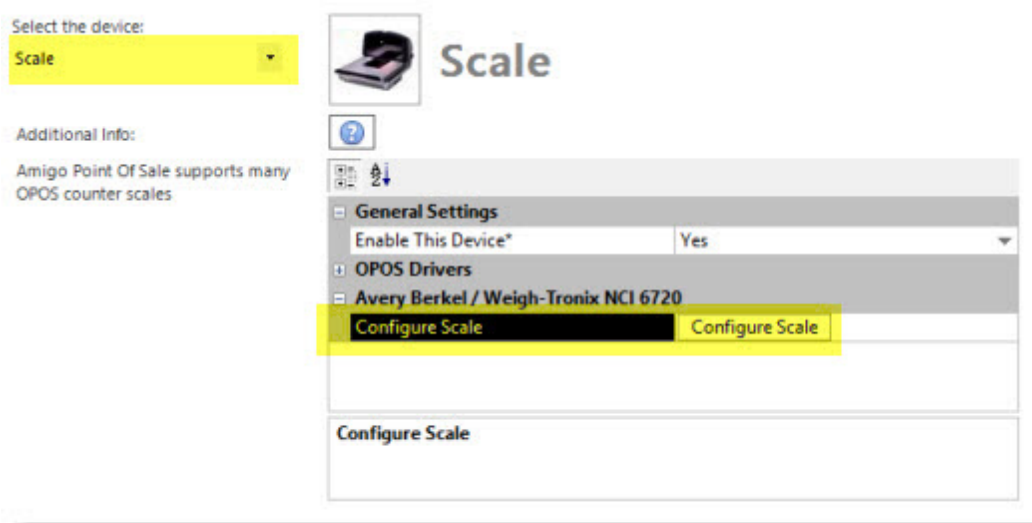




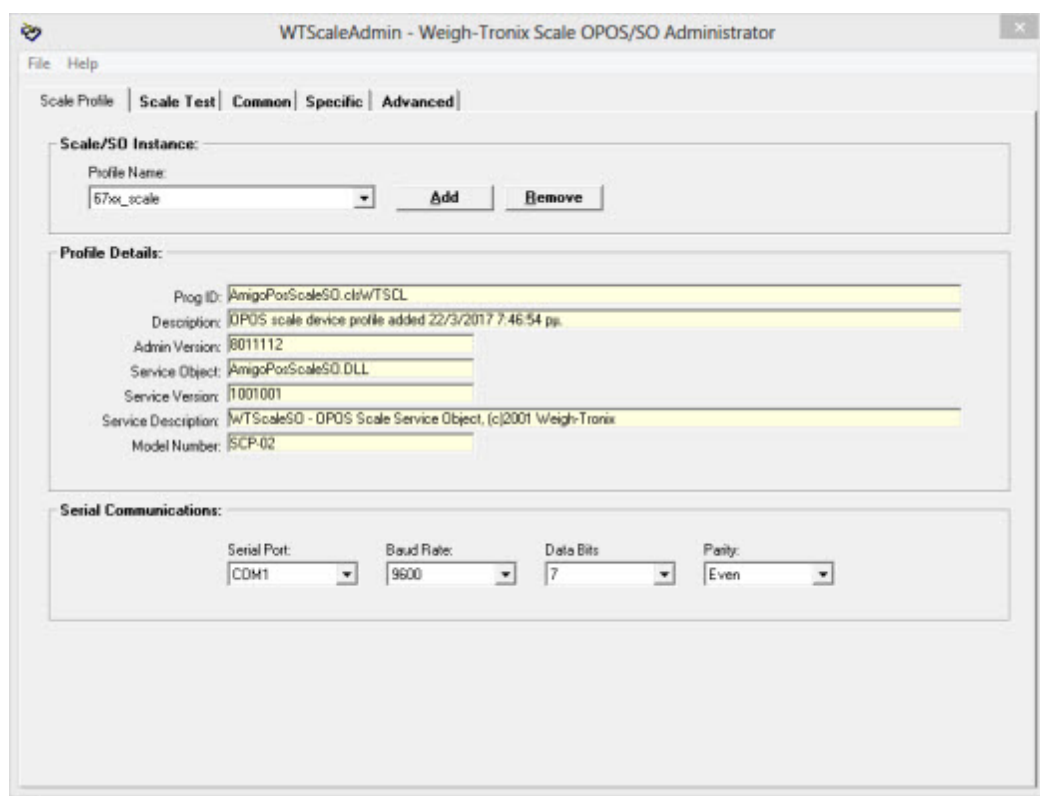
<b>General Settings</b>	
Enable This Device*	Yes
<b>OPOS Drivers</b>	
Device Name*	OPOSSCALE
OPOS Driver Timeout*	5 Seconds
<b>Avery Berkel / Weigh-Tronix NCI 6720</b>	
<b>Enable This Device*</b> Set to Yes to enable the device	

### Counter Scale Configuration

Verify that a profile name appears on the drop-down list. If a device name is not listed, click Add and enter a profile name. Enter the profile name in the **Device Name\*** field shown above.



Select the serial port number from the drop-down list, set the baud to **9600** and set the parity to **None**. Verify that the same settings are used in Windows Control Panel Device Manager.

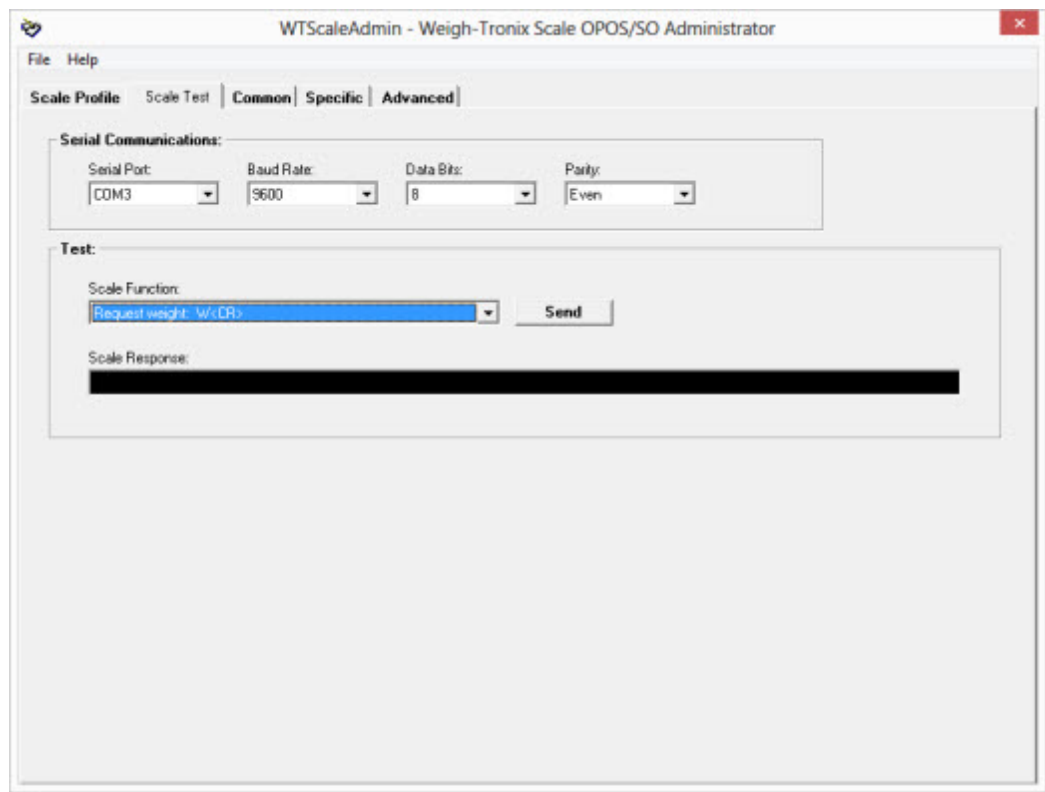


### Serial Port Settings

Click the **Read Weight** button to retrieve the weight from the scale. Any errors that occur are displayed in a message box and/or entered in the program error log. Most errors are related to one or more of the following:

- Invalid serial port configuration in Windows Control Panel > Device Manager, including baud, parity, stop bits and handshaking.
- The OPOS device is already open by another application, i.e. the order entry screen scale entry box is open or a 3rd party OPOS configuration utility is open.

- The scale is not OPOS compliant or the scale DIP switches were changed from the default settings.



**Read Weight**

Part 7

# Bar Tabs

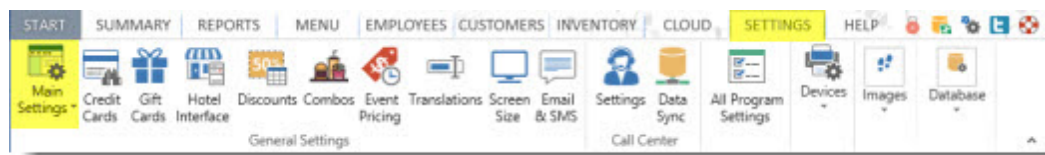


## 7 Bar Tabs

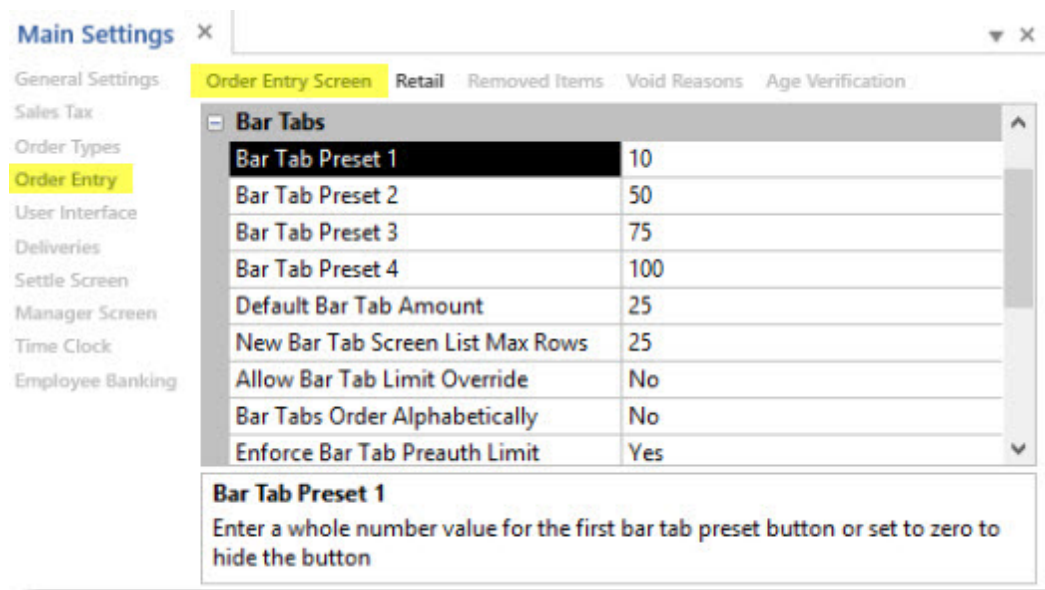
AmigoPOS includes the ability to two types of bar tabs:

1. Enter the customer name and (optionally) set a limit
2. Preauthorize the customer's credit card for a preset limit

All bar tab configuration settings are located in Back Office/Settings/ by clicking the **Order Entry** tab and then expanding the **Bar Tabs** settings. Read this entire help topic before using this feature.



Back Office/Settings/Main Settings



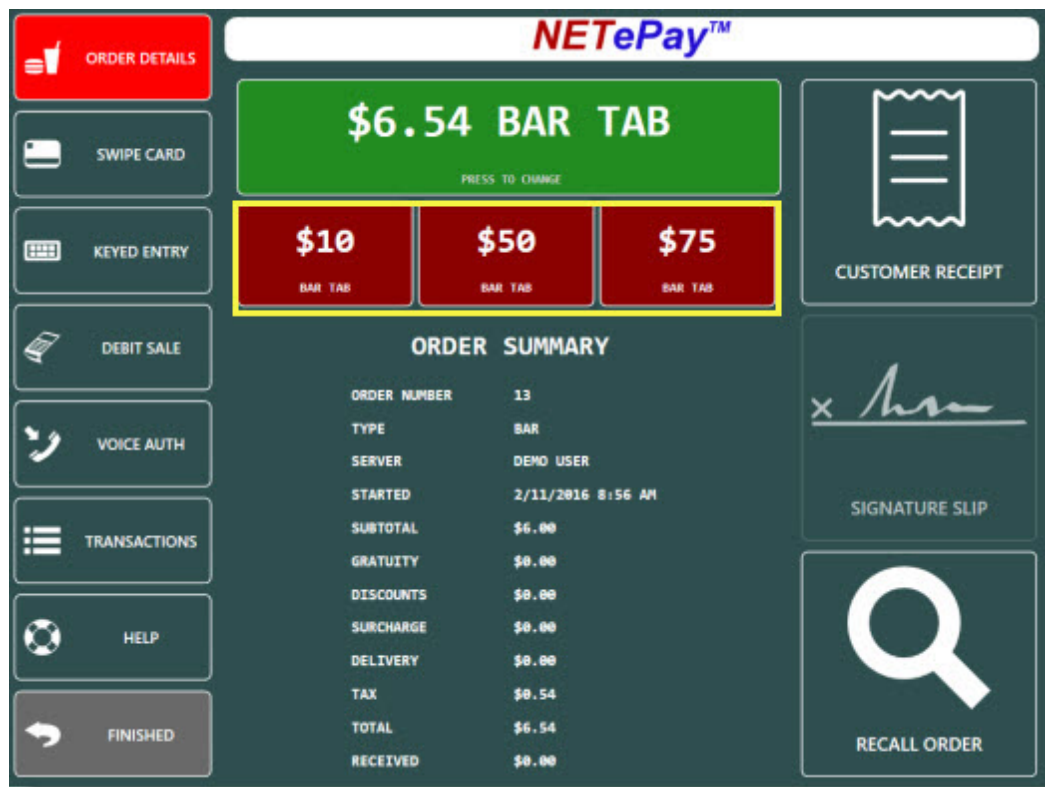
Bar Tab Settings

The following settings are shown in the Configuration > Main Settings > Order Entry Preferences:

- **Default Bar Tab Amount:** The default amount for which new bar tabs are preauthorized.
- **Bar Tab Presets (1-4):** Are used to override the default bar tab amount on the credit card screen without the need to press the green button to change the amount. Set to zero to disable.
- **New Bar Tab Screen List Max Rows:** Enter the maximum number of rows to display on the list. Use a lower number for slower workstations
- **Bar Tabs Order Alphabetically:** Set to Yes to order bar tabs alphabetically by customer name on the recall screen. Set to No to order bar tabs by time entered
- **Enforce Bar Tab Preauth Limit:** Do not allow the bar tab to exceed the preauthorized amount
- **Open Bar Tabs List Hide Open Pre Auths:** Set to Yes to hide bar tabs with open preauthorized transactions on the open bar tabs list if the balance due is zero. This setting is intended for users that do not use the bar tab preauth feature.
- **Show Bar Tab Button:** Set to No to hide the NEW TAB and TABS buttons on the order entry screen

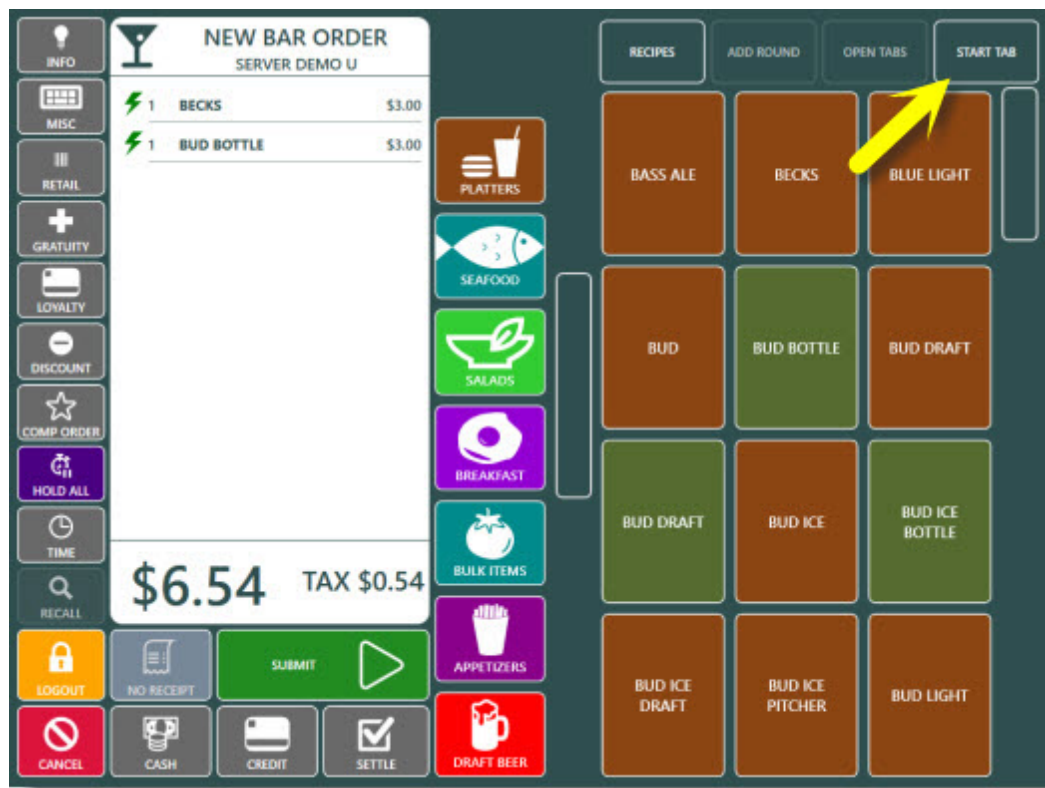
- **Show Bar Tab Pre Auth Button:** Set to No to hide the bar tab Pre Authorize button on the order entry screen

Note that bar tab presets can be set to zero to automatically hide the button. For example, only 3 of 4 bar tab presets are enabled in the image below.




**Bar Tab Presets**

To start a new bar tab, enter the initial drink order and press the START TAB button. Note that the START TAB button will remain disabled until an item is added to the order or if the current order is already a bar tab.

**START TAB Button**

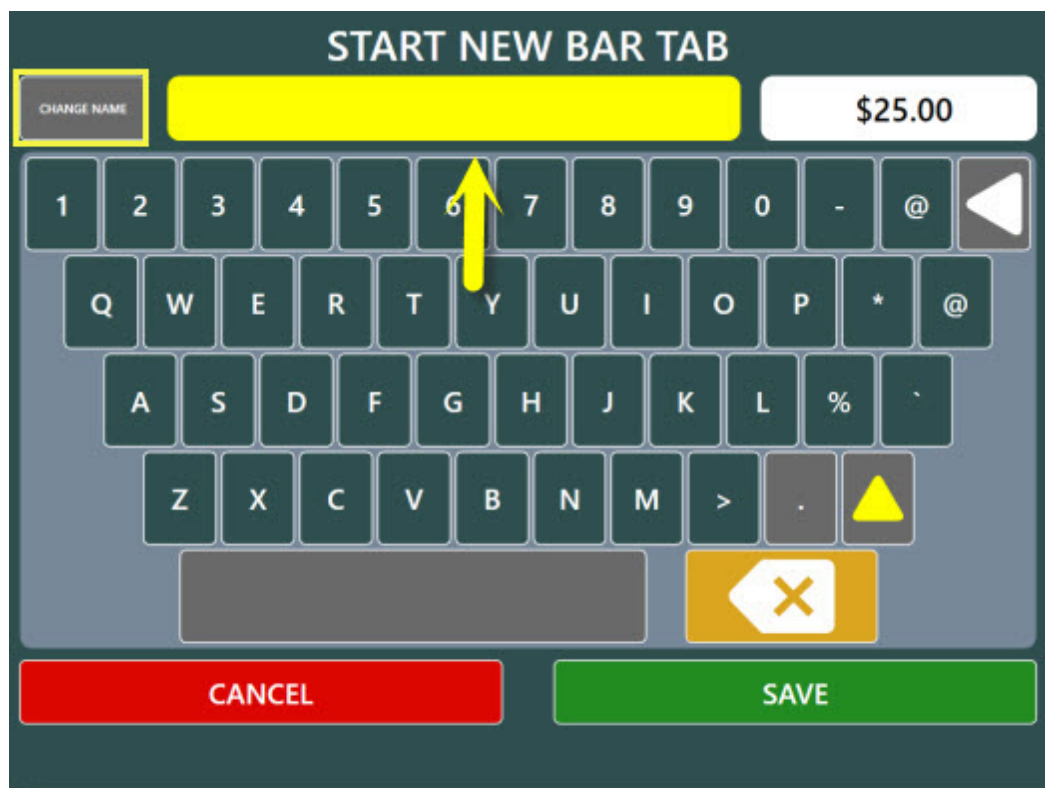
To start a generic tab where only the customer's name is entered, press the ENTER NAME button.



The screenshot displays a dark teal interface titled "START NEW BAR TAB". It features three distinct action buttons stacked vertically. The top button is dark teal with a white keyboard icon and the text "ENTER NAME". The middle button is green with a white card icon and the text "PREAUTHORIZE CARD". The bottom button is red with a white left-pointing arrow icon and the text "CANCEL".

**New Bar Tab Options**

Enter the customer's name using the on-screen keyboard, verify that the limit is correct and press SAVE. The preset bar tab limit appears on the right. A name must be entered before pressing the green **SAVE** button to start the new tab.

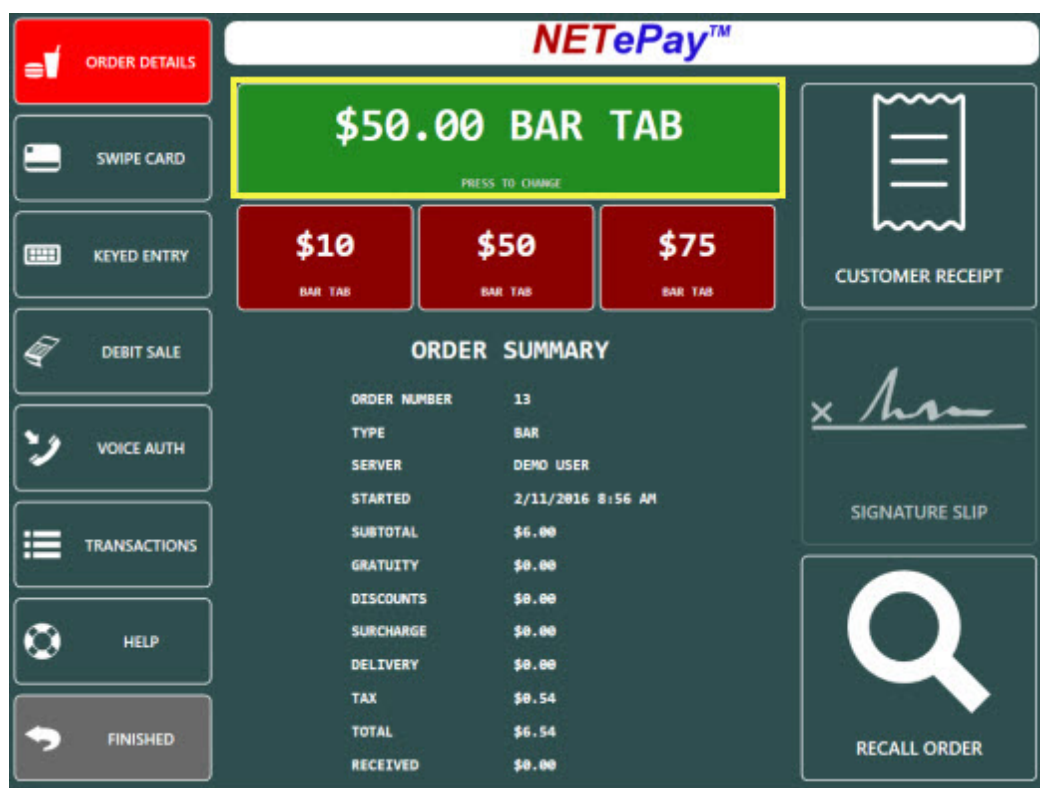


#### Enter the Bar Tab Name

Toggle **CHANGE NAME** to CHANGE LIMIT in order to change the bar tab amount, if required.

#### Enter the Bar Tab Name

To start a new bar tab using the customer's credit card, press **PREAUTHORIZE CARD**. The credit card screen will appear. Confirm that the preset limit is correct, press the Pre Authorize button and swipe the customer's card. If the transaction is successful, the new bar tab will be created using the name on the card and no further action is required. If you wish to increase the preauthorized limit on the bar tab, press the **Cancel** button followed by the green button and enter the new amount using the on-screen numeric keypad before swiping the customer's card. Review the order details and press **SWIPE CARD** at the left and swipe the card at the prompt.



#### Changing the bar tab limit before preauthorization

The preset limit will prevent the server from entering a new item on the order if the item will cause the order total to exceed the limit. This limit can be disabled for name only bar tabs, but must be enforced for pre authorized bar tabs, since the payment processor only guarantees the preauthorized amount. If the preset limit has been reached, the order should be settled and a new tab started.



**Alert informing the server that the bar tab limit cannot be exceeded**

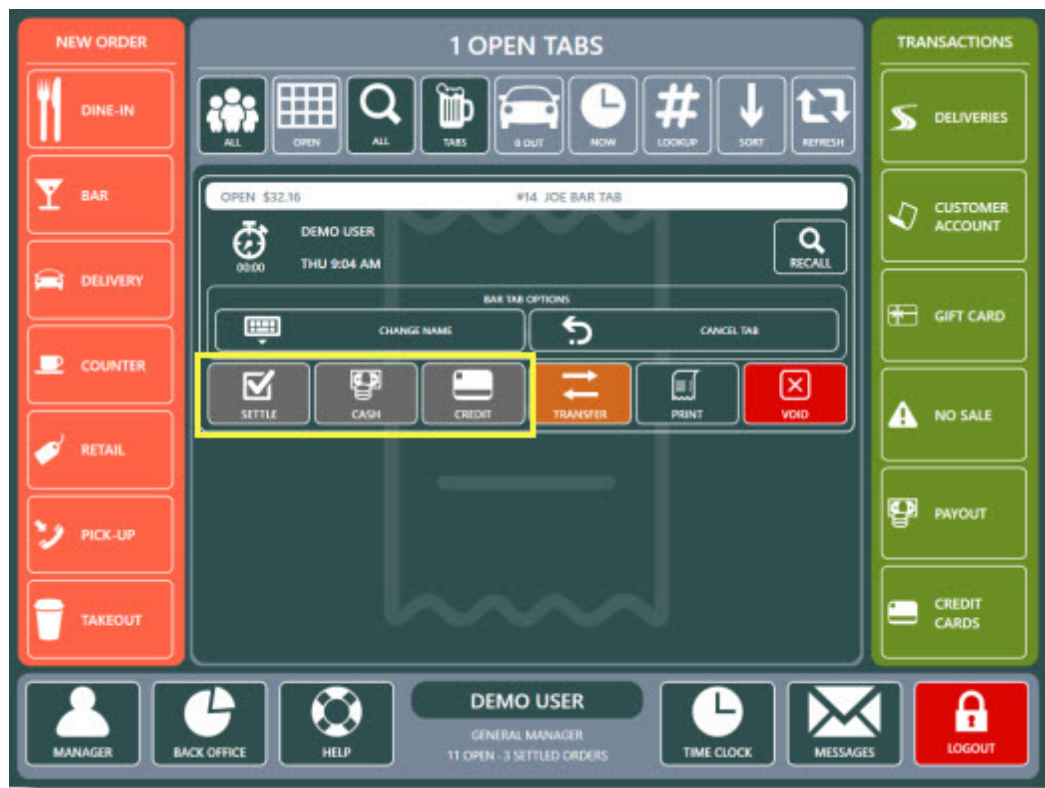
When the customer is ready to settle the bar tab, reopen the order on the order entry screen by pressing the **OPEN TABS** button.





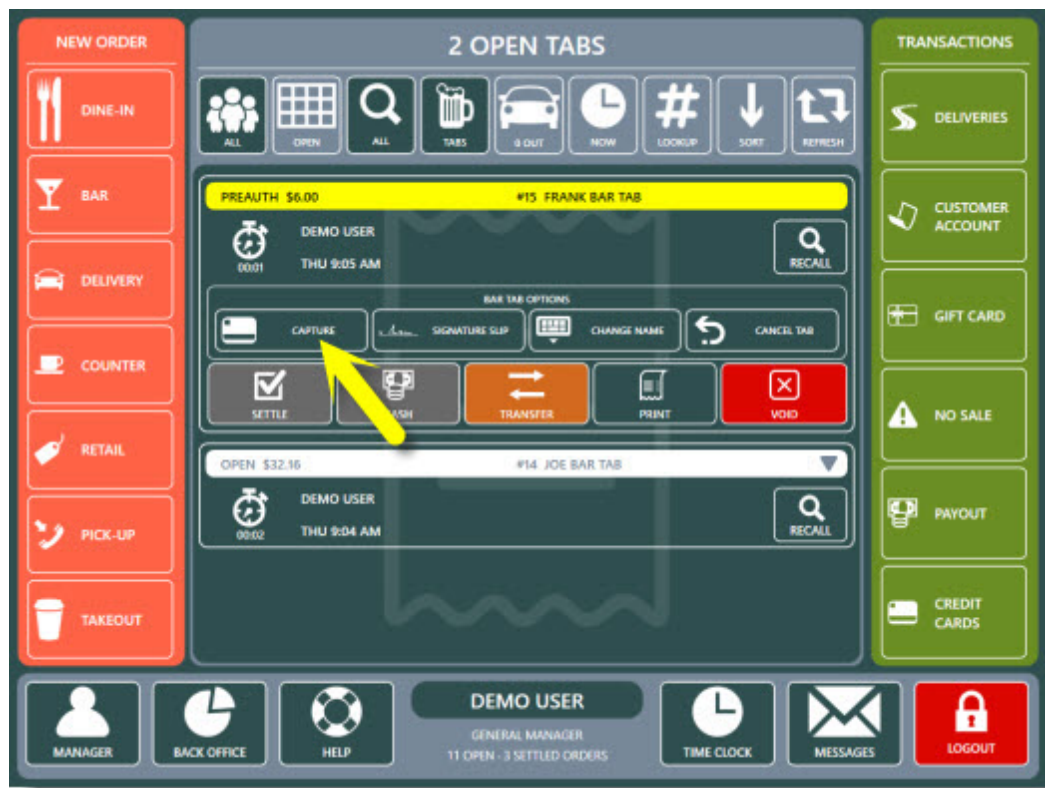
#### Closing an existing bar tab

Select the order and the payment method to continue. Pre-Authorized bar tabs can be settled by pressing the CAPTURE button.



### Closing an existing bar tab

Press the **Print Signature Slip** button. at this point the customer will enter the gratuity amount and sign the slip. This transaction must then be post-authorized (captured) by pressing the **CAPTURE** after expanding the order details on the orders list. The order will remain open until it is captured.



Printing a Signature Slip

Important Notes:

- External credit card computer users should use the first method to start a new bar tab. Preauthorized bar tabs are available only when integrated credit card processing is used.
- Regardless of which method is used to start a new bar tab, the initial drink order is submitted immediately when the **Enter Name Only** or **Preauthorize** button is pressed. Canceling the new bar tab after this point will not cancel the initial drink order.
- Bar tabs are generally used for orders that will be settled the same business day. For long-term bar tabs, it is preferable to use [Customer Accounts](#).
- Bar tabs can be started for any order type, but the bar tab functions are accessible only through the Bar menu.

Part 8

# Call Center

## 8 Call Center

### 8.1 Overview

The call center application is used to accept customer orders at a central office and route orders to the pos at each store. Each store's unique menu and order types settings are used so that different menu items, prices and surcharges can be defined at the store level. The call center application can be tested without an Ethernet caller id box by downloading the [Ethernet Emulator Deluxe](http://callerid.com) utility from callerid.com

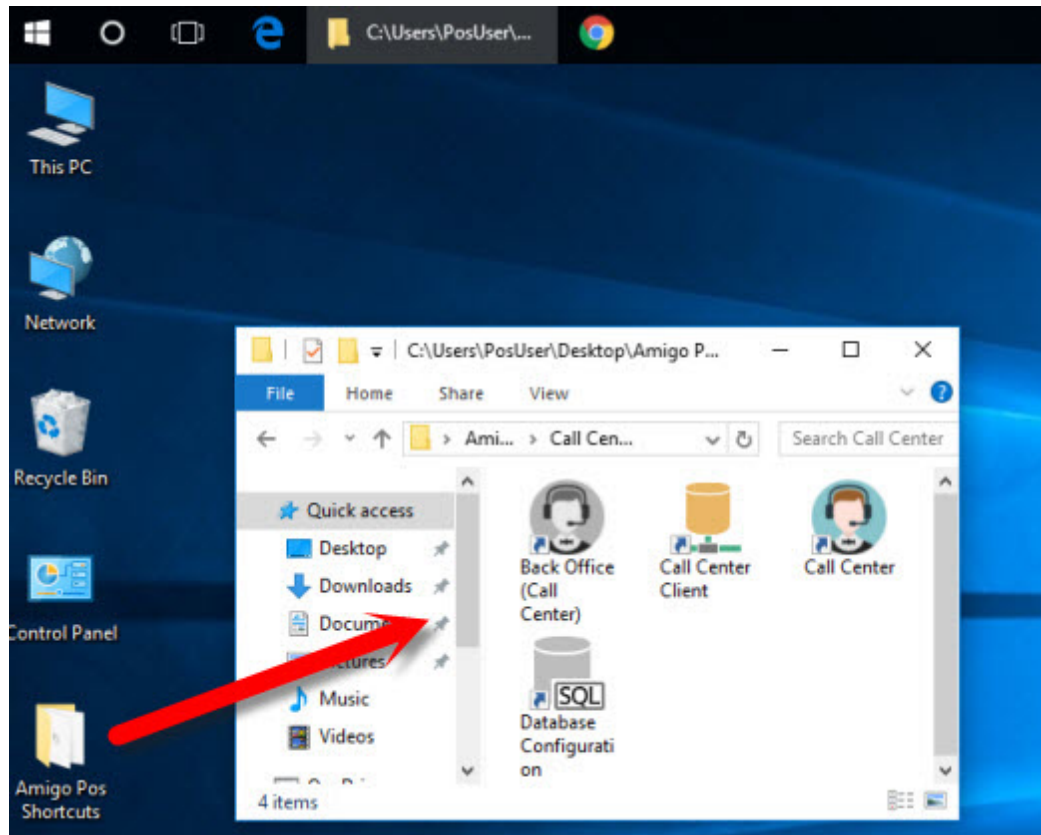


The following is a subset of features available in the current release:

- The call center application supports both a local SQL Server instance and SQL Azure database
- Direct database connection with VPN or IP for best performance
- Unlimited number of stores, each with a unique menu
- Unlimited number of phone lines with Ethernet Caller ID
- Each store's menu, order types and delivery charges are synchronized with the call center database within seconds
- Each store's menu, order types, surcharges, tax rates and delivery charges are accessible from a single user interface
- Each store's hours of operation can alert the call center operator that the store is currently closed and optionally schedule the order for a future date/time
- Orders are received automatically, with automatic prep ticket printing (and/or kitchen display system) and optional automatic customer receipt printing
- Orders can be recalled and modified at the call center with instant updates and notifications at the pos
- The call center database contains a complete customer listing for all stores
- Single-click reorder available for repeat customers
- Automatic SMS and Email alerts for orders that have not been received at the pos within a predefined threshold
- Manual phone number entry for blocked numbers

## 8.2 Installation

The call center application is installed by default with AmigoPOS and has no additional prerequisites. A broadband internet connection is required at each store and at the call center. Desktop and start menu shortcuts are located in the AmigoPOS Call Center folder.



Call Center Shortcuts

The call center application consists of 4 components:

- **Back Office (Call Center):** The call center back office application is used to add call center employees, change call center specific settings, setup devices such as the caller id box and view reports.
- **Call Center**<sup>[309]</sup>: The call center user interface is used to enter orders at the call center using a touchscreen and/or mouse & keyboard.
- **Call Center Client**<sup>[302]</sup>: The call center client is run at each store's main pos station in order to automatically receive orders
- **Database Configuration:** The stand-alone call center database management utility is used at the call center to troubleshoot database connectivity issues or to create a new call center database. The utility is also available in call center back office under settings/database setup.

## 8.3 VPN

A virtual private network (VPN) is required between the call center and each store so that the call center database server and store database server can exchange data. The call center is connected to the main pos station at each store using the virtual private network. Stores do not have to be interconnected. Stores push and pull data from the call center database. The call center does not connect to the store database.

Some network routers offer the ability to create a VPN for internet connections with a static IP address. Various online services also offer the ability to create a VPN by using a small Windows application to exchange data by using a central server. One such service is [LogMeIn Hamachi](#). The LogMeIn Hamachi subscription is available at no cost for up to 5 clients (1 call center + 4 stores).

The following describes a typical hub and spoke VPN which limits the connection between the call center and each store. Store to store communication is not required.

### Setup a network using LogMeIn Hamachi

1. Open a web browser and navigate to <https://secure.logmein.com/products/hamachi/download.aspx>.
2. Under the **Managed** account option, click **Create Account** and set up an account



#### Unmanaged

**Unmanaged mode** allows you and your friends or colleagues to set-up a VPN in a matter of minutes. However you will be limited to a mesh network configuration, and you will miss out on web-based centralized management as well. If you do decide to go this way you will be able to migrate to **managed mode** later.

**Download Now**

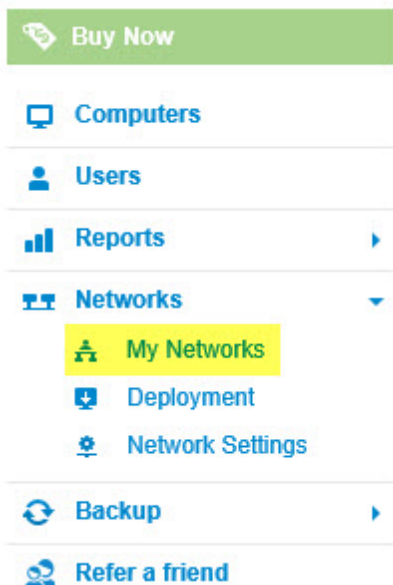


#### Managed

**Managed mode** gives you the ability to create a VPN in one of three configurations: mesh, hub and spoke or gateway. You will have the ability to deploy clients to your users by emailing them a hyperlink, and you will be able to manage and monitor your networks and their usage centrally from LogMeIn.com. You can even set up and easily manage multiple networks.

**Create Account**

3. Login to the account and click **My Networks** on the left



#### 1 Download LogMeIn Hamachi

**Download Now**

#### 2 Allow the Installer to Run

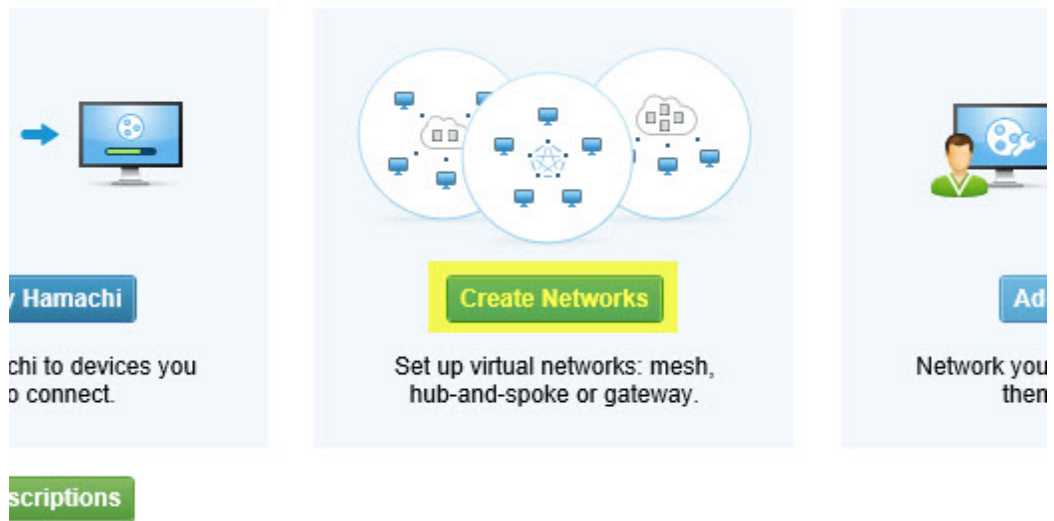
During the download and installation of the s

#### 3 Follow the setup wizard

#### 4 After installation, go to My Networks

5. Click **Create Networks**





6. Enter a name for the new network, select **Hub-and-Spoke** for network type and click **Continue**.

#### Network type and name

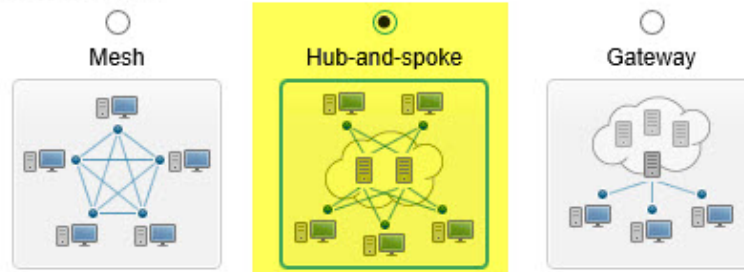
**Network name:**

CallCenterNet

**Network description (optional):**

Call Center Hub-and-Spoke Network

**Network type:**



#### Hub-and-spoke Network

This network type provides more strict control over network members in terms of who is connected to whom. Hubs (servers) are connected to everyone else, spokes (workstations) are connected only to hubs, but not to each other. It is a typical choice for simple corporate use cases, where a workstation needs connection to servers only.

**Continue**

**Cancel**

7. For increased security select the **Must be approved** option. A password can be set for additional security.



## Add Network (Step 2)

### Join Requests

- ☐ Accept automatically
- ☒ Must be approved
- ☐ Members can be added on the web only

### Network password

☒ A password is required to join this network

Network password

Confirm password

Clients requesting to join the network must enter the password. If you do not set a password, we recommend setting the Join Request behavior to **Must be approved** or **Members can be added on the web only**.

### Subscription

- ☒ Free (up to 5 members) - Never expires
- ☐ Buy Standard (up to 32 members per network) - \$29.00/year
- ☐ Buy Premium (up to 256 members per network) - \$119.00/year
- ☐ Buy Multi-network (up to 256 members, any number of networks) - \$199.00/year


**Continue**

Cancel

9. Click **Continue to Add Client**

## Add Network (Step 3)


**Network: CallCenterNet**



Choose the computers that will act as hubs in this network.

[+ Read more](#)

**Select the hubs**

 **Continue to Add Client**


Continue

Skip this

Cancel

10. If the web browser is open on the PC that will act as the call center database server, click **Install LogMeIn Hamachi on this computer**. Otherwise, click **Deploy LogMeIn Hamachi to remote computer(s)**

## Add Client



☒

**Install LogMeIn Hamachi on this computer**

(Learn more)

☐

Deploy LogMeIn Hamachi to remote computer(s)

(Learn more)

☐

Add mobile client

(Learn more)

Continue

Cancel

11. Download and run the installer to install the Hamachi application at the call center and the main pos station at each store.

### 1 Download LogMeIn Hamachi

[Download Now](#)

### 2 Allow the Installer to Run

During the download and installation of the

### 3 Follow the setup wizard

### 4 After installation, go to My Networks

12. The Hamachi application can also be deployed by clicking Networks/Deployment/Add New Link. Generate a link for the call center and each store.

[Buy Now](#)

- Computers
- Users
- Reports
- Networks
  - My Networks
  - Deployment**
  - Network Settings
- Backup
- Refer a friend

## Add Client

### Deploy LogMeIn Hamachi to remote computer(s) (Step 1 of 2)

**Note:** You are about to create and send a customized link that each rec

Description (for your reference only)

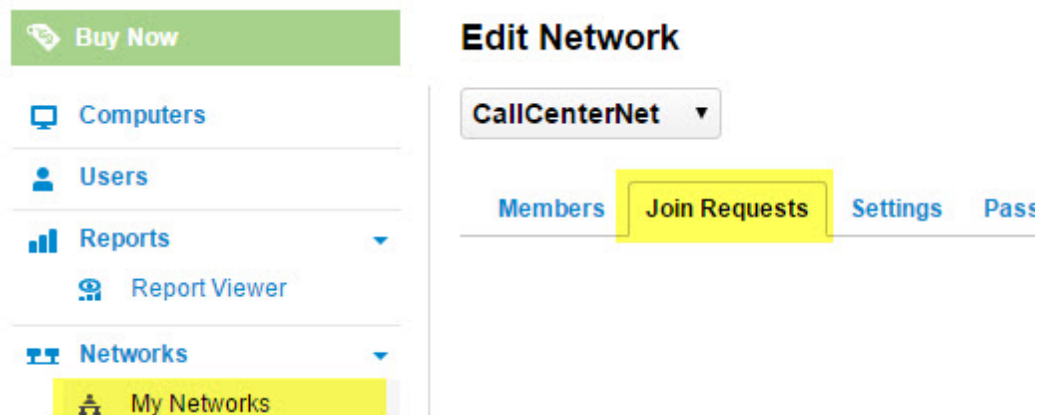
Maximum number of remote installations

Expiration

☐ Networks
 ☒ **CallCenterNet**

[Continue](#)
[Cancel](#)

13. Start Hamachi at the call center and each store to verify connectivity. Return to the Hamachi Management Portal and click **My Networks**. Click the **Edit** link at the right and select the **Join Requests** tab to approve the call center client and each store's client.



14. Click **My Networks** and click the **Edit** link at the right. Click **Add/Remove Members**. Set the call center client as the hub and each store as a spoke. Click **Save**.

### Edit Network

CallCenterNet ▼

Members Join Requests Settings Password Subscription Delete

ID	Name	Type	Description
321-165-809	CallCenterNet	Hub-and-spoke	Call Center Hub-and-Spoke Network

*Use the ID when joining this network from the Hamachi client.*

[View current members](#) | **Add/Remove members**

Name	Hub	Spoke	Client ID	Tag
<input checked="" type="checkbox"/> CALLCENTER	<input checked="" type="radio"/>	<input type="radio"/>	191-030-764	
<input checked="" type="checkbox"/> STORE1	<input type="radio"/>	<input checked="" type="radio"/>	191-031-854	

**Save** Cancel

15. Network setup is complete. Note the IP address that appears at the top of the call center Hamachi client. The IP address is used as the server name when setting the [database connection](#)<sup>302</sup> parameters at each store.

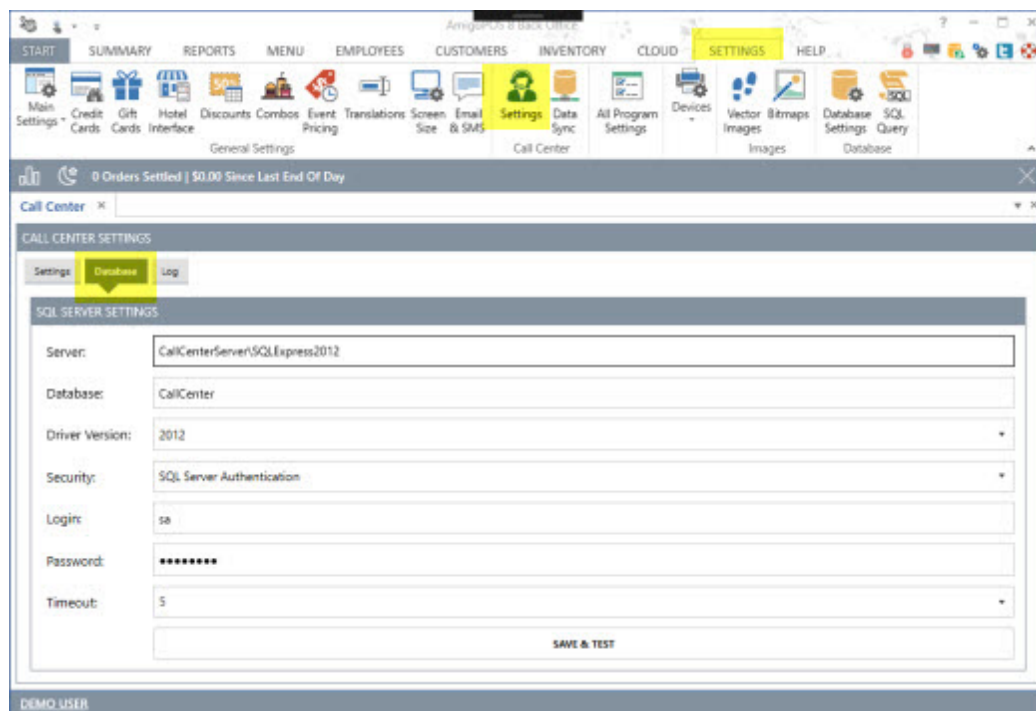


## 8.4 Pos Station Setup

Create a [virtual private network](#) between the call center and the main pos station at each restaurant. This can be accomplished by using the network routers when static IP addresses are in use, or by using 3rd party applications such as [LogMeIn Hamachi](#).

Complete the following steps at the pos station that will be used to receive new orders. For best performance, the main pos station where the database server is installed should be used.

1. Set the call center database connection parameters. The settings are accessible in both back office\settings\call center and in the call center client.



**Call Center Database Settings**

2. Set the call center preferences. The following settings are available:

- **Program Startup:** Specify whether to automatically start the call center client at Windows boot
- **Update Interval:** Select the interval in seconds to check for new orders and messages
- **Default User:** Select the default user to use at the store when saving new orders
- **Auto-Print Receipt:** Specify whether to print a receipt when a new order or order update is received
- **Store ID:** A unique id assigned to the local store (maximum 36 digits).
- **Store Name:** A unique name for the store that will appear on the call center user interface store selection list
- **Address:** A short description of the store's address
- **Phone:** The store's phone number
- **Enforce Store Hours:** Specify whether to limit order acceptance to the store's open/close time and day as defined below
- **Open Time:** The store's open time
- **Close Time:** The store's close time
- **Open Monday -> Sunday:** Specify whether the store is open for each weekday

**AMIGOPOS CALL CENTER CLIENT**

Settings About

☐ Start automatically when Windows starts

☒ Minimize to system tray at startup

**General Settings**

Receive Orders*	Yes
Phone Lines*	4
Update Interval*	10
Default User*	DEMO USER
Auto-Print Receipt*	Yes

**Store Information**

Store ID*	82bcc444-5a29-4fac-8475-45a6d73b5964
Store Name*	Store 1
Address*	Main Street
Phone*	111-222-3333

**Store Hours**

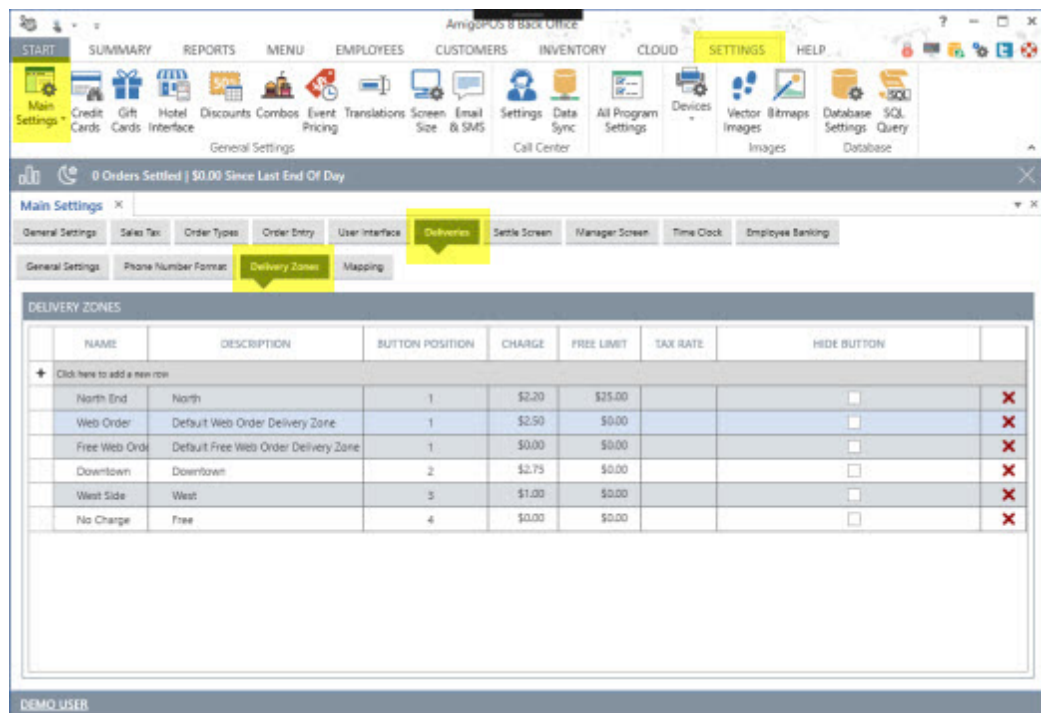
Receive Orders\*

Set to Yes to receive call center orders at this pos station

Last checked for new orders at 12:20:44 PM

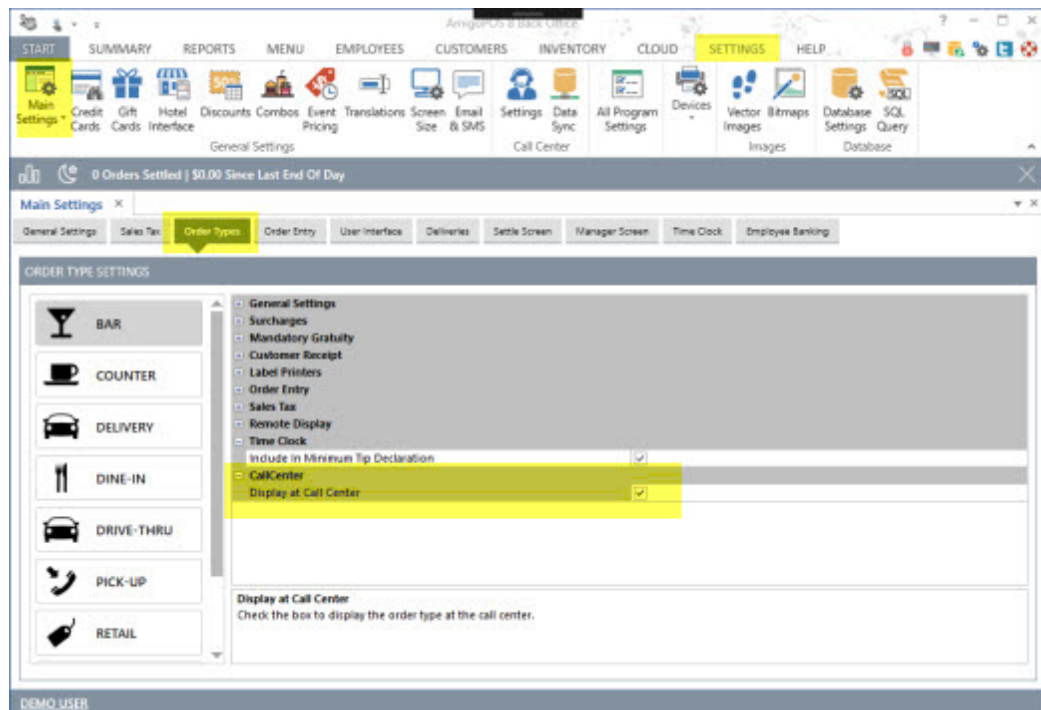
**Call Center General Settings**

3. Verify that at least one [delivery zone](#)<sup>655</sup> is defined, regardless of whether or not deliveries are used. Since all call center orders require a customer phone number, at least one delivery zone must be defined.



New Delivery Zone Entry

4. Specify the [order type\(s\)](#)<sup>967</sup> that will appear on the call center screen. All local order type settings including gratuities and surcharges are used at the call center.



Order Types Settings

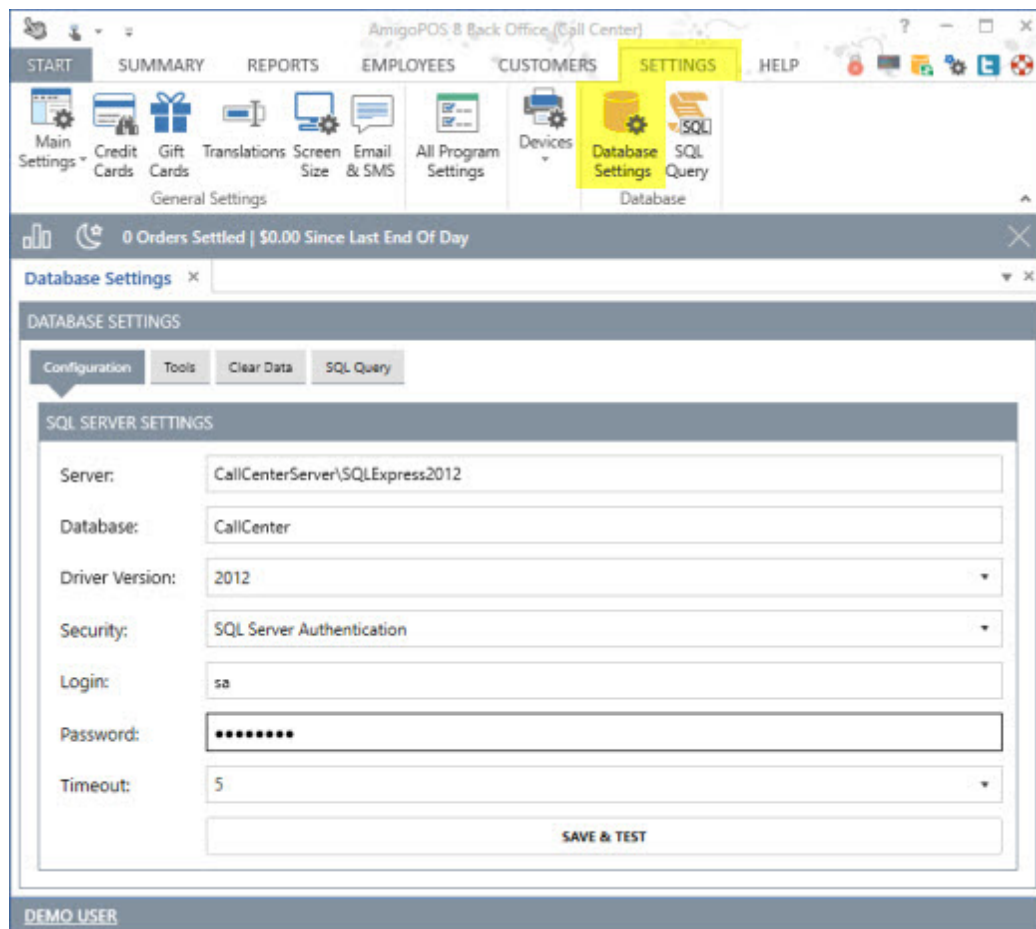
## 8.5 Call Center Setup

Complete the steps below before attempting to run the call center:

- [Install the Database](#) <sup>305</sup>
- [Add Users](#) <sup>305</sup>
- [Configure Prep Printer Settings](#) <sup>306</sup>
- [Enable the Caller ID Box](#) <sup>307</sup>
- [Set the Number of Phone Lines](#) <sup>308</sup>

### Install the Database

Run the database configuration utility to set the connection parameters to the local call center database server. Testing the server connection will result in an invalid login error because the database does not yet exist.

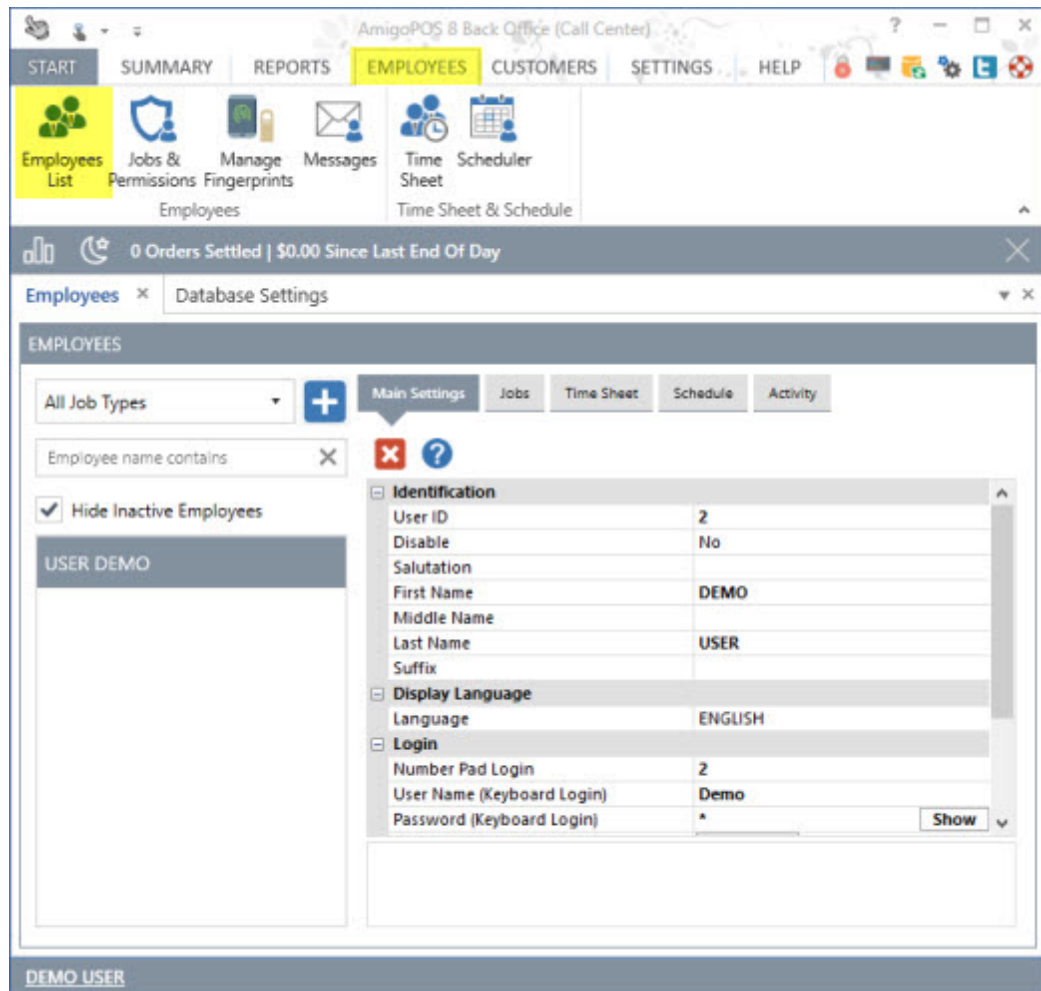


The call center database is based on the in-store pos database but includes additional fields to support multiple menus and other store settings. Install AmigoPOS with SQL Server Express at any call center PC and reboot. Open the call database configuration utility and click the New Database button. Enter a name for the new database and click OK. Allow up to a minute to complete the process.

### Add Users

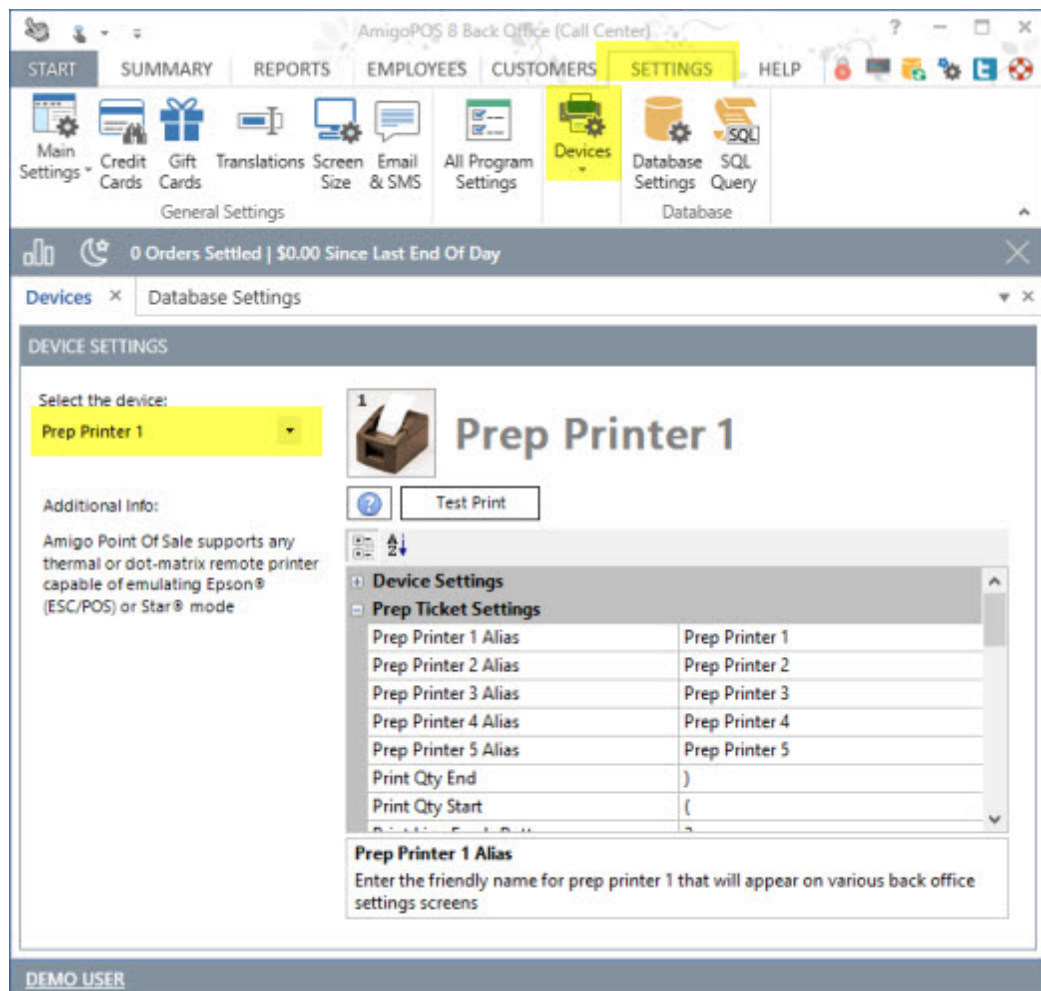
Open Back Office (Call Center) and navigate to Employees/Employees list. Create a new user for each employee and set appropriate [permissions](#) <sup>698</sup>.





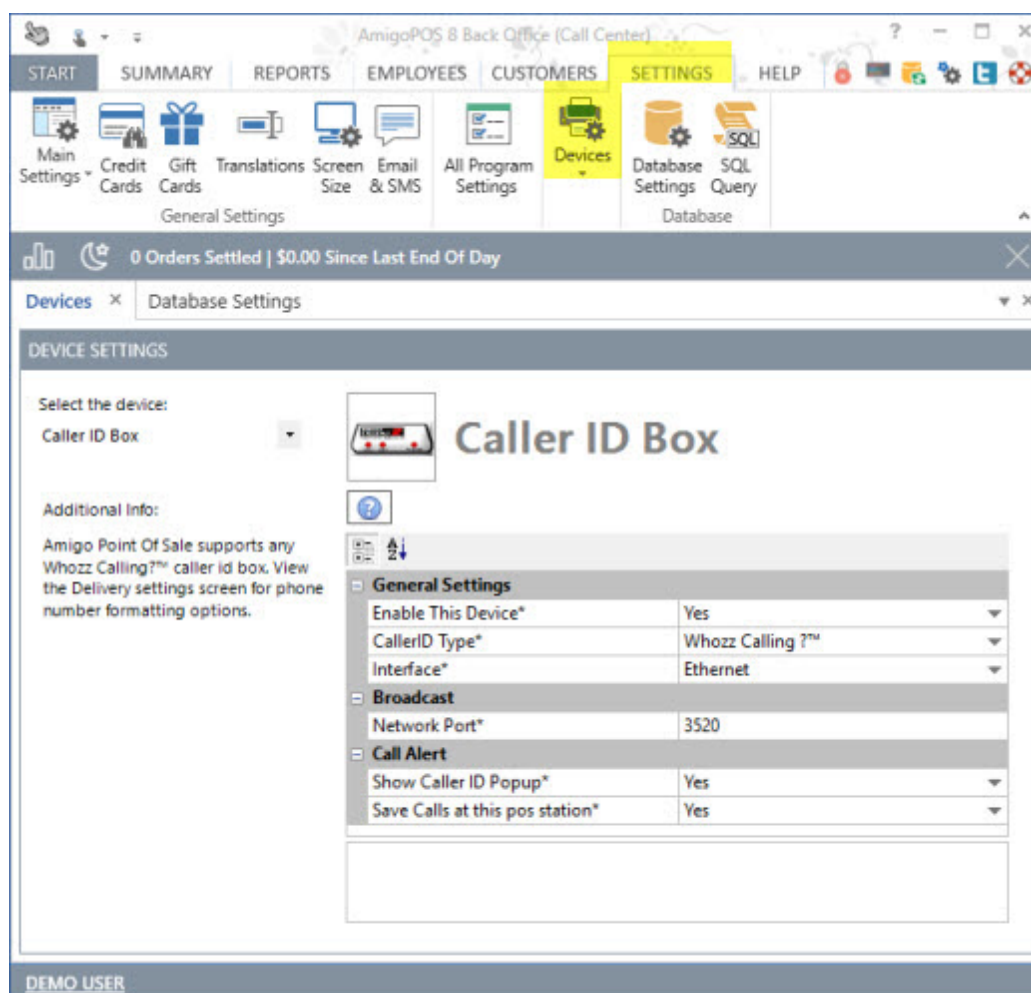
### Configure Prep Printer Settings

Prep tickets for all stores are generated using the settings specified in **Back Office>Settings>Peripherals>Prep Printer**. Enable a prep printer and adjust the settings. All settings except for Device Settings are shared and not customizable per store. Device settings are ignored since prep tickets do not print at the call center.



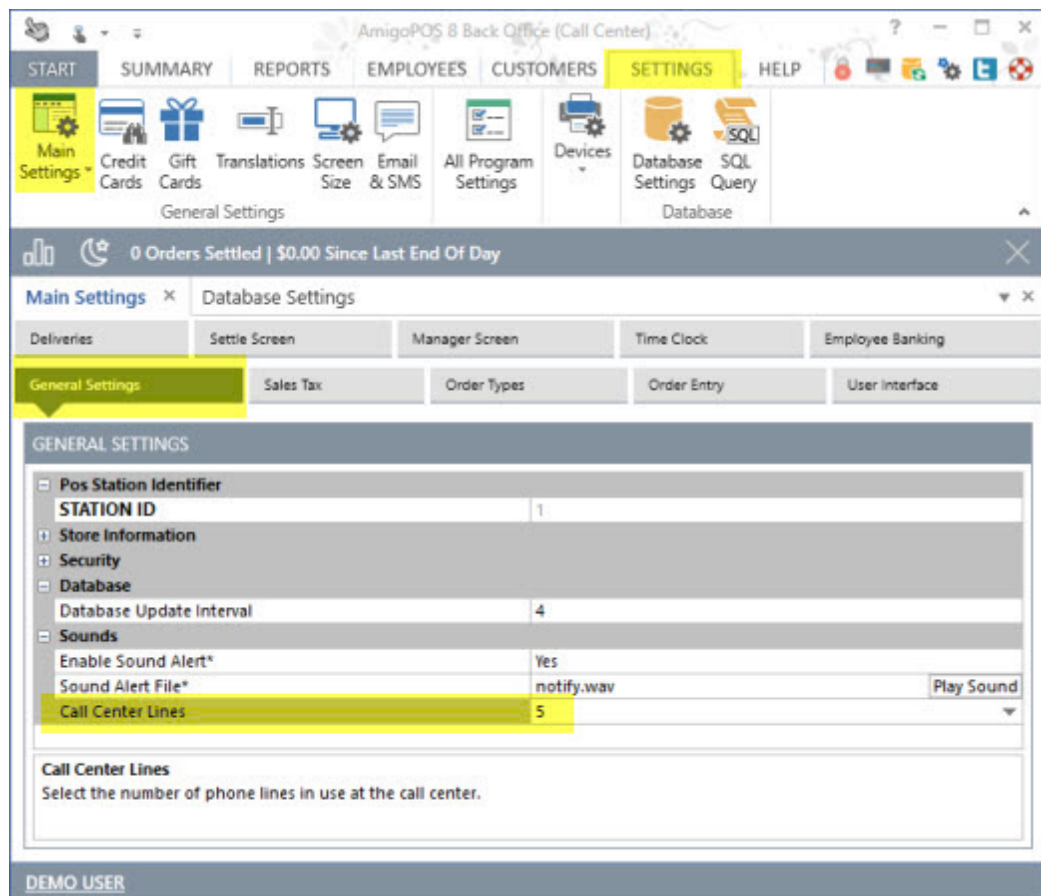
### Enable the Caller ID Box

The call center works with the Ethernet caller id box available at [callerid.com](http://callerid.com). Additional options such as 3CX are in development. For custom implementations such as a PBX, set the PBX to broadcast the call data in the format used by callerid.com. Refer to the [source code](#) examples for additional information.



### Set the Number of Phone Lines

Set the number of phone lines in **Back Office>Settings>Main Settings>General Settings**.



## 8.6 Usage

Order entry at the call center is virtually identical to order entry at the pos. After logging in, select a store and incoming call line or click MANUAL ENTRY to enter the customer's phone number. Select the order type to start a new order. Note that the order type buttons remain disabled until a customer is selected.



Unknown callers are indicated by a yellow icon. The customer information screen is displayed whenever an unknown caller is selected.



After selecting a customer, the customer information is displayed and the order type buttons are enabled.

Pos Call Center

SELECT A STORE

**STORE 1**  
1 MAIN STREET  
111-222-3333  
2:22 PM - 2:44 PM

**STORE 2**  
2 MAIN STREET  
111-222-3333  
OPEN 24 HOURS

**STORE 3**  
3 MAIN STREET  
111-222-3333  
OPEN 24 HOURS

**STORE 4**  
4 MAIN STREET  
111-222-3333  
OPEN 24 HOURS

**STORE 5**  
5 MAIN STREET  
111-222-3333  
OPEN 24 HOURS

CUSTOMER DETAILS

PHONE 444-5555

NAME Customer New

ADDRESS NO ADDRESS ENTERED

CUSTOMER SINCE 11/21/2015

LAST ORDER 11/25/2015

TOTAL SPENT \$47.52

CHANGE CUSTOMER EDIT CUSTOMER

DINE-IN

BAR

DELIVERY

COUNTER

RETAIL

PICK-UP

TAKEOUT

SEND MESSAGE

RECALL

LOGOUT

The customer's name, phone number and store selection are displayed on the order entry screen.

Pos Call Center

INFO

MISC

RETAIL

GRATUITY

LOYALTY

DISCOUNT

TIME

LOGOUT

CANCEL

NO RECEIPT

**NEW COUNTER ORDER**

Customer New 444-5555  
STORE 1

1	COFFEE	\$1.25
1	SMALL CH & PEP	\$8.50
	- CHEESE	+ \$2.50
	- CHICKEN	+ \$2.50

**\$14.75**

SUBMIT

SELECT MODIFIERS FOR SMALL CH & PEP

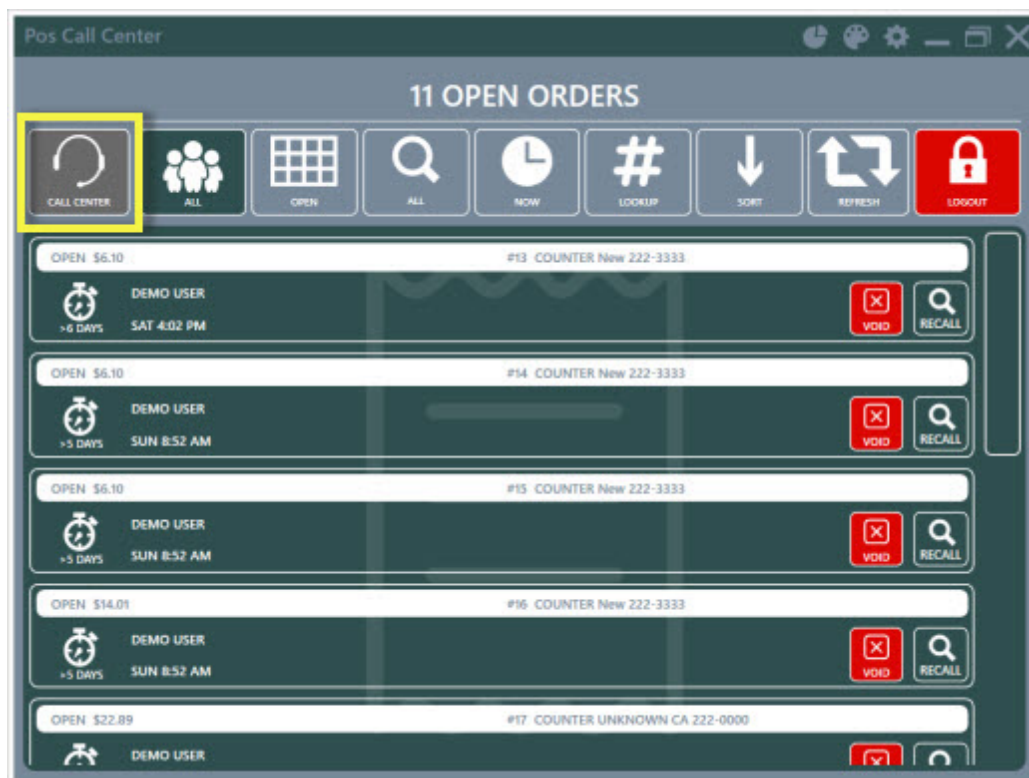
SMALL PIZZA TOPPINGS

TOP BOTTOM 2X 3X NO

ANCHOVIES	CHEESE	GREEN PEPPER	PIZZA
ARTICHOKE	CHICKEN	HAM	RED PEPPER
AVOCADO	CHILI PEPPERS	HAMBURGER	SAUSAGE
BACON	EGGPLANT	MUSHROOMS	SHRIMP
BLACK OLIVES	GARLIC	ONIONS	STEAK
BROCCOLI	GREEN OLIVES	PEPPERONI	TOMATO



Previous orders can be accessed by pressing the RECALL button. Orders can be recalled or voided and the store is notified of changes in order status. Press the CALL CENTER button to return to the main screen.



The control panel at the top left provides access to back office, the theme editor and the database configuration utility. The back office button is visible only for logged in users with back office permission enabled.





Part 9

# Cloud Service

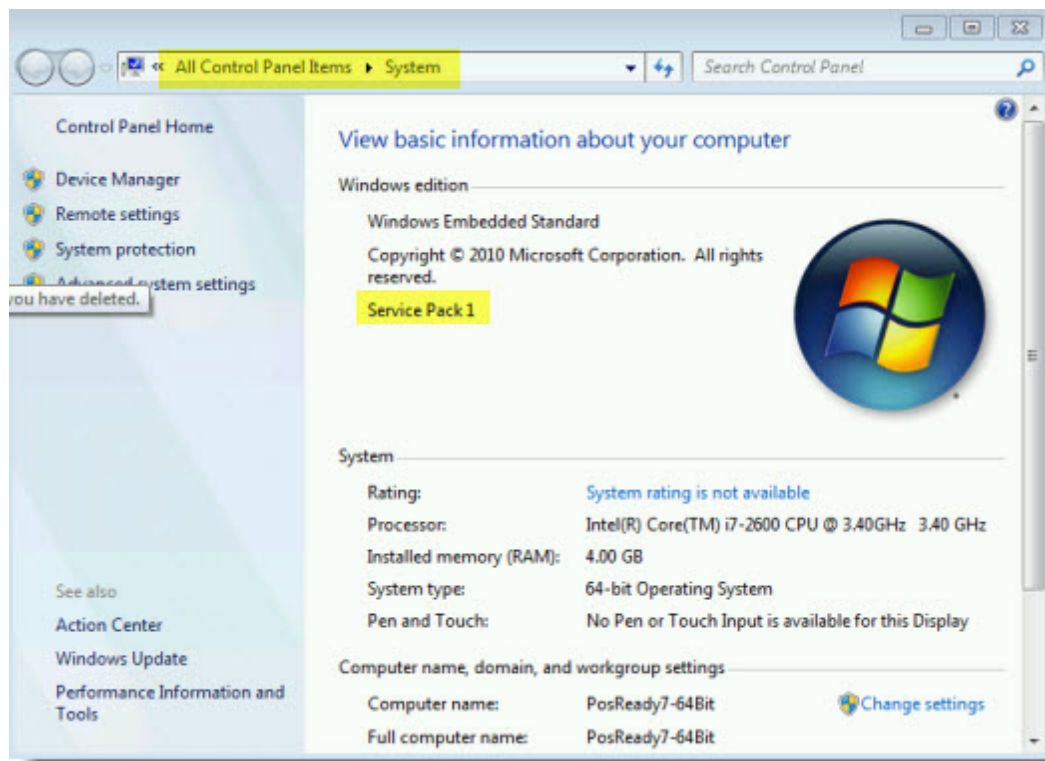
## 9 Cloud Service

### 9.1 Prerequisites

The AmigoPOS Cloud Service client requires Windows 7 SP1 or later. In addition, Windows 7 users must install .Net Framework 4.5.2 (Windows 8/8.1/10 includes .Net 4.5). For best reliability and performance, [Microsoft .Net 4.6.2](#) is recommended.

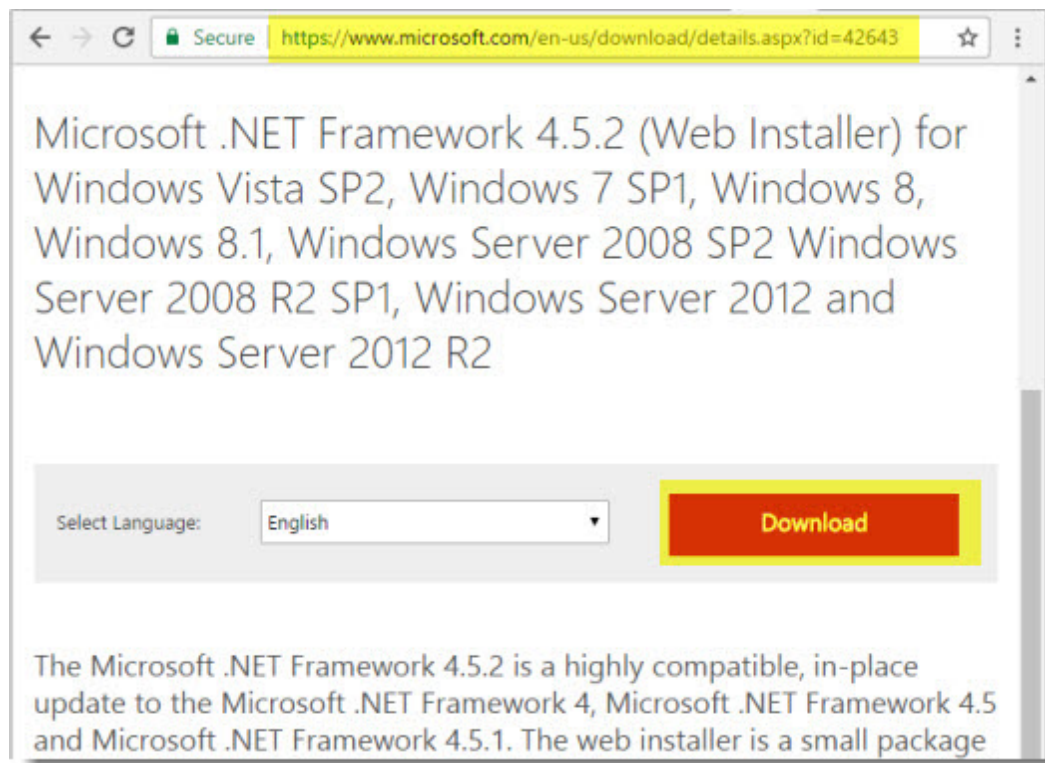
#### Windows 7 SP1

Verify that Service Pack 1 or later is installed in Windows Control Panel/System. If not, run Windows Update and reboot.



#### Windows 7 Service Pack 1 (SP1)

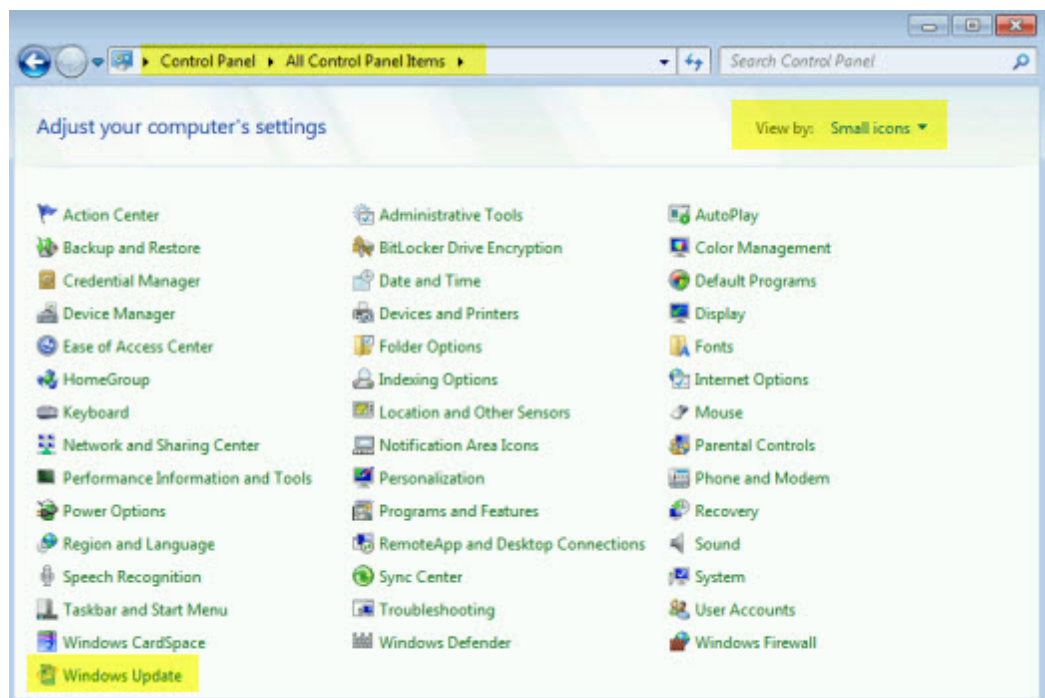
Download the .Net 4.6.2 web installer from <https://www.microsoft.com/en-us/download/details.aspx?id=53345> and run the installer. Reboot when prompted and run Windows Update to complete the installation.



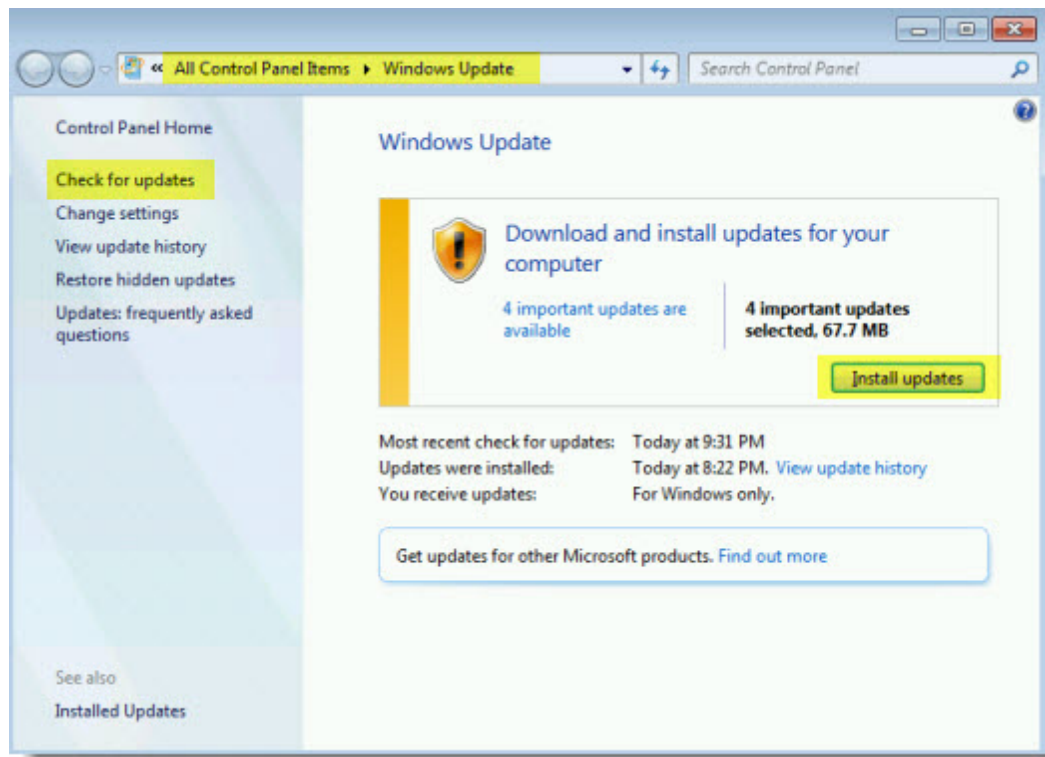
#### **.Net 4.5.2 Web Installer**

#### **Windows 7/8/8.1/10**

Run Control Panel/Windows Update to ensure that the latest security patches and fixes are installed.



#### **Windows Control Panel**



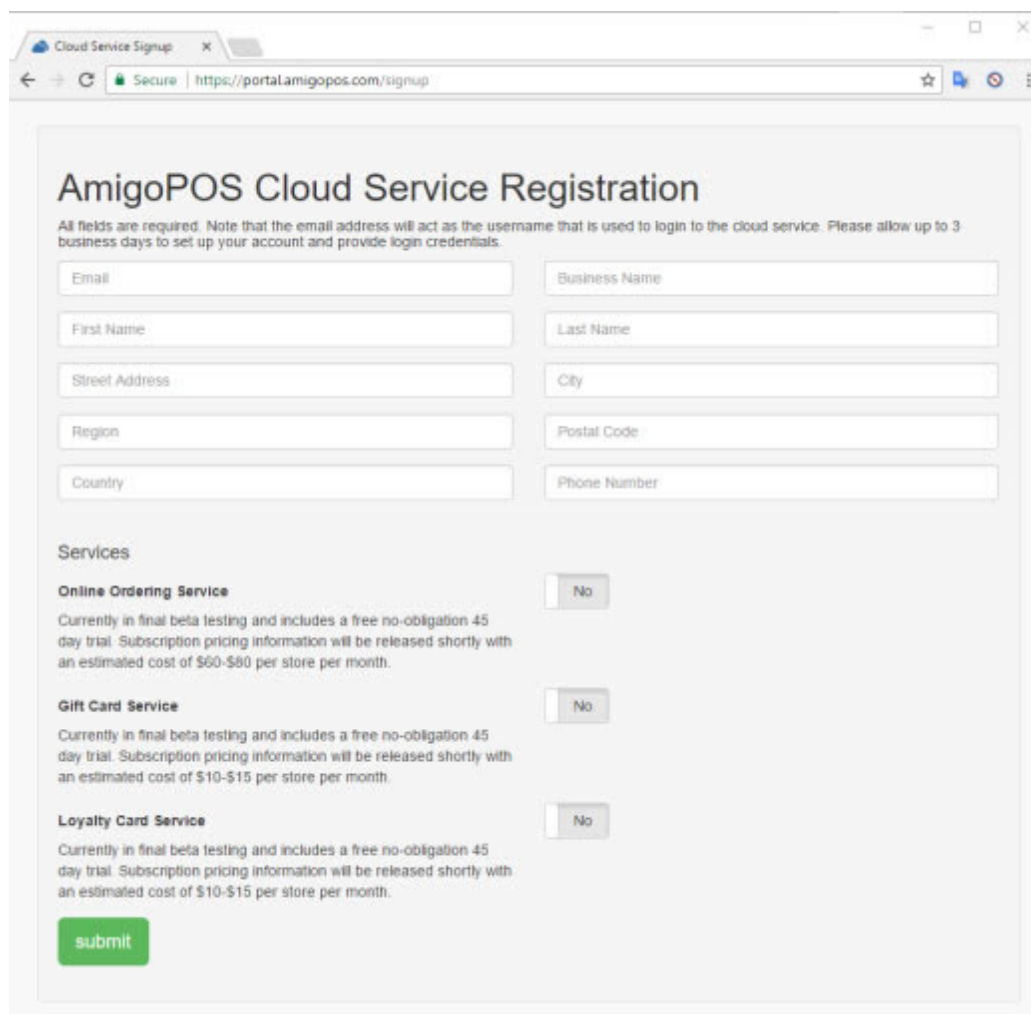
**Windows Update**

## 9.2 Settings

Complete the following steps to configure AmigoPOS to use the online ordering, gift card and/or loyalty card cloud services.

### **Subscription**

Complete the subscription form at <https://portal.amigopos.com/signup> to obtain the login url and login credentials for the cloud service before continuing.



The screenshot shows a web browser window with the address bar displaying "https://portal.amigopos.com/signup". The page title is "Cloud Service Signup". The main heading is "AmigoPOS Cloud Service Registration". Below the heading, a note states: "All fields are required. Note that the email address will act as the username that is used to login to the cloud service. Please allow up to 3 business days to set up your account and provide login credentials." The form consists of two columns of input fields: Email, Business Name, First Name, Last Name, Street Address, City, Region, Postal Code, Country, and Phone Number. Below these fields is a section titled "Services" with three options: "Online Ordering Service", "Gift Card Service", and "Loyalty Card Service". Each option has a description and a "No" button. At the bottom of the form is a green "submit" button.

Cloud Service Signup X

Secure | https://portal.amigopos.com/signup

## AmigoPOS Cloud Service Registration

All fields are required. Note that the email address will act as the username that is used to login to the cloud service. Please allow up to 3 business days to set up your account and provide login credentials.

Email Business Name

First Name Last Name

Street Address City

Region Postal Code

Country Phone Number

### Services

**Online Ordering Service**   
Currently in final beta testing and includes a free no-obligation 45 day trial. Subscription pricing information will be released shortly with an estimated cost of \$60-\$80 per store per month.

**Gift Card Service**   
Currently in final beta testing and includes a free no-obligation 45 day trial. Subscription pricing information will be released shortly with an estimated cost of \$10-\$15 per store per month.

**Loyalty Card Service**   
Currently in final beta testing and includes a free no-obligation 45 day trial. Subscription pricing information will be released shortly with an estimated cost of \$10-\$15 per store per month.

<https://portal.amigopos.com/signup>

### Setup

All settings are stored in the database and can be configured at any pos station or office PC. First login to the cloud portal with the credentials provided in the cloud subscription confirmation email. Click the Account/Subscription link and verify that the subscription information is accurate. Locate the store information and click the download link to download the settings in an xml file.

AmigoPOS Cloud Portal BETA

Logged in as test123@gmail.com

Search...

Home

Online Ordering

Gift & Loyalty

Account

**Subscription**

Profile

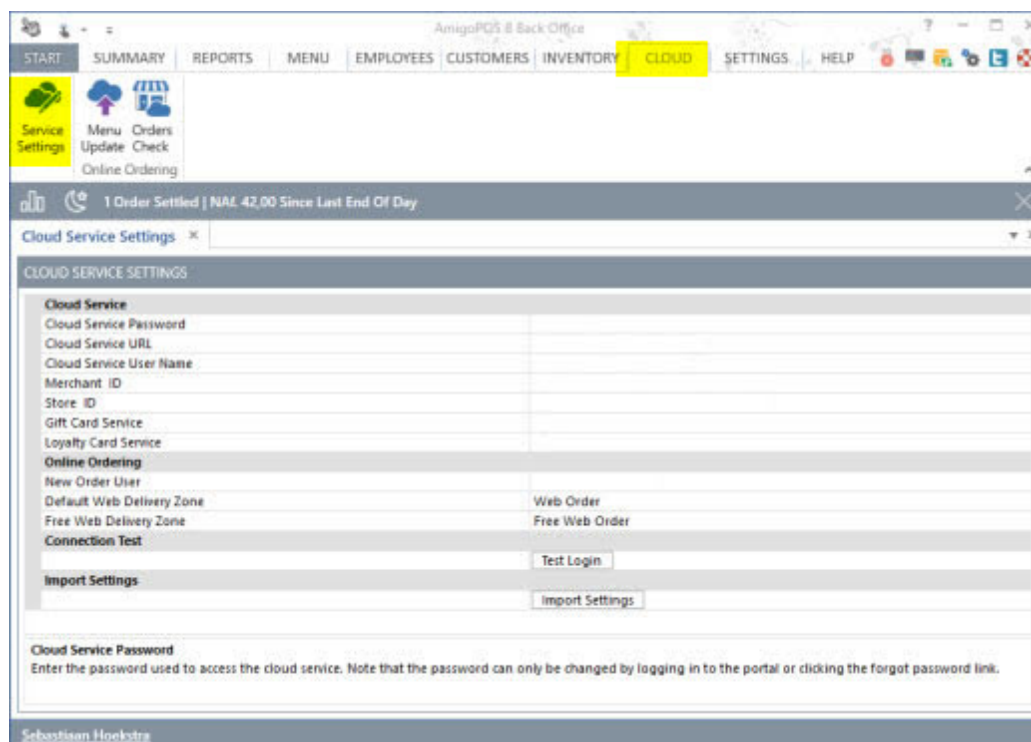
## Subscription Info

Merchant ID	e2edaa79-953d-4399-869e-00fd64343720
Login	test123@gmail.com
Start Date	6/1/2017 12:00:00 AM
Trial Expires	8/20/2017 12:00:00 AM
Current Balance Due	\$0.00
Gift Card Service	<input checked="" type="checkbox"/> On
Gift Cards Cost Per Store	\$0.00
Loyalty Card Service	<input checked="" type="checkbox"/> On
Loyalty Cards Cost Per Store	\$0.00
Online Ordering Store Count	1
Online Ordering Cost Per Store	\$60.00

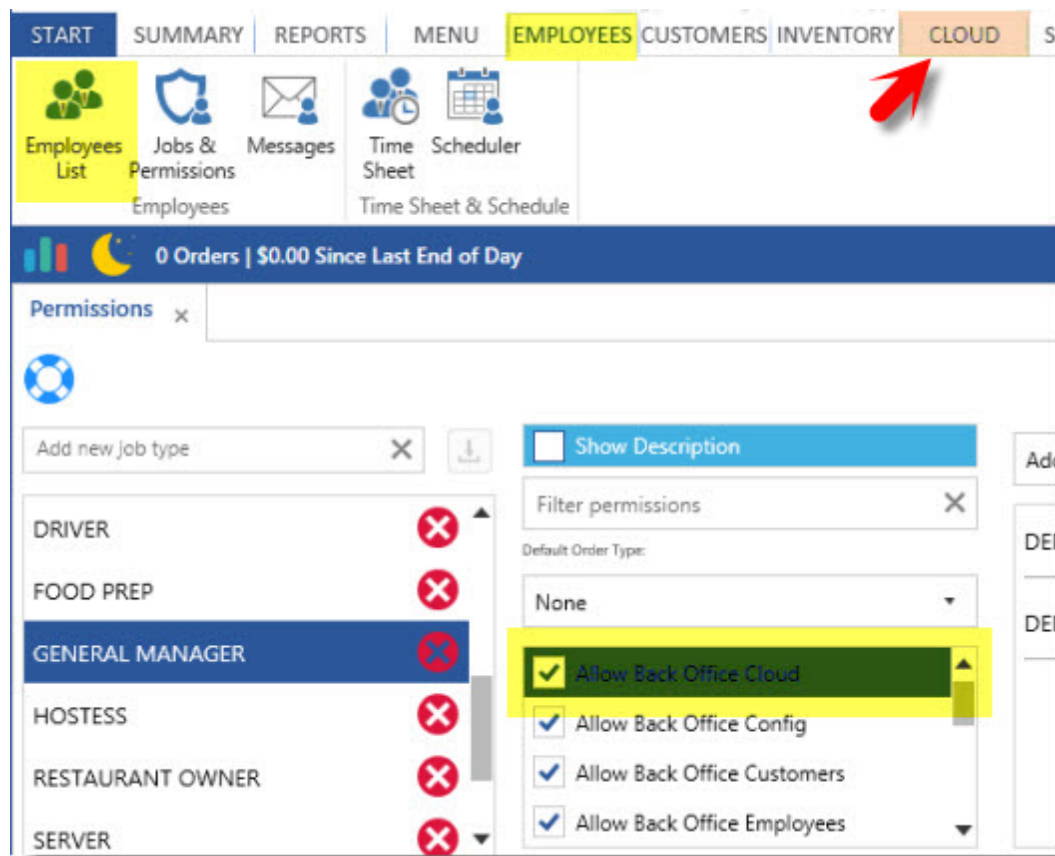
### Stores

Display Name	Store ID	Internal URL	Domain Name	Contact Name
My Store3	1c1b00b1-fa2b-44eb-869a-59697c388c85	diner.localhost.com	xoompos.com	Joe Manager

Open **Back Office>Cloud>Service Settings** and click Import Settings to automatically load the service URL, user name, merchant id and store id. Enter the same password used to login to the cloud service portal above. Click **Test Login** to verify that the settings are correct.



If the **Back Office>Cloud** menu is not enabled, open **Back Office>Employees>Jobs & Permissions** and enable the **Allow Back Office Cloud** permission. Log out and log in again to enable the **Back Office>Cloud** menu.





Part 10

# Credit Cards





## 10 Credit Cards

### 10.1 Processing Choices

AmigoPOS offers a direct interface to [ChargeItPro](#)<sup>[327]</sup>, [Vantiv](#)<sup>[335]</sup> (formerly Mercury Payments), [OpenEdge](#)<sup>[435]</sup> (formerly XCharge) and [Datacap NETePay](#)<sup>[395]</sup> at no additional cost.

- All options support IP processing for rapid transaction processing.
- All options support inexpensive card readers including those built in to many popular touch screen terminals
- All options offer EMV processing
- AmigoPOS does not accept residuals or payments of any sort from payment processors, banks or merchant account providers.

Business that use a [stand-alone credit/debit card terminal](#)<sup>[324]</sup> can continue to do so. After the transaction is processed successfully on the stand-alone terminal, press the settle button in AmigoPOS and select the Manual Credit payment option to complete the transaction. Refer to the help topic for a description. For businesses that prefer integrated credit card processing, AmigoPOS offers the options listed below.

	 ChargeItPro	 Vantiv formerly Mercury	 OpenEdge (XCharge)	 Datacap NETePay
<b>Choose your own payment processor</b>	No	No	No	Yes
<b>PCI Compliant &amp; Out-Of-Scope</b>	Yes	Yes	Yes	Yes
<b>Supports mini card readers (non-EMV)</b>	Yes	Yes	Yes	Yes
<b>Card reader interface</b>	USB	USB	USB	USB
<b>USB interface type</b>	KBW	HID	KBW	HID
<b>Supports EMV processing</b>	Yes	Yes	Yes	Yes
<b>Supports non-EMV processing</b>	Yes	Yes	Yes	Yes
<b>Requires additional software</b>	Yes	Yes	Yes	Yes
<b>Software Cost</b>	0	0	0	\$580 first station/\$200 each additional station
<b>Monthly service cost</b>	0	0	0	0
<b>Monthly device cost</b>	0	0	0	0
<b>Device lease commitment</b>	None	None	None	None
<b>Device Cost (non-EMV)</b>	\$50-\$500	\$50-\$500	\$50-\$300	\$50-\$500
<b>Device Cost (EMV)</b>	\$150+	\$160+	\$150-\$300	\$150-\$550
<b>Web Management &amp; Reports</b>	Yes	Yes	Yes	Yes
<b>Gift Card Processing</b>	Coming Soon	Yes	Coming Soon	Yes

EMV Device lead time	<1 Week	<1 Week	<1 Week	<1 Week
----------------------	---------	---------	---------	---------

## 10.2 Stand-Alone Terminal

Users that prefer to use an external credit card terminal may customize the available payment options on the order settlement screen to enable managers easy access to non-cash gratuity totals.

PAYMENT TYPES					
	DESCRIPTION	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON	OPEN DRAWER
	Credit Card	CREDIT CARD	2	<input type="checkbox"/>	<input type="checkbox"/>
	Credit Refund	CREDIT REFUND	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Debit Card	DEBIT CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
	Foreign Currenc	FOREIGN CURRENC	7	<input type="checkbox"/>	<input type="checkbox"/>

**Settle Screen Payment Types**

Verify that the **CREDIT CARD** payment type is not disabled in Back Office/Settings/ Main Settings/Settle Screen.

**CREDIT CARD SETTINGS**

**General Settings**

\*Interface: External Credit Card Machine

\*Interface  
Select the credit card processing method at this station

**Credit Card Settings**

Select **External Credit Card computer** next to interface in **Back Office>Settings>Credit Cards**.

ALL PROGRAM SETTINGS

Credit Cards

Text Settings

ADD NEW SETTINGS

Settings displayed on this screen are stored in the database and apply to all pos stations and back office workstations. Refer to the Peripheral or Main Settings screens for categorized settings and expanded descriptions.

Item name contains

Credit Card Button 1 MASTER CARD\*

Text to appear on credit card button (1) when using a credit card terminal. Set blank to hide or add an asterisk (\*) prefix or suffix to auto-select this card type.

Credit Card Button 2 VISA

Text to appear on credit card button (2) when using a credit card terminal. Set blank to hide or add an asterisk (\*) prefix or suffix to auto-select this card type.

Credit Card Button 3 AMEX

Text to appear on credit card button (3) when using a credit card terminal. Set blank to hide or add an asterisk (\*) prefix or suffix to auto-select this card type.

Credit Card Button 4 DISCOVER

Credit Card Buttons

The default settings for credit card types can be modified in Back Office/Settings/ Main Settings/All Program Settings by changing the values of **Credit Card Button 1**, **Credit Card Button 2**, **Credit Card Button 3** and **Credit Card Button 4**. These values correspond to the four dark gray buttons on the settlement screen, as shown below. Add an asterisk (\*) before or after the button name to automatically select the card type when the credit card payment type is selected, for example **MASTER CARD\***.

CREDIT CARD TRANSACTION

AUTH CODE

GRATUITY

TOTAL

CHANGE PAYMENT METHOD

MASTER CARD\*

VISA

AMEX

DISCOVER

1 2 3

4 5 6

7 8 9

0

TRANSACTIONS

CANCEL

NUMBER 1

TYPE COUNTER

SERVER DEMO USER

STARTED 4/12/2013 11:45 PM

SUBTOTAL \$1.55

GRATUITY \$0.00

DISCOUNTS \$0.00

SURCHARGE \$0.00

DELIVERY \$0.00

TAX \$0.14

TOTAL \$1.69

RECEIVED \$0.00

BALANCE DUE \$1.69

Settle Screen Credit Card Payment Method

## 10.3 EMV Fraud Liability Shift

In most cases the fraud liability shift will not impact the majority of AmigoPOS users due to the relatively low average transaction amount. Fine dining restaurants, night clubs that offer bottle service and other high end venues should adopt EMV capable merchant account on or before the fraud liability shift takes effect on October 1, 2015 to reduce the chargeback risk associated with fraudulent transactions.

In essence, the fraud liability shift states that if a customer pays with a chip card and your device is not capable of reading the chip and the card is swiped or manually keyed, the business will be held liable for a chargebacks. Fast food restaurants, pizzerias and bars have the lowest chargeback rate in the industry so that the benefits of early EMV adoption may not outweigh the costs associated with obtaining new devices. However, as chip cards become more prevalent, consumers will expect businesses to have payment terminals that are capable of reading the chip card.

Both [Verifone Point](#)<sup>[464]</sup> and [Mercury Payment Systems](#)<sup>[338]</sup> currently offer EMV solutions. As of this writing (September 10, 2015), Datacap is preparing to release an EMV enabled update of [NETePay](#)<sup>[395]</sup>.

The following description of the fraud liability shift is paraphrased from the [Mercury Payments](#) documentation:

### **EMV Chip Card Technology Has Arrived. Is your business ready?**

Chip cards, also known as “smart cards,” are credit or debit cards that have sensitive cardholder information embedded in a data chip in the card, as opposed to traditional credit cards where the data is only stored in the magstripe on the back of the card. While the two types of cards may look the same, the way that the data is accessed to process a payment transaction is very different. Traditional credit cards are swiped through a magstripe reader, or credit card terminal in order to perform a transaction. Chip cards can be swiped too, but have extra security advantages when processed via EMV chip readers instead.

EMV chip cards help prevent in-store fraud and are nearly impossible to counterfeit. EMV technology increases cardholder security and chip card technology is becoming the global standard for both credit and debit card payments.

### **The Liability Shift**

To increase the adoption of chip technology, Visa, MasterCard, Discover and American Express will implement a liability shift for domestic and cross-border counterfeit transactions effective October 1, 2015.

Once the shift goes into effect, **merchants who have not made the investment in chip-enabled acceptance technology may be held financially liable for in-store fraud that could have been prevented with the use of a chip-enabled acceptance device**. Mercury Payments makes it simple for you to meet the new EMV standards using your POS system.

### **Key Benefits**

- Reduce risk of counterfeit, lost or stolen card fraud
- Reduce card skimming at the point of sale
- Accept foreign cards that are already EMV enabled
- Modernize your POS by supporting EMV and contactless payment technologies

### **Next Steps**

If you want to avoid the fraud liability after October 2015, you'll most likely need to implement an EMV capable card reader that can interface properly with your POS system and its software. If your POS system is incompatible with EMV technology, you may need to upgrade your software and hardware. Because there are many considerations, adding EMV acceptance is best done in partnership with your POS provider.

Mercury® works with POS system developers, value-added resellers, and merchants to help businesses achieve EMV acceptance. Contact us, or your POS provider today to get started.

## 10.4 ChargetPro

### 10.4.1 Overview

ChargetPro offers PCI compliant and EMV capable credit card processing that integrates directly with AmigoPOS and requires a merchant account from ChargetPro. AmigoPOS does not store any sensitive credit card information. All sensitive credit card data is passed directly between the ChargetPro client components and the payment processor so that the pos is entirely out of scope.

#### Initial Setup

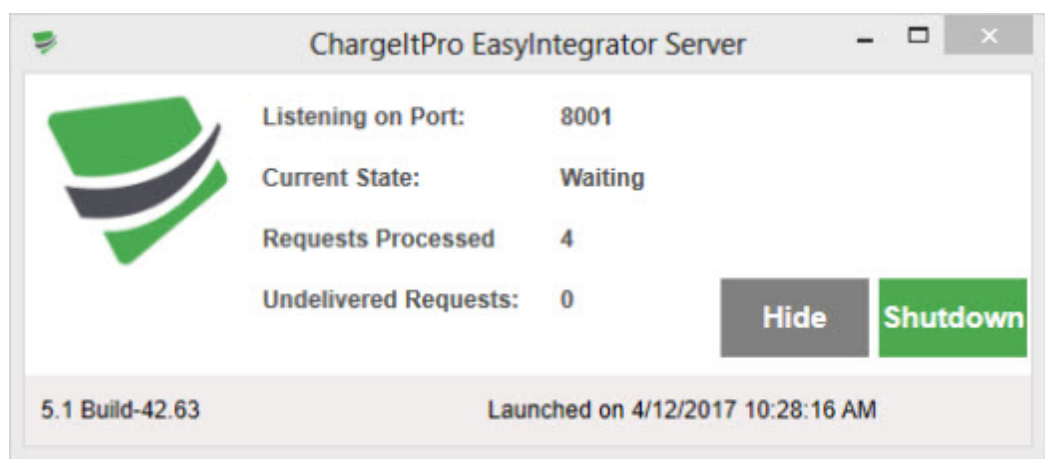
- Contact ChargetPro to obtain a merchant account and obtain the ChargetPro desktop application
- Install ChargetPro at the pos station and run a test transaction to verify that the account is set up correctly
- Enter back office settings

#### ChargetPro Contact Information

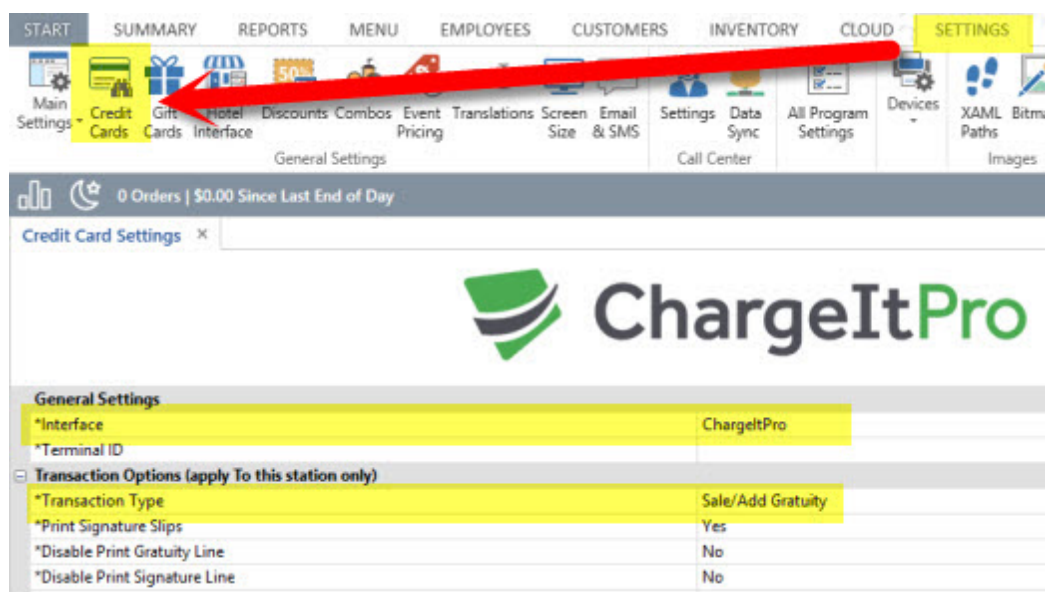
800-989-2135  
support@chargeitpro.com

### 10.4.2 Setup

First obtain the merchant account and login credentials for the ChargetPro online portal from your ChargetPro account representative. Install ChargetPro EasyIntegrator Server and start the server. Verify that ChargetPro EasyIntegrator Server is running by clicking the green icon in the taskbar notifications panel.



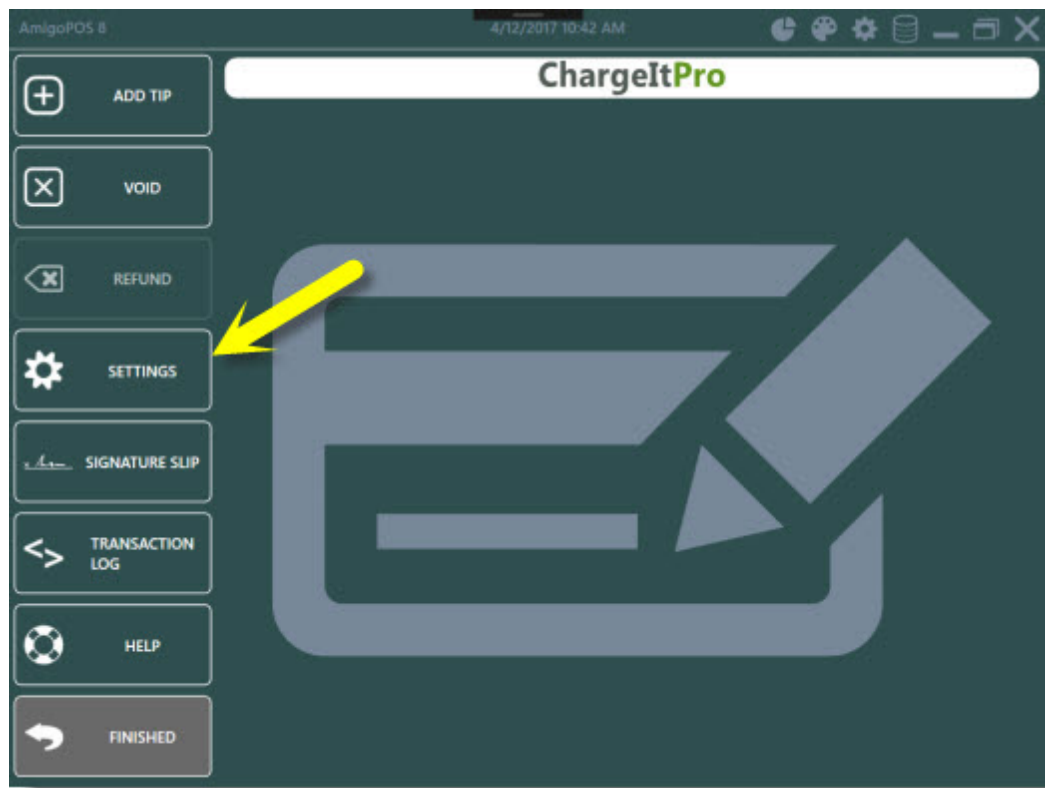
Navigate to **Back Office>Settings>Credit Cards** and select **ChargetPro** from the drop-down list. Set the transaction type to Sale/Add Gratuity so that the sale is added to the current batch immediately upon authorization and a gratuity can be added if required.



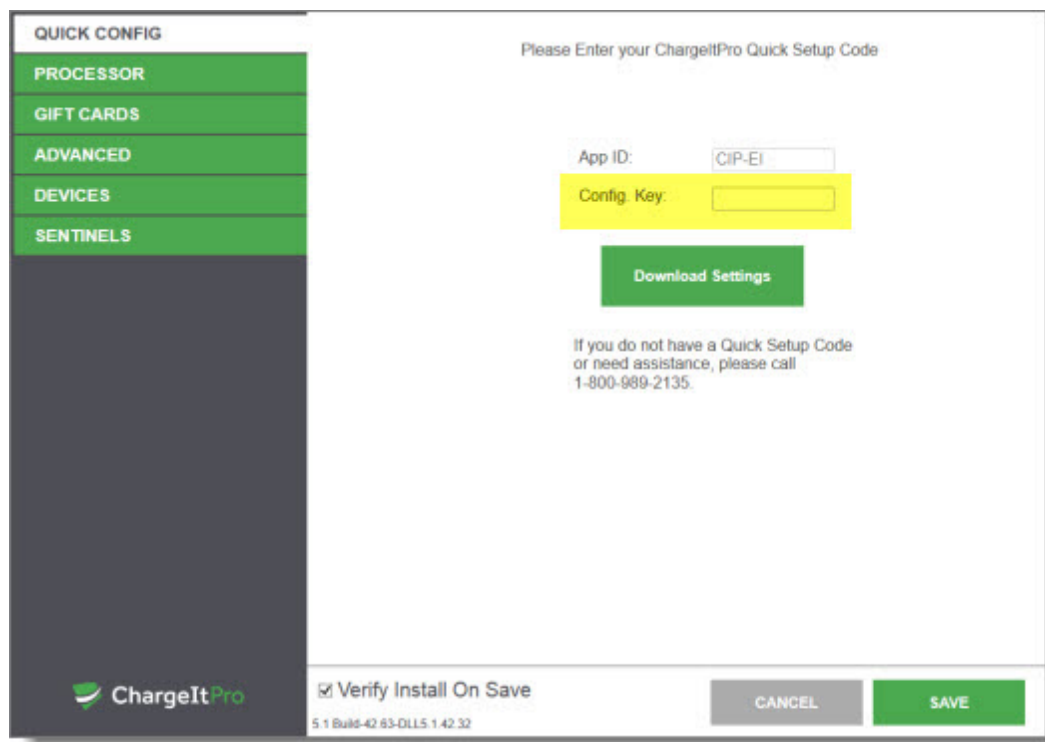
Login to AmigoPOS and open the credit cards screen (bottom-right button).



Press the Settings button to open the ChargeItPro configuration screen.



Enter the configuration key provided by your ChargeItPro account representative and click Download Settings. The settings will be downloaded and saved automatically.





Press the Settings button to reopen the ChargeItPro configuration screen and click the Advanced tab. Check the box next to Use Tips if your business accepts gratuities. Click Save to update the configuration and allow a few moments for the update confirmation to appear.

**ChargeItPro**

**Advanced**

**SCREEN NUMBER**  
1: Screen One

**RESULTS SETTINGS**  
Always Display Results

**KEYBOARD**  
Selectable

☐ Default "Validate AVS/CVV" to Unchecked  
☒ Process After Swipe  
☐ Credit / Debit Request  
☐ Use Card Nickname  
☐ Use Tips

☐ Disable Voice Authorization  
☐ Use Level 2  
☒ Imprint Card Alert

☐ Prompt For Last 4 Digits  
☐ User-Defined Path:  
 C:\ChargeItPro\EIServer

**ACH Payment Format**  
☐ Use ACH Payment Format  
 Default Format:  
 Select Formats:  
 ARC  
 BOC  
 CCD

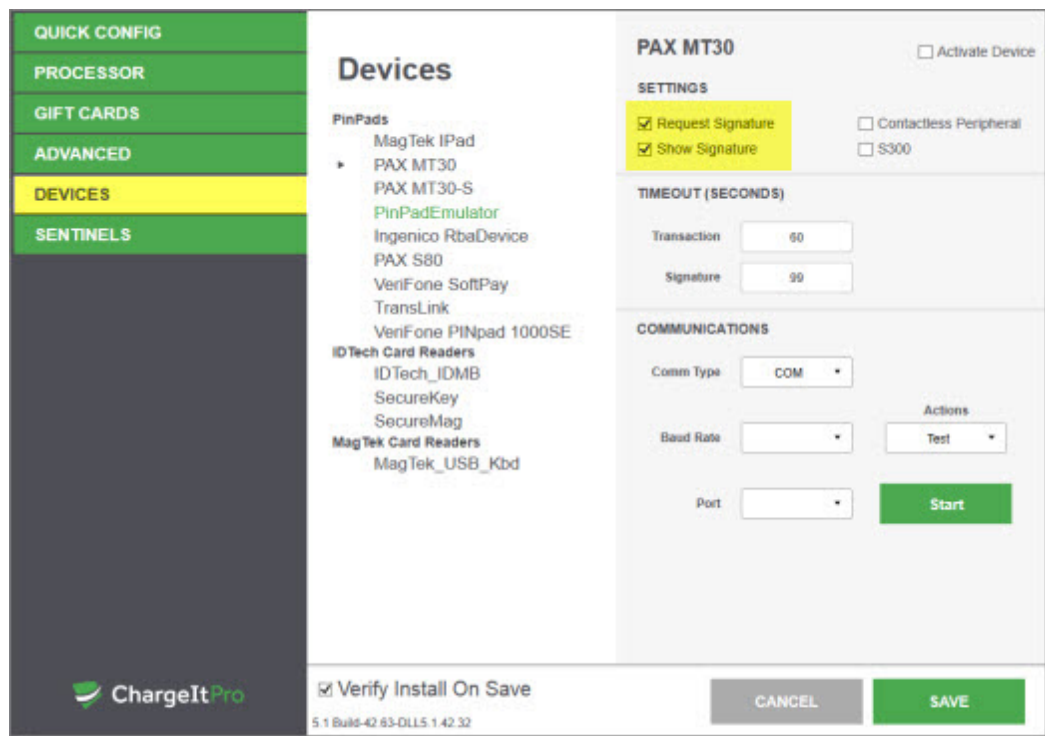
**Manual Entry Required Fields**  
☐ Billing Name  
☐ Zipcode  
☐ Street Address  
☐ CVV Code

☒ Verify Install On Save

CANCEL SAVE

5.1 Build-42 63-DLLS 1 42:32

Press the Settings button to reopen the ChargeItPro configuration screen and click the Devices tab. If the device has signature capture capability, verify the the signature show & request boxes are checked. If any changes are made, click Save to update the configuration and allow a few moments for the update confirmation to appear.

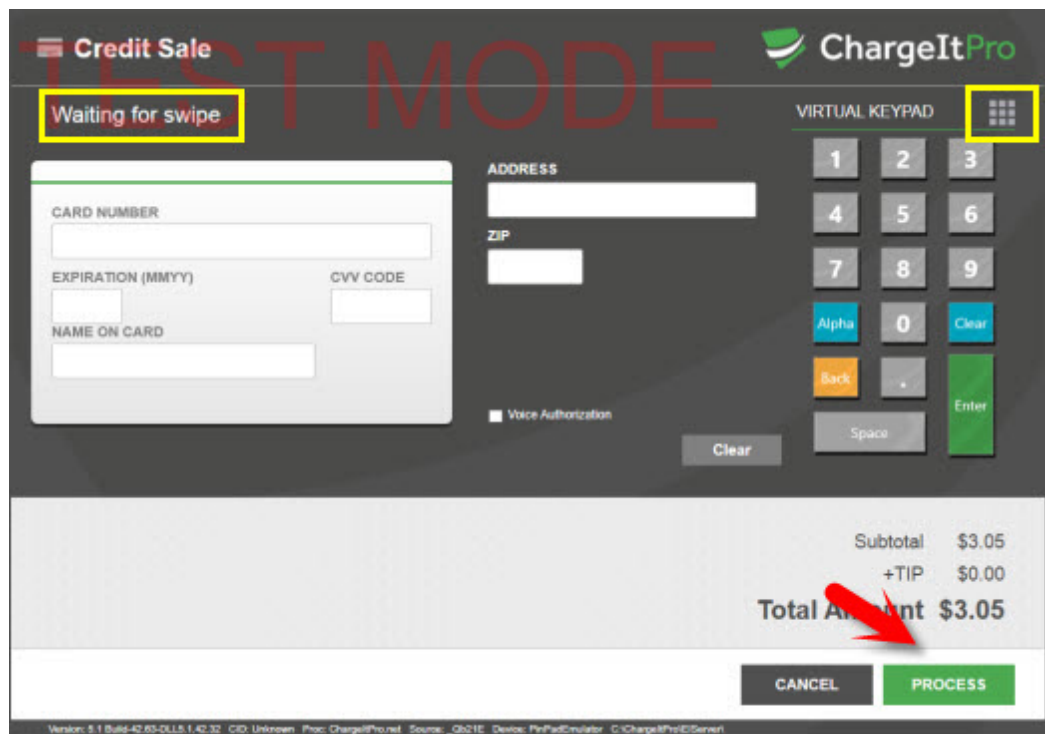


### 10.4.3 Usage

Processing transactions with ChargeItPro is slightly different from the procedure described in the [Processing Transactions](#) <sup>[524]</sup> topic. A typical Sale transaction is started by pressing the Credit button on the order entry screen, order recall list or on the settle screen. The ChargeItPro user interface appears immediately after the Credit Card button is pressed, regardless of the screen where the credit card transaction is initiated. In the example below, the transaction is started by pressing the Credit button after selected the order on the order recall list.



The ChargeItPro user interface prompts the cashier to swipe the card and allows manual entry, if necessary. An on-screen keyboard is available by clicking the button at the top-right if a physical keyboard is not attached.



The transaction is initiated immediately after the card is inserted, swiped or the card information is entered manually and the Process button is clicked. The customer will be prompted for a signature or pin entry where applicable. In the example below, the transaction was approved and the device is waiting for a customer signature. The signature can be bypassed by pressing the Skip Signature button.

**Credit Sale** **ChargeItPro**

**Transaction approved: Waiting for signature**

CARD NUMBER  
.....

NAME ON CARD  
.....

VISA

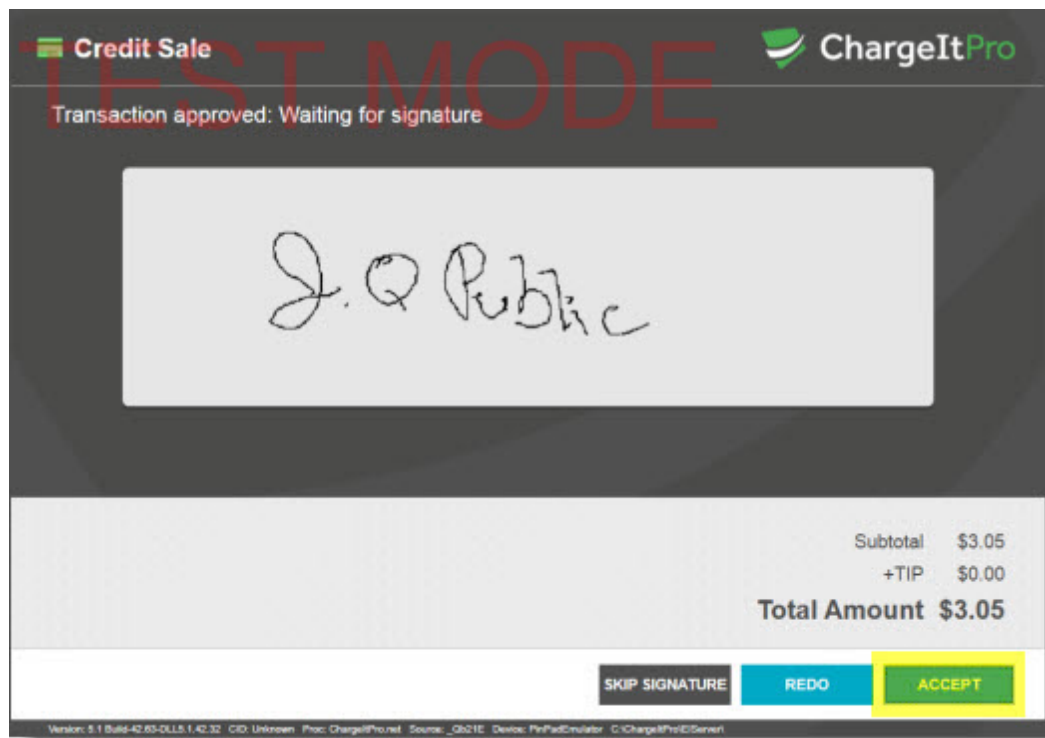
☐ Voice Authorization

Subtotal \$3.05  
+TIP \$0.00  
**Total Amount \$3.05**

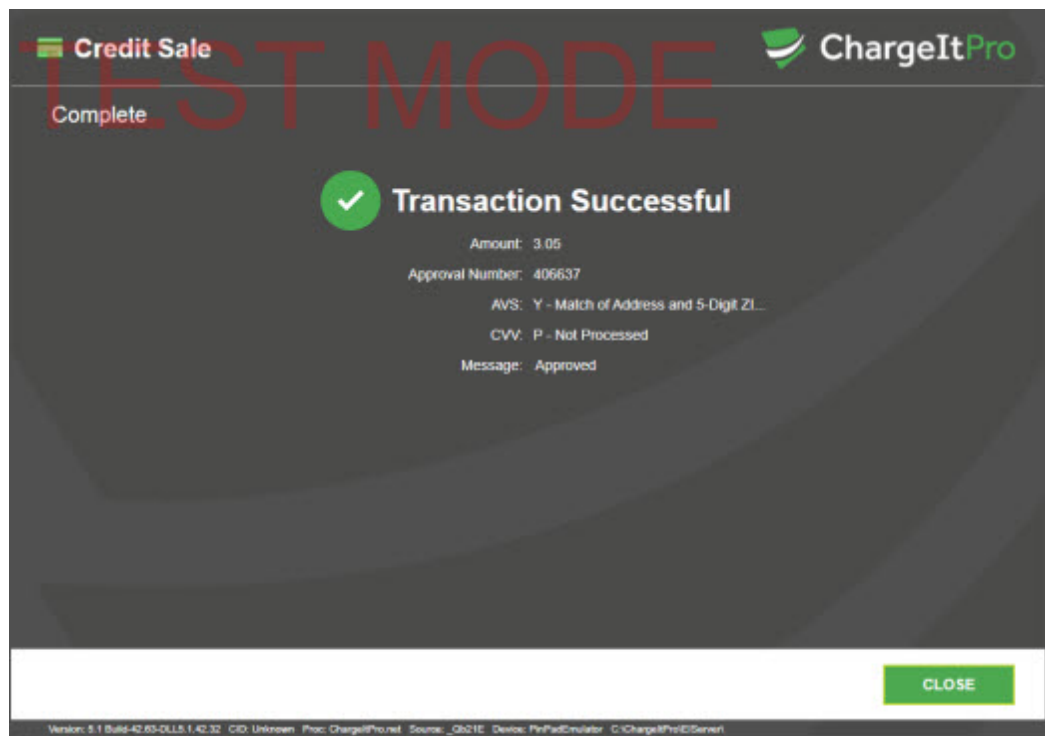
**SKIP SIGNATURE**

Version: 5.1 Build 42-63-0115 1.42.32 CID: Unknown Proc: ChargeItPro.net Source: \_Q621E Device: PnFadEmulator C:\ChargeItPro\CServe

In the example below, the customer's signature was entered and the ChargeItPro user interface prompts the cashier for approval. If the signature is not acceptable, the customer can be prompted to sign again by clicking the blue Redo button at the bottom.



After the signature is accepted, a transaction confirmation is displayed and the transaction is saved in the pos. Click the Close button to return to the pos.



The signature slip is printed automatically and the customer's signature is printed at the bottom. Refer to the [Signature Slips](#) help topic for additional information.

MY RESTAURANT  
1 MAIN STREET  
SOUTH PARK, CO

CREDIT CARD SALE

POS TRANS ID: 19  
RESULT: e041c614b0  
DATE: Apr11 12, 2017  
TIME: 11:07 AM  
AUTHORIZATION: e041c614b0  
REFERENCE:  
SEQ ID: 0  
SERVER: DEMO U  
CASHIER: DEMO U  
ORDER ID: 18  
ACCOUNT: XXXXXXXXXXXX10  
ENTRY TYPE: SWIPED  
CARD ISSUER: VS  
CARDHOLDER: 10  
EXP DATE: XX/XX  
AMOUNT: 3.05

GRATUITY: \$. . . . .

TOTAL: \$. . . . .

SIGNATURE:

*J. Q. Public*

I agree to pay the above total according  
to the card issuer agreement

MERCHANT COPY

If tips are enabled as described in the [Setup](#)<sup>[327]</sup> topic, a gratuity can be added before the batch is settled by following the procedure described at the [Processing Transactions](#)<sup>[524]</sup> topic. Additional options such as Void and Refund are also available.

## 10.5 Vantiv

### 10.5.1 Overview



#### Introduction

**Vantiv (formerly Mercury) is developed and supported by Vantiv and is included with AmigoPOS at no additional cost. A merchant account from Mercury Payment Systems is required to use Mercury Pay. Visit**

<http://www.vantiv.com> for additional information. AmigoPOS does not accept compensation of any sort to include Vantiv (formerly Mercury). It is included for merchants that require a new merchant account and wish to avoid the expense and setup associated with Verifone Point, Datacap NETePay or an external credit card terminal.

Mercury Pay is the transaction engine that handle all payment processing requests submitted by AmigoPOS. AmigoPOS is capable of processing credit/debit card transaction using the Datacap PDCX or EMV component. Reports and other advanced functions are available with [MercuryView®](#), a secure web site using any internet browser. The following integration methods are available:

- **PDCX**<sup>[345]</sup>: Offers tokenization with a wide range of supported devices
- **E2E**<sup>[387]</sup>: Offers end to end encryption using the Verifone VX805
- **EMV**<sup>[384]</sup>: Offers end to end encryption with EMV (chip card) support using the Verifone VX805

#### Contact Information

877.826.1725

<https://www.vantiv.com/get-started>

<http://www.vantiv.com>

#### Setting Up Mercury Pay

After obtaining a merchant account from Mercury Payment Systems, enter the back office parameters by selecting the integration method above.

#### Using AmigoPOS to process credit card transactions

After Vantiv (formerly Mercury) and AmigoPOS Back Office are configured, credit card transactions can be processed as described in the [Processing Transactions](#)<sup>[524]</sup> topic.

## 10.5.2 NETePay In-Store

Datacap NETePay for Mercury In-Store is a lightweight version of NETePay that does not require a local database server and runs in the background. It is available at no cost but requires a Deployment ID from Mercury in order to obtain a serial number.

#### Important Notes – Before you begin:

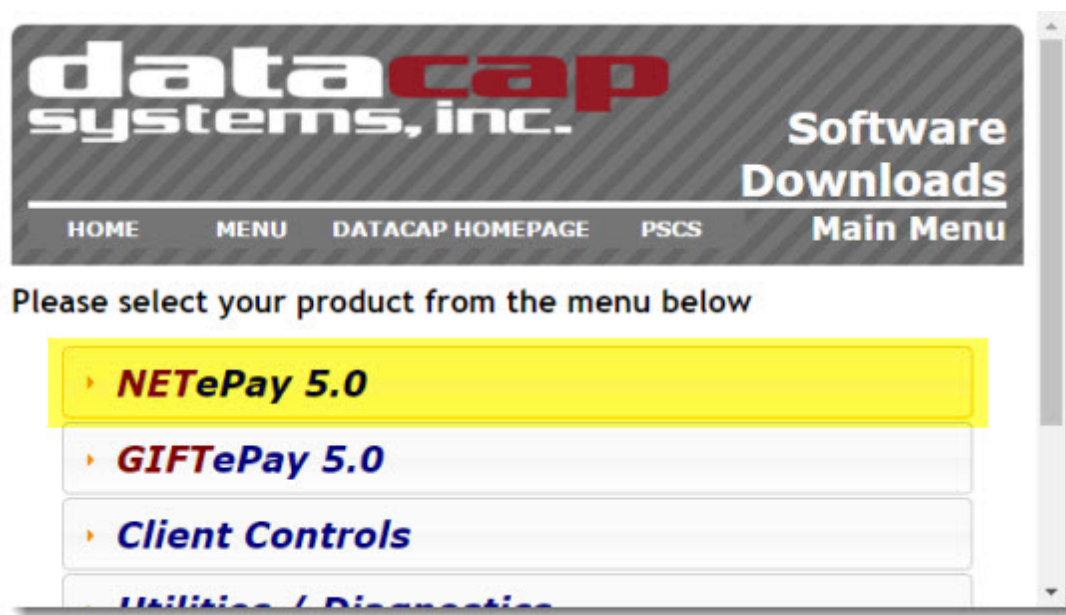
- Obtain a Deployment ID from your Mercury Payments account representative
- A working internet connection is required for this process
- Firewalls should accept traffic on port 9000 (and port 9100 if using Gift)

#### Complete the following steps to install and configure NETePay for Mercury In-Store

- [Download and Install the NETePay for Mercury In-Store](#)<sup>[336]</sup>
- [Setup NETePay for Mercury In-Store](#)<sup>[337]</sup>
- [Retrieve Merchant Parameters](#)<sup>[338]</sup>
- [Create a Desktop Shortcut & Add to Windows Startup Folder](#)<sup>[341]</sup>

#### Download and Install the NETePay for Mercury In-Store

1. Download the PROD NETePay for Mercury “In-Store” from <http://www.datacapepay.com/downloadmenu/>. Install to the default location: C:\Program Files(x86)\Datacap Systems\NETePay. Install **NETePay Mercury US EMV** at the main pos station only.



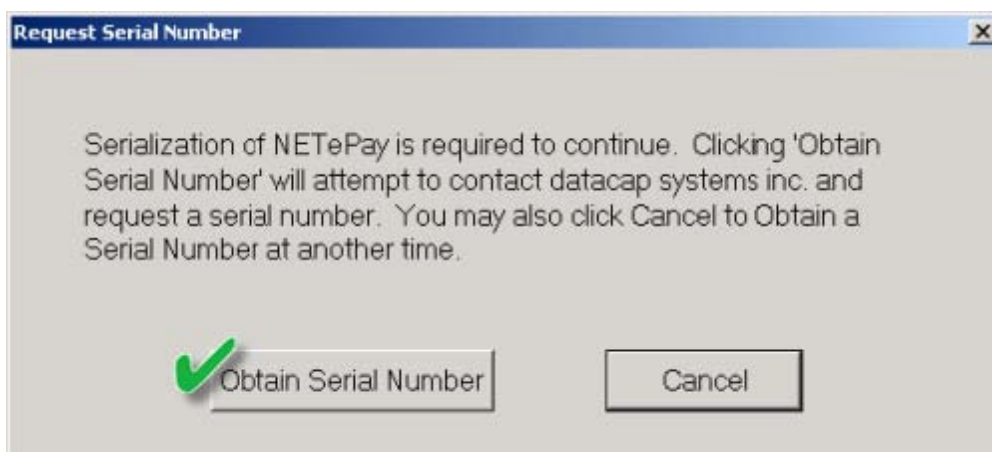
The client control in Step 1 is not required, as it is installed by default with Amigo Point of Sale. Click the download link under Step 2 to proceed.



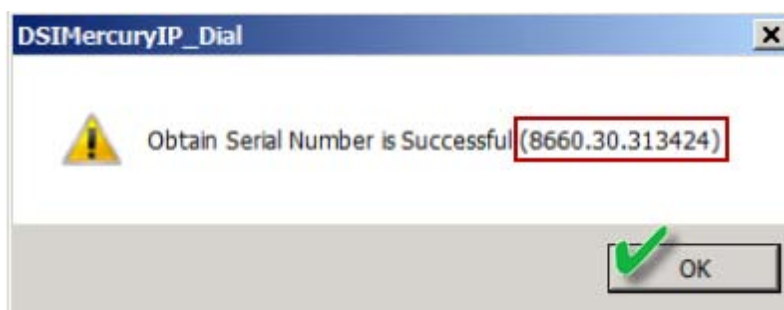
#### Setup NETePay for Mercury In-Store

1. The first time you launch the CERT NETePay, it will prompt you to obtain a serial number from Datacap's PSCS (Payment Systems Configuration Server) system.

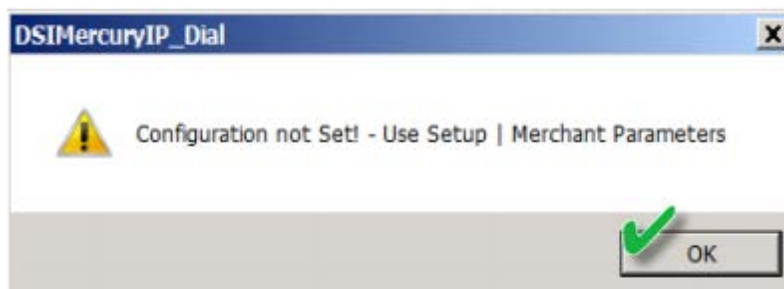




2. Click Obtain Serial Number. If NETePay is successful in obtaining a serial number but is unable to locate merchant parameters for the assigned serial number, you will see the following dialog box. The dialog contains the 10-digit serial number that was automatically assigned to NETePay.



3. Click OK and a new dialog box will appear. This dialog box indicates that NETePay has not yet retrieved merchant parameters from Datacap's PSCS server. It cannot operate until these parameters are downloaded.



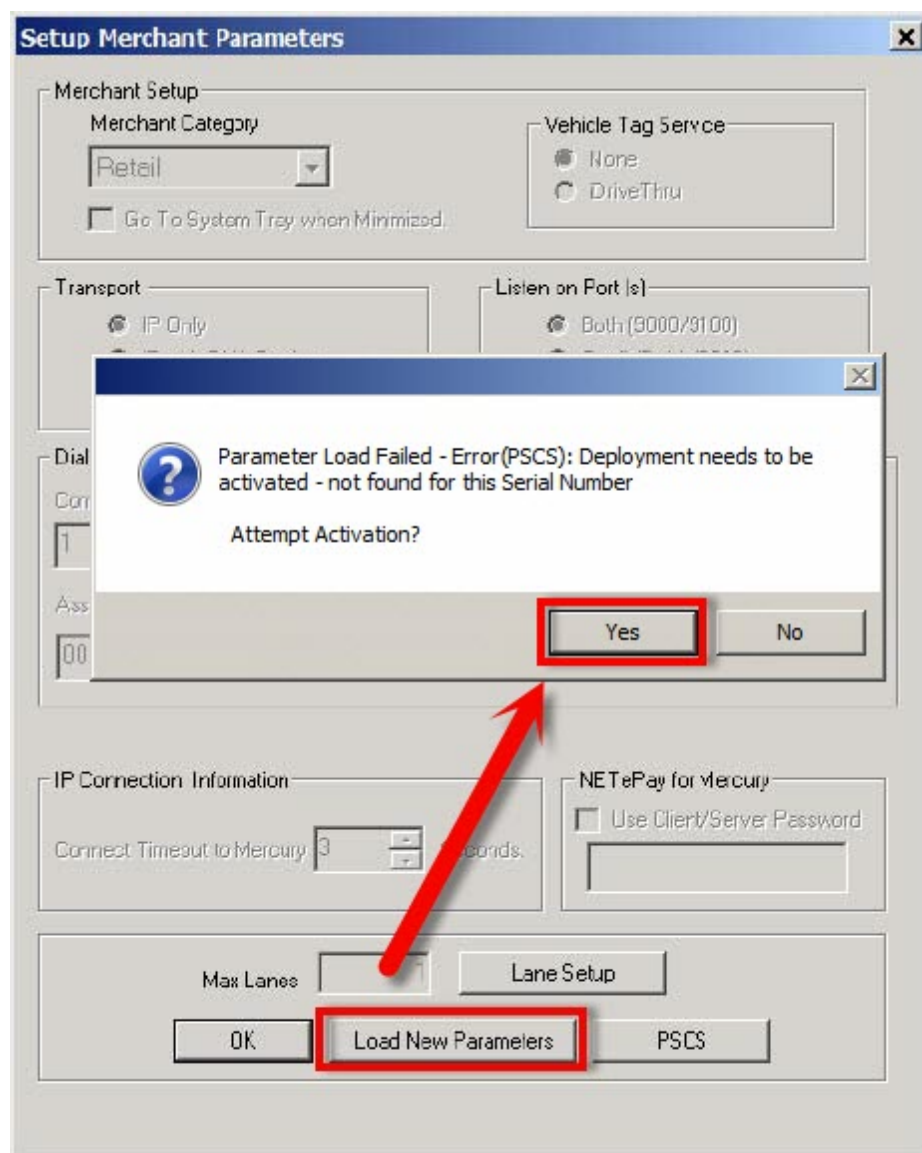
4. Click OK and you will be returned to the NETePay main status window. If your Mercury Payments account representative has created a parameter file on Datacap's PSCS server, proceed to the next section below, Retrieve Merchant Parameters. If a parameter file was not created, contact your Mercury Payments account representative to create the merchant parameters.

#### Retrieve Merchant Parameters

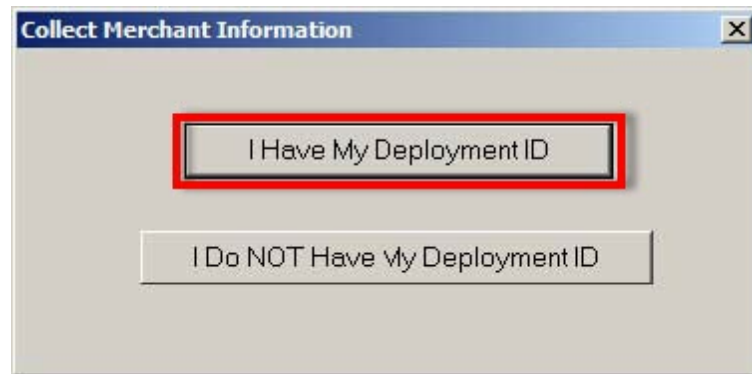
1. Open NETePay and select Setup.



2. You will see the **Setup Merchant Parameters** screen. Click **Load New Parameters**, and on the following screen click **Yes**.



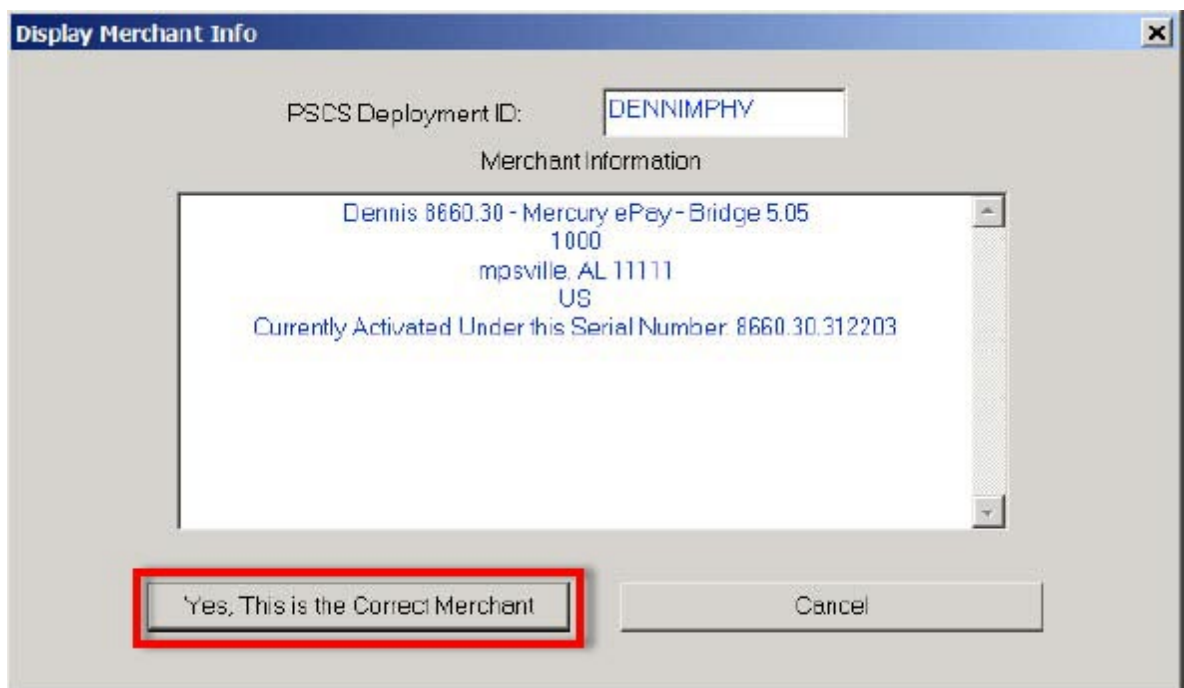
3. A new screen displays. Click I have my DeploymentID. (This was provided to you by your integration analyst):



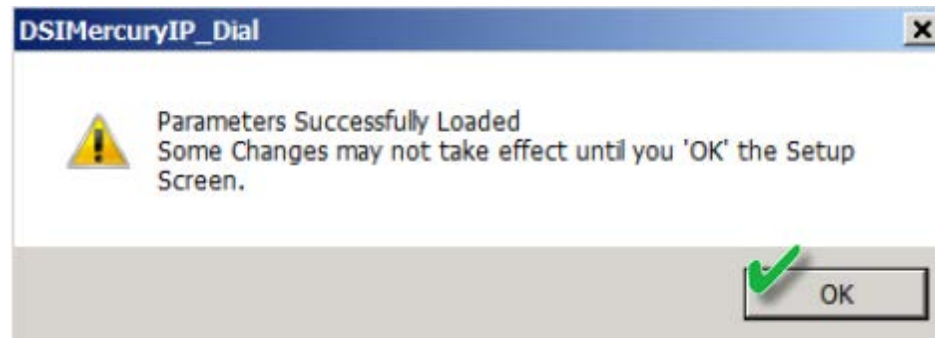
4. In the dialog box that displays; enter the Deployment ID you received, then click OK.



5. A new screen will display with merchant demographic data. If the information is correct, click Yes This is the Correct Merchant. If the information is not correct, click Cancel and retry entry from the beginning of Step 3.



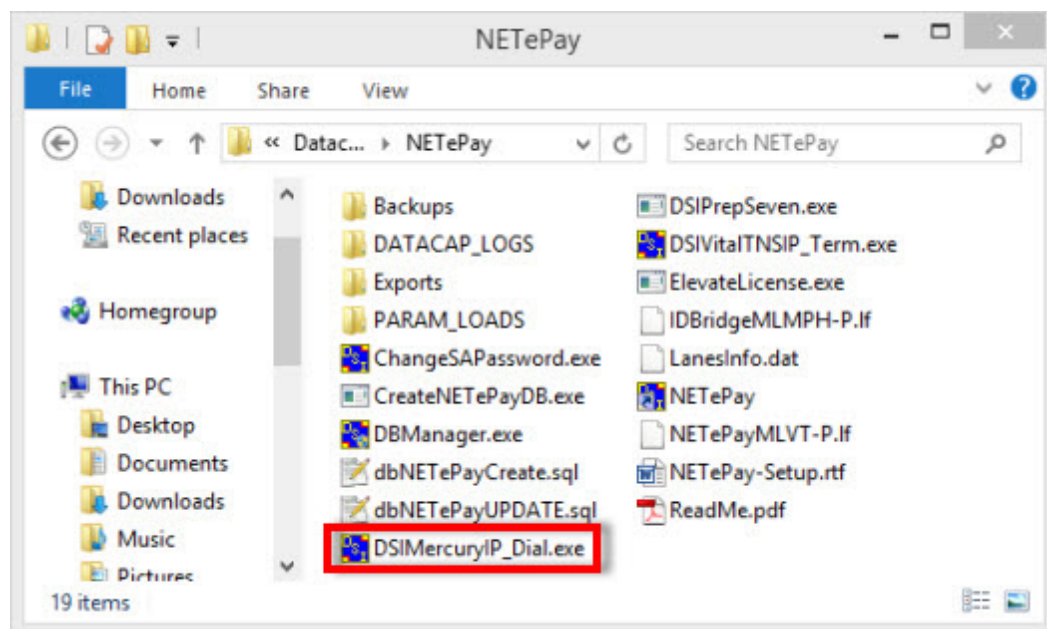
6. If NETePay successfully retrieves the parameters associated with the entered DeploymentID from the Datacap PSCS server, you will see the following dialog box. Click OK. You will be brought back to the Setup Merchant Parameters screen.



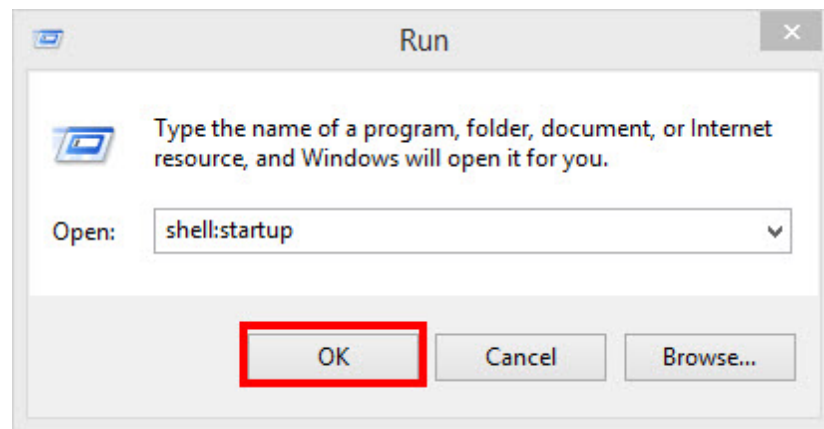
#### Create a Desktop Shortcut & Add to Windows Startup Folder

Important Note NETePay must always be running to process transactions. A shortcut to DSIMercuryIP\_Dial.exe should be added to the Windows Startup folder so that NETePay is automatically started when Windows is booted.

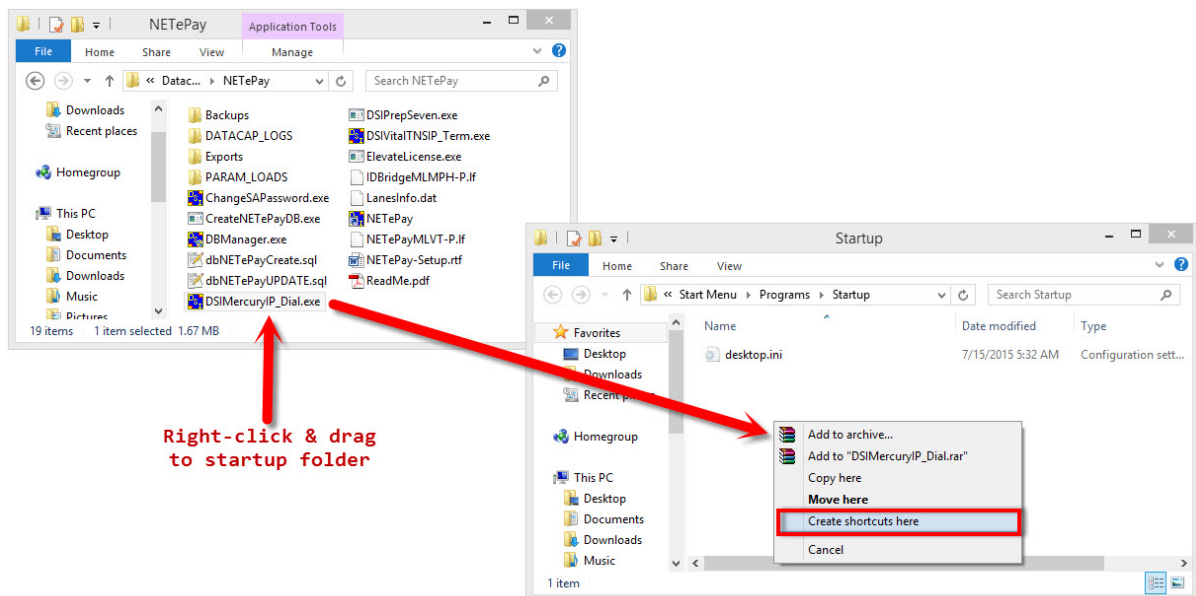
1. Open the directory C:\Program Files(x86)\Datacap Systems\NETePay (C:\Program Files\Datacap Systems\NETePay on 32-Bit systems)



2. Open the Windows Startup Folder or click Start/Run, type **shell:startup** and click OK.



3. Right-click on DSIMercuryIP\_Dial.exe and drag to the startup folder. Release the right-mouse button to display the context menu and click **Create shortcuts here**.



### 10.5.3 VX805

The **Verifone VX805 with the USB interface** is required for Mercury E2E and Mercury EMV and can be obtained from [The Phoenix Group](http://www.phoenixgrouppos.com/). The VX805 must be programmed specifically for Mercury. Note that the VX805 is also compatible with the PDCX integration method.

The following forms are required to order the VX805:

- [New Customer Information](#)
- [Order Form](#)

#### Contact Information

url: <http://www.phoenixgrouppos.com/>

The Phoenix Group

6705 Keaton Corporate Parkway  
O'Fallon, MO 63368

Phone: 866-559-7627  
Fax: 866-567-9634

### Driver Installation

The driver should be installed **prior to connecting the VX805** to a USB port on the pos station. If a driver disk has not been provided by Mercury Payments, download the driver from the AmigoPOS [Drivers and Utilities](#) download page.

## Drivers and Utilities

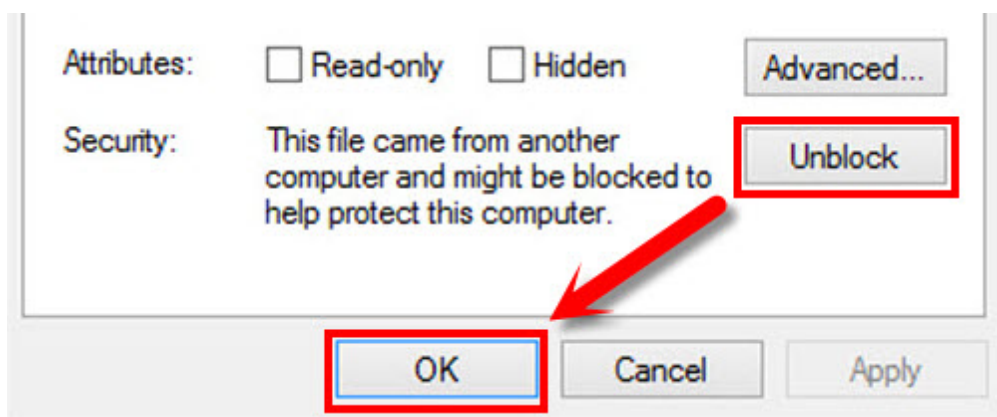
### AMIGO POS PREREQUISITES

- [Microsoft .Net Framework 4 \(Standalone Installer\)](#): Note that Amigo and later now requires the full framework (not the client profile) for features such as web ordering. Reboot the workstation after install.

### VERIFONE VX805 USB DRIVER

- [VeriFone USB Driver 1.0.0.52](#)

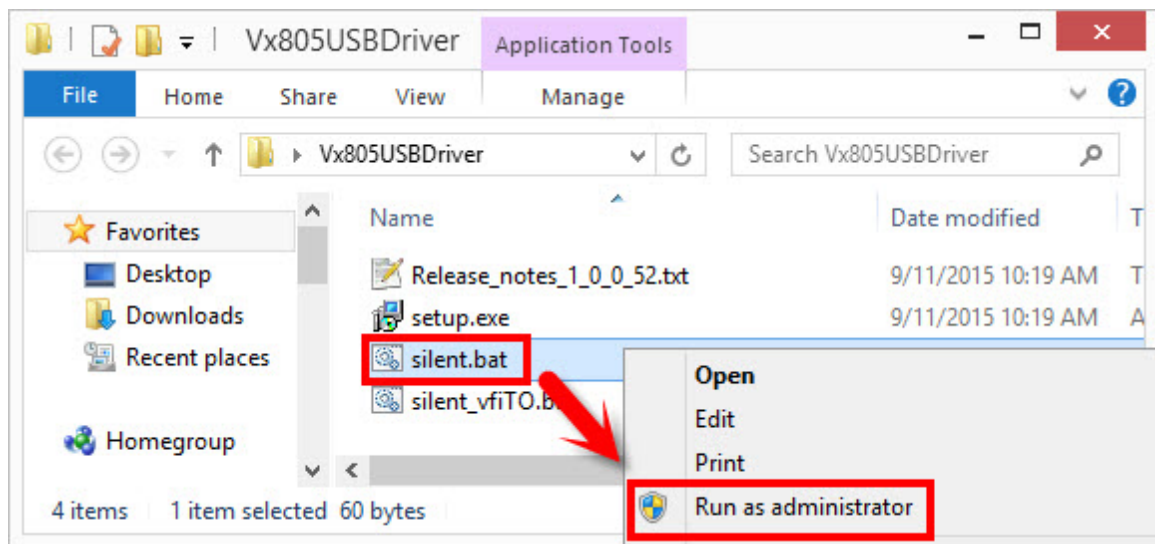
Before extracting the zip file, right-click on the file, select Properties and click Unblock and OK. Right-click on the file and select Extract All... to unzip the file.



Unblock the Zip File

Open the folder, right-click on selent.bat batch file and select **Run as administrator** to install the drivers. The batch file will run the setup.exe driver installer silently (no user interface) and create a new virtual com port named COM9. Wait for the installation to complete.





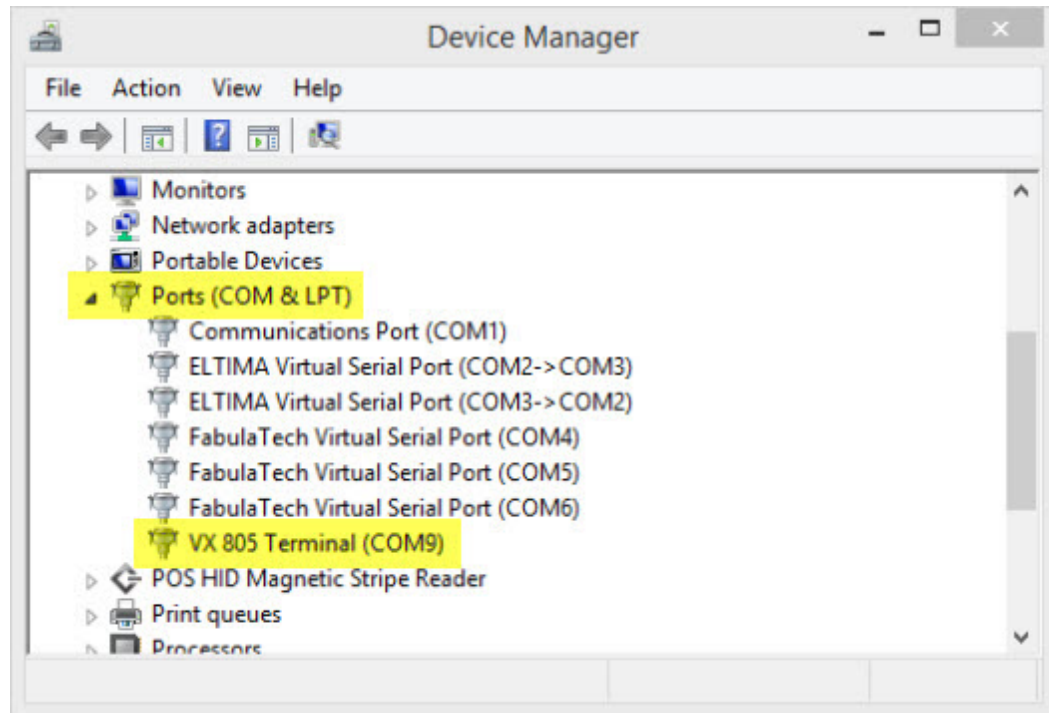
#### Connect the VX805

**Important Note:** As a precaution, the manufacturer recommends that the USB model be plugged directly into your computer and not be used with a USB hub device. A higher than normal rate of failure has been associated with the use of hubs where the amount of power supplied over USB has varied.

Loosen the screw at the bottom of the VX805 with a mini Phillips head screwdriver and remove the cover by sliding toward the back. Firmly attach the USB interface cable to the VX805, replace the cover and tighten the screw.



Connect the other end of the USB interface cable to any available USB port on the pos station. Do not connect the cable to an external USB hub. Open Windows Device Manager and verify the the device is listed under Ports. If the VX805 does not appear in the device manager, disconnect the VX805 from the USB port on the pos station, reboot Windows and attach the VX805 to the USB port on the pos station again.



## 10.5.4 PDCX

### 10.5.4.1 Overview

#### Overview

Mercury PDCX integration method is fully PCI compliant and out of scope. The PDCX component is ideal for users with an existing magnetic card reader. Many popular Magtek, IDTech and Pos-X card readers (both stand-alone and integrated) are compatible simply by [switching the mode](#)<sup>[35]</sup> from keyboard wedge to HID. Refer to the [compatible device list](#)<sup>[34]</sup> before ordering a new card reader or pin pad.

In addition, the [Mercury Dial Bridge Backup](#) can be used to provide a redundant connection using the phone line in case of internet or network disruption.

#### Prerequisite


- Obtain a merchant account from Vantiv specifically for Mercury PDCX
- Install and configure [Datacap NETePay for Mercury In-Store](#)<sup>[33]</sup>


#### Setup


First change the mode of the magnetic card reader from keyboard wedge to HID, if necessary. Obtain the merchant account parameters from Mercury and open **Back Office>Settings>Credit Cards**.




Credit Card Settings X
X









**General Settings**

*Interface	Mercury PDCX/Datacap NETePay	
*Integration Type	Mercury PDCX	
*Merchant ID	337234003	
*Server URLs	127.0.0.1	Server Test
*Batch Method	Time Initiated (Automatic)	
*Card Reader	POS-X XM95U	Device Test
*COM Port	None	
*PIN Pad Type	None	

**\*Interface**

Select the credit card processing method at this station

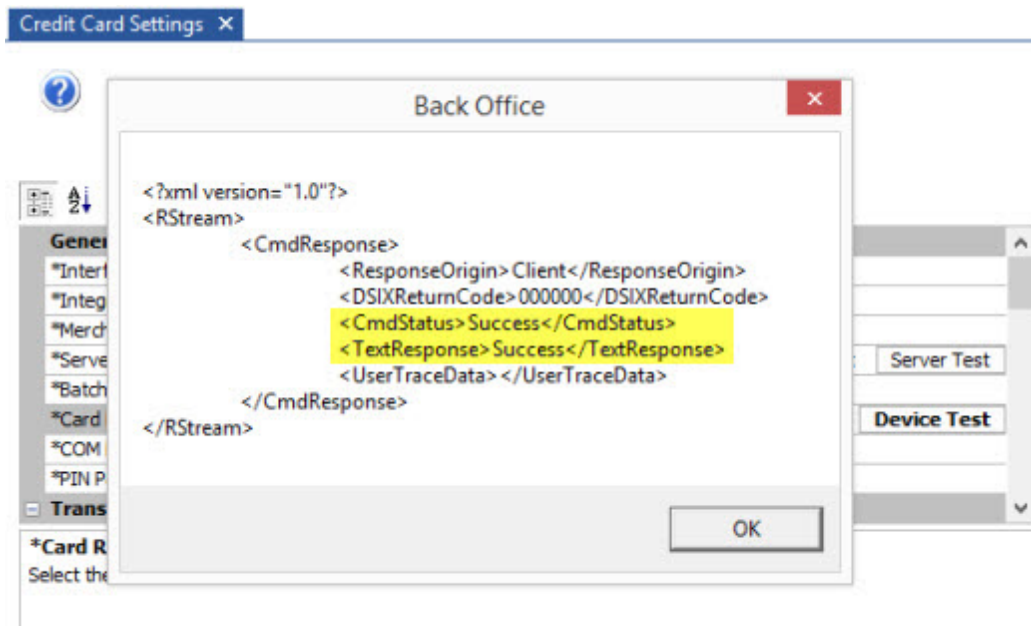
back office/settings/credit cards

#### Setup Parameters

- **Interface:** Select Mercury PDCX/Datacap NETePay
- **Integration Type:** Select Mercury PDCX
- **Merchant ID:** Enter the merchant number as shown on the me
- **Server URLs:** Enter the IP address of the pos station that is running Datacap NETePay For Mercury In-Store. Use 127.0.0.1 if Datacap NETePay for Mercury In-Store is running on the local pos station.
- **Batch Method:** Select the batch method. In most cases the batch is time-initiated so that the batch is settled automatically at the same time each day
- **Card Reader:** Select the card reader. This may require trial and error until the [test](#)<sup>346</sup> is successful
- **COM Port:** Most HID card readers do not use a COM port. Card readers that require a separate driver may create a virtual COM port, which appears in the Windows device manager under ports
- **PIN Pad Type:** The pin pad is used for debit card transactions only. When using a magnetic card reader with an integrated pin pad, such as the Verifone VX805, select the device from the drop-down list.

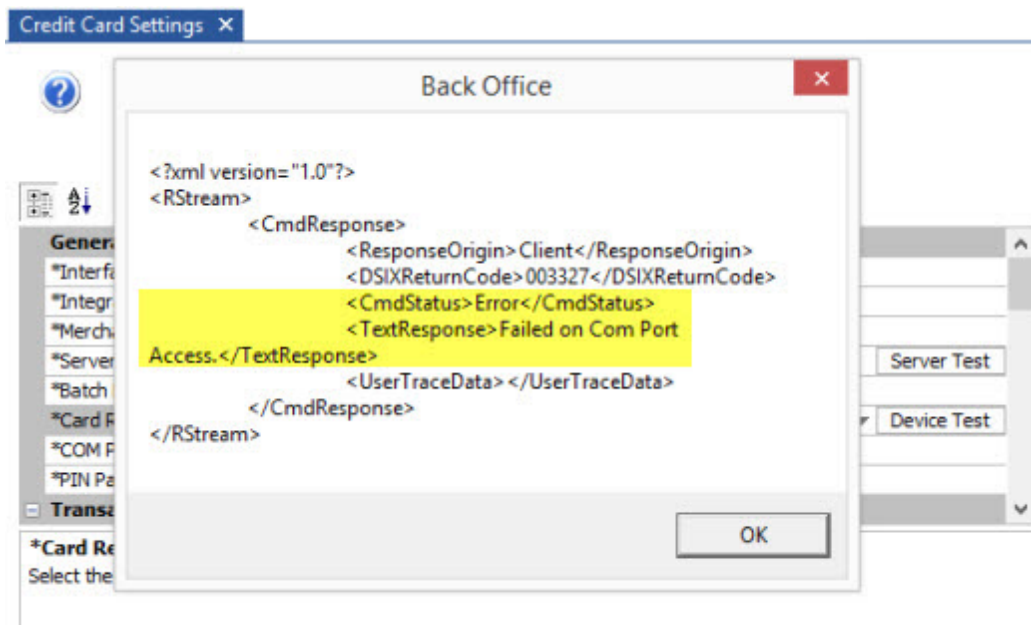
#### Card Reader Test

Click Device Test to verify that the PDCX component can communicate with the card reader. The results of the test are displayed in XML format. An successful test is indicated by Success in both the <CmdStatus> and <TextResponse> fields.



#### Successful Test

An unsuccessful test is indicated by Error in the `<CmdStatus>` field and will include a detailed error description in the `<TextResponse>` field. The 'Failed on Com Port Access' error is usually due to incorrect card reader selection or incorrect COM port selection.




#### Unsuccessful Test


### 10.5.4.2 Compatible Devices

The following list of devices is compatible with both Mercury Pay (PDCX) and Datacap NETePay, current as of April 29, 2015. Please refer to the EMV topic for Mercury EMV compatible devices.




Magnetic Stripe Readers	Device	Secure Device ID	Encryption Key	Distributor
	<a href="#">MagTek Dynamag</a>	MTMINIMSRHID Or MTMINIMSRVCOM Or MTMINIMSR	No encryption	JR's POS Depot
	<a href="#">MagTek SureSwipe</a>	MTSURESWIPEVCOM	No encryption	JR's POS Depot
	<a href="#">ID Tech SecureMag</a>	IDTSECUREMAGHID Or IDTMSRHID	IDT-KEYINJ-063-A	JR's POS Depot ID Tech
	<a href="#">ID Tech SecuRed</a>	IDTSECUREDMSRHID	IDT-KEYINJ-063-A	JR's POS Depot ID Tech
	<a href="#">POS-X XM95U</a>	IDTPOSIXMSRHID	No encryption	ScanSource MS Cash Drawer
	<a href="#">VivoPay 4500M</a>	VIVO4500M		JR's POS Depot ID Tech

PIN Pads	Device	Secure Device ID	Distributor
	<a href="#">Verifone VX805</a> <a href="#">VX810</a> <a href="#">VX820</a>	VX805XPI Or VX810XPI Or VX810XPI	JR's POS Depot Phoenix Group

	<a href="#"><u>Verifone MX850</u></a>	VERIFONEMX850	JR's POS Depot Phoenix Group
	<a href="#"><u>Verifone MX915</u></a>	VERIFONEMX915	JR's POS Depot Phoenix Group
	<a href="#"><u>Ingenico ISC 250</u></a>	INGENICOISC250 Or INGENICOISC250_MERCURY_E2E	JR's POS Depot
	<a href="#"><u>Ingenico iPP 350</u></a>	INGENICOIPP350	JR's POS Depot
	<a href="#"><u>UIC PP795 &amp; PP795SE</u></a>	UIC795 Or UIC795SE	JR's POS Depot POS Portal
	<a href="#"><u>Equinox L5300</u></a>	EQUINOXL5300	JR's POS Depot POS Portal
	<a href="#"><u>MagTek iPAD</u></a>	MTIPADHID	JR's POS Depot

<b>All-in-One's</b>	Device	Secure Device ID	Encryption Key	Distributor
	<a href="#"><u>Posiflex "KS" Series</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	Posiflex

	<a href="#"><u>J2 Retail J2 650</u></a>	J2650MSRVCOM		J2 Retail
	<a href="#"><u>FEC Gladius Smart AL7385</u></a>	FECMSRHID		FEC
	<a href="#"><u>FEC AerPOS</u></a>	FECAERMSRHID		FEC
	<a href="#"><u>POSBANK USA AnyShop II</u></a>	ANYSHOPPOSMSRHID		POSBANK
	<a href="#"><u>AdvanPOS EP-5500-XX10/AR30</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	AdvanPOS
	<a href="#"><u>Touch Dynamic Breeze</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	Touch Dynamic
	<a href="#"><u>IBM SurePOS 500</u></a>	IBMSUREPOSMSR		Toshiba
	<a href="#"><u>Micros PCWS 2015</u></a>	MICROSPCWSMSR		Oracle

	<a href="#"><u>Pioneer POS-Stealth Touch Series</u></a>	PIONEERSTM5MSRHID		ScanSource
	<a href="#"><u>ViVOpay Vend III</u></a>	VIVOVEND3	IDT-KEYINJ-063-A	JR's POS Depot  ID Tech
	<a href="#"><u>Partner Tech SP800</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	Partner Tech

#### 10.5.4.3 Existing Card Readers

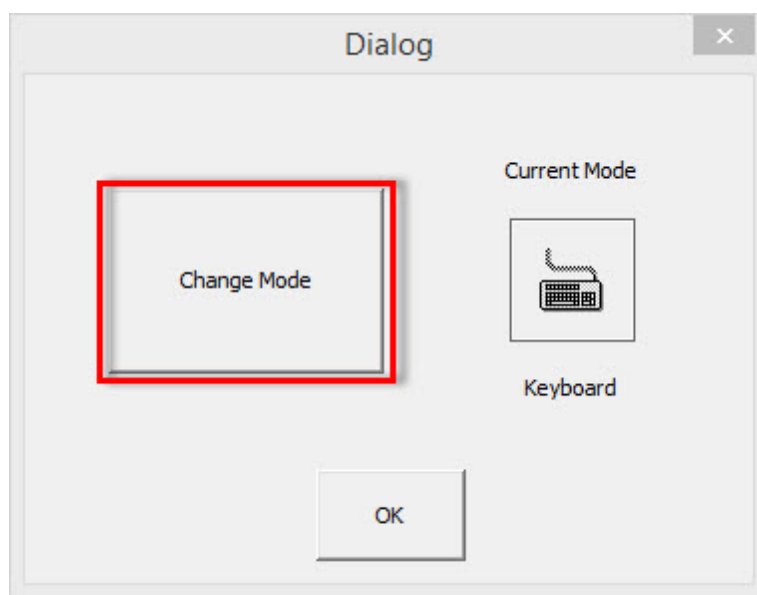
Many touchscreen monitors include an integrated magnetic card reader. In most cases, the reader is set to use keyboard wedge mode so that the reader is detected as a keyboard. Mercury Pay and Datacap NETePay require the magnetic card reader to use HID mode. Most manufacturer's provide a utility to convert the reader from keyboard wedge to HID mode, if the reader supports this function.

- [Magtek](#) 
- [IDTech/Pos-X](#) 

##### Magtek

Magtek card readers are included with many popular touchscreens such as those manufactured by Elo Touch. The card reader can be converted from keyboard wedge to HID by downloading the **Magtek MSR Change Mode** utility from <http://www.amigopos.com/Support/DriverDownload>. The utility does not require installation.

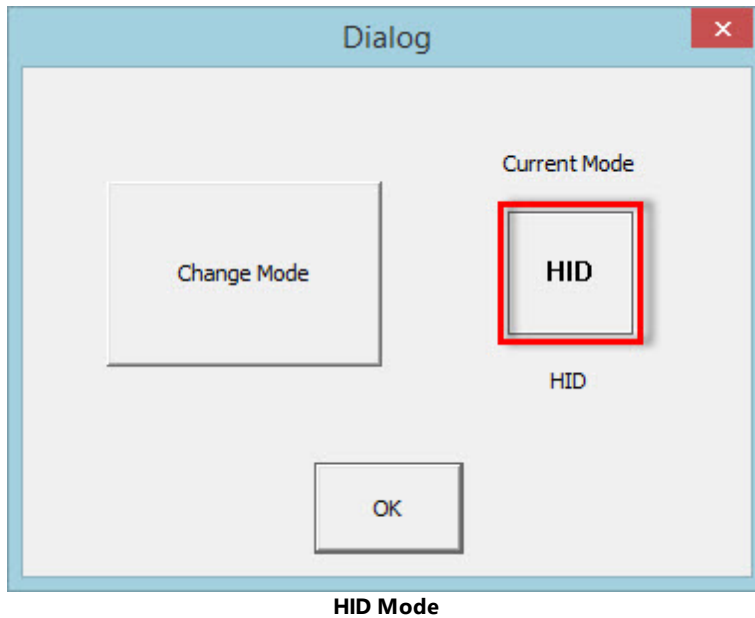
1. Unzip the file to the desktop.
2. Right-click on the file and select **Run as administrator**.
3. Click **Change Mode**



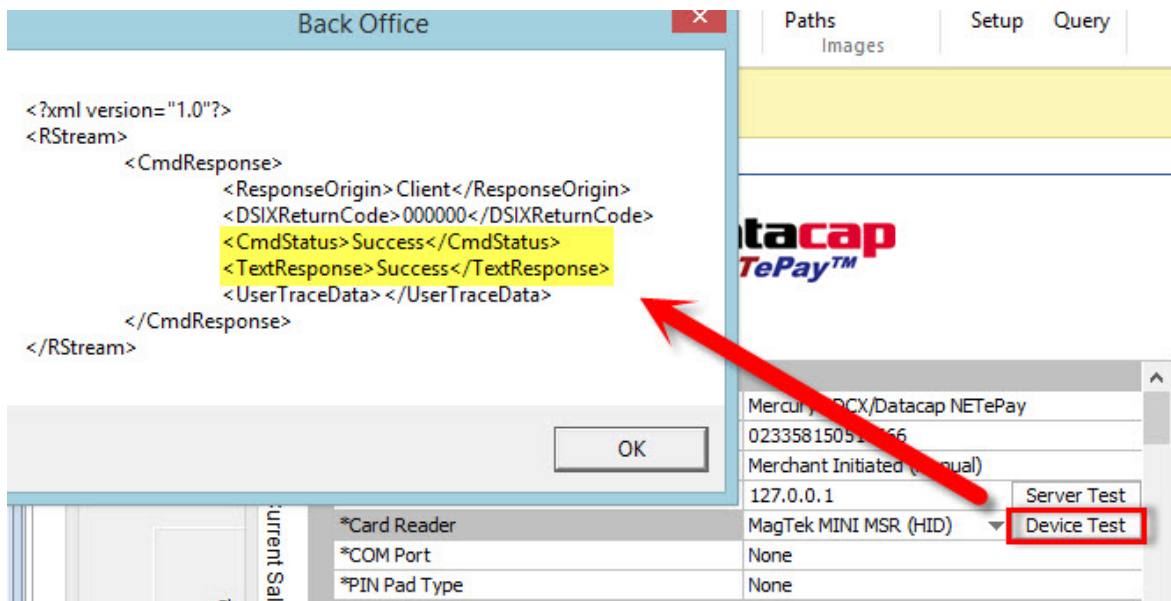
Keyboard Wedge Mode



4. Close and reopen the utility to verify that the current mode is set to **HID**.



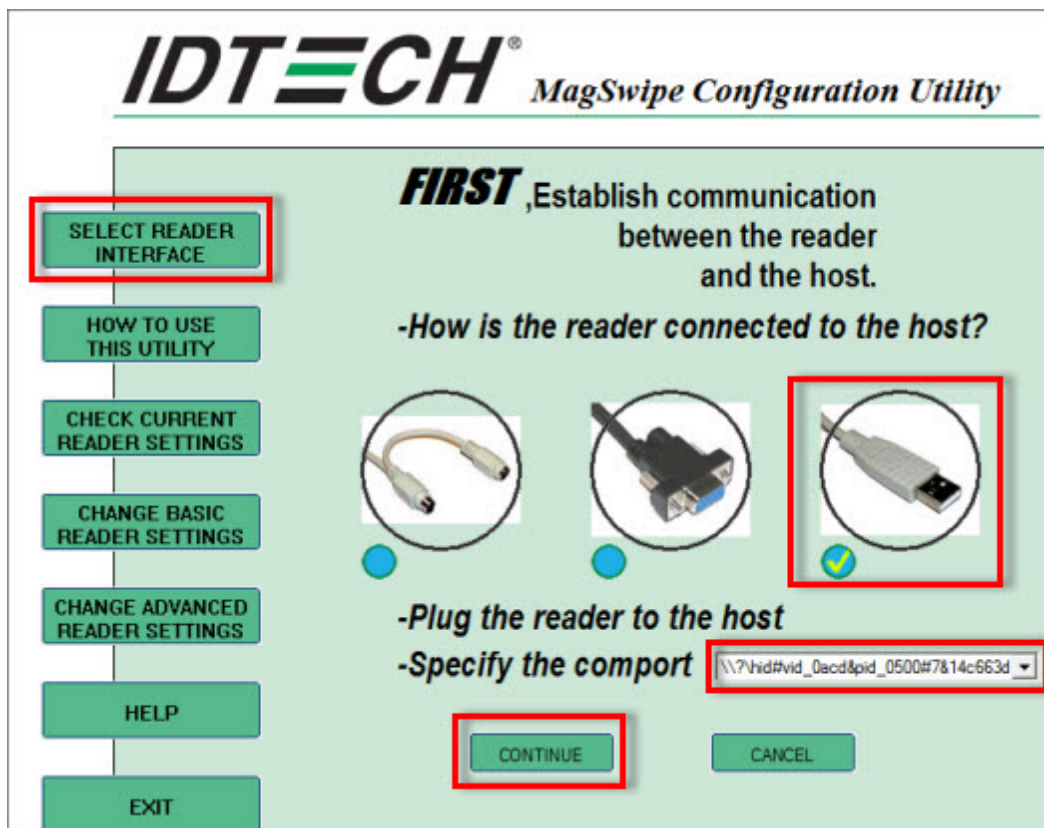
5. Verify that the device is compatible by clicking **Device Test** in **Back Office>Settings>Credit Cards**.



#### IDTech/Pos-X

IDTech and Pos-X card readers are included with many popular touchscreens such as those manufactured by Pos-X. The card reader can be converted from keyboard wedge to HID by downloading the **Magswipe Configuration Utility** from <http://www.amigopos.com/Support/DriverDownload>.

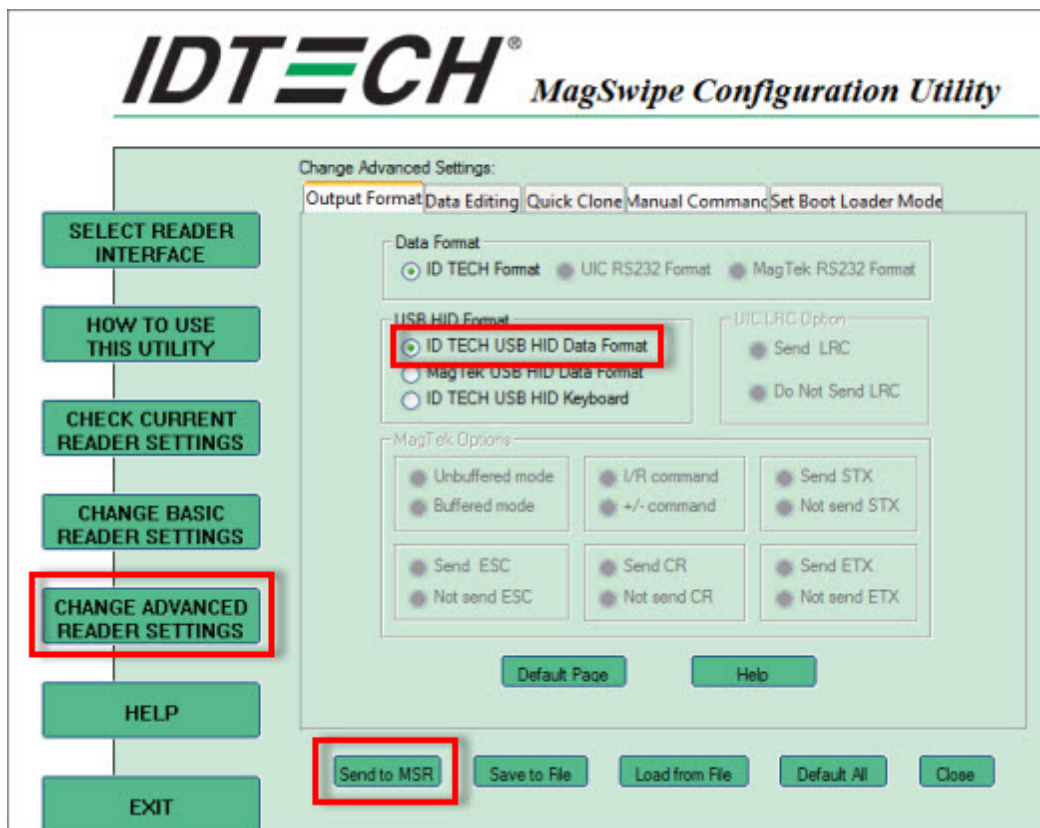
1. Install the utility. Rebooting is not required.
2. Click **SELECT READER INTERFACE** and select **USB**. The comport field should be set automatically. Click **CONTINUE**.



MagSwipe Configuration Utility Reader Interface

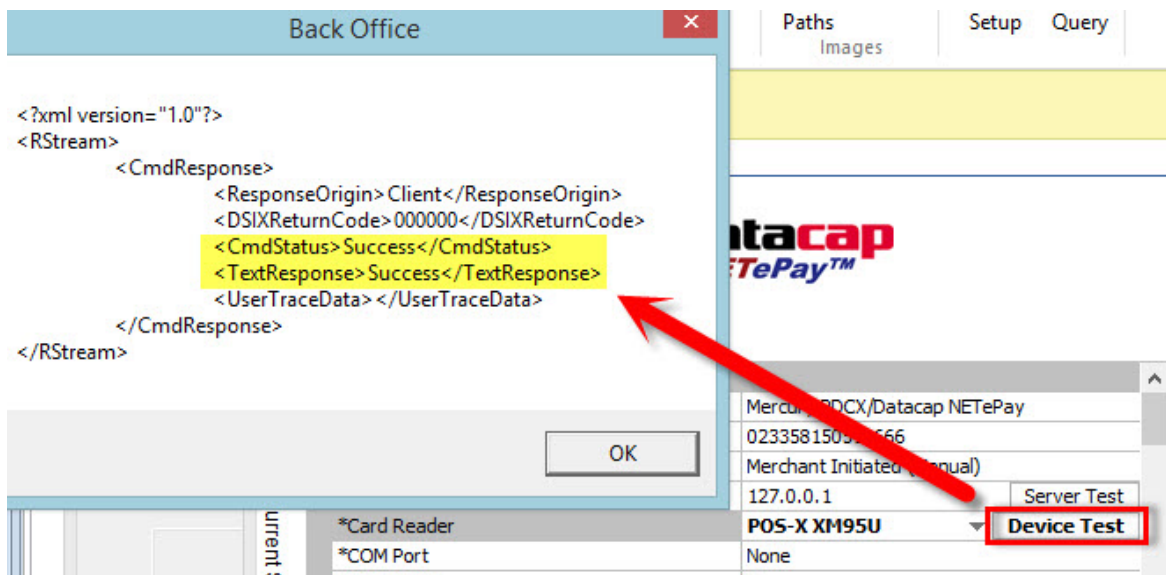
3. Click **CHANGE ADVANCED READER SETTINGS** and change the USB HID Format to **IDTech USB HID Format** and click **Send to MSR**. Windows will automatically detect the new reader interface and automatically install the required drivers. Click **EXIT** and uninstall the utility.





Magswipe Configuration Utility Advanced Settings

4. Verify that the device is compatible by clicking **Device Test** in **Back Office>Settings>Credit Cards**.



#### 10.5.4.4 Usage

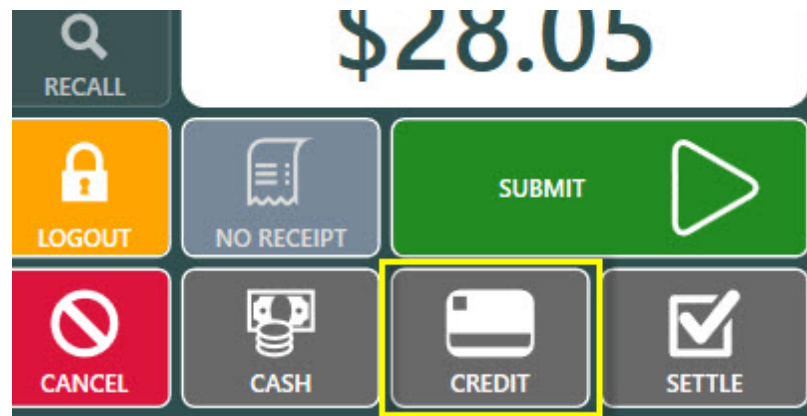
The transaction types listed below are available when using the PDCX integration method with either the Mercury Pay or Datacap NETePay integrated credit card processing interface.

- [SALE](#) <sup>355</sup>
- [DEBIT](#) <sup>359</sup>
- [VOICE AUTH](#) <sup>359</sup>
- [ADD TIP](#) <sup>363</sup>
- [VOID](#) <sup>367</sup>
- [REFUND](#) <sup>369</sup>
- [REVERSAL](#) <sup>372</sup>
- [ZERO AUTH](#) <sup>375</sup> (for Bar Tabs)

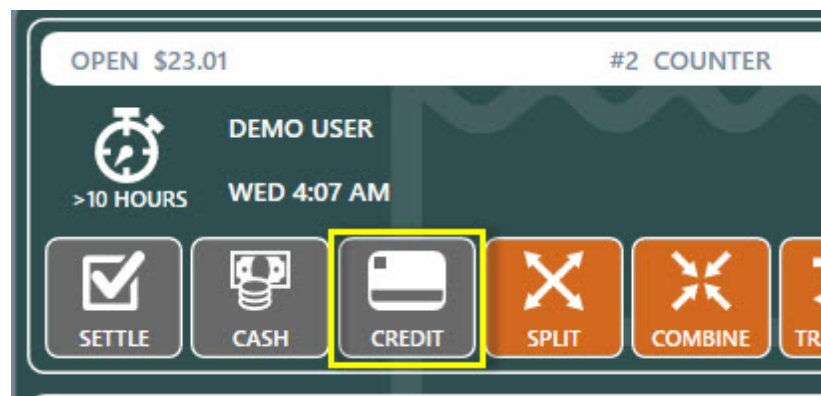
##### SALE

The SALE transaction type is used to process a payment on a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type). An approved sale transaction is added to the batch and will be settled at the next scheduled batch settlement and can be adjusted to add a tip before the batch is settled.

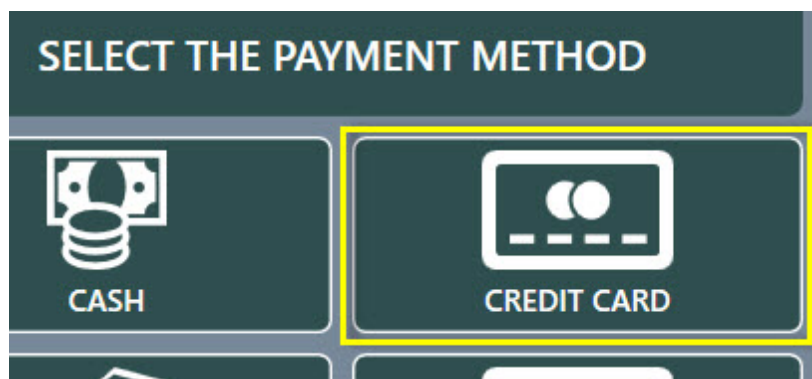
The SALE transaction can be initiated directly from the order entry screen, the order recall list or the settle screen.



Order Entry Screen



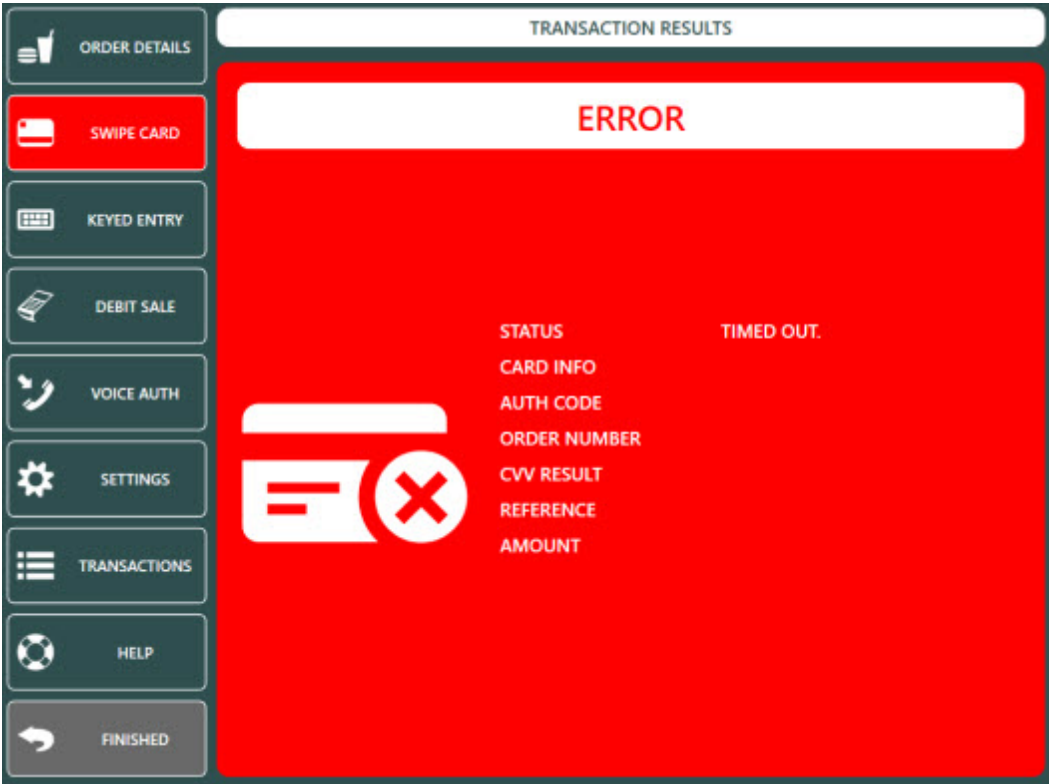
Order Recall List

**Settle Screen**

Press the CREDIT button to automatically initialize the card reader and display the card swipe prompt.

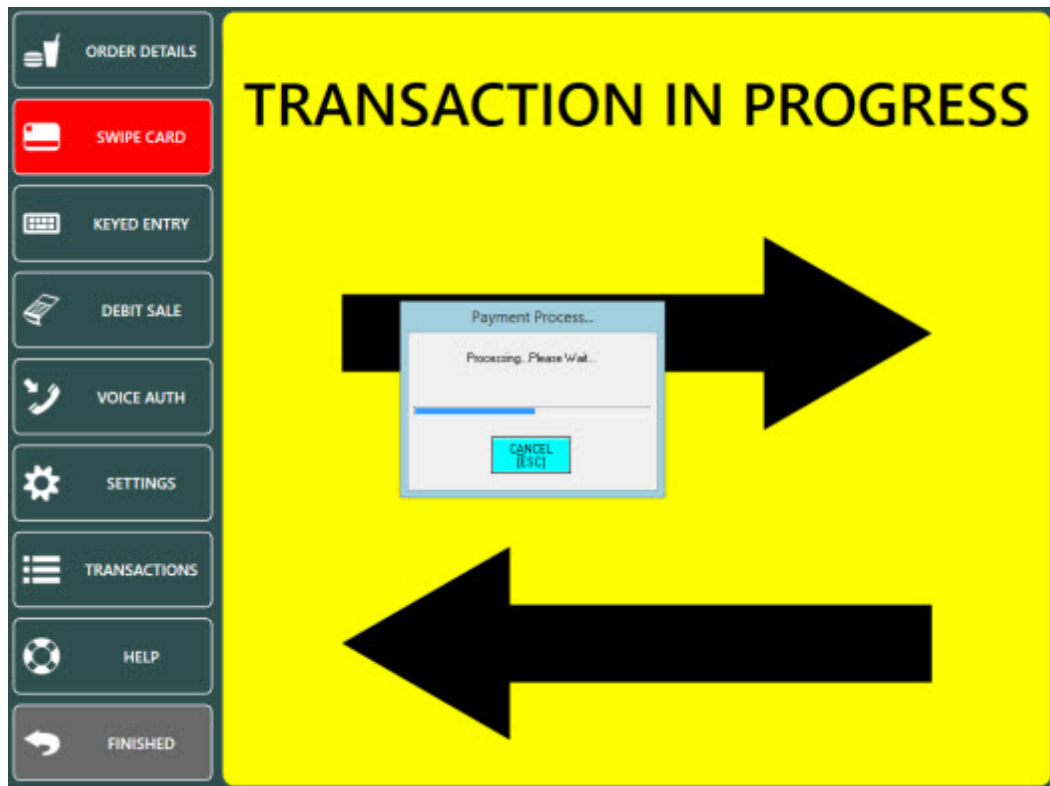
**Card Swipe Prompt**

The transaction is canceled if the card is not swiped within 20 seconds.

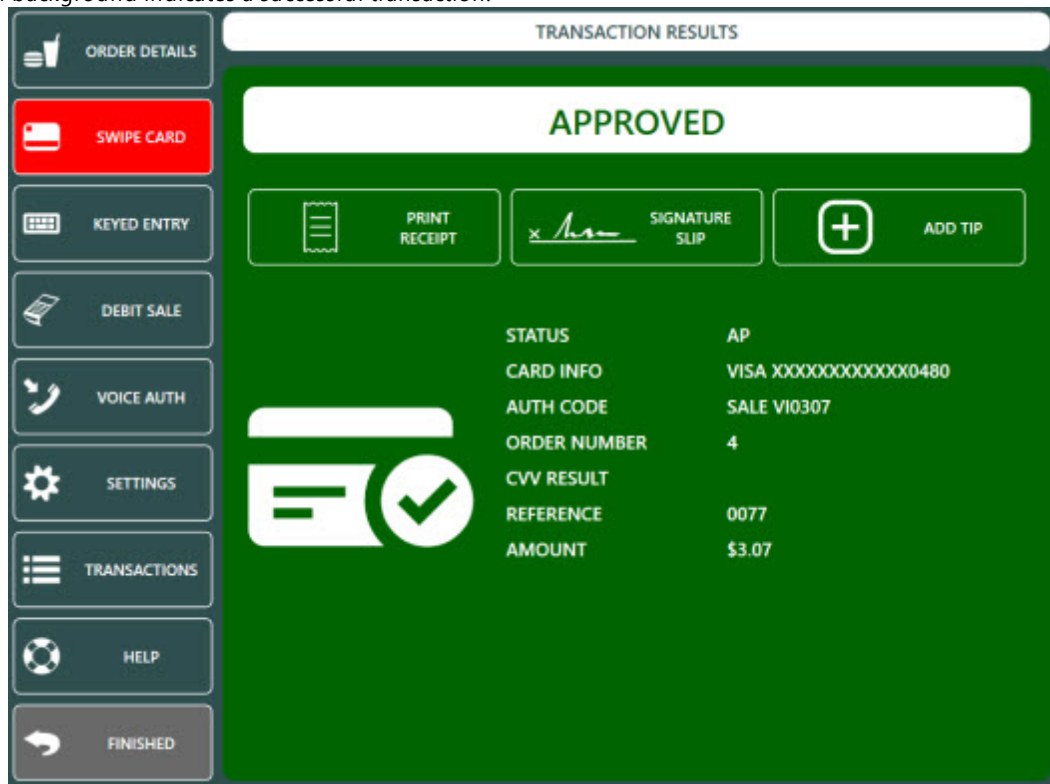


**Timeout Error**

The transaction is sent to the server. The "Processing...Please Wait" prompt is displayed until a response is received from the payment processor, generally in 3-5 seconds.

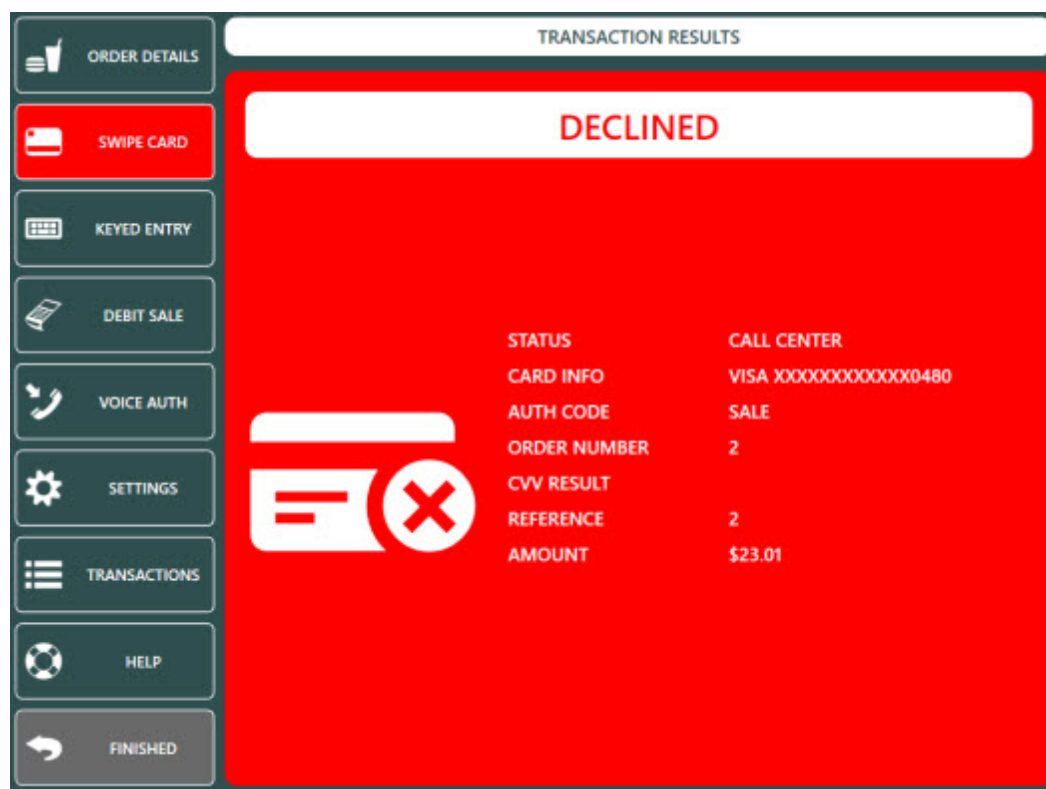


A green background indicates a successful transaction.



Successful SALE Transaction

A red background indicates a declined transaction or transaction error. The CALL CENTER message displayed below indicates that the cashier must call the payment processor to provide additional information before the transaction can be approved.



**Unsuccessful SALE Transaction**

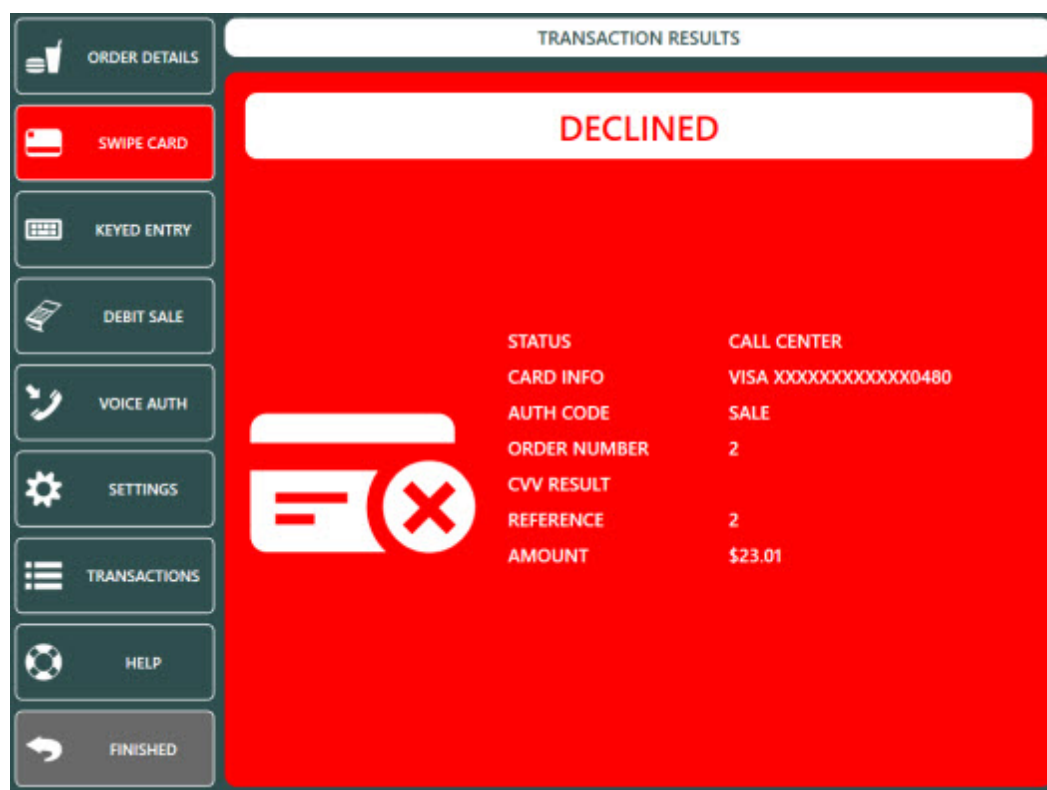
#### **DEBIT**

Debit card transactions require a compatible pinpad. Note that the ADD TIP transaction is not available for debit card transactions. An approved debit card transaction is added to the batch and will be settled at the next scheduled batch settlement.

#### **VOICE AUTH**

The VOICE AUTH transaction type is used to process a transaction for which a voice authorization code was previously obtained. If the payment processing network is unavailable, the merchant can call a voice number for an authorization. While this voice authorization assures the merchant that the card is good for the amount requested, it does not record the transaction for settlement and payment to the merchant's bank account. The VOICE AUTH transaction is used to place the previously voice authorized transaction in the current batch so that it will be settled and paid to the merchant.

A voice authorization is typically required when a SALE transaction is declined with the message CALL CENTER with a red background. Call the toll free number provided by the payment processor to obtain a numeric voice authorization code.

**Unsuccessful SALE Transaction**

If the credit card screen is still open, press the VOICE AUTH button. If the credit card screen is not open, select the order on the recall list and press the CREDIT button. Click cancel on the card swipe prompt and press the VOICE AUTH button. Enter the numeric voice authorization code received from the call center.

ORDER DETAILS

SWIPE CARD

KEYED ENTRY

DEBIT SALE

**VOICE AUTH**

SETTINGS

TRANSACTIONS

HELP

FINISHED

ENTER THE VOICE AUTHORIZATION CODE

IF THE PAYMENT PROCESSING NETWORK IS UNAVAILABLE, YOU CAN CALL A VOICE NUMBER FOR AN AUTHORIZATION. WHILE THIS VOICE AUTHORIZATION ASSURES YOU THAT THE CARD IS GOOD FOR THE AMOUNT REQUESTED, IT DOES NOT RECORD THE TRANSACTION FOR SETTLEMENT AND PAYMENT. THE VOICEAUTH TRANSACTION IS USED TO PLACE THE PREVIOUSLY VOICE AUTHORIZED TRANSACTION IN THE CURRENT BATCH SO THAT IT WILL BE SETTLED AND PAID.

123456

CANCEL

1 2 3

4 5 6

7 8 9

0

▶

**Voice Authorization Code Entry**

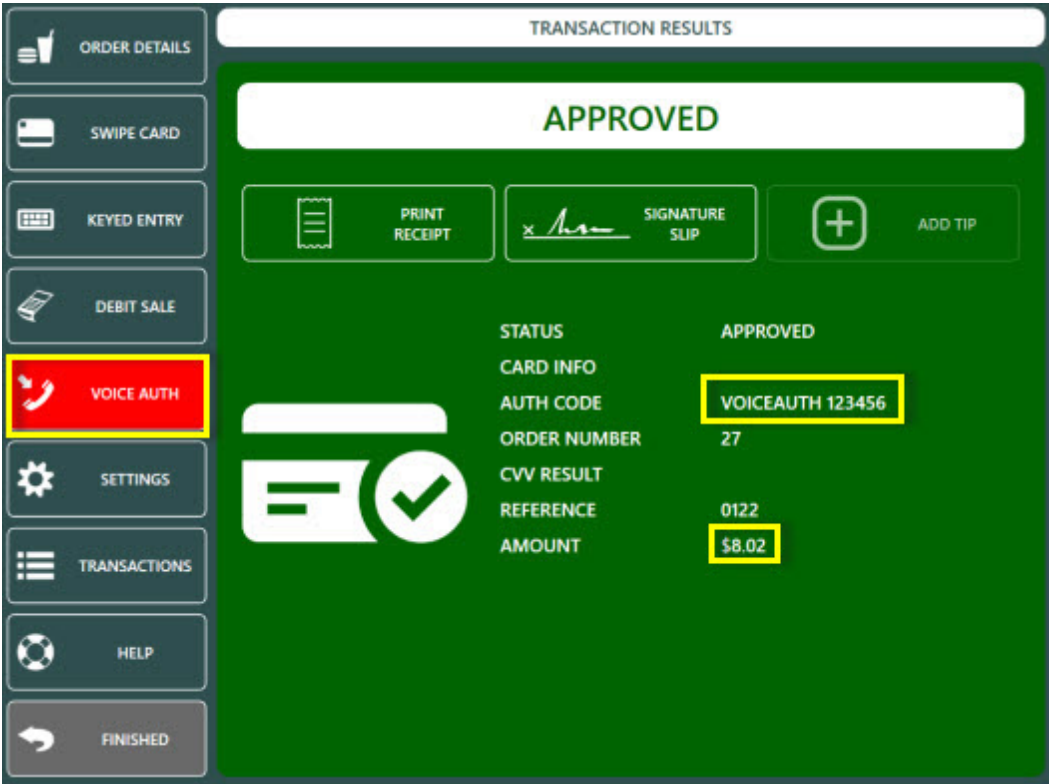
Enter the sale amount and press the green button to process the transaction.



The screenshot shows the AmigoPOS 8 interface. On the left is a vertical menu with icons and labels: ORDER DETAILS, SWIPE CARD, KEYED ENTRY, DEBIT SALE, VOICE AUTH (highlighted with a red background), SETTINGS, TRANSACTIONS, HELP, and FINISHED. The main area is titled 'ENTER THE VOICE AUTH CHARGE AMOUNT'. It features a large yellow box displaying '\$8.02' and a blue left arrow button. Below this is a grey 'CANCEL' button. A numeric keypad with buttons 1-9 and 0 is present. At the bottom right, there is a large green box with a white play button icon, which is highlighted with a yellow border.

**Voice Authorization Amount**

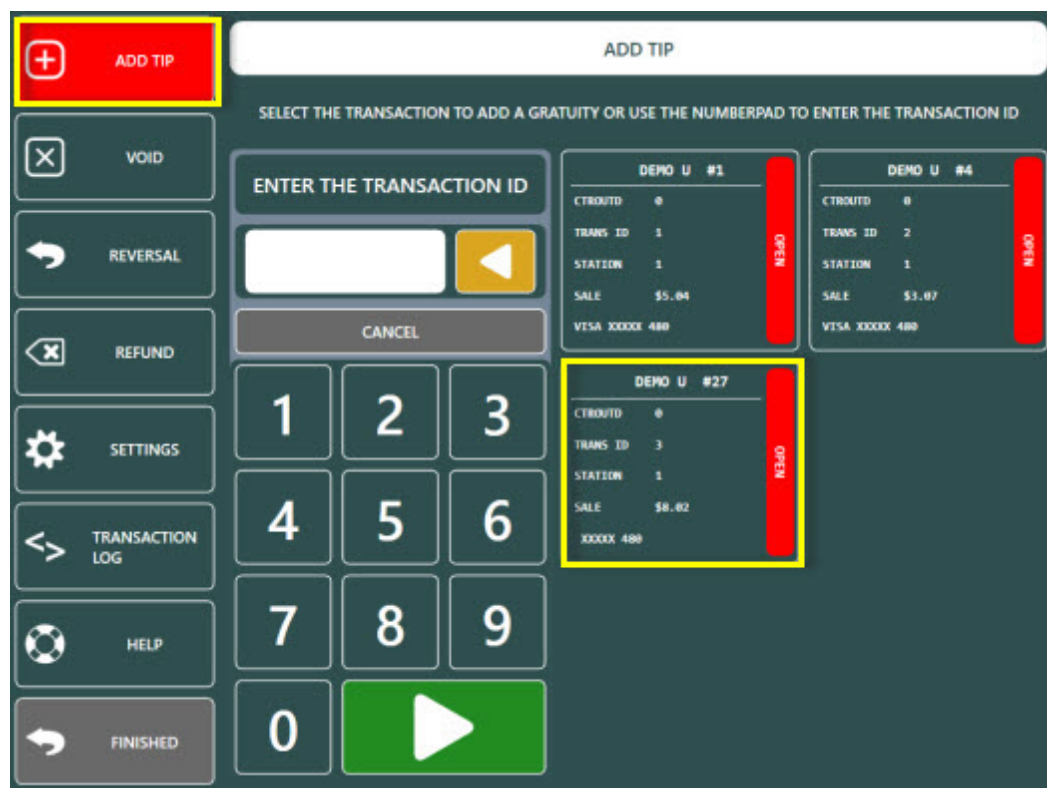
An approved VOICE AUTH transaction is displayed with a green background. The auth code and authorized amount are included in the results for confirmation. An approved VOICE AUTH transaction is added to the batch and will be settled at the next scheduled batch settlement.



Transaction Results

**ADD TIP**

The ADD TIP transaction type is used to add or adjust the tip amount on a previously processed SALE transaction. An incorrect tip amount can be corrected by running an additional ADD TIP transaction for the correct amount.

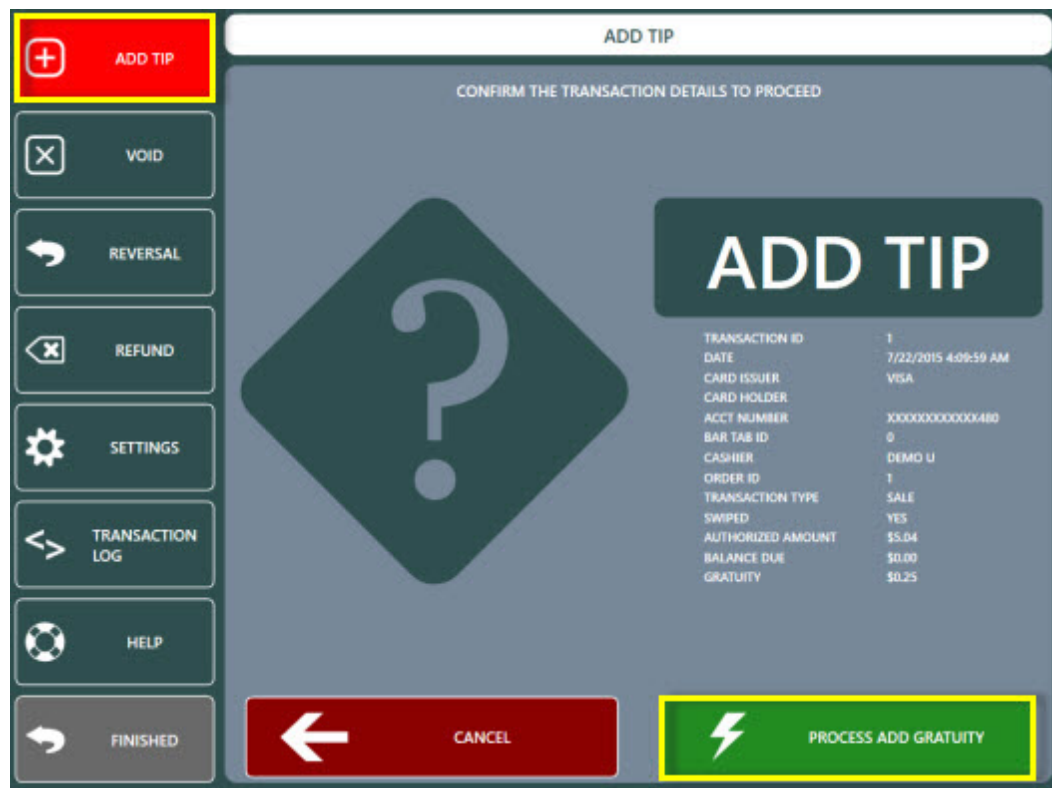
**Transactions List**

Login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad.

The screenshot displays the 'Tip Amount Entry' interface. On the left is a vertical sidebar with buttons: 'ADD TIP' (red with a plus icon), 'VOID' (with an 'X' icon), 'REVERSAL' (with a curved arrow icon), 'REFUND' (with an 'X' and arrow icon), 'SETTINGS' (with a gear icon), 'TRANSACTION LOG' (with a double arrow icon), 'HELP' (with a lifebuoy icon), and 'FINISHED' (with a curved arrow icon). The main panel is titled 'ENTER THE GRATUITY AMOUNT'. It includes a large yellow rectangular input field, a brown button with a left-pointing arrow, a grey 'CANCEL' button, a numeric keypad with buttons for digits 1-9 and 0, and a large green button with a right-pointing arrow. The green button is highlighted with a yellow border.

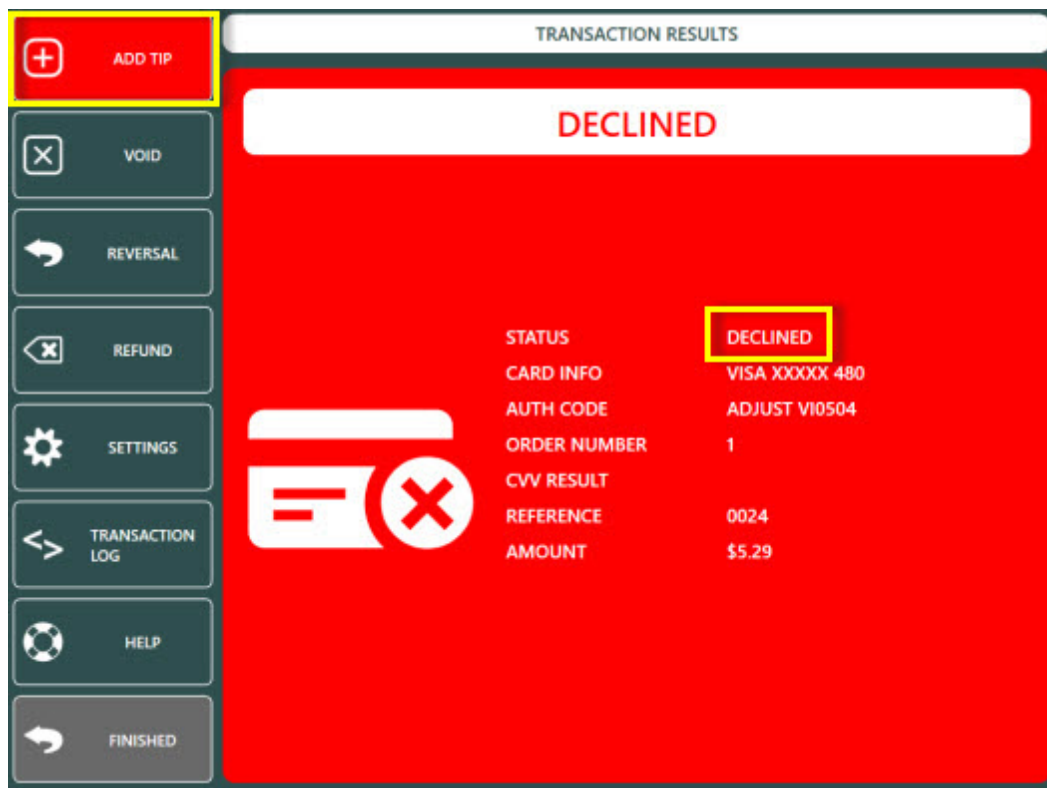
**Tip Amount Entry**

Review the transaction information shown on the confirmation screen and press the green button to process the transaction.



**Add Tip Confirmation**


A successful ADD TIP transaction is displayed with a green background. An unsuccessful ADD TIP transaction is displayed with a red background. In the example below, the ADD TIP transaction is declined because the SALE transaction was previously voided.



Transaction Results

**VOID**

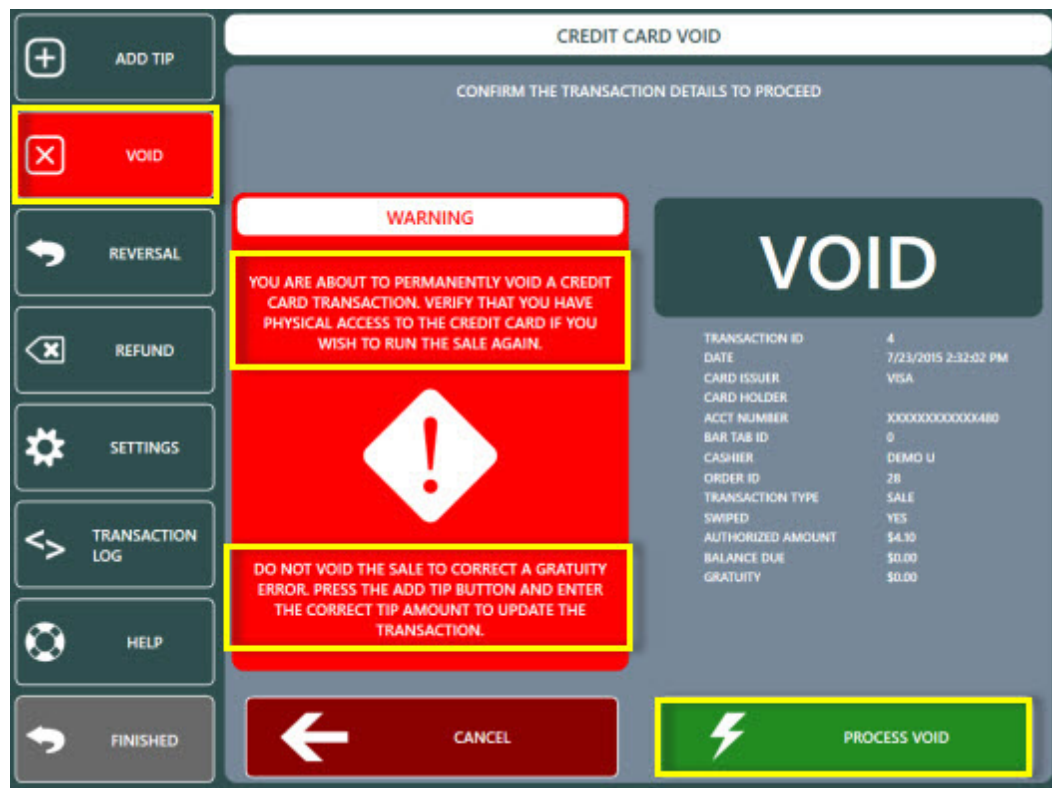
The VOID transaction type is used to void a previously completed sale (payment) transaction in the current batch on a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type).



**Warning: A credit card void is permanent and cannot be reversed**

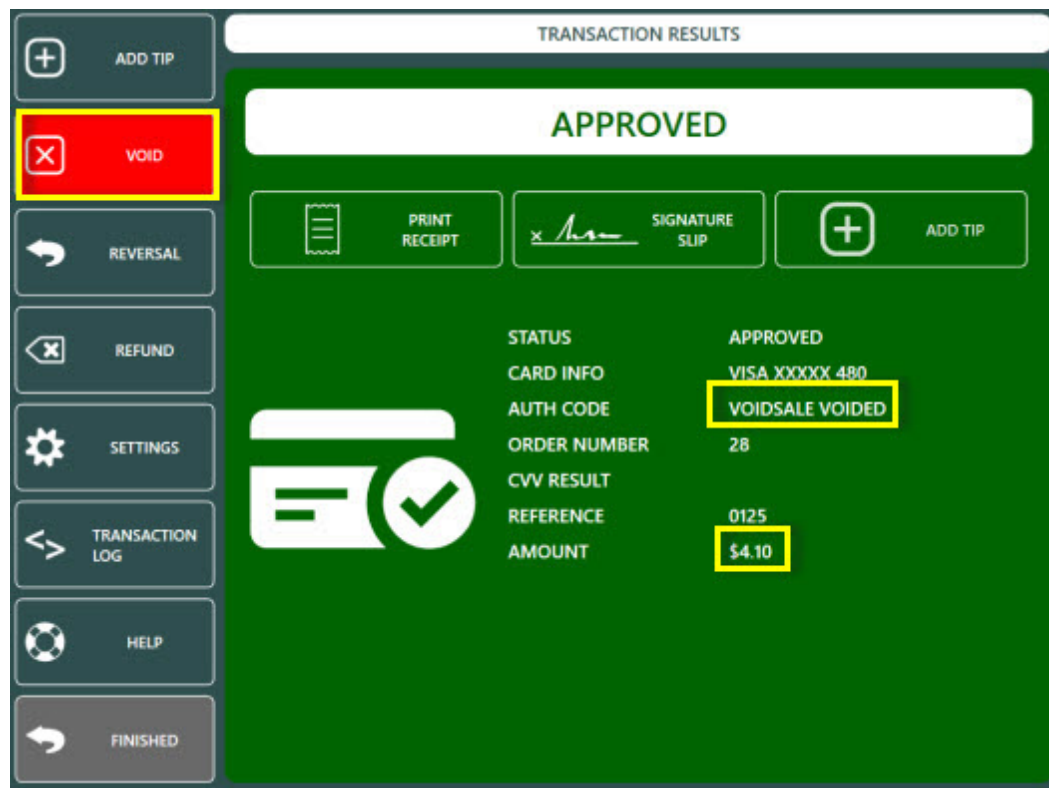
**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

Login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Press the VOID button and select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad. Review the transaction information shown on the confirmation screen and press the green button to process the VOID transaction.



#### Void Confirmation

A successful VOID transaction is displayed with a green background. An unsuccessful VOID transaction is displayed with a red background.



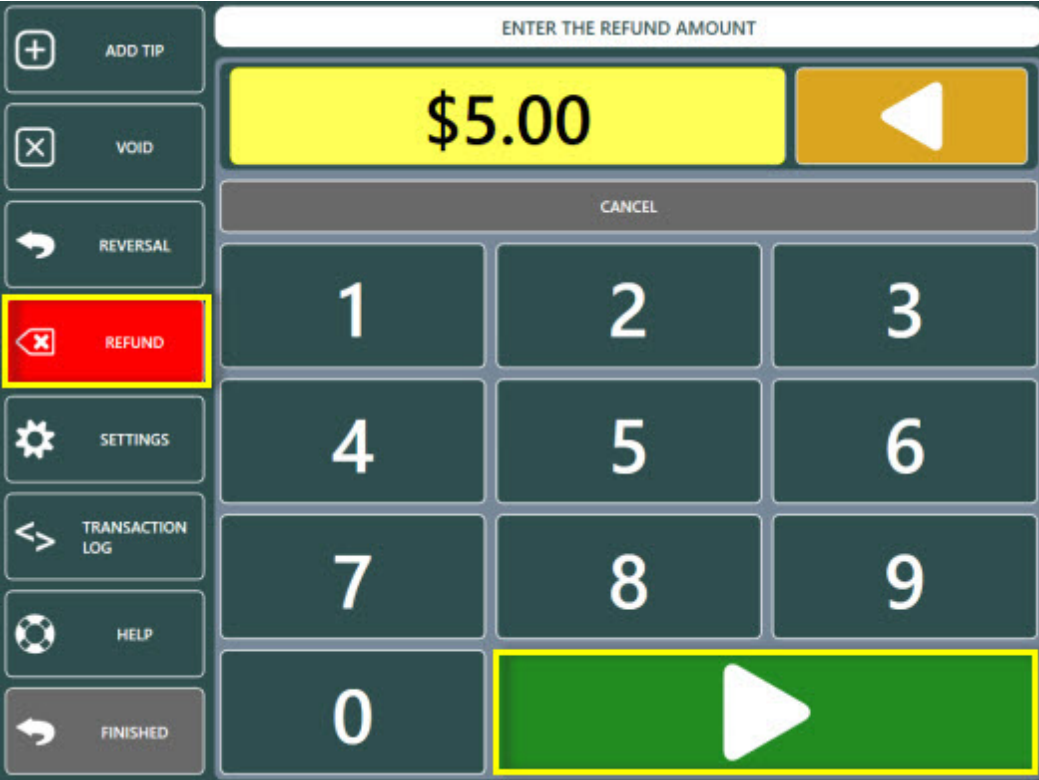
Transaction Results

**REFUND**

The REFUND transaction type is used to process a return (Mercury Pay and NETePay refer to a refund as a RETURN transaction) to a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type).

To start a refund transaction, recall the order and press the CREDIT button. Click Cancel on the card swipe prompt and press the REFUND button to enter the refund amount using the on-screen number pad.

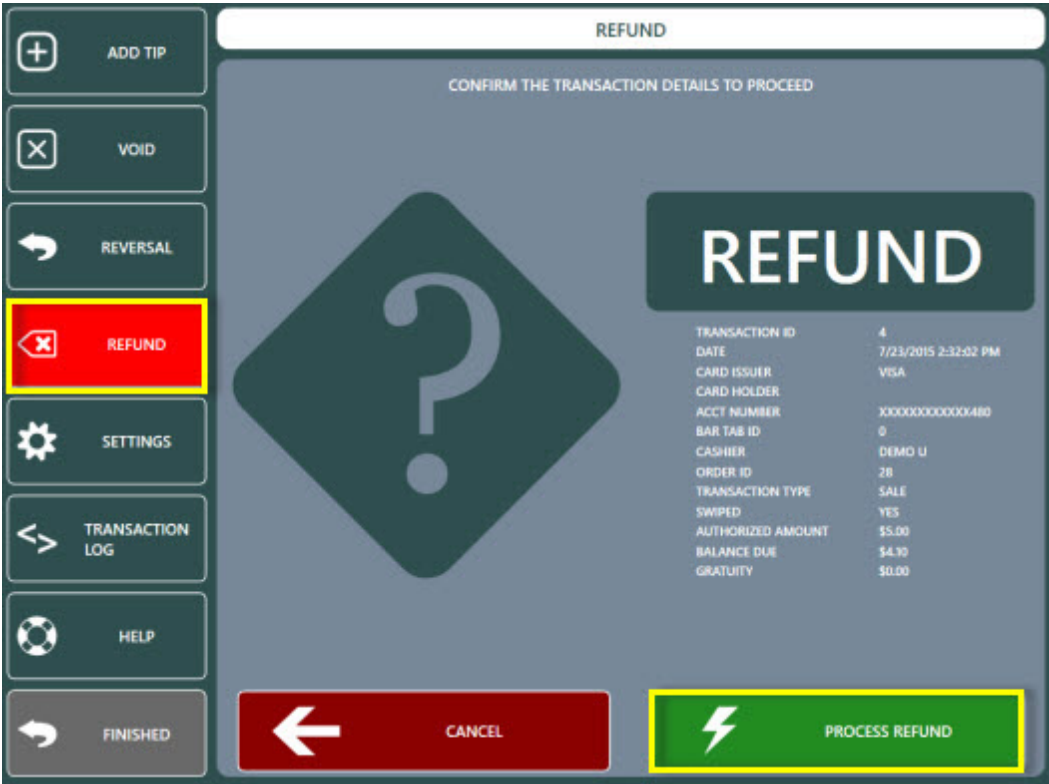




The image shows the 'Refund Amount Entry' screen in AmigoPOS 8. The screen has a dark grey background. On the left is a vertical sidebar with buttons: '+ ADD TIP', 'X VOID', '↩ REVERSAL', 'REFUND' (highlighted with a red border and a red 'X' icon), '⚙ SETTINGS', '↔ TRANSACTION LOG', '🛟 HELP', and '↩ FINISHED'. The main area at the top has a white header 'ENTER THE REFUND AMOUNT'. Below it is a large yellow display showing '\$5.00' and a blue left arrow button. Under the display is a grey 'CANCEL' button. Below that is a numeric keypad with buttons 1-9 and 0. At the bottom right of the keypad is a large green button with a white right arrow, which is highlighted with a yellow border.

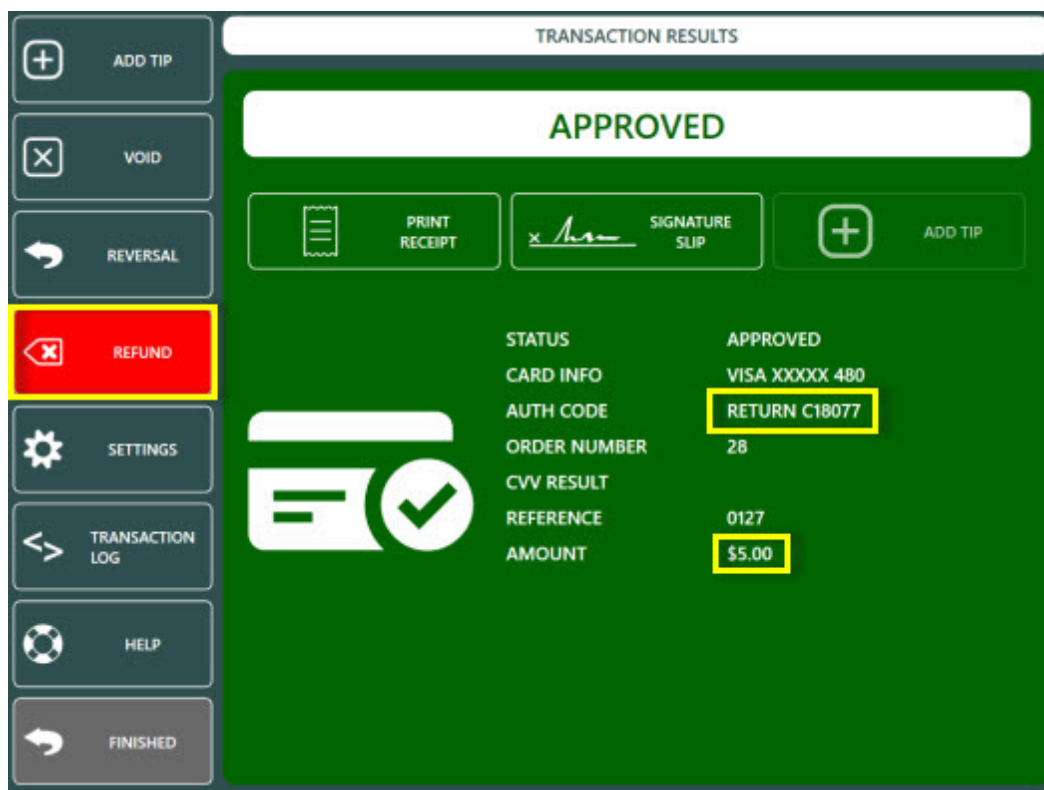
**Refund Amount Entry**

Review the transaction information shown on the confirmation screen and press the green button to process the REFUND transaction.



Refund Confirmation


A successful REFUND transaction is displayed with a green background. An unsuccessful REFUND transaction is displayed with a red background.



Transaction Results

**REVERSAL**

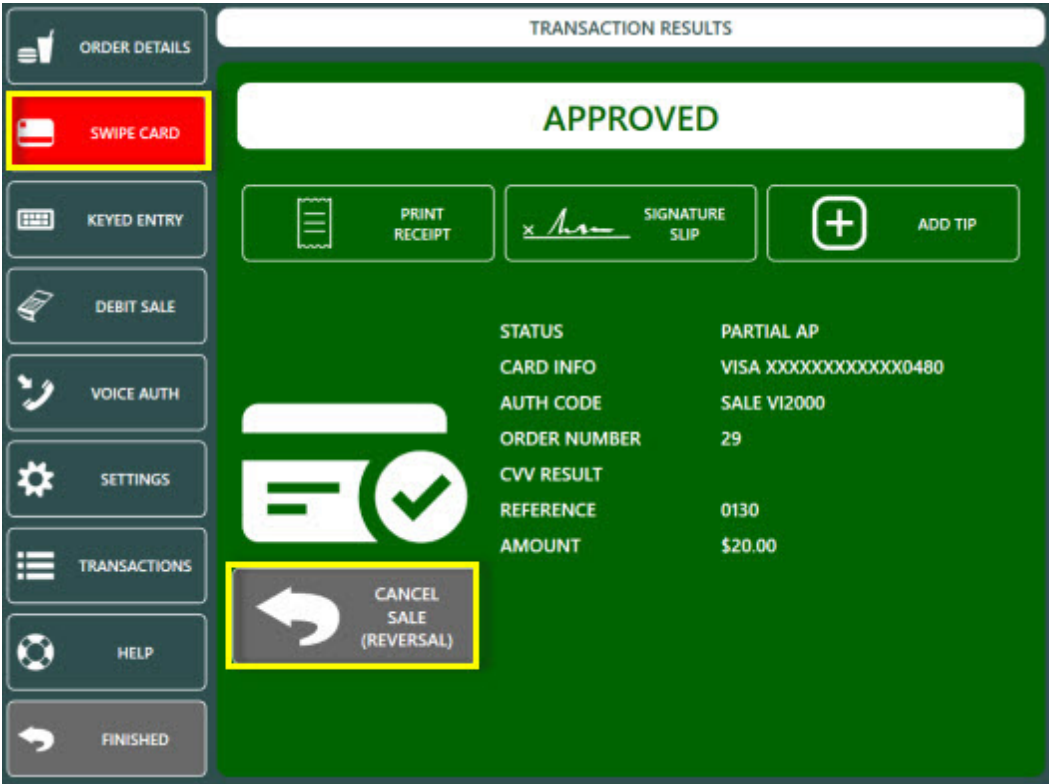
The REVERSAL transaction type is used to void a previous SALE transaction. REVERSAL differs from the VOID transaction type in that the funds are returned to the customer's card immediately upon a successful REVERSAL transaction. A VOID transaction will return the funds to the customer's card within 3-7 days. The REVERSAL transaction is available only for SALE transactions in the current batch.



**Warning: A credit card void is permanent and cannot be reversed**

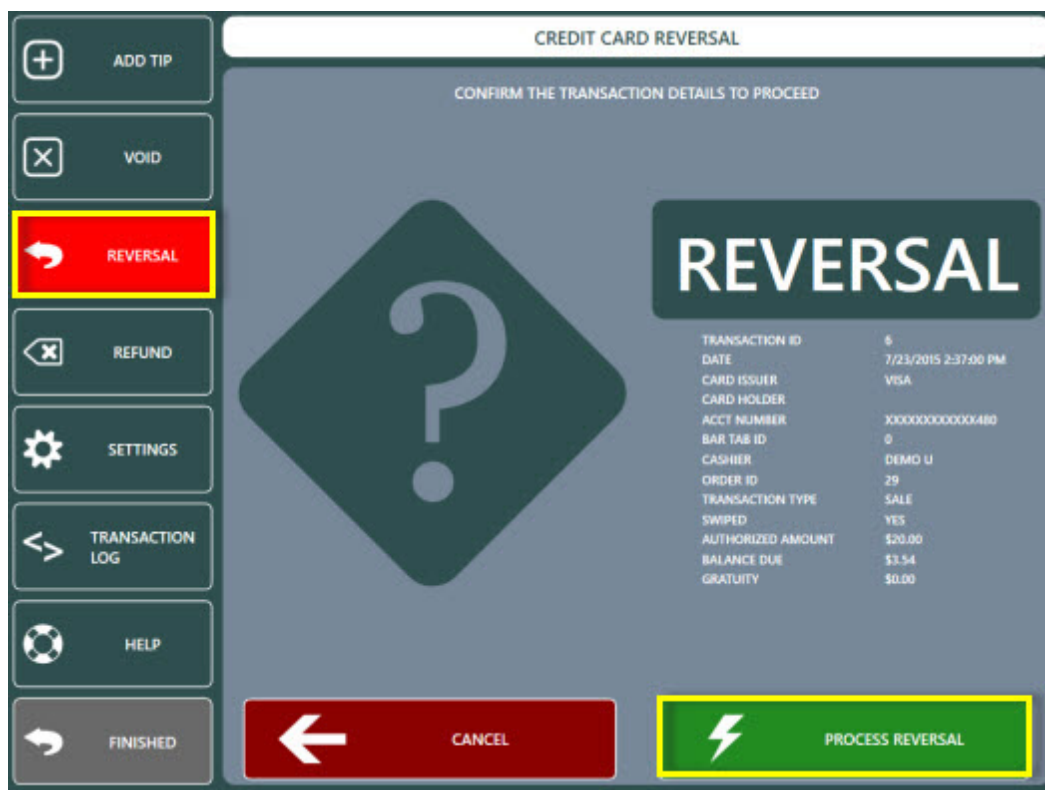
**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

A typical scenario for a REVERSAL transaction is when a prepaid card is authorized for a partial amount of the balance due and the customer wishes to use a different card. A successful SALE transaction displays the REVERSAL button on the results screen. If the credit card screen is not open, login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Press the REVERSAL button at the left and select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad.



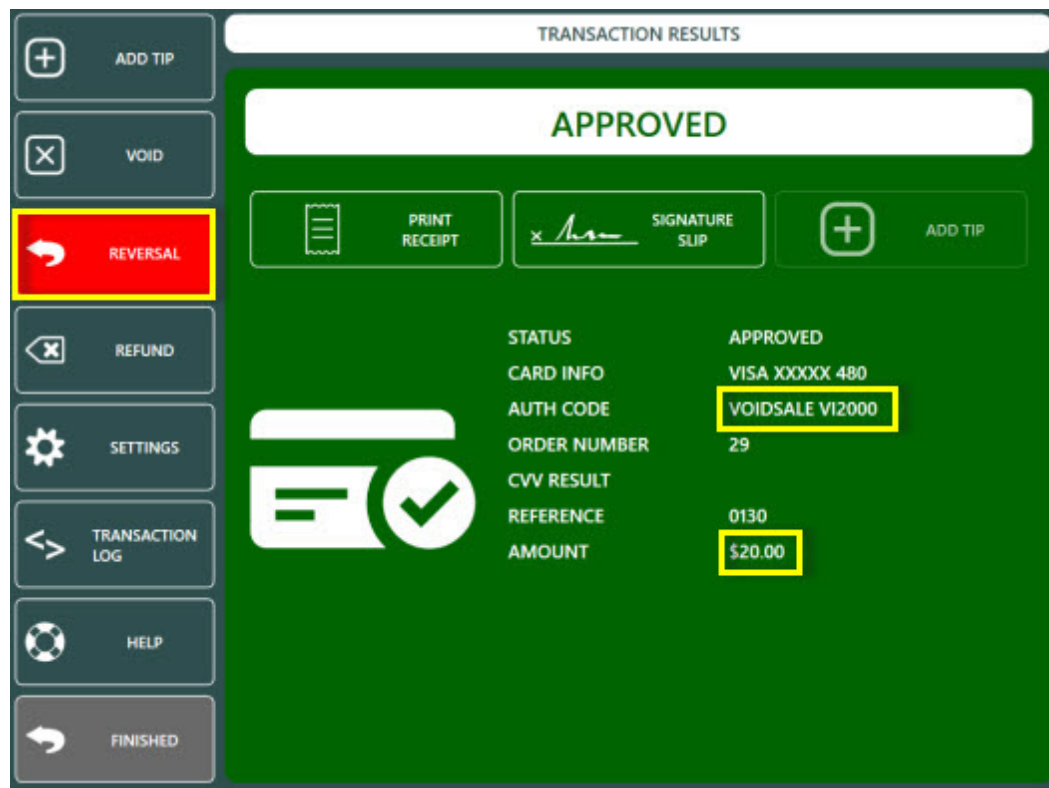
**SALE Transaction Results**

Review the transaction information shown on the confirmation screen and press the green button to process the REVERSAL transaction.



**Reversal Confirmation**

A successful REVERSAL transaction is displayed with a green background. An unsuccessful REVERSAL transaction is displayed with a red background.

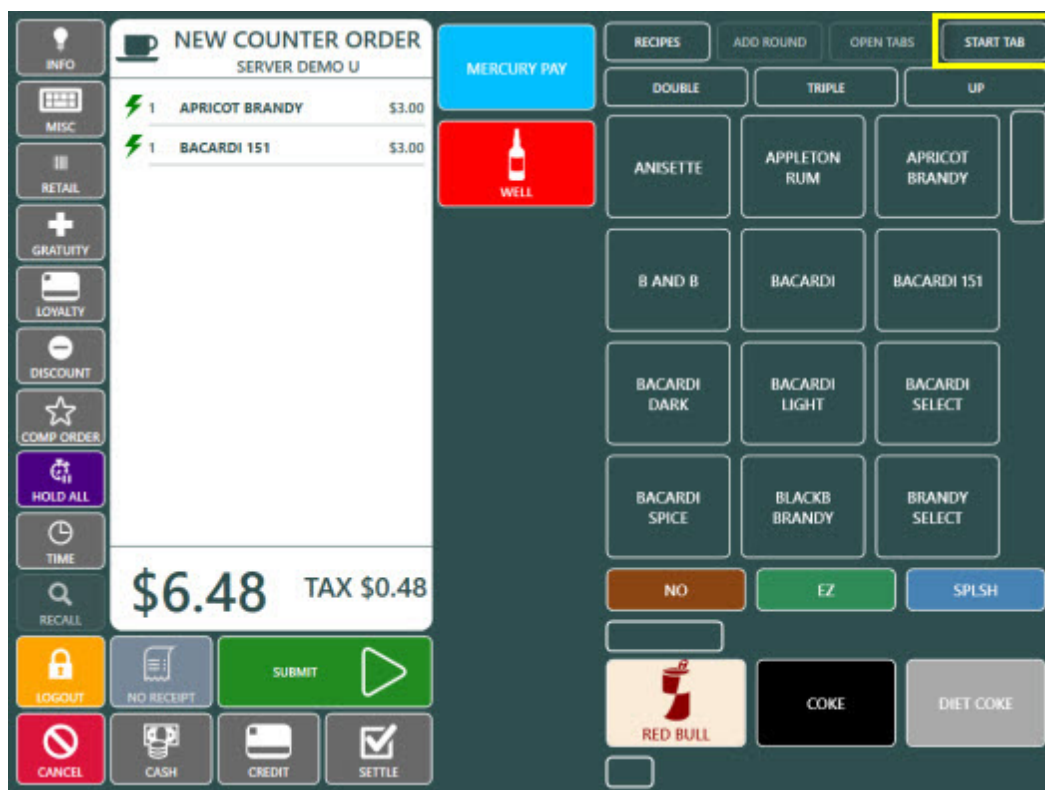


Transaction Results

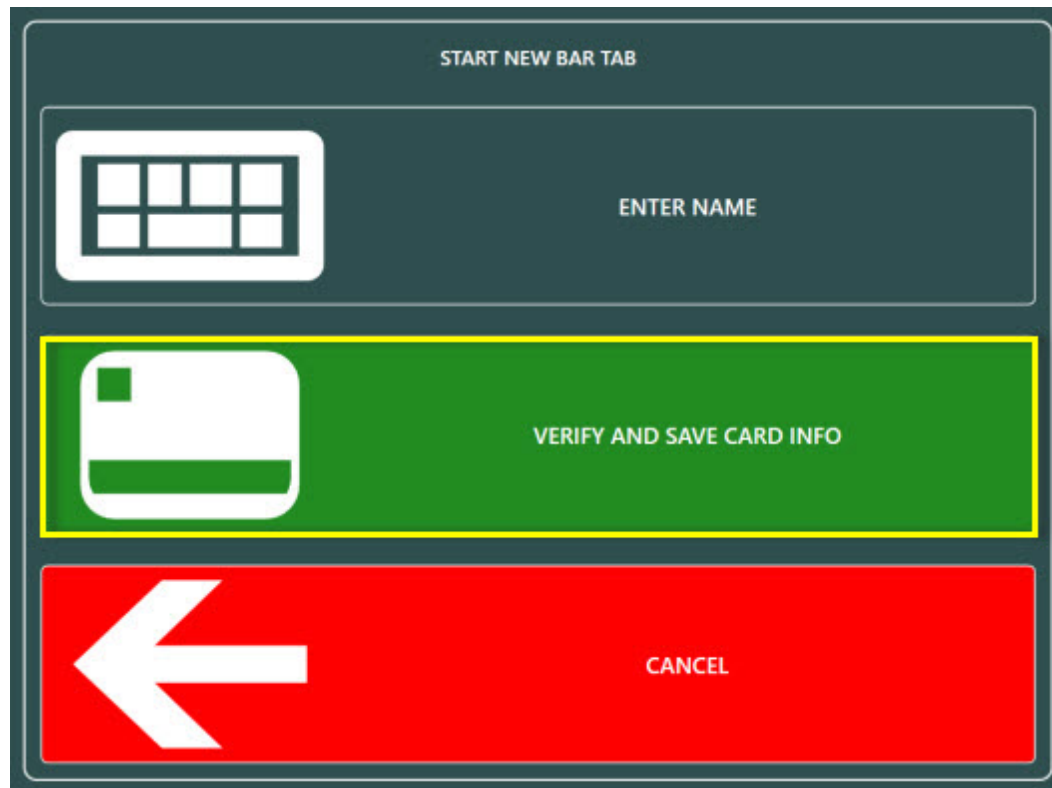
**ZERO AUTH**

The ZERO AUTH transaction type is used to inquire whether a credit card is valid for processing without charging any amount. The POS uses the ZERO AUTH transaction only when starting a new bar tab and does not charge the customer's card but does store a token that is returned from the payment processor if the ZERO AUTH transaction is approved. The token is later used to process a SALE transaction for the balance due, and any subsequent adjustments such as adding a tip.

Start a bar order and press the START TAB button at the top left.

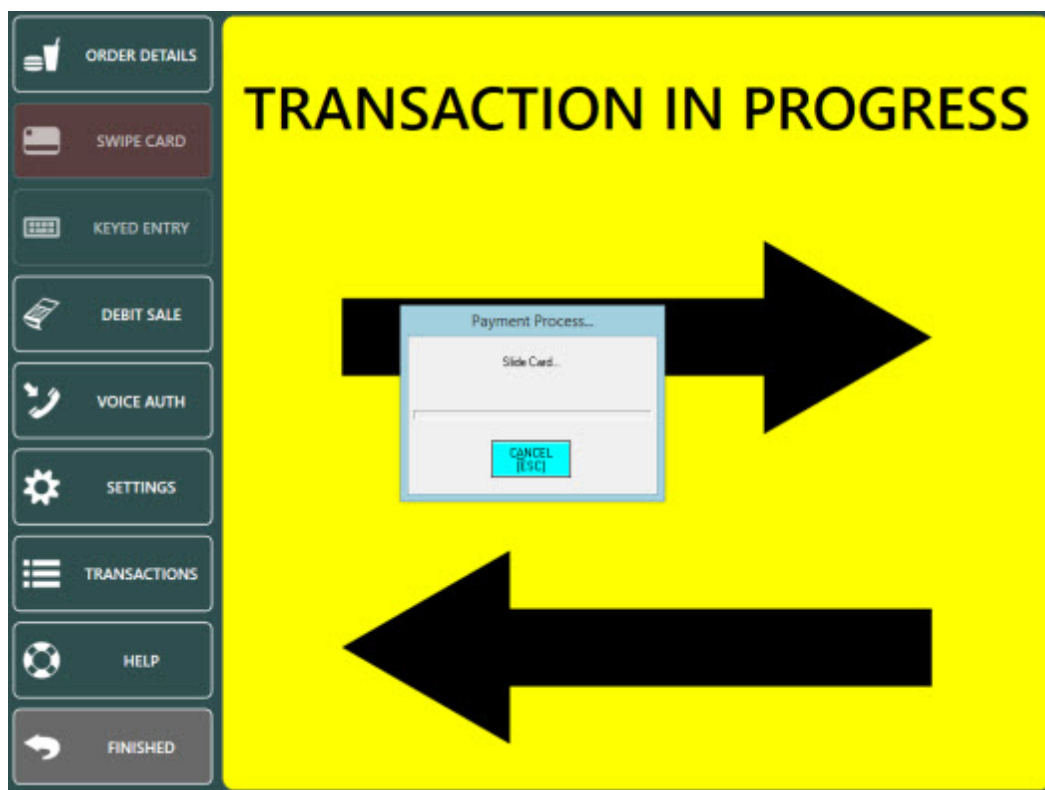
**Start Bar Tab**

Select VERIFY AND SAVE CARD INFO on the new bar tab screen.

**Select Bar Tab Method**

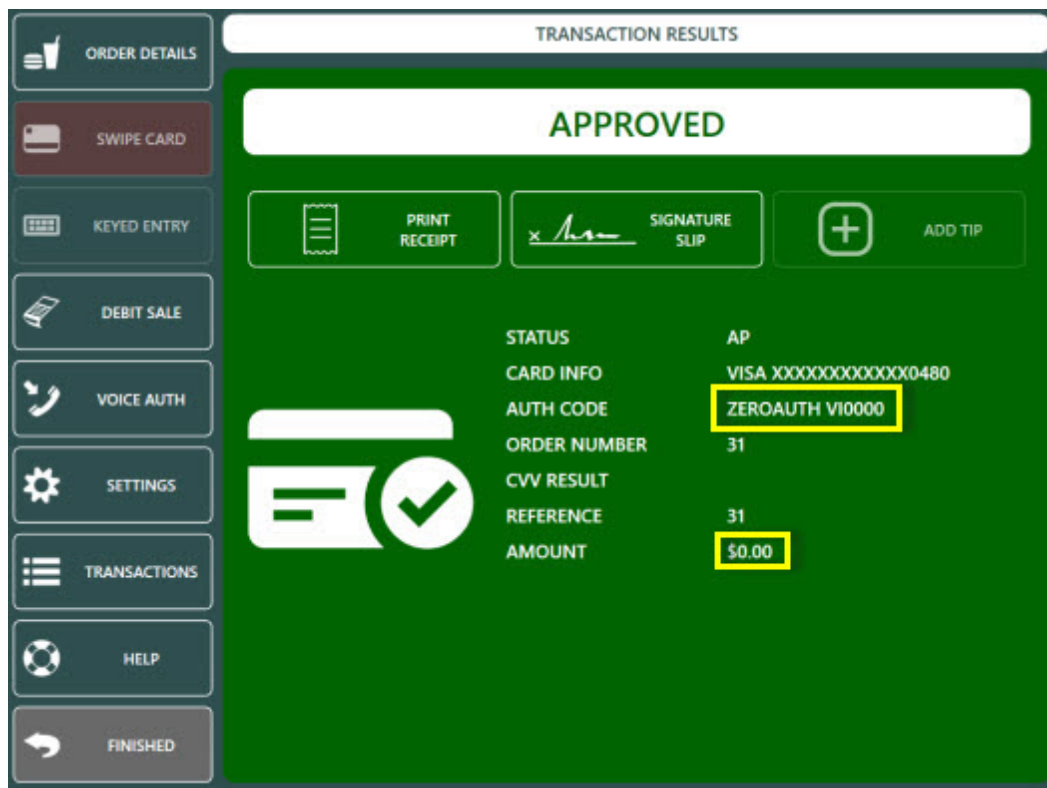
Swipe the card to process the ZERO AUTH transaction. The transaction is canceled if the card is not swiped within 20 seconds.





**Card Swipe Prompt**

A successful ZERO AUTH transaction is displayed with a green background. An unsuccessful ZERO AUTH transaction is displayed with a red background.



Transaction Results

When the customer is ready to make payment, locate the order on the recall list and press the CAPTURE button.



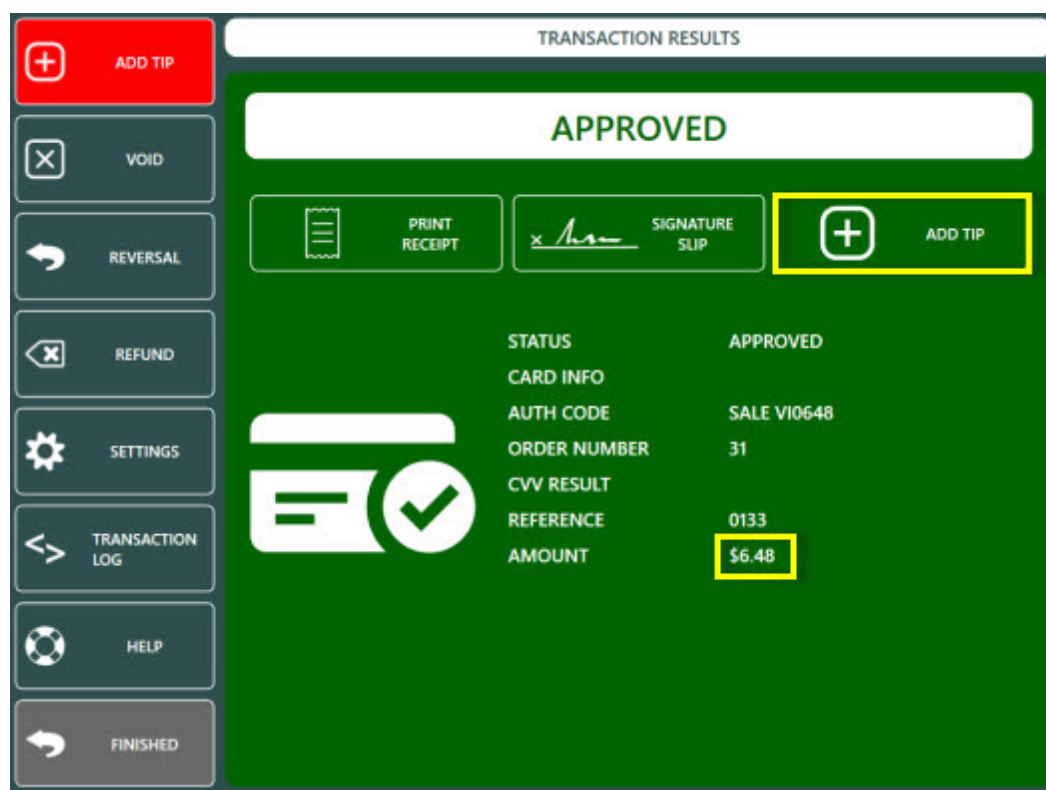
Order Recall List

Review the transaction information shown on the confirmation screen and press the green button to process the SALE transaction.

SETTLE BAR TAB	
CONFIRM THE TRANSACTION DETAILS TO PROCEED	
<div>TRANSACTION ID7</div> <div>DATE7/23/2015 2:48:07 PM</div> <div>CARD ISSUERVISA</div> <div>CARD HOLDER</div> <div>ACCT NUMBERXXXXXXXXXXXX480</div> <div>BAR TAB ID1</div> <div>CASHIERDEMO U</div> <div>ORDER ID31</div> <div>TRANSACTION TYPE</div> <div>SWIPEDYES</div> <div>AUTHORIZED AMOUNT\$0.00</div> <div>BALANCE DUE\$6.48</div> <div>GRATUITY\$6.48</div>	

#### Sale Transaction Confirmation

A successful SALE transaction is displayed with a green background. An unsuccessful SALE transaction is displayed with a red background. If the customer has specified a gratuity on the signature slip, press the ADD TIP button to adjust the SALE transaction.



Transaction Results

## 10.5.5 E2E

### 10.5.5.1 Overview

End to end encryption (abbreviated E2E) is the process of encrypting payment card data at the magnetic stripe reader or "at the point of swipe." The advantage of E2E is that the card data does not persist on the POS system. Without E2E encryption, card data is swiped into the POS through the mag stripe reader in clear text at which point the data is encrypted or d by the POS. There is a split second where the data is not encrypted and that's all data thieves need. Mercury's end-to-end encryption product facilitates secure card present transactions for E2E encrypted devices. End-to-end encryption reduces the number of systems handling sensitive card data. When an encrypted card reader is used, sensitive cardholder data is removed from the payment application and the merchant's's PCI efforts are simplified.

Encrypting cardholder data at the time of swipe and throughout the transaction renders the data useless to thieves. Since cardholder data is never exposed or available in the clear past the point of swipe, P2PE significantly reduces the risk of a card data compromise by reducing the opportunity an attacker has to steal clear-text data from their environment.

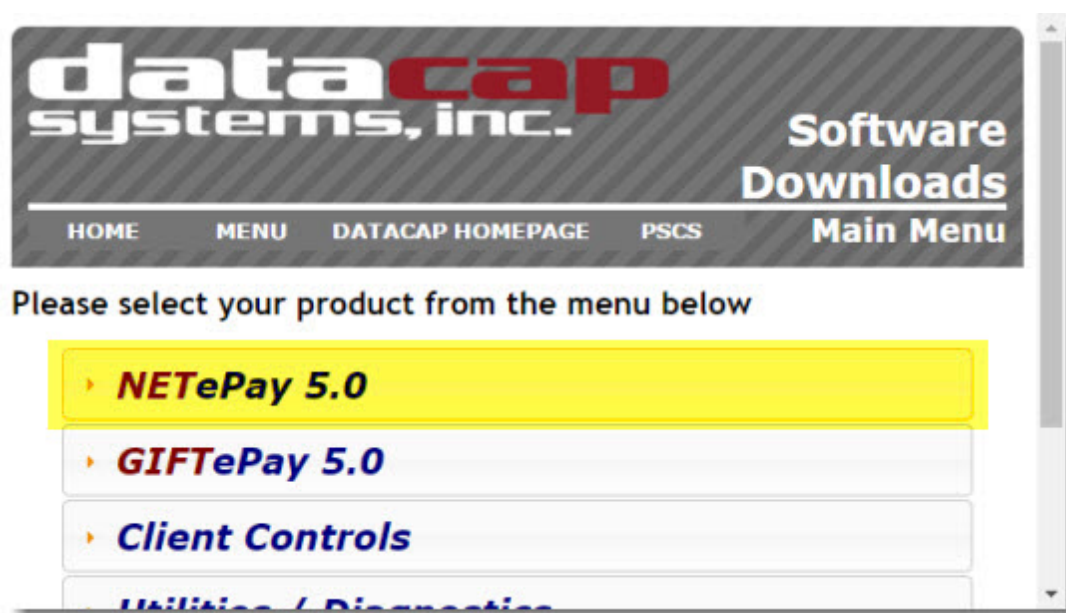
#### Prerequisites

- Obtain a merchant account from Vantiv specifically for Mercury E2E
- Install and configure [Datacap NETePay for Mercury In-Store](#)<sup>[336]</sup>
- Install the [Verifone VX805](#)<sup>[342]</sup> USB driver and attach the VX805 to the pos station

### 10.5.5.2 Settings

#### Initial Setup

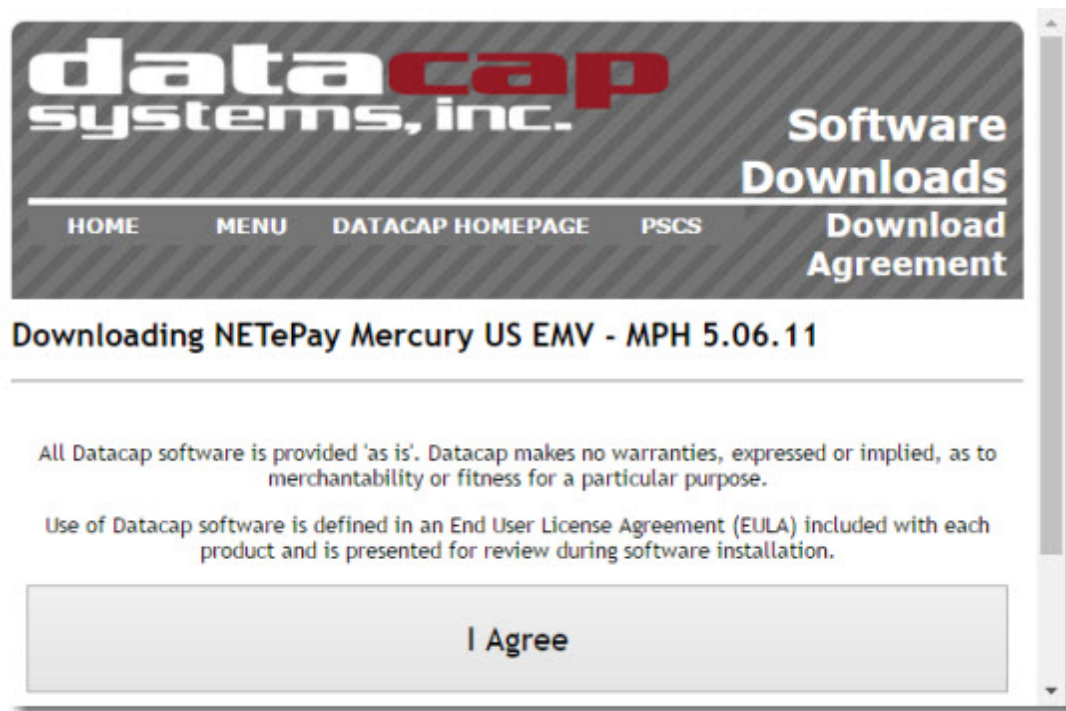
- 1) Contact your account representative at Mercury Payment Systems (<http://www.mercurypay.com>) to obtain your merchant number.
- 2) Download and install Datacap NETePay for Mercury "In-Store" from <http://www.datacapepay.com/downloadmenu/>. Install **NETePay Mercury US EMV** at the main pos station only.



The client control in Step 1 is not required, as it is installed by default with Amigo Point of Sale. Click the download link under Step 2 to proceed.



Click I Agree to begin the download.



#### NETePay Download

- 3) Obtain the download link & serial number for **NETePay Mercury US EMV** from your Vantiv sales representative follow the steps in the introductory email to license NETePay.
- 4) Obtain the [Verifone VX805 for Mercury](#) <sup>3421</sup> from The Phoenix Group. Note that the VX805 must be programmed specifically for Mercury Pay EMV.

#### Back Office Settings

All settings for Mercury E2E must be entered at each pos station where credit card transactions are processed.

General Settings	
*Interface	Mercury PDCX/Datacap NETePay
*Integration Type	Mercury E2E
*Merchant ID	395347305=E2E
*NETePay IP Address	127.0.0.1 <span>Server Test</span>
*Bar Tab Method	PreAuth/Capture
*Batch Method	Time Initiated (Automatic)
*Card Reader	Verifone VX810 <span>Device Test</span>
*COM Port	9
*PIN Pad Type	VeriFone Vx810

**\*Interface**  
Select the credit card processing method at this station

The following settings are available for Mercury E2E:

- **Interface:** Select **Mercury PDCX/Datacap NETePay** as the interface.
- **Integration Type:** Select **Mercury E2E** as the integration type.
- **Merchant ID:** Enter the merchant number provided by the Vantiv sales representative.
- **NETePay IP Address:** Enter the IP address or Windows name of the PC where NETePay or (NETePay In-Store) is installed. Use 127.0.0.1 if NETePay is running on the same computer. Otherwise,
- **Bar Tab Method:** Select **PreAuth/Capture**. ZeroAuth bar tabs are no longer supported.
- **Batch Method:** In most cases the batch is settled automatically by Mercury at the same time each day at 4AM EDT and the batch method is set to **Time Initiated (Automatic)**. Set to **Merchant Initiated (Manual)** to display the batch button on the POS credit cards screen.
- **Card Reader:** As of this writing only the Verifone VX805 is supported. Select **Verifone VX810** from the drop-down list (the Verifone VX810 uses the same secure device id as the VX805).
- **COM Port:** In most cases the Verifone VX805 driver is installed with **COM Port 9** when using the batch file to install the driver.
- **PIN Pad Type:** As of this writing only the Verifone VX805 is supported. Select **Verifone VX810** from the drop-down list (the Verifone VX810 uses the same secure device id as the VX805).

## 10.5.6 EMV

### 10.5.6.1 Overview

Review the [EMV Fraud Liability Shift](#)<sup>[328]</sup> topic to determine if a Mercury EMV merchant account is suitable for your business.

#### Prerequisites

- Obtain a merchant account from Vantiv specifically for Mercury EMV
- Install and configure [Datacap NETePay for Mercury In-Store](#)<sup>[336]</sup>
- Install the [Verifone VX805](#)<sup>[342]</sup> USB driver and attach the VX805 to the pos station

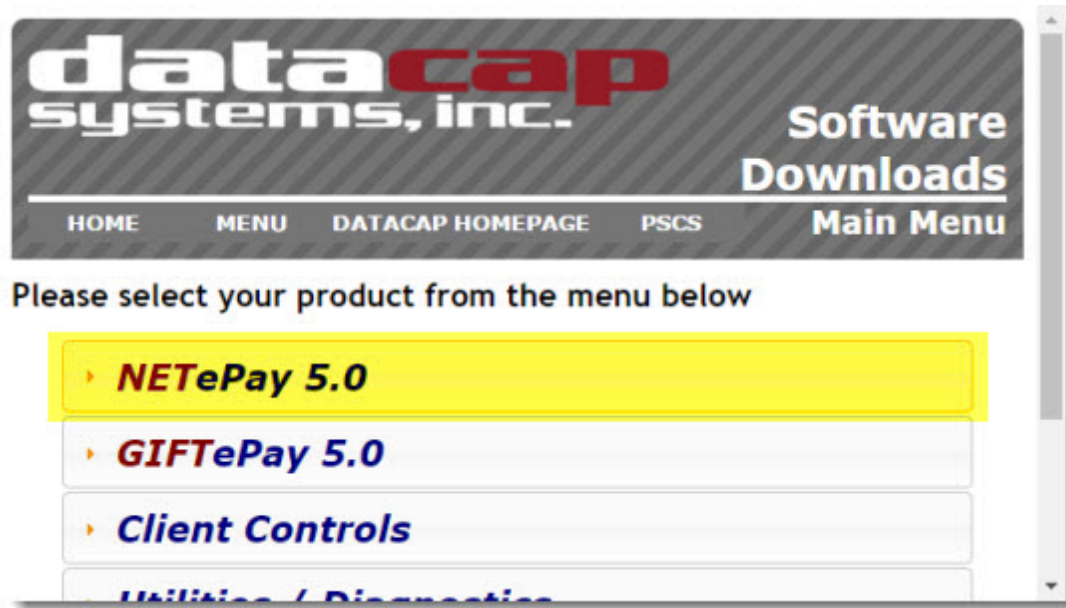
### 10.5.6.2 Settings

#### Initial Setup

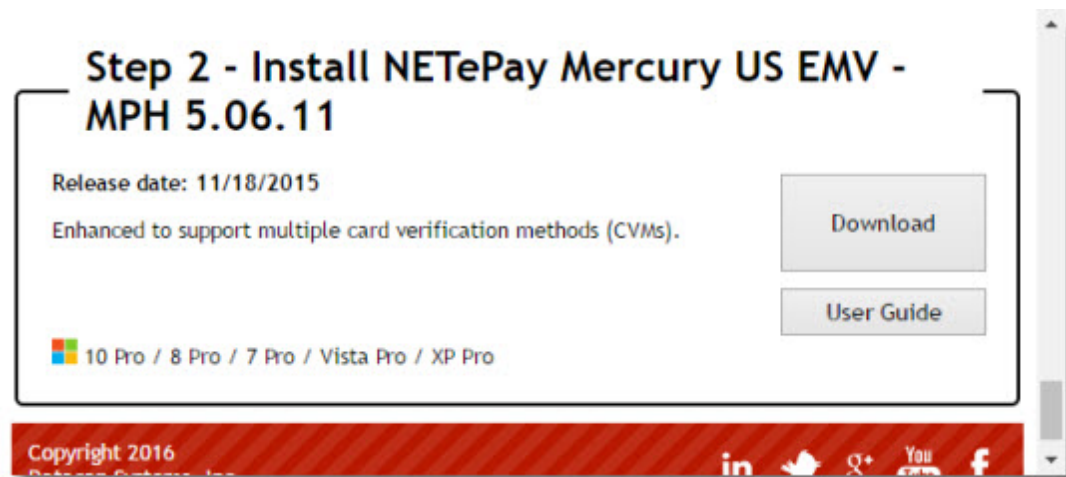
- 1) Contact your account representative at Mercury Payment Systems (<http://www.mercurypay.com>) to obtain your merchant number.



- 2) Download and install Datacap NETePay for Mercury "In-Store" from <http://www.datacapipay.com/downloadmenu/>. Install **NETePay Mercury US EMV** at the main pos station only.

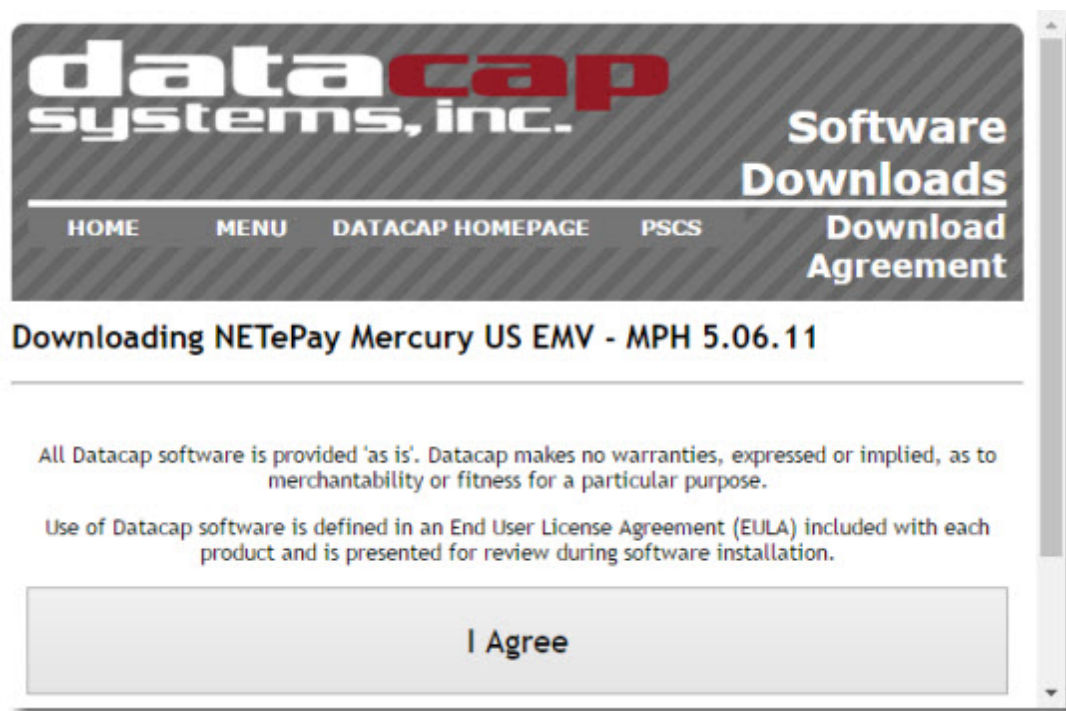


The client control in Step 1 is not required, as it is installed by default with Amigo Point of Sale. Click the download link under Step 2 to proceed.



Click I Agree to begin the download.





#### NETePay Download

- 3) Obtain the download link & serial number for **NETePay Mercury US EMV** from your Vantiv sales representative follow the steps in the introductory email to license NETePay.
- 4) Obtain the [Verifone VX805 for Mercury](#)<sup>342</sup> from The Phoenix Group. Note that the VX805 must be programmed specifically for Mercury Pay EMV.

#### Back Office Settings

Open AmigoPOS back office and navigate to Settings/Cards to open the credit card configuration dialog, as shown below. Select Mercury Payment Systems as the interface to reveal the parameters. Enter the merchant id and server urls. The server url is 127.0.0.1 when NETePay In-Store is installed at the local POS Station. All changes are saved immediately. Update the database to propagate the changes to the pos without restarting. Repeat this setup procedure on all pos stations used to process credit card transactions. Click [here](#)<sup>390</sup> to view a description of batch settlement options.

The screenshot shows a window titled "Credit Card Settings" with a close button. Inside, the Mercury logo is at the top. Below it is a "General Settings" section with a scrollable list of configuration options. The options are as follows:

General Settings	
*Interface	Mercury PDCX/Datacap NETePay
*Integration Type	Mercury EMV
*Merchant ID	395347305=EZE
*NETePay IP Address	127.0.0.1 <span>Server Test</span>
*Bar Tab Method	PreAuth/Capture
*Batch Method	Time Initiated (Automatic)
*Card Reader	Verifone VX810 <span>Device Test</span>
*COM Port	9
*PIN Pad Type	VeriFone Vx810

Below the settings list, there is a section for "\*Integration Type" with the instruction "Select the integration type."

### Mercury Pay Configuration

The following settings are available for Mercury EMV:

- **Interface:** Select **Mercury PDCX/Datacap NETePay** as the interface.
- **Integration Type:** Select **Mercury EMV** as the integration type.
- **Merchant ID:** Enter the merchant number provided by the Vantiv sales representative.
- **NETePay IP Address:** Enter the IP address or Windows name of the PC where NETePay is installed. Use 127.0.0.1 if NETePay is running on the same computer. Otherwise,
- **Bar Tab Method:** Select **PreAuth/Capture**. ZeroAuth bar tabs are no longer supported.
- **Batch Method:** In most cases the batch is settled automatically by Mercury at the same time each day at 4AM EDT and the batch method is set to **Time Initiated (Automatic)**. Set to **Merchant Initiated (Manual)** to display the batch button on the POS credit cards screen.
- **Card Reader:** As of this writing only the Verifone VX805 is supported. Select **Verifone VX810** from the drop-down list (the Verifone VX810 uses the same secure device id as the VX805).
- **COM Port:** In most cases the Verifone VX805 driver is installed with **COM Port 9** when using the batch file to install the driver.
- **PIN Pad Type:** As of this writing only the Verifone VX805 is supported. Select **Verifone VX810** from the drop-down list (the Verifone VX810 uses the same secure device id as the VX805).

### Sale/Add Tip Transaction Type

The sale is captured immediately after running the card, and adding a gratuity is optional. If a gratuity must be added, login to the POS and press the Credit Cards button on the right. Select the Sale transaction from the list or enter the transaction id as printed on the signature slip. The Mercury pay web interface refers to the ADD GRATUITY transaction as an ADJUST transaction.

Note: If a mistake was made when adding the gratuity, follow the same procedure to add a tip again. The original gratuity value is overwritten by the new gratuity value.

**Time-Out Value:** This value determines the time in seconds that AmigoPOS will wait for a response after sending a transaction request to Mercury. Although IP processing occurs in 3-10 seconds, up to 20 seconds should be allowed in the event of a slow internet connection or delays on the payment processor's end. Dial-on-demand router users should increase this value to 120 seconds or longer so that the router has sufficient time to establish an internet connection.

**Print Signature Slips:** AmigoPOS is capable of printing signature slips directly to your receipt printer. AmigoPOS will only print signature slips when a response indicating a successful transaction is received from Mercury

**Print Copies:** One signature slip is printed automatically for transactions (with the ability to reprint a signature slip by pressing the Reprint button). If additional slips are required, select the number of copies from the drop down list. i.e. selecting '1 Copy' will result in 2 signature slips being printed when the transaction is processed.

### Correcting Mistakes

If an incorrect gratuity amount is entered when adjusting a sale transaction, run another Add Tip transaction for the correct gratuity amount. The original gratuity amount will be replaced by the new amount.

### Signature Slips

AmigoPOS offers the option to customize the signature slip line-by-line. Navigate to Back Office/Settings/Main Settings/Credit Cards and expand the Signature Slips settings. The following settings are available:

- **Signature Line Minimum:** this value is used to determine the minimum order amount before a gratuity line and signature line is printed at the bottom of the signature slip. Set to zero to always print. Note that some payment processors require a signature regardless of the transaction amount.
- **Signature Slip Print Auth Number:** set to Yes to print the authorization number on the signature slip
- **Signature Slip Print Card Issuer:** set to Yes to print the card issuer (Visa, MasterCard, etc) on the signature slip
- **Signature Slip Print Card Member:** set to Yes to print the cardholder's name on the signature slip
- **Signature Slip Print Card Number:** set to Yes to print the last 4 digits of the card number on the signature slip
- **Signature Slip Print Date:** set to Yes to print the transaction date on the signature slip
- **Signature Slip Print Expiration Date:** set to Yes to print the transaction time on the signature slip
- **Signature Slip Print Reference Number:** set to Yes to print the reference number on the signature slip
- **Signature Slip Print Result:** set to Yes to print the transaction result (Captured, Processed, etc) on the signature slip
- **Signature Slip Print Sequence Number:** set to Yes to print the secondary TroutD number on the signature slip
- **Signature Slip Print Swipe Type:** set to Yes to print the swipe method (swiped or manual entry) on the signature slip
- **Signature Slip Print Table Name:** set to Yes to print the table name (from seating chart) on the signature slip
- **Signature Slip Print order Number:** set to Yes to print the order id on the signature slip

- **Signature Slip Print Time:** set to Yes to print the transaction time on the signature slip
- **Signature Slip Print Transaction:** set to Yes to print the transaction id on the signature slip
- **Signature Slip Print Transaction Type:** set to Yes to print the transaction type on the signature slip
- **Signature Slip Print TroutD:** set to Yes to print the TroutD on the signature slip
- **Signature Slip Print User Name:** set to Yes to print the server's name on the signature slip

### 10.5.7 Correcting Mistakes

If an error is made when processing a transaction or adding a gratuity to an existing transactions, several options are available to adjust or void the transaction. Other issues must be corrected by accessing the Mercury Pay web interface directly.

- [Incorrect gratuity amount added to a SALE / ADD GRATUITY transaction](#) <sup>389</sup>
- [Incorrect gratuity amount added to a PREAUTH / CAPTURE transaction in the current batch](#) <sup>389</sup>
- [A transaction has been Pre-Authorized but not captured. The user wants to void the transaction and start over](#) <sup>389</sup>
- [A SALE / ADD GRATUITY transaction must be voided](#) <sup>389</sup>
- [A PREAUTH / CAPTURE transaction must be voided](#) <sup>390</sup>

**Issue:** Incorrect gratuity amount added to a **SALE / ADD GRATUITY** transaction.

**Solution:** Enter the TransactionId (from the signature slip) on the **Add Gratuity** screen again and enter the new gratuity amount. The previous gratuity amount is replaced by the new gratuity amount. Run a Mercury Pay web interface credit card detail report to confirm that the amount is adjusted correctly.

**Issue:** Incorrect gratuity amount added to a **PREAUTH / CAPTURE** transaction in the **Current Batch**.

**Solution:** Enter the TransactionId (from the signature slip) on the **Capture** screen again and enter the new gratuity amount. The previous gratuity amount is replaced by the new gratuity amount. Run a Mercury Pay web interface credit card detail report to confirm that the amount is adjusted correctly.

**Issue:** A transaction has been Pre-Authorized but not captured. The user wants to void the transaction and start over.

**Solution:** A pre-authorization cannot be voided. The temporary hold placed on the customer's card is removed within a few days.

**Issue:** A **SALE / ADD GRATUITY** transaction must be permanently voided

**Solution:** Locate the **AddGratuity** transaction (or the SALE transaction if a gratuity has not been added) in Back Office > Summary > Credit Cards and right-click on the transaction. Select **Void Selected Transaction** and confirm that the amount and transaction id are correct. Click **Process** and wait for the response from the Mercury Pay server. Note that this procedure is permanent and the original transaction cannot be adjusted again. **Ensure that you have access to the customer's card if a new transaction is required.**

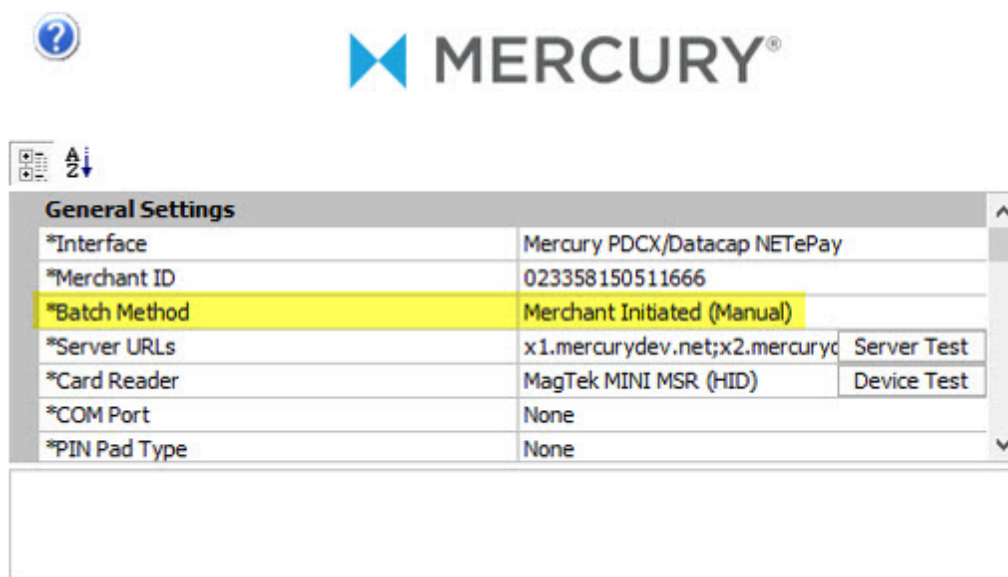
**Issue:** A **PREAUTH / CAPTURE** transaction must be permanently voided

**Solution:** Locate the **Capture** transaction in Back Office > Summary > Credit Cards and right-click on the transaction. Select **Void Selected Transaction** and confirm that the amount and transaction id are correct. Click **Process** and wait for the response from the Mercury Pay server. Note that this procedure is permanent and the original transaction cannot be adjusted again. **Ensure that you have access to the customer's card if a new transaction is required.**

### 10.5.8 Batch Settlement

Mercury Payments can settle the batch automatically each day at 4AM EDT or the merchant can choose to settle the batch manually. Both options are not available; the batch settlement method option be set by Mercury Payment Systems. Manual settlement may be preferable for end users in the Pacific time zone (or any business open past 4AM EDT).

The default back office setting for Mercury Payment Systems batch method is **Time Initiated (Automatic)**. If manual batch settlement is required, contact Mercury Payment Systems to change the batch settlement method, then return to the settings screen and select **Merchant Initiated (Manual)** from the drop-down list. Restart back office.



General Settings	
*Interface	Mercury PDCX/Datacap NETePay
*Merchant ID	023358150511666
*Batch Method	Merchant Initiated (Manual)
*Server URLs	x1.mercurydev.net;x2.mercurydev.net <span>Server Test</span>
*Card Reader	MagTek MINI MSR (HID) <span>Device Test</span>
*COM Port	None
*PIN Pad Type	None

**Mercury Payment Back Office Settings**

The current batch can be viewed or settled by selecting the **Settle Batch** menu item on the credit cards screen. Select **SCHEDULE BATCH SETTLEMENT** to view the batch summary. The batch summary displays transactions that have been processed since the batch was last settled.

+

ADD TIP

×

VOID

↶

REVERSAL

↶×

REFUND

≡

SCHEDULE BATCH SETTLEMENT

SIGNATURE SLIP

↔

TRANSACTION LOG

HELP

↶

FINISHED

SCHEDULE BATCH SETTLEMENT

CONFIRM THE TRANSACTION DETAILS TO PROCEED

?

BATCH SETTLEMENT

MERCHANT ID	337234004
BATCH NUMBER	0016
BATCH ITEM COUNT	0
NET BATCH TOTAL	0.00
CREDIT PURCHASE COUNT	0
CREDIT PURCHASE AMOUNT	0.00
CREDIT RETURN COUNT	0
CREDIT RETURN AMOUNT	0.00
DEBIT PURCHASE COUNT	0
DEBIT PURCHASE AMOUNT	0.00
DEBIT RETURN COUNT	0
DEBIT RETURN AMOUNT	0.00

←

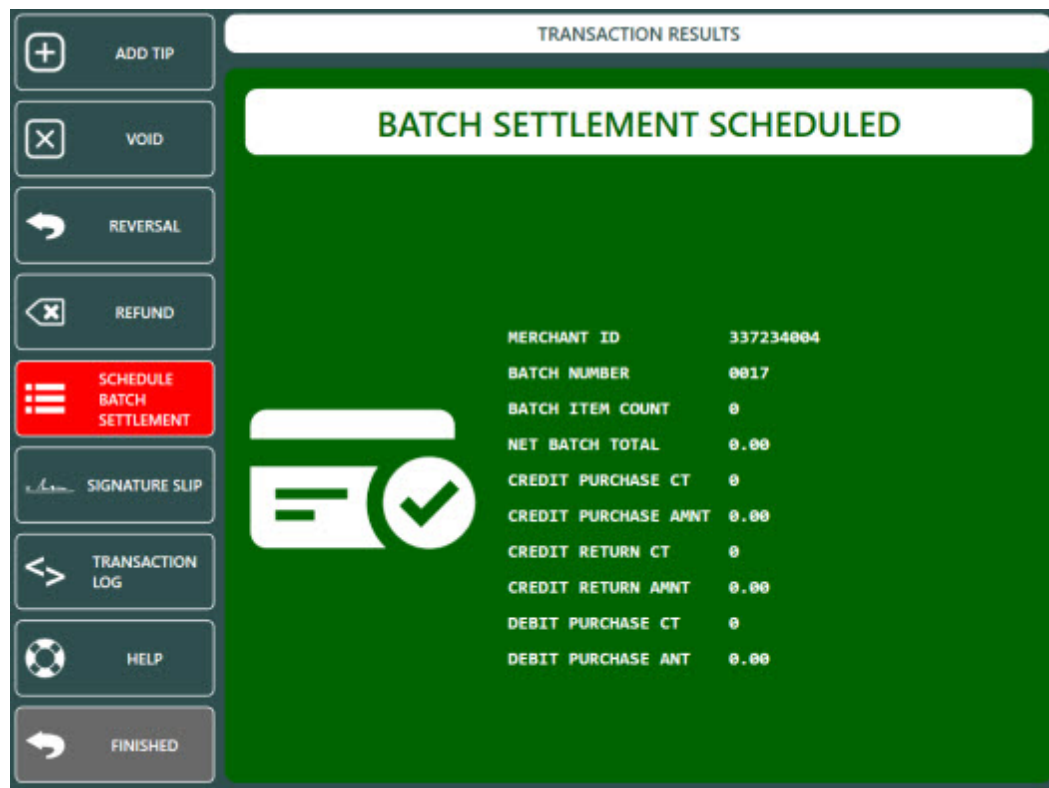
CANCEL

⚡

SCHEDULE BATCH SETTLEMENT

Batch Summary

Press **SCHEDULE BATCH SETTLEMENT** to settle the batch. Allow a few seconds for the batch to settle and review the status message to verify that the batch was closed with no errors.

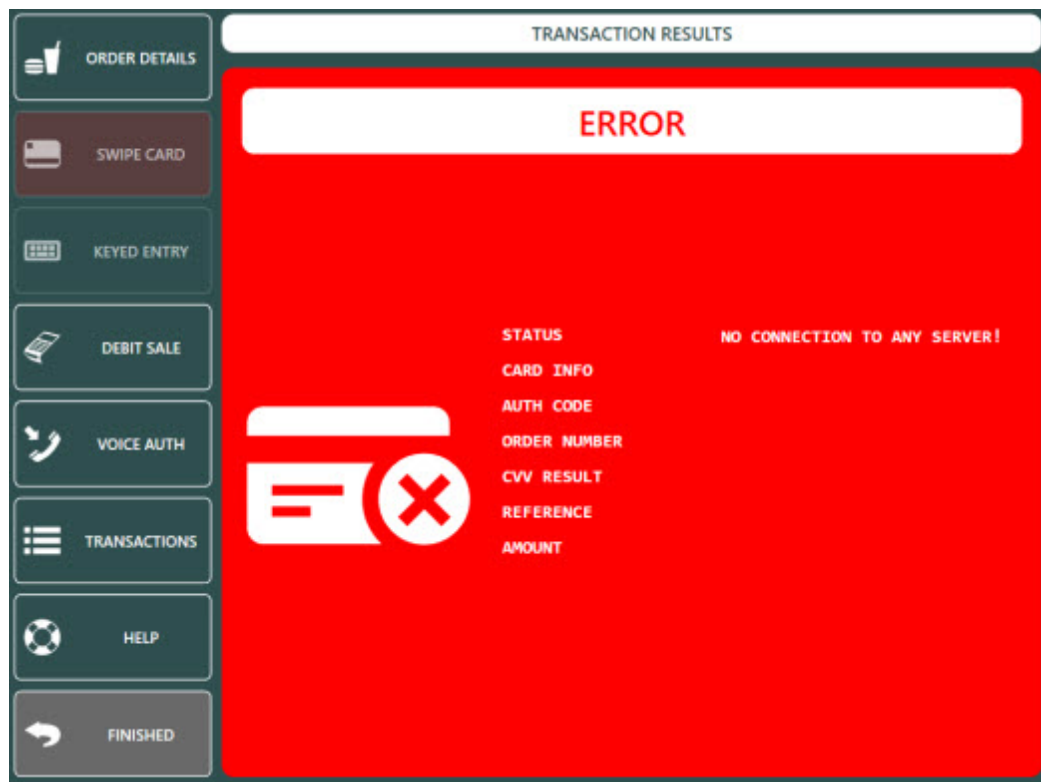


Batch Settlement Confirmation

### 10.5.9 Troubleshooting

The following is a list of common errors that may occur when using the Mercury Payments credit and gift card processing interface.

- **No Connection To Any Server:** [Datacap NETePay for Mercury In-Store](#) <sup>336</sup> is not running at the main pos station or an incorrect IP address is entered in the back office settings.



### 10.5.10 Partial Approvals

AmigoPOS supports partial approval transactions as per recent payment processor regulations. When a Debit or Prepaid authorization is initiated, the issuer can respond with an approval amount less than the requested amount. Merchants can conduct split-tender purchases by allowing debit and prepaid card issuers to approve a portion of the original transaction amount in the authorization request when the transaction amount exceeds the funds available on the card. The merchant can then initiate split-tender processing and obtain the remainder of the purchase amount in another form of payment.

A partial approval transaction is identical to a credit card approval and the cashier is given the option to reverse the partial approval so that the funds are immediately returned to the customer's card. The following images illustrate a typical partial approval transaction and corresponding reversal.

A transaction for \$23.62 is attempted and the payment processor has returned a partial approval for \$20.00, resulting in a balance due of \$3.62.



**TRANSACTION RESULTS**

**APPROVED**

PRINT RECEIPT SIGNATURE SLIP ADD TIP

STATUS	PARTIAL AP
CARD INFO	M/C *****0434
AUTH CODE	EMVSALE 000000
ORDER NUMBER	4
CVV RESULT	
REFERENCE	1025
AMOUNT	\$20.00

**CANCEL SALE (REVERSAL)**

**BALANCE DUE: \$3.62**

The cashier can press the gray CANCEL SALE button to reverse the partial approval so that the funds are immediately returned to the customer's account.

**CREDIT CARD REVERSAL**

CONFIRM THE TRANSACTION DETAILS TO PROCEED

**REVERSAL**

TRANSACTION ID	1
DATE	12/12/2016 6:15:43 AM
CARD ISSUER	M/C
CARD HOLDER	Test Card 10
ACCT NUMBER	XXXXXXXXXXXX0434
BAL TAB ID	0
CASHIER	DEMO U
ORDER ID	4
TRANSACTION TYPE	SALE
SWIPED	YES
AUTHORIZED AMOUNT	\$20.00
BALANCE DUE	\$3.62
GRATUITY	\$0.00

**CANCEL PROCESS REVERSAL**

The issuer returns an approval indicating that the transaction has been successfully voided.

The screenshot displays the 'TRANSACTION RESULTS' screen. On the left is a vertical sidebar with buttons: ADD TIP (+), VOID (X), REVERSAL (red with arrow), REFUND (X with arrow), BATCH SETTLEMENT (list icon), SIGNATURE SLIP (signature icon), TRANSACTION LOG (arrow icon), HELP (globe icon), and FINISHED (arrow icon). The main area has a top bar labeled 'TRANSACTION RESULTS' and a large 'APPROVED' status bar. Below this are buttons for PRINT RECEIPT, SIGNATURE SLIP (with a signature icon), and ADD TIP (+). A central graphic shows a card with a checkmark. To the right, a table displays transaction details:

STATUS	APPROVED
CARD INFO	M/C XXXXX 434
AUTH CODE	VOIDSALE 000000
ORDER NUMBER	4
CVV RESULT	
REFERENCE	1025
AMOUNT	\$20.00

## 10.6 Datacap NETePay

### 10.6.1 Overview

AmigoPOS can process credit card transactions through Datacap NETePay. NETePay setup is easy and a wide selection of compatible credit card terminals and magnetic card readers are available.

Datacap NETePay can be obtained from the merchant account provider or other vendor. NETePay and GIFTePay are also available directly from amigopos.com. The merchant account provider will install and configure NETePay on the main pos station only. Other pos stations will send transactions to the main pos station for processing. A PDF file containing a list of certified payment processors is available at <http://www.datacapsystems.com/pc-based-point-of-sale>.

	ADS	MPS	Nova Host	Nova Term	Concord EFS	Fifth Third	VITAL TSYS	VITAL TSYS	CardNet FDMS	Steering	RBS Lynk	Heart land
<b>CREDIT Transactions</b>	Host	Host	Host	Term	Host	Host	Term	Host	Term	Host	Term	Term
Sale	X	X	X	X	X	X	X	X	X	X	X	X
Return	X	X	X	X	X	X	X	X	X	X	X	X
Void Sale	X	X	X	X	X	X	X	X	X	X	X	X
Void Sale by Record				X		X	X		X		X	X
Void Return	X	X	X	X	X	X	X	X	X	X	X	X
Void Return by Record				X		X	X		X		X	X
AuthOnly	X	X	X	X	X	X	X	X	X	X	X	X
PreAuth		X		X	X	X	X		X	X	X	X
VoiceAuth	X	X	X	X	X	X	X	X	X	X	X	X
PreAuth Capture		X		X	X	X	X		X	X	X	X
Adjust		X		X		X	X	X	X		X	X
Adjust by Record				X		X	X		X		X	X
Balance		X	X						X			
Zero Auth (Verify Card)									X		X	

	GPS Term US	GPS Host US	Paymentech Host	Paymentech Term	FDMS Nashville
<b>CREDIT Transactions</b>					
Sale	X	X	X	X	X
Return	X	X	X	X	X
Void Sale	X	X	X	X	X
Void Sale by Record	X			X	X
Void Return	X	X	X	X	X
Void Return by Record	X			X	X
AuthOnly	X	X	X	X	X
PreAuth	X	X	X	X	X
VoiceAuth	X	X	X	X	X
PreAuth Capture	X	X	X	X	X
Adjust	X	X		X	X
Adjust by Record	X			X	X
Balance			X		X
Zero Auth (Verify Card)			X		X

#### Comptaible Payment Processors

Note that the payment processor must support the **AdjustByRecord** transaction type so that a tip can be added when necessary. Refer to the list below for processors that support AdjustByRecord as of this writing. If your processor is not on the list, contact your merchant account provider to verify that an approved processor is available for your merchant account. Note from the chart that payment processors for most host-based merchant accounts do not offer AdjustByRecord so the account must be of the Terminal type.

Important: Note that in the chart above some host-based processors DO NOT support AdjustByRecord or VoidByRecord and their lightweight version of NETePay In-Store should not be used with AmigoPOS. The merchant account provider or payment processor should supply you with the full version of Datacap NETePay where the database is installed locally (terminal-based).

The following terminal-based processors are supported (note that most require a full installation of NETePay):

- Nova (Terminal-Based)
- Fifth Third
- Vital (Terminal-Based)
- CardNet FDMS (Terminal-Based)
- RBS Lynk (Terminal-Based)
- Heartland (Terminal-Based)
- GPS (Global Payments) US (Terminal-Based)
- Paymentech (Terminal-Based)

- FDMS Nashville

\*If your business does not accept tips, any of the processors supported by NETePay are compatible, regardless of the AdjustByRecord transaction availability, since all transactions are captured immediately and adjustments are not necessary.

#### **SALE/ADD TIP**

All credit card transactions are processed using the SALE/ADD TIP method, so that the transaction is captured and added to the current batch immediately, even if no tip is added. The Preauth/Capture transaction method is not available when using AmigoPOS with NETePay


When using SALE/ADD TIP Transactions, the sale is captured immediately after running the card, and adding a gratuity is optional. If a gratuity must be added, return to the order settlement screen and select the Credit Card payment type again. Touch the 'ADD TIP' button to add a gratuity to the sale. This transaction type is generally used in a retail environment or in restaurants where gratuities are not used (i.e. fast food).

If a mistake was made when adding the gratuity, add the tip again. The original tip amount is replaced by the new tip amount.


### **10.6.2 Compatible Devices**

The following list of devices is compatible with both Mercury Pay (PDCX) and Datacap NETePay, current as of April 29, 2015. Please refer to the EMV topic for Mercury EMV compatible devices.

Magnetic Stripe Readers	Device	Secure Device ID	Encryption Key	Distributor
	<a href="#">MagTek Dynamag</a>	MTMINIMSRHID Or MTMINIMSRVCOM Or MTMINIMSR	No encryption	JR's POS Depot
	<a href="#">MagTek SureSwipe</a>	MTSURESWIPEVCOM	No encryption	JR's POS Depot
	<a href="#">ID Tech SecureMag</a>	IDTSECUREMAGHID Or IDTMSRHID	IDT-KEYINJ-063-A	JR's POS Depot ID Tech
	<a href="#">ID Tech SecuRed</a>	IDTSECUREDMSRHID	IDT-KEYINJ-063-A	JR's POS Depot ID Tech
	<a href="#">POS-X XM95U</a>	IDTPOSIXMSRHID	No encryption	ScanSource MS Cash Drawer
	<a href="#">VivoPay 4500M</a>	VIVO4500M		JR's POS Depot ID Tech




PIN Pads	Device	Secure Device ID	Distributor
	<a href="#">Verifone VX805</a> <a href="#">VX810</a> <a href="#">VX820</a>	VX805XPI Or VX810XPI Or VX810XPI	JR's POS Depot Phoenix Group

	<a href="#"><u>Verifone MX850</u></a>	VERIFONEMX850	JR's POS Depot Phoenix Group
	<a href="#"><u>Verifone MX915</u></a>	VERIFONEMX915	JR's POS Depot Phoenix Group
	<a href="#"><u>Ingenico ISC 250</u></a>	INGENICOISC250 Or INGENICOISC250_MERCURY_E2E	JR's POS Depot
	<a href="#"><u>Ingenico iPP 350</u></a>	INGENICOIPP350	JR's POS Depot
	<a href="#"><u>UIC PP795 &amp; PP795SE</u></a>	UIC795 Or UIC795SE	JR's POS Depot POS Portal
	<a href="#"><u>Equinox L5300</u></a>	EQUINOXL5300	JR's POS Depot POS Portal
	<a href="#"><u>MagTek iPAD</u></a>	MTIPADHID	JR's POS Depot

<b>All-in-One's</b>	Device	Secure Device ID	Encryption Key	Distributor
	<a href="#"><u>Posiflex "KS" Series</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	Posiflex



	<a href="#"><u>J2 Retail J2 650</u></a>	J2650MSRVCOM		J2 Retail
	<a href="#"><u>FEC Gladius Smart AL7385</u></a>	FECMSRHID		FEC
	<a href="#"><u>FEC AerPOS</u></a>	FECAERMSRHID		FEC
	<a href="#"><u>POSBANK USA AnyShop II</u></a>	ANYSHOPPOSMSRHID		POSBANK
	<a href="#"><u>AdvanPOS EP-5500-XX10/AR30</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	AdvanPOS
	<a href="#"><u>Touch Dynamic Breeze</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	Touch Dynamic
	<a href="#"><u>IBM SurePOS 500</u></a>	IBMSUREPOSMSR		Toshiba
	<a href="#"><u>Micros PCWS 2015</u></a>	MICROSPCWSMSR		Oracle

	<a href="#"><u>Pioneer POS-Stealth Touch Series</u></a>	PIONEERSTM5MSRHID		ScanSource
	<a href="#"><u>ViVOpay Vend III</u></a>	VIVOVEND3	IDT-KEYINJ-063-A	JR's POS Depot  ID Tech
	<a href="#"><u>Partner Tech SP800</u></a>	IDTSECUREMAGHID	IDT-KEYINJ-063-A	Partner Tech

### 10.6.3 Integrated Card Readers

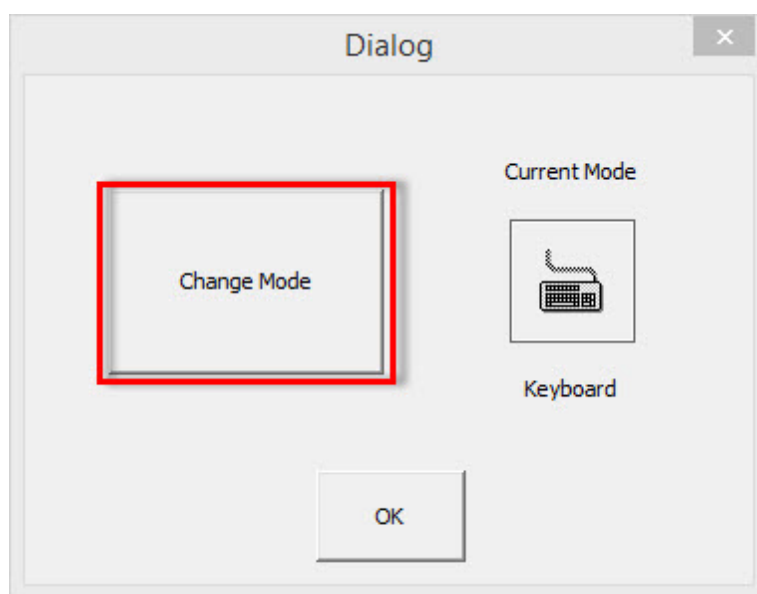
Many touchscreen monitors include an integrated magnetic card reader. In most cases, the reader is set to use keyboard wedge mode so that the reader is detected as a keyboard. Mercury Pay and Datacap NETePay require the magnetic card reader to use HID mode. Most manufacturer's provide a utility to convert the reader from keyboard wedge to HID mode, if the reader supports this function.

- [Magtek](#) 
- [IDTech/Pos-X](#) 

#### Magtek

Magtek card readers are included with many popular touchscreens such as those manufactured by Elo Touch. The card reader can be converted from keyboard wedge to HID by downloading the **Magtek MSR Change Mode** utility from <http://www.amigopos.com/Support/DriverDownload>. The utility does not require installation.

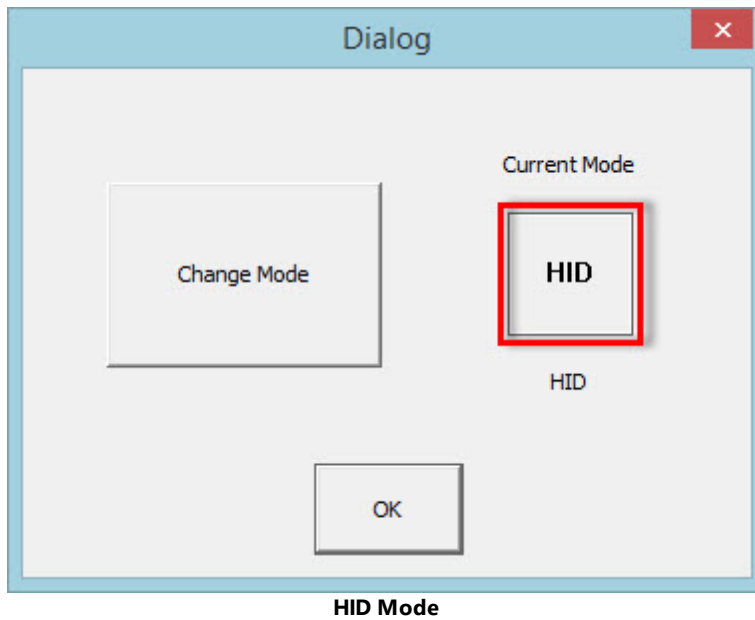
1. Unzip the file to the desktop.
2. Right-click on the file and select **Run as administrator**.
3. Click **Change Mode**



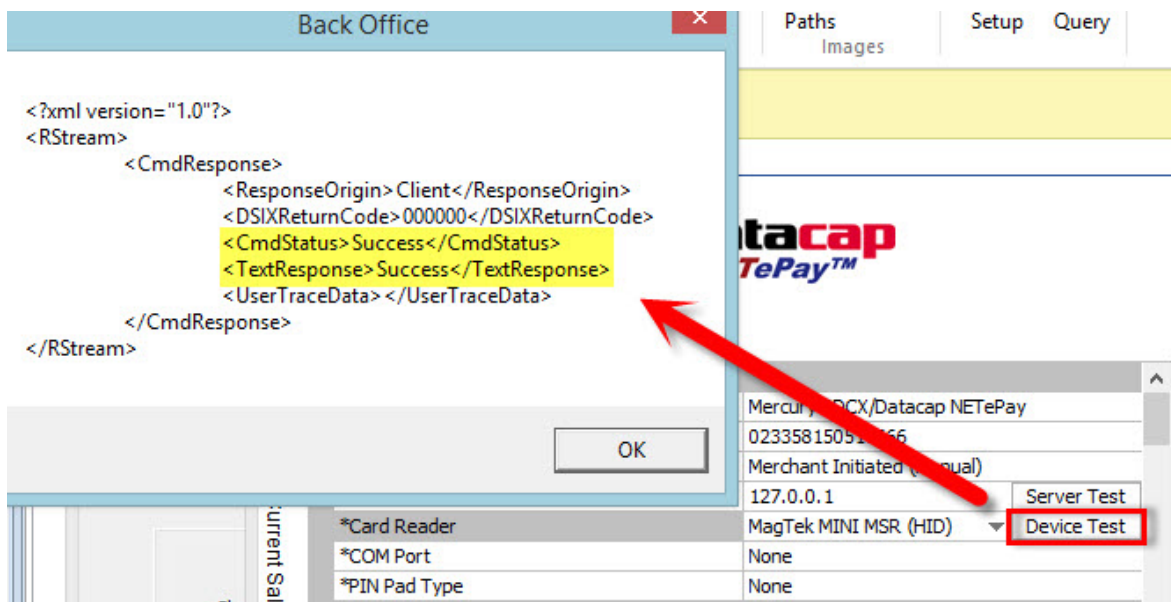
Keyboard Wedge Mode



- Close and reopen the utility to verify that the current mode is set to **HID**.



- Verify that the device is compatible by clicking **Device Test** in **Back Office>Settings>Credit Cards**.

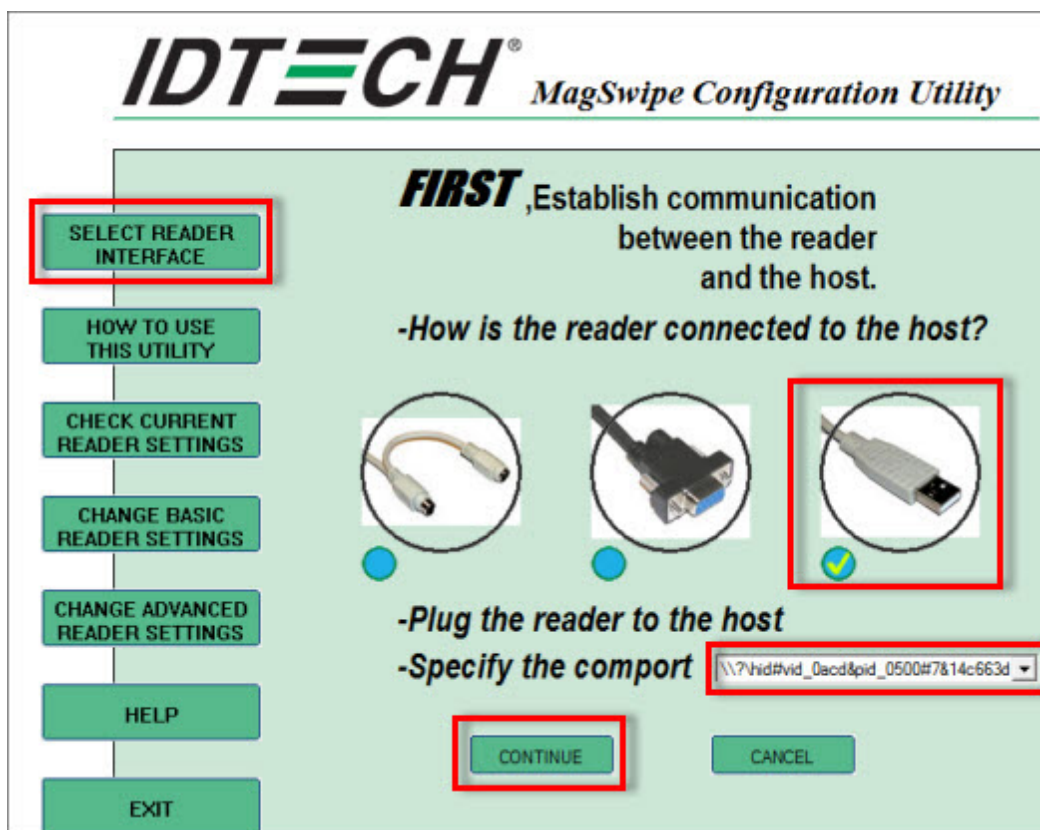


#### IDTech/Pos-X

IDTech and Pos-X card readers are included with many popular touchscreens such as those manufactured by Pos-X. The card reader can be converted from keyboard wedge to HID by downloading the **Magswipe Configuration Utility** from <http://www.amigopos.com/Support/DriverDownload>.

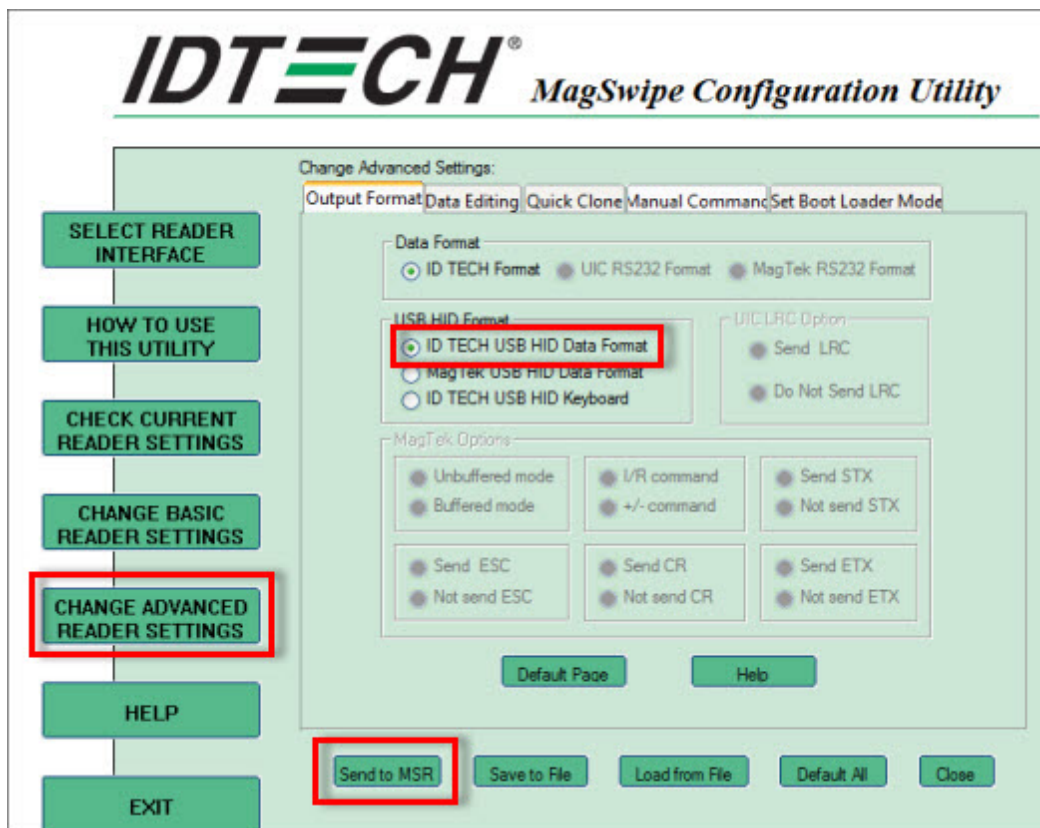
- Install the utility. Rebooting is not required.

2. Click **SELECT READER INTERFACE** and select **USB**. The comport field should be set automatically. Click **CONTINUE**.



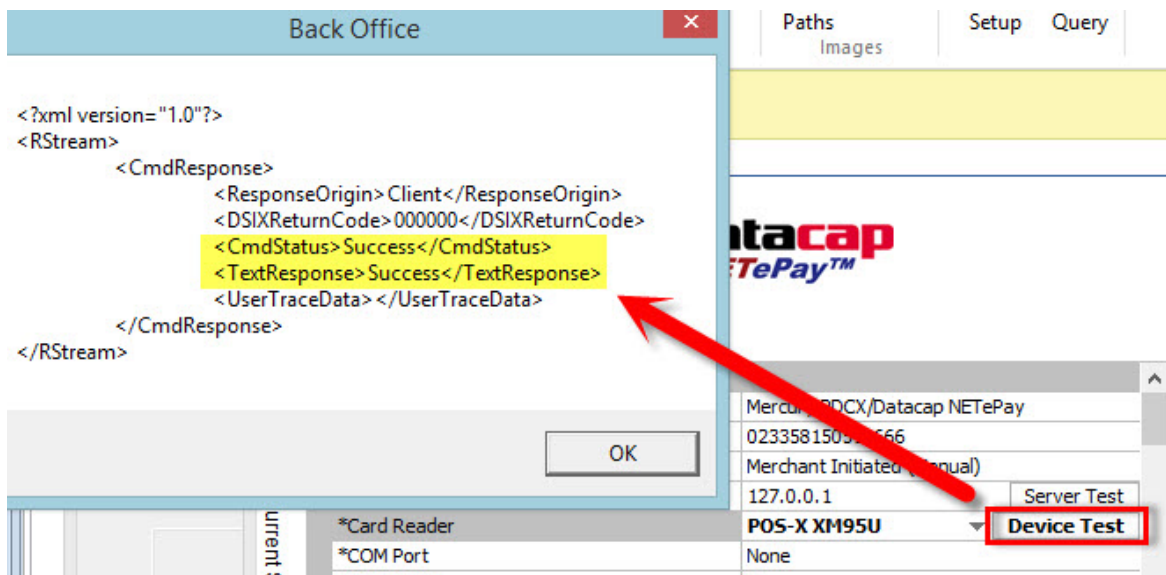
Magswipe Configuration Utility Reader Interface

3. Click **CHANGE ADVANCED READER SETTINGS** and change the USB HID Format to **IDTech USB HID Format** and click **Send to MSR**. Windows will automatically detect the new reader interface and automatically install the required drivers. Click **EXIT** and uninstall the utility.



Magswipe Configuration Utility Advanced Settings

4. Verify that the device is compatible by clicking **Device Test** in **Back Office>Settings>Credit Cards**.



## 10.6.4 Setup

Complete the following steps only after your merchant account provider or authorized Datacap NETePay reseller has installed and tested Datacap NETePay on one pos station. Install Datacap NETePay on the main pos station, usually the same pos station that runs the database server.

Note that Datacap NETePay must be obtained from an authorized vendor or merchant account provider. AmigoPOS does not sell or install Datacap NETePay.

### Back Office/Settings/Credit Cards

#### Settings

Open **Back Office>Settings>Credit Cards** to display the setup screen. All settings on this screen are local and must be set at each pos station and back office workstation that is used to process credit card transactions.

- **Interface:** Select Mercury PDCX/Datacap NETePay from the drop-down list.
- **NETePay Merchant ID:** Enter the merchant id as shown on the NETePay setup screen
- **NETePay Batch Method:** Currently, only automatic batch settlement is supported, where the payment processor settles the batch automatically. If your merchant account requires manual batch settlement, use the EPAY Administrator application to settle the batch.
- **NETePay Server IP:** Enter the IP address of the workstation running NETePay. If NETePay is running on the same pos station, use the IP address 127.0.0.1. Otherwise, use the IP address of the pos station running NETePay, which can be found by typing **IPCONFIG** at a Windows command prompt on the pos station running NETePay, as shown below. This address can also be determined by viewing the client list in your network router's web interface.

```
C:\>IPCONFIG

Windows IP Configuration

Ethernet adapter Local Area Co...:

    Connection-specific DN...:
    IP Address . . . . .: 192.168.1.108
    Subnet Mask . . . . .: 255.255.255.0
    Default Gateway . . . . .: 192.168.1.1
```

Type IPCONFIG at a command prompt to determine the IP address of the PC hosting PCCharge Payment Server

- **NETePay Server Port:** Enter the IP port of the workstation running NETePay. The default port for NETePay is 9000.
- **NETePay Card Reader:** Select the device used to swipe credit cards at this pos station. A list of compatible devices is available [here](#)<sup>[347]</sup>. The following devices are supported in the current release:
- **NETePay COM Port:** Select the virtual COM port assigned to this device. This setting is only used for devices that are assigned a virtual COM port by the device driver, such as the Datacap PDC.

- **NETePay PIN Pad Type:** Select the type of PIN Pad attached to the card reader.

Refer to the Mercury Pay back office [setup topic](#)<sup>[384]</sup> for a description of additional fields.

## 10.6.5 Usage

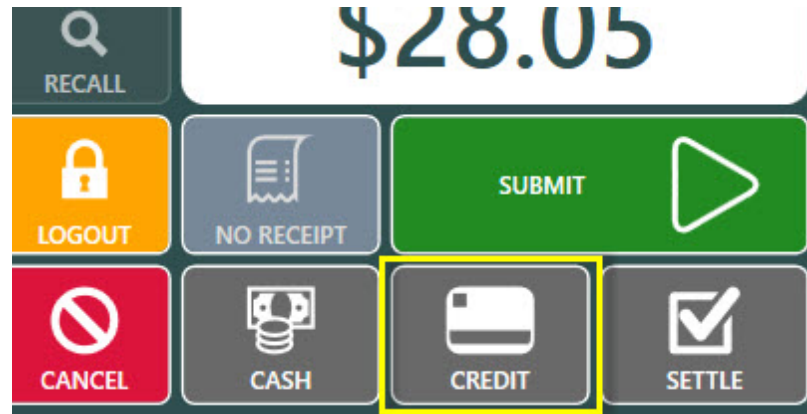
The transaction types listed below are available when using the PDCX integration method with either the Mercury Pay or Datacap NETePay integrated credit card processing interface.

- [SALE](#)<sup>[359]</sup>
- [DEBIT](#)<sup>[359]</sup>
- [VOICE AUTH](#)<sup>[359]</sup>
- [ADD TIP](#)<sup>[363]</sup>
- [VOID](#)<sup>[367]</sup>
- [REFUND](#)<sup>[369]</sup>
- [REVERSAL](#)<sup>[372]</sup>
- [ZERO AUTH](#)<sup>[375]</sup> (for Bar Tabs)

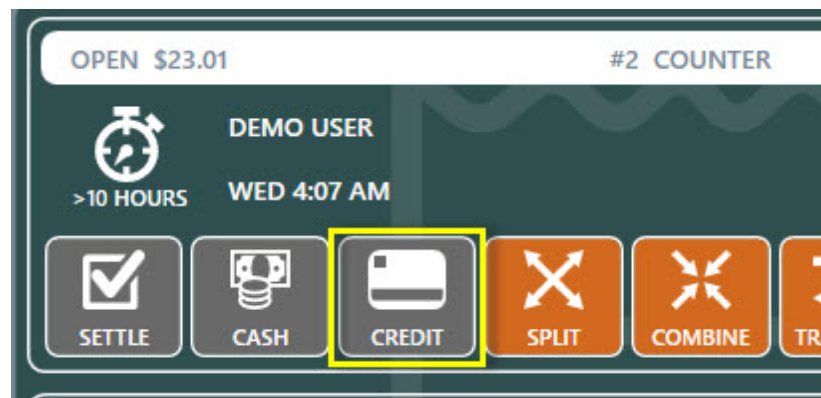
### SALE

The SALE transaction type is used to process a payment on a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type). An approved sale transaction is added to the batch and will be settled at the next scheduled batch settlement and can be adjusted to add a tip before the batch is settled.

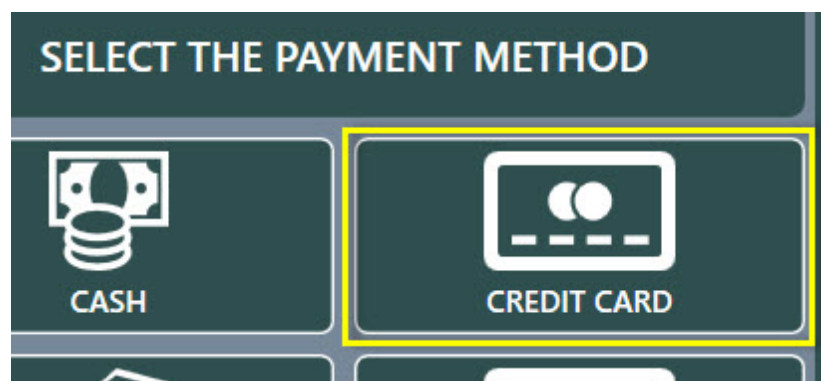
The SALE transaction can be initiated directly from the order entry screen, the order recall list or the settle screen.



Order Entry Screen



Order Recall List

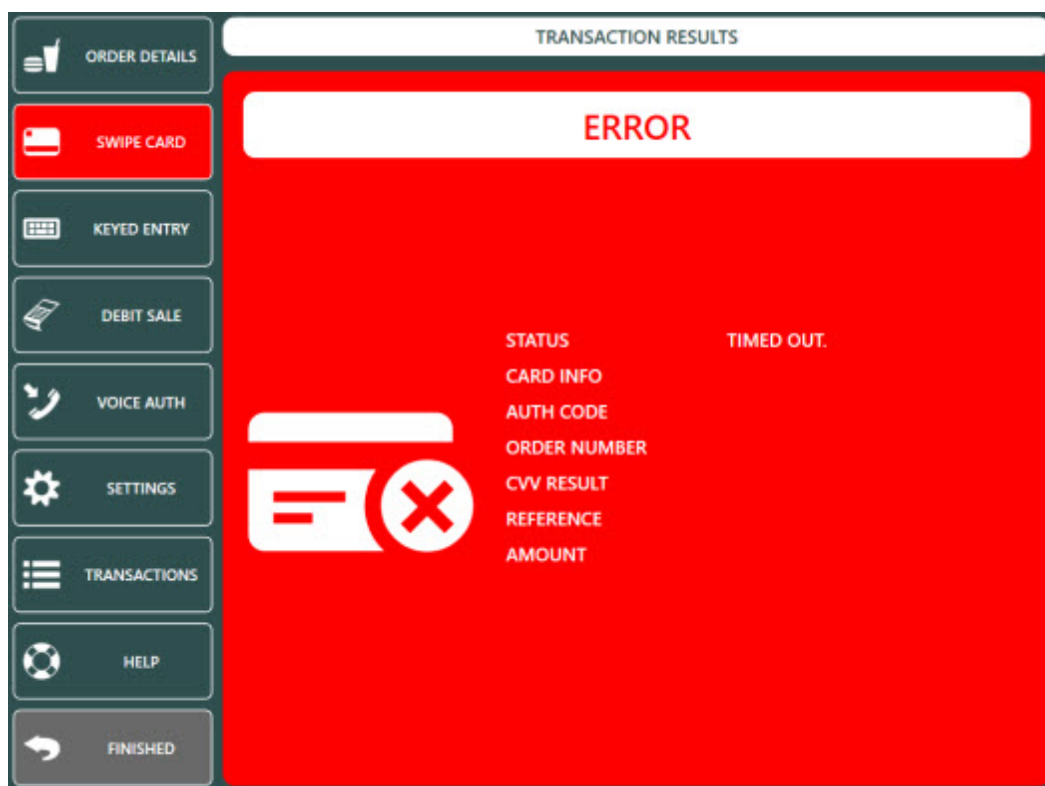


Settle Screen

Press the CREDIT button to automatically initialize the card reader and display the card swipe prompt.

**Card Swipe Prompt**

The transaction is canceled if the card is not swiped within 20 seconds.

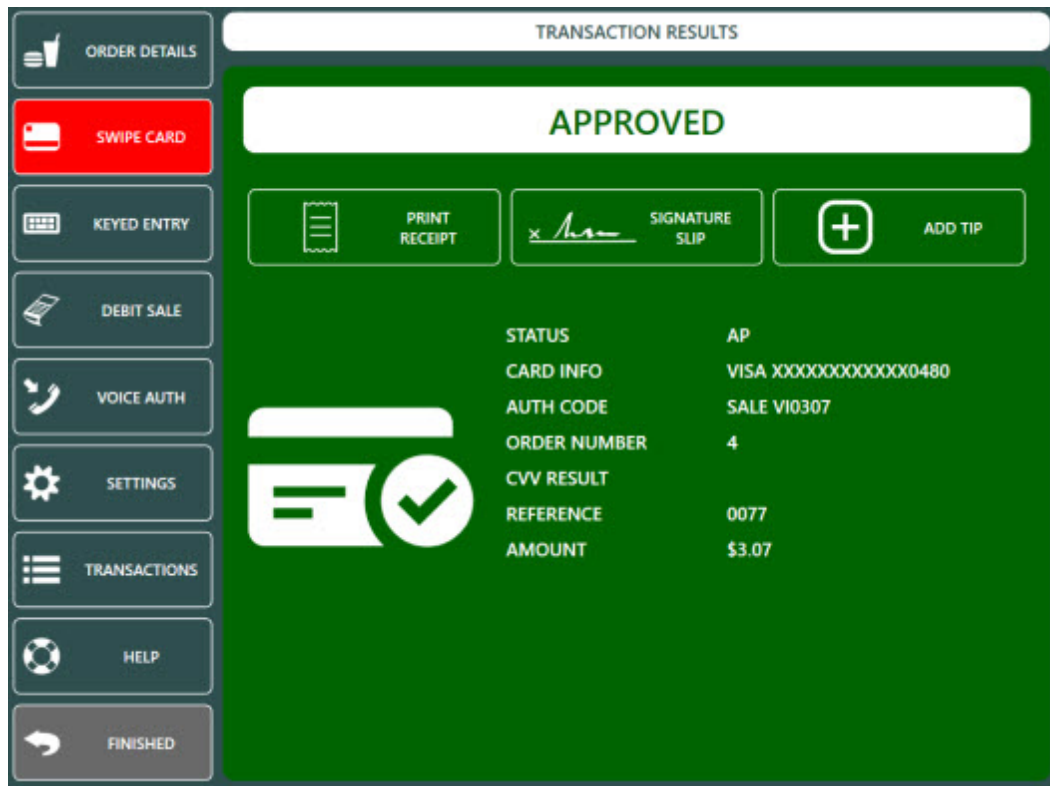
**Timeout Error**

The transaction is sent to the server. The "Processing...Please Wait" prompt is displayed until a response is received from the payment processor, generally in 3-5 seconds.



A green background indicates a successful transaction.





**Successful SALE Transaction**

A red background indicates a declined transaction or transaction error. The CALL CENTER message displayed below indicates that the cashier must call the payment processor to provide additional information before the transaction can be approved.



#### Unsuccessful SALE Transaction

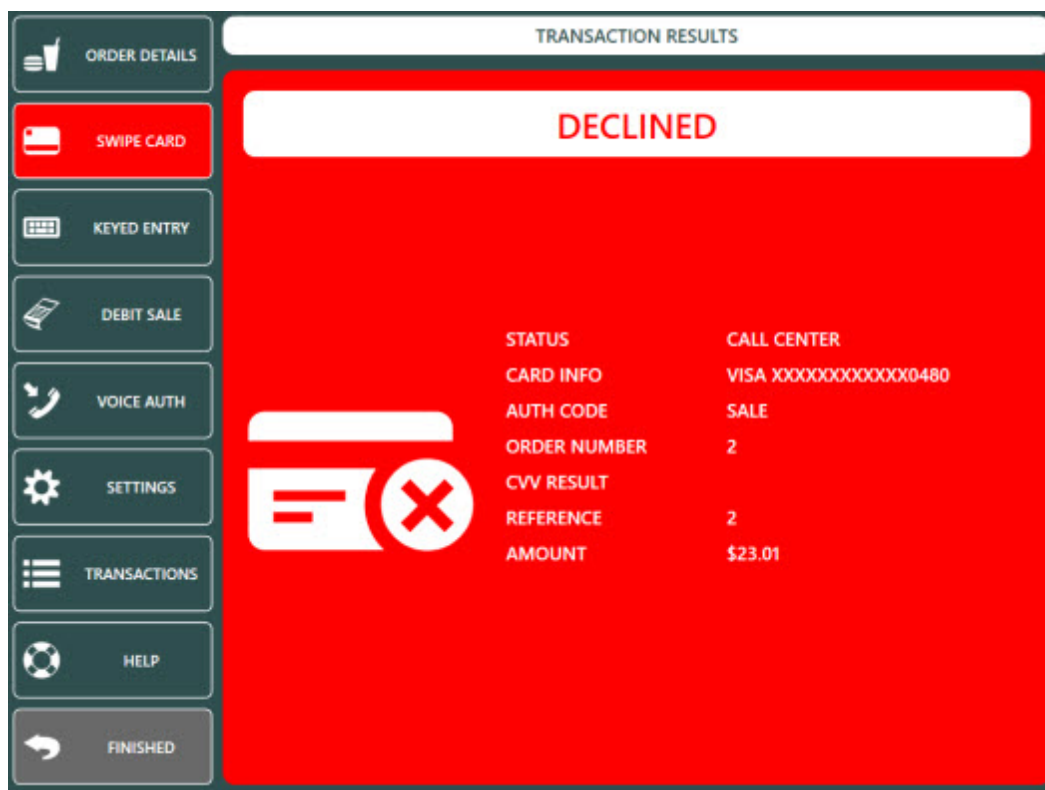
#### DEBIT

Debit card transactions require a compatible pinpad. Note that the ADD TIP transaction is not available for debit card transactions. An approved debit card transaction is added to the batch and will be settled at the next scheduled batch settlement.

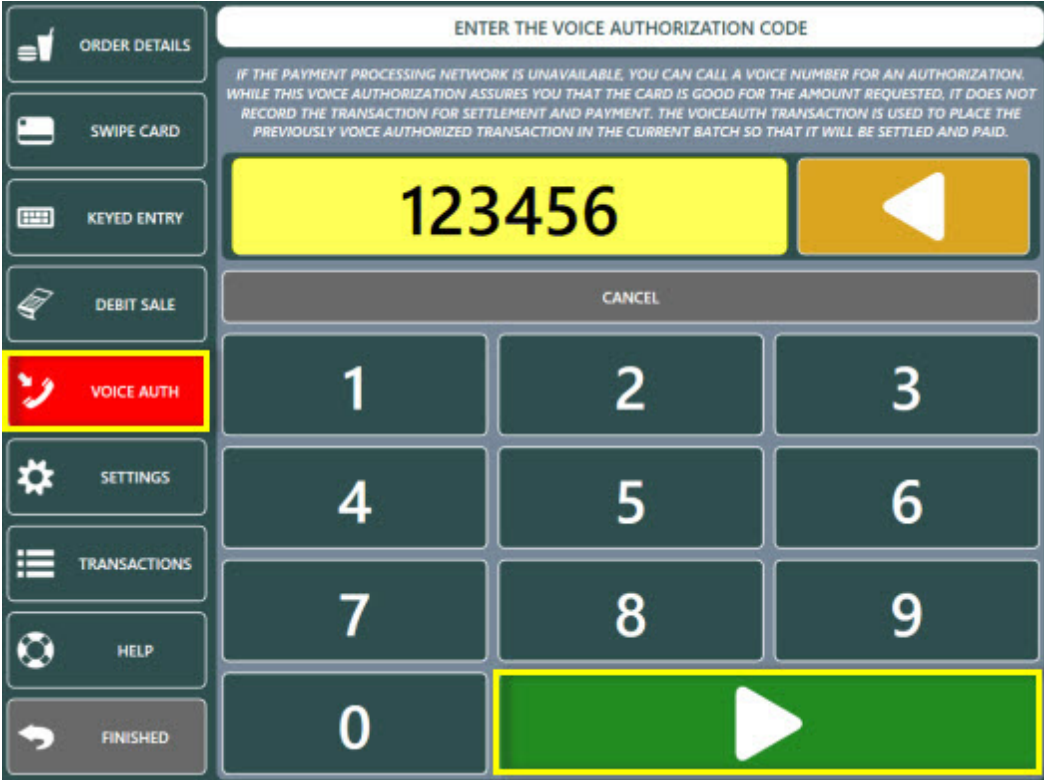
#### VOICE AUTH

The VOICE AUTH transaction type is used to process a transaction for which a voice authorization code was previously obtained. If the payment processing network is unavailable, the merchant can call a voice number for an authorization. While this voice authorization assures the merchant that the card is good for the amount requested, it does not record the transaction for settlement and payment to the merchant's bank account. The VOICE AUTH transaction is used to place the previously voice authorized transaction in the current batch so that it will be settled and paid to the merchant.

A voice authorization is typically required when a SALE transaction is declined with the message CALL CENTER with a red background. Call the toll free number provided by the payment processor to obtain a numeric voice authorization code.

**Unsuccessful SALE Transaction**

If the credit card screen is still open, press the VOICE AUTH button. If the credit card screen is not open, select the order on the recall list and press the CREDIT button. Click cancel on the card swipe prompt and press the VOICE AUTH button. Enter the numeric voice authorization code received from the call center.



The image shows a software interface for entering a voice authorization code. On the left is a vertical menu with icons and labels: ORDER DETAILS, SWIPE CARD, KEYED ENTRY, DEBIT SALE, VOICE AUTH (highlighted with a red background), SETTINGS, TRANSACTIONS, HELP, and FINISHED. The main area has a title bar 'ENTER THE VOICE AUTHORIZATION CODE' and a disclaimer: 'IF THE PAYMENT PROCESSING NETWORK IS UNAVAILABLE, YOU CAN CALL A VOICE NUMBER FOR AN AUTHORIZATION. WHILE THIS VOICE AUTHORIZATION ASSURES YOU THAT THE CARD IS GOOD FOR THE AMOUNT REQUESTED, IT DOES NOT RECORD THE TRANSACTION FOR SETTLEMENT AND PAYMENT. THE VOICEAUTH TRANSACTION IS USED TO PLACE THE PREVIOUSLY VOICE AUTHORIZED TRANSACTION IN THE CURRENT BATCH SO THAT IT WILL BE SETTLED AND PAID.' Below this is a yellow input field containing '123456' and an orange back arrow button. A grey 'CANCEL' button is below the input field. A numeric keypad (0-9) is in the center. At the bottom right is a large green button with a white play icon, which is highlighted with a yellow border.

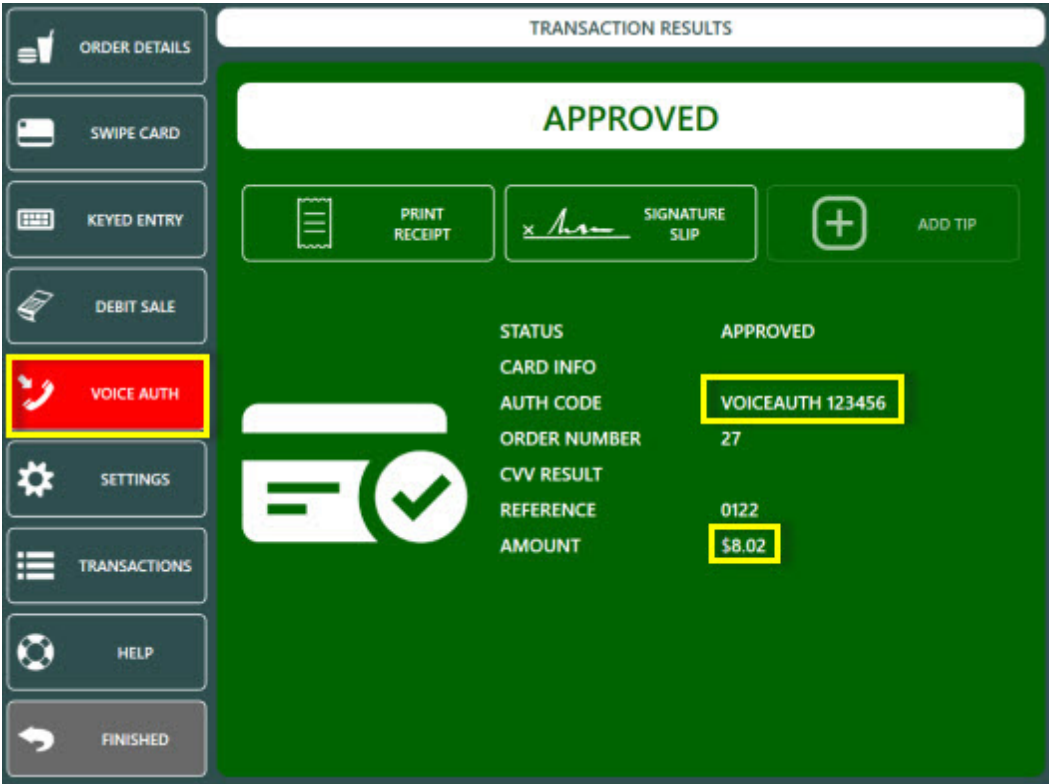
**Voice Authorization Code Entry**

Enter the sale amount and press the green button to process the transaction.

The screenshot shows the AmigoPOS 8 interface. On the left is a vertical menu with icons and labels: ORDER DETAILS, SWIPE CARD, KEYED ENTRY, DEBIT SALE, VOICE AUTH (highlighted with a red background), SETTINGS, TRANSACTIONS, HELP, and FINISHED. The main area has a title bar 'ENTER THE VOICE AUTH CHARGE AMOUNT'. Below it is a large yellow box displaying '\$8.02'. To the right of this box is a blue button with a white left-pointing arrow. Below the yellow box is a grey bar with the word 'CANCEL'. Below that is a numeric keypad with buttons for 1, 2, 3, 4, 5, 6, 7, 8, 9, and 0. At the bottom right of the keypad is a large green button with a white right-pointing arrow, which is highlighted with a yellow border.

**Voice Authorization Amount**

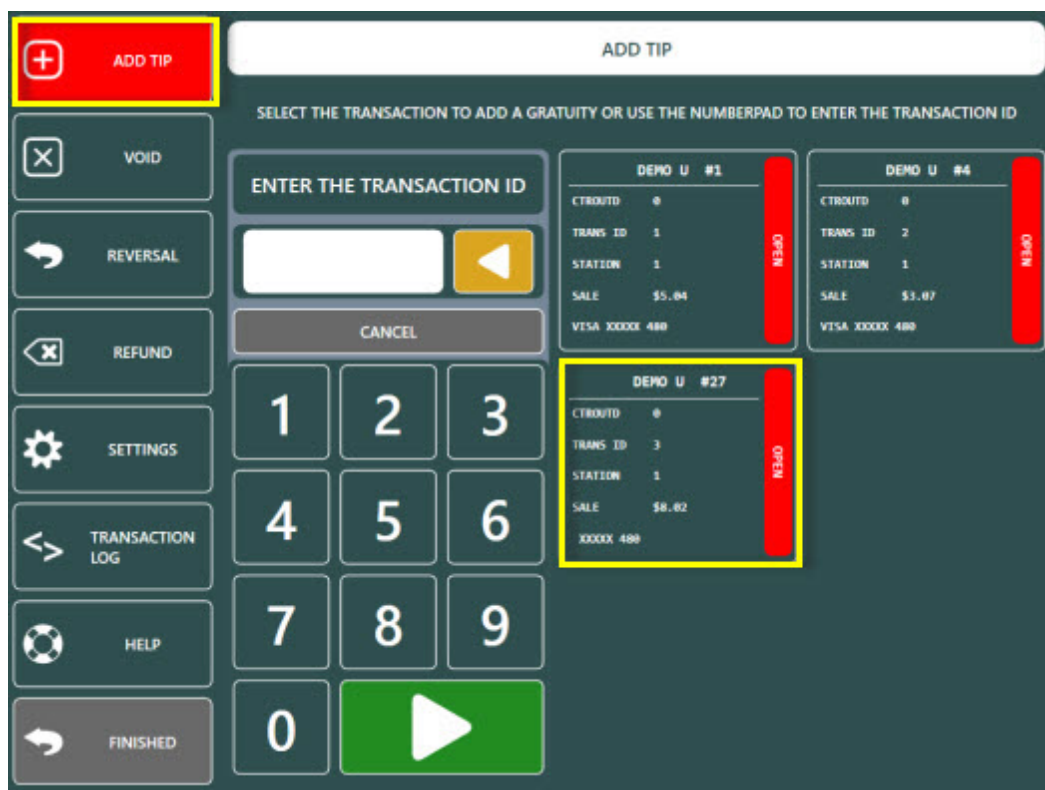
An approved VOICE AUTH transaction is displayed with a green background. The auth code and authorized amount are included in the results for confirmation. An approved VOICE AUTH transaction is added to the batch and will be settled at the next scheduled batch settlement.



Transaction Results

**ADD TIP**

The ADD TIP transaction type is used to add or adjust the tip amount on a previously processed SALE transaction. An incorrect tip amount can be corrected by running an additional ADD TIP transaction for the correct amount.

**Transactions List**

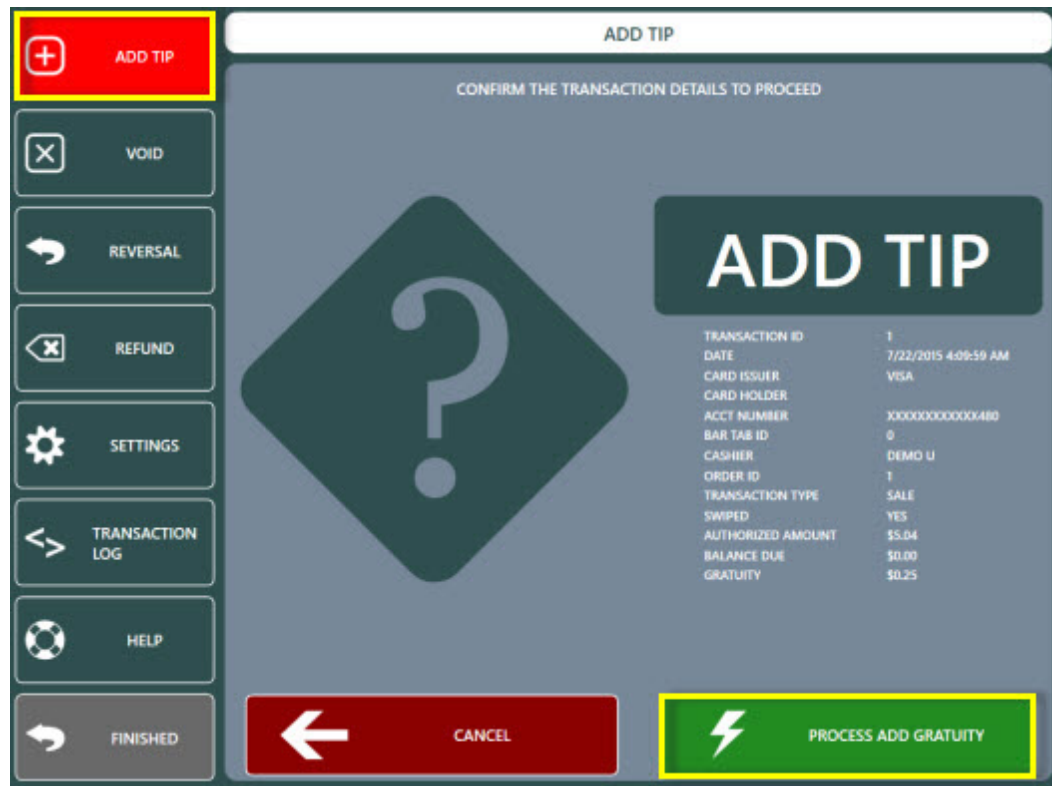
Login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad.

The screenshot shows a POS interface for entering a gratuity amount. At the top, a white header bar contains the text "ENTER THE GRATUITY AMOUNT". Below this is a large yellow rectangular input field. To the right of the input field is a brown button with a white left-pointing arrow. Below the input field is a grey button labeled "CANCEL". The main area contains a numeric keypad with buttons for digits 1 through 9 and 0. The bottom row of the keypad includes a green button with a white right-pointing arrow, which is highlighted with a yellow border. On the left side, there is a vertical sidebar with several buttons: "ADD TIP" (red with a white plus icon), "VOID" (dark grey with a white 'X' icon), "REVERSAL" (dark grey with a white curved arrow icon), "REFUND" (dark grey with a white 'X' icon), "SETTINGS" (dark grey with a white gear icon), "TRANSACTION LOG" (dark grey with a white double arrow icon), "HELP" (dark grey with a white lifebuoy icon), and "FINISHED" (dark grey with a white curved arrow icon).

**Tip Amount Entry**

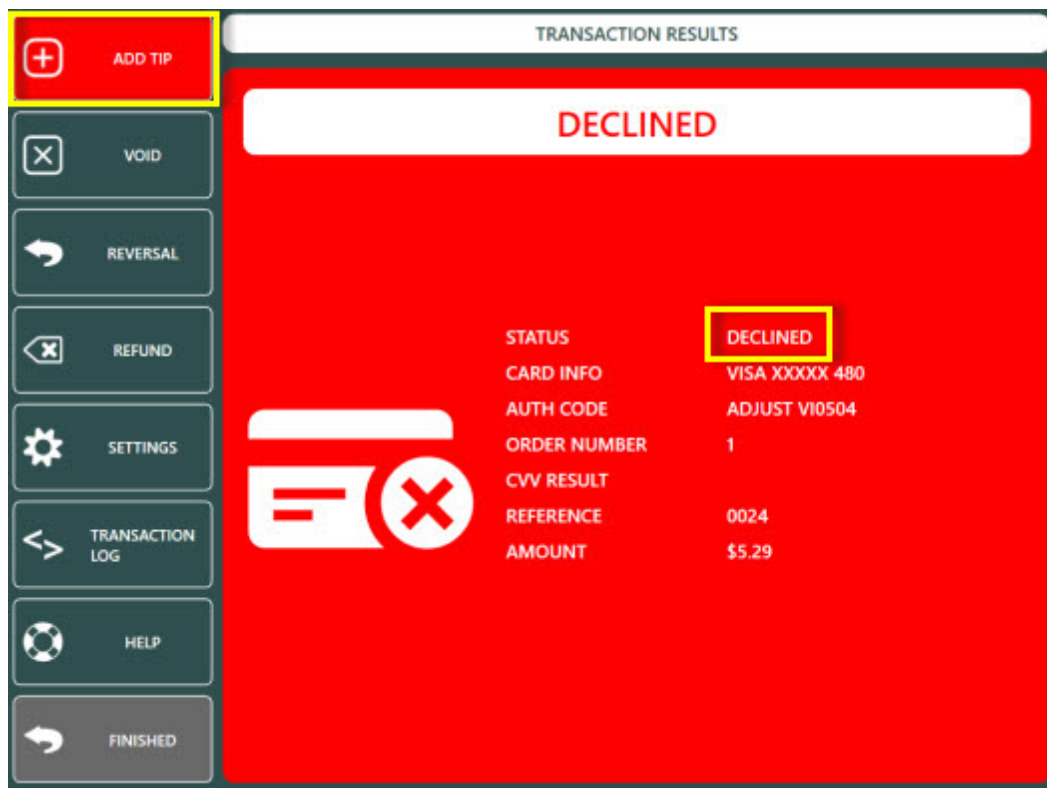
Review the transaction information shown on the confirmation screen and press the green button to process the transaction.





**Add Tip Confirmation**


A successful ADD TIP transaction is displayed with a green background. An unsuccessful ADD TIP transaction is displayed with a red background. In the example below, the ADD TIP transaction is declined because the SALE transaction was previously voided.



Transaction Results

**VOID**

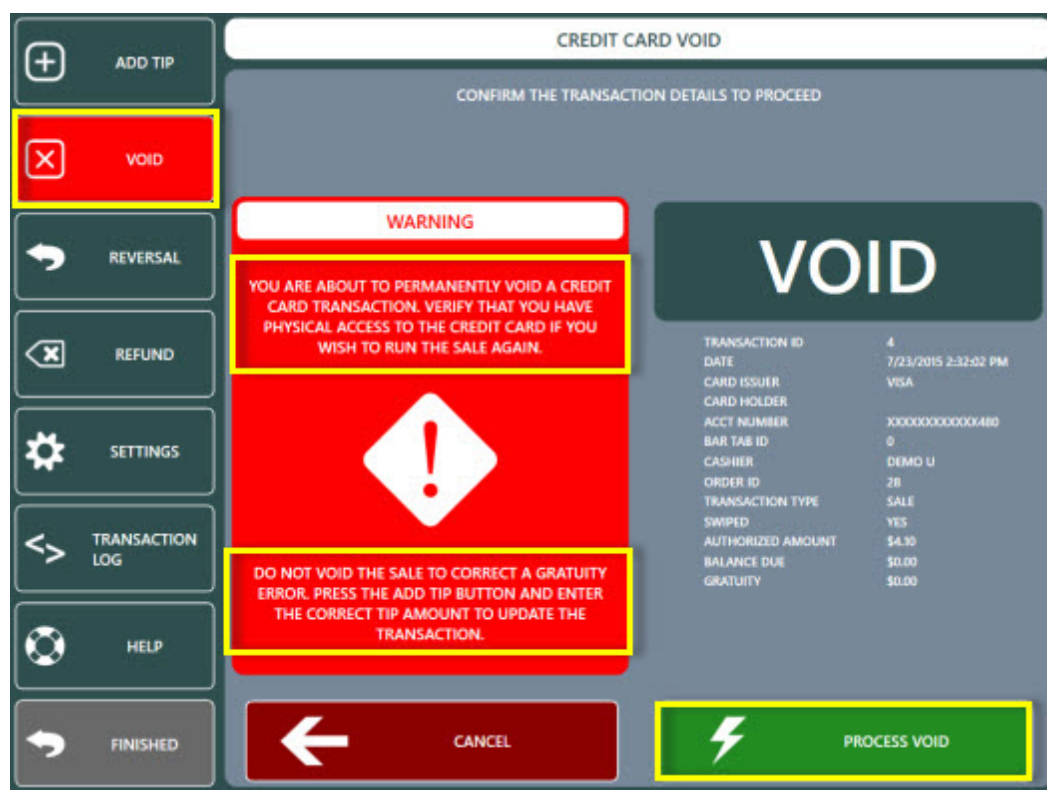
The VOID transaction type is used to void a previously completed sale (payment) transaction in the current batch on a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type).



**Warning: A credit card void is permanent and cannot be reversed**

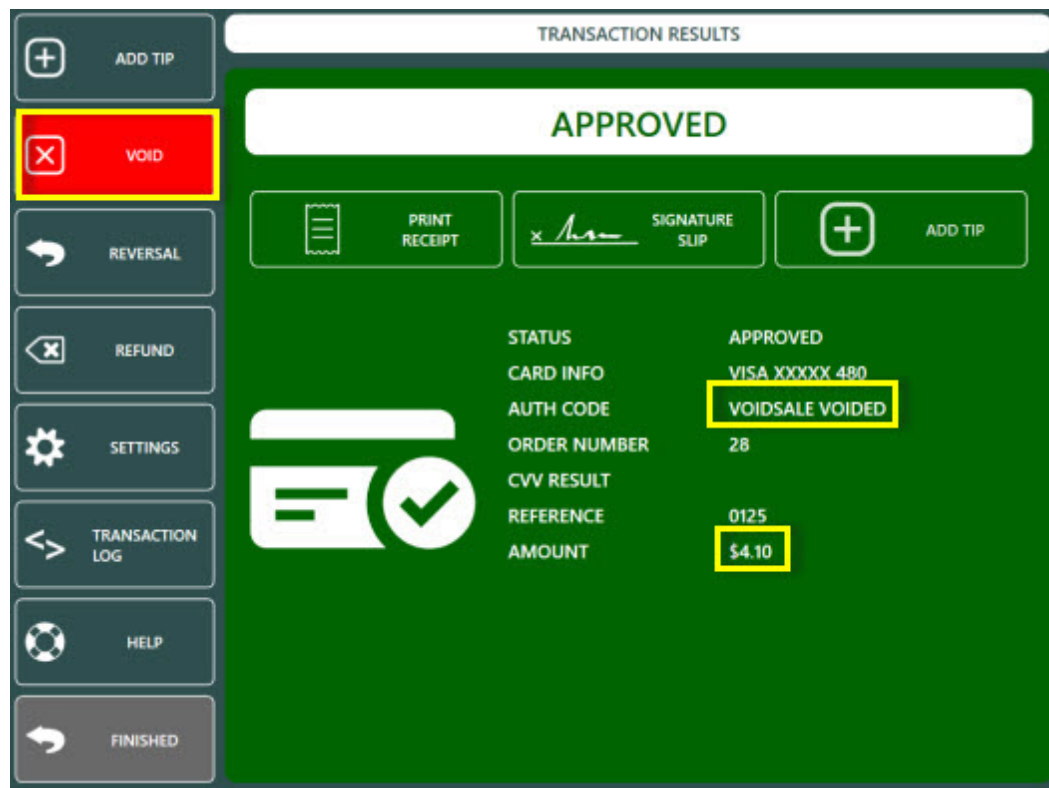
**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

Login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Press the VOID button and select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad. Review the transaction information shown on the confirmation screen and press the green button to process the VOID transaction.



#### Void Confirmation

A successful VOID transaction is displayed with a green background. An unsuccessful VOID transaction is displayed with a red background.

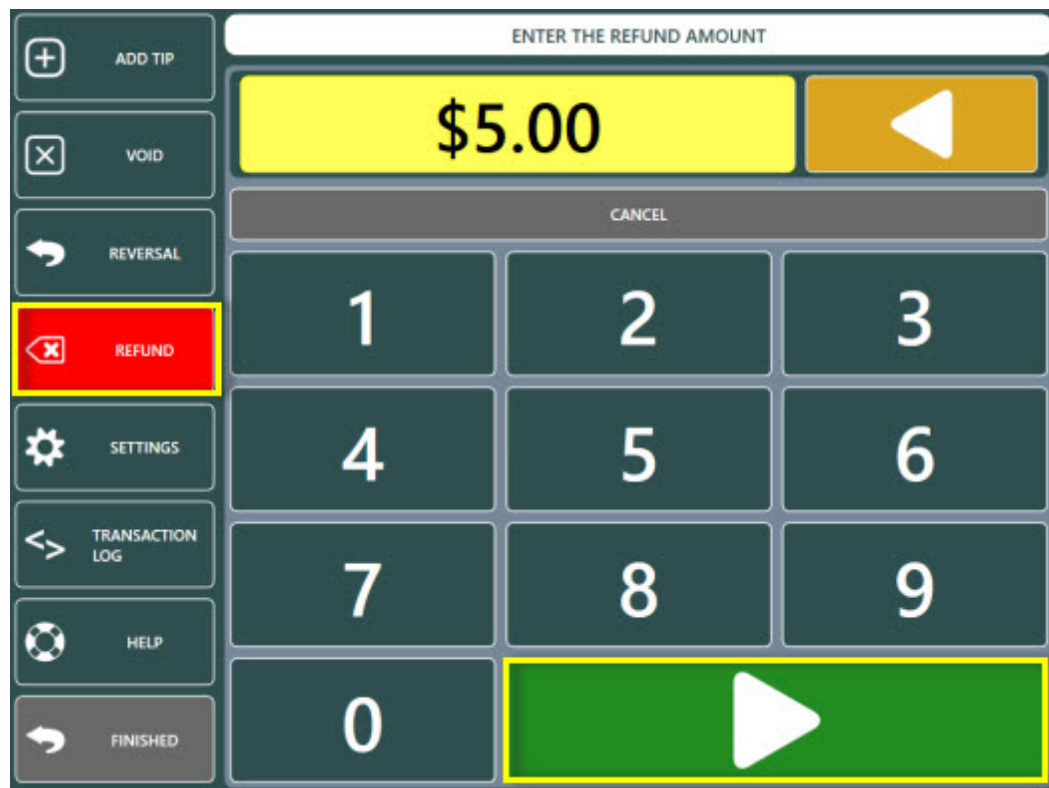


Transaction Results

**REFUND**

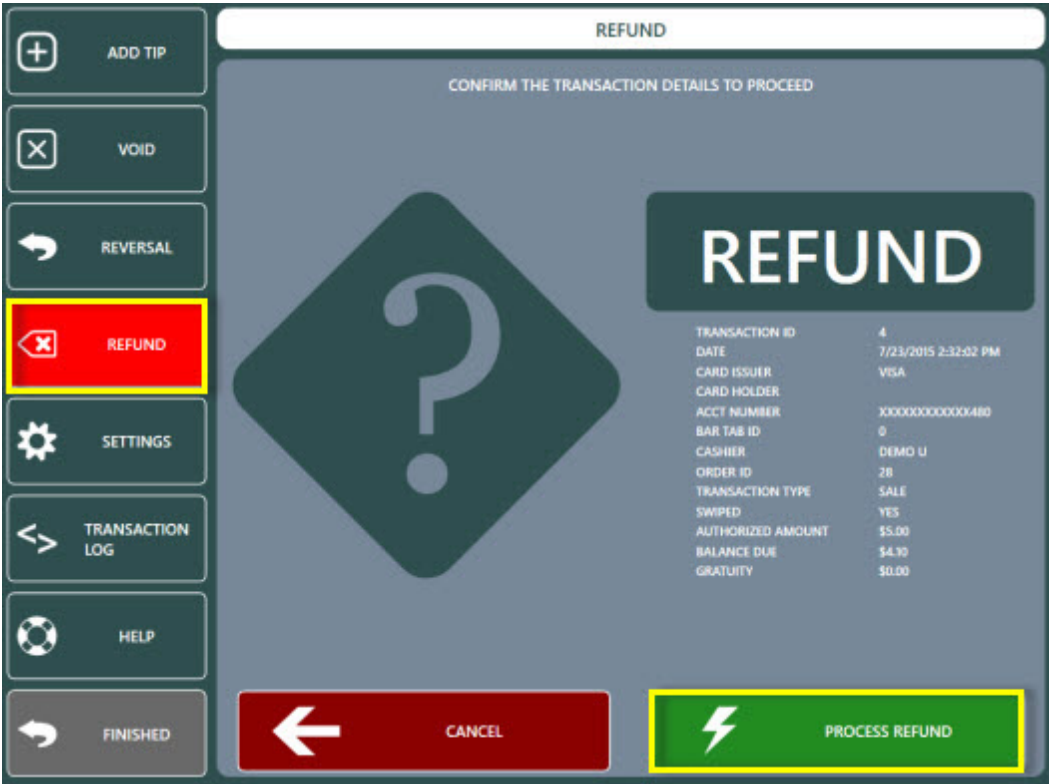
The REFUND transaction type is used to process a return (Mercury Pay and NETePay refer to a refund as a RETURN transaction) to a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type).

To start a refund transaction, recall the order and press the CREDIT button. Click Cancel on the card swipe prompt and press the REFUND button to enter the refund amount using the on-screen number pad.



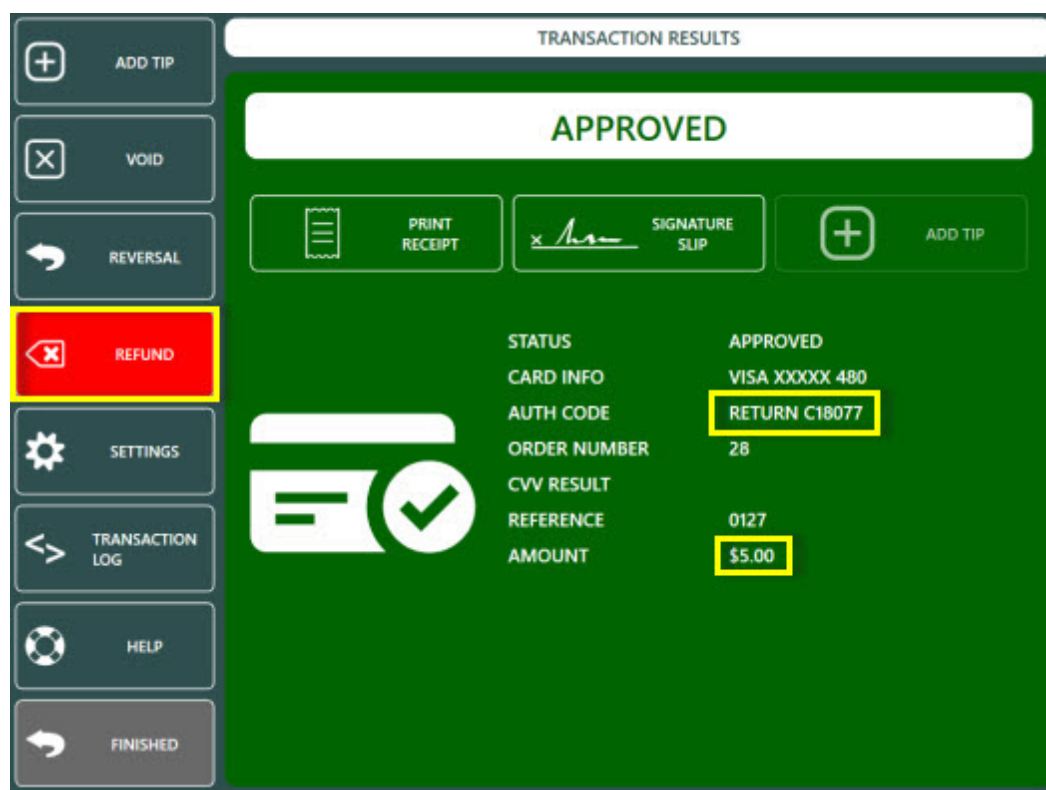
**Refund Amount Entry**

Review the transaction information shown on the confirmation screen and press the green button to process the REFUND transaction.



Refund Confirmation


A successful REFUND transaction is displayed with a green background. An unsuccessful REFUND transaction is displayed with a red background.



Transaction Results

**REVERSAL**

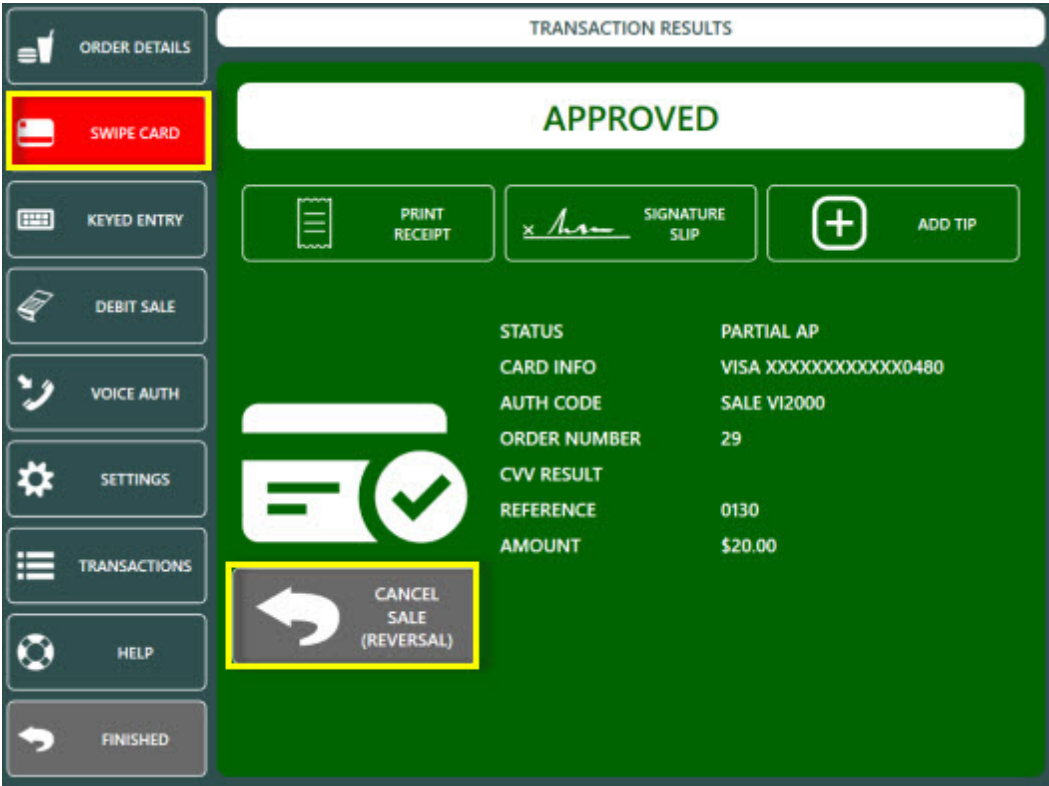
The REVERSAL transaction type is used to void a previous SALE transaction. REVERSAL differs from the VOID transaction type in that the funds are returned to the customer's card immediately upon a successful REVERSAL transaction. A VOID transaction will return the funds to the customer's card within 3-7 days. The REVERSAL transaction is available only for SALE transactions in the current batch.



**Warning: A credit card void is permanent and cannot be reversed**

**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

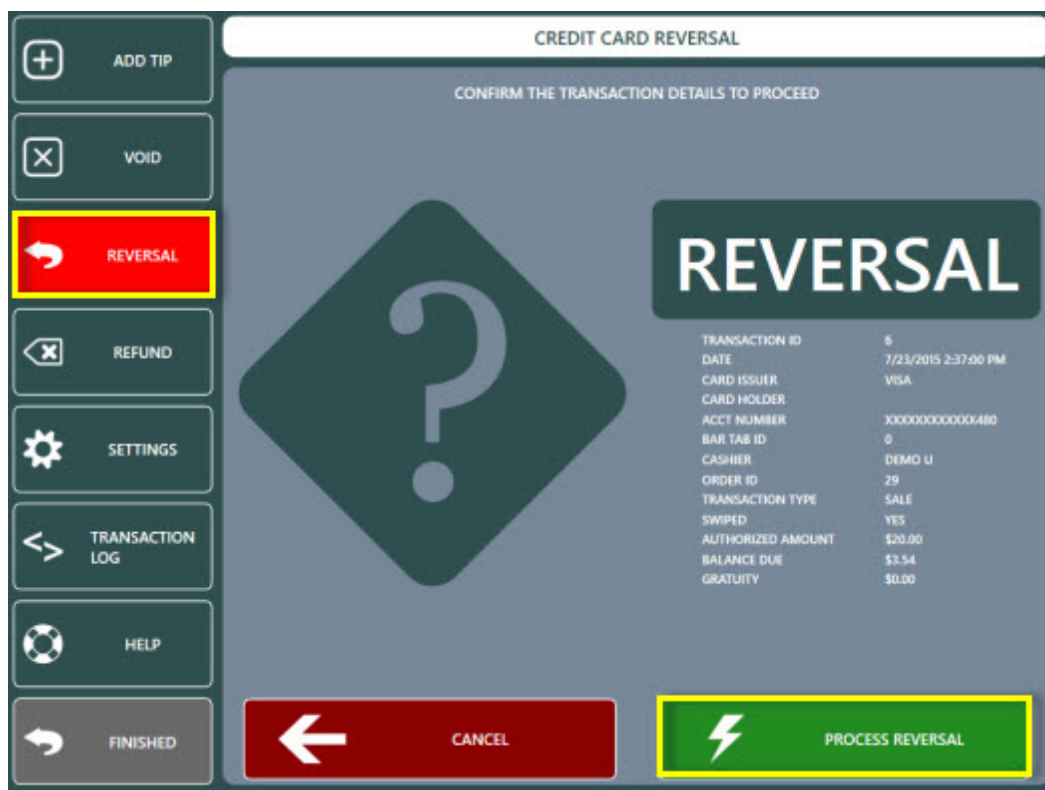
A typical scenario for a REVERSAL transaction is when a prepaid card is authorized for a partial amount of the balance due and the customer wishes to use a different card. A successful SALE transaction displays the REVERSAL button on the results screen. If the credit card screen is not open, login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Press the REVERSAL button at the left and select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad.



**SALE Transaction Results**

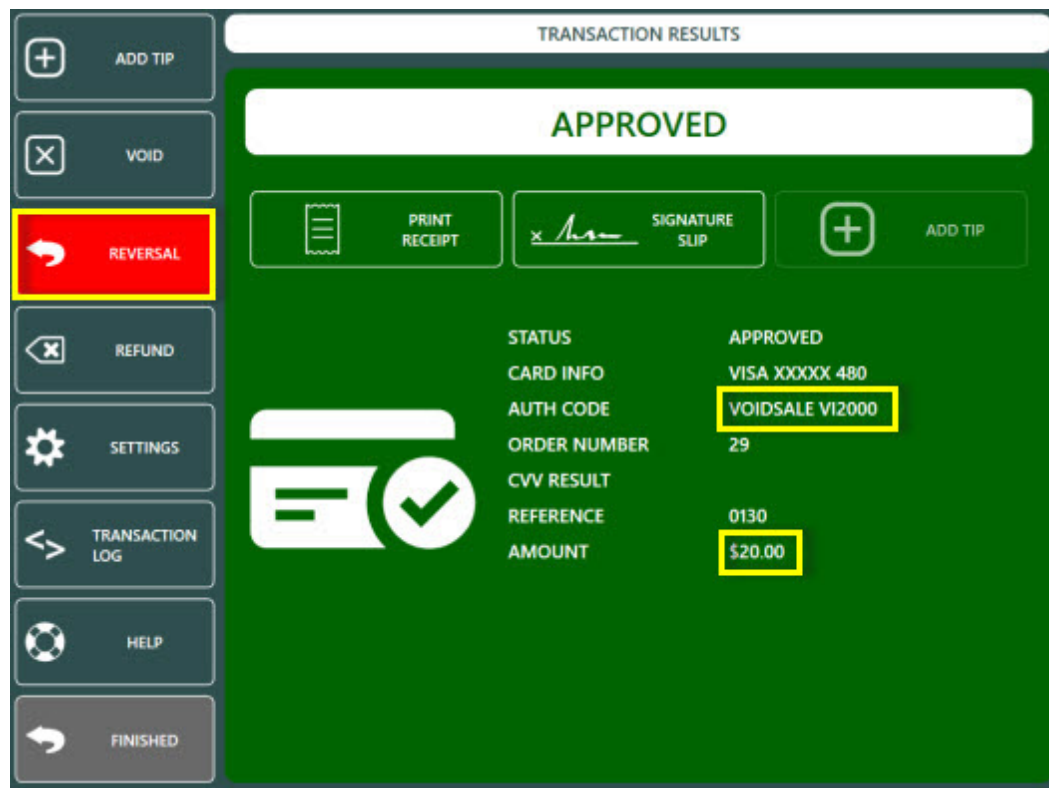
Review the transaction information shown on the confirmation screen and press the green button to process the REVERSAL transaction.





**Reversal Confirmation**

A successful REVERSAL transaction is displayed with a green background. An unsuccessful REVERSAL transaction is displayed with a red background.

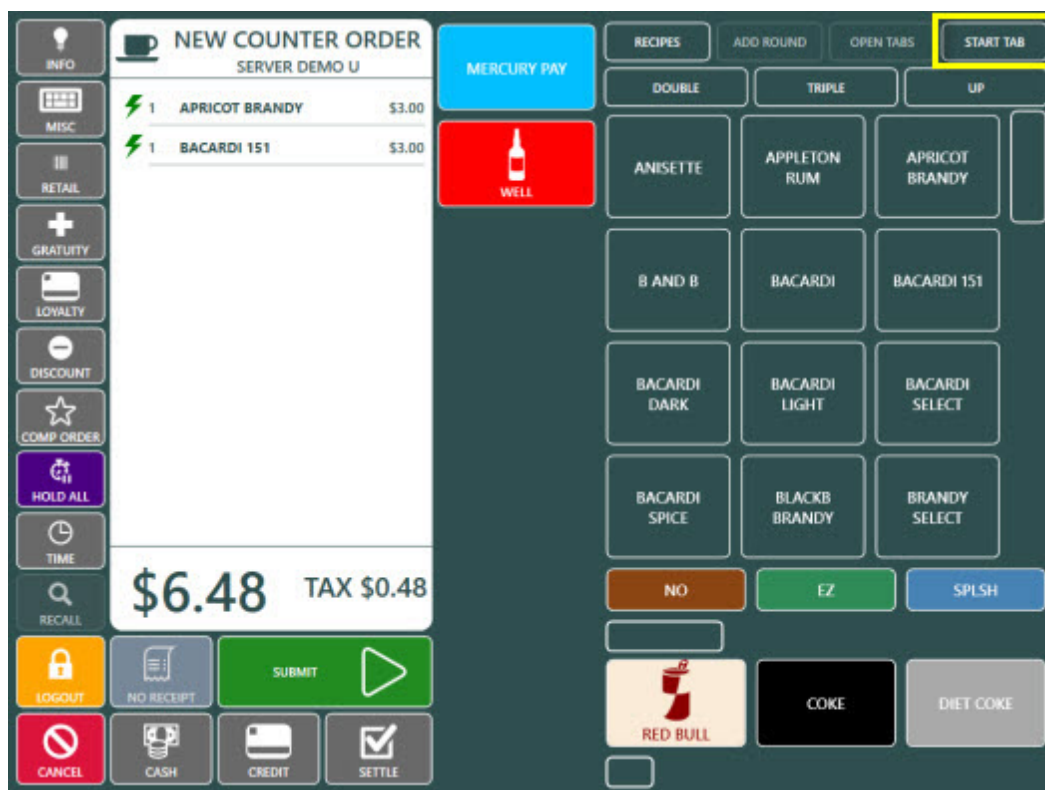


Transaction Results

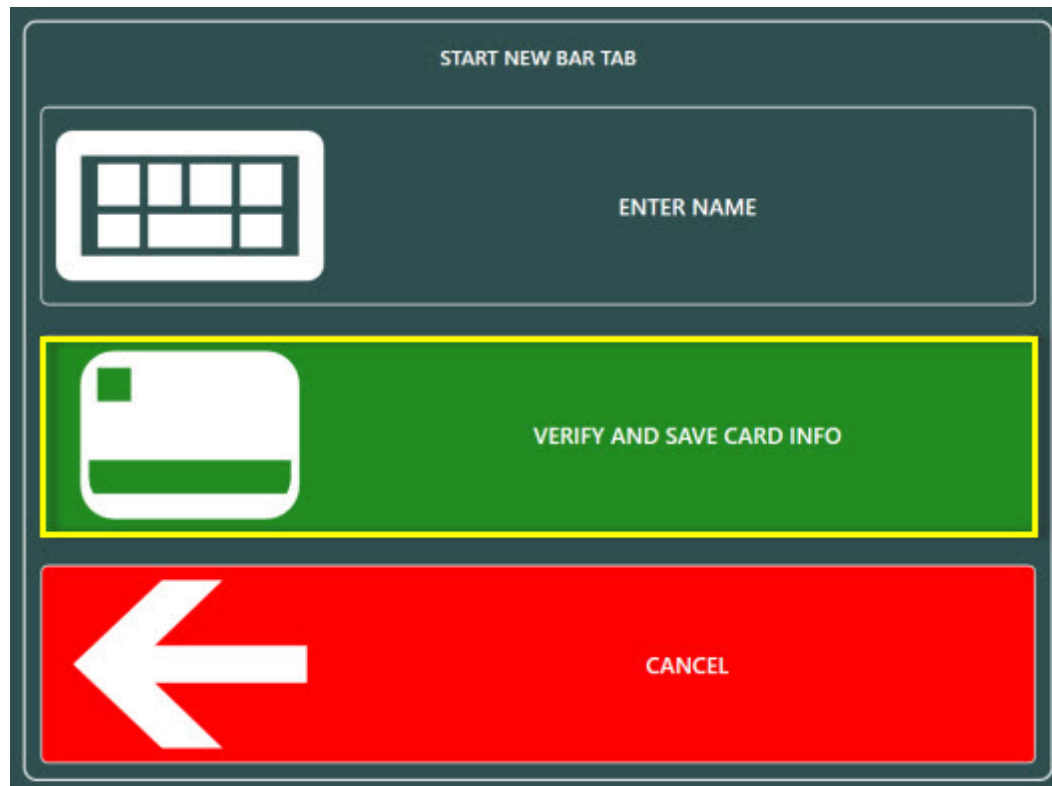
**ZERO AUTH**

The ZERO AUTH transaction type is used to inquire whether a credit card is valid for processing without charging any amount. The POS uses the ZERO AUTH transaction only when starting a new bar tab and does not charge the customer's card but does store a token that is returned from the payment processor if the ZERO AUTH transaction is approved. The token is later used to process a SALE transaction for the balance due, and any subsequent adjustments such as adding a tip.

Start a bar order and press the START TAB button at the top left.

**Start Bar Tab**

Select VERIFY AND SAVE CARD INFO on the new bar tab screen.

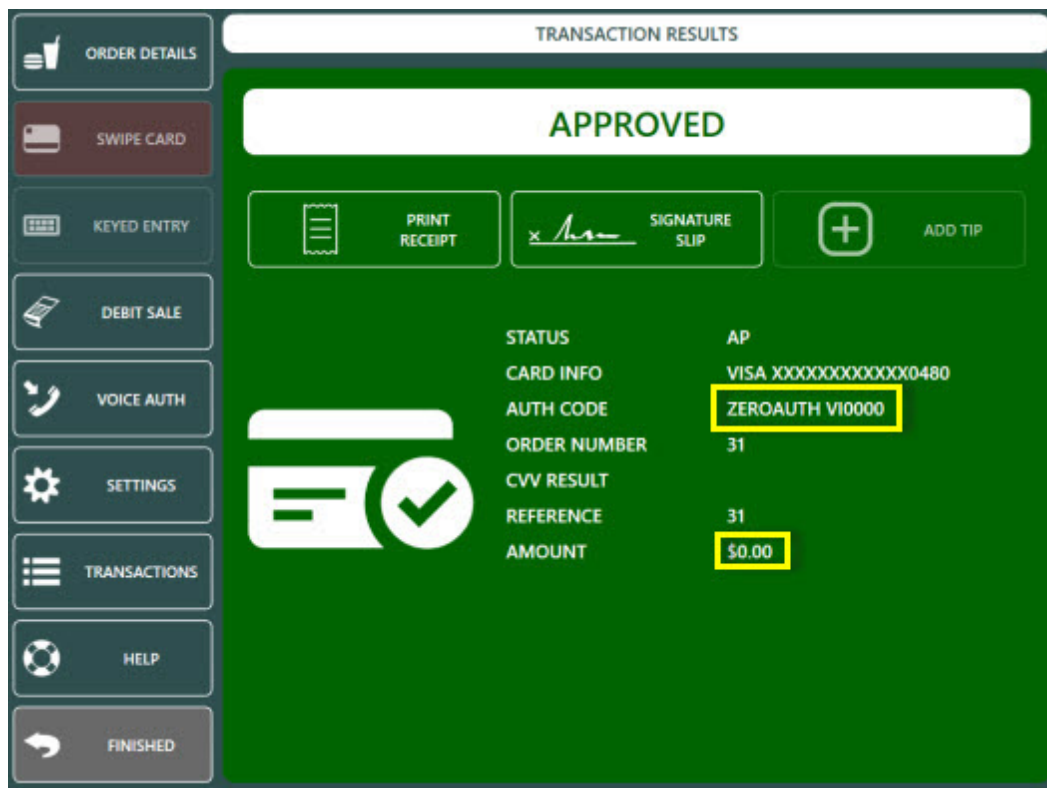
**Select Bar Tab Method**

Swipe the card to process the ZERO AUTH transaction. The transaction is canceled if the card is not swiped within 20 seconds.



**Card Swipe Prompt**

A successful ZERO AUTH transaction is displayed with a green background. An unsuccessful ZERO AUTH transaction is displayed with a red background.



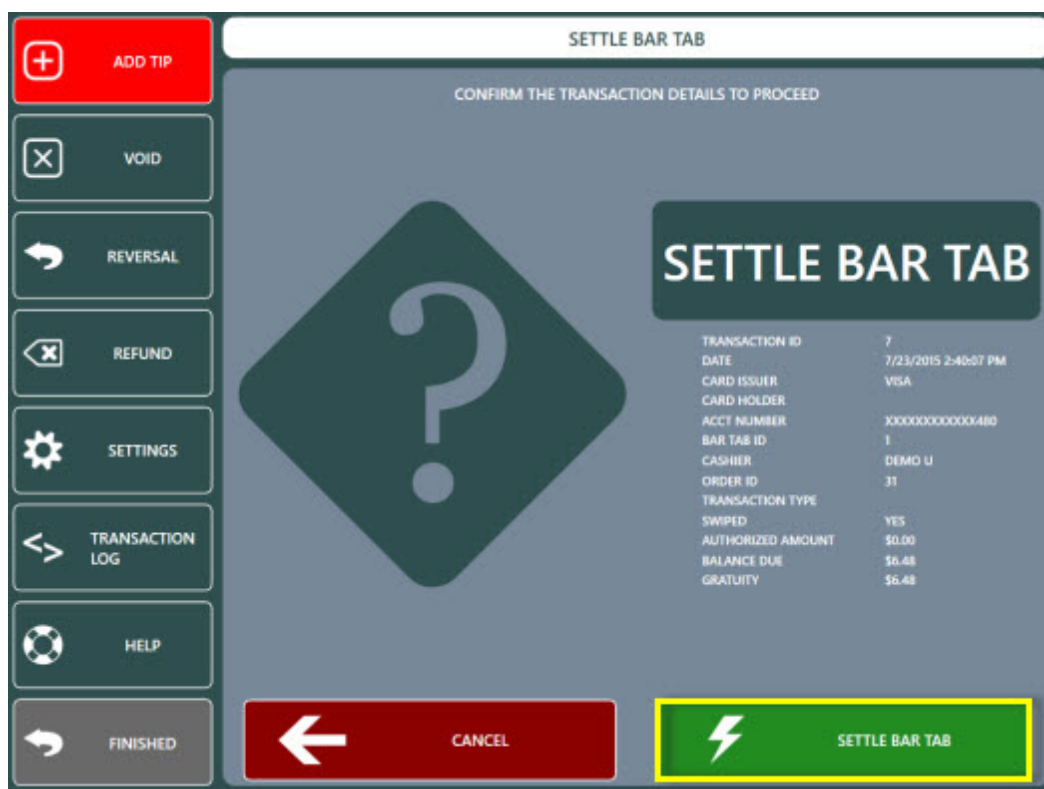
Transaction Results

When the customer is ready to make payment, locate the order on the recall list and press the CAPTURE button.



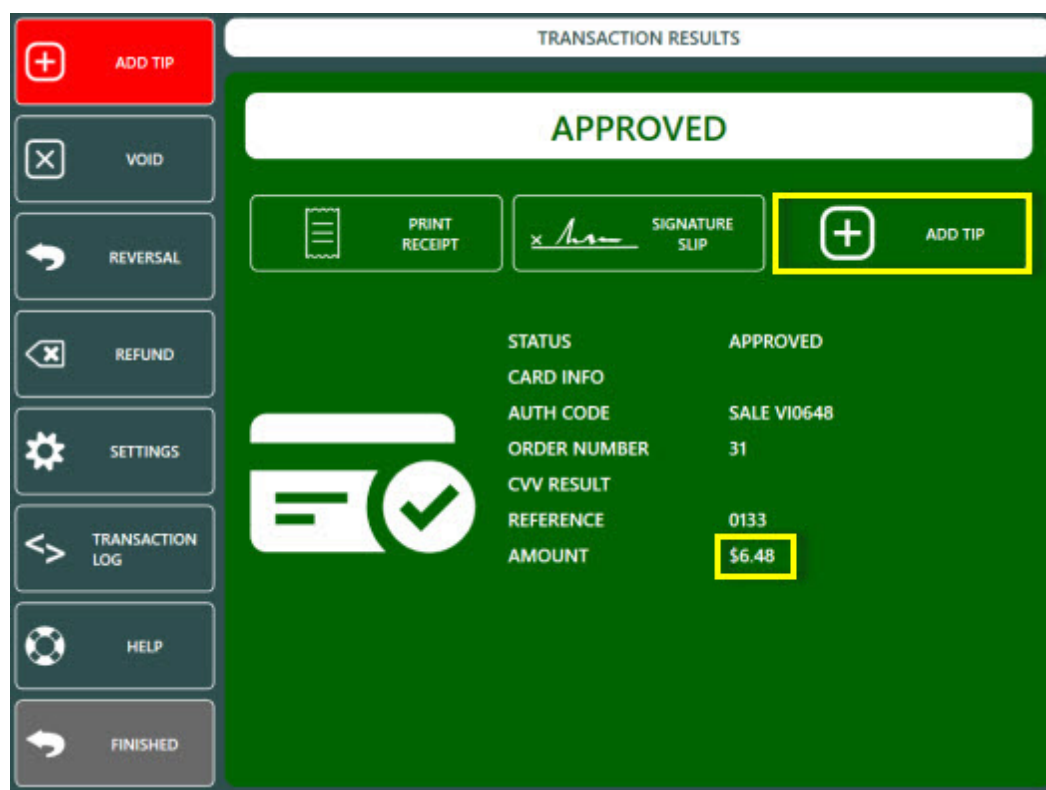
Order Recall List

Review the transaction information shown on the confirmation screen and press the green button to process the SALE transaction.



**Sale Transaction Confirmation**

A successful SALE transaction is displayed with a green background. An unsuccessful SALE transaction is displayed with a red background. If the customer has specified a gratuity on the signature slip, press the ADD TIP button to adjust the SALE transaction.



Transaction Results

### 10.6.6 Partial Approvals

AmigoPOS supports partial approval transactions as per recent payment processor regulations. When a Debit or Prepaid authorization is initiated, the issuer can respond with an approval amount less than the requested amount. Merchants can conduct split-tender purchases by allowing debit and prepaid card issuers to approve a portion of the original transaction amount in the authorization request when the transaction amount exceeds the funds available on the card. The merchant can then initiate split-tender processing and obtain the remainder of the purchase amount in another form of payment.

A partial approval transaction is identical to a credit card approval and the cashier is given the option to reverse the partial approval so that the funds are immediately returned to the customer's card. The following images illustrate a typical partial approval transaction and corresponding reversal.

A transaction for \$23.62 is attempted and the payment processor has returned a partial approval for \$20.00, resulting in a balance due of \$3.62.



**TRANSACTION RESULTS**

**APPROVED**

PRINT RECEIPT | SIGNATURE SLIP | ADD TIP

STATUS	PARTIAL AP
CARD INFO	M/C *****0434
AUTH CODE	EMVSALE 000000
ORDER NUMBER	4
CVV RESULT	
REFERENCE	1025
AMOUNT	\$20.00

**CANCEL SALE (REVERSAL)**

**BALANCE DUE: \$3.62**

The cashier can press the gray CANCEL SALE button to reverse the partial approval so that the funds are immediately returned to the customer's account.

**CREDIT CARD REVERSAL**

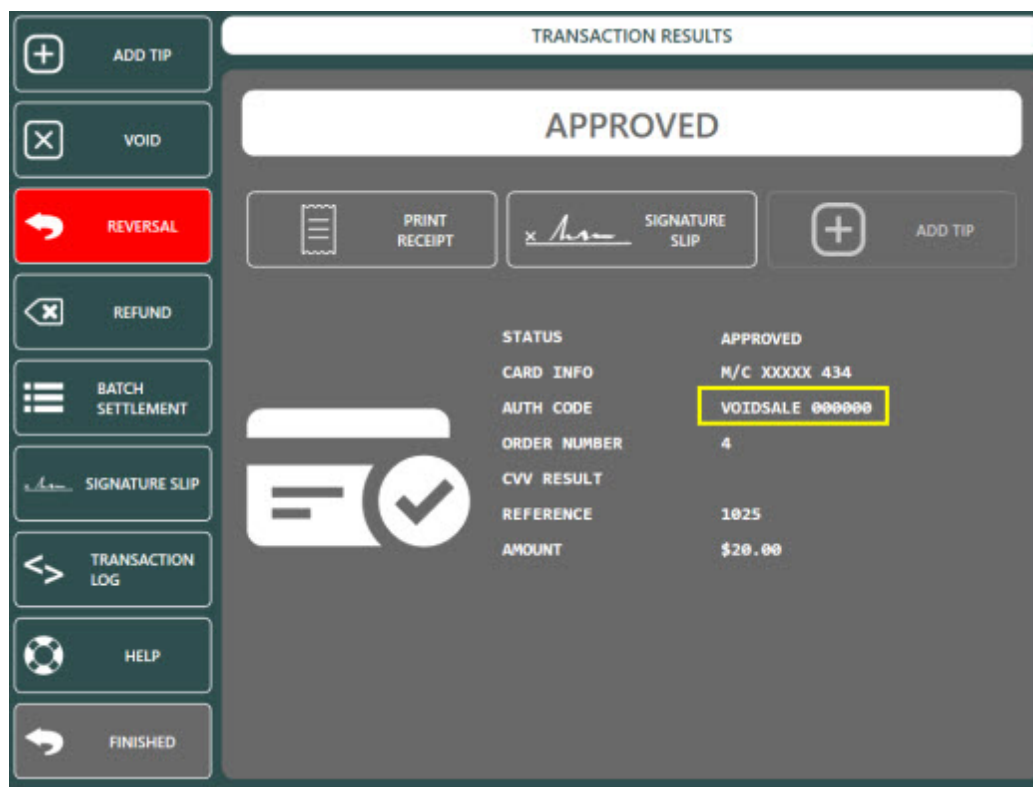
CONFIRM THE TRANSACTION DETAILS TO PROCEED

**REVERSAL**

TRANSACTION ID	1
DATE	12/12/2016 6:15:43 AM
CARD ISSUER	M/C
CARD HOLDER	Test Card 10
ACCT NUMBER	XXXXXXXXXXXX0434
BAL TAB ID	0
CASHIER	DEMO U
ORDER ID	4
TRANSACTION TYPE	SALE
SWIPED	YES
AUTHORIZED AMOUNT	\$20.00
BALANCE DUE	\$3.62
GRATUITY	\$0.00

**CANCEL** | **PROCESS REVERSAL**

The issuer returns an approval indicating that the transaction has been successfully voided.



## 10.7 OpenEdge (formerly XCharge)

### 10.7.1 Overview

OpenEdge Edgelink (formerly XCharge) offers PCI compliant and EMV capable credit card processing that integrates directly with AmigoPOS and requires a merchant account from OpenEdge. AmigoPOS does not store any sensitive credit card information. All sensitive credit card data is passed directly between the OpenEdge client components and OpenEdge PC (formerly XCharge Server) so that the pos is entirely out of scope.

#### Initial Setup

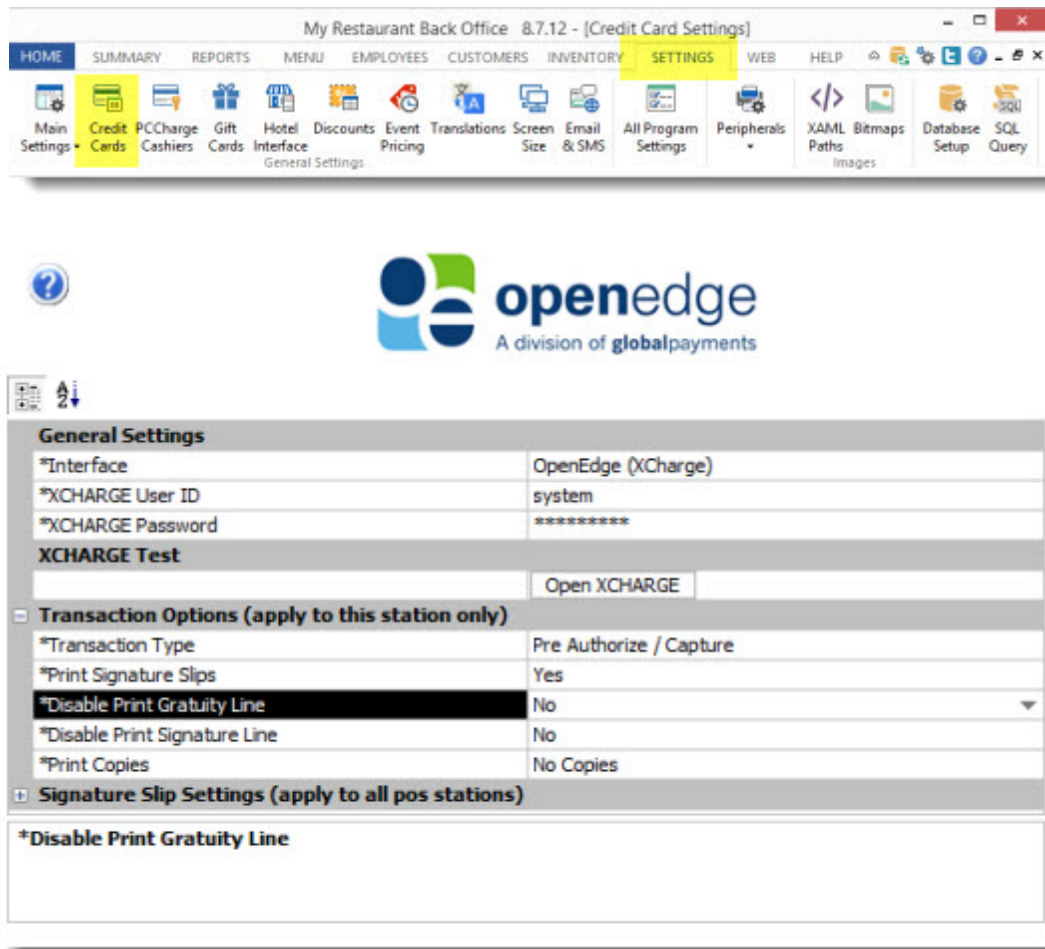
Contact OpenEdge to obtain a merchant account and obtain OpenEdge PC (formerly XCharge Server)  
Install OpenEdge PC at the pos station and run a test transaction to verify that the account is set up correctly  
Enter back office settings

#### OpenEdge Contact Information

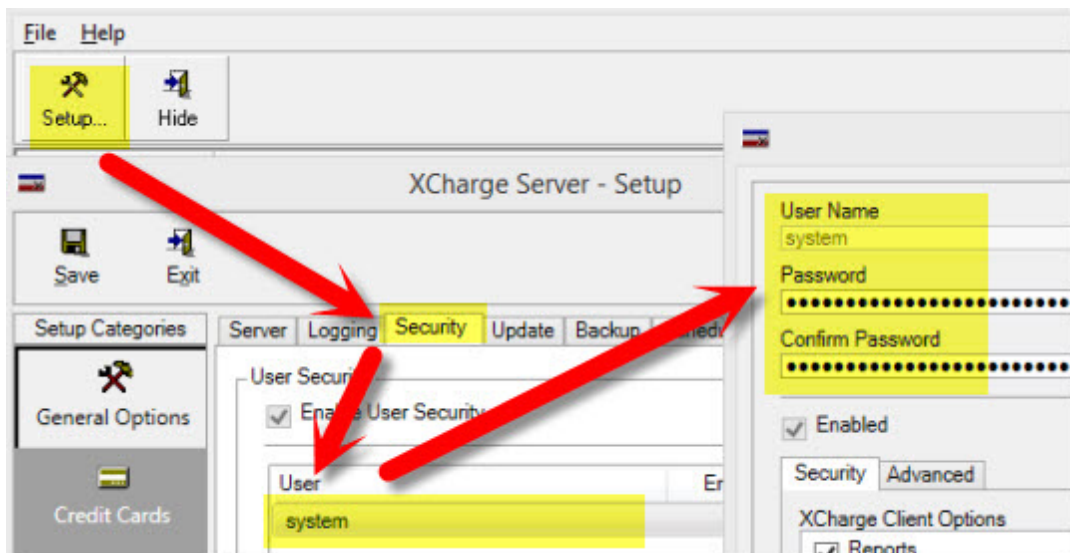
800.774.6462, Option 1  
solutions@openedgepay.com

### 10.7.2 Setup

Install **OpenEdge XCharge** at the main pos station using the parameters provided by OpenEdge and run a test transaction. Open **Back Office>Settings>Credit Cards** and enter the settings as described below.



- **Interface:** Select **OpenEdge (XCharge)** from the drop-down list
- **XCharge User ID/Password:** Enter the user and password displayed on the security screen in XCharge Server as shown below



- **Transaction Type:** Select the transaction type to use. Note that bar tabs are always processed using PreAuth/Capture.
  - **Pre Authorize/Capture:** When using Pre Authorize/Capture transactions, first pre-authorize the sale and present the customer with a signature slip. After the customer has entered the gratuity amount and total (and signs the signature slip when required), capture the transaction to add the transaction to the current batch. Note that all **Pre Authorized transactions must be captured, even if the gratuity amount is zero**. This transaction method is generally used only by restaurants that accept gratuities.
  - **SALE/ADD GRATUITY:** When using Sale/Add Gratuity Transactions, the sale is captured immediately after running the card, and adding a gratuity is optional. If a gratuity must be added, return to the order settlement screen and select the Credit Card payment type again. Touch the 'ADD TIP' button to add a gratuity to the sale. This transaction type is generally used in a retail environment or in restaurants where gratuities are not used (i.e. fast food).
 

***Hint: When using Sale/Add Gratuity transactions, if a mistake was made when adding the gratuity, add another gratuity by reopening the order and touching the 'Change Gratuity' button. The original gratuity value is overwritten by the new gratuity value.***
- **Print Signature Slips:** Specify whether to automatically print a signature slip upon a successful Sale or PreAuth.
- **Disable Print Gratuity Line:** The signature slip gratuity line is visible. Fast food or takeout restaurants where gratuities are not accepted do not require a gratuity line.
- **Disable print Signature Line:** Specify whether to disable the signature line on the signature slip. Note that the signature line can also be suppressed based on the amount as described in the [signature slip settings](#) <sup>535</sup>.
- **Print Copies:** Specify whether to print additional copies of the signature slip.

### 10.7.3 Usage

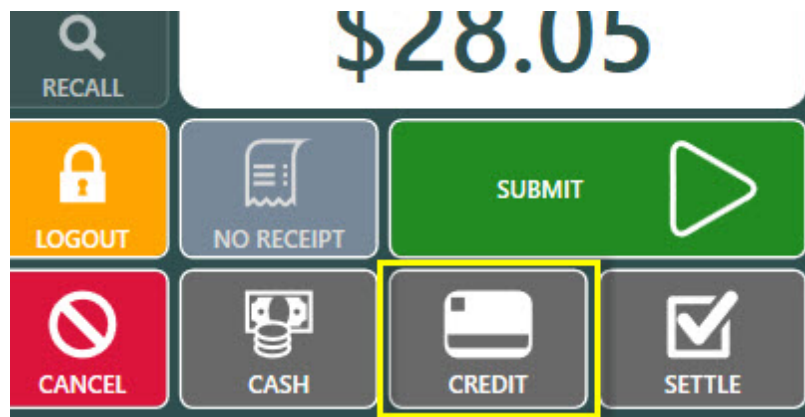
The transaction types listed below are available when using the PDCX integration method with either the Mercury Pay or Datacap NETePay integrated credit card processing interface.

- [SALE](#) <sup>358</sup>
- [DEBIT](#) <sup>359</sup>
- [VOICE AUTH](#) <sup>359</sup>
- [ADD TIP](#) <sup>363</sup>
- [VOID](#) <sup>367</sup>
- [REFUND](#) <sup>369</sup>
- [REVERSAL](#) <sup>372</sup>
- [ZERO AUTH](#) <sup>375</sup> (for Bar Tabs)

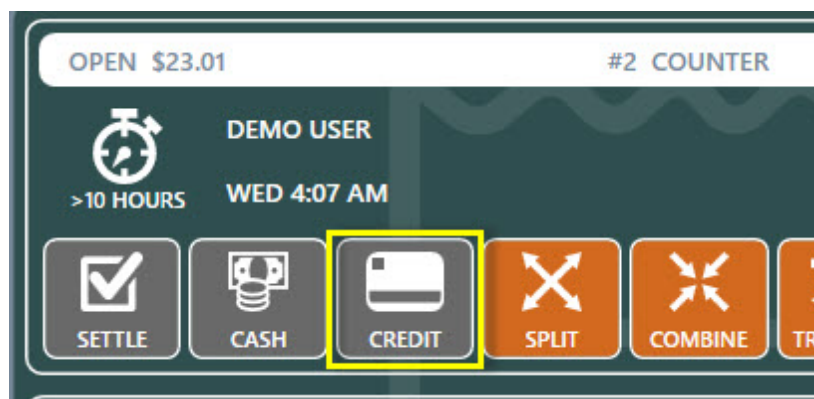
#### SALE

The SALE transaction type is used to process a payment on a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type). An approved sale transaction is added to the batch and will be settled at the next scheduled batch settlement and can be adjusted to add a tip before the batch is settled.

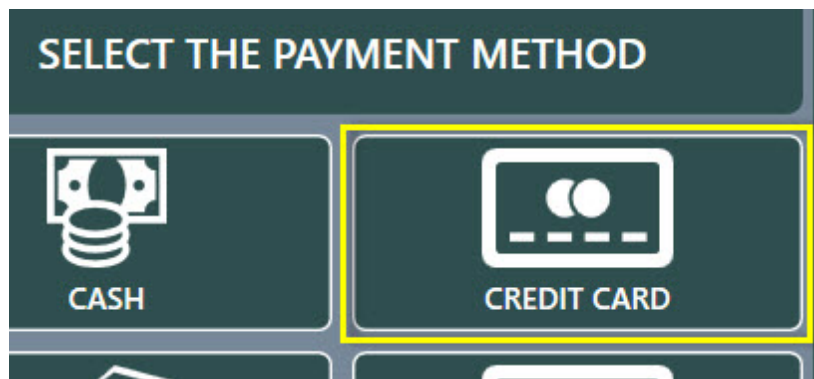
The SALE transaction can be initiated directly from the order entry screen, the order recall list or the settle screen.



Order Entry Screen

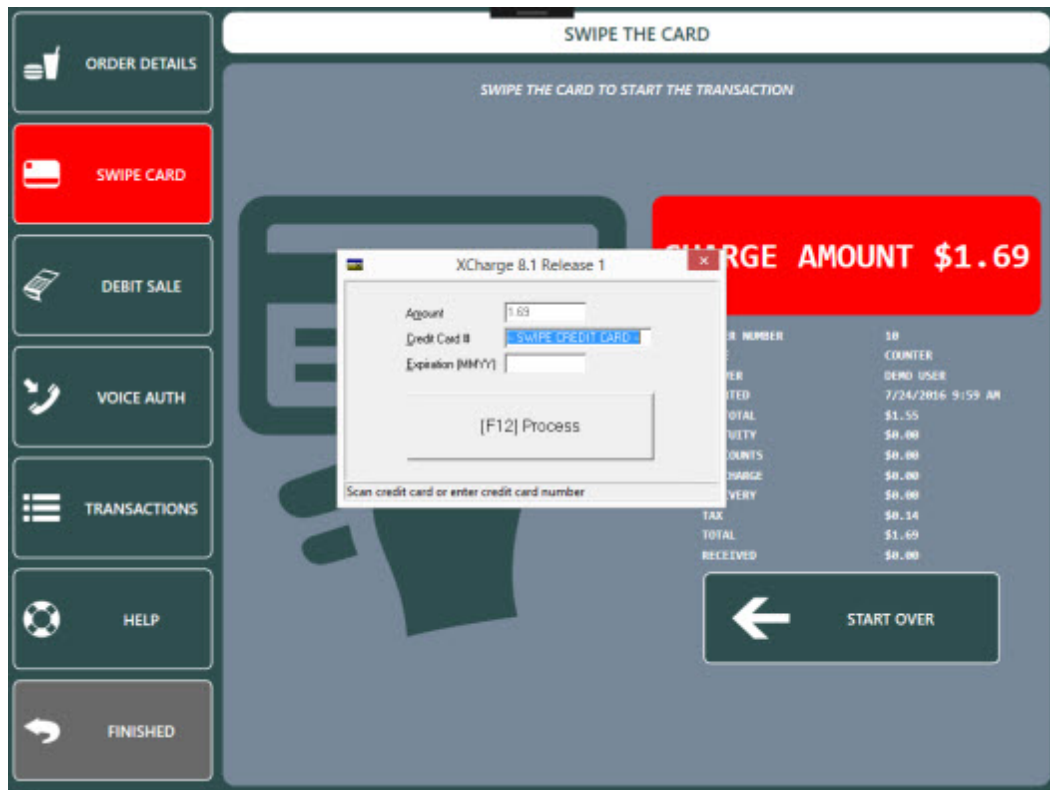


Order Recall List



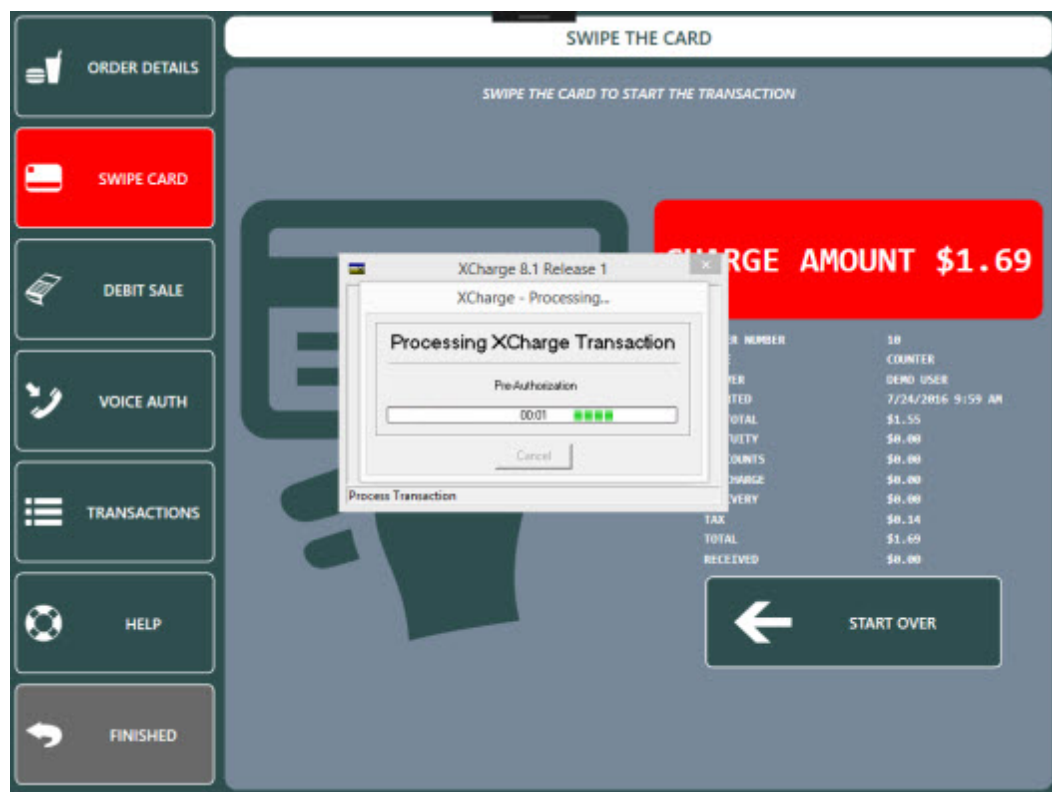
Settle Screen

Press the CREDIT button to automatically initialize the card reader and display the card swipe prompt.

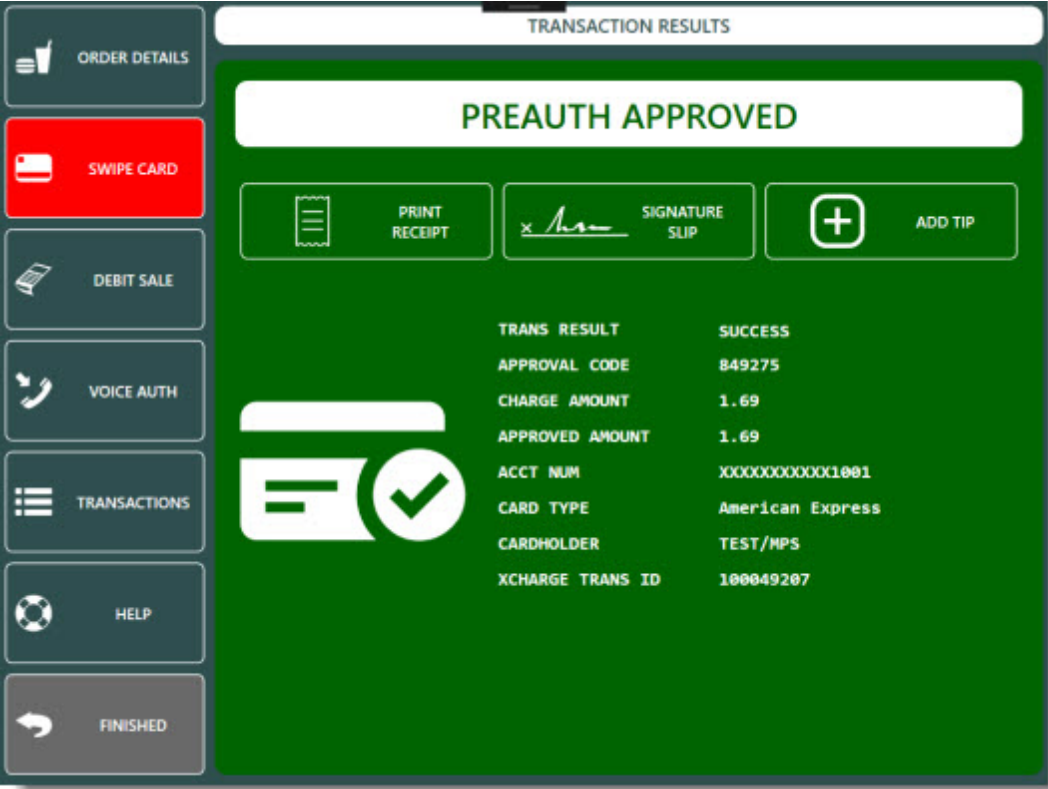


**Card Swipe Prompt**

The transaction is sent to the server. The "Processing...Please Wait" prompt is displayed until a response is received from the payment processor, generally in 3-5 seconds.



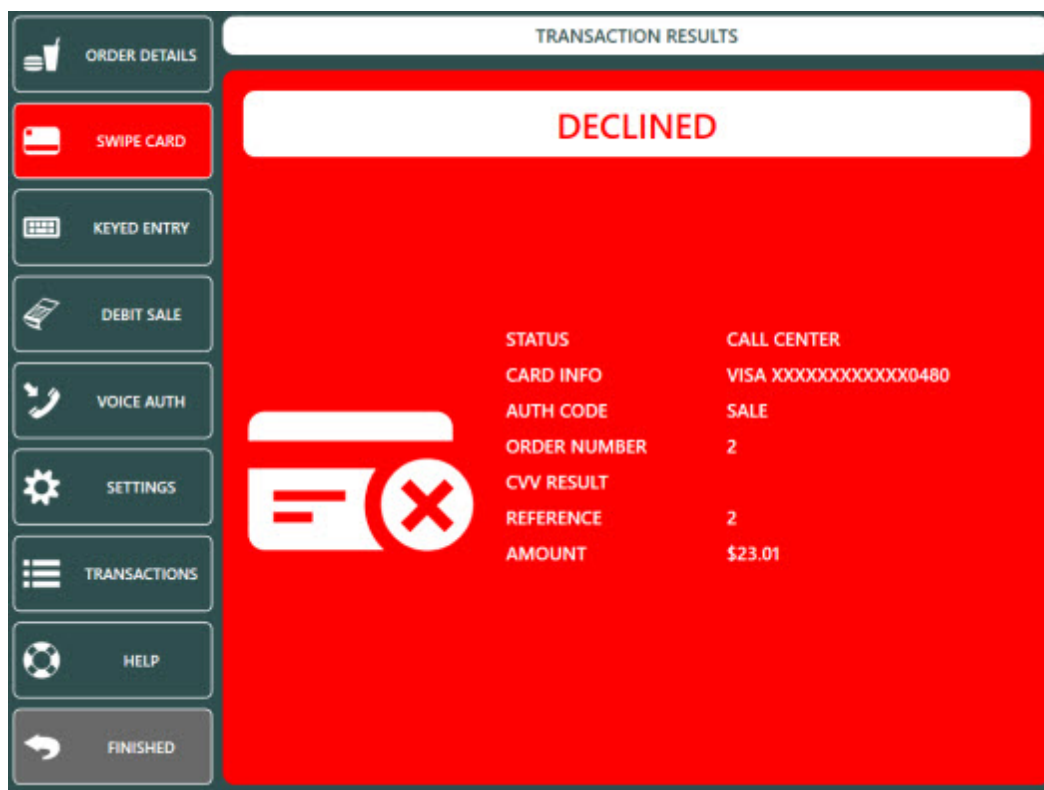
A green background indicates a successful transaction.



**Successful SALE Transaction**

A red background indicates a declined transaction or transaction error. The CALL CENTER message displayed below indicates that the cashier must call the payment processor to provide additional information before the transaction can be approved.





#### Unsuccessful SALE Transaction

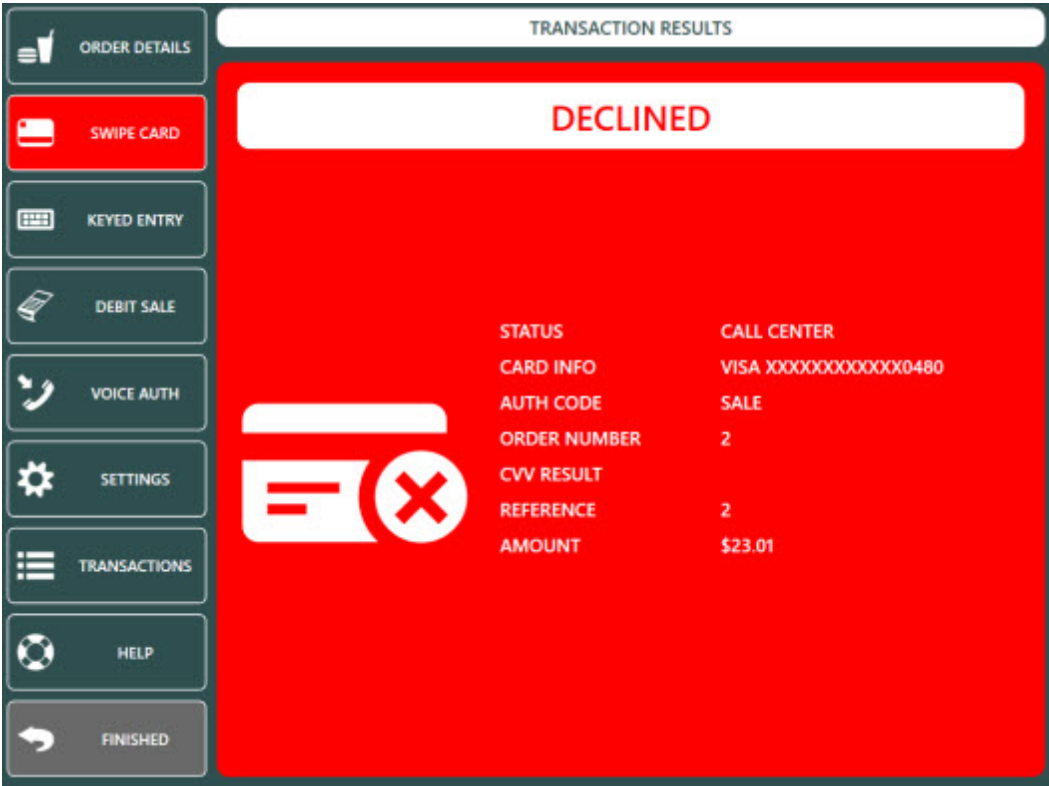
##### DEBIT

Debit card transactions require a compatible pinpad. Note that the ADD TIP transaction is not available for debit card transactions. An approved debit card transaction is added to the batch and will be settled at the next scheduled batch settlement.

##### VOICE AUTH

The VOICE AUTH transaction type is used to process a transaction for which a voice authorization code was previously obtained. If the payment processing network is unavailable, the merchant can call a voice number for an authorization. While this voice authorization assures the merchant that the card is good for the amount requested, it does not record the transaction for settlement and payment to the merchant's bank account. The VOICE AUTH transaction is used to place the previously voice authorized transaction in the current batch so that it will be settled and paid to the merchant.

A voice authorization is typically required when a SALE transaction is declined with the message CALL CENTER with a red background. Call the toll free number provided by the payment processor to obtain a numeric voice authorization code.



Unsuccessful SALE Transaction

If the credit card screen is still open, press the VOICE AUTH button. If the credit card screen is not open, select the order on the recall list and press the CREDIT button. Click cancel on the card swipe prompt and press the VOICE AUTH button. Enter the numeric voice authorization code received from the call center.

ORDER DETAILS

SWIPE CARD

KEYED ENTRY

DEBIT SALE

**VOICE AUTH**

SETTINGS

TRANSACTIONS

HELP

FINISHED

ENTER THE VOICE AUTHORIZATION CODE

IF THE PAYMENT PROCESSING NETWORK IS UNAVAILABLE, YOU CAN CALL A VOICE NUMBER FOR AN AUTHORIZATION. WHILE THIS VOICE AUTHORIZATION ASSURES YOU THAT THE CARD IS GOOD FOR THE AMOUNT REQUESTED, IT DOES NOT RECORD THE TRANSACTION FOR SETTLEMENT AND PAYMENT. THE VOICEAUTH TRANSACTION IS USED TO PLACE THE PREVIOUSLY VOICE AUTHORIZED TRANSACTION IN THE CURRENT BATCH SO THAT IT WILL BE SETTLED AND PAID.

123456

CANCEL

1 2 3

4 5 6

7 8 9

0

▶

**Voice Authorization Code Entry**

Enter the sale amount and press the green button to process the transaction.

The screenshot shows the 'ENTER THE VOICE AUTH CHARGE AMOUNT' screen. On the left is a vertical menu with options: ORDER DETAILS, SWIPE CARD, KEYED ENTRY, DEBIT SALE, VOICE AUTH (highlighted in red), SETTINGS, TRANSACTIONS, HELP, and FINISHED. The main area has a title bar, a large yellow display showing '\$8.02', a left arrow button, a CANCEL button, a numeric keypad (0-9), and a large green right arrow button (highlighted in yellow).

**Voice Authorization Amount**

An approved VOICE AUTH transaction is displayed with a green background. The auth code and authorized amount are included in the results for confirmation. An approved VOICE AUTH transaction is added to the batch and will be settled at the next scheduled batch settlement.

TRANSACTION RESULTS	
APPROVED	
PRINT RECEIPT	SIGNATURE SLIP
ADD TIP	
STATUS	APPROVED
CARD INFO	
AUTH CODE	VOICEAUTH 123456
ORDER NUMBER	27
CVV RESULT	
REFERENCE	0122
AMOUNT	\$8.02

Transaction Results

**ADD TIP**

The ADD TIP transaction type is used to add or adjust the tip amount on a previously processed SALE transaction. An incorrect tip amount can be corrected by running an additional ADD TIP transaction for the correct amount.

**ADD TIP**

ADD TIP

SELECT THE TRANSACTION TO ADD A GRATUITY OR USE THE NUMBERPAD TO ENTER THE TRANSACTION ID

**ENTER THE TRANSACTION ID**

CANCEL

1 2 3

4 5 6

7 8 9

0

**DEMO U #1**

CTROUTD	0
TRANS ID	1
STATION	1
SALE	\$5.04
VISA XXXXX 480	

**DEMO U #4**

CTROUTD	0
TRANS ID	2
STATION	1
SALE	\$3.07
VISA XXXXX 480	

**DEMO U #27**

CTROUTD	0
TRANS ID	3
STATION	1
SALE	\$8.02
XXXXX 480	

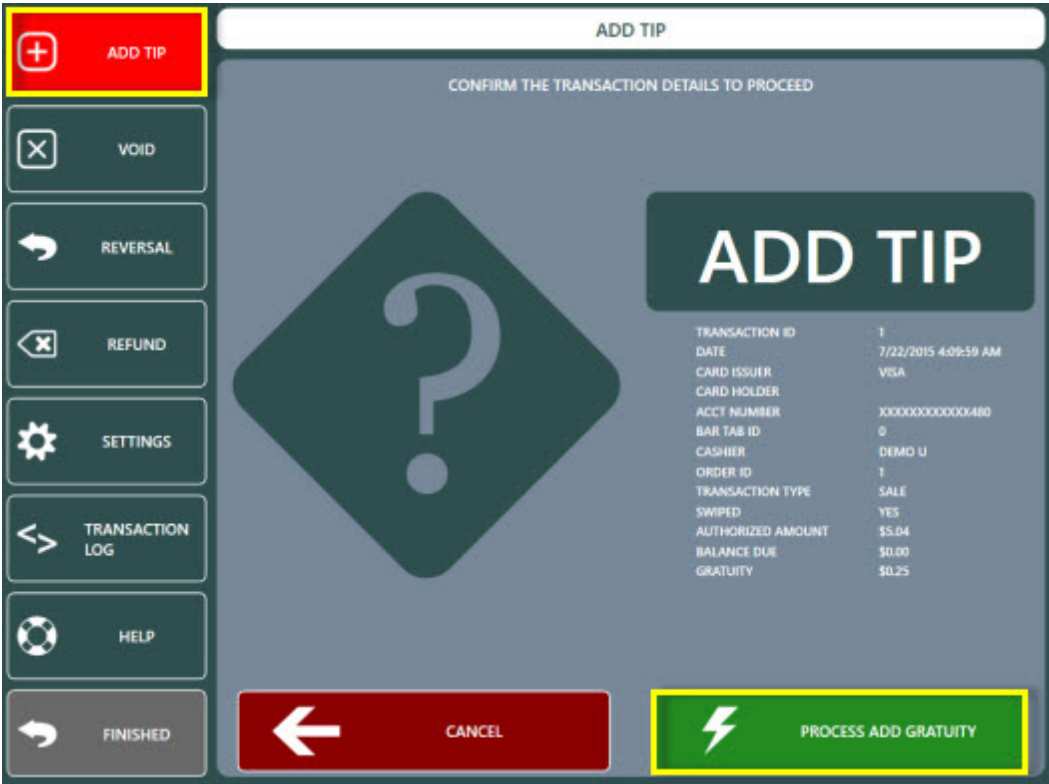
### Transactions List

Login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad.

The screenshot shows the 'ENTER THE GRATUITY AMOUNT' screen in the AmigoPOS 8 interface. On the left is a vertical menu with buttons: 'ADD TIP' (red with a plus icon), 'VOID' (dark blue with an 'X' icon), 'REVERSAL' (dark blue with a left arrow icon), 'REFUND' (dark blue with a left arrow and 'X' icon), 'SETTINGS' (dark blue with a gear icon), 'TRANSACTION LOG' (dark blue with a double arrow icon), 'HELP' (dark blue with a lifebuoy icon), and 'FINISHED' (dark blue with a right arrow icon). The main area has a title bar 'ENTER THE GRATUITY AMOUNT', a large yellow input field, a brown 'Previous' button (left arrow), a grey 'CANCEL' button, a numeric keypad (0-9), and a large green 'Next' button (right arrow) which is highlighted with a yellow border.

**Tip Amount Entry**

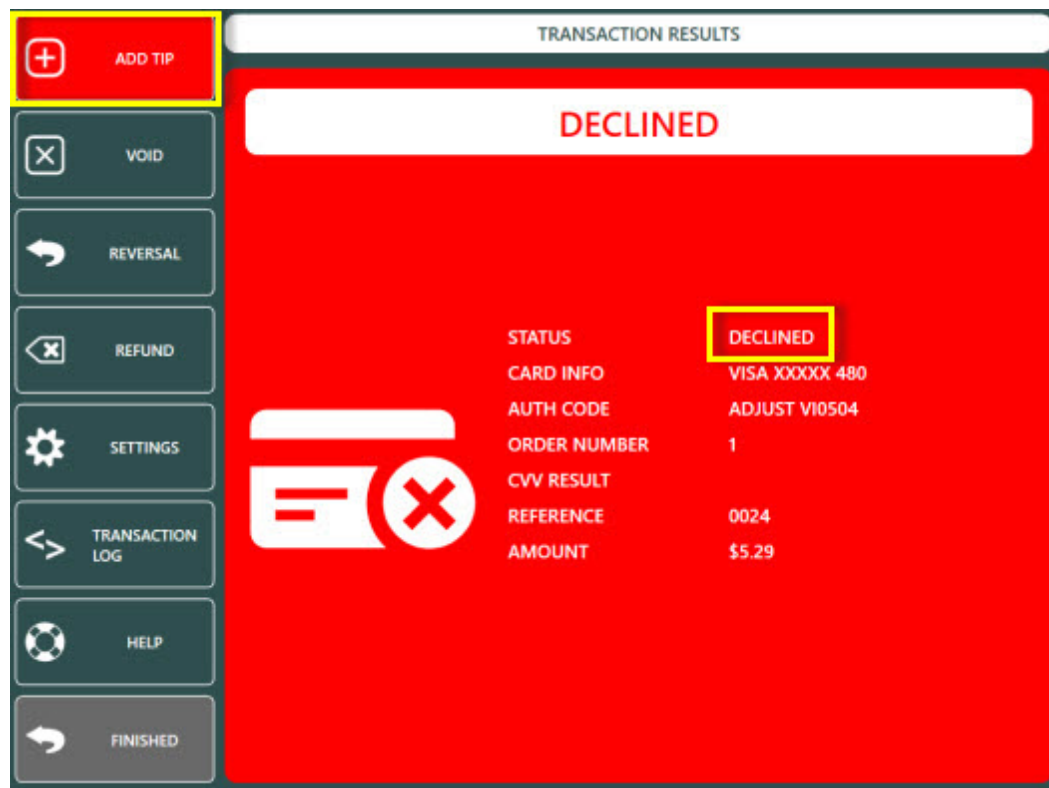
Review the transaction information shown on the confirmation screen and press the green button to process the transaction.



**Add Tip Confirmation**

A successful ADD TIP transaction is displayed with a green background. An unsuccessful ADD TIP transaction is displayed with a red background. In the example below, the ADD TIP transaction is declined because the SALE transaction was previously voided.






Transaction Results

**VOID**

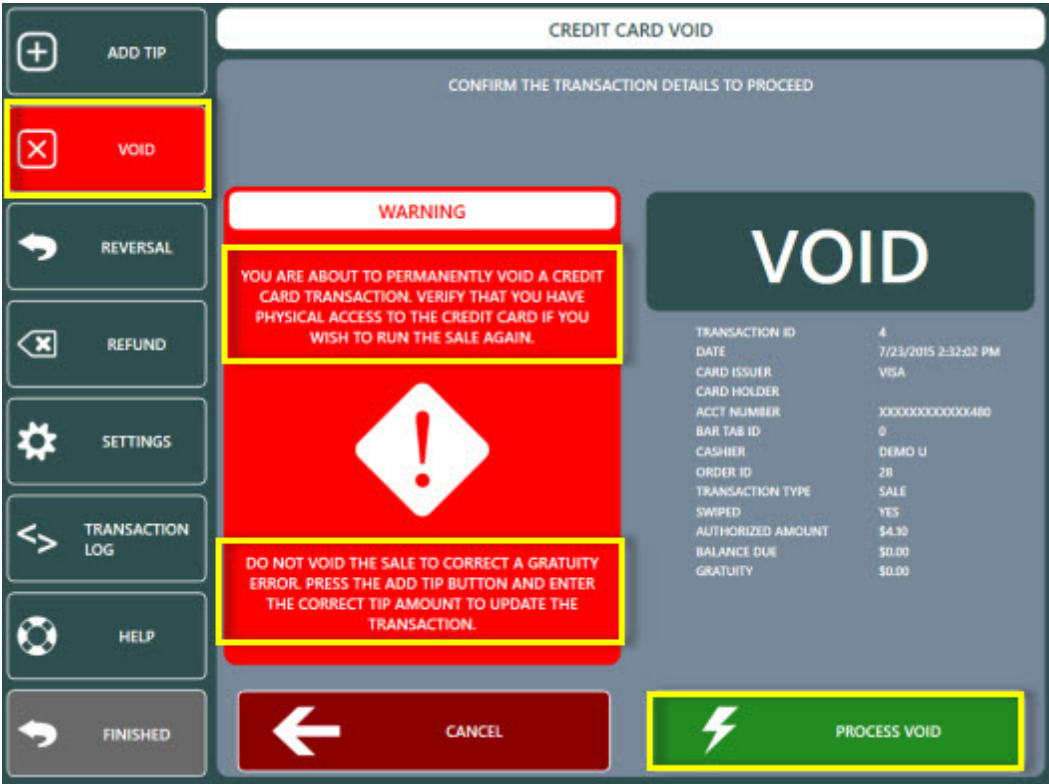
The VOID transaction type is used to void a previously completed sale (payment) transaction in the current batch on a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type).



**Warning: A credit card void is permanent and cannot be reversed**

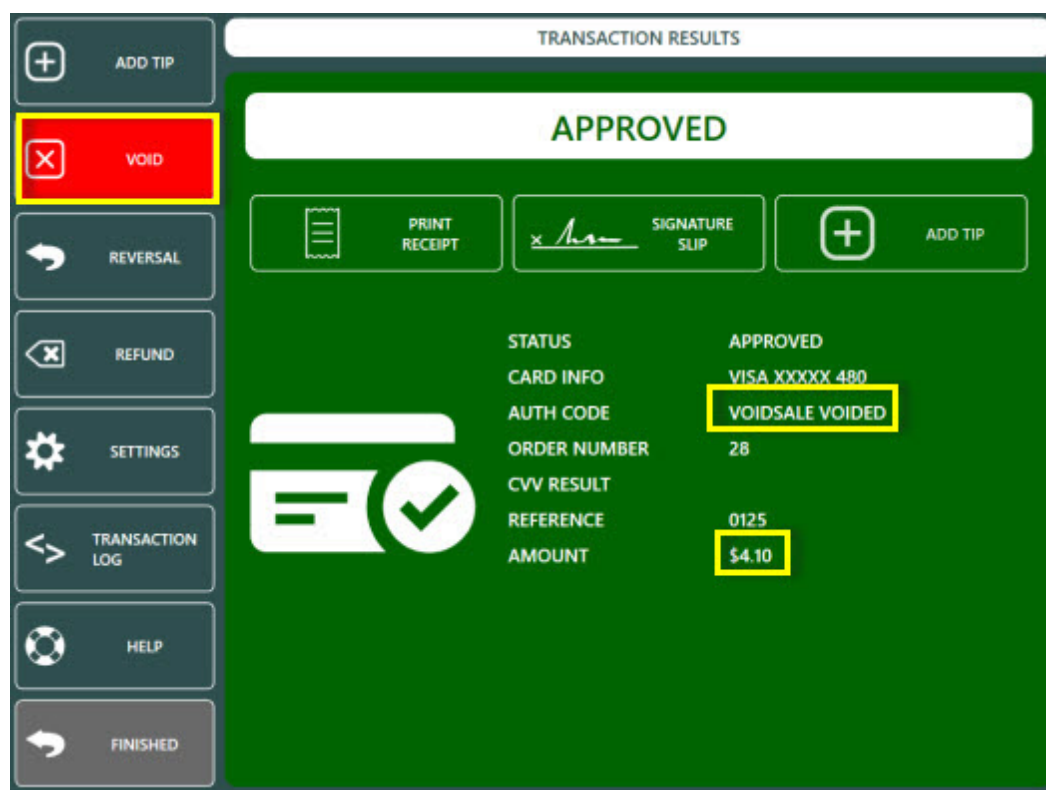
**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

Login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Press the VOID button and select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad. Review the transaction information shown on the confirmation screen and press the green button to process the VOID transaction.



**Void Confirmation**

A successful VOID transaction is displayed with a green background. An unsuccessful VOID transaction is displayed with a red background.



Transaction Results

**REFUND**

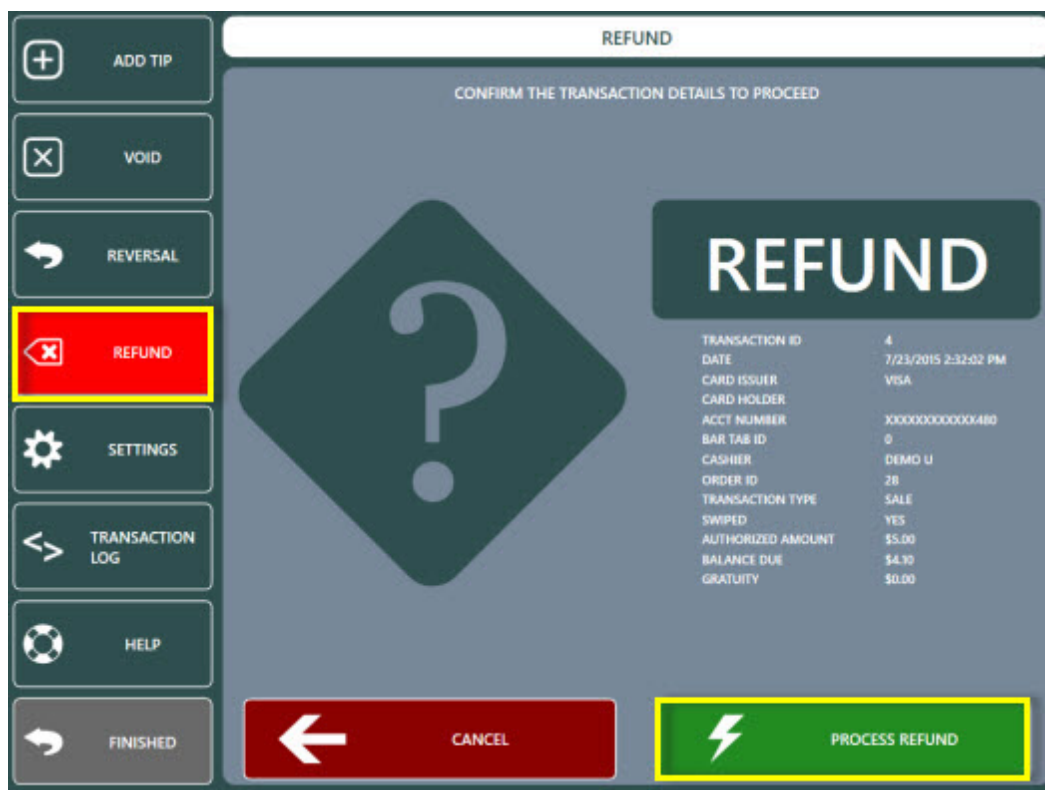
The REFUND transaction type is used to process a return (Mercury Pay and NETePay refer to a refund as a RETURN transaction) to a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Diner's Club, JCB or other supported card type).

To start a refund transaction, recall the order and press the CREDIT button. Click Cancel on the card swipe prompt and press the REFUND button to enter the refund amount using the on-screen number pad.

The screenshot shows the 'ENTER THE REFUND AMOUNT' screen in the Amigo Point Of Sale system. The interface includes a sidebar on the left with buttons for 'ADD TIP', 'VOID', 'REVERSAL', 'REFUND' (highlighted in red), 'SETTINGS', 'TRANSACTION LOG', 'HELP', and 'FINISHED'. The main area features a large yellow box displaying '\$5.00', a 'CANCEL' button, a numeric keypad (0-9), and a green 'NEXT' button (highlighted in green) at the bottom right.

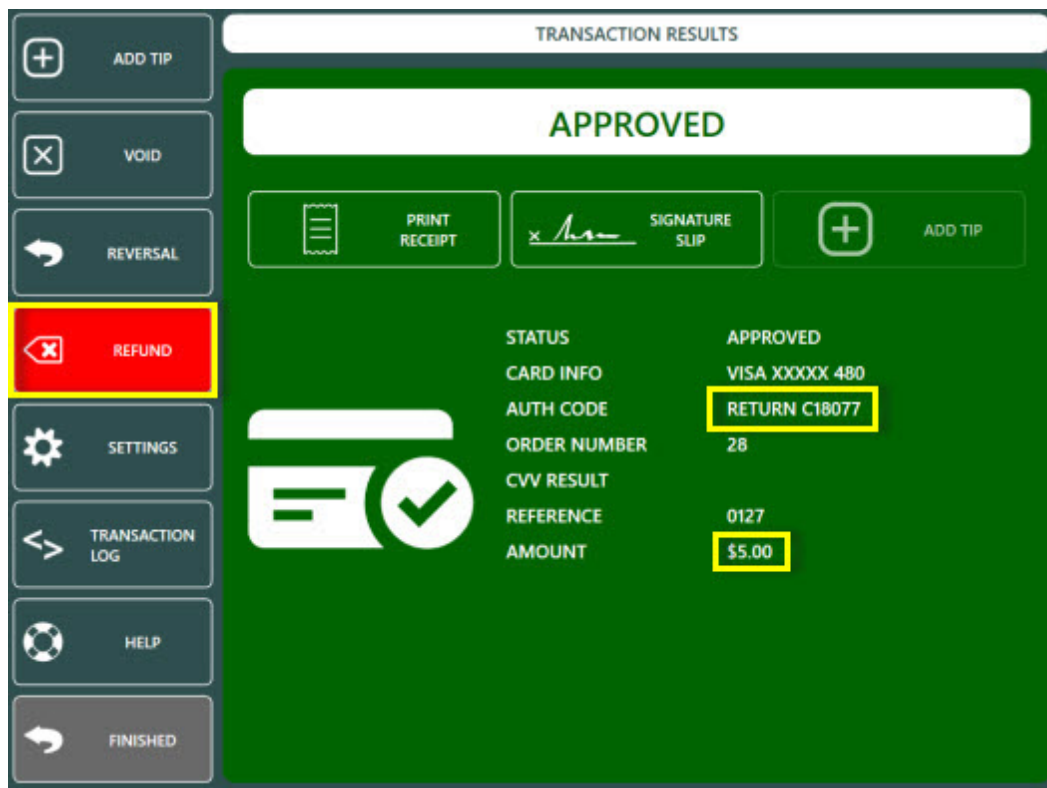
**Refund Amount Entry**

Review the transaction information shown on the confirmation screen and press the green button to process the REFUND transaction.



#### Refund Confirmation

A successful REFUND transaction is displayed with a green background. An unsuccessful REFUND transaction is displayed with a red background.



Transaction Results

**REVERSAL**

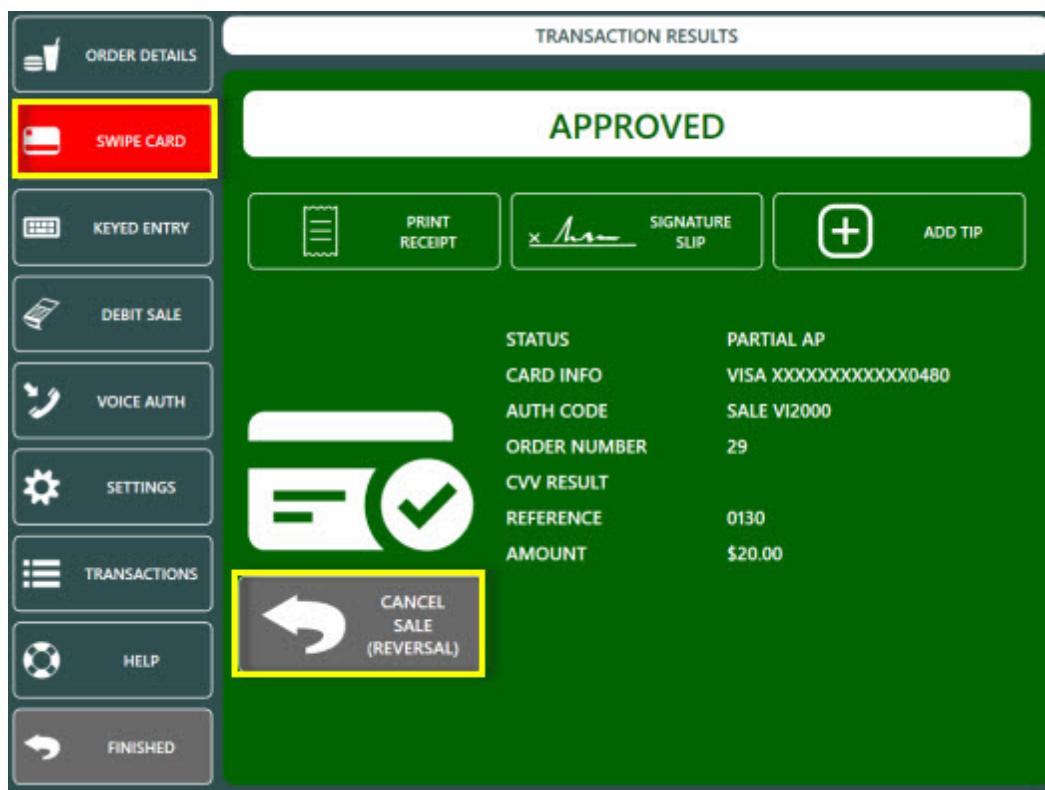
The REVERSAL transaction type is used to void a previous SALE transaction. REVERSAL differs from the VOID transaction type in that the funds are returned to the customer's card immediately upon a successful REVERSAL transaction. A VOID transaction will return the funds to the customer's card within 3-7 days. The REVERSAL transaction is available only for SALE transactions in the current batch.



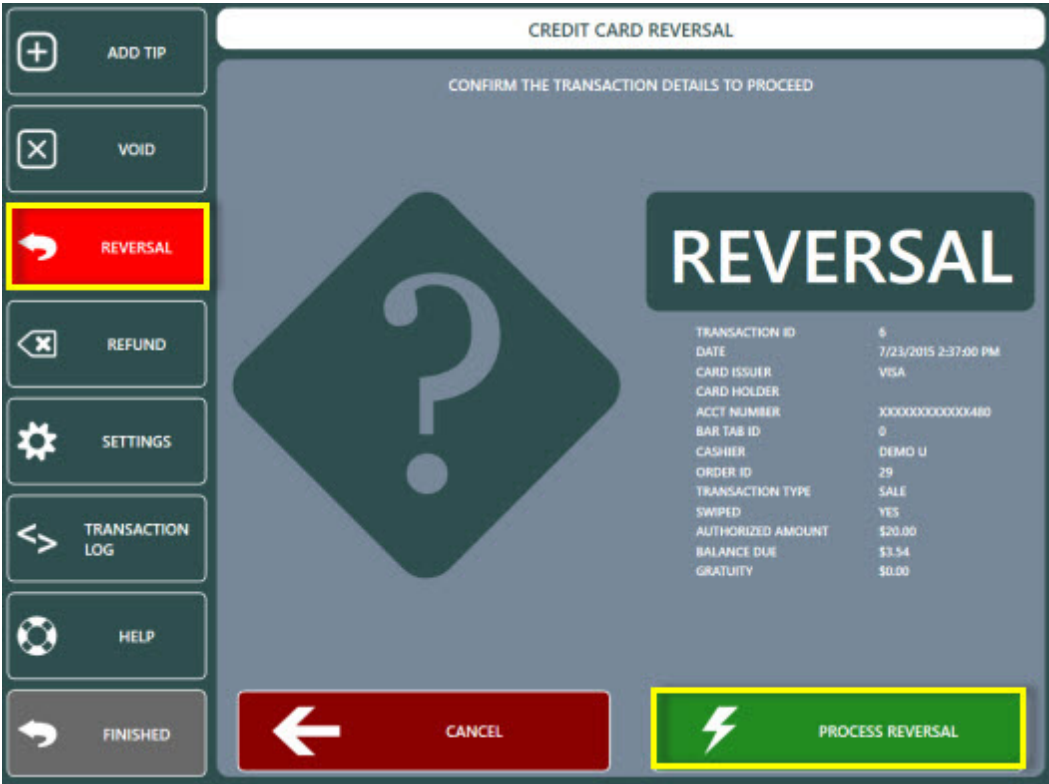
**Warning: A credit card void is permanent and cannot be reversed**

**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

A typical scenario for a REVERSAL transaction is when a prepaid card is authorized for a partial amount of the balance due and the customer wishes to use a different card. A successful SALE transaction displays the REVERSAL button on the results screen. If the credit card screen is not open, login to the POS and press the CREDIT CARDS button on the bottom right to display a list of eligible transactions. Press the REVERSAL button at the left and select the transaction or enter the transaction id (as shown on the signature slip) using the on-screen number pad.

**SALE Transaction Results**

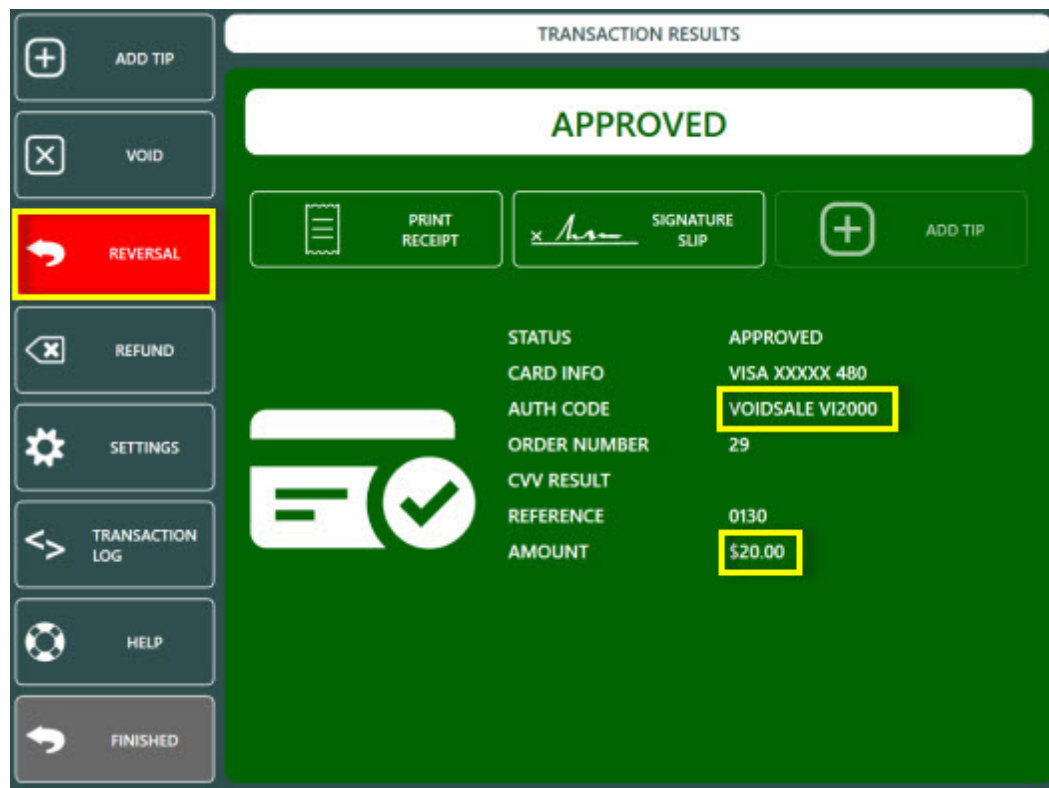
Review the transaction information shown on the confirmation screen and press the green button to process the REVERSAL transaction.



Reversal Confirmation

A successful REVERSAL transaction is displayed with a green background. An unsuccessful REVERSAL transaction is displayed with a red background.



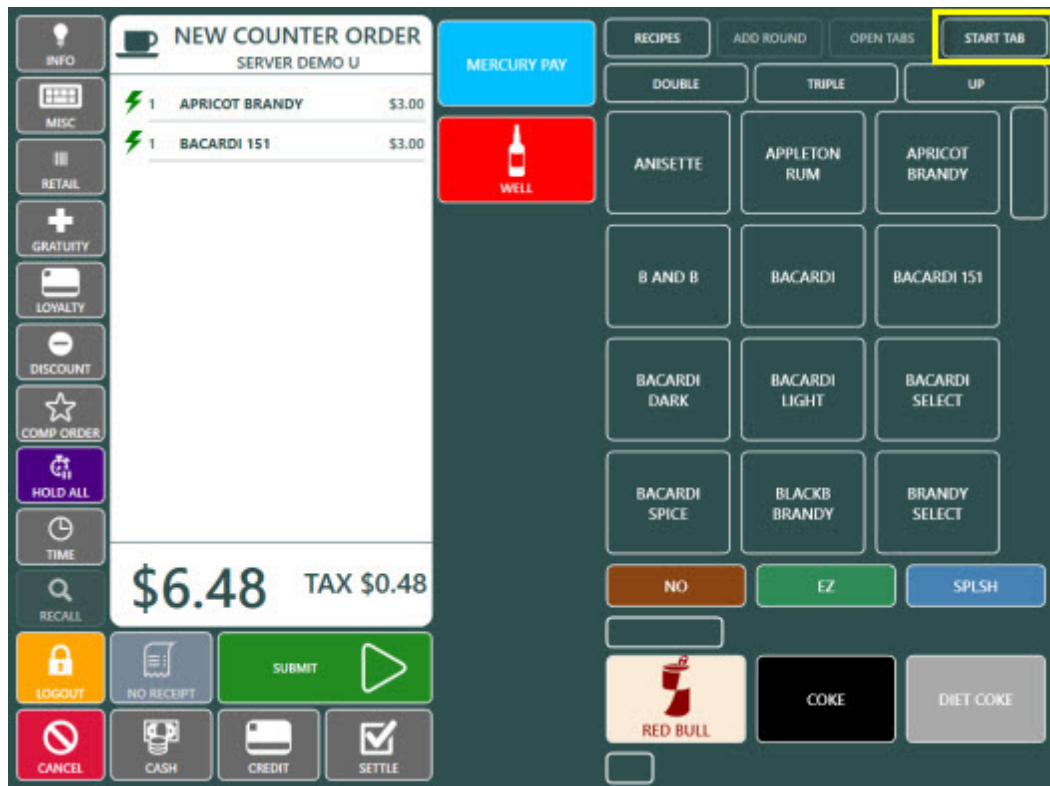


Transaction Results

**ZERO AUTH**

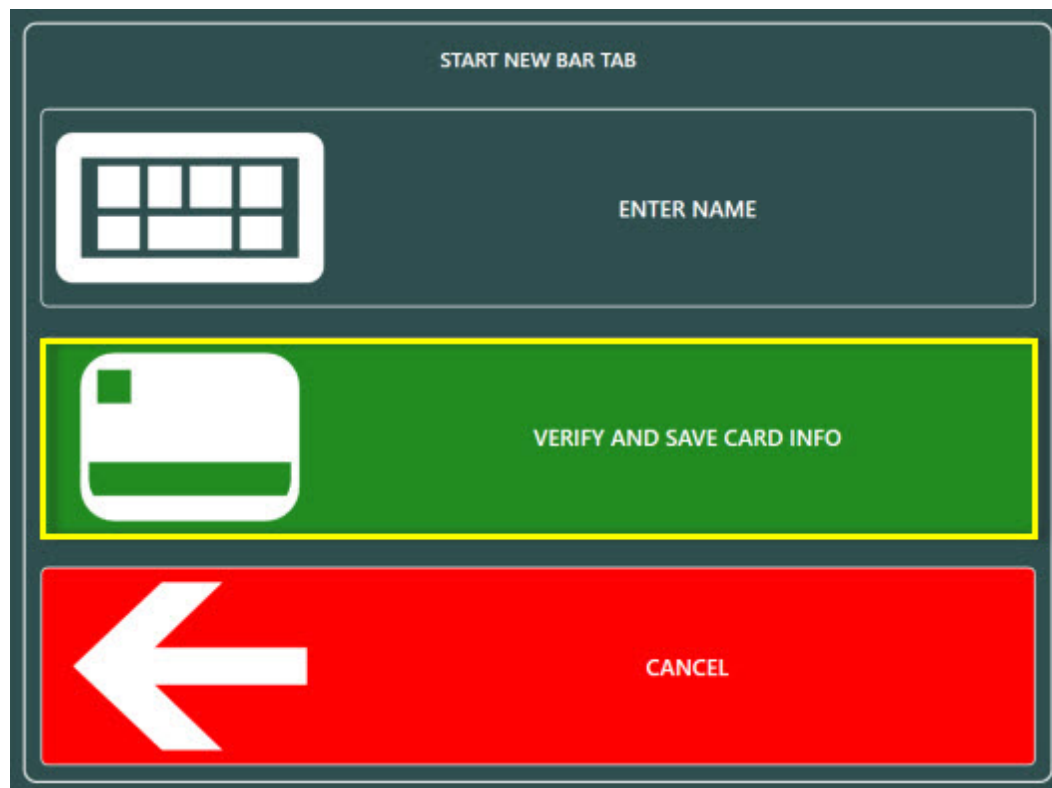
The ZERO AUTH transaction type is used to inquire whether a credit card is valid for processing without charging any amount. The POS uses the ZERO AUTH transaction only when starting a new bar tab and does not charge the customer's card but does store a token that is returned from the payment processor if the ZERO AUTH transaction is approved. The token is later used to process a SALE transaction for the balance due, and any subsequent adjustments such as adding a tip.

Start a bar order and press the START TAB button at the top left.

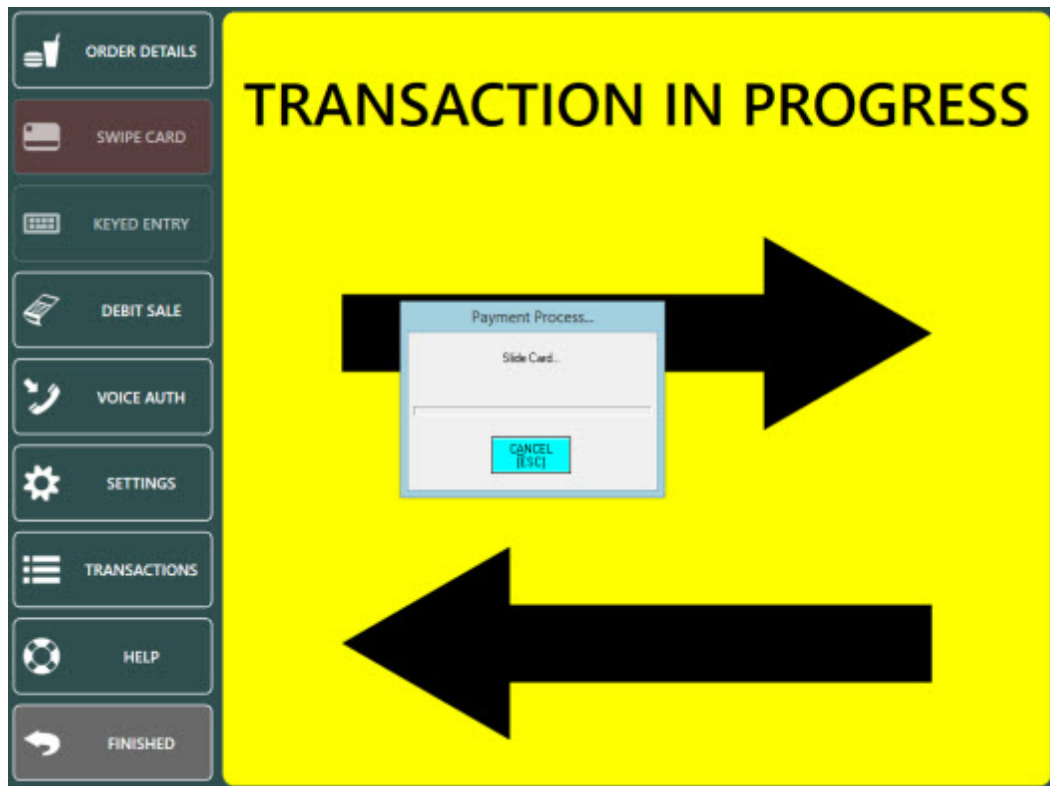


**Start Bar Tab**

Select VERIFY AND SAVE CARD INFO on the new bar tab screen.

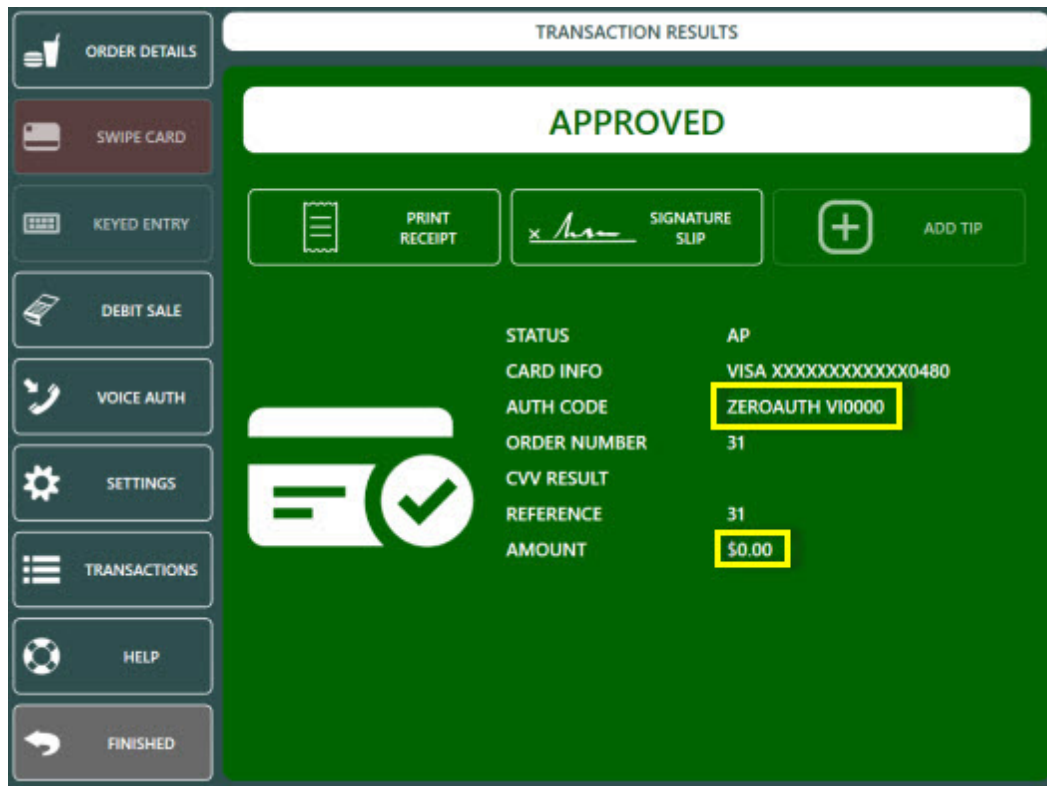
**Select Bar Tab Method**

Swipe the card to process the ZERO AUTH transaction. The transaction is canceled if the card is not swiped within 20 seconds.



**Card Swipe Prompt**

A successful ZERO AUTH transaction is displayed with a green background. An unsuccessful ZERO AUTH transaction is displayed with a red background.



Transaction Results

When the customer is ready to make payment, locate the order on the recall list and press the CAPTURE button.



Order Recall List

Review the transaction information shown on the confirmation screen and press the green button to process the SALE transaction.

**SETTLE BAR TAB**

CONFIRM THE TRANSACTION DETAILS TO PROCEED

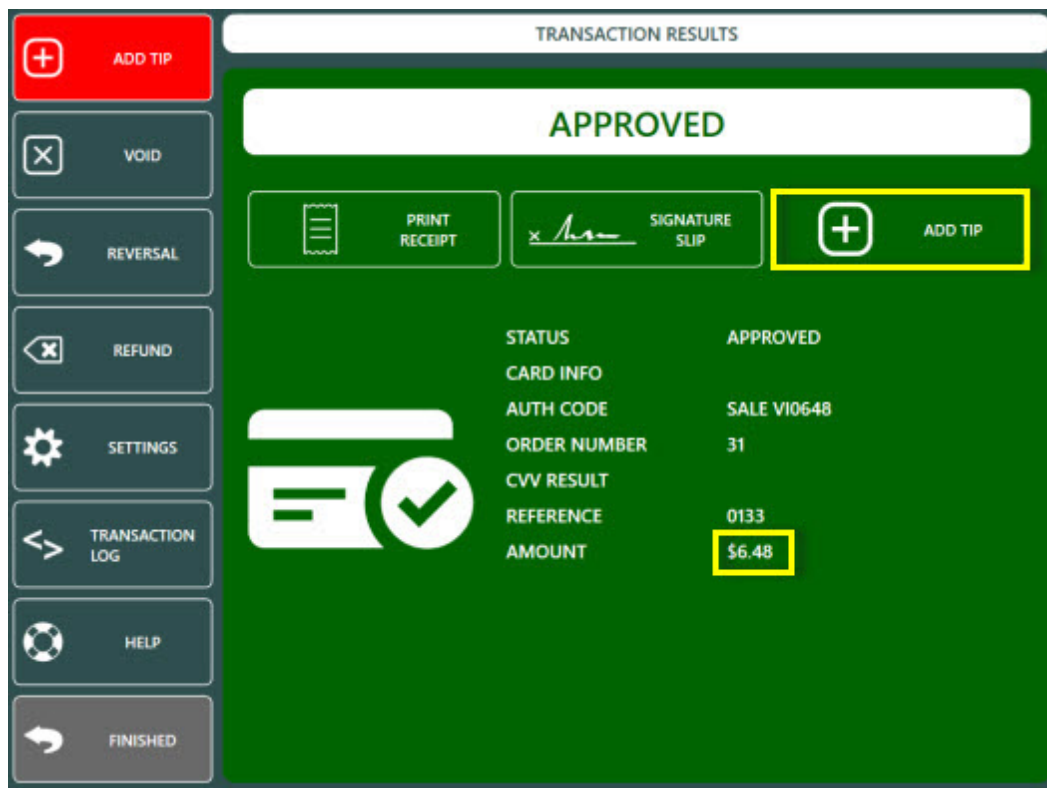
**SETTLE BAR TAB**

TRANSACTION ID	7
DATE	7/23/2015 2:48:07 PM
CARD ISSUER	VISA
CARD HOLDER	
ACCT NUMBER	XXXXXXXXXXXX480
BAR TAB ID	1
CASHIER	DEMO U
ORDER ID	31
TRANSACTION TYPE	
SWIPED	YES
AUTHORIZED AMOUNT	\$0.00
BALANCE DUE	\$6.48
GRATUITY	\$6.48

**CANCEL** **SETTLE BAR TAB**

#### Sale Transaction Confirmation

A successful SALE transaction is displayed with a green background. An unsuccessful SALE transaction is displayed with a red background. If the customer has specified a gratuity on the signature slip, press the ADD TIP button to adjust the SALE transaction.



Transaction Results

## 10.7.4 Troubleshooting

## 10.8 Verifone Point

### 10.8.1 Overview

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

# point.

#### End User Contact Information

Verifone  
800-725-9264

#### Reseller Contact Information

Verifone  
Renee Dickerson  
Inside Sales, Vertical Solutions Group  
Phone/Fax: (727) 288-9555  
[renee.dickerson@verifone.com](mailto:renee.dickerson@verifone.com)

Verifone Point offers easy setup (typically a few minutes per POS station), EMV ready, PCI compliant the ability to update credit card terminals remotely, acceptance of payments at the table using portable devices. Variable costs can be difficult for merchants to manage. Point eases this burden through a simple, fixed rate – per month, per solution. As a subscription service, Point also alleviates the need for up-front capital investment. The service includes 24x7 support, encrypted gateway transactions, integration for new methods of payment, ongoing EMV maintenance and merchant support and full PCI compliance. For merchants and partners alike, Point offers a wide variety of hardware, software and services tailored to the individual needs of a merchant. There are a number of options for what to deploy and how to pay, with the ability to upgrade at any time as new technologies become available.

A few of the advantages that Verifone Point offers over other solutions:

- No cashier passwords or other complex credentials to remember
- All cardholder data is encrypted at the device and never transmitted to the POS
- Built-in EMV (Europay, MasterCard and Visa) compliance. EMV is the standard for cards equipped with computer chips and the technology used to authenticate chip-card transactions and required after October 2015
- Easy back office setup by entering the device IP address
- Table-side payments with the portable Wi-Fi enabled battery operated [Verifone Vx 680](#)
- Choose your preferred payment processor
- Web portal with complete transaction history and reports
- Advanced payment options such as emerging payments and mobile wallets

The following description is taken from the Verifone Point documentation:

#### **Payment Simplicity**

Point takes the guesswork and complexity out of managing multiple payments and payment technologies, while adhering to security and compliance standards and helping merchants prepare for EMV. As a managed-payments solution, Point gives merchants a competitive edge by empowering them to focus on their core business while giving them the flexibility to define and deliver the payment experience that best meets consumer expectations. ISV's, resellers and other service providers benefit from a turnkey, value-added payment solution that complements their existing managed service offerings while taking the complexity of payments off of their shoulders.

#### **Flexible Service**

Variable costs can be difficult for merchants to manage. Point eases this burden through a simple, fixed rate – per month, per solution. As a subscription service, Point also alleviates the need for up-front capital investment. The service includes 24x7 support, encrypted gateway transactions, integration for new methods of payment, ongoing EMV maintenance and merchant support and full PCI compliance. For merchants and partners alike, Point offers a wide variety of hardware, software and services tailored to the individual needs of a merchant. There are a number of options for what to deploy and how to pay, with the ability to upgrade at any time as new technologies become available.

#### **Speed of Innovation**

Consumers have increasingly sophisticated expectations of payments, and of merchants, as new technologies evolve. Designed to future proof the consumer experience, Point accommodates emerging methods of payment, loyalty and rewards, so merchants can keep pace with the latest trends and stay forever current. ISV's, resellers and other service providers can also leverage Point to address payment complexities, while driving greater value and competitive differentiation into their core products and services. Point grows in lockstep with the market, ensuring that merchants and service providers are always up to date with the latest payment technologies.

#### **Ease of Integration**

Point provides robust integration that moves payment logic from the POS to the payment device, which significantly reduces the scope and burden of maintaining PCI compliance and simplifies the migration to EMV. Verifone devices securely manage all card data to and from the gateway, communicating to the POS through a standards-based messaging protocol. With this approach, payment innovation evolves freely and without significant dependencies on the POS software.

#### **One Solution to Simplify Payments**

For those seeking relief from integrating today's increasingly complex payment technologies, Point has the answer.

It's one solution for all the hardware, software and services needed to simplify payment complexities, strengthen core



offerings and drive deeper relationships with consumers. Regardless of the immediate need – emerging payments, mobile wallets, loyalty, rewards or EMV – look to Point. Period. It's all you need to stay competitive.

## 10.8.2 Devices

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

As of this writing (February 20, 2015), AmigoPOS 8 supports payment processing through Verifone **V\*** series devices. **M\*** series devices will be supported in the future, but currently do not support Sale/Add Tip and correcting gratuity mistakes is difficult.

### Interface

Devices should be ordered with an Ethernet interface, with the exception of the portable **V\*** 680 (WF/BT), which should be ordered with the Wi-Fi interface. Note that AmigoPOS does not use bluetooth to communicate with the device.

### IP and Port

Devices should be set to use a static IP address so that the IP address does not change in the event of power outage or router reboot. When the device is rebooted, select Static IP. Note that many network routers offer the option to reserve the IP address so that the IP address is not assigned to another network device if the Verifone is offline for an extended period.

The default network port for all Verifone devices is 5015. The port does not have to be changed unless instructed to do so by Verifone technical support.

### Customer Prompts

The Verifone payment terminal can be ordered with the option to prompt the customer for a phone number, email or loyalty card. AmigoPOS will store these values when present

## 10.8.3 Setup

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

Contact Verifone or your merchant account provider to set up Verifone Point to work with your existing merchant account or to obtain a new merchant account and to obtain compatible **V\*** series devices. Verify that both the payment processor and the **V\*** series device supports the [transaction methods](#)<sup>[467]</sup> that your business requires. Note that **M\*** series devices are not currently supported when using PreAuth/Capture because it is not possible to adjust an incorrect gratuity amount.

### End User Contact Information

Verifone  
800-725-9264

### Reseller Contact Information

Verifone  
Renee Dickerson  
Inside Sales, Vertical Solutions Group  
Phone/Fax: (727) 288-9555  
[renee.dickerson@verifone.com](mailto:renee.dickerson@verifone.com)

### Device Settings

Connect the device to the network router using a standard CAT5/6 patch cable. Each device offers the option of using a static IP address or DHCP to obtain an IP address from the router. A static IP address is strongly preferred so that the IP address remains unchanged in the event of a power outage or if the router or device is rebooted.

**Back Office Settings**

Complete the following steps only after obtaining the devices from Verifone or your merchant account provider

**Credit Card Settings**

**Verifone point.**

General Settings	
*Interface	Verifone Point
*Device IP Address	192.168.1.13
*Device Port	5015
Transaction Options (apply to this station only)	
*Transaction Method	Sale/Add Tip
*Override Duplicate	No
*Print Signature Slips	Yes
*Disable Print Gratuity Line	No
*Disable Print Signature Line	Yes
*Print Copies	No Copies
Signature Slip Settings (apply to all pos stations)	
Signature Slip Disclaimer 1	I agree to pay the above total according
Signature Slip Disclaimer 2	to the card issuer agreement
Signature Slip Disclaimer 3	
Signature Line Minimum	0
Require Manual Credit Auth Code	No
Signature Slip Bar Tab Name	Yes
<b>*Interface</b> Select the credit card processing method at this station	

Back Office/Settings/Credit Cards

## 10.8.4 Payment Types

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

The transaction types described below are supported as of this writing (February 8, 2015). Note that the transaction methods described below are available only on **V<sup>x</sup>** series devices.

**Note for PCCharge Payment Server Users**

Restaurants that currently use PCCharge Payment Server to process credit card transactions through AmigoPOS have the option of selecting Sale/Add Gratuity or Pre-Auth/Capture transaction. A sale transaction is added to the current batch immediately upon approval. A gratuity can be added to a sale transaction when necessary, but is not required.

In contrast, a Pre-Auth transaction must always be captured to be added to the current batch, even when the gratuity amount is zero. The corresponding transaction types in Verifone Point are Sale/Add Tip and Open Tab/Close Tab (only when using a **V\*** series device).

#### Note on **M\*** device support

Check future releases for **M\*** device support. Currently **M\*** devices do not support correcting gratuity amounts when a pre-auth is captured incorrectly, rendering the Authorize/Capture transaction methods unusable for restaurants that accept gratuities.

#### Sale/Add Tip vs Open Tab/Close Tab

The recommended transaction type for most restaurants is Sale/Add Tip. A Sale is added to the batch immediately, and a tip is added only when required. If an incorrect tip amount is added to a sale transaction, the tip amount can be updated simply by running a new Add Tip transaction with the correct amount.

An additional difference between the Sale/Add Tip and Open Tab/Close Tab is as follows:









- Sale/Add Tip: the device will prompt for confirmation of the payment amount when the card is swiped but not when the tip is added
- Open Tab/Close Tab: : the device will prompt for confirmation of the payment amount when the tab is closed but not when the tab is opened

#### Bar Tabs

A pre-authorized bar tabs are processed using the Open Tab/Close Tab transaction type. If a bar tab is closed with an incorrect tip amount, it can be closed again with the correct tip amount.

#### Available Transaction Types

The following transaction types are available when using Verifone Point with a **V\*** series device. Note that some transaction types may not be available depending on the payment processor and specific **V\*** device.

- [Sale](#) 
- [Refund](#) 
- [Void](#) 
- [Add Tip](#) 
- [Reset Tip](#) 
- [Open Tab](#) 
- [Close Tab](#) 
- [Delete Tab](#) 

#### Sale

The SALE transaction type is referred to as a CAPTURE in Verifone Point documentation and reports. The SALE is a transaction that is added to the batch immediately upon approval. A gratuity can be added, but is not required.

#### Refund

A REFUND transaction is referred to as a CREDIT in Verifone Point documentation and reports. The REFUND is a transaction that is used to return funds to a cardholder's account.

#### Void

This command voids a previous transaction. Often the authorization code is also reversed. When using FDMS Nashville processor, a Void cannot be issued 25 minutes after the original Sale transaction. When that amount of time has transpired, you must process the transaction as a Credit (Return). When using Vantiv processor in an SCA 'direct to processor' implementation, the CTROUTD is stored only for the day – after that amount of time has transpired, you must process the transaction as a Credit (Return) with the card token.

#### Add Tip

This command adds tip or modifies tip on an existing CAPTURE transaction.<sup>2</sup> Add Tip will overwrite any previous tip amount. Implementation of ADD\_TIP on existing CAPTURE transactions varies by processor. The Add Tip transaction is not supported by First Data Nashville ISO.

**Reset Tip**

This command removes tip from a specific transaction. The Reset Tip transaction is not supported by First Data Nashville ISO. To support restaurant tipping on Nashville ISO, run as a separate transaction or run a Sale for the total amount (including tip) rather than a tip-adjusted transaction.

**Open Tab**

This command opens a customer tab by performing a pre-authorization to PWC and returning the transaction IDs to the server.

**Close Tab**







This command closes a customer tab by performing a completion to PWC using an existing CTROUTD.

**Delete Tab**

This command deletes an existing Tab by Voiding/Reversing the original transaction.

## 10.8.5 POS Usage

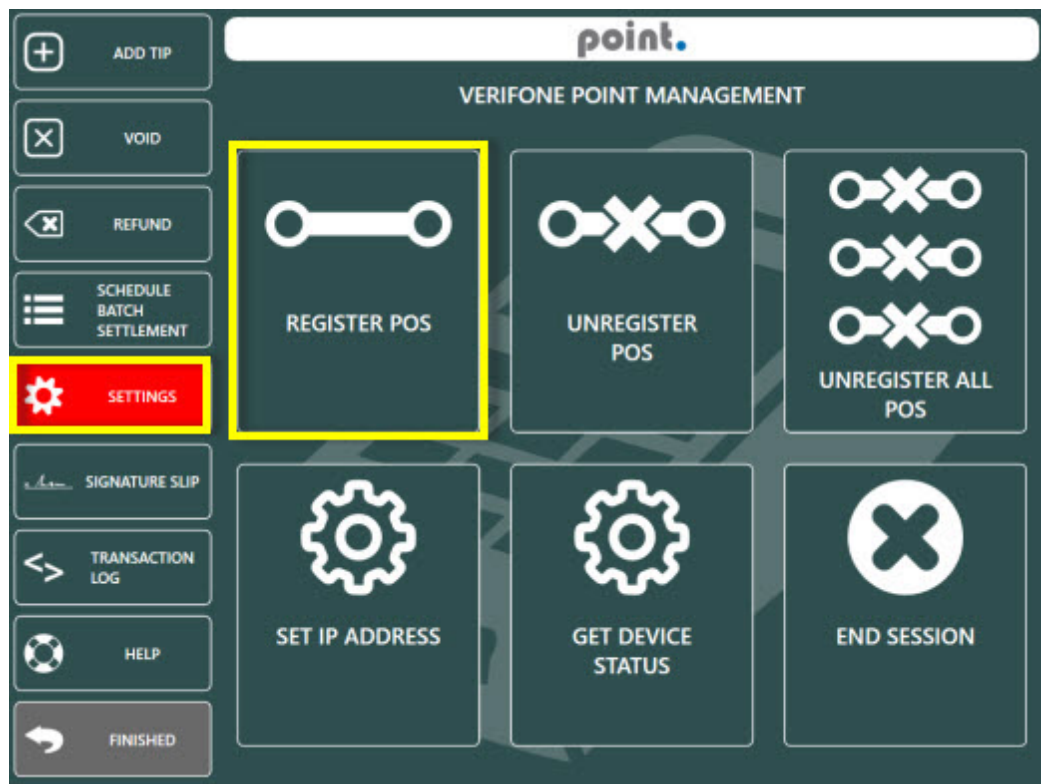
Review the following topics for an introduction to processing credit card transaction through Verifone Point. Note that some transaction types may be unavailable depending on the payment processor and device.

- [Start a transaction](#) 
- [Process Sale/Open Tab](#) 
- [Add a tip or close a tab](#) 
- [Correcting Mistakes](#) 
- [Void a transaction](#) 
- [Refund a transaction](#) 

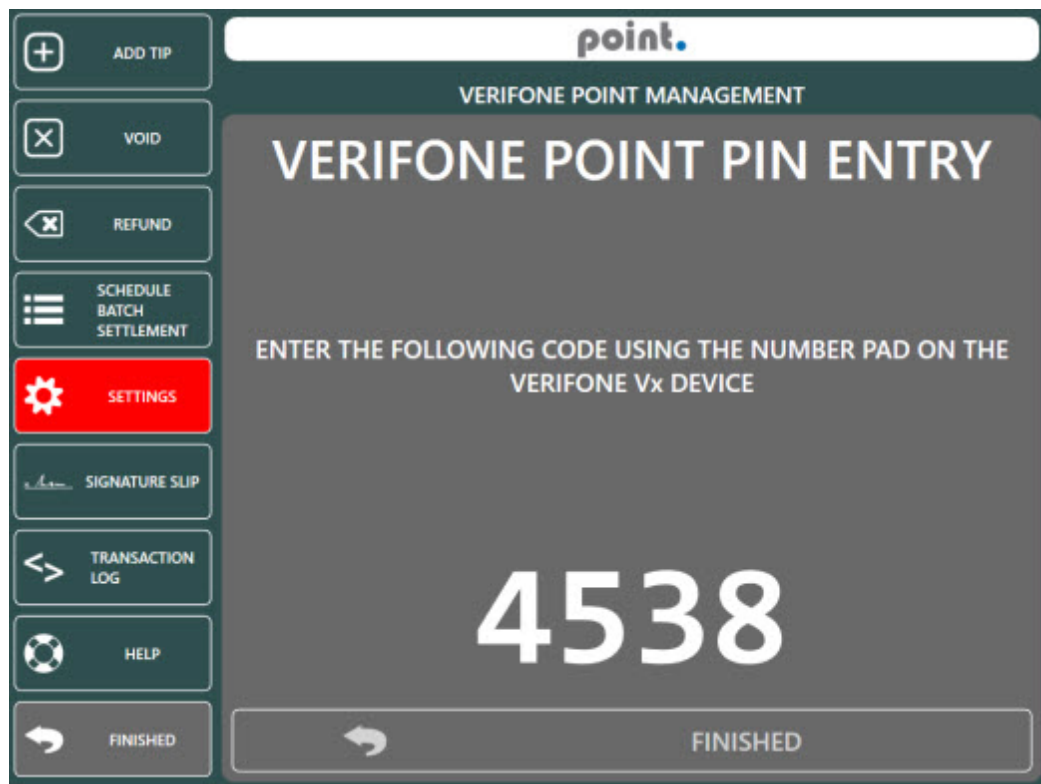
### 10.8.5.1 Device Pairing

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

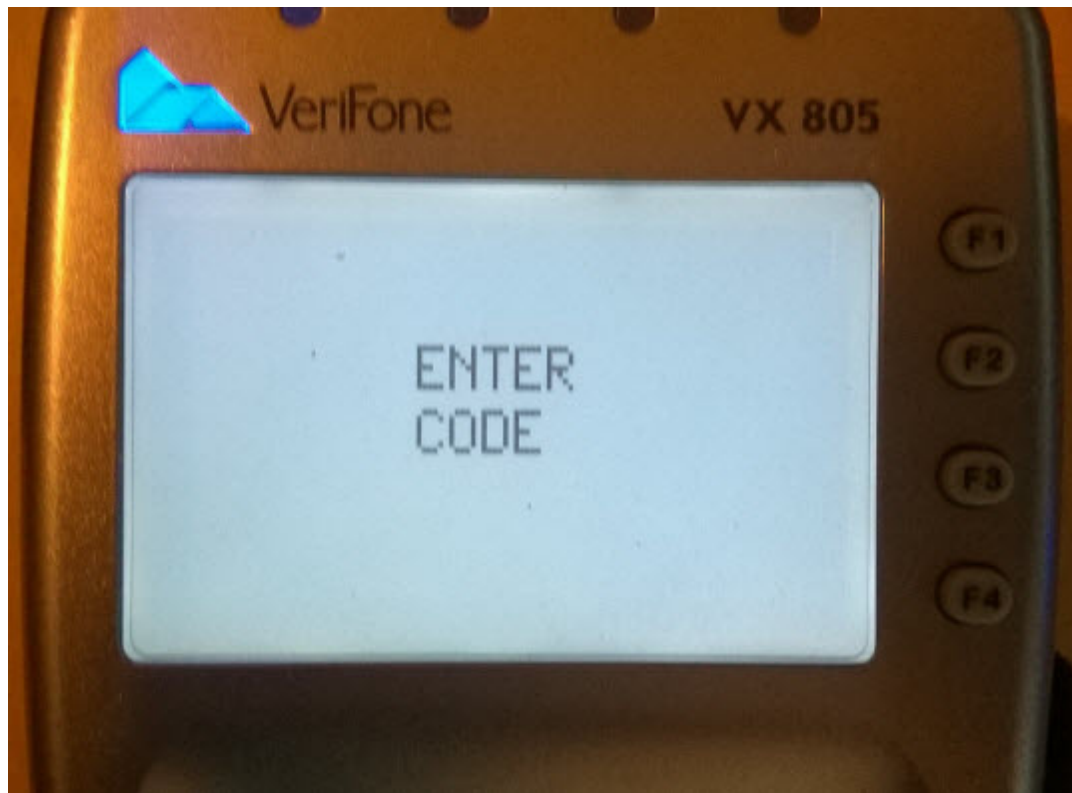
The pos station must be paired with the Verifone Point device before attempting to process a credit or gift card transaction.

**Credit Cards Screen**

Open the credit cards screen and select SETTINGS/REGISTER POS. AmigoPOS generates a random PIN that can be used to register the pos with the device.

**Device Pairing**

Enter the PIN using the device number pad and press the green button on the device.



**Pin Entry Prompt**

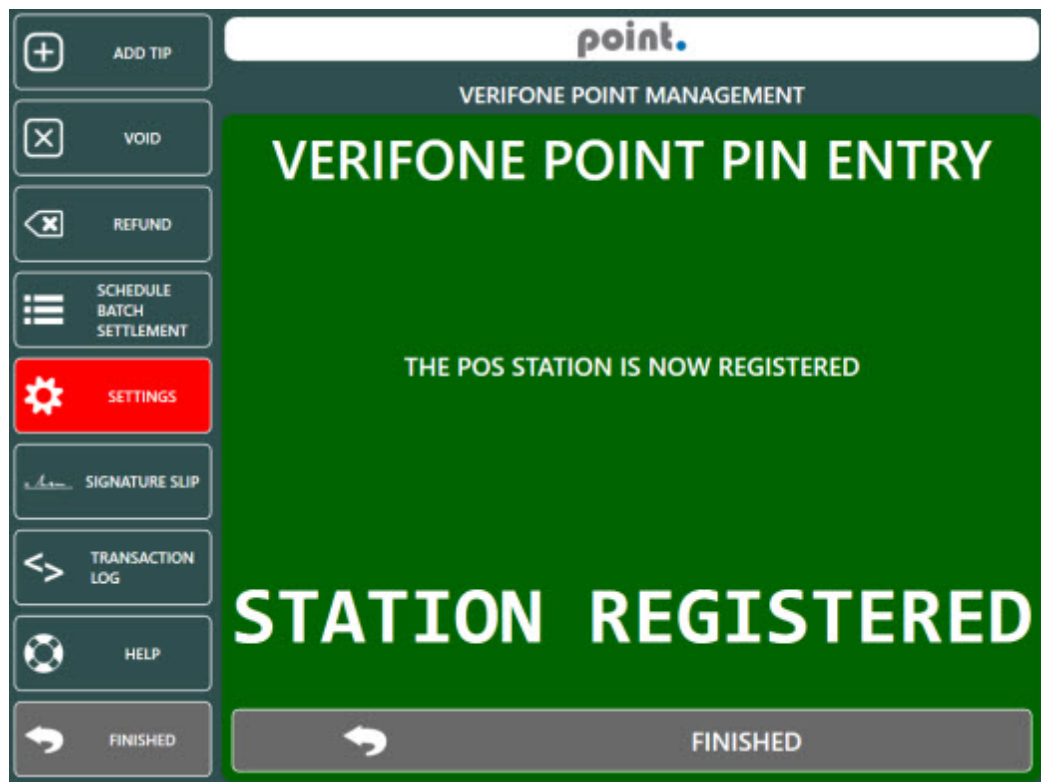
The device screen will display a confirmation that the PIN was entered correctly.



**Pin Entry Results**

AmigoPOS will display the results screen with a green background to indicate that the pos and device are successfully paired.





Device Pairing Confirmation

### 10.8.5.2 Start Transaction

A credit card transaction can be started from the following screens:

- [Order Entry Screen](#) <sup>[474]</sup>
- [Recall List](#) <sup>[475]</sup>
- [Settle Screen](#) <sup>[476]</sup>

#### Order Entry Screen

Start a new order or recall an existing order and press the Credit button on the bottom left to start the transaction. The Credit button may be disabled or hidden if the logged in user does not have the [Allow Credit Card Sale](#) <sup>[699]</sup> permission enabled, the [Order Entry Screen Credit Button](#) <sup>[955]</sup> setting is disabled or the credit card payment type enabled setting is overridden at the pos station on the [local payment type](#) <sup>[963]</sup> settings grid.



Order Entry Screen

**Order Recall List**

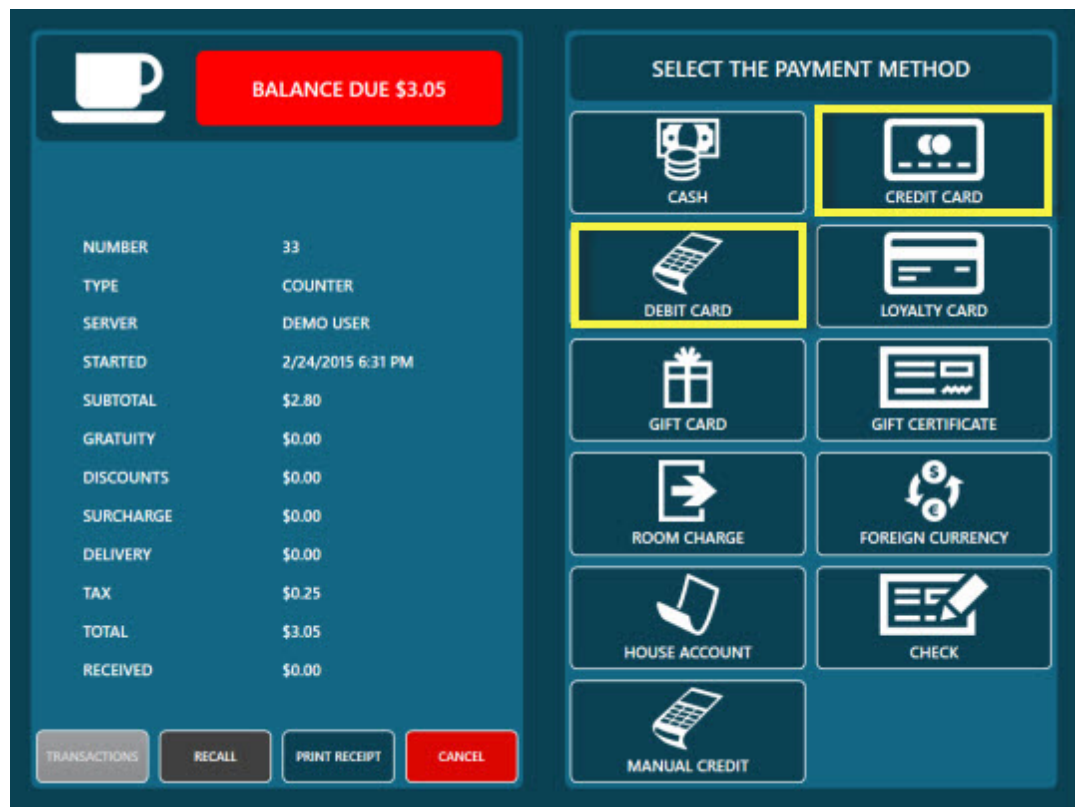
Login to AmigoPOS and press the downward facing arrow on any order to expand and press the Credit button. The Credit button may be disabled or hidden if the logged in user does not have the [Allow Credit Card Sale](#)<sup>[695]</sup> permission enabled or the credit card payment type enabled setting is overridden at the pos station on the [local payment type](#)<sup>[965]</sup> settings grid.



Order Recall List

**Settle Screen**

Press the Settle button on the order entry screen or recall list and select the Credit Card or Debit Card payment method. Either payment method may be disabled or hidden if depending on the settle screen [payment methods](#)<sup>[962]</sup> or [local payment methods](#)<sup>[963]</sup> settings.

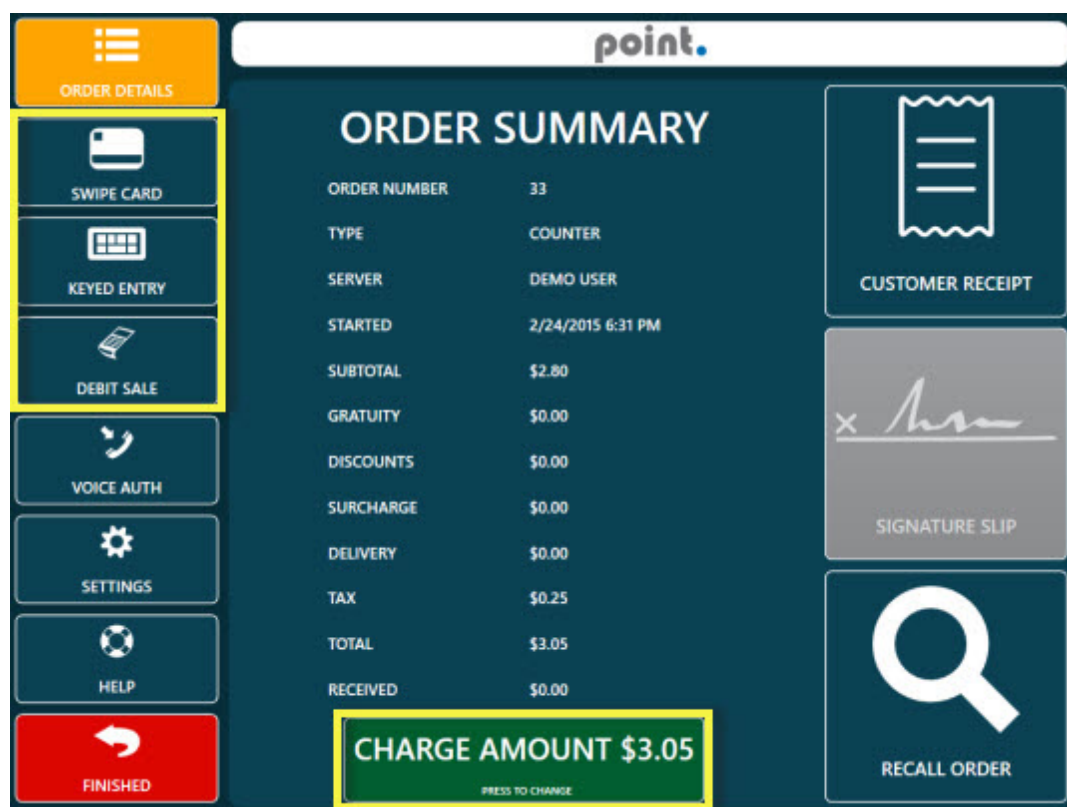


Settle Screen

### 10.8.5.3 Process Sale/Open Tab

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

Select a payment method on the left to send the transaction request to the V<sup>x</sup> device. Note that Debit Sale is not available for bar tabs. The keyed entry method should be used only the card cannot be read by the V<sup>x</sup> device or if the card is not present. Note that the charge amount can be changed by pressing the green button on the order summary screen.



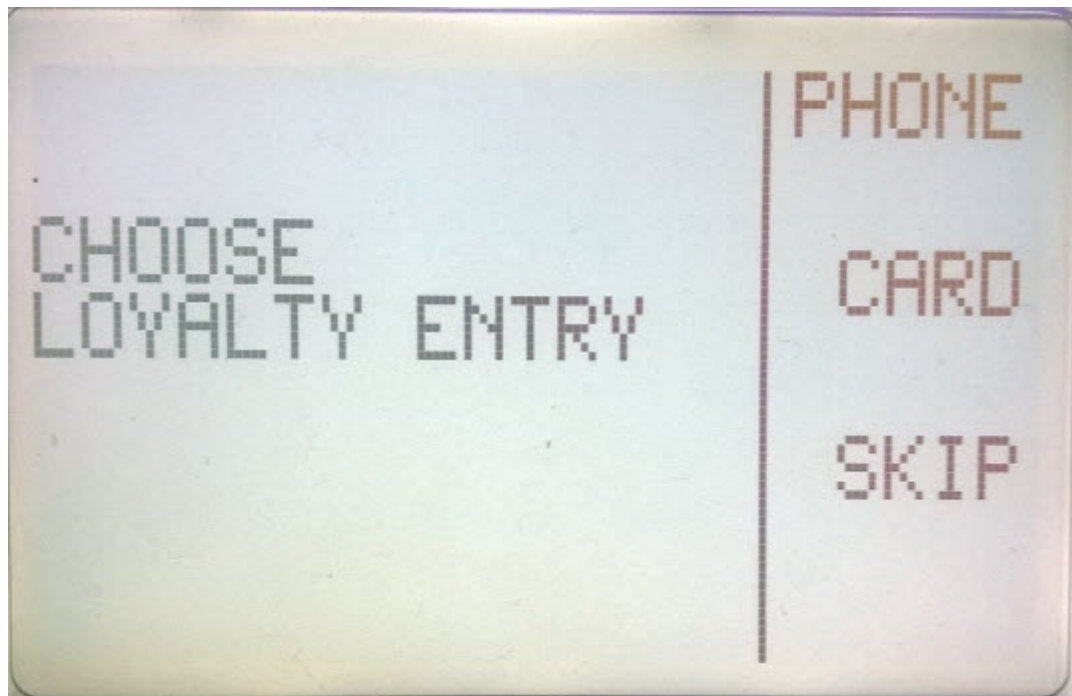
#### Credit Card Transaction Screen

The pos screen will remain locked and not respond to user input while awaiting a response from the V<sup>x</sup> device. To cancel the transaction, press the red button at the bottom left of the V<sup>x</sup> device.



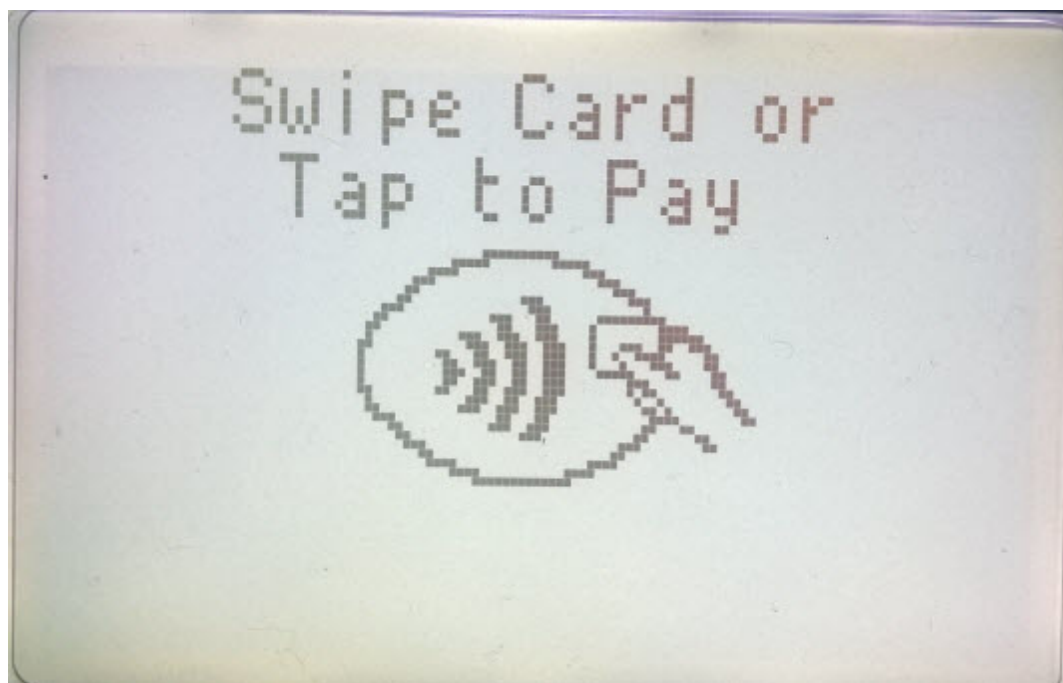
**Waiting for response from Vx device**

When using the [Sale/Add Tip](#) <sup>467</sup> method, the loyalty card prompt will appear if the device is set to prompt for loyalty card input. If phone number is not entered or a loyalty card is not swiped, the loyalty card prompt will timeout in approximately 60 seconds and the card swipe prompt is displayed.



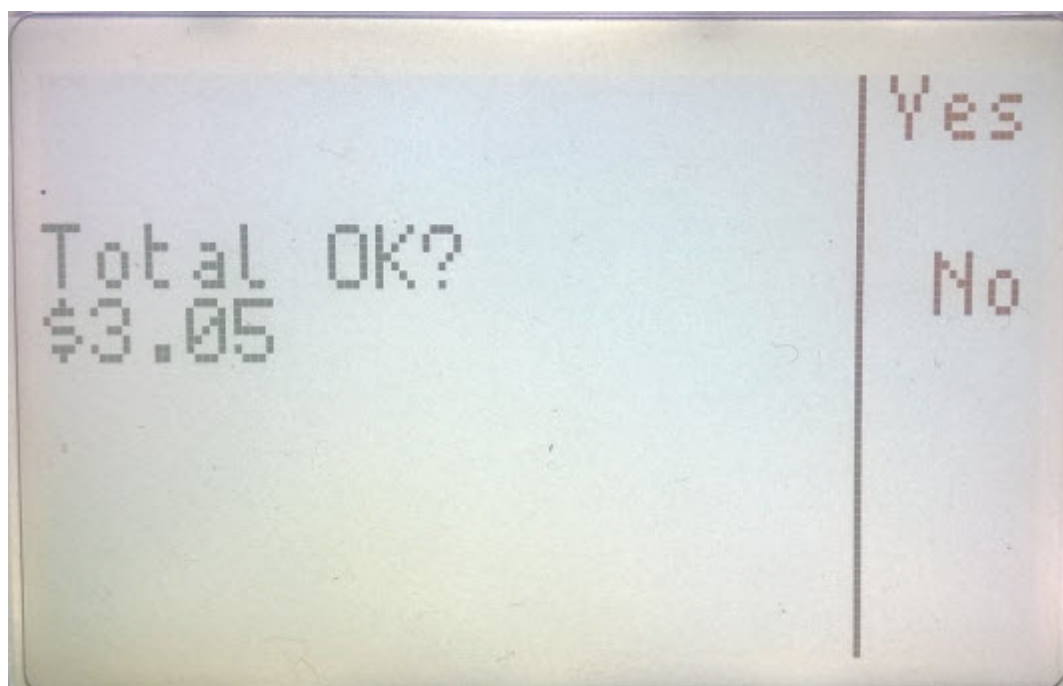
**Loyalty Prompt**

The card swipe prompt is displayed for approximately 90 seconds before timing out. If a card is not swiped, tapped or read within the timeout period, the transaction is automatically canceled.



**Card Swipe Prompt**

The total amount confirmation prompt is displayed when using the Sale/Add Tip method. If No is selected or Yes is not selected within 60-90 seconds, the transaction is automatically canceled.



**Charge Amount Confirmation Prompt**



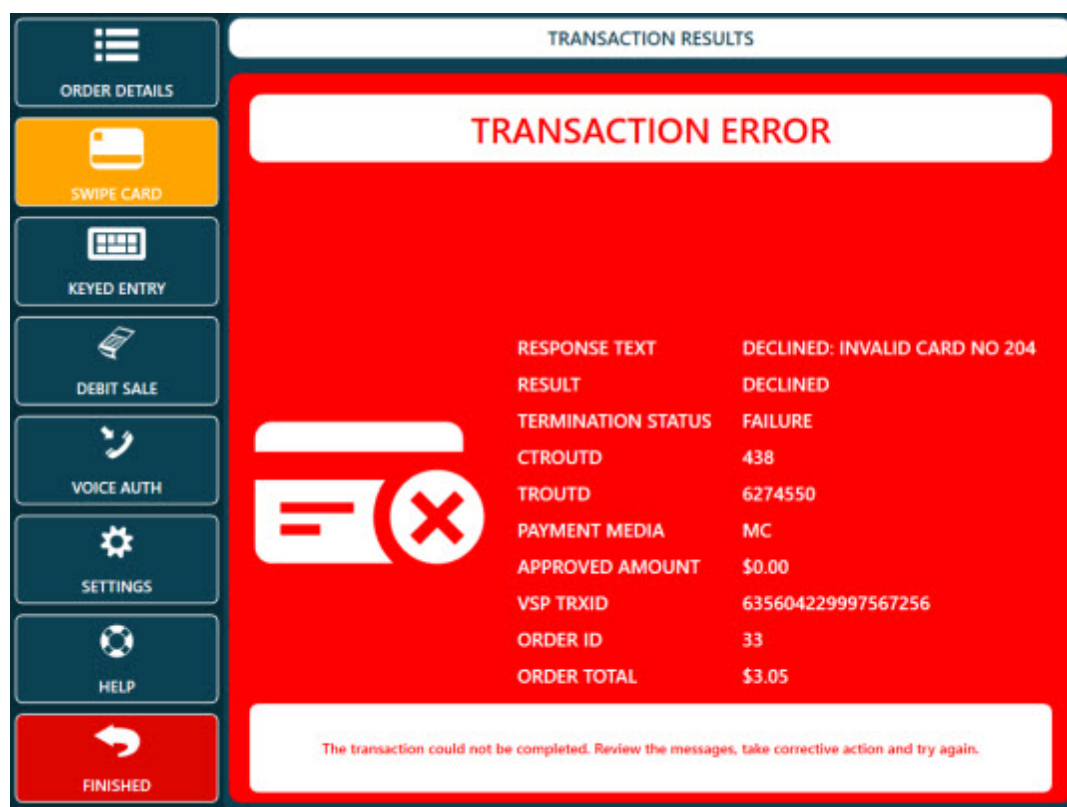
A successful result is indicated by a dark green background on the response screen. Note that if the approved amount is different from the transaction amount, the background color is indigo. This may occur when a prepaid card with insufficient funds is used.

TRANSACTION RESULTS	
CAPTURED	
PRINT RECEIPT	SIGNATURE SLIP
ADD TIP	
RESPONSE TEXT	CAPTURED
RESULT	CAPTURED
TERMINATION STATUS	SUCCESS
CTROUTD	439
ACCT NUM	540522*****2226
CARDHOLDER	MC TEST
APPROVED AMOUNT	\$13.52
VSP TRXID	635604233035223080
ORDER ID	34
ORDER TOTAL	\$13.52

**Successful Transaction**

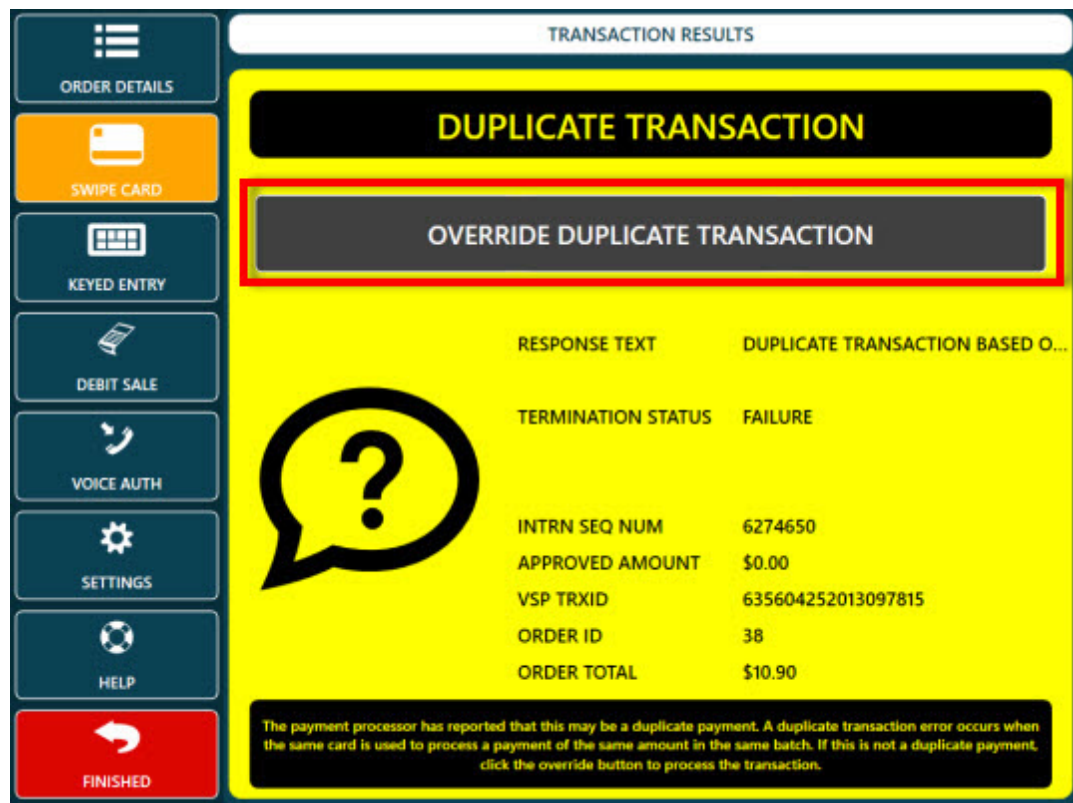
An unsuccessful transaction is indicated by a red background. The reason for the failed transaction is usually indicated by the Response Text field.





#### Unsuccessful Transaction

A duplicate transaction occurs if the same card is used to charge an order of the same amount in the same batch and is indicated by a yellow background on the transaction results screen. If the transaction is not a duplicate, press the override button to try again.



Duplicate Transaction

#### 10.8.5.4 Add Tip/Close Tab

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

Login a press the Credit Cards button at the bottom right to view a list of credit card transactions processed since the last end of day was run. Note that the Close Tab and Add Tip transaction is only available at the same station where the original transaction was processed.



**Main Screen Credit Cards Button**

The transaction status at the right of each transaction is color coded as follows:

- **Green**: The transaction has been captured with a tip. The transaction is added to the current batch and will be settled when the batch is run.
- **Yellow**: The transaction has been captured with no tip. The transaction is added to the current batch and will be settled when the batch is run.
- **Red**: The transaction has not been captured and will not be added to the current batch until a tip is added. This applies to transactions that were started using the Open Tab method, including bar tabs.

**ADD TIP**

SELECT THE TRANSACTION TO ADD A GRATUITY OR USE THE NUMBERPAD TO ENTER THE TRANSACTION ID

**ENTER THE TRANSACTION ID**

SHOW ALL OPEN TABS NO TIP ADDED

**DEMO U #25**

CTROUTD	428
TRANS ID	31
STATION	1
PREAUTH	\$13.06
TIP	\$0.54

**DEMO U #26**

CTROUTD	429
TRANS ID	35
STATION	1
SALE	\$6.76
TIP	\$0.00

**DEMO U #27**

CTROUTD	430
TRANS ID	36
STATION	1
SALE	\$11.69
TIP	\$0.00

**DEMO U #28**

CTROUTD	431
TRANS ID	37
STATION	1
SALE	\$11.55
TIP	\$0.00

**DEMO U #29**

CTROUTD	432
TRANS ID	41
STATION	1
PREAUTH	\$12.54
TIP	\$0.00

**DEMO U #32**

CTROUTD	0
TRANS ID	45
STATION	1
SALE	\$6.76
TIP	\$0.00

Credit Card Transactions Screen

Select any transaction or enter the transaction id from the signature slip to display the number pad for tip entry. Note that a zero tip amount is valid and can be used to run a Close Tab transaction or to reset a previously entered tip.

ENTER THE GRATUITY AMOUNT

ADD TIP

VOID

REFUND

SCHEDULE BATCH SETTLEMENT

SETTINGS

TRANSACTION LOG

HELP

FINISHED

1 2 3

4 5 6

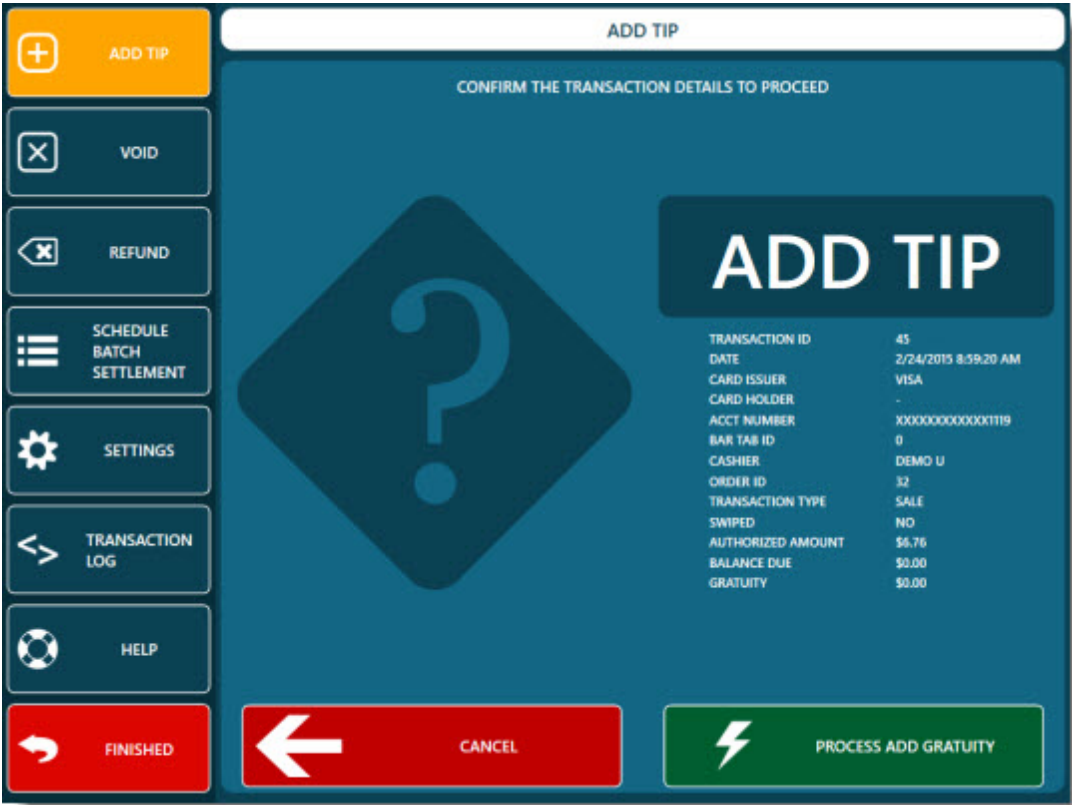
7 8 9

0

CANCEL

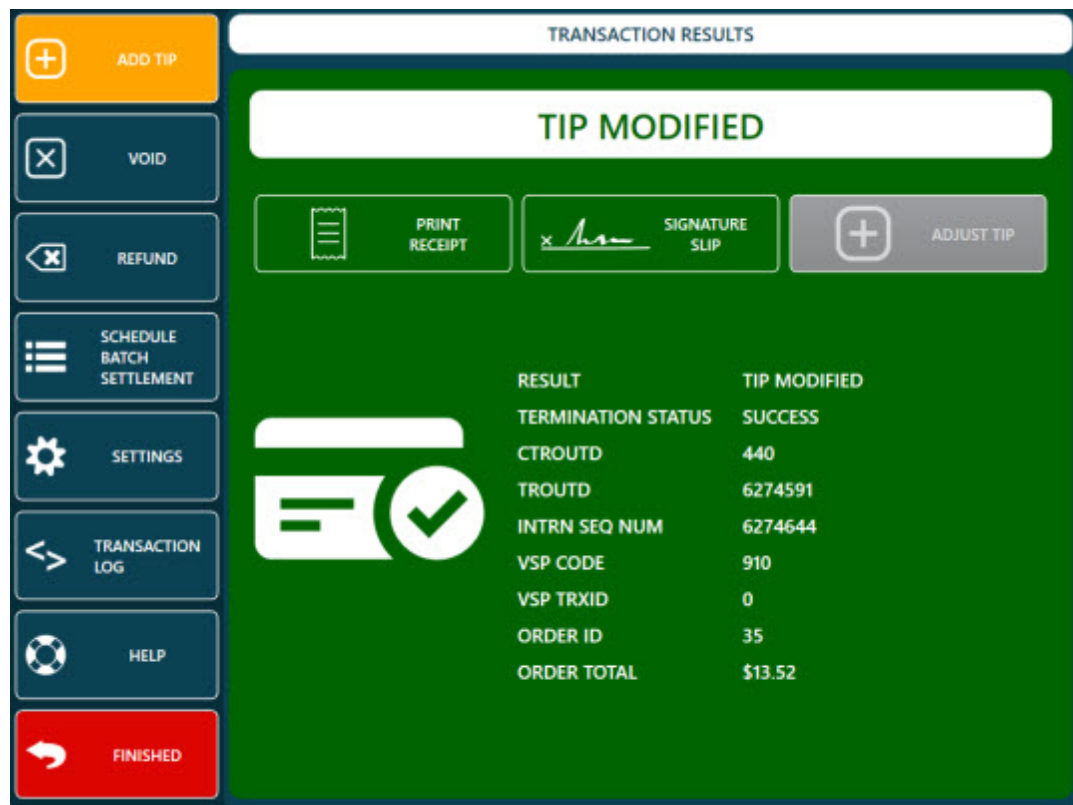
#### Tip Amount Entry

Confirm the transaction summary and press the green button at the bottom to send the transaction to the V<sup>x</sup> device.



Transaction Confirmation

As with a Sale or Open Tab transaction, a successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background.



Transaction Results

#### 10.8.5.5 Correcting Mistakes

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

An incorrect tip amount processed using the Add Tip or Close Tab method can be easily corrected by selecting the original transaction on the credit card transactions list and processing another Add Tip or Close Tab transaction with the correct gratuity amount. In the image below, a 55 cent tip was previously added to a Sale using the Add Tip method. Note that the tip can only be corrected at the station where the original transaction was processed.



Credit Card Transactions List

Select the transaction and enter the correct tip amount. In this example the incorrect 55 cent tip will be replaced by a 25 cent tip.



ENTER THE GRATUITY AMOUNT

\$0.25

CANCEL

1 2 3

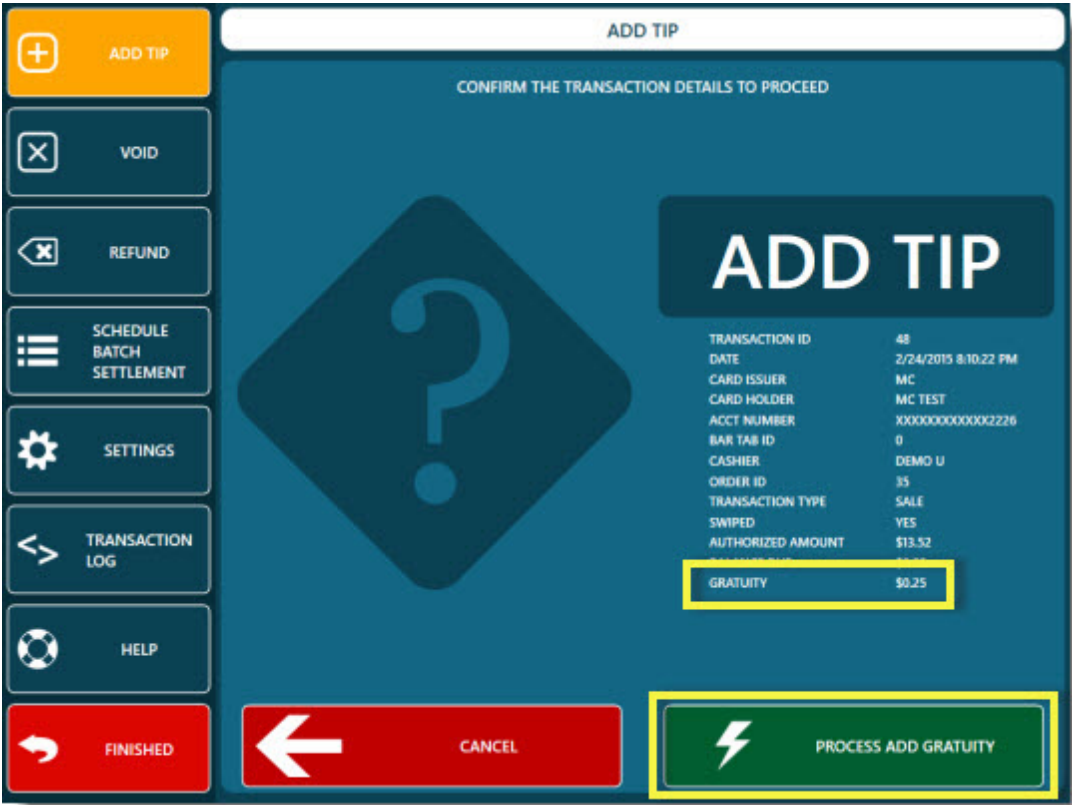
4 5 6

7 8 9

0

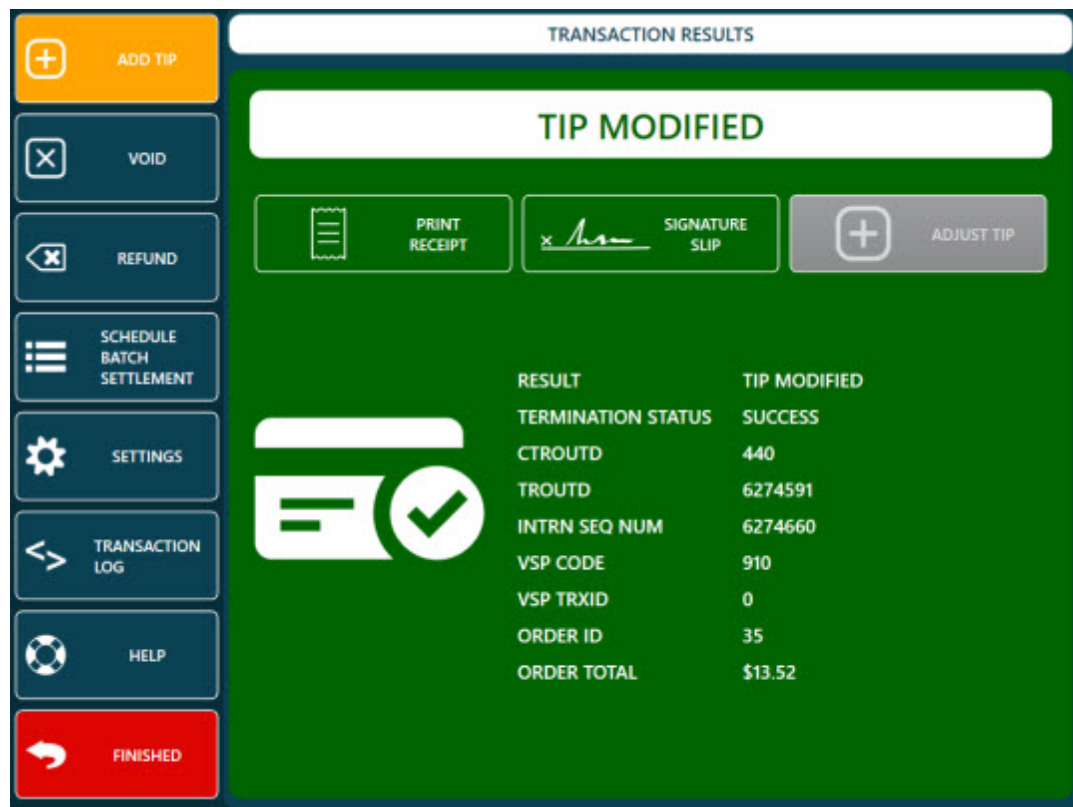
#### Tip Amount Entry

Confirm the transaction details displayed on the summary screen and press the green button to send the transaction to the V\* device.



Transaction Confirmation

A successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background.




Transaction Results

#### 10.8.5.6 Void Transaction

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

An incorrect transaction can be voided to permanently remove the charge from the customer's card. A void should not be used to correct and incorrect tip amount.<sup>488</sup>



**Warning: A credit card void is permanent and cannot be reversed**

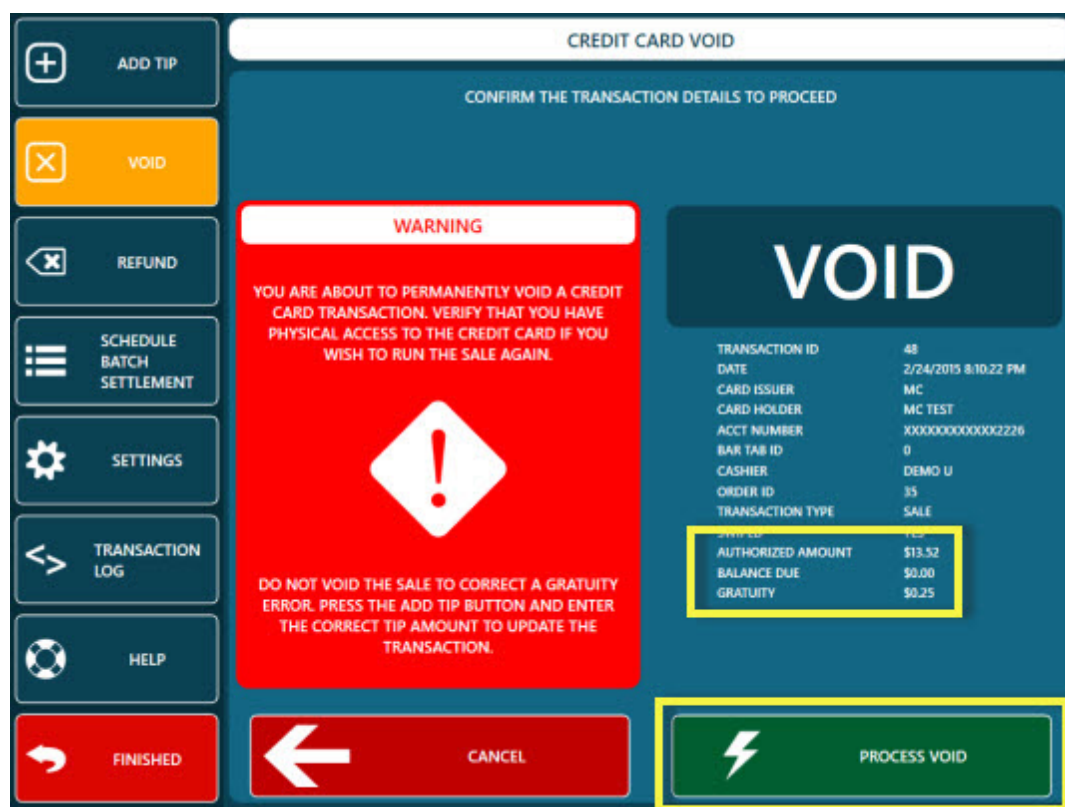
**Do not void a credit card transaction if you do not have physical access to the customer's card or the account number, expiration date and CVV.**

Login and open the credit card transactions list. Press the Void button at the left to view a list of credit card transactions processed since the last end of day was run. Select the transaction or enter the transaction id from the signature slip to continue. In the example below a transaction in the amount of \$13.77 will be voided.



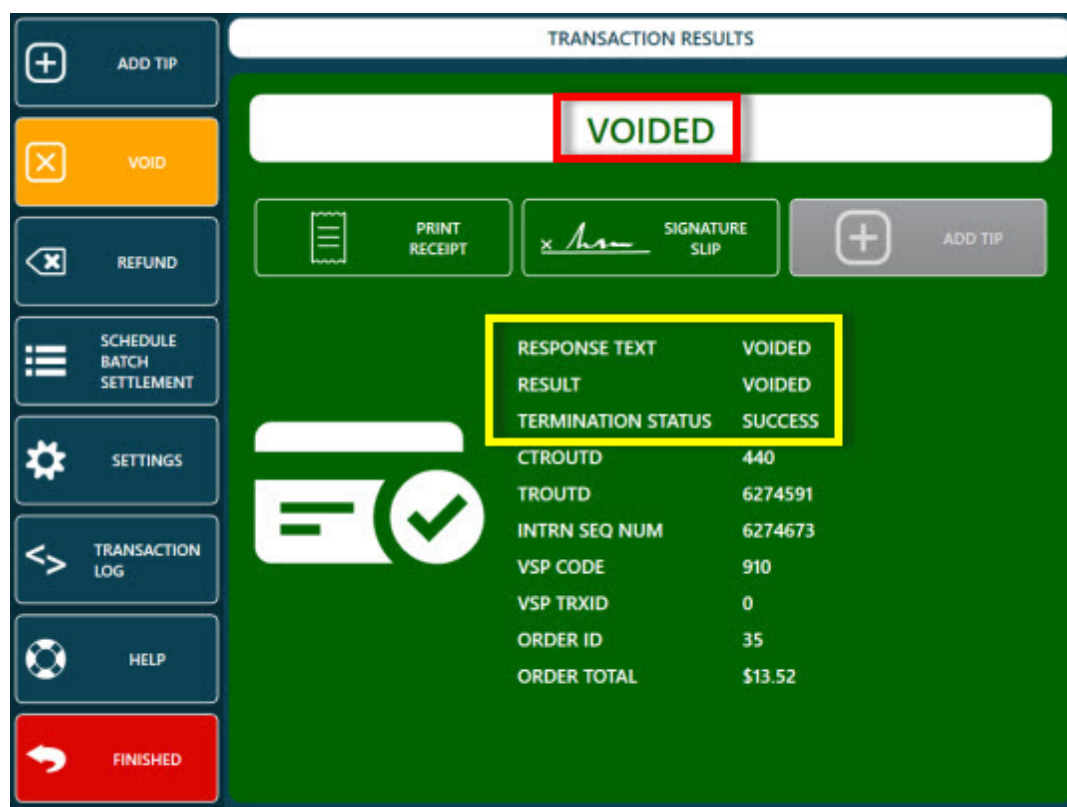
Credit Card Transactions List

Verify the transaction details and press the green button at the bottom to send the transaction to the V<sup>x</sup> device.



Transaction Confirmation

A successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background.



Transaction Results

### 10.8.5.7 Refund Transaction

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

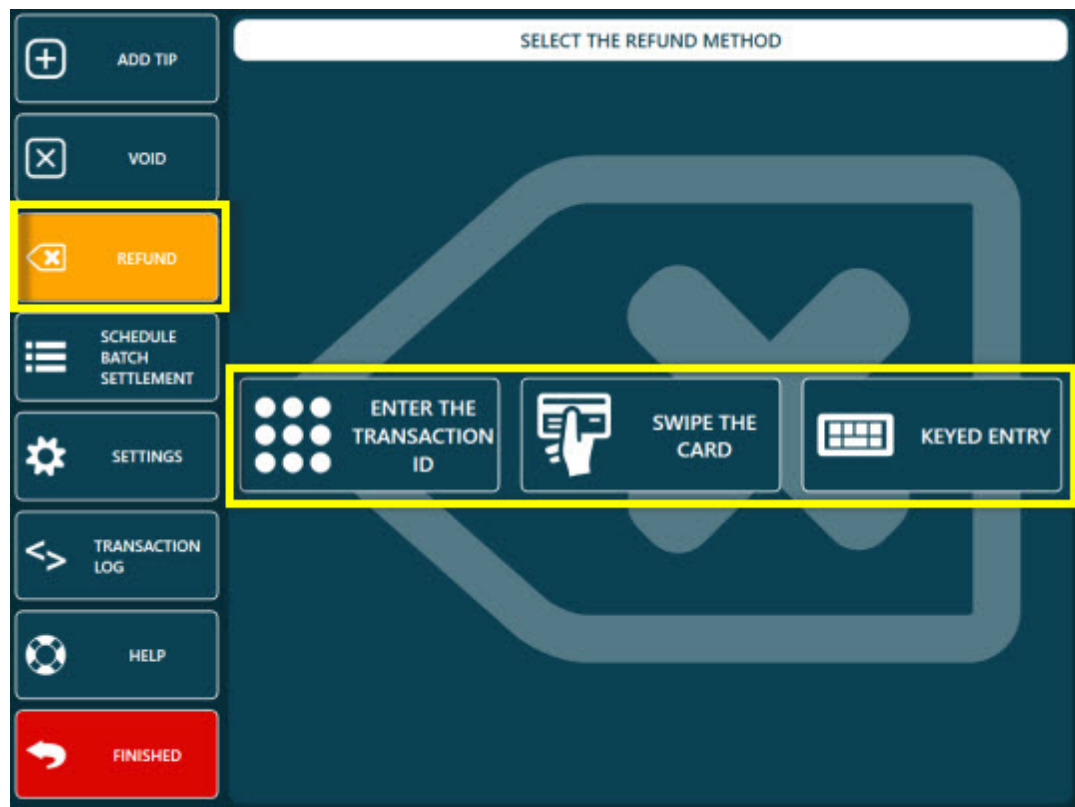
Refunds are issued when it is necessary to return funds to a customer's account after the batch has been settled for a credit card transaction. The void transaction method is generally not available for transactions that are more than a few days old so that the Refund method is the only option to return funds to the customer's account. However, it is always preferable to issue a void when possible.

Two types of refunds are available:

- [Refund applied a specific transaction](#)<sup>[495]</sup>: Access to the customer's card is not required.
- [Refund entered using the customer's card](#)<sup>[501]</sup>: Physical access to the customer's card or account number, expiration date and CVV code is required.

#### Refund applied a specific transaction

Login, press the Credit Cards button and select the Refund button at the left to select the refund method.



#### Reund Method Selection

When issuing a refund based on a specific transaction, enter the transaction id from the signature slip.

**REFUND**

SELECT THE TRANSACTION TO REFUND OR USE THE NUMBERPAD TO ENTER THE TRANSACTION ID

**ENTER THE TRANSACTION ID**

SHOW ALL OPEN TABS NO TIP ADDED

47

CANCEL

1 2 3

4 5 6

7 8 9

0

**DEMO U #27**

CTROUTD	430
TRANS ID	36
STATION	1
SALE	\$1.69
TIP	\$0.00

**DEMO U #28**

CTROUTD	431
TRANS ID	37
STATION	1
SALE	\$11.55
TIP	\$0.00

**DEMO U #29**

CTROUTD	432
TRANS ID	41
STATION	1
PREAUTH	\$12.54
TIP	\$0.00

**DEMO U #32**

CTROUTD	0
TRANS ID	45
STATION	1
SALE	\$6.76
TIP	\$0.00

**DEMO U #34**

CTROUTD	439
TRANS ID	47
STATION	1
SALE	\$13.52
TIP	\$0.00

**DEMO U #37**

CTROUTD	441
TRANS ID	50
STATION	1
SALE	\$10.90
TIP	\$0.00

**FINISHED**

Transaction ID Number Pad

Enter the refund amount and press the green button at the bottom to proceed.



ENTER THE REFUND AMOUNT

\$5.00

CANCEL

1 2 3

4 5 6

7 8 9

0

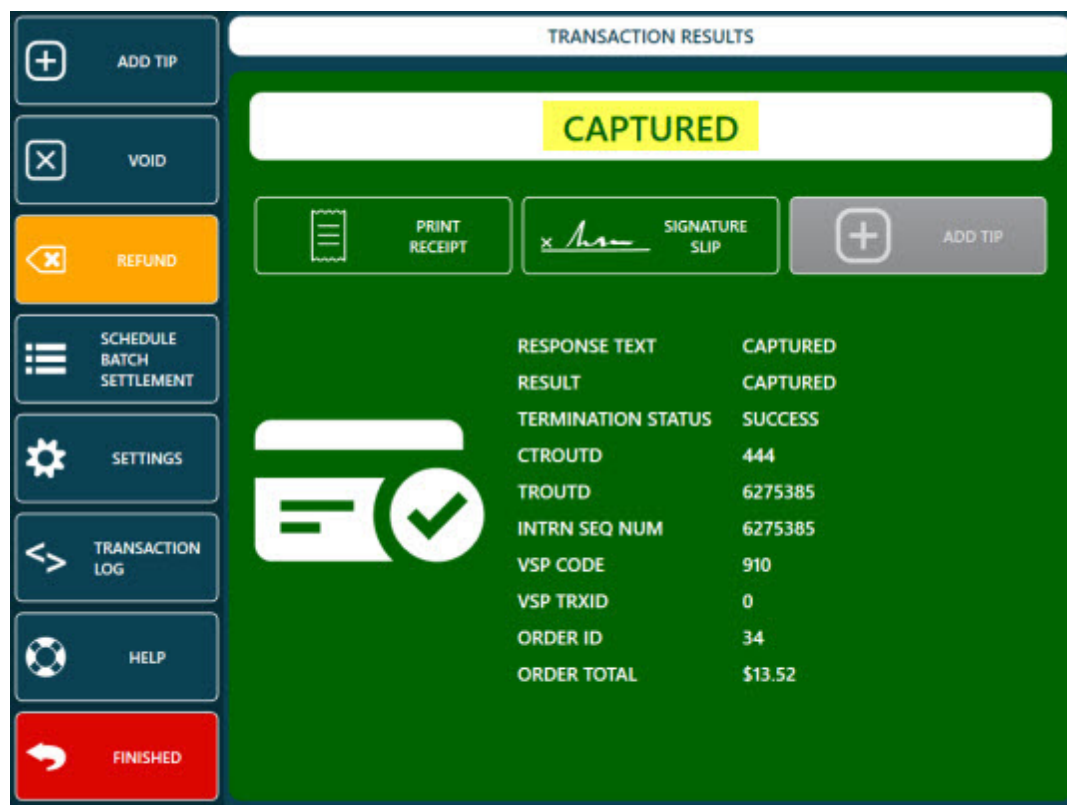
Transaction ID Number Pad

Verify the transaction details and press the green button at the bottom to send the refund transaction to the V<sup>x</sup> device.



Refund Transaction Confirmation

A successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background.



### Transaction Results

The image below displays the results at the Verifone Point online portal. Note that the refund is displayed as a Credit and appears as a separate transaction. The parentheses indicate that it is a negative value and is deducted from the total. In this example, both the original transaction and refund appear on the same report. In most cases, the original transaction and refund transaction will be in separate batches and will appear on separate reports.

Trans Time	Cardholder	Command	Account Number	Trans ID	Auth Code	User ID	Trans Amount
Terminal: 0001							
2015.02.23							
2 transactions:							\$18.97
19:43:55	MC TEST	SALE	MC 540522*****2226	6269686	199369	MANAGER	\$5.45
20:27:41	MC TEST	SALE	MC 540522*****2226	6269815	195003	MANAGER	\$13.52
2015.02.24							
6 transactions:							\$29.98
07:25:01	MC TEST	ADD_TIP	MC 540522*****2226	6265415	198707	MANAGER	\$1.72
07:26:04	MC TEST	ADD_TIP	MC 540522*****2226	6265174	197424	MANAGER	\$11.34
20:06:56	MC TEST	SALE	MC 540522*****2226	6274584	191787	MANAGER	\$13.52
20:37:00	MC TEST	SALE	MC 540522*****2226	6274648	194385	MANAGER	\$10.90
21:49:48		CREDIT	MC 540522*****2226	6274867		MANAGER	(\$2.50)
22:54:29		CREDIT	MC 540522*****2226	6275385		MANAGER	(\$5.00)
8 Terminal transactions:							\$48.95
8 transactions:							\$48.95

### Online Report

For extended information, click the Trans ID value (outlined in red in the image above) to view the transaction details. Note that the value shown in the Transaction ID field is different than the AmigoPOS credit card transaction ID.

**Transaction Detail**

Transaction Date: 2015.02.24		
Transaction Time: 22:54:29		
Transaction ID: 6275385		
<b>C Transaction ID: 444</b>		
<b>Invoice Number: 35</b>		
<b>Transaction Type: CREDIT</b>		
Processor ID: PYMT		
Status Code: 4-Captured		
Result Code: 4		
Batch: 0		
Payment Media: MC		
Credit Card Account: 540522*****2226		<b>PAYware Mobile</b>
Cardholder Name:		Receipt Email:
Card Present: Unknown		Custom Fields:
Transaction Forced:		
Authorization Code:		
Orig Trans Amount: \$5.00		
Transaction Amount: \$5.00	CREDIT	
Tip Amount: \$0.00		
Tax Amount: \$0.00		
Cashback Amount: \$0.00		
Reward Amount:		Reward Code:
<b>Total Amount: \$5.00</b>		
Reference:	Table Number:	Block Activate Count: 0
AVS Response:	Ticket Number:	Block Activate \$:

**Transaction Details****Refund entered using the customer's card**

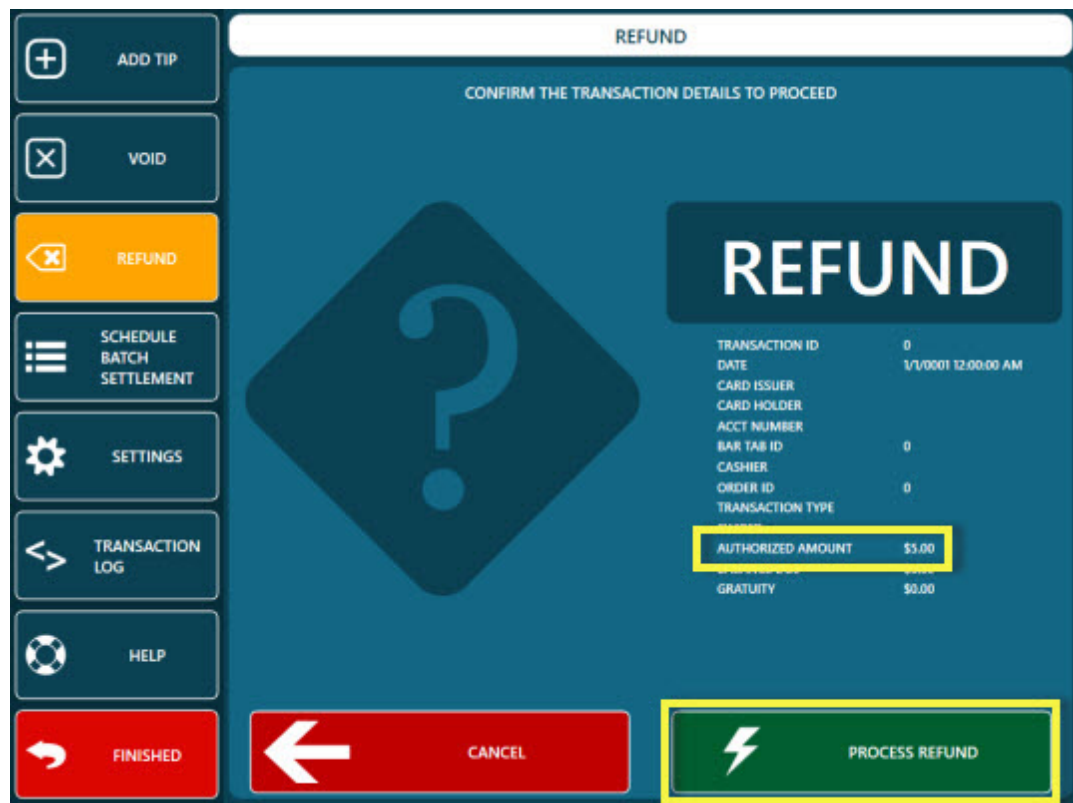
When a refund is issued using the Swipe Card or Keyed Entry method, the user is not prompted to enter a transaction id or to select a previous transaction. The only information entered at the pos is the refund amount. Enter the refund amount and press the green button at the bottom to proceed.



The image shows the 'ENTER THE REFUND AMOUNT' screen in the AmigoPOS 8 application. On the left is a vertical sidebar with icons and labels: '+ ADD TIP', 'x VOID', 'x REFUND' (highlighted in orange), '≡ SCHEDULE BATCH SETTLEMENT', '⚙ SETTINGS', '↔ TRANSACTION LOG', '🛑 HELP', and '↩ FINISHED'. The main area features a top input field with '\$5.00' in yellow, a red left arrow button, and a grey 'CANCEL' bar. Below is a numeric keypad with digits 1-9 and 0. At the bottom right is a large green button with a white right arrow, which is highlighted with a yellow border.

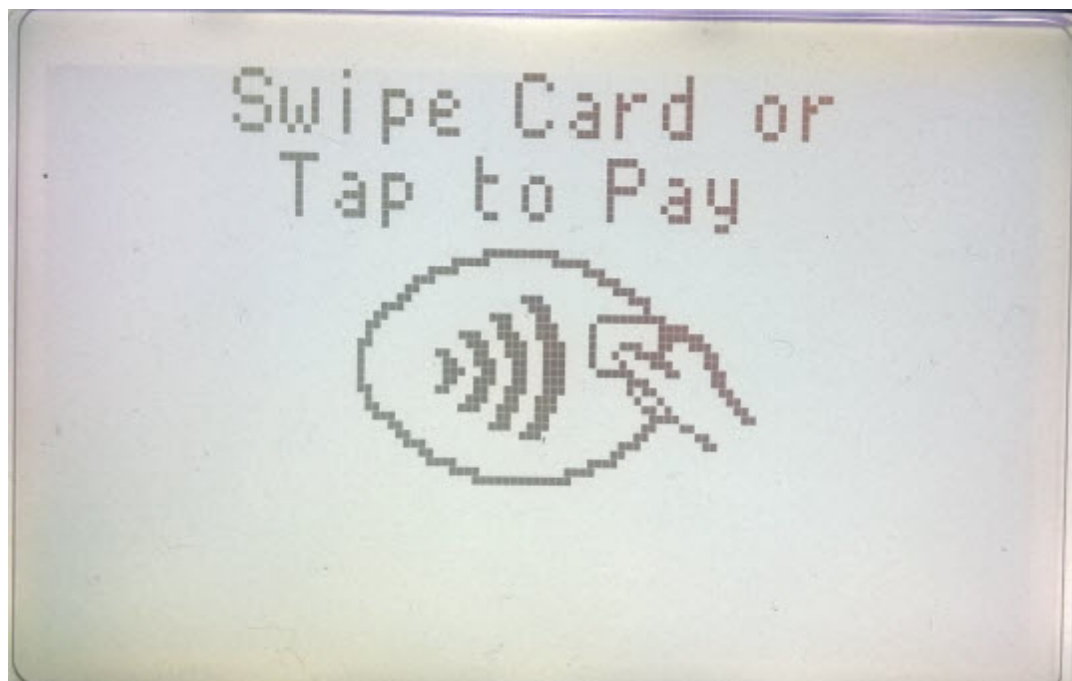
#### Refund Amount Entry

Confirm the refund transaction details and press the green button at the bottom to send the refund transaction to the V<sup>x</sup> device.



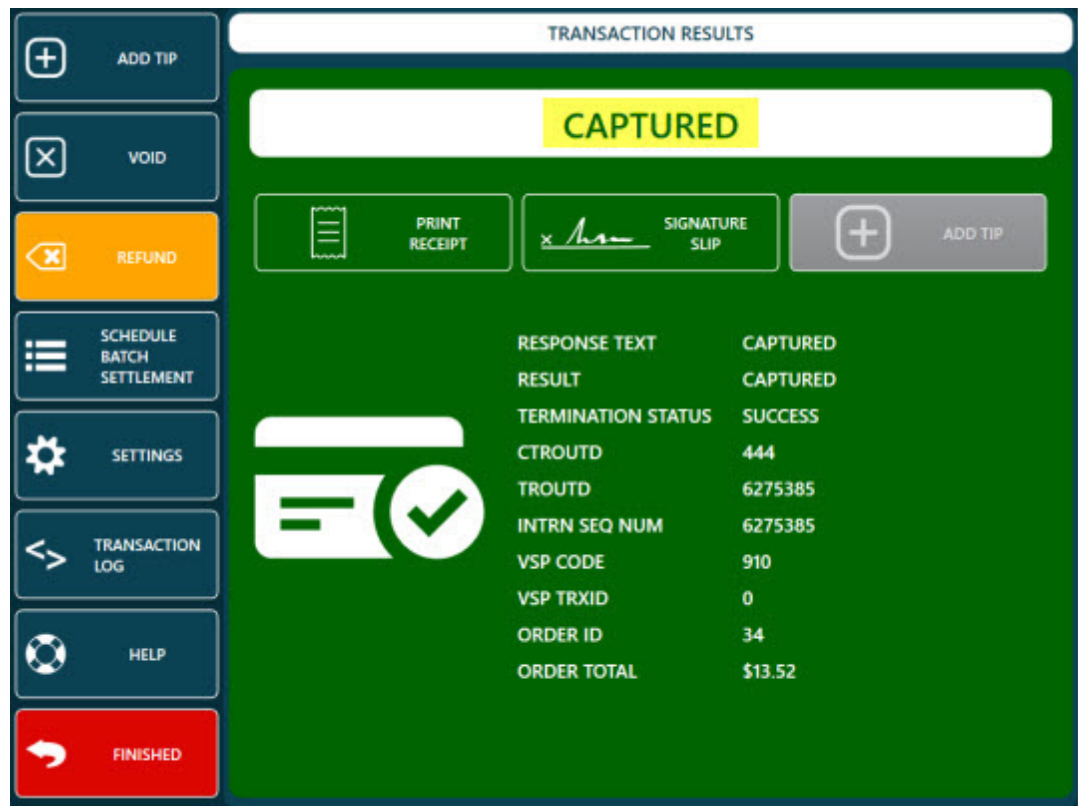
**Refund Transaction Confirmation**

The card swipe prompt is displayed for approximately 90 seconds before timing out. If a card is not swiped, tapped or read within the timeout period, the transaction is automatically canceled.



**Card Swipe Prompt**

A successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background.



Transaction Results

### 10.8.6 Bar Tabs

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

Bar tabs are used to preauthorize a card for a fixed amount when the order is started and then captured with gratuity when the order is complete. Bar tabs always use the [Open Tab/Close Tab](#) transaction method, regardless of the back office setting for regular credit card transactions.

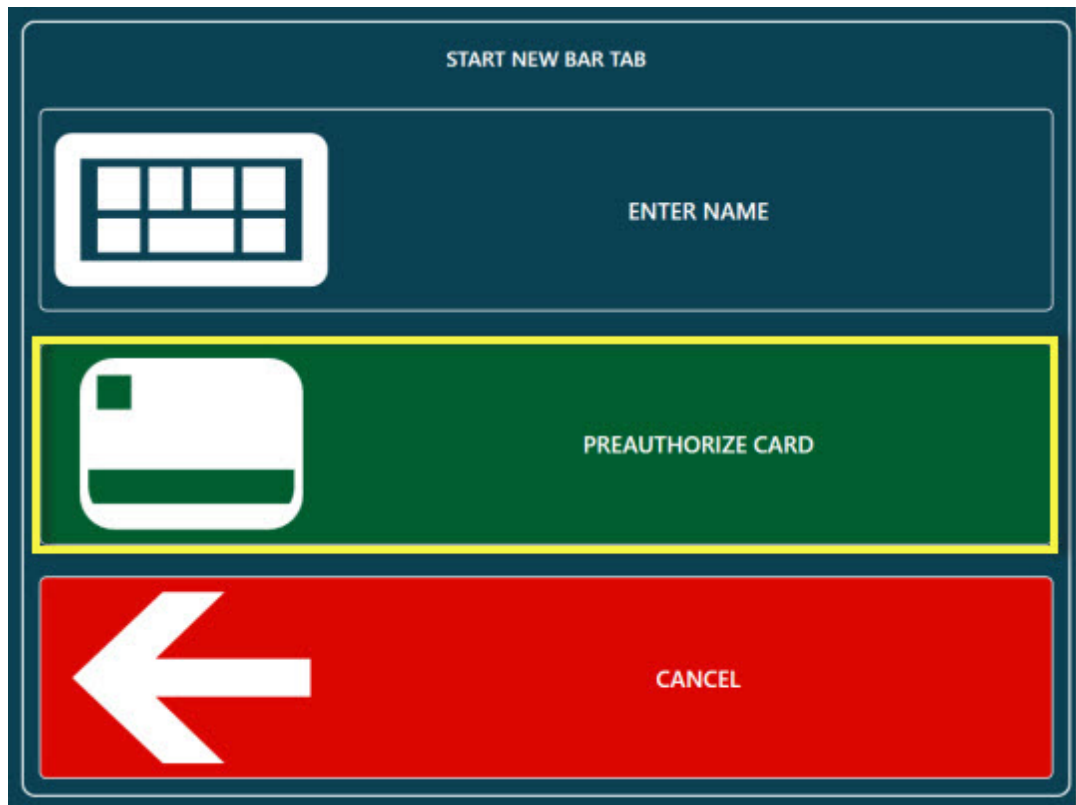
Start a new bar order and press the Start Tab button at the top right. In the example below a bar tab is started for an order total of \$12.21.



#### Starting a New Bar Tab

Press Preauthorize Card to open the credit card transaction screen.





#### Starting a New Bar Tab

Press Swipe Card at the left to send the Open Tab transaction to the V\* device. Note that the bar tab amount can be adjusted by pressing the green button at the bottom.



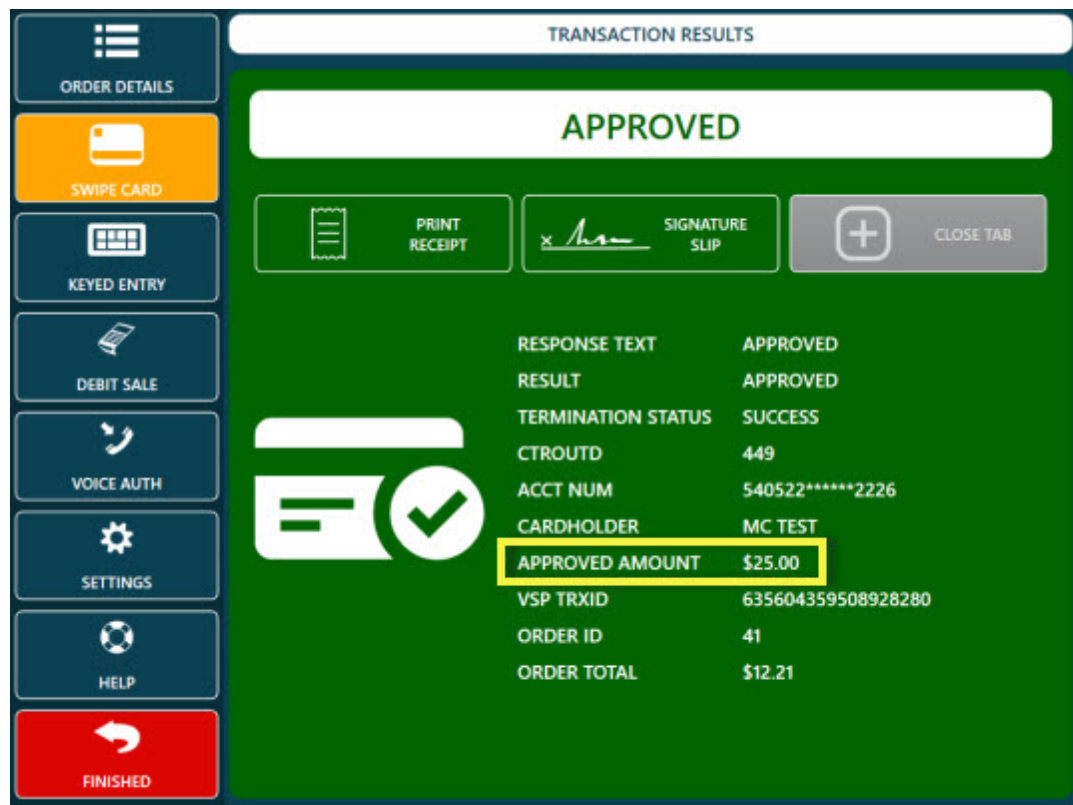
Starting a New Bar Tab

Allow a few seconds to receive a response from the V<sup>x</sup> device.



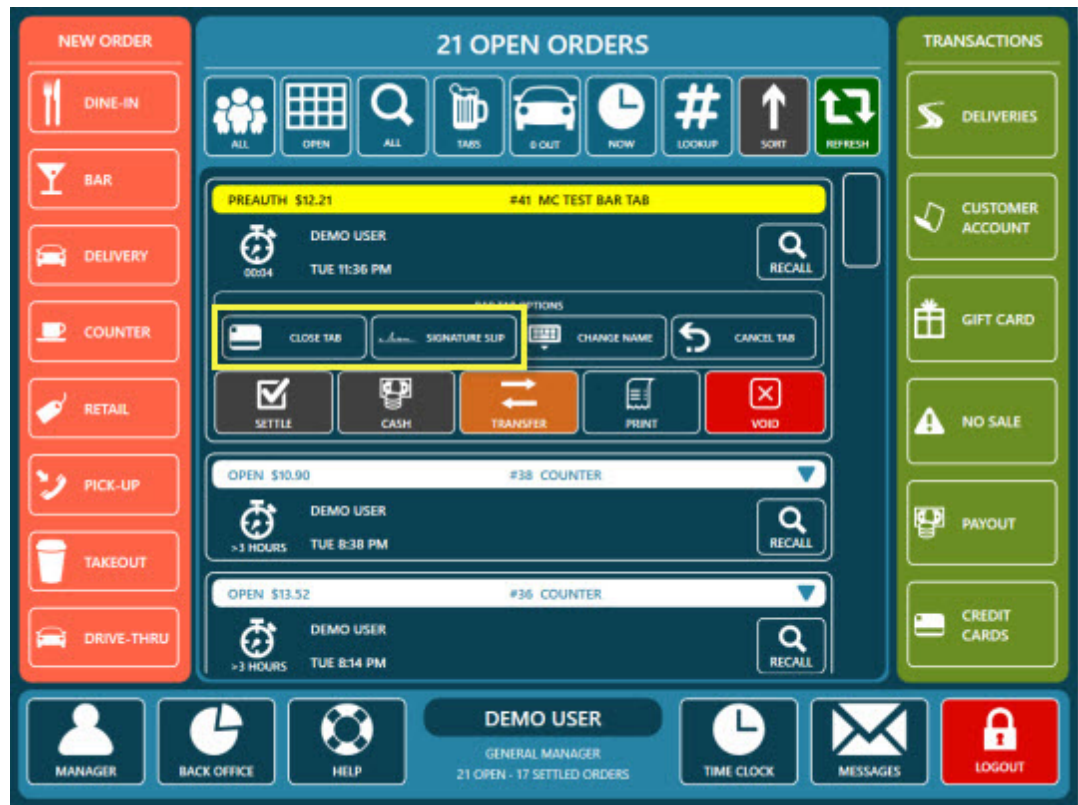
#### Starting a New Bar Tab

A successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background. Note the approved amount is the amount of the \$25.00 bar tab, not the \$12.21 order total. In addition, the "Approved" transaction result indicates that the Open Tab transaction will not be added to the current batch until the corresponding Close Tab transaction is run, similar to a preauthorize and postauthorize transaction.



#### Starting a New Bar Tab

Expand the order on the recall list when the customer is ready to close the bar tab. In this example no additional items were added to the order and the order total is still \$12.21. Print a signature slip so that the customer can enter the gratuity amount and signature. Then press the Close Tab button to open the credit card transaction screen.



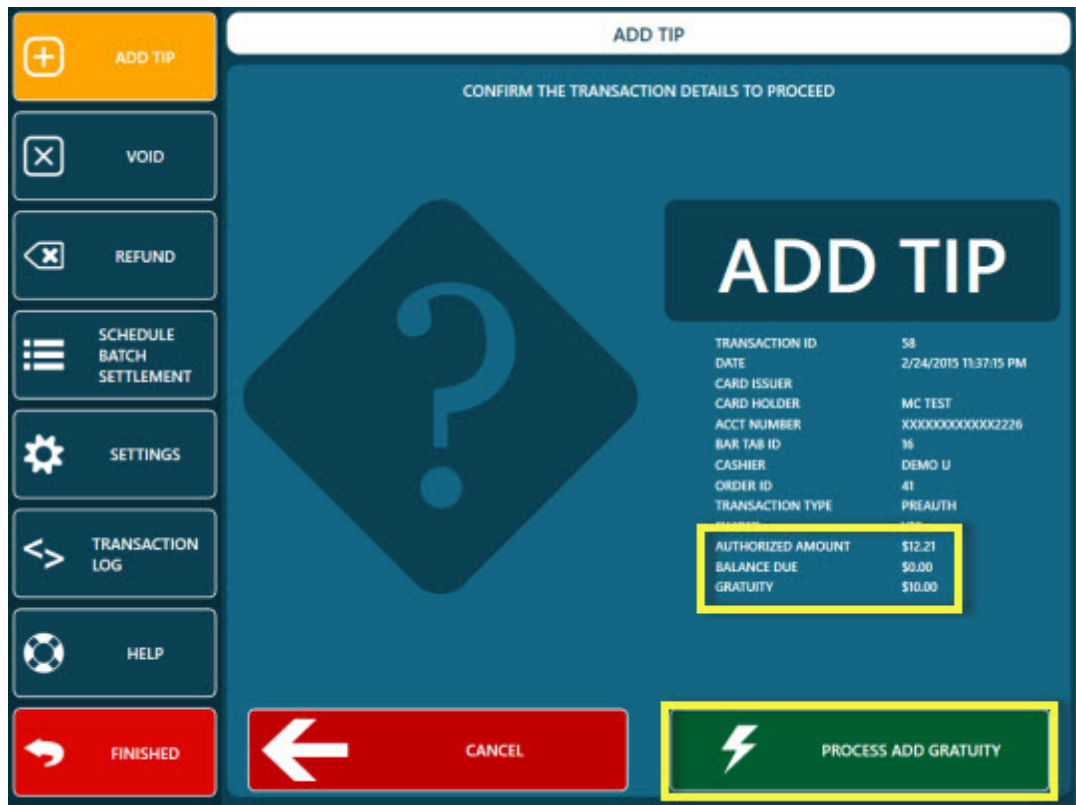
## Starting a New Bar Tab

Enter the gratuity amount and press the green button to continue. In this example a \$10.00 gratuity is added. Note that a zero tip amount is valid for transactions that do not require a gratuity.

The screenshot shows the 'ENTER THE GRATUITY AMOUNT' screen in the Amigo Point Of Sale application. On the left is a vertical sidebar with icons and labels: 'ADD TIP' (orange), 'VOID' (blue with X), 'REFUND' (blue with X), 'SCHEDULE BATCH SETTLEMENT' (blue with list icon), 'SETTINGS' (blue with gear icon), 'TRANSACTION LOG' (blue with double arrows icon), 'HELP' (blue with lifebuoy icon), and 'FINISHED' (red with arrow icon). The main area has a title bar 'ENTER THE GRATUITY AMOUNT'. Below it is a white input field containing '\$10.00' in black text, with a red button with a white left arrow to its right. A grey 'CANCEL' button is below the input field. A numeric keypad with buttons 0-9 is in the center. At the bottom right, a green button with a white right arrow is highlighted with a yellow border. The button 0 is also highlighted with a yellow border.

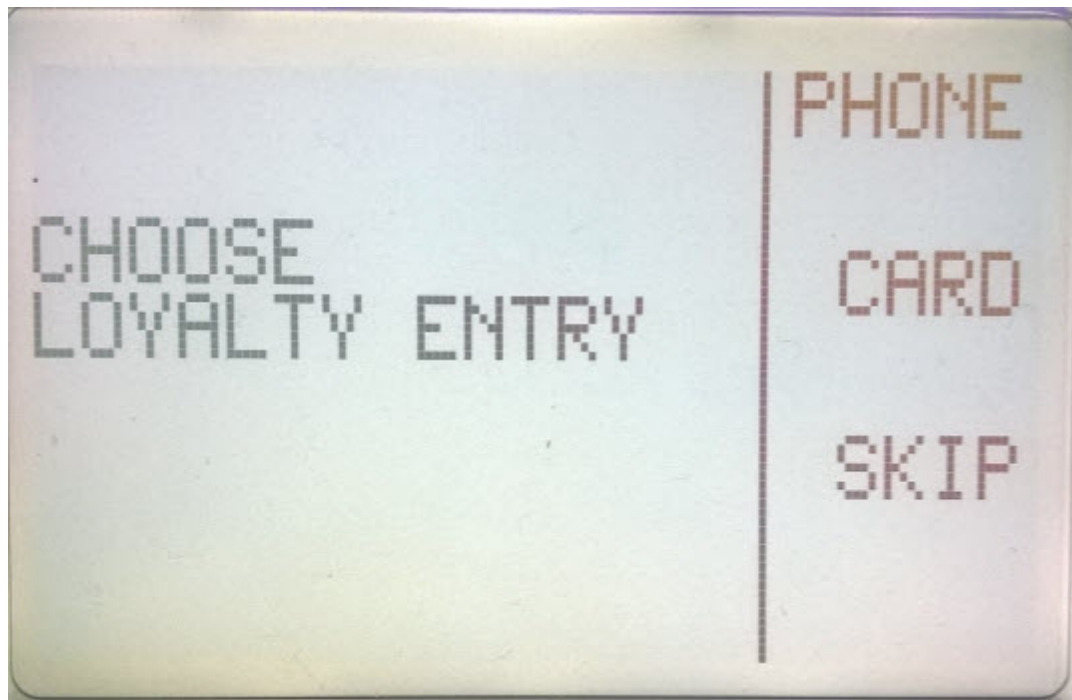
#### Starting a New Bar Tab

Verify the transaction details and press the green button at the bottom to send the Close Tab transaction to the V<sup>x</sup> device. In this example the total transaction amount is \$22.21, consisting of the order total \$12.21 and a \$10.00 tip.



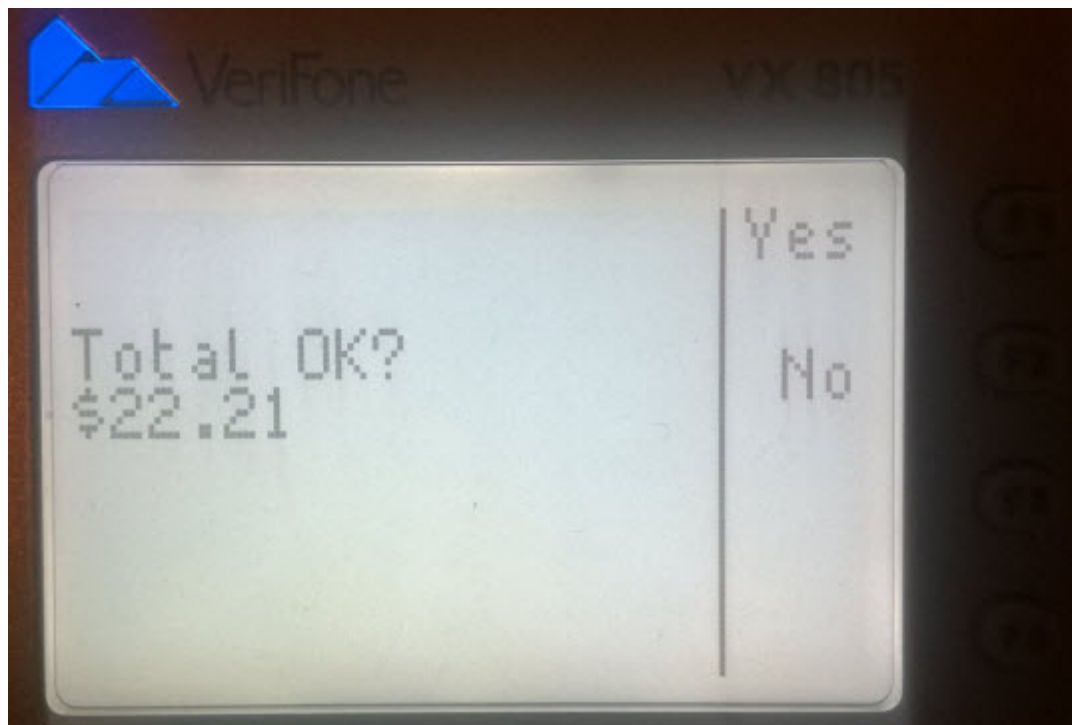
#### Starting a New Bar Tab

When closing an open tab, the loyalty card prompt will appear if the device is set to prompt for loyalty card input. If phone number is not entered or a loyalty card is not swiped, the loyalty card prompt will timeout in approximately 60 seconds and the card swipe prompt is displayed.



**Loyalty Prompt**

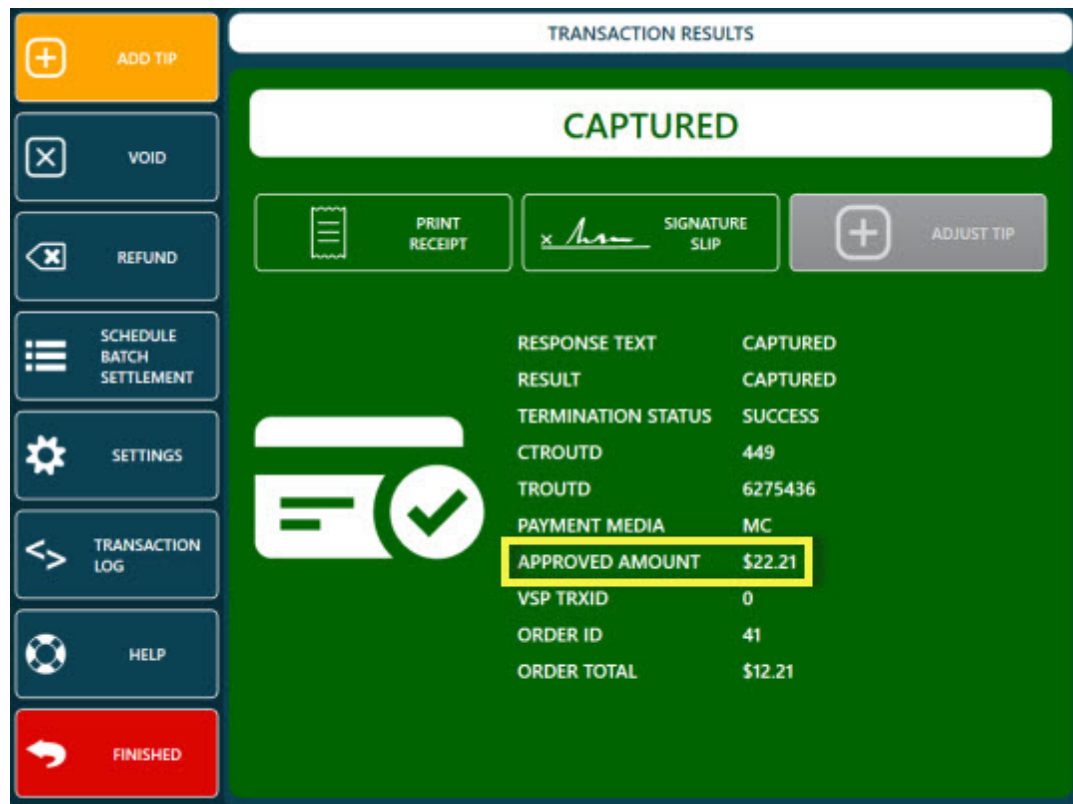
The total amount confirmation prompt is displayed. If No is selected or Yes is not selected within 60-90 seconds, the transaction is automatically canceled. Note that the total amount shown is the amount of the order plus \$10.00 tip, which is less than the original open tab amount.



**Total Amount Confirmation Prompt**



A successful result is indicated by a dark green background on the response screen and an unsuccessful transaction is indicated by a red background. Note that an [incorrect tip amount](#)<sup>[488]</sup> can be adjusted by running the close tab transaction again.

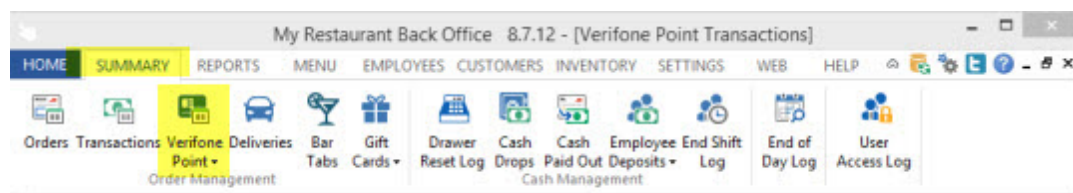


Starting a New Bar Tab

### 10.8.7 Back Office Usage

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

A list of Verifone Point transactions is available in Back Office>Settings>Verifone Point. Only credit card transactions are shown as of this writing (February 22, 2015).



Back Office/Summary

**Verifone Point Transactions**

Refresh

Current Day: ▼

Start: 2/22/2015 15:00

End: 2/22/2015 15:00

Minimum Tip:

CTroutD:

This Station: ▼

Captured: ▼

No Tip: ▼

Exclude Voids: ▼

COUNTER SALE \$10.90		BAR OPEN TAB \$25.00	
Order ID	3	Order ID	7
Amount	\$10.90	Amount	\$25.00
Tip	\$0.00	Tip	\$0.00
Captured	<input checked="" type="checkbox"/>	Captured	<input checked="" type="checkbox"/>
Server	DEMO U	Server	DEMO U
CTroutD	397	CTroutD	401
TroutD	6265174	TroutD	6265419
Pos Station	1	Pos Station	1
Cashier	DEMO U	Cashier	DEMO U
Void	<input type="checkbox"/>	Void	<input type="checkbox"/>
Timestamp	2/20/2015 2:18:53 PM	Timestamp	2/20/2015 4:03:08 PM
XML Request	<a href="#">Click to view</a>	XML Request	<a href="#">Click to view</a>
XML Response	<a href="#">Click to view</a>	XML Response	<a href="#">Click to view</a>
Bar Tab ID	0	Bar Tab ID	1

### Transactions Log

The list of transactions can be filtered by the following search criterion:

- **Date Range:** The list can be set to display the current business day (default), previous 7 days, previous 30 days or a custom date range can be set.
- **Minimum Tip Amount:** When set to a value larger than zero, the list displays transactions with a tip amount equal to or greater than the minimum amount.
- **CTroutD:** Enter numeric CTroutD to display linked transactions. Note that a Sale and corresponding Add Tip, Void or Refund will have the same CTroutD. This value is unique only to a specific device and it may be necessary to set the Pos Station ID filter to properly filter the list.
- **Pos Station ID:** Set the Pos Station ID to filter the list by station. This is useful when filtering the list by CTroutD in order to eliminate unrelated transactions that contain the same CTroutD.
- **Captured Status:** Set the Capture status to view transactions that have or have not been added to the current batch.
- **Tip Status:** The Tip Status filter is useful when adding tips at the end of day so that only transactions when no tip applied are displayed.
- **Void Status:** The Void filter displays transactions that have been voided. Note that this is not the same as the Void transaction type, which is used to void a Sale or Close Tab transaction.
- **Transaction Type:** All transaction types are displayed by default. Select a transaction type to filter the list accordingly.
- **Order Type:** All order types are displayed by default. Select a transaction type to filter the list accordingly.
- **Server:** All servers are displayed by default. Select a server to filter the list accordingly. The server is the user that submitted the original order on the order entry screen.
- **Cashier:** All cashiers are displayed by default. Select a cashier to filter the list accordingly. The cashier is the user that initiated the credit card transaction.

**Verify Point Transactions**

Refresh

Current Day

Start: 2/22/2015 15

End: 2/22/2015 15

Minimum Tip:

CTroutID:

This Station:

All

No Tip

Include Voids

All Types

All Orders

All Servers

All Cashiers

COUNTER SALE \$10.90		BAR OPEN TAB \$25.00		COUNTER OPEN TAB \$25.00	
Order ID	2	Order ID	2	Order ID	2
Amount	\$10.90	Amount	\$25.00	Amount	\$25.00
Tip	\$0.00	Tip	\$0.00	Tip	\$0.00
Captured	<input checked="" type="checkbox"/>	Captured	<input checked="" type="checkbox"/>	Captured	<input checked="" type="checkbox"/>
Server	DEMO U	Server	DEMO U	Server	DEMO U
CTroutID	392	CTroutID	483	CTroutID	485
TroutID	6265174	TroutID	6265419	TroutID	6265476
Pos Station	1	Pos Station	1	Pos Station	1
Cashier	DEMO U	Cashier	DEMO U	Cashier	DEMO U
Void	<input type="checkbox"/>	Void	<input type="checkbox"/>	Void	<input type="checkbox"/>
Timestamp	2/20/2015 2:10:53 PM	Timestamp	2/20/2015 4:03:00 PM	Timestamp	2/20/2015 4:20:57 PM
XML Request	<a href="#">Click to view</a>	XML Request	<a href="#">Click to view</a>	XML Request	<a href="#">Click to view</a>
XML Response	<a href="#">Click to view</a>	XML Response	<a href="#">Click to view</a>	XML Response	<a href="#">Click to view</a>
Bar Tab ID	0	Bar Tab ID	1	Bar Tab ID	5
Card Details	HC XXXXX 2226	Card Details	XXXXX 2226	Card Details	XXXXX 2226
Device IP	192.168.1.7	Device IP	192.168.1.7	Device IP	192.168.1.7
Device Port	5015	Device Port	5015	Device Port	5015
Cardholder	HC TEST	Cardholder	HC TEST	Cardholder	HC TEST
Archived	<input type="checkbox"/>	Archived	<input type="checkbox"/>	Archived	<input type="checkbox"/>
Response Text	HC XXXXX 2226	Response Text	XXXXX 2226	Response Text	XXXXX 2226
Result	CAPTURED	Result	APPROVED	Result	APPROVED

### List Filters

Click the downward facing arrow to view a list of available options for a specific transaction. Only options that are applicable to a specific transaction type are enabled. For example, the SALE transaction displayed below does not offer the Close Tab or Delete Tab options. The transaction options can be hidden by clicking the upward facing arrow. Note that some options may be disabled due to the logged in user's job type [permissions](#).

**COUNTER SALE \$10.90**

**TRANSACTION OPTIONS**

Add Tip:

Close Tab:

Refund:

Void ☐

Reset Tip

Print

**BAR OPEN TAB \$25.00**

Order ID: 2

Amount: \$25.00

Tip: \$0.00

Captured: ☒

Server: DEMO U

CTroutID: 401

TroutID: 6265419

Pos Station: 1

Cashier: DEMO U

Void: ☐

Timestamp: 2/20/2015 4:03:00 PM

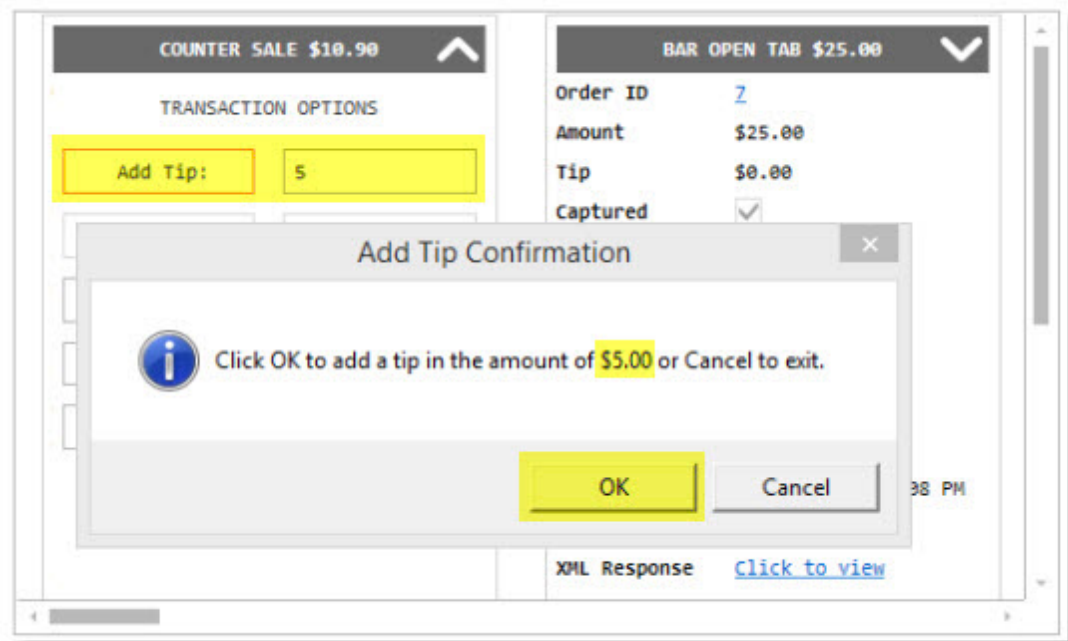
XML Request: [Click to view](#)

XML Response: [Click to view](#)

Bar Tab ID: 1

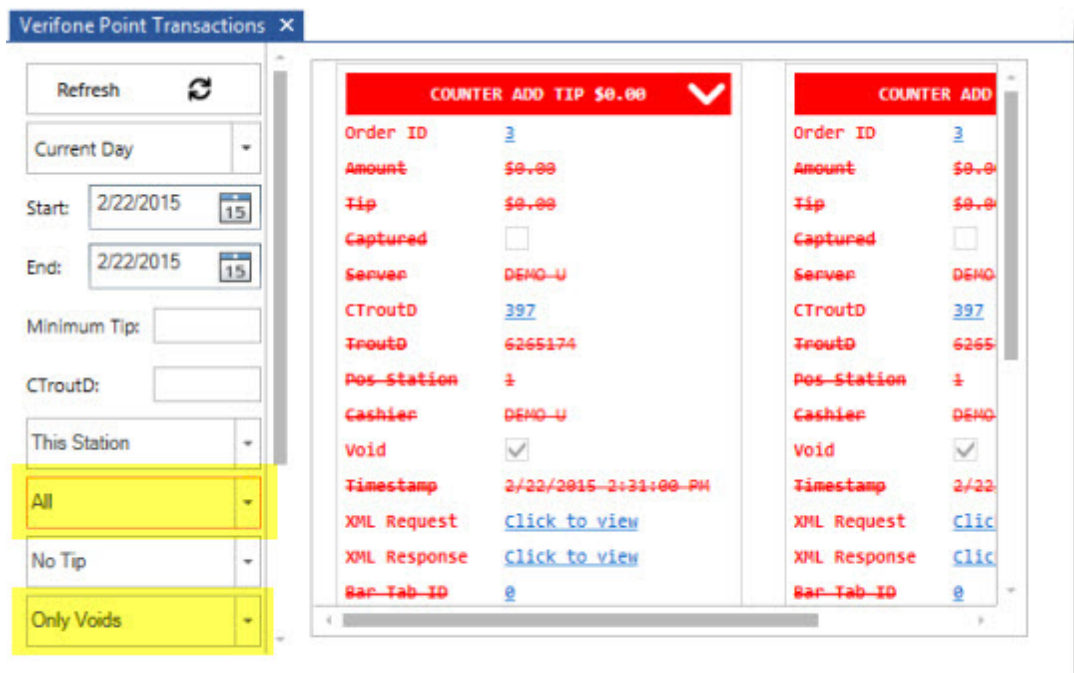
### Transaction Options

The example below displays a tip in the amount of \$5.00 being added to a Sale transaction. An error message will appear if the Tip field is non-numeric (or empty) when attempting to add the tip.



Add Tip Confirmation

Voided transactions are displayed in red text with a strike-through font. In voided transactions are shown for informational purposes only, since in most cases it is not possible to modify a voided transaction.



Voids Only Filter Applied

AmigoPOS retains raw XML for all requests sent to and responses received from the Verifone Point device. This log is useful when troubleshooting a specific transaction. Note that the XML Request and XML Response can be copied to the Windows clipboard by clicking the Copy button and later pasted into a support ticket or email.

COUNTER SALE \$10.90		BAR OPEN TAB \$25.00	
Order ID	3	<pre> &lt;RESPONSE&gt;   &lt;RESPONSE_TEXT&gt;APPROVED&lt;/RESPONSE_TEXT&gt;   &lt;RESULT&gt;APPROVED&lt;/RESULT&gt;   &lt;RESULT_CODE&gt;5&lt;/RESULT_CODE&gt;   &lt;TERMINATION_STATUS&gt;SUCCESS&lt;/TERMINATION_STATUS&gt;   &lt;TRANS_SEQ_NUM&gt;548&lt;/TRANS_SEQ_NUM&gt;   &lt;INTRN_SEQ_NUM&gt;6265419&lt;/INTRN_SEQ_NUM&gt;   &lt;TROUTD&gt;6265419&lt;/TROUTD&gt;   &lt;CTROUTD&gt;401&lt;/CTROUTD&gt;   &lt;ACCT_NUM&gt;540522*****2226&lt;/ACCT_NUM&gt;   &lt;AUTH_CODE&gt;198718&lt;/AUTH_CODE&gt;   &lt;APPROVED_AMOUNT&gt;25.00&lt;/APPROVED_AMOUNT&gt;   &lt;CARDHOLDER&gt;MC TEST&lt;/CARDHOLDER&gt;   &lt;VSP_CODE&gt;100&lt;/VSP_CODE&gt;   &lt;VSP_RESULTDESC&gt;Success&lt;/VSP_RESULTDESC&gt;   &lt;VSP_TRXID&gt;635600630769794466&lt;/VSP_TRXID&gt;   &lt;RECEIPT_DATA&gt;     &lt;RECEIPT&gt;       &lt;TEXTLINE&gt; </pre>	
Amount	\$10.90		
Tip	\$0.00		
Captured	<input checked="" type="checkbox"/>		
Server	DEMO U		
CTroutD	397		
TroutD	6265174		
Pos Station	1		
Cashier	DEMO U		
Void	<input type="checkbox"/>		
Timestamp	2/20/2015 2:18:53 PM		
XML Request	<a href="#">Click to view</a>		
XML Response	<a href="#">Click to view</a>		

XML Response

Some Vx devices are capable of prompting the customer for an email address before the card is swiped. An email can be sent by scrolling to the bottom of the transaction details and clicking the email address as shown in the image below.

Bar Tab ID @		Bar Tab ID @	
Card Details	MC XXXXX 2226	Card Details	MC XXXXX 2226
Device IP	192.168.1.7	Device IP	192.168.1.7
Device Port	5015	Device Port	5015
Cardholder	-	Cardholder	MC TEST
Archived	<input type="checkbox"/>	Archived	<input type="checkbox"/>
Response Text	MC XXXXX 2226	Response Text	MC XXXXX 2226
Result	CAPTURED	Result	CAPTURED
Result Code	4	Result Code	4
Trans Seq	582	Trans Seq	583
Phone Number	-	Phone Number	-
Email	<a href="mailto:joe@test.com">joe@test.com</a>	Email	<a href="#">@</a>
Loyalty Card	-	Loyalty Card	-

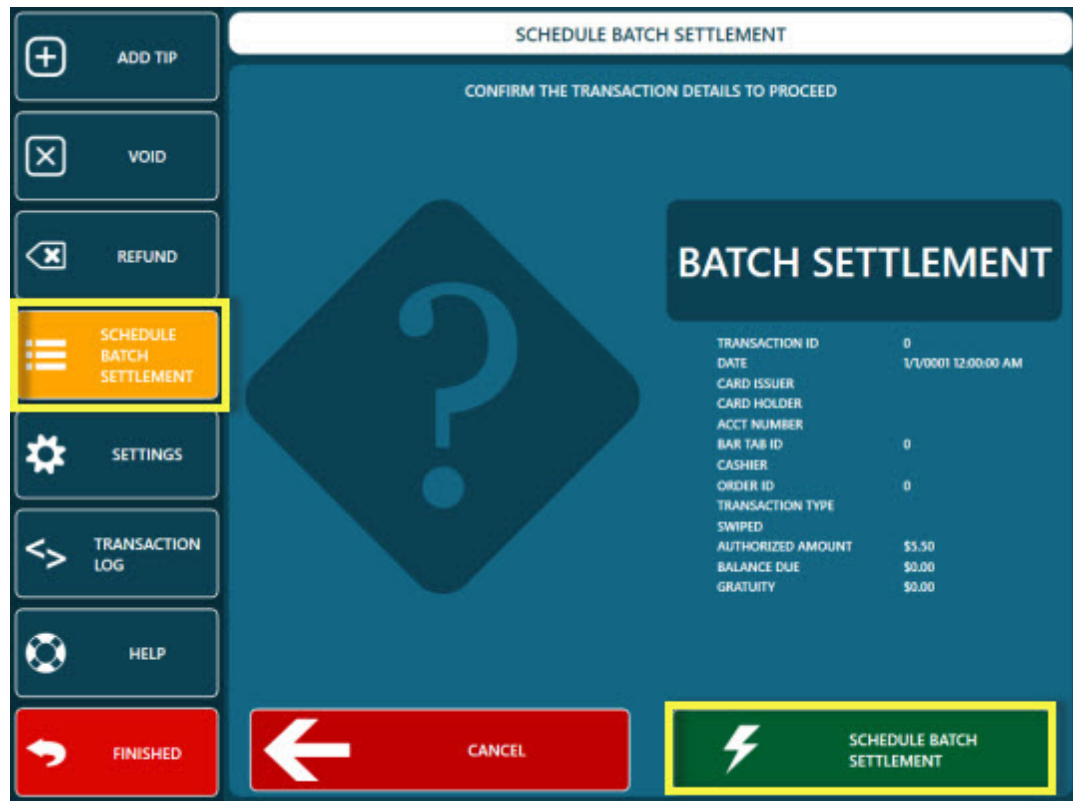
Email Link

### 10.8.8 Batch Settlement

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

Batch settlement should be set to run automatically at a predetermined time on a daily basis. Contact your Verifone Point account representative to verify the settlement time. If necessary, the batch can be manually set to run from AmigoPOS. Note that running the batch settlement command does not result in immediate batch settlement; rather, the batch is scheduled to run.

Login and press the Schedule Batch Settlement button on the Credit Cards screen.



**Schedule Batch Settlement**

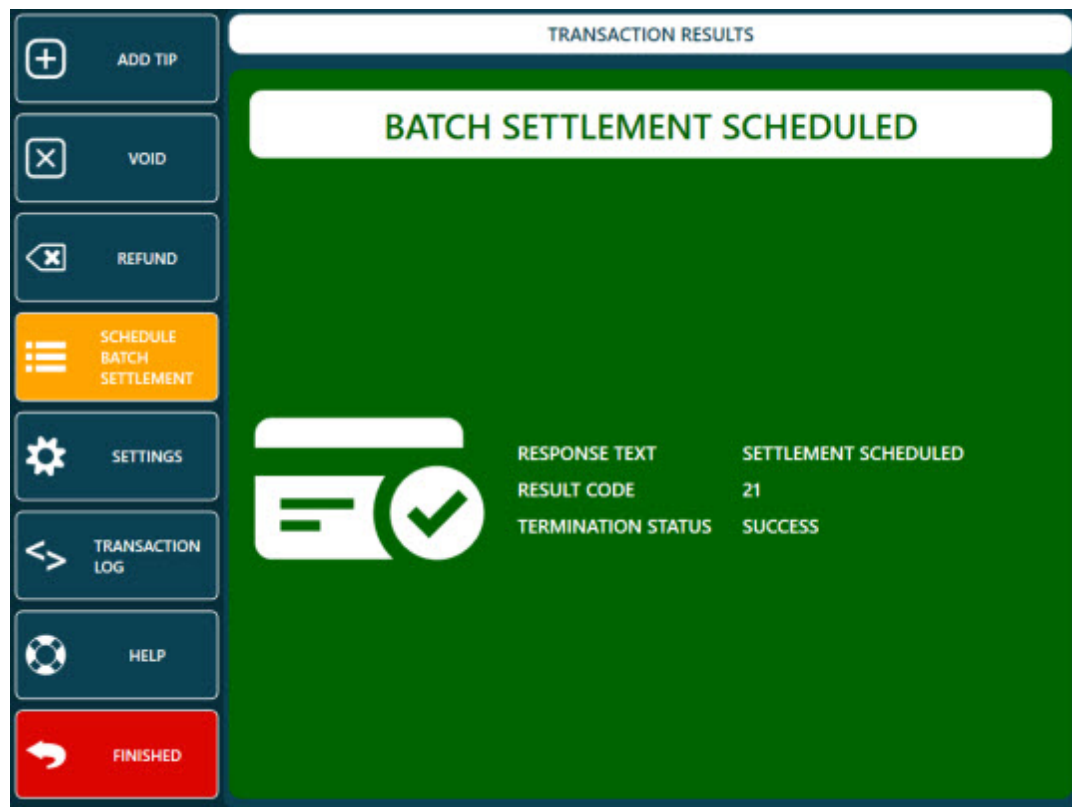
Press the green button at the bottom to send the batch settlement request to the V<sup>x</sup> device and allow a few seconds to receive a response.



#### Waiting for Device

A successful response is indicated by a green background.





Schedule Batch Settlement Response

### 10.8.9 Processor Notes

**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

The information below is current as of December 3, 2014. Contact your Verifone Point account representative for questions regarding the capabilities and restrictions of specific payment processors and V<sup>x</sup> devices.

- Contactless card support is not available for First Data Omaha or Heartland Payment Systems at this time.
- Add Tip and Reset Tip transactions are not supported by First Data Nashville ISO. To support restaurant tipping on Nashville ISO, run as a separate transaction or run a Sale for the total amount (including tip) rather than a tip-adjusted transaction.
- Debit card Refund is not supported by First Data North.
- Debit card Void is not supported by Chase Paymentech Tampa, First Data Omaha, Heartland Payment Systems, Global Payments East, or TSYS.
- Gift card Refund is not supported by Chase Paymentech Tampa - use Gift card Add Value instead.
- Private Label card transactions are currently only available for SSI based implementations.
- PAYMEDIA is currently only available for MX Solutions devices.
- When using FDMS Nashville processor, a Void cannot be issued 25 minutes after the original Sale transaction. When that amount of time has transpired, you must process the transaction as a Credit (Return). When using Vantiv processor in an SCA direct to processor' implementation, the CTROUTD is stored only for the day – after that amount of time has transpired, you must process the transaction as a Credit (Return) with the card token.
- Global Payments East, Heartland Payment Systems, Vantiv St. Pete, and TSYS only allow Add Tip on SALE (Online Capture) transactions.
- SAF applies to COMPLETION, POST\_AUTH, SALE, and CLOSE\_TAB transactions on VX Evolution devices. SAF applies to POST\_AUTH and SALE transactions on MX Solutions devices.
- Data Type D date format is MM/DD/YYYY for the DUPCHECK\_DATE request field of the Duplicate Check report (VX Evolution devices).



## 10.8.10 Troubleshooting

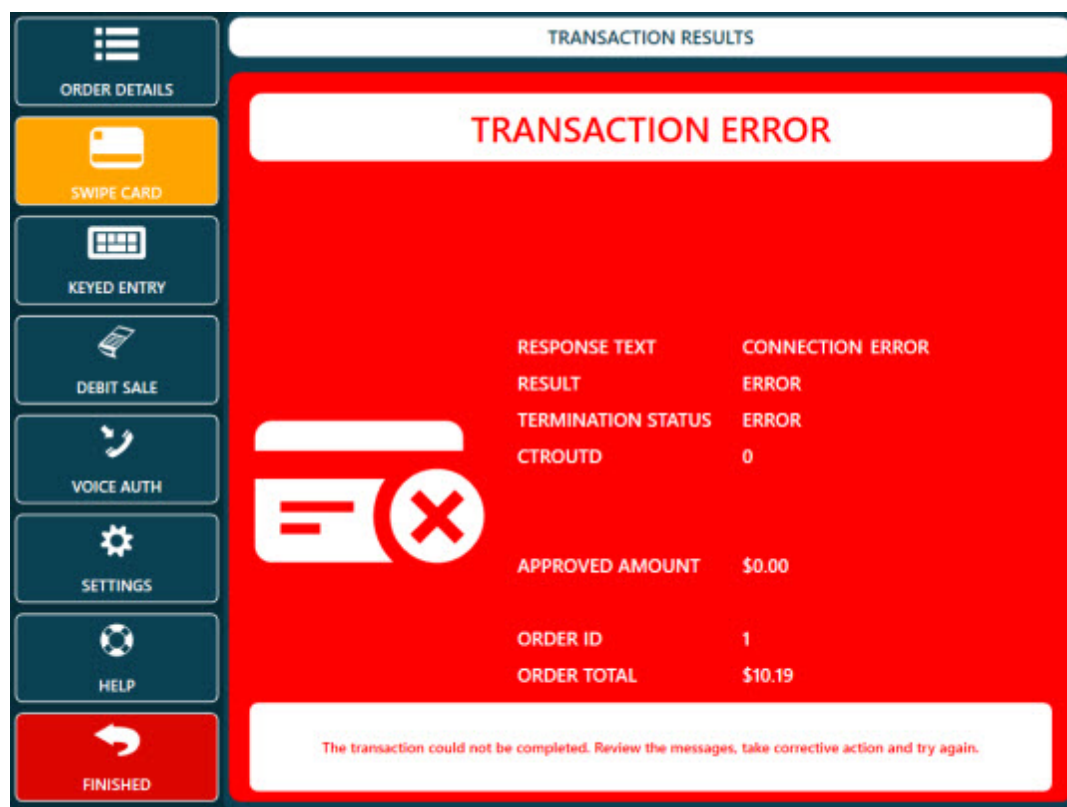
**Verifone Point is no longer recommended for AmigoPOS users due to lack of support from Verifone and ongoing technical issues. The information below is intended for current users only.**

The following are errors commonly encountered when using Verifone Point:

- [Connection error](#)<sup>522</sup>
- [POS not registered](#)<sup>523</sup>
- [Invalid MAC key/label](#)<sup>523</sup>

### Connection error

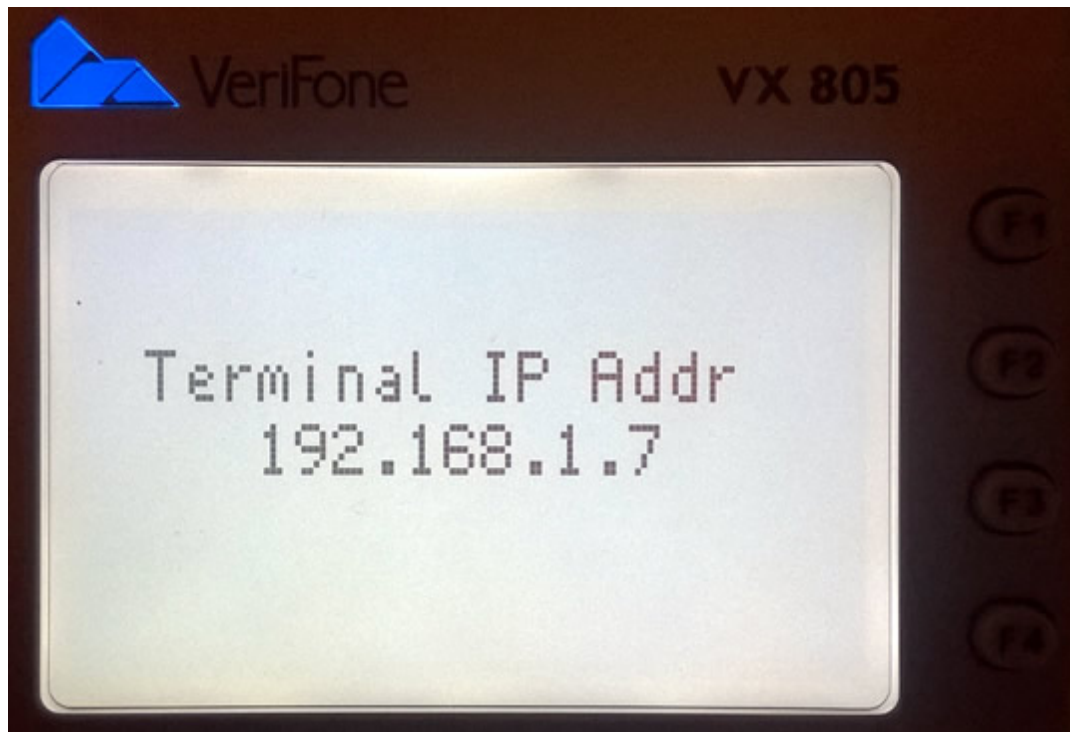
A connection error occurs when an invalid IP address is used to access the Vx device. The IP address can change if the device is set to use DHCP addressing or if the network router is reset or power cycled. Static IP addressing is recommended to prevent this issue from occurring.



Two methods are available to determine the device IP address:

1. Restart the device and note the IP address that is displayed before the welcome screen appears, as shown below
2. Connect to the network router using a web browser and view the connected devices

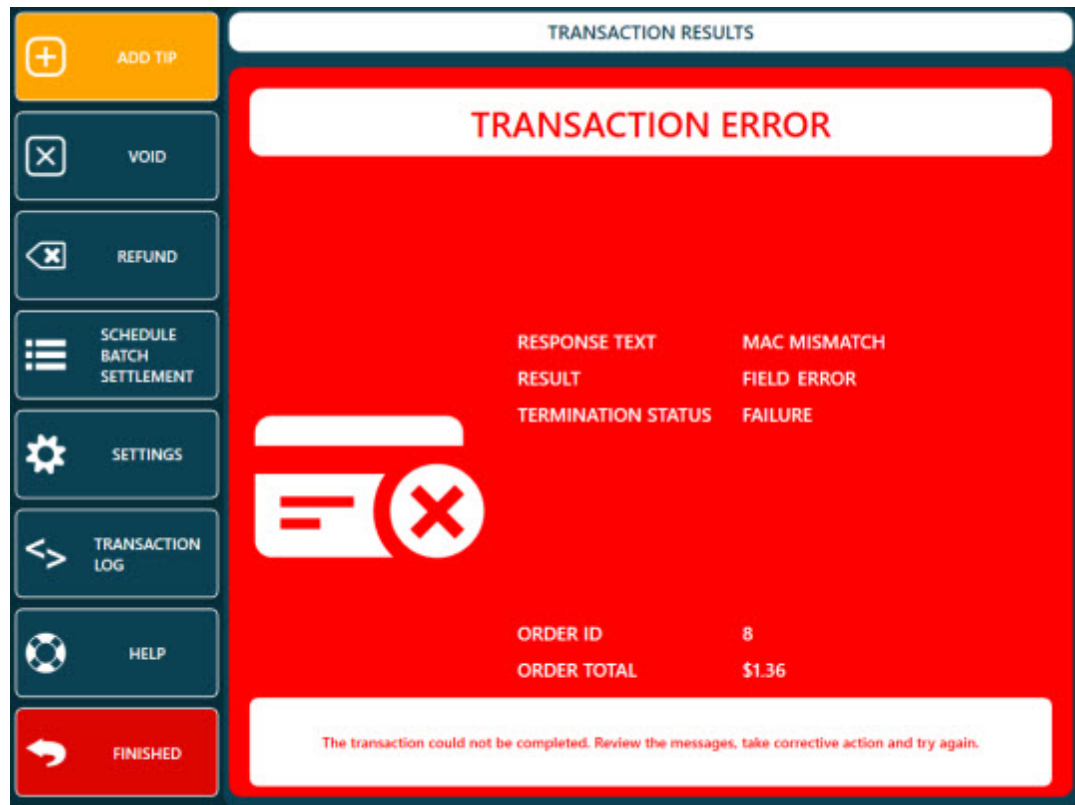
Enter the correct IP address under Settings/Set IP Address on the credit card transaction screen.

**POS not registered**

This error will occur if AmigoPOS is not registered with the device before use. Register the POS under Settings/Register on the credit card transaction screen and enter the PIN on the device.

**Invalid MAC key label**

An invalid MAC key or label error occurs if the device has been reset or the device firmware has been updated and AmigoPOS continues to use a previously generated MAC key. To correct this issue, register the POS under Settings/Register on the credit card transaction screen.



## 10.9 Processing Transactions

### Processing Credit Card Transactions in AmigoPOS using integrated processing

#### 1. Select The Payment Type

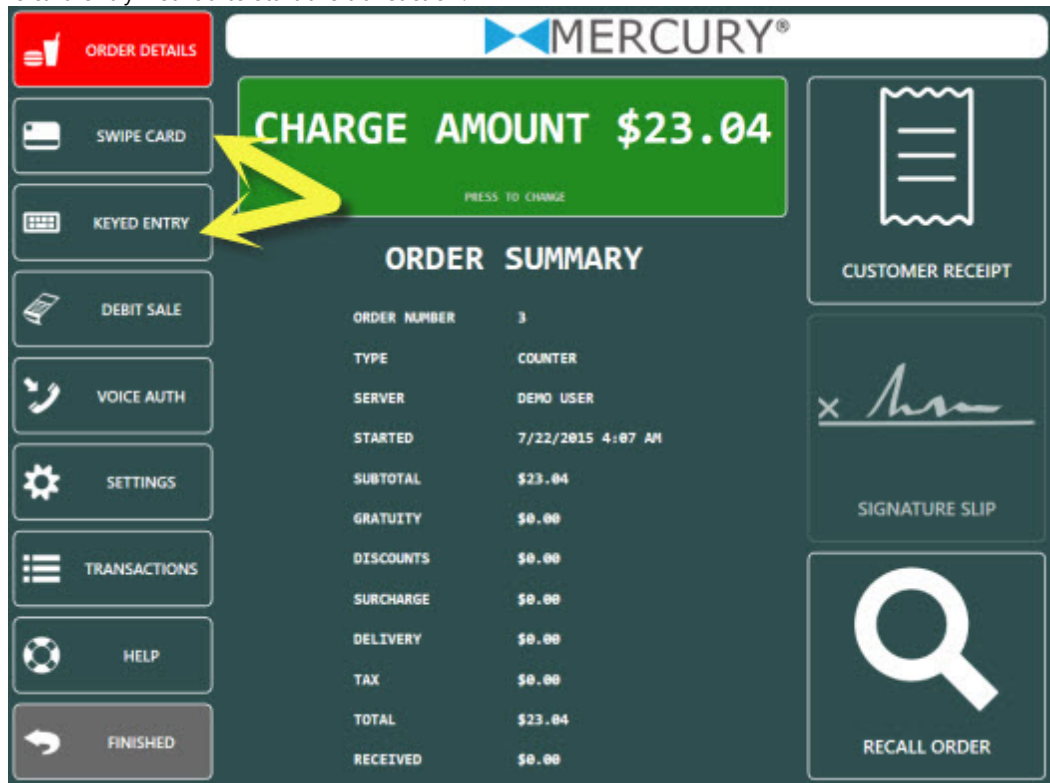
To begin a credit card transaction, select the order on the main screen and press the **SETTLE CREDIT** payment button.



Credit Card Payment Method

## 2. Select The Action

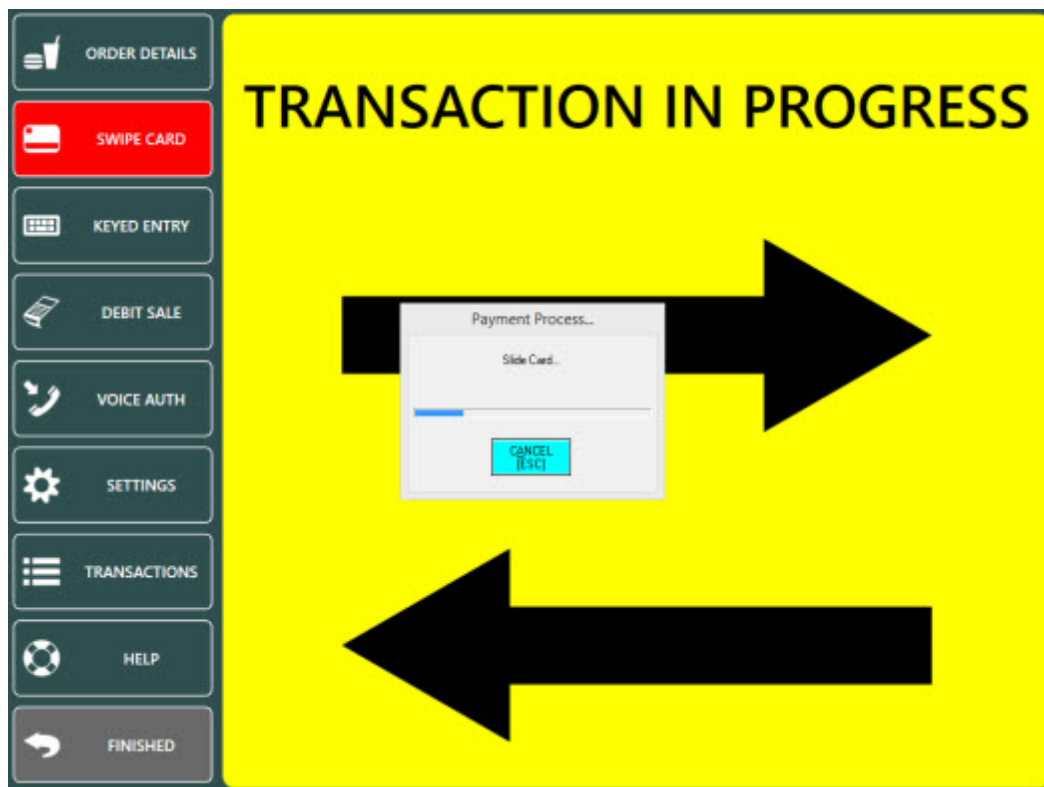
Select the card entry method to start the transaction.



Card Entry Method Selection

### 3. Swipe The Card

Swipe the customer card. If the card is swiped without an error, skip the next three steps and refer to [Waiting For The Transaction Results](#)<sup>527</sup>. If the card cannot be swiped, the card number and expiration date must be entered manually, as described below.



Waiting Card Swipe (Mercury Pay or Datacap NETePay Interface)

### 4. Enter The Card Number Manually

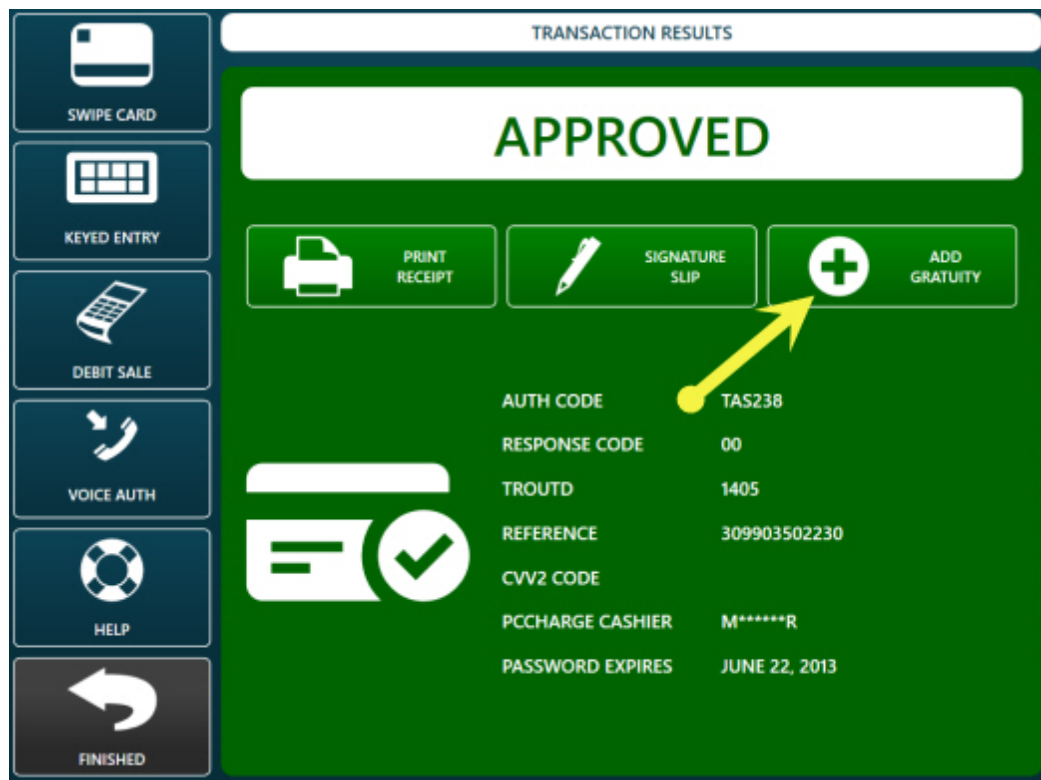
When the customer's card cannot be swiped, the number must be entered manually using the on-screen keypad. Press the **Enter Card Number Manually** button to display the keypad, enter the card number and press the **Continue** button.

MANUAL CARD ENTRY		
SWIPE CARD KEYED ENTRY DEBIT SALE VOICE AUTH HELP FINISHED	ENTER THE CARD NUMBER	<div>1 JAN 2013</div> <div>2 FEB 2014</div> <div>3 MAR 2015</div> <div>4 APR 2016</div> <div>5 MAY 2017</div> <div>6 JUN 2018</div> <div>7 JUL 2019</div> <div>8 AUG 2020</div> <div>9 SEP 2021</div> <div>10 OCT 2022</div> <div>11 NOV 2023</div> <div>12 DEC 2024</div>
	<input type="text"/> CANCEL MANUAL CARD ENTRY	
	<div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>0</div> <div>▶</div>	

Keyed Entry Screen

### 5. Waiting For The Transaction Results

AmigoPOS will send the transaction request to the payment processor. The time remaining before a timeout error occurs is displayed on screen. If using IP processing, the transaction should be completed in under 10 seconds. Dial-up processing can take over 1 minute. If a timeout error occurs, a red error screen will appear. A timeout error most likely indicates that a local network or internet disruption has occurred. AmigoPOS will display a successful transaction with a green background, an unsuccessful transaction with a red background, and a duplicate or partial auth transaction with a yellow background. The transaction can be immediately captured or adjusted by pressing the Add Tip (or Capture) button.

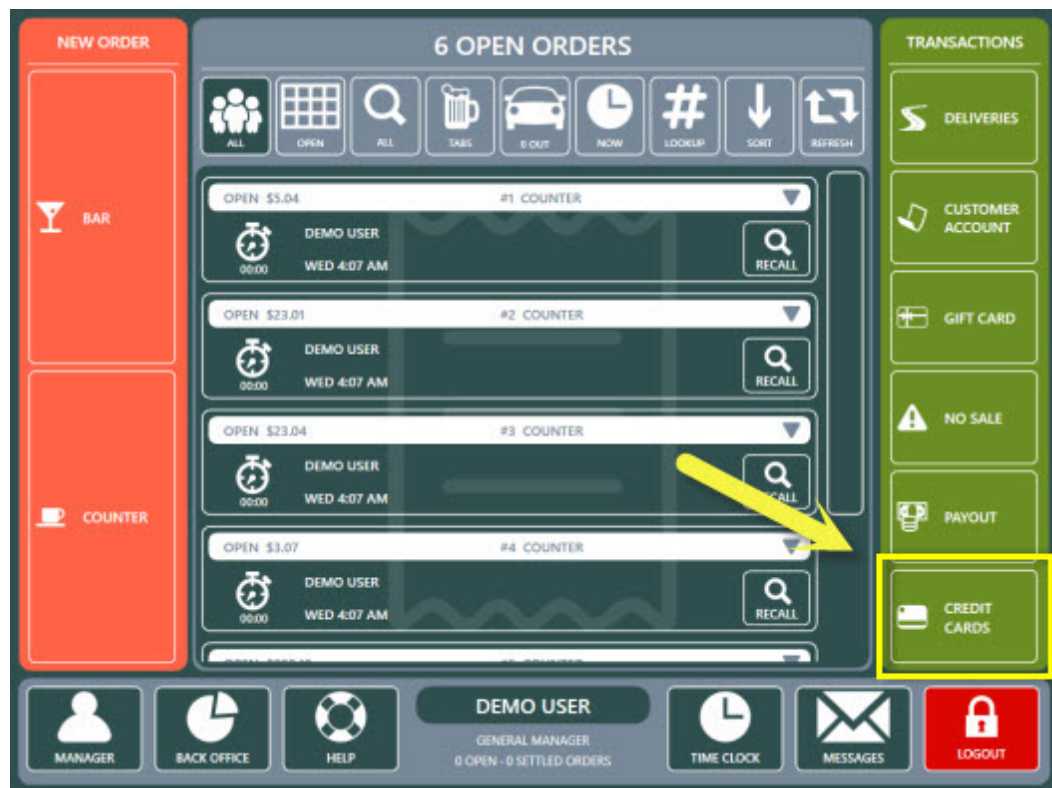


Transaction Results

#### 6. Completing The Transaction

**Note that every Pre-Authorized transaction must be captured, even if the gratuity is zero.**

To add a gratuity, press the **ADD GRATUITY** button. If the ADD GRATUITY button is not visible, press the down arrow under the transactions button group until the ADD GRATUITY button appears.



**Credit Card Transactions**

The Transaction ID can be found at the top of the signature slip, directly under the transaction type.



MY RESTAURANT  
1 MAIN STREET  
SOUTH PARK, CO

CREDIT CARD SALE

Transaction Id: 74

Result: CAPTURED  
Date: 07/16/10  
Time: 22:56:16  
Authorization: AXS117  
Reference: 019802501902  
Seq ID: 1064  
TRoutD: 1064  
Server: Mel S.  
Cashier: Mel S.  
Order ID: 69  
Account: XXXXXXXXXXXXXXX01  
Entry Type: SWIPED  
Card Issuer: AMEX  
Card Member: MPS TEST  
Exp Date: XX/XX  
Amount: 1.35

Gratuity: \$. . . . .

Total: \$. . . . .

Signature:  
X. . . . .

I agree to pay the above total according  
to the card issuer agreement

OPEN 24 HOURS  
THANK YOU! COME AGAIN

Signature Slip Transaction ID Line

Select the transaction or enter the transaction id using the on-screen number pad and press the green button to continue.



Select the Transaction or enter the Transaction ID

Enter the gratuity amount and press the **ADD GRATUITY** button to complete the transaction.

The screenshot shows the 'ENTER THE GRATUITY AMOUNT' screen in the AmigoPOS 8 application. The interface includes a numeric keypad with buttons for digits 0 through 9, a green 'ENTER' button, and a 'CANCEL' button. On the left side, there is a vertical menu with buttons for 'ADD GRATUITY', 'VOID', 'REFUND', 'VOID REFUND', 'TRANSACTION LOG', 'HELP', and 'FINISHED'. The top of the screen has a title bar and a text input field for the gratuity amount.

Enter the gratuity amount

## 7. Confirmation

When viewing orders after pressing the Settle button on the start screen, orders that have been pre authorized but not yet captured appear with a red button. Ensure that all pre-authorized transactions have been captured before the [End of Day](#)<sup>[643]</sup> procedure is performed. The setting that prevents running the End of Day if open PreAuth transactions exist will ensure that a gratuity is added to each PreAuth in the current batch before the End of Day can be run. The **Confirm End of Day** button remains disabled until all open PreAuth transactions have been captured.

**Any Pre-Authorized transaction that is not captured will not be added to the batch and will become invalid after a period of time determined by the payment processor (generally less than a week).**

CASH  
DRAWERS

END OF  
DAY

REPORTS

CASH  
DROPS

EMPLOYEE  
BANKING

SHUT  
DOWN

FINISHED

END OF DAY

My Restaurant  
600 Biscayne Blvd  
Miami, FL 33130  
111-222-3333

---

END OF DAY REPORT  
4/8/2013 11:18:29 PM

---

TRANSACTIONS SUMMARY

CREDIT CARD(6)	\$30.90
MANUAL CREDIT(5)	\$26.59
=====	
	\$57.49

TAX COLLECTED

SALES SUBTOTAL	\$111.00
TAX	\$8.81
=====	
	\$120.41

SALES BY ORDER TYPE SUMMARY

BAR(8)	\$45.56
COUNTER(7)	\$40.00
DELIVERY(3)	\$22.06
PICK-UP(2)	\$11.88
=====	
	\$120.41

SUBTOTAL BY ITEM TYPE

Regular (31)	\$56.05
Bar (15)	\$41.80
Regular Modifier (8)	\$0.00
=====	
	\$97.85

CURRENT DAY - ALL POS STATIONS

LAST END OF DAY	NEVER
OPEN ORDERS COUNT	10
OPEN ORDERS TOTAL	\$54.66
OPEN PREAUTH COUNT	1
SETTLED ORDERS COUNT	10
TRANSACTIONS COUNT	11
VOIDS COUNT	0
VOIDS TOTAL	\$0.00
SUBTOTAL	\$53.20
TAX	\$4.29
=====	
DISCOUNTS	(-) \$0.00
CASH PAID OUT	(-) \$0.00
DELIVERY CHARGES	\$8.25
GRATUITIES	\$0.00
SURCHARGES	\$0.00
=====	
<b>GRAND TOTAL</b>	<b>\$65.74</b>

**END OF DAY DISABLED**

→CAPTURE 1 OPEN PREAUTH

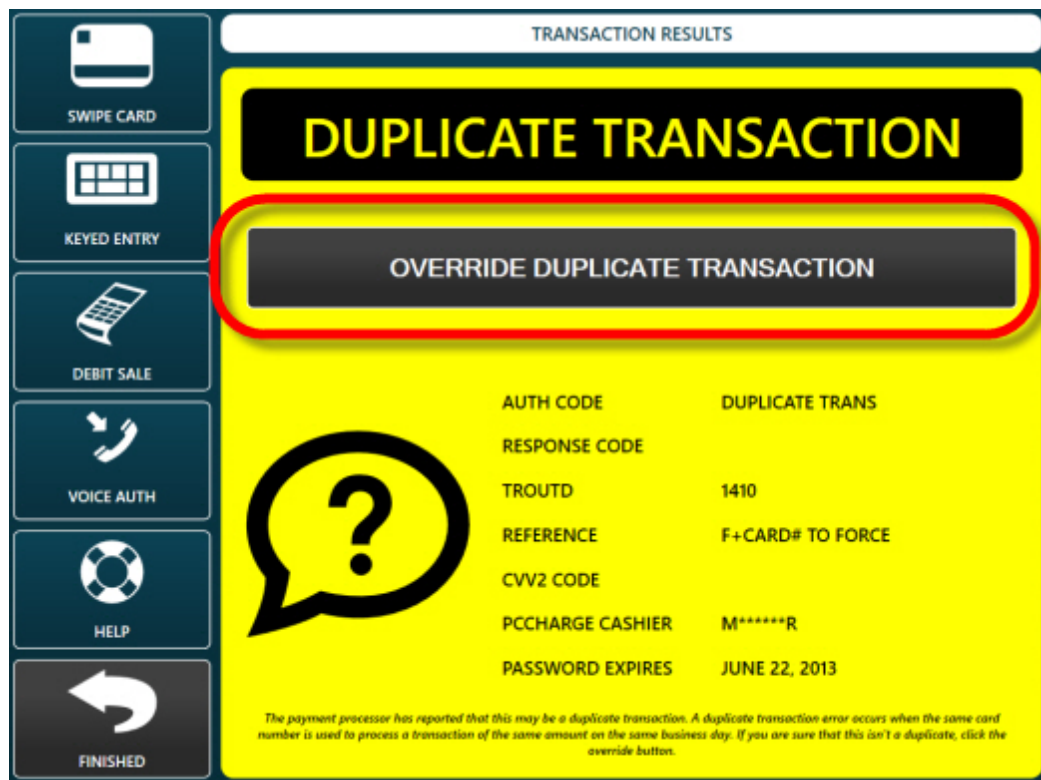
→SETTLE 10 OPEN ORDERS

PRINT

Manager End Of Day Disabled

### 8. Duplicate Transaction Alert

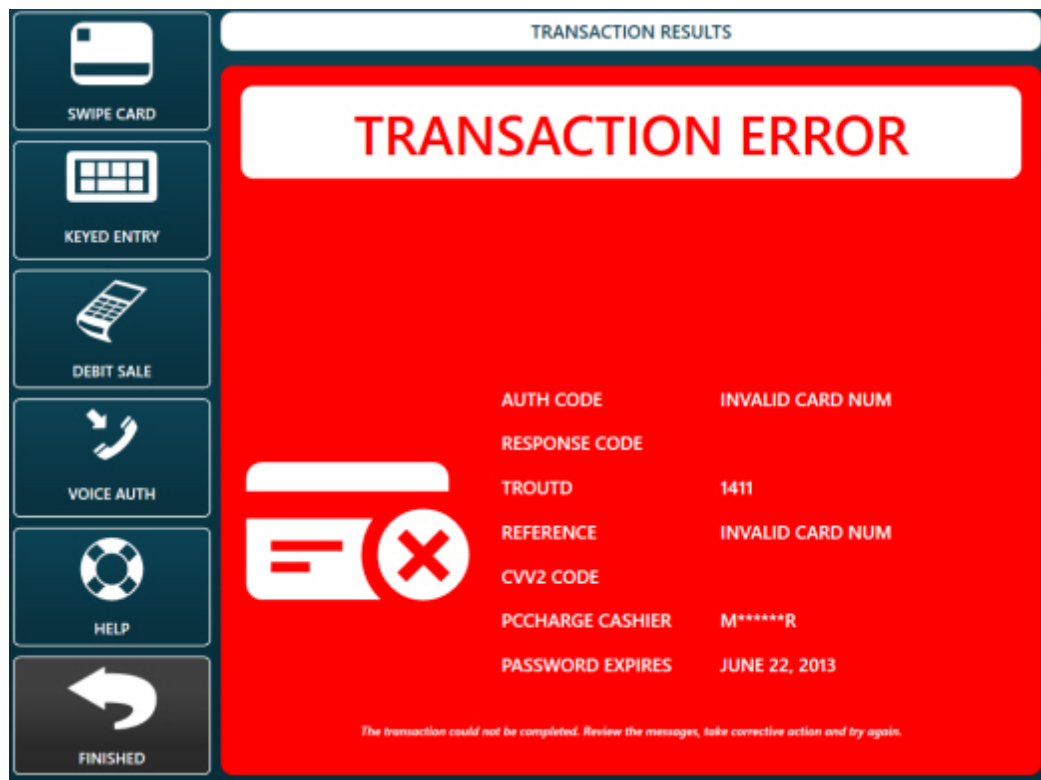
When processing a Sale transaction on the same card for the same amount on the same business day, the payment processor may return a 'Duplicate Transaction' message to alert the user that a duplicate transaction already exists in the batch. After confirming that it isn't a duplicate transaction, press the **OVERRIDE DUPE** button. Otherwise, press the **CANCEL** button to return to the order details.



**Duplicate Transaction Alert**

### 9. General Transaction Error

Any response received from the payment processor that indicates an error condition will appear on a red background to alert the user that an error has occurred. Review the error description and take appropriate action before retrying the transaction. Common errors include invalid card number, expired card, bad swipe, or transaction declined.

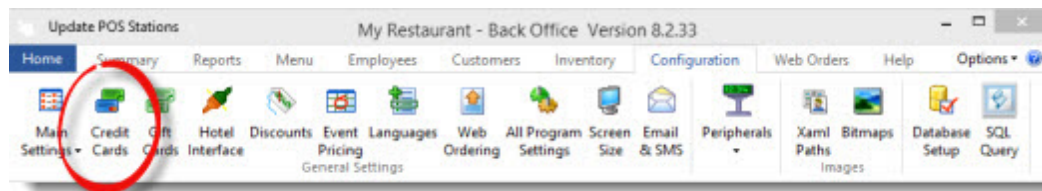


General Transaction Error

## 10.10 Signature Slip Settings

Credit card signature slips are printed automatically if the value of Print Signature Slips is set to Merchant, Customer or Both. Signature slips are printed as follows:

- Sale or Preauth transaction will print a signature slip(s) for the credit card pre-authorization or credit card sale. The signature slip can be reprinted by pressing the "Reprint Signature Slip" button on the transaction results screen.
- Capture or Add Gratuity transaction will not print the signature slip automatically. The capture or add gratuity signature slip can be reprinted by pressing the "Print Signature Slip" button on the transaction results screen.
- **Back Office > Summary > Credit Cards** also allows the signature slip to be reprinted. In the case, selecting any credit card transaction will print all preauth and postauth signature slips for the associated order id, regardless of how many credit card transactions are processed for the order.
- The close bar tab screen also allows the user to manually print the preauth signature slip when the customer is ready to settle the bar tab.



Back Office &gt; Configuration &gt; Credit Cards

**CREDIT CARD SETTINGS**

- Transaction Options (apply To this station only)
- Signature Slip Settings (apply To all pos stations)
 

Signature Slip Disclaimer 1	I agree to pay the above total according
Signature Slip Disclaimer 2	to the card issuer agreement
Signature Slip Disclaimer 3	
Signature Line Minimum	0
Require Manual Credit Auth Code	No
Signature Slip Bar Tab Name	Yes
Signature Slip Print Auth Number	Yes
Signature Slip Print Bitmap Logo	No
Signature Slip Print Card Issuer	Yes
Signature Slip Print Card Member	Yes
Signature Slip Print Card Number	Yes
Signature Slip Print Cashier Name	Yes
Signature Slip Print Date	Yes

Signature Slip Disclaimer 1  
Text to print immediately below signature line on the credit card signature slip - leave blank to omit

Signature Slip Configuration

### Customizing AmigoPOS Signature Slips

AmigoPOS offers the option to customize the signature slip line-by-line. Navigate to Back Office/Settings/ Main Settings/Credit Cards and expand the Signature Slips settings. The following settings are available:

- **Signature Line Minimum:** this value is used to determine the minimum order amount before a gratuity line and signature line is printed at the bottom of the signature slip. Set to zero to always print. Note that some payment processors require a signature regardless of the transaction amount.
- **Signature Slip Print Auth Number:** set to Yes to print the authorization number on the signature slip
- **Signature Slip Print Card Issuer:** set to Yes to print the card issuer (Visa, MasterCard, etc) on the signature slip
- **Signature Slip Print Card Member:** set to Yes to print the cardholder's name on the signature slip
- **Signature Slip Print Card Number:** set to Yes to print the last 4 digits of the card number on the signature slip
- **Signature Slip Print Date:** set to Yes to print the transaction date on the signature slip
- **Signature Slip Print Expiration Date:** set to Yes to print the transaction time on the signature slip
- **Signature Slip Print Reference Number:** set to Yes to print the reference number on the signature slip
- **Signature Slip Print Result:** set to Yes to print the transaction result (Captured, Processed, etc) on the signature slip
- **Signature Slip Print Sequence Number:** set to Yes to print the secondary TroutD number on the signature slip
- **Signature Slip Print Swipe Type:** set to Yes to print the swipe method (swiped or manual entry) on the signature slip

- **Signature Slip Print Table Name:** set to Yes to print the table name (from seating chart) on the signature slip
- **Signature Slip Print order Number:** set to Yes to print the order id on the signature slip
- **Signature Slip Print Time:** set to Yes to print the transaction time on the signature slip
- **Signature Slip Print Transaction:** set to Yes to print the transaction id on the signature slip
- **Signature Slip Print Transaction Type:** set to Yes to print the transaction type on the signature slip
- **Signature Slip Print TroutD:** set to Yes to print the TroutD on the signature slip
- **Signature Slip Print User Name:** set to Yes to print the server's name on the signature slip
- **Signature Slip Print Gratuity Suggestions:** set to Yes to print gratuity suggestions at the bottom of a preauth or sale signature slip. This setting applies only when both the gratuity line and the signature line are printed.

## 10.11 Printing Signature Slips

Signature slips can be reprinted on the credit cards screen by entering the transaction id or selecting the transaction from the list.

**CREDIT CARD SIGNATURE SLIP**

CONFIRM THE TRANSACTION DETAILS TO PROCEED

**SIGNATURE SLIP**

TRANSACTION ID	18
DATE	9/8/2015 2:14:55 PM
CARD ISSUER	AMEX
CARD HOLDER	
ACCT NUMBER	XXXXXXXXXXXX8431
BAR TAB ID	@
CASHIER	
ORDER ID	18
TRANSACTION TYPE	SALE
SHIPPED	YES
AUTHORIZED AMOUNT	\$1.69
BALANCE DUE	\$0.00
GRATUITY	\$0.00

**PRINT SIGNATURE SLIP**

Reprint Signature Slip



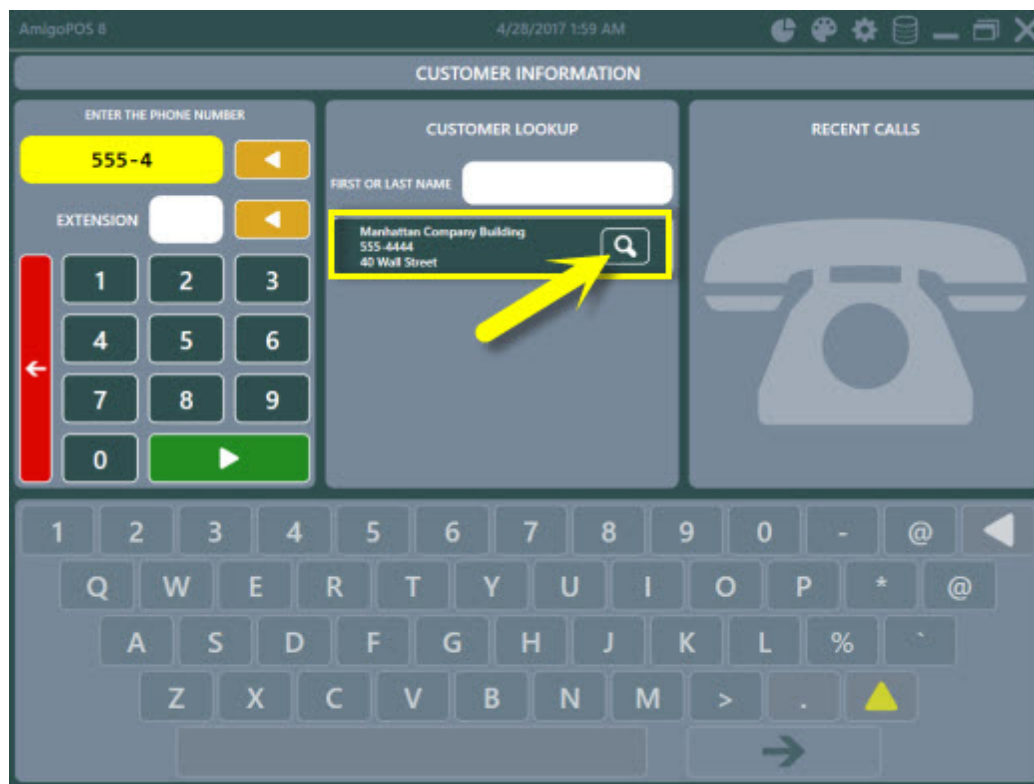
Part 11

# Customers

## 11 Customers

### 11.1 Overview

The pos can track customers by phone number for delivery and pickup orders. Customers can be assigned multiple addresses, and each address is assigned a separate delivery zone. In addition, each customer account requires a valid customer. Start a new delivery or pickup order and enter the customer phone number. The pos will automatically begin searching the database for a partial match after the fourth digit is entered and the results are displayed in the center column. Click the outer button to start a new order or click the edit button to edit the customer details.



**The customer information screen is used to edit customer details such as the address, phone number and delivery zone. In addition, the**

AmigoPOS 8 4/28/2017 2:03 AM

**CUSTOMER INFORMATION**

Manhattan Company Building

PHONE 555-4444

FIRST ORDER 4/28/2017

ORDERS 0

TOTAL \$0.00

AVERAGE \$0.00

Primary 555-4444 North

LAST NAME Manhattan Company Bui FIRST NAME

ADDRESS 40 Hall Street

ADDRESS 2

CITY/STATE/ZIP New York NY 10005

NOTES

EMAIL cosmo@amigopos.com TAXABLE

CANCEL ORDERS LOYALTY ACCOUNT ROUTE MAP CONTINUE

1 2 3 4 5 6 7 8 9 0 - @

Q W E R T Y U I O P \* @

A S D F G H J K L % `

Z X C V B N M > .

→

## 11.2 Customer Email

The customer email utility is intended to send bulk emails based on customizable HTML templates to one or more recipients.

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS INVENTORY SETTINGS HELP

Customers Customer Accounts Invoice Email Mailing Labels ID Log

Customers

0 Orders | \$0.00 Since Last End of Day

Email Client

Recipient(s):

Subject: Email subject

Attachments:

Body: Blank Page

**Daily Specials**

Today's specials are...

Type: mailto: (individual)

email update save new cancel

- [SMTP Server Settings](#) <sup>541</sup>
- [HTML Templates](#) <sup>541</sup>
- [Email List](#) <sup>541</sup>
- [Filters](#) <sup>542</sup>

- [Message Type](#) <sup>543</sup>

### SMTP Server Settings

Verify that the email [smtp server settings](#) <sup>976</sup> are correct in **Back Office>Settings>Email**.

### HTML Templates

Templates are used to store messages for future use. Click **Update** to commit any unsaved changes or Save New to store a new email template.

Body: Blank Page

Daily S

Today's specials are...

Segoe UI 13 A<sup>+</sup> A<sup>-</sup>

**B** *I* u **A**

send update save new cancel

Click Delete to permanently remove the template from the list. At least one email template is required and the delete button is visible only if more than one email template exists.

Body: Test Template

Daily Specials

Today's specials are...

Upcoming features include the use of tokens that can be used to automatically insert the customer's name, loyalty card status and other personalized features.

### Email List

Customer emails are collected on the customer information screen in the pos when starting a new order.

Emails for one-time use can be added to the list by clicking the icon and entering a valid email address. The email is not saved to the database.

Upcoming features include the ability to collect emails from a credit card terminal including Datacap NETePay compatible EMV devices such as the devices listed at <http://www.datacapsystems.com/emv-transition>.

### Filters

Filters are used to narrow the recipients list based on any of the following criterion. The default setting for each field is "All" so that all customer emails are matched. Each field can be set to greater than, less than or equal to filter the list.

- **Customer Since:** The date of the customer's first order
- **Last Order:** The date of the customer's most recent order




- **Total Spent:** The cumulative total of the customer's orders (not including voids)
- **Order Count:** The number of orders place (not including voids)
- **Average Order:** The average amount per order (not including voids)
- **Minimum Order:** The minimum order amount (not including voids)
- **Maximum Order:** The maximum order amount (not including voids)
- **Loyalty Bonus:** The cumulative total of the customer's loyalty points

The screenshot shows the 'Email Client' window. On the left, under 'Recipient(s):', there is a list of seven recipients, each with a checked checkbox and a yellow flag icon. The recipients are: Broad Exchange Building (pc@amigopos.com), City Hall (pearl@amigopos.com), Delmonico Building (linus@amigopos.com), Forward Building (elmer@amigopos.com), Manhattan Company Building (cosmo@amigopos.com), Municipal Building (henry@amigopos.com), and Pier A (aue@amigopos.com). Below the list, the 'Type:' dropdown is set to 'mailto: (individual)'. On the right, there is a summary section with the following fields: 'Customer Since' (All, 9/11/2016), 'Last Order' (All, 9/11/2016), 'Total Spent' (All, 0.00), 'Order Count' (All, 0), 'Average Order' (All, 0.00), 'Minimum Order' (All, 0.00), 'Maximum Order' (All, 0), and 'Loyalty Bonus' (All, 0). Each field has a dropdown menu set to 'All' and a value field.

### Message Type

Many providers place limits on the number of outgoing messages. The email client can be configured to send emails using any of the following:

- **mailto: (individual):** An individual email is sent to each recipient. This method does not allow each recipient to view other recipients.
- **mailto: (combined):** All recipients are combined and a single email is sent. This method allows each recipient to view all other recipients.
- **cc:** The message is sent to the default "from address" specified in the [email settings](#)<sup>[976]</sup> and all recipients are listed in the cc: field. This method allows each recipient to view all other recipients.
- **bcc:** The message is sent to the default "from address" specified in the [email settings](#)<sup>[976]</sup> and all recipients are listed in the bcc: field. This method does not allow each recipient to view other recipients.

Recipient(s):    Subject:

☒ Broad Exchange Building  
pc@amigopos.com

☒ City Hall  
pearl@amigopos.com

☒ Delmonico Building  
linus@amigopos.com

☒ Forward Building  
elmer@amigopos.com

☒ Manhattan Company Building  
cosmo@amigopos.com

☒ Municipality  
henry@amigopos.com

☒ Pier A  
aus@amigopos.com

Attachments:

Body:

**Daily Specials**

Today's specials are...

Type:

**DEMO USER** HTML Template Saved

Part 12

# Customer Accounts



## 12 Customer Accounts

### 12.1 Configuration

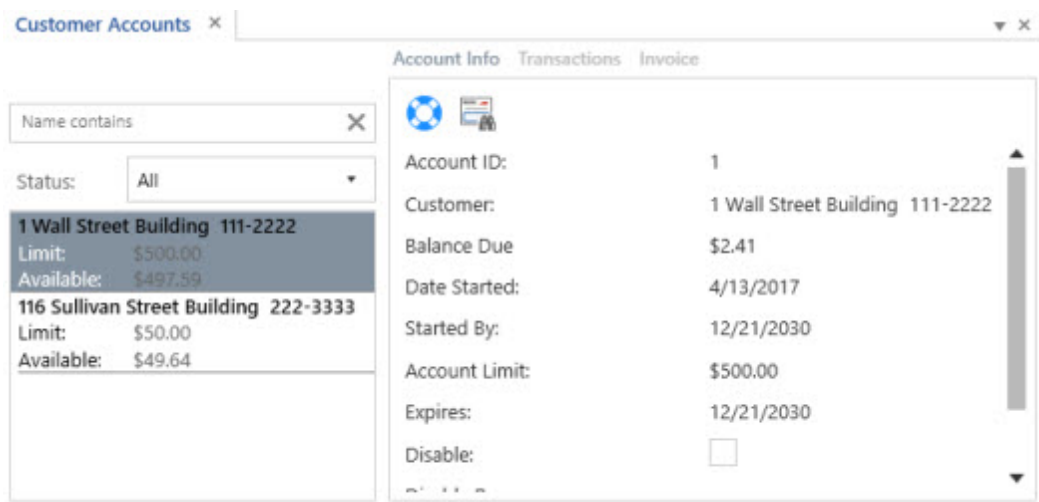
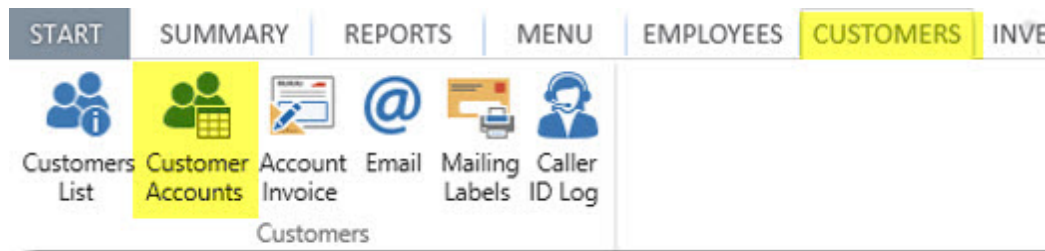
Customer account cards can be used for easier and more secure customer account transaction processing. Standard magnetic swipe and barcodes are supported.

A list of current house accounts is available in **Back Office>Customers>Customer Accounts**. Some columns are read-only to prevent errors. The following columns can be edited as required:

- **Account Limit:** There is no maximum for the account limit. Note that setting the value to zero effectively disables the house account
- **Expires:** Click within the field to display a pop-up calendar
- **Card Number:** When using card swipe or barcode, enter the numeric value without start or end sentinels
- **Void:** The house account can be disabled by checking the box
- **Void Reason:** Optionally add a text memo with the reason that the house account is disabled

The summary for any house account can be printed by highlighting the row and selecting **Print Selected Customer Account Summary** from the drop-down list. The summary is formatted for thermal receipt printers. A house account can be deleted by selecting Delete Selected Customer Account from the drop-down list. To prevent errors, only house accounts with no active transactions can be deleted. Each individual transactions must be voided or deleted before deleting the house account.

A new house account can be added by selecting a customer from the drop-down list and then clicking **New**. If using swipe card or barcode, swipe or scan the card to automatically insert the card number; otherwise enter the card number manually or leave the field blank.



Customer Accounts List

A list of house account transactions grouped by customer is available by clicking the **Transactions** tab. Any transaction can be voided by checking the box and pressing the enter key. A transaction can be permanently deleted by highlighting the row and selecting **Delete Selected Transaction** from the drop-down list. The summary for any house account can be printed by highlighting any of the house account transactions and then selecting **Print Selected Customer Account Summary** from the drop-down list. The summary is formatted for thermal receipt printers.

The screenshot shows the 'Customer Accounts' window with the 'Transactions' tab selected. On the left, a list of accounts is shown, with '1 Wall Street Building 111-2222' selected. The main area displays transaction details for the selected account, including a balance due of \$2.41 and a list of transactions: a sale of \$4.41 and a payment of \$2.00. Each transaction has a 'Void' and 'Delete' button.

Account Name	Limit	Available
1 Wall Street Building 111-2222	\$500.00	\$497.59
116 Sullivan Street Building 222-3333	\$50.00	\$49.64

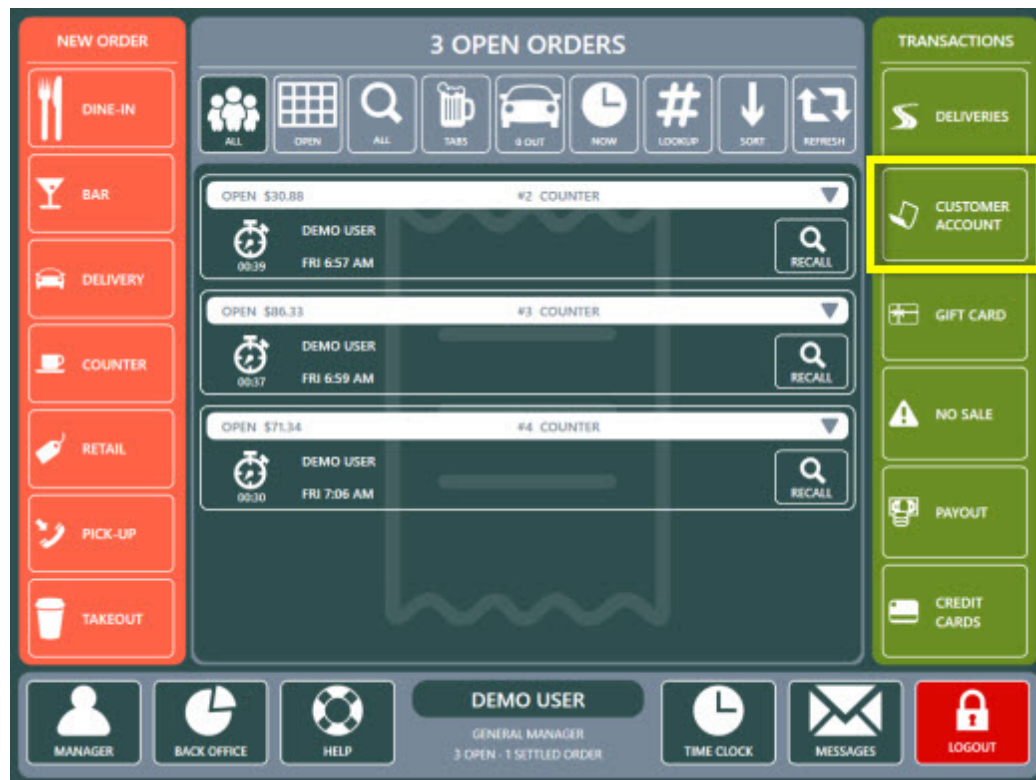
  

Transaction ID	Description	Amount	Date/Time	User	Order #	Actions
<b>BALANCE DUE \$2.41</b>						
#1	Sale	\$4.41	4/13/2017 09:30	Cashier	Order #1	Void, Delete
#2	Payment	\$2.00	4/13/2017 09:30	Cashier DEMO USER	Order #2	Void, Delete

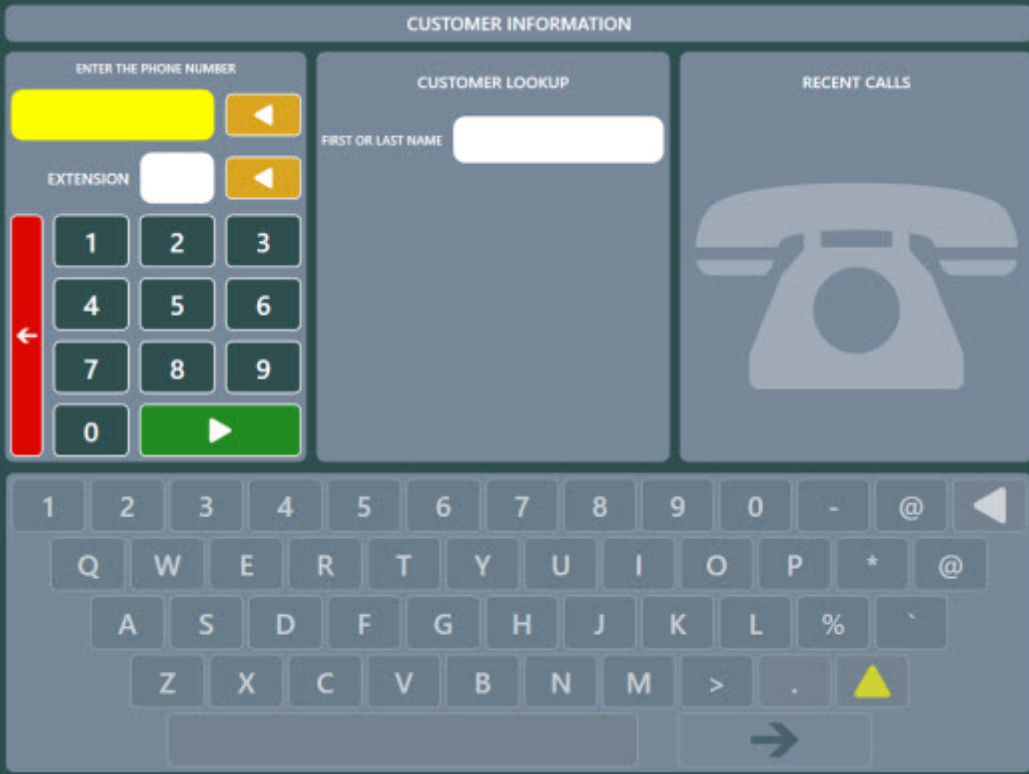
House Account Transactions

## 12.2 New Customer Account

To start a new house account or accept payment on an existing house account, press the **CUSTOMER ACCOUNT** button in the Settle button group on the right side of the main screen. If the button is not visible, edit the start screen transaction type button [settings](#) to enable the Customer Accounts button.



Press the **NEW CUSTOMER ACCOUNT** button or the **MAKE PAYMENT** button to continue. This step can be skipped if using a swipe card or barcode. Swiping a card with a card number that does not appear in the house accounts list will automatically display the New Customer Account screen. Swiping a card with a card number that is already associated with a house account will display the Customer Account Payment Screen.



The image shows a software interface titled "CUSTOMER INFORMATION". It is divided into three main sections: "ENTER THE PHONE NUMBER", "CUSTOMER LOOKUP", and "RECENT CALLS".

- ENTER THE PHONE NUMBER:** This section contains a yellow input field for the main number, an orange back arrow button, a white input field for the "EXTENSION", another orange back arrow button, a numeric keypad (0-9), a red vertical bar with a white left arrow, and a green forward arrow button.
- CUSTOMER LOOKUP:** This section has a label "FIRST OR LAST NAME" followed by a white input field.
- RECENT CALLS:** This section features a large, light blue icon of a rotary telephone.

At the bottom of the screen is a full QWERTY keyboard. The right side of the keyboard includes a yellow up arrow button and a large green right arrow button.

**Customer Management Screen**

If starting a new house account, enter the account limit, select the customer and press the **PROCESS** button. If making a payment, select the customer, enter the payment amount and press the **PROCESS** button.

**CUSTOMER INFORMATION**

**1 Wall Street Building**

PHONE 111-2222

FIRST ORDER 9/25/2015

LAST ORDER 9/25/2015

ORDERS 0

TOTAL \$0.00

AVERAGE \$0.00

Primary 111-2222

North End \$2.20 (\$25.00 FREE)

LAST NAME **1 Wall Street Building** FIRST NAME

ADDRESS 1 Wall Street

ADDRESS 2

CITY/STATE/ZIP New York NY 10005

DISTANCE 5.1 mi / 19 mins

NOTES

EMAIL louis@amigopos.com TAXABLE

**SELECT THE ACCOUNT LIMIT TO START A NEW ACCOUNT**

\$20.00 \$50.00

\$100.00 \$500.00

**New Customer Account**

When starting a new customer account, the customers list displays all customers in alphabetical order. Note that the account number shown after the name is the customer id, not a customer account id. When making a payment, the number shown after the customer name is the customer account id, not the customer id. This value is only relevant when a single customer is assigned more than one customer account.

CUSTOMER INFORMATION

**1 Wall Street Building**

PHONE 111-2222

FIRST ORDER 9/25/2015

LAST ORDER 9/25/2015

ORDERS 0

TOTAL \$0.00

AVERAGE \$0.00

Primary 111-2222 North End \$2.20 (\$25.00 FREE)

LAST NAME **1 Wall Street Building** FIRST NAME

ADDRESS 1 Wall Street

ADDRESS 2

CITY/STATE/ZIP New York NY 10005

DISTANCE 5.1 mi / 19 mins

NOTES

EMAIL louisiana@amigopos.com TAXABLE

← CANCEL
ORDERS
LOYALTY
ACCOUNT
ROUTE
MAP
→ FINISHED

CUSTOMER ACCOUNT SUMMARY

**ACCOUNT STATUS**

ACCOUNT ID 1

STARTED 9/25/2015

EXPIRES 6/3/2029


LAST USED NEVER


LIMIT \$50.00

AVAILABLE \$50.00

BALANCE DUE \$0.00

**TRANSACTION HISTORY**

  
 PRINT STATUS

  
 PAYMENT

Customer Account Status

If a payment has been made, the order can now be settled (pressing the Settle button will open the settle screen). If a mistake is made, the [customer account transaction](#)<sup>[546]</sup> can be edited in back office, as shown in the following topic.

**CUSTOMER INFORMATION**

1 Wall Street Building

PHONE: 111-2222

FIRST ORDER: 9/25/2015

LAST ORDER: 9/25/2015

ORDERS: 1

TOTAL: \$5.00

AVERAGE: \$5.00

Primary 111-2222

North End \$2.20 (\$25.00 FREE)

LAST NAME: 1 Wall Street Building

FIRST NAME:

ADDRESS: 1 Wall Street

ADDRESS 2:

CITY/STATE/ZIP: New York NY 10005

DISTANCE: 5.1 mi / 19 mins

NOTES:

EMAIL: loulisa@amigopos.com

TAXABLE:

**CUSTOMER ACCOUNT SUMMARY**

ACCOUNT STATUS		TRANSACTION HISTORY	
ACCOUNT ID	1	\$5.00 PAYMENT	9/25/2015 7:45 AM ORDER #6
STARTED	9/25/2015	\$3.05 SALE	9/25/2015 7:44 AM ORDER #5
EXPIRES	6/3/2029		
LAST USED	9/25/2015 7:45 AM		
LIMIT	\$50.00		
AVAILABLE	\$51.95		
BALANCE DUE	(\$1.95)		

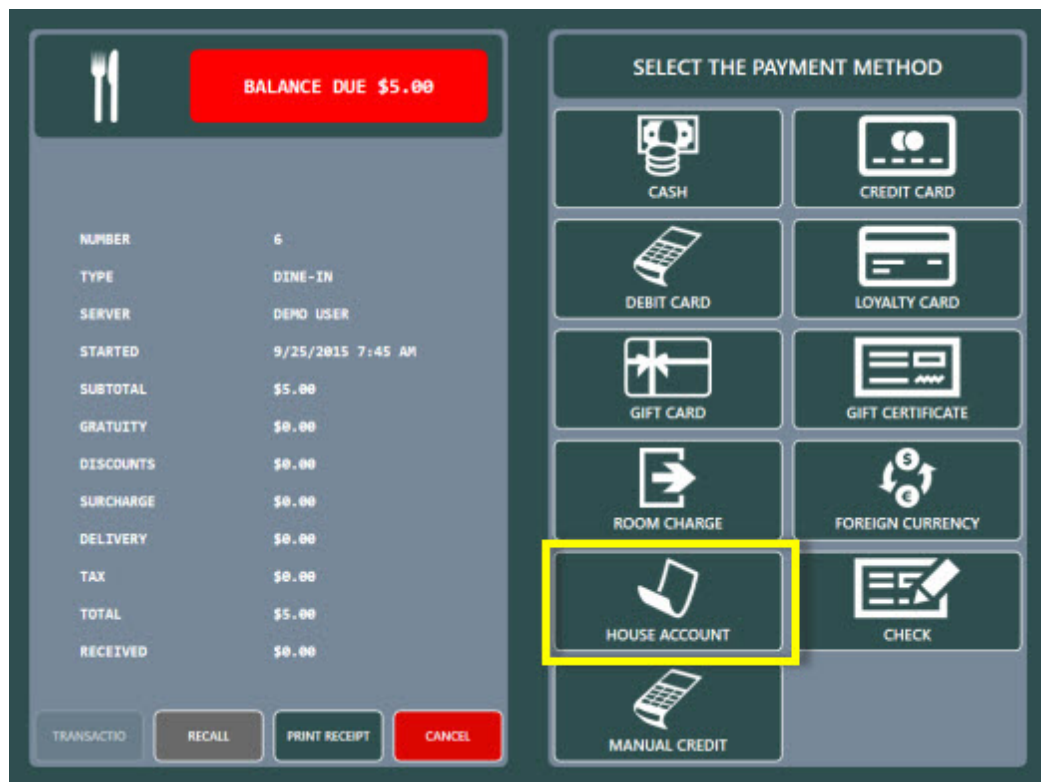
PRINT STATUS

PAYMENT

Customer Account Payment Button

## 12.3 Customer Account Transaction

Customer accounts are used for customers that promise to pay for an order balance at a later date. When a order is settled with a customer account both the order and transaction will be archived with the current business day's orders and any portion of the house account balance can be paid at a later date.



**Customer Account Payment Method**

To settle a order with a customer account, open the order on the **SETTLE** screen and select the **HOUSE ACCOUNT** payment method.



NUMBER	6
TYPE	DINE-IN
SERVER	DEMO USER
STARTED	9/25/2015 7:45 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$5.00
RECEIVED	\$0.00

TRANSACTION RECALL PRINT RECEIPT CANCEL

SELECT THE CUSTOMER ACCOUNT

1 Wall Street Building 111-2222  
\$46.95 AVAILABLE ACCT #1

FINISHED

**Customer Account Transaction Screen**

A customer receipt with gratuity and signature lines can be printed. This step is not required and does not record a transaction, but is useful when proof of the transaction may be required at a later date.

**BALANCE DUE \$5.00**

**CUSTOMER ACCOUNT STATUS**

CUSTOMER 1 Wall Street Building 111-2222  
ACCOUNT ID 1  
DEBIT \$50.00  
BALANCE DUE \$3.05  
AVAILABLE \$46.95

PRINT SUMMARY

NUMBER	6
TYPE	DINE-IN
SERVER	DEMO USER
STARTED	9/25/2015 7:45 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$5.00
RECEIVED	\$0.00

TRANSACTION RECALL PRINT RECEIPT CANCEL

**HOUSE ACCOUNT TRANSACTION**

AMOUNT 5.00

GRATUITY 0.00

TOTAL \$5.00

CHANGE PAYMENT METHOD PRINT SIGNATURE SLIP

1 2 3

4 5 6

7 8 9

0

▶

#### Customer Account Signature Slip

Press **PRINT SIGNATURE SLIP** and present the slip to the customer for signature and gratuity. After the customer has entered the gratuity amount and signed the slip (or if a signature slip is not required), enter the amount and gratuity on the screen. Press the green button to complete the transaction.

**CUSTOMER ACCOUNT STATUS**

CUSTOMER	1 Wall Street Building 111-2222
ACCOUNT ID	1
CREDIT	\$50.00
BALANCE DUE	\$3.05
AVAILABLE	\$46.95

[PRINT SUMMARY](#)

NUMBER	6
TYPE	DINE-IN
SERVER	DEMO USER
STARTED	9/25/2015 7:45 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$5.00
RECEIVED	\$5.00

[TRANSACTIONS](#)

**TRANSACTION COMPLETE**

AMOUNT TENDERED \$5.00

**NO CHANGE DUE**

[ADDITIONAL PAYMENT](#) [PRINT RECEIPT](#)

[FINISHED](#) [LOGOUT](#)

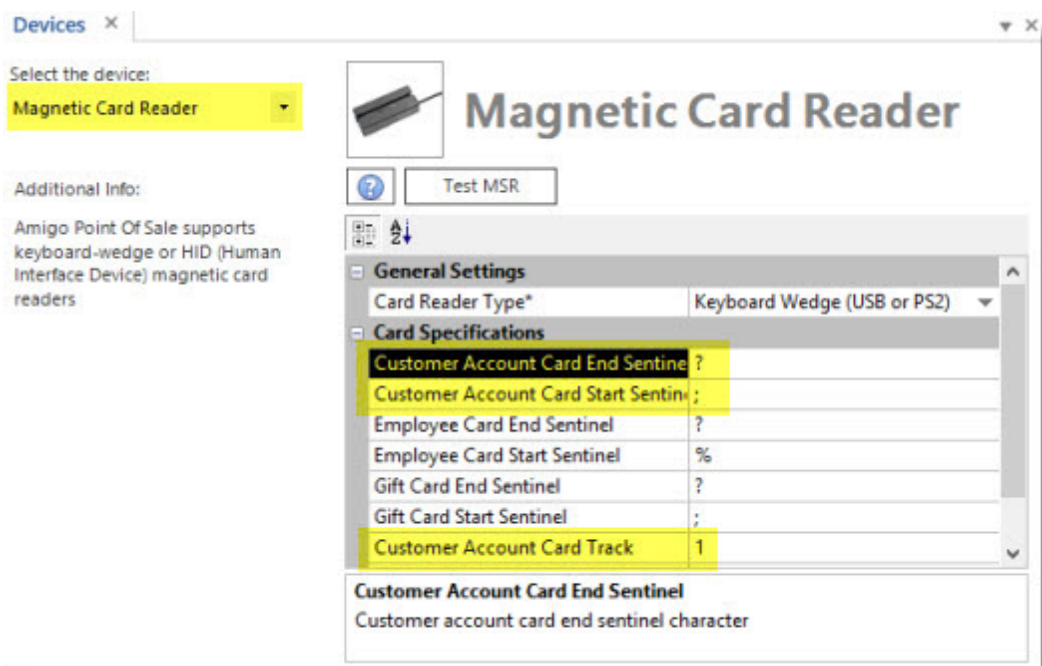
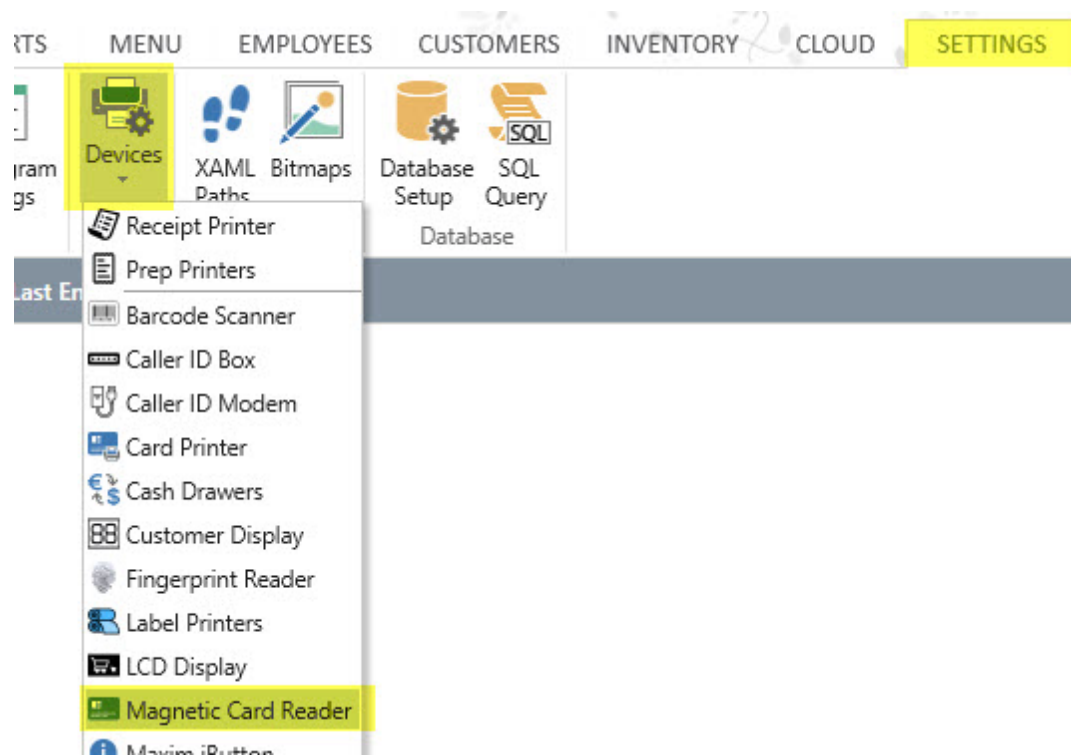
Customer Account Transaction

If a gratuity is to be added, press the **ADD GRATUITY** button and enter the gratuity amount. When all transaction details are confirmed, press the **PROCESS TRANSACTION** button to complete the transaction. If a mistake is made, the transaction can be edited in back office as shown in the following [topic](#)<sup>[546]</sup>.

## 12.4 Card Swipe/Barcode

### Magnetic Swipe Card

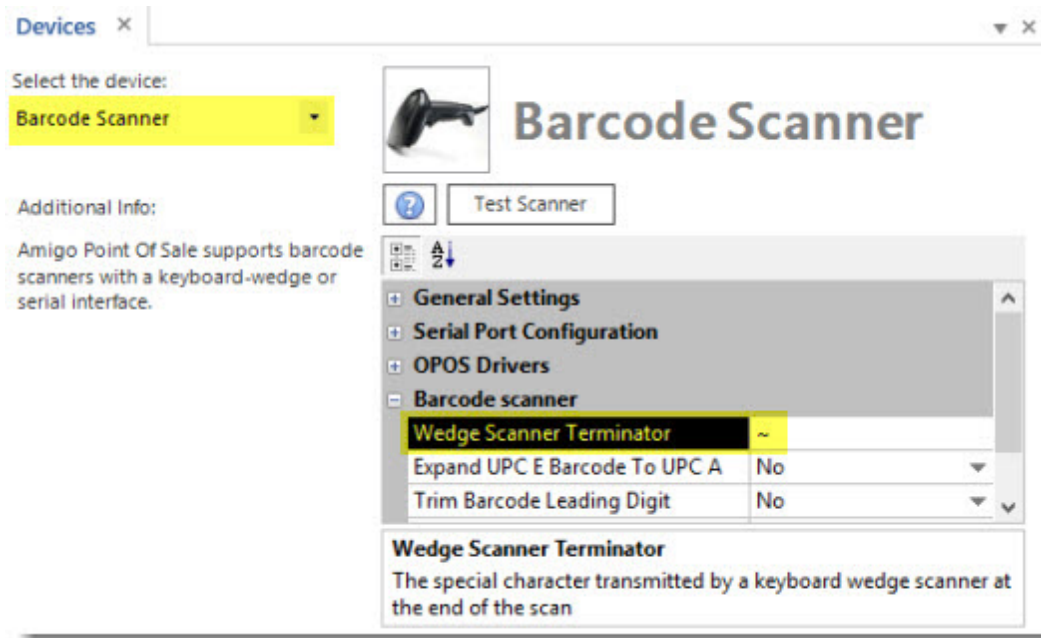
Verify that the magnetic card reader or barcode scanner is configured properly and displays the correct data in the back office peripheral test screens. Customer account cards with magnetic stripes should be encoded as per the specifications for employee or gift cards. Refer to the [sample gift card configuration](#)<sup>[742]</sup> topic for additional information.



Magnetic Swipe Card Settings

Barcode

Cards with barcodes can use any type of barcode; code 39 barcodes are recommended for easy setup. When using a wedge scanner, care must be taken to ensure that the end sentinel, i.e. tilde ~, is not included in the card number field. Refer to the [barcode scanner configuration topic](#)<sup>113</sup> for additional information.



**Wedge Scanner Terminator**

### New Customer Accounts

To assign a card to a new customer account, simply swipe or scan the card before pressing the PROCESS button on the new customer account screen. Note that duplicate card numbers are not allowed. If a card is to be assigned to a different customer, it must be removed from the original customer account first.

### Existing Customer Accounts

Open **Back Office>Customers>Customer Accounts**. The card number field on the customer accounts grid contains the numeric card number. It should not include the start or end sentinel characters. If swiping or scanning the card, highlight the customer account row before swiping or scanning the card so that the original card number is replaced with the new card number.

Part 13

# Database

## 13 Database

### 13.1 Overview

SQL Server Express is preferred over flat-file databases because it provides greater stability and greatly reduces chance of corruption due to abrupt computer shutdown or network disruption. SQL Server Express is installed on a single workstation and other pos stations and back office computers connect to SQL Server Express over the local network.

The preferred location to run SQL Server Express is the main pos station, not a back office workstation, so that the main pos station can continue to function in the event of network disruption. The AmigoPOS installer can install and configure MS SQL Server Express automatically if the workstation is connected to the internet. Note that this option may add 10-25 minutes to the total setup time. Windows 7 users should verify that Microsoft .Net Framework 4 is installed before proceeding. Installation failures are usually caused by failure to restart the workstation after a prerequisite is installed. The detailed system requirements for SQL Server Express 2012 are listed on the [Microsoft](#) web site.

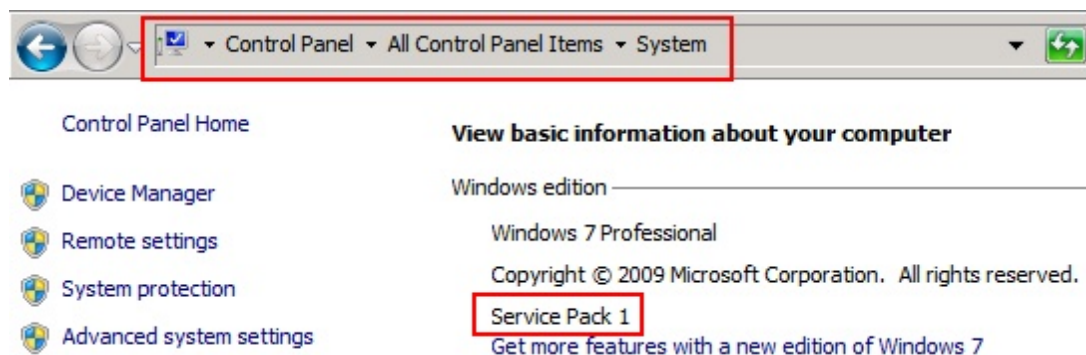
#### SQL Server Version

##### Windows 8 and Windows 8 Professional

SQL Server Express 2012 is installed by default. The installer will automatically download the correct version based on the architecture (32-bit for x86 and 64-bit for x64). Windows 8 ships with all of the prerequisites installed.

##### Windows 7/PosReady 7

SQL Server Express 2012 is installed by default. The installer will automatically download the correct version based on the architecture (32-bit for x86 and 64-bit for x64). Windows 7 and PosReady 7 workstations must have Service Pack 1 (SP1) installed or the SQL Server installation will fail. Note that most Windows 7 users already have Service Pack 1 installed if Windows Update is enabled or the PC shipped after February 9, 2011.



#### Windows 7 with Service Pack 1 Installed

##### Summary of Steps

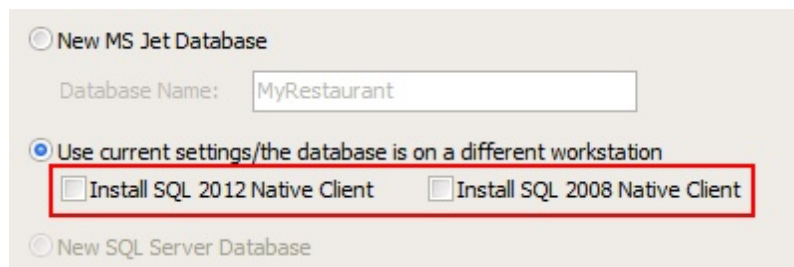
1. Verify that the Windows network is configured correctly to allow one workstation to access another workstation with no permission errors. When using Windows XP, use Simple File Sharing and share the My Documents folder. For Windows 7, set up a HomeGroup and share the documents folder. Verify that the network is set up correctly by attempting to access a shared folder or printer on a different PC.
2. Install AmigoPOS and SQL Server Express on Pos Station 1. The main pos station should always be used to host SQL Server so that the main pos station will continue to function in the event of network interruption.
3. Install AmigoPOS with SQL Native Client on any additional pos stations or office workstations
4. Install SQL Backup and FTP on the same pos station (Pos Station 1) that is running SQL Server Express

##### Reboot

Best practice is to reboot the workstation before running the AmigoPOS installer if SQL Server Express will be installed. SQL Server Express installation will fail if the workstation has a reboot pending, usually from installing Windows Updates, Microsoft .Net 3.5 SP1 Framework or Microsoft .Net 4 Framework.

### Client Workstations

Note that SQL Server Express should be installed at a single workstation only. When AmigoPOS is installed at the other workstations, select the **Use a database on a different workstation** option and check the box to install Microsoft® SQL Server® Native Client. Select the correct version of Native Client for the SQL Server Express version running on the main pos station.



### Install SQL Native Client at all other workstations

It is recommended for MS SQL Server Express to be installed at the main pos station (i.e. cash drawer station or station closest to the door) so that at least one pos station is usable in the event of local network failure. Furthermore, if SQL Server Express is running on an office workstation and the workstation should require reboot due to automatic installation of Windows updates, the database server may be offline until the system is rebooted. If the office is inaccessible (i.e. door locked), the pos stations will be unable to connect to the database.

A system reboot is not required after installation. After AmigoPOS is started for the first time, the Database Connection error screen will appear. Click Retry and enter the same SQL Server connection settings as the pos station running SQL Server Express (available at the main pos station **Back Office>Settings>Database Settings**).

### Settings

The default instance for SQL Server is **SQLExpress** and the database server can be accessed by using the workstation name and instance, ie **COMPUTERNAME\SQLEXPRESS**. The sa password is the password for the system administrator. Enter a strong password that is hard to guess. If the password is forgotten, the only way to reset the password is by using MS SQL Management Studio to connect to the database server using Windows authentication and then resetting the password.

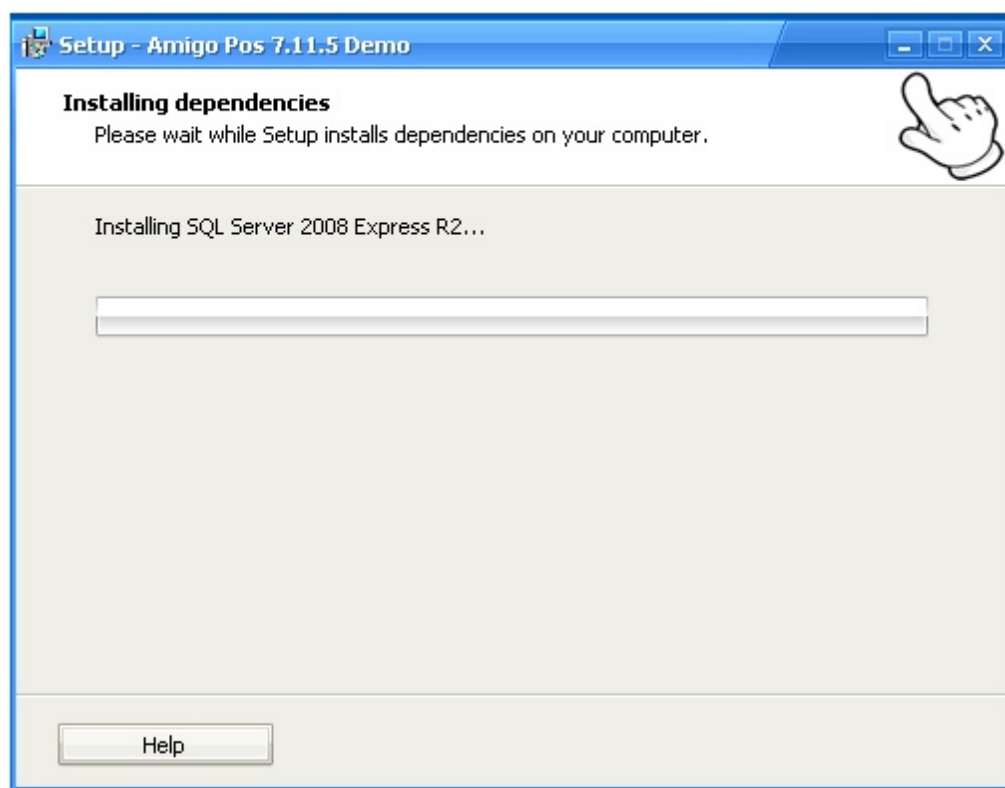
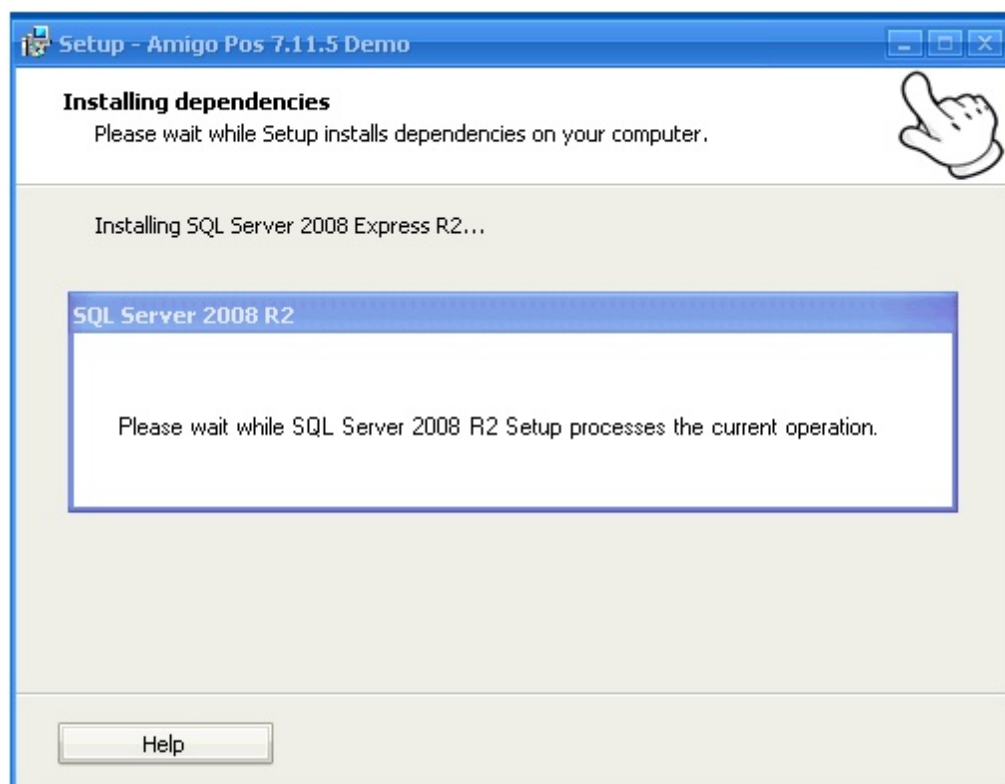
The installer will create a new database named AmigoPOS after SQL Server Express is installed. Note that the installation will fail if either (a) SQL Server Express was previously installed at the workstation with the default instance SQLExpress or if a database named AmigoPos.mdf already exists in the SQL Server Express data folder. The installer has been configured to automatically enable both the Named Pipes and TCP/IP protocols. In addition, the installer will automatically create firewall exceptions based on the script in the [SQL Server Firewall Exceptions](#) help topic.

After installation, the AmigoPOS back office database configuration is updated automatically with the new database server name, instance, database name, login id and password.

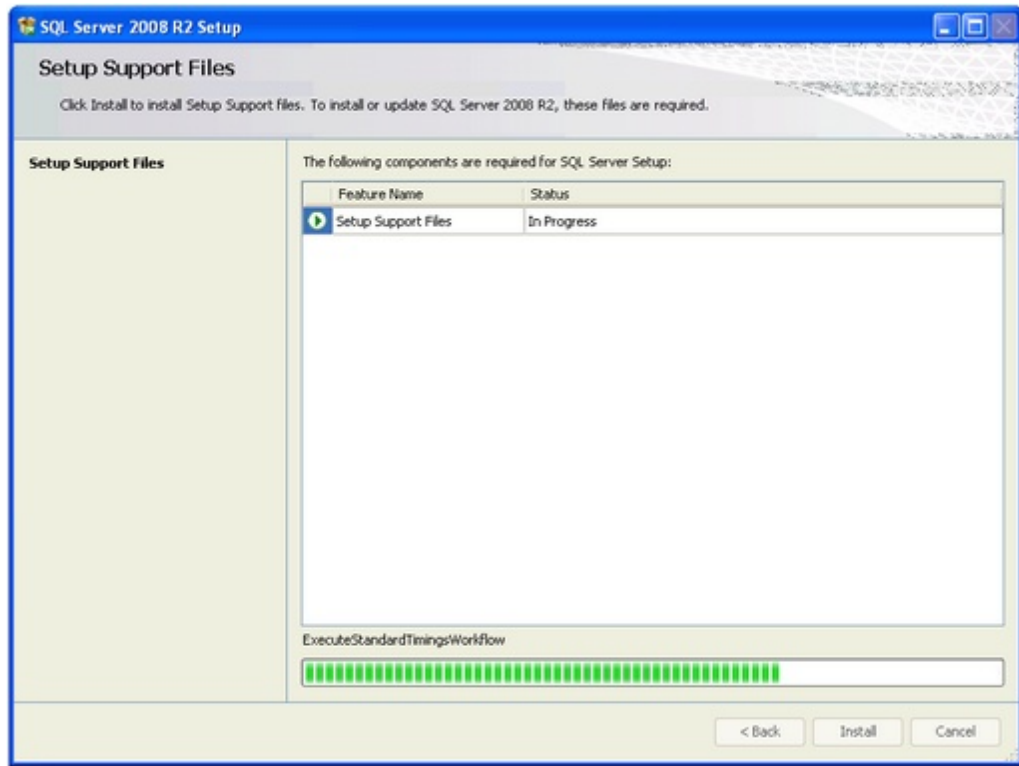
### Installation Progress

The following images describe the typical installation sequence of SQL Server Express. Total time is 10-25 minutes depending on the processor and available memory.

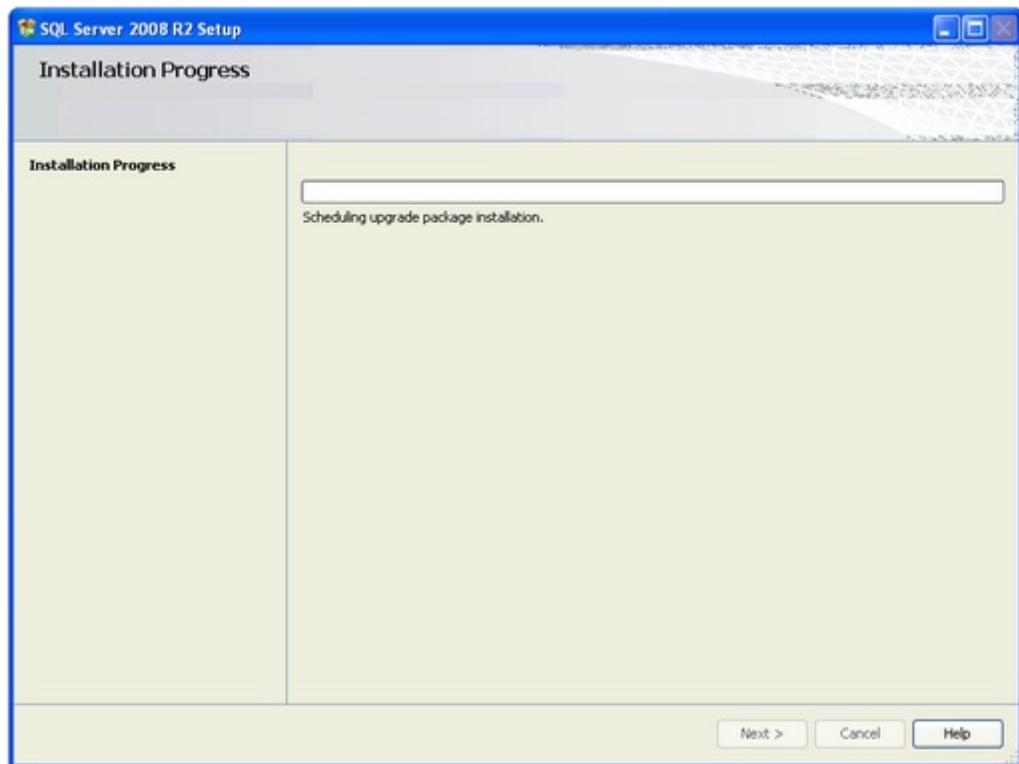


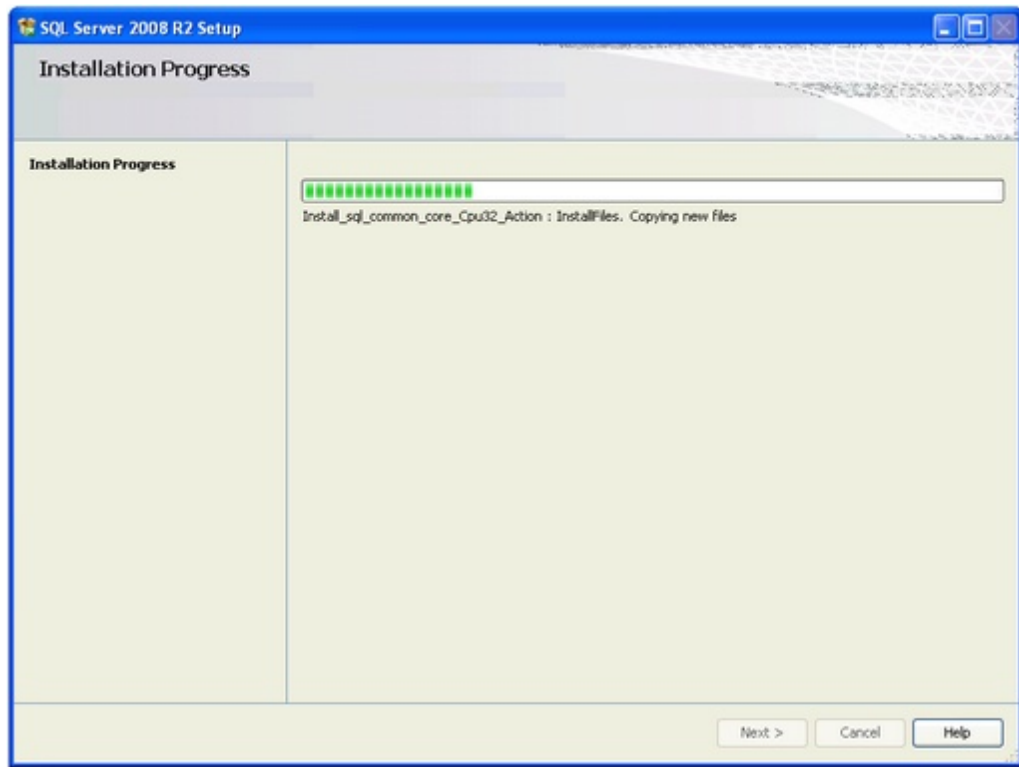
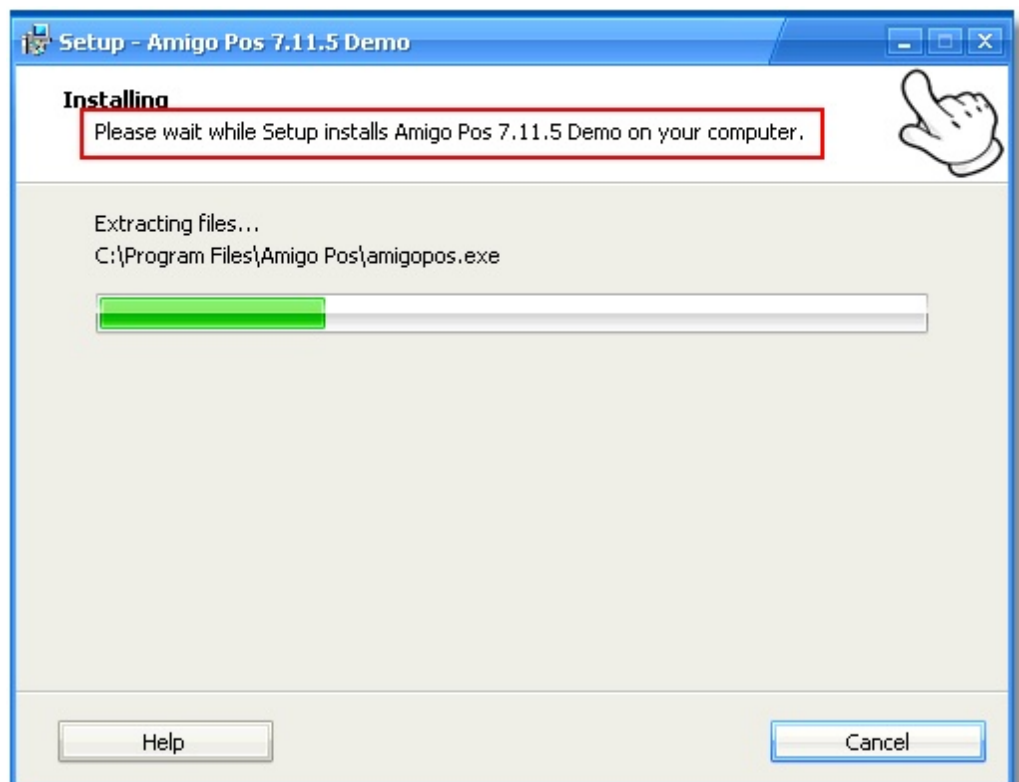
**SQL Server Installation Initialization**

### SQL Server Installation Startup



### SQL Server Setup Support Files Installation



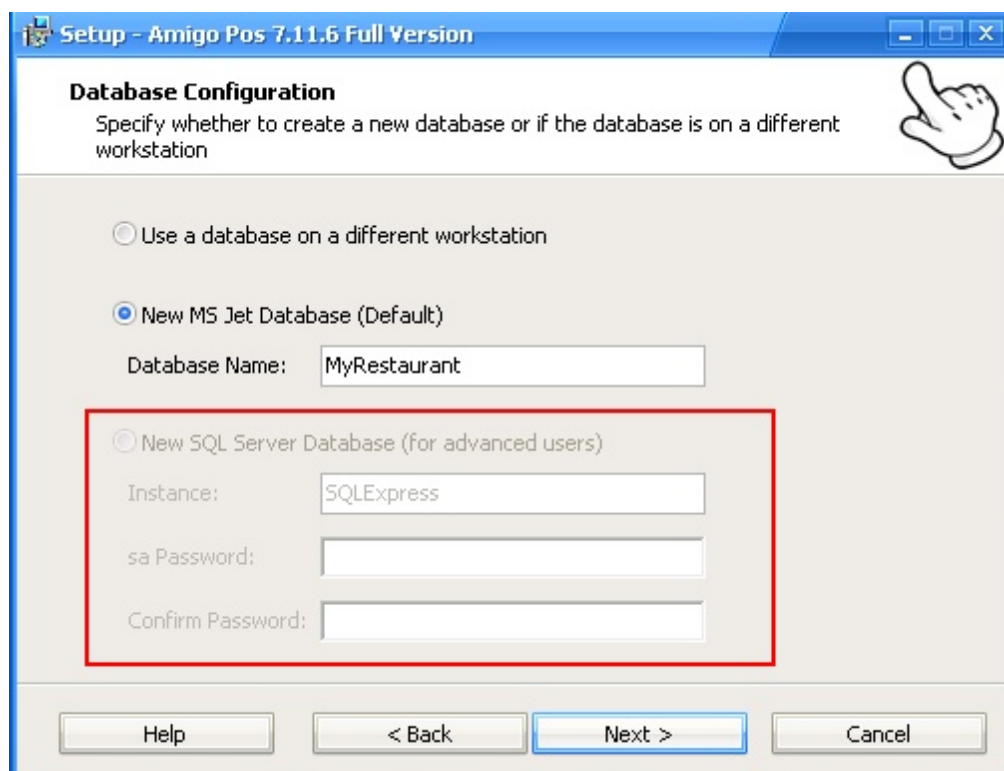
**SQL Server Installation Progress****SQL Server Installation Progress**

## Installation Progress

### 13.2 Prerequisites

#### Prerequisites

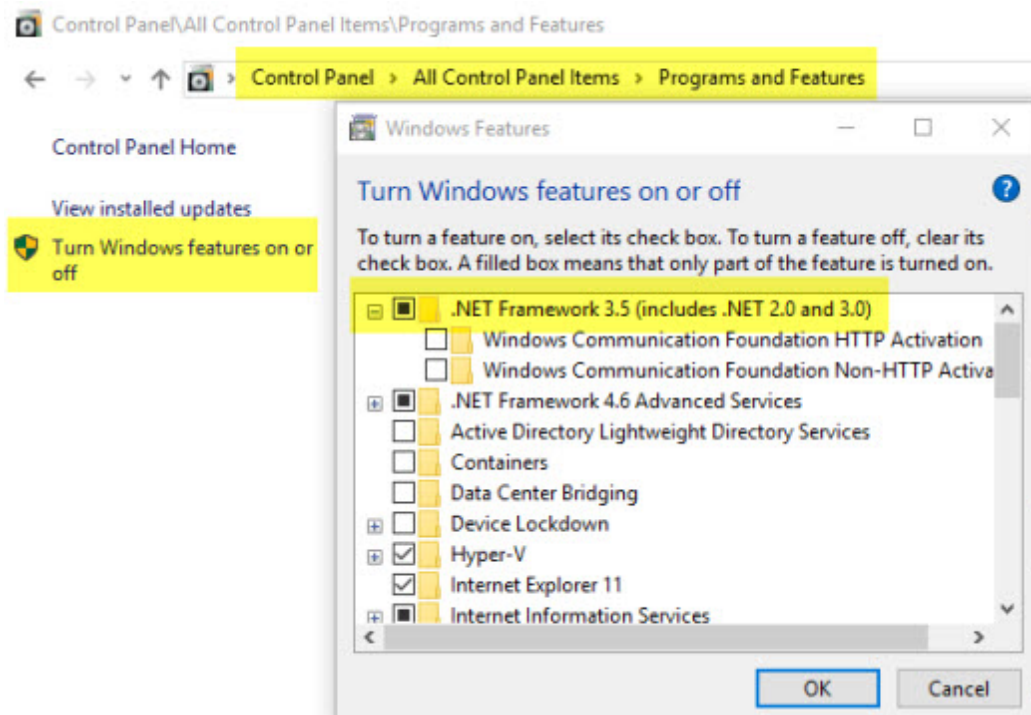
Windows 8, 8.1 & 10 ship with the necessary prerequisites for SQL Server 2012. Windows 7 and PosReady 7 users must verify that Microsoft .Net Framework 4 is installed. If not, run Windows Update to install Service Pack 1 and reboot.



**MS SQL Server is disabled until prerequisites are installed**

#### Microsoft .Net Framework 3.5 SP1

In order to simplify the installation process, the option to install MS SQL Server is enabled only if Microsoft .Net Framework 3.5 SP1 is installed on the workstation. If Microsoft .Net Framework 3.5 SP1 is not installed, shut down the AmigoPOS installer, enable .Net Framework 3.5 in **Windows Control Panel > Programs and Features > Turn Windows features on or off** (or download and install Microsoft .Net Framework 3.5 SP1), reboot and run setup again. The image below displays the Windows 10 **Turn Windows features on or off** applet with .Net Framework 3.5 enabled.

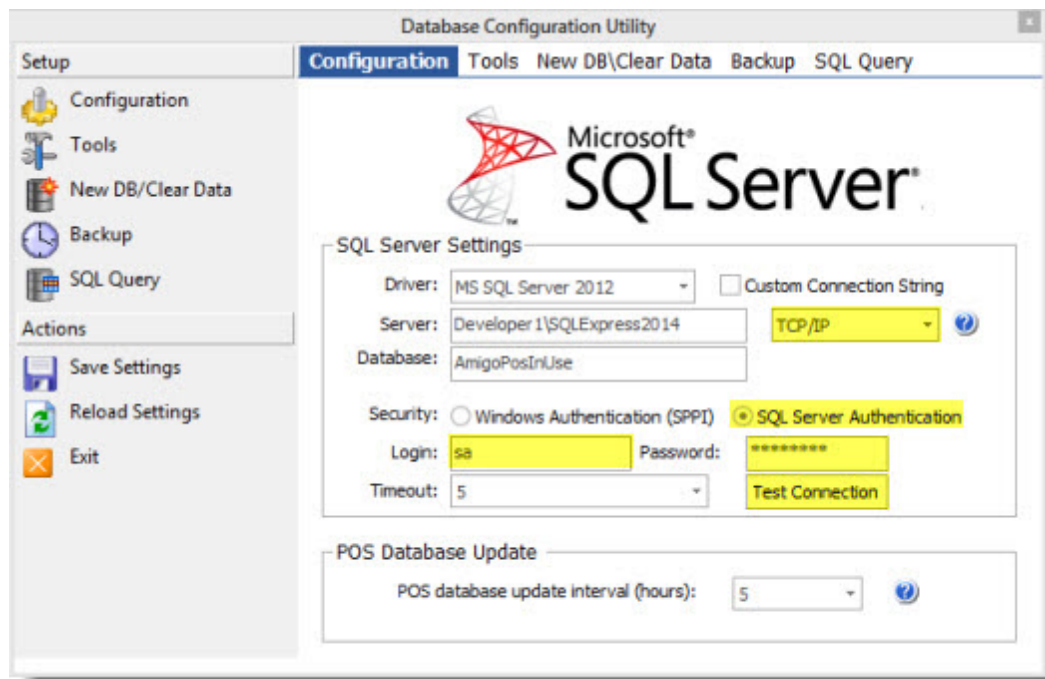


Windows XP Control Panel > Add/Remove Programs

[Microsoft .Net Framework 3.5 SP1](#) (Bootstrapper) (requires internet access while installation is in progress)  
or  
[Microsoft .Net Framework 3.5 SP1](#) (Full Package) (does not require internet access to run installer)

### 13.3 Client Stations

This topic applies to workstations where the SQL Server Express database server is **not installed**. After installing Microsoft® SQL Server® 2012 Native Client on each workstation where SQL Server is not installed, as described in the previous topic, open the database configuration utility. Enter the server name and instance separated by a backslash. Enter the database name. Select SQL Server Authentication and enter the log (sa) and the password that was entered when AmigoPOS was installed on the pos station running SQL Server Express. **All settings are the same as on the pos station where the SQL Server Express database engine is installed.** Click Test to save the settings and verify connectivity.

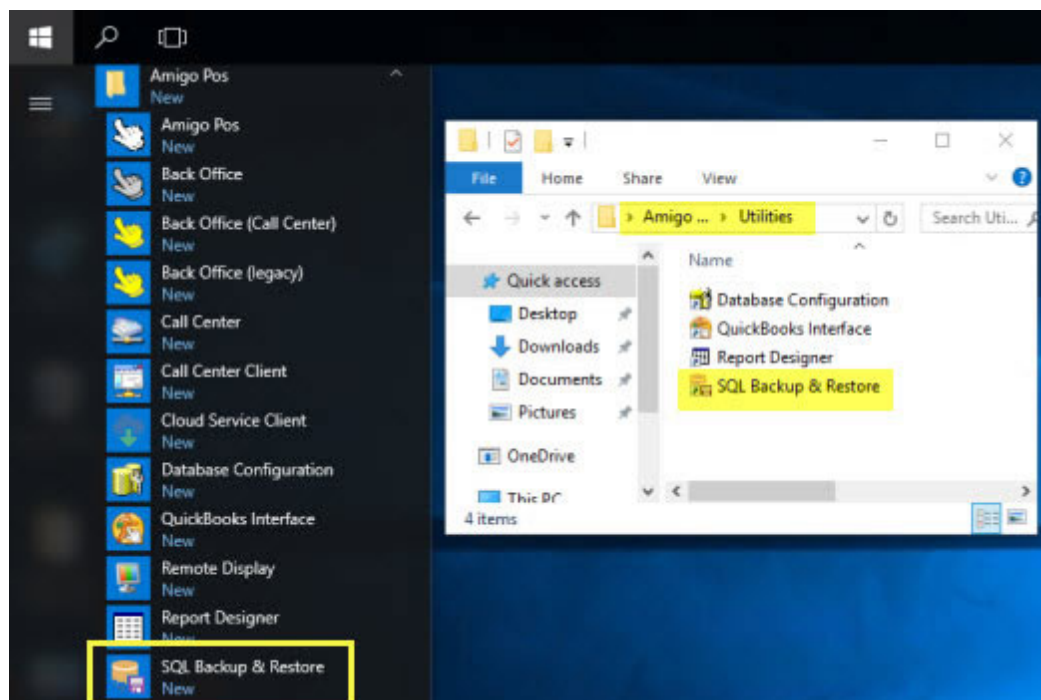


**Windows 7 client connecting to SQL Server running on Windows XP using TCP/IP Protocol**

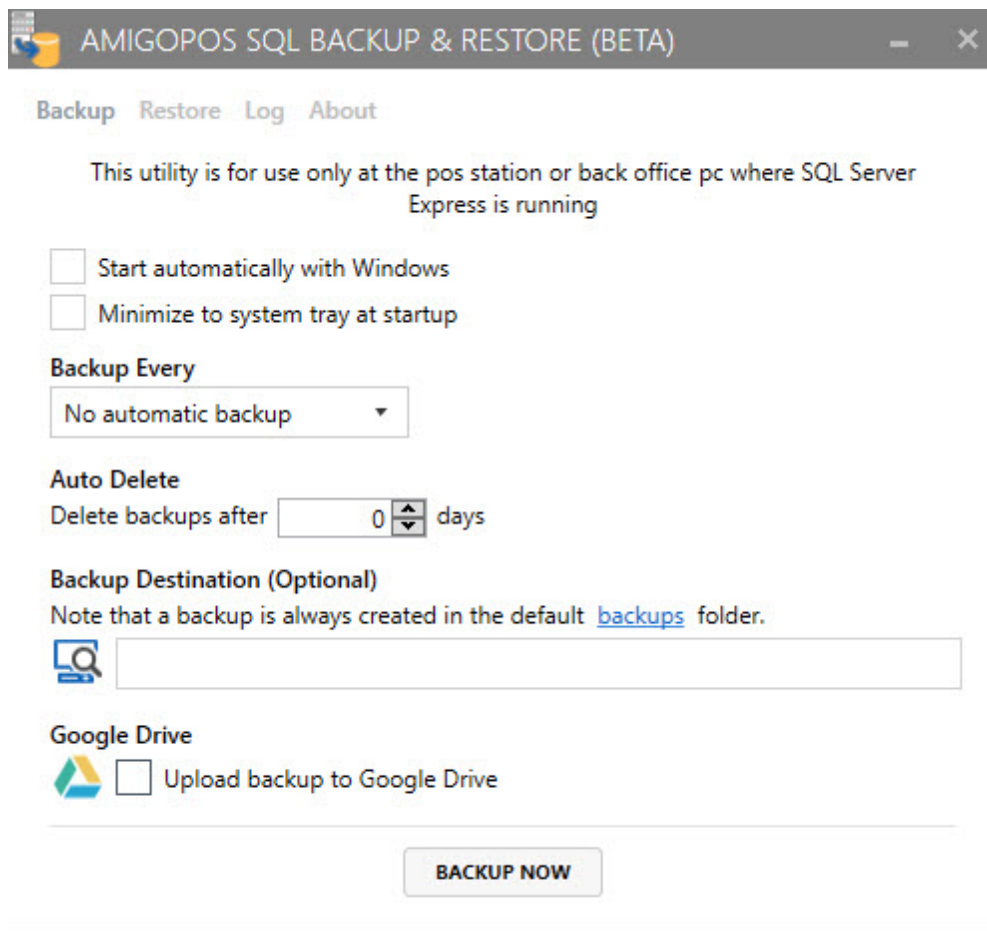
## 13.4 AmigoPOS Backup & Restore

### 13.4.1 AmigoPOS SQL Backup & Restore

AmigoPOS includes the SQL Backup & Restore utility that can automatically backup the database. The application is available in the AmigoPOS program group/Utilities folder and can be set to start automatically with Windows. Note that the utility must be running at the pos station or back office pc where SQL Server Express is running.



Start the utility from the Windows Start menu or from the desktop shortcut at the pos station or back office pc where SQL Server Express is running. Note that the utility can only create backups when running on the same pc as SQL Server Express.



#### Default Backups Folder

When automatic backups are enabled, a backup is always created in the AmigoPOS SQL Backups folder, typically located in `C:\Users\WindowsUserName\AppData\Roaming\Amigo Point Of Sale\SQLBackups`. The exact location can be determined by clicking the [backups](#) link under the Backup Destination heading.

#### Backup Settings

All database connection settings are imported from AmigoPOS and the backup and restore utility does not require any additional configuration to connect to the database server. The following options are available under the Backup tab:

- **Start automatically with Windows:** Check the box to automatically start the utility at Windows startup
- **Minimize to system tray at startup:** Check the box to automatically minimize the utility to the system tray at Windows startup. When minimized, the utility can be activated by double-clicking the icon in the system tray.
- **Backup Every**
  - No automatic backup: Disable automatic backup
  - Every day at: Backup each day at the specified time
  - When end of day is run: Backup whenever the end of day is run at any pos station
  - When cash drawer is reset: Backup whenever the cash drawer is reset at any pos station
  - Every hour: Backup once per hour
  - Once per week: Backup once per week













- Once per month: Backup once per month
- **Auto Delete:** In order to free up disk space, backups can be automatically deleted after the specified number of days. This setting applies only to the compressed backups stored in the AmigoPOS SQL Backups folder, not the optional backup destination folder described below or Google Drive.
- **Backup Destination:** A backup is always created in the AmigoPOS SQL Backups folder. Optionally, you may enter the path to a second backup folder. Normally, the second backup folder will be located on a different pos station, back office pc or removeable USB flash drive, so that a backup is available in the event of local disk failure.
- **Google Drive:** Automatically upload a compressed backup to your Google Drive account each time a backup is created.

Backup **Restore** Log About

Note that a database with the same name as the backup will be overwritten.

#### Backup Source

Select the backup file or **browse** to add a different backup to the list

AmigoPOS2017522171358.zip	7138355 Bytes		
5/22/2017 5:14:00 PM			
AmigoPOS2017522134859.zip	7138352 Bytes		
5/22/2017 1:49:00 PM			
AmigoPOS2017522134843.zip	7138341 Bytes		
5/22/2017 1:48:44 PM			
AmigoPOS2017522134833.zip	7137766 Bytes		
5/22/2017 1:48:34 PM			
AmigoPOS2017522134827.zip	7138663 Bytes		
5/22/2017 1:48:28 PM			
AmigoPOS2017522132611.zip	7138665 Bytes		
5/22/2017 1:26:12 PM			

#### Database Restore

Click the Restore tab to view a list of all database backups that are located in the AmigoPOS SQL Backups folder. The files are ordered by date with the most recent backup at the top of the list. Each compressed backup file name includes the database name and the backup date and time, i.e. `DatabaseNameYMDhms.zip`.

A backup can be manually deleted by clicking the red delete icon. Deleting a backup is permanent and cannot be reversed. The auto delete setting can also be used to automatically delete old backup files from the AmigoPOS SQL Backups folder.

A database backup can be restored by clicking the gray restore button. If a database with the same name exists on the server, the database will be permanently and irreversibly overwritten with the backup. If an error occurs during database restoration, refer to the log for the error description and contact AmigoPOS support for additional information. Errors typically occur if a database is imported from a different pc that is running a different version of SQL Server Express.

### 13.4.2 Google Drive

The SQL Backup & Restore utility can automatically upload the compressed database backup to your Google Drive account each time a backup is created. Open the utility and check the box below Google Drive.



The screenshot shows the 'AMIGOPOS SQL BACKUP & RESTORE (BETA)' application window. It has a menu bar with 'Backup', 'Restore', 'Log', and 'About'. A message states: 'This utility is for use only at the pos station or back office pc where SQL Server Express is running'. There are two checked checkboxes: 'Start automatically with Windows' and 'Minimize to system tray at startup'. Under 'Backup Every', a dropdown menu is set to 'No automatic backup'. The 'Auto Delete' section shows 'Delete backups after' 0 days. The 'Backup Destination (Optional)' section includes a note: 'Note that a backup is always created in the default [backups](#) folder.' Below this is a search icon and an empty text box. A yellow box labeled 'Google Drive' contains a checked checkbox for 'Upload backup to Google Drive'. A 'BACKUP NOW' button is at the bottom. A status bar at the bottom shows 'LastBackup: 5/22/2017 4:46:22 PM'.

AMIGOPOS SQL BACKUP & RESTORE (BETA)

Backup Restore Log About

This utility is for use only at the pos station or back office pc where SQL Server Express is running

☒ Start automatically with Windows

☒ Minimize to system tray at startup

Backup Every

No automatic backup

Auto Delete

Delete backups after 0 days

Backup Destination (Optional)

Note that a backup is always created in the default [backups](#) folder.

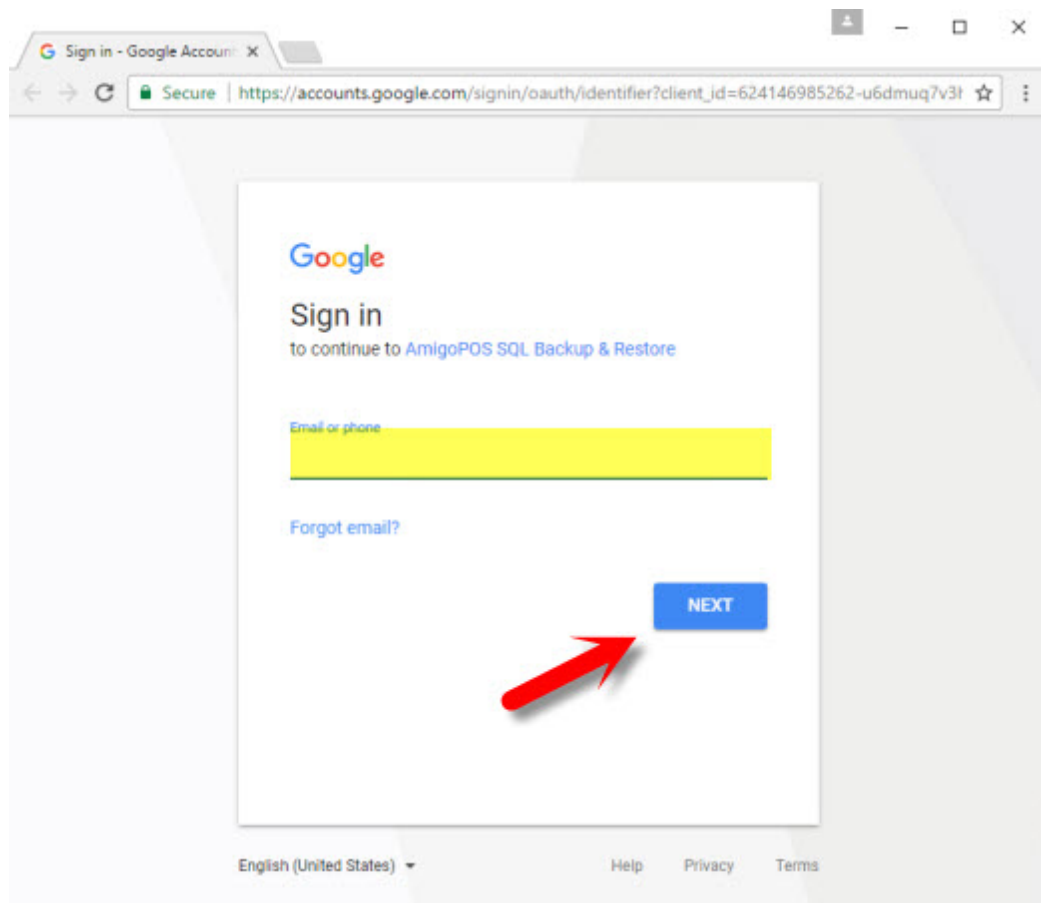
Google Drive

☒ Upload backup to Google Drive

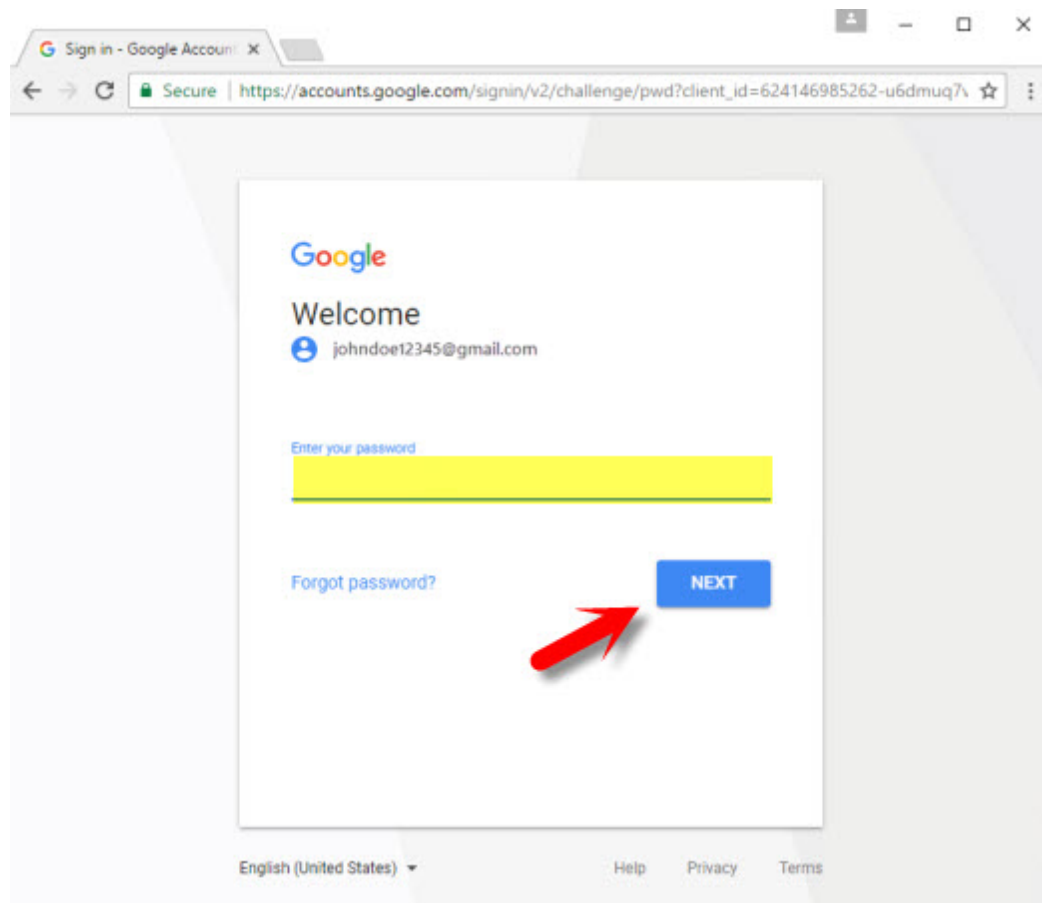
BACKUP NOW

LastBackup: 5/22/2017 4:46:22 PM

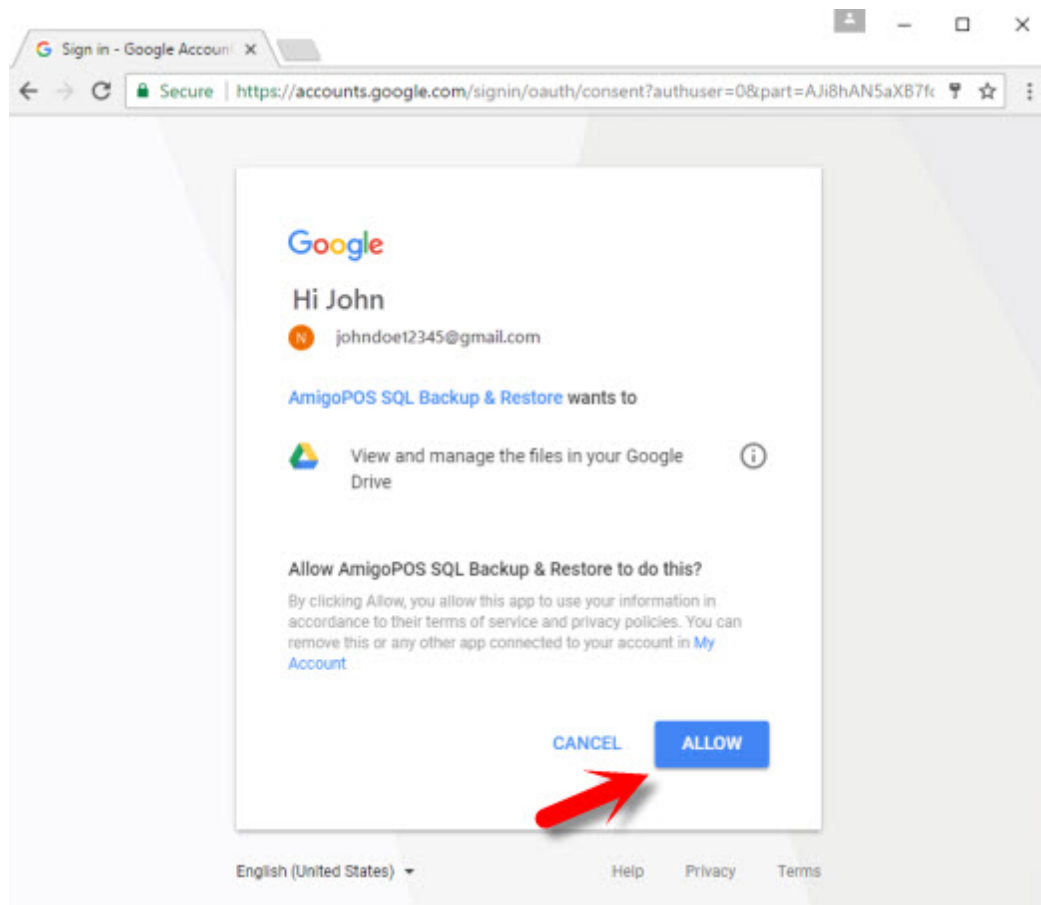
Click Backup Now to create a backup. A web browser will automatically launch prompting the user for the Google email or phone. Enter the email or phone and click **Next** to continue.



Enter the password and click **Next** to continue.



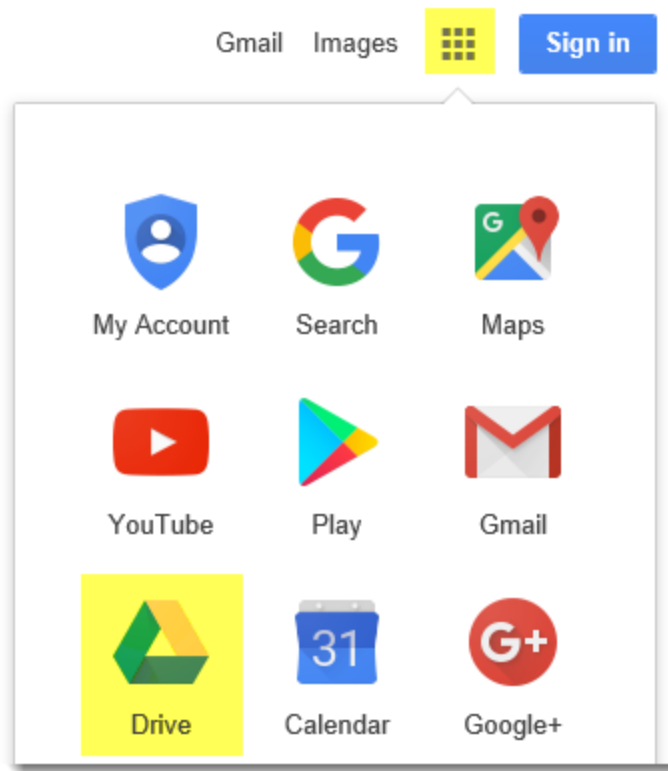
Verify that you are giving access to AmigoPOS SQL Backup & Restore by clicking **Allow**.



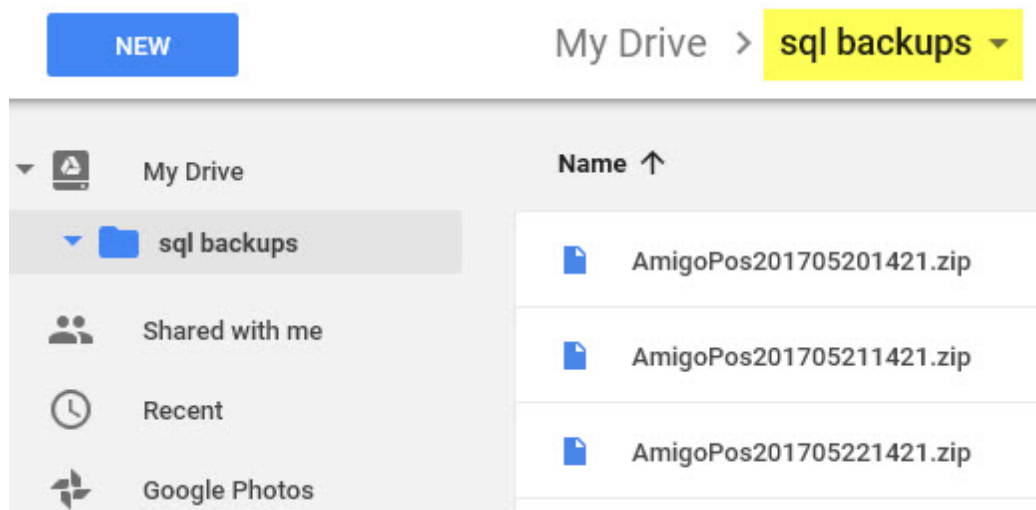
Set is complete and a backup will be automatically uploaded to Google Drive.



Login to Google and click the Google Drive icon.



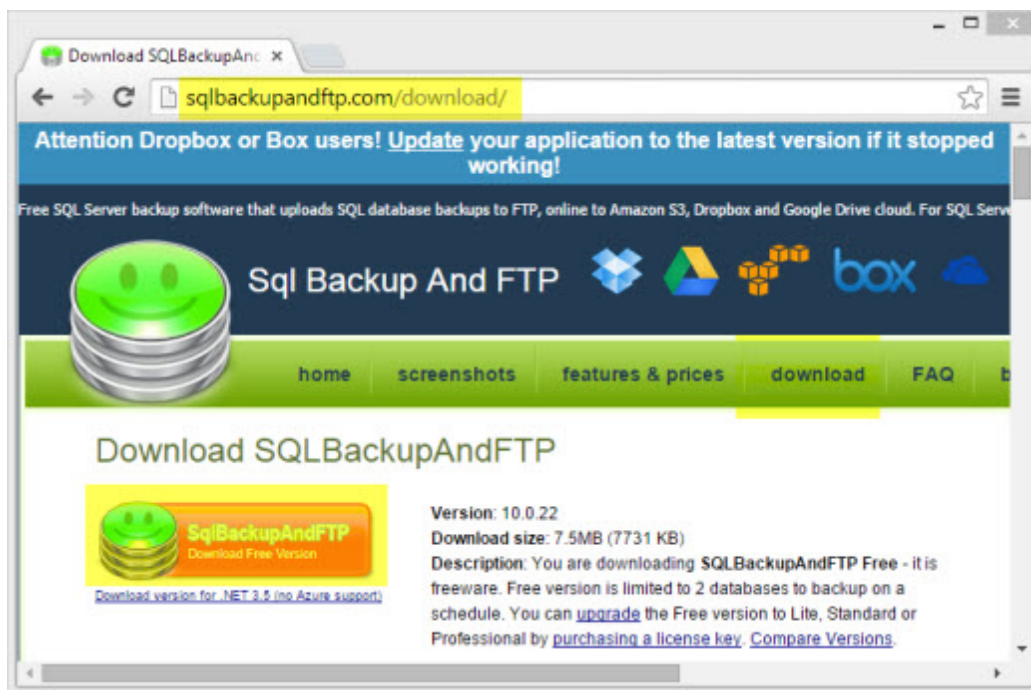
Create a backup and verify that it appears in the **My Drive > sql backups** folder.



## 13.5 SQL Backup and FTP

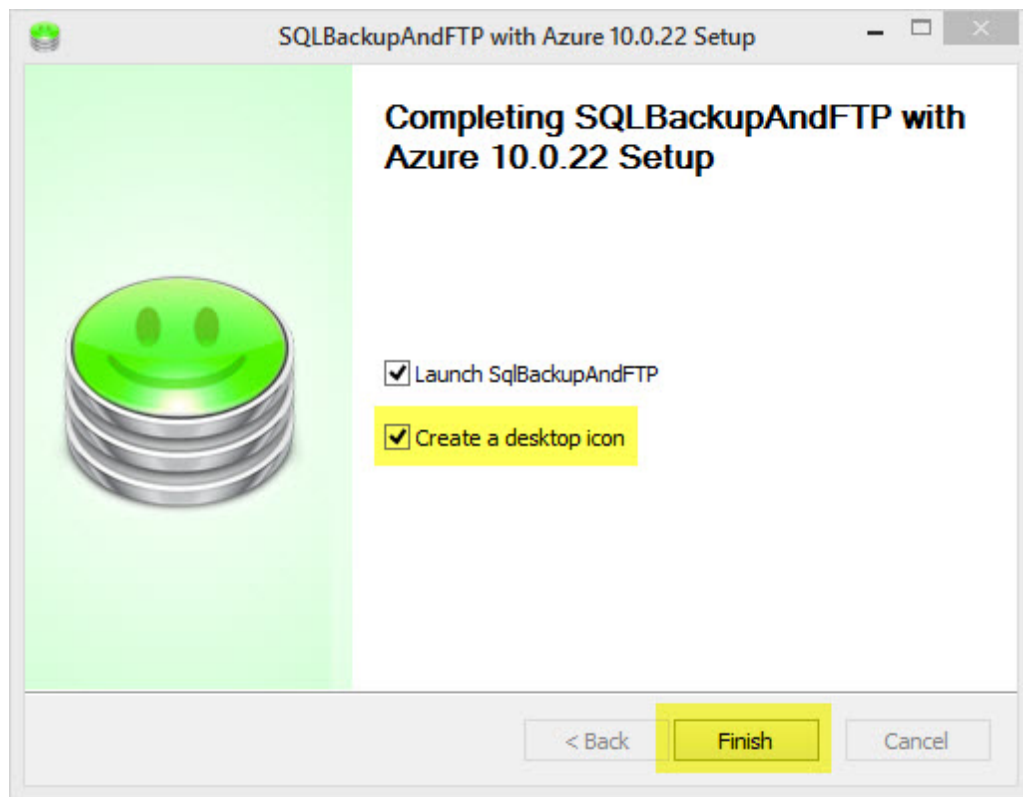
### 13.5.1 SQLBackupAndFTP

A freeware application is available to automatically backup and restore your SQL Server Express database in the event of failure. Download and install SQL Backup and FTP on the pos station running SQL Server from <http://sqlbackupandftp.com> using the default installer settings.



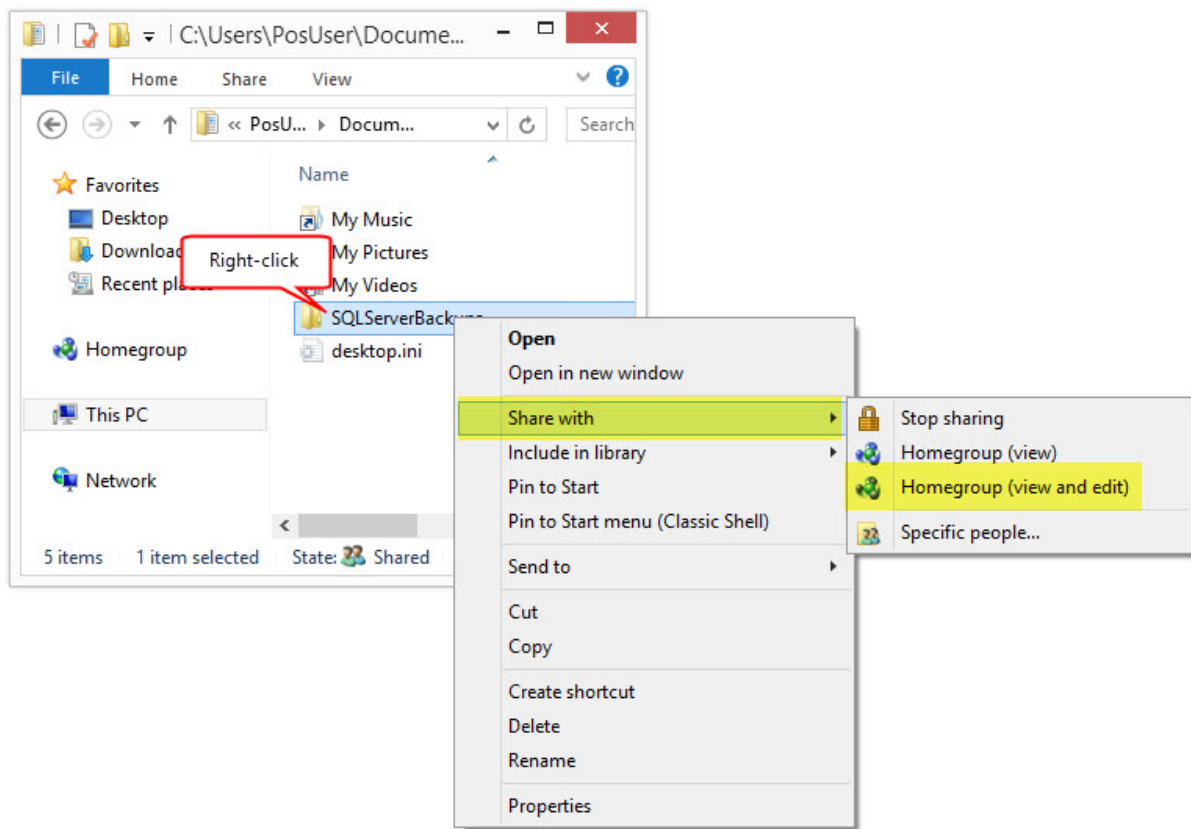
sqlbackupandftp.com download page

Download and run the SQLBackupAndFTP installer on the main pos station (where the SQL Server Express is installed). Proceed with the default settings. On the final screen check the box to create a desktop icon for easy access.



**SQLBackupAndFTP Installation Complete**

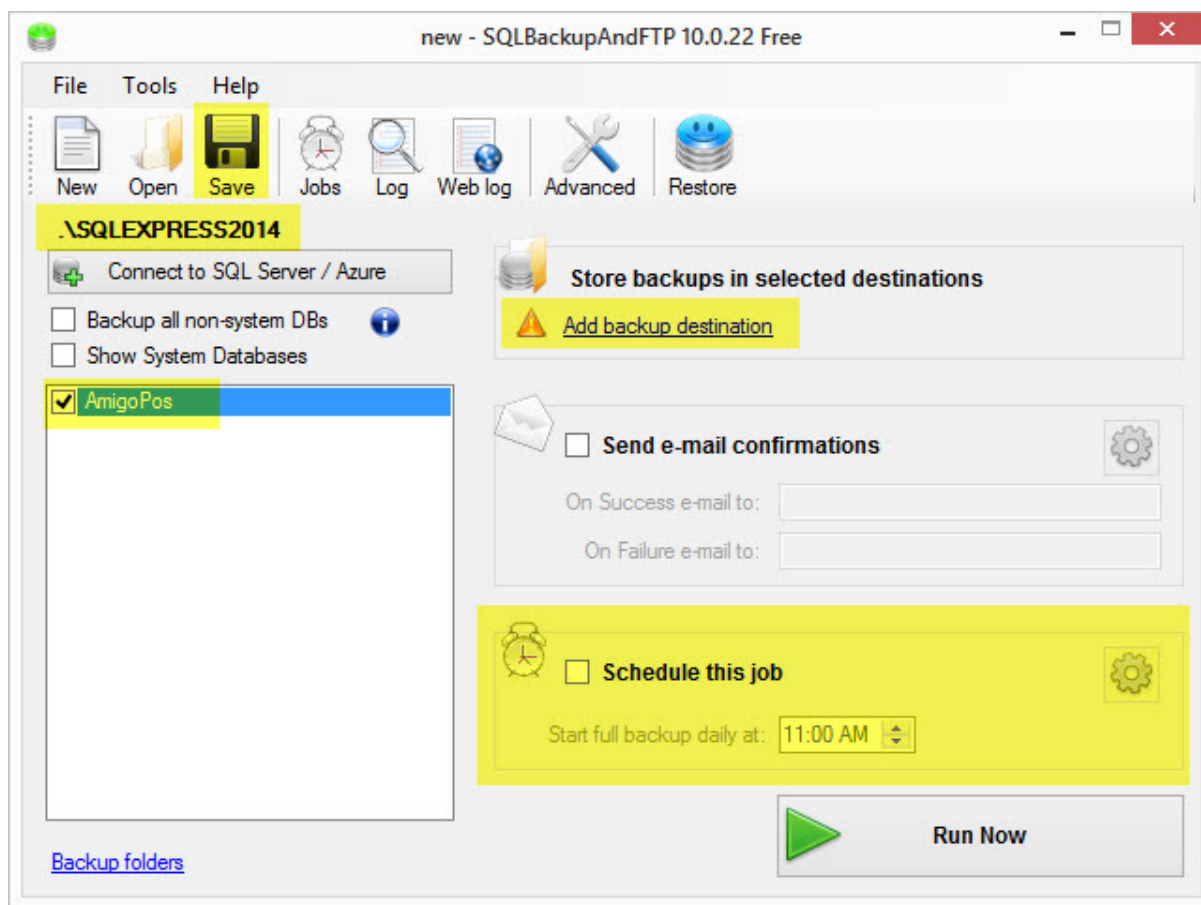
Create a backup destination on a different computer. In this example a backup folder named `SQLServerBackups` is created at `STATION2`. The folder is in the user/documents folder and can be shared with other Homegroup users by right-clicking on the folder and selecting **Share with > Homegroup (view and edit)**. For users with a single pos station, use a USB thumb drive or other removable media. Backing up to the same hard drive that stores the database is not recommended in case of disk failure.



#### Share the backup folder on STATION2

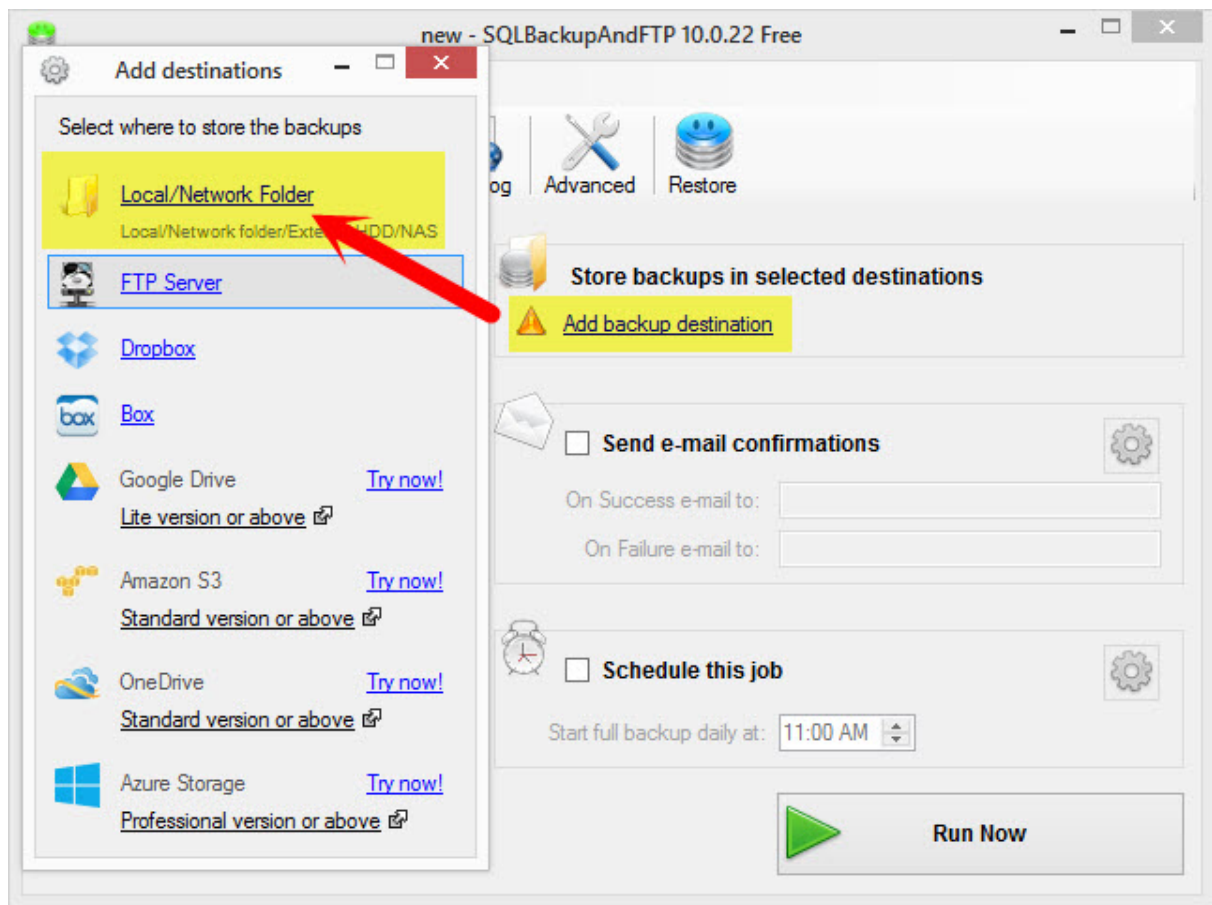
Run SQLBackupAndFTP from the desktop shortcut on STATION1 and verify that the SQL Server Express instance is displayed with the AmigoPOS database. If the correct SQL Server Express instance is not shown, click the Connect to SQL Server/Azure button to browse for the server instance that contains the AmigoPOS database. Check the box next to the AmigoPOS database and click Add backup destination.





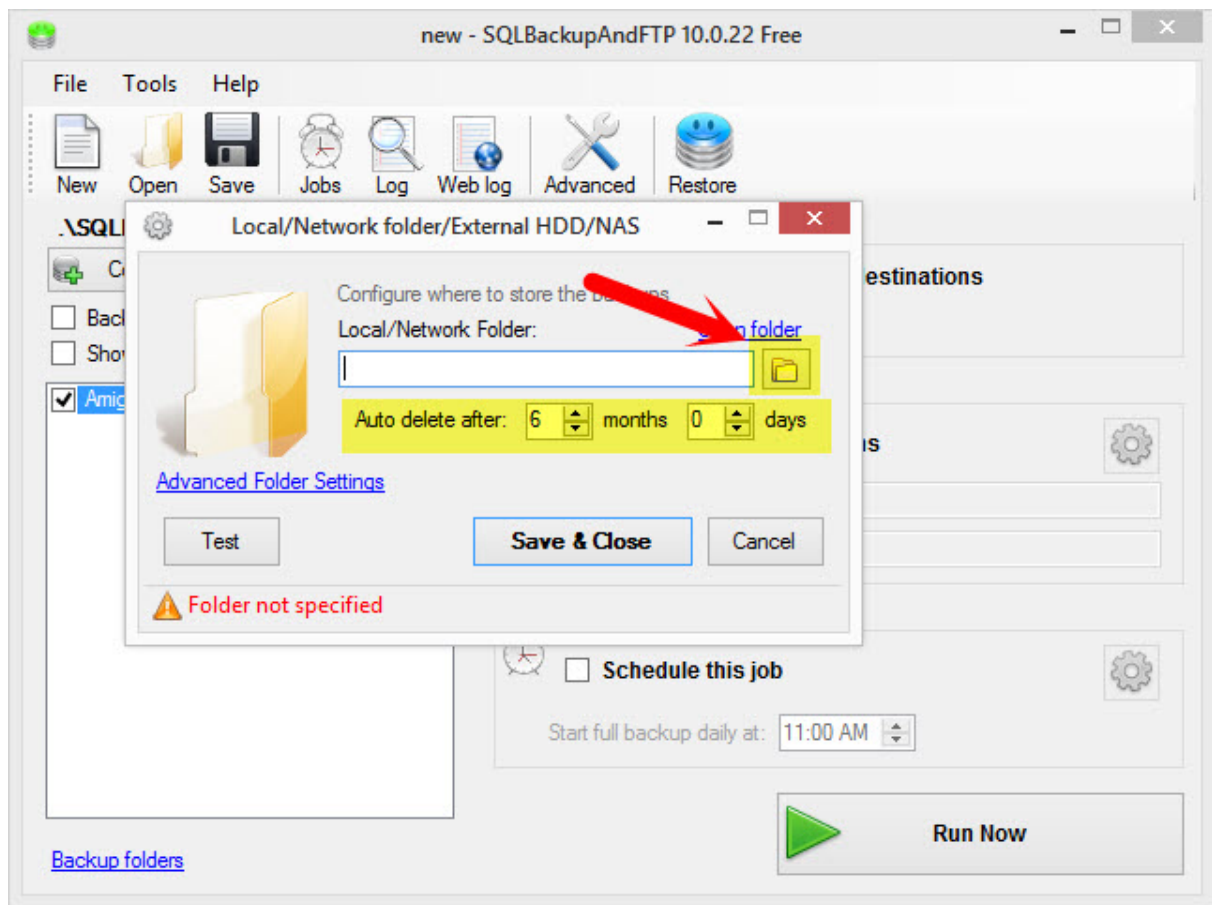
SQLBackupAndFTP Main Screen

In the backup destinations windows, click Local/Network Folder to browse for the folder that is shared on STATION2.



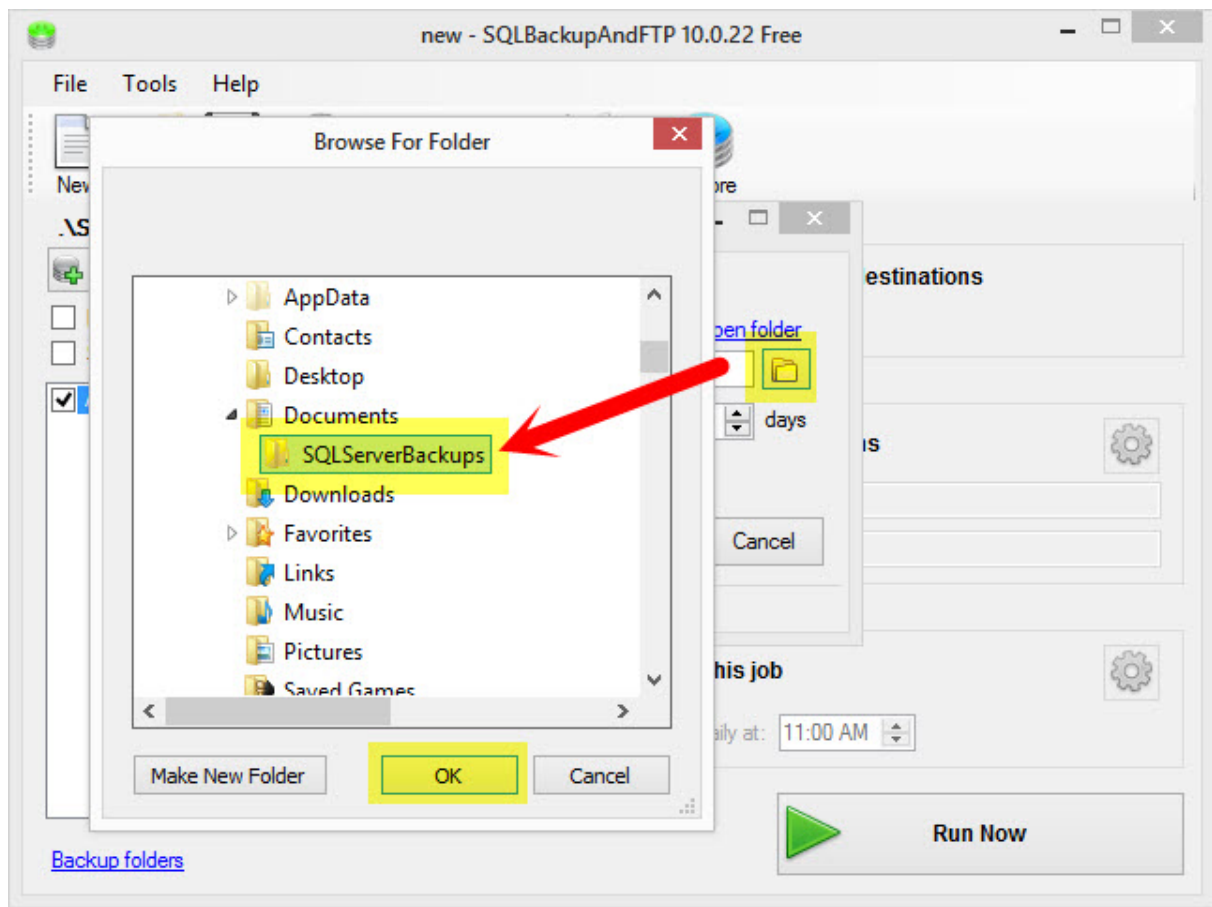
**SQLBackupAndFTP Add Destination Folder**

Click the folder icon to browse for the shared folder. Note that the backups can be auto-deleted after a predefined interval to save disk space.



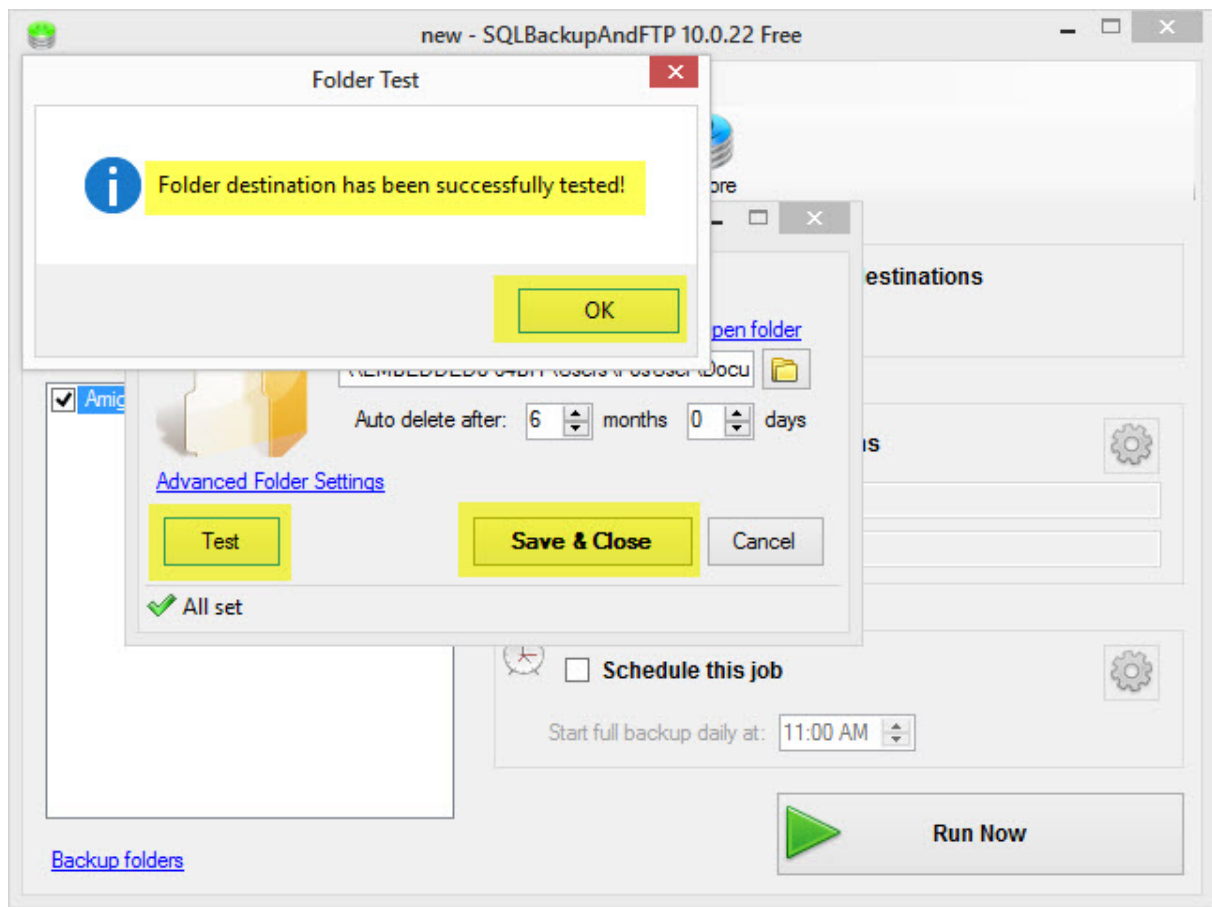
#### SQLBackupAndFTP Browse for Destination Folder

Expand the directories and locate the shared folder on STATION2. Select the folder and click OK.

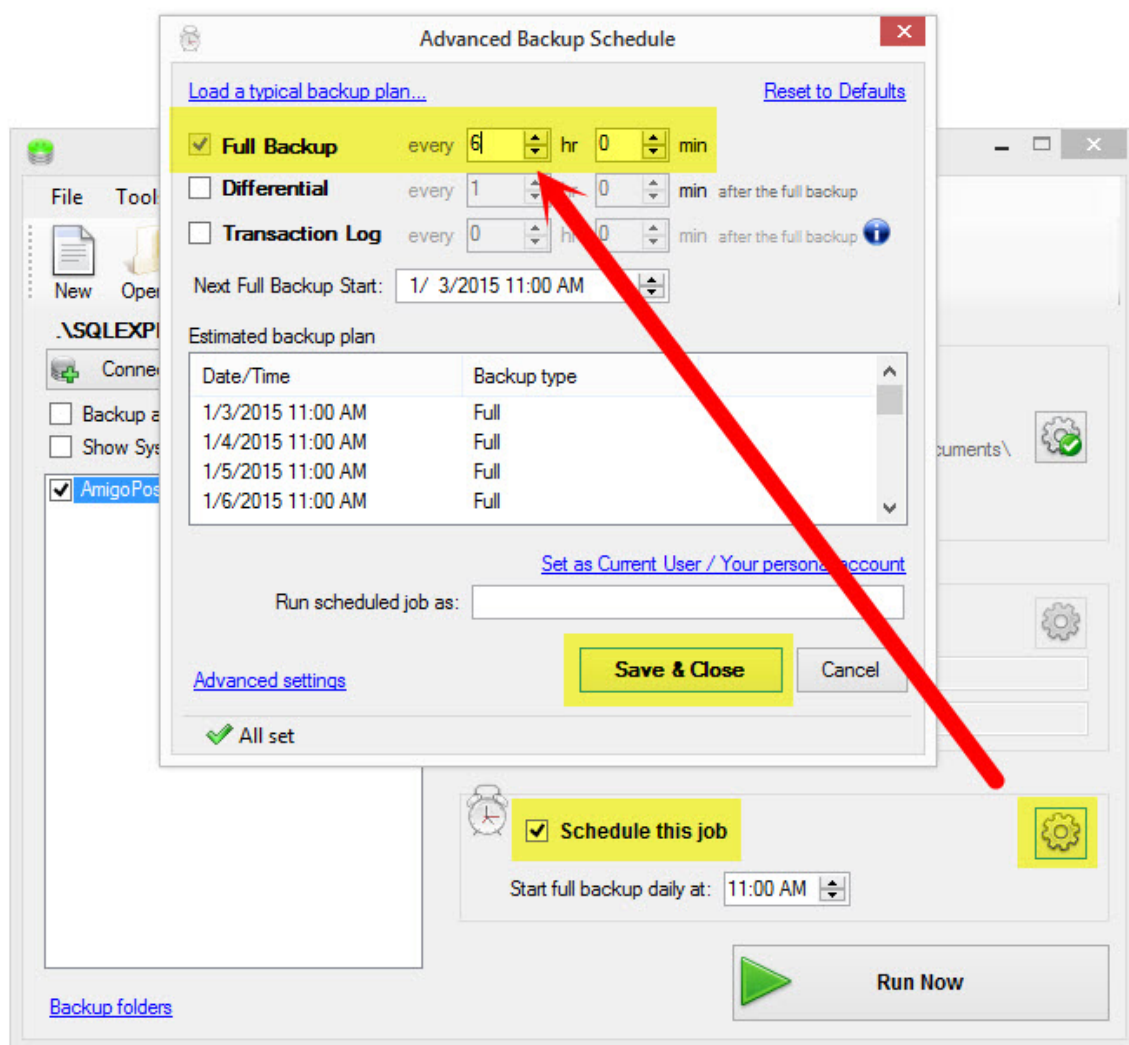


**Browse for Folder**

Click the Test button to verify that STATION1 has sufficient permissions to write to the backup folder on STATION2. Click OK followed by Save & Close to return to the main screen.

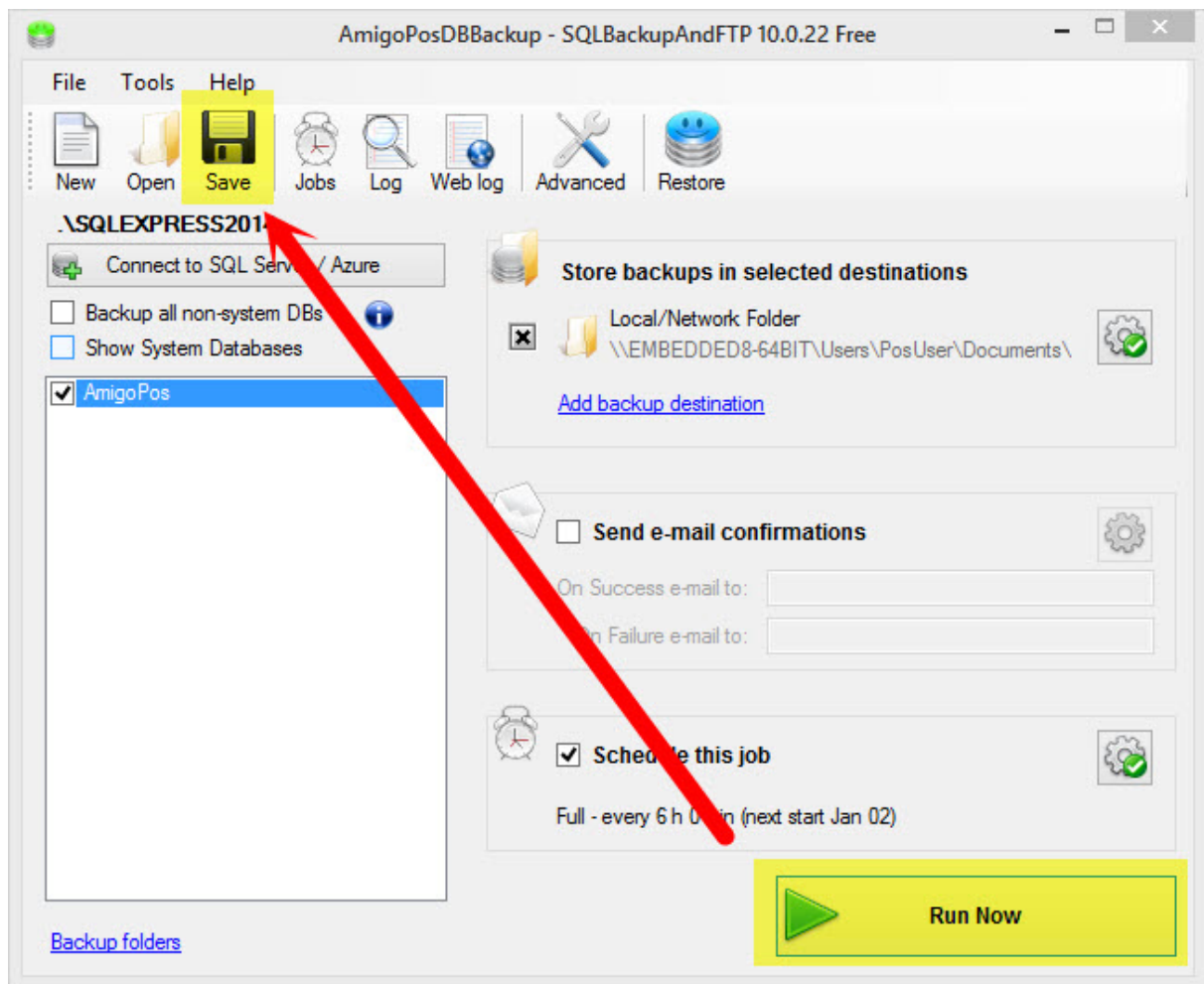


Check the box next to Schedule this job and select the backup interval. The example below is set to backup the database every 6 hours. Click Save & Close.



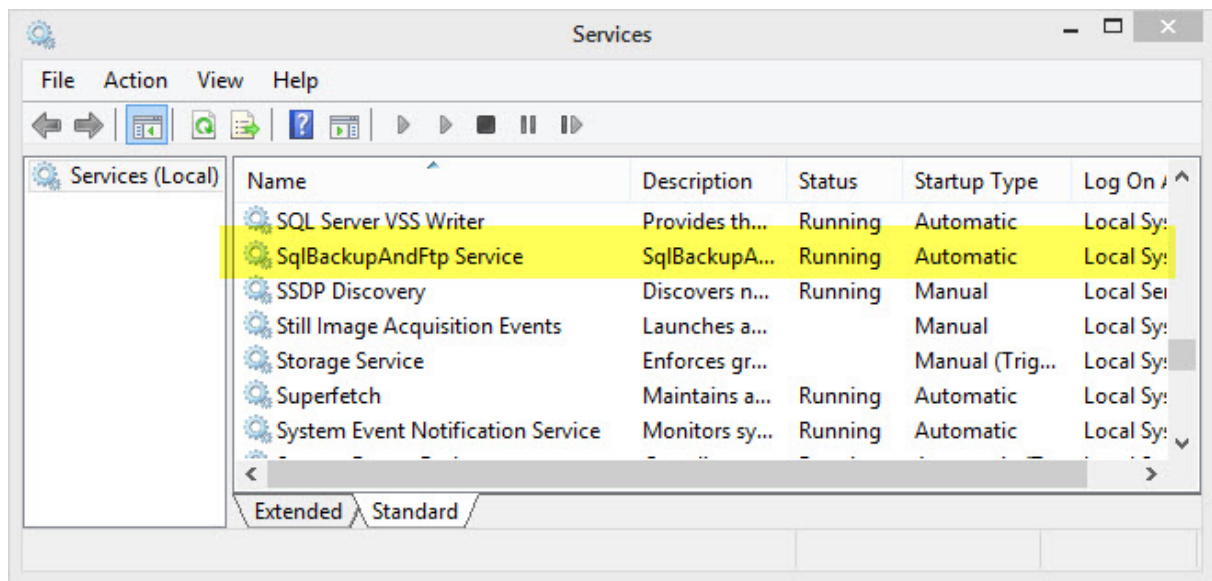
**SQLBackupAndFTP Backup Schedule**

On the main screen click Run Now to verify that the backup is created correctly. Open the destination backup folder on STATION2 and confirm that the backup file exists in the folder. Click Save at the top to save the job to the desktop; a prompt will appear requesting the Windows user name and password. This information is required to run SQLBackupAndFTP as a Windows Service. Blank passwords are not allowed.



SQLBackupAndFTP Main Screen

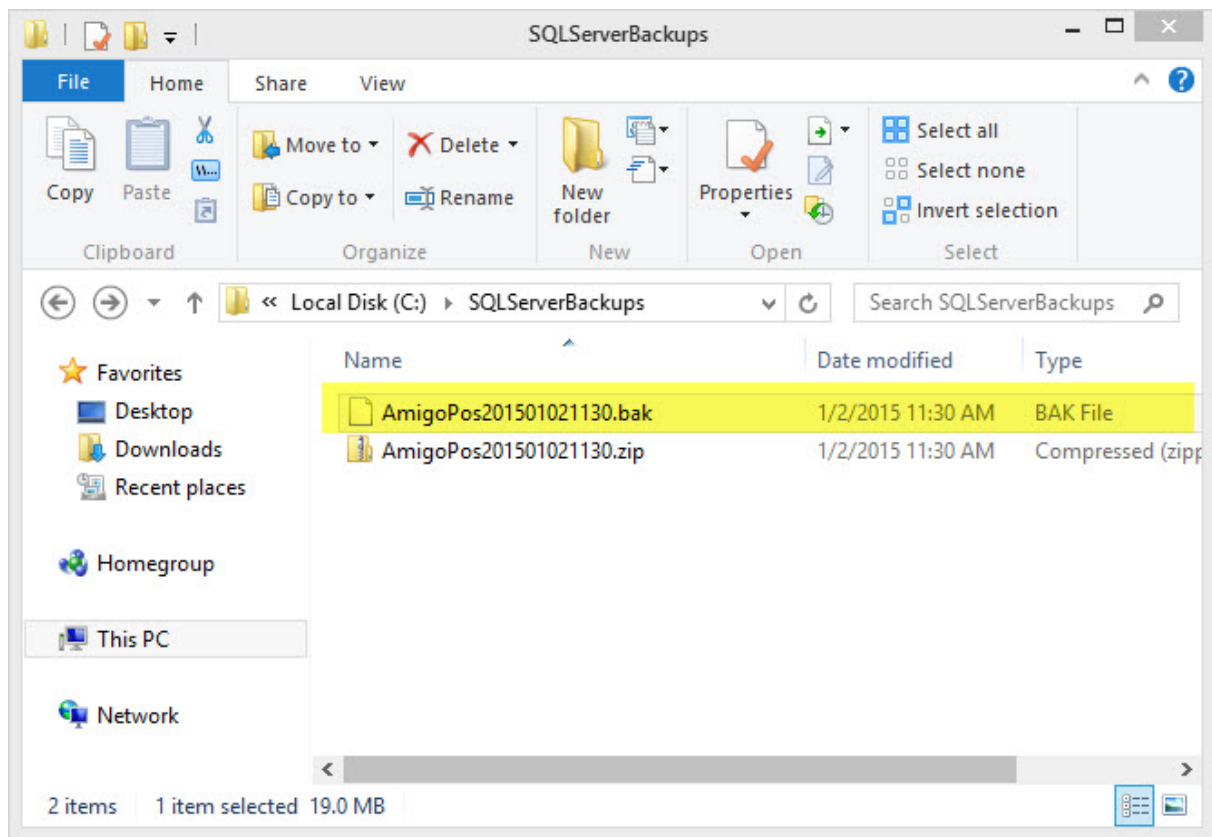
SQLBackupAndFTP runs as a Windows service and can be viewed by running the Windows Control Panel/Administrative Tools/Services applet.

**SQLBackupAndFTP Windows Service**

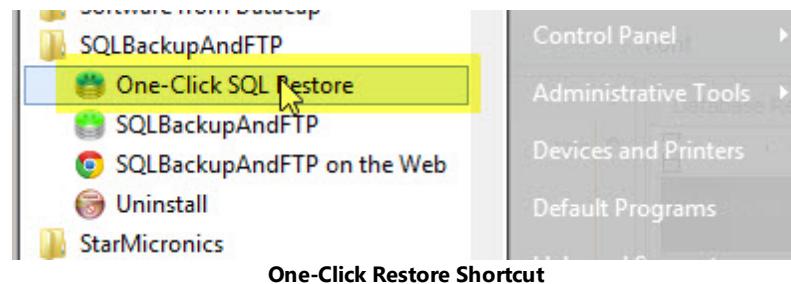
### 13.5.2 Database Restore

Review the previous topic to install and configure SQLBackupAndFTP on the main pos station. SQLBackupAndFTP offers single-click restore. First locate the zipped backup file in the backup folder and unzip the file. The uncompressed file has the .bak extension.

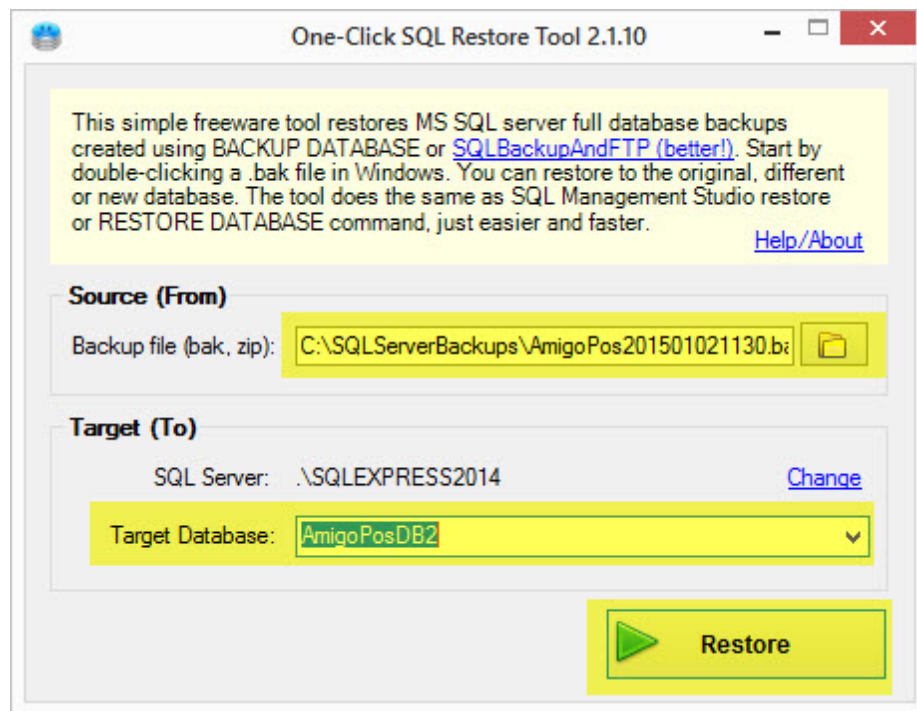




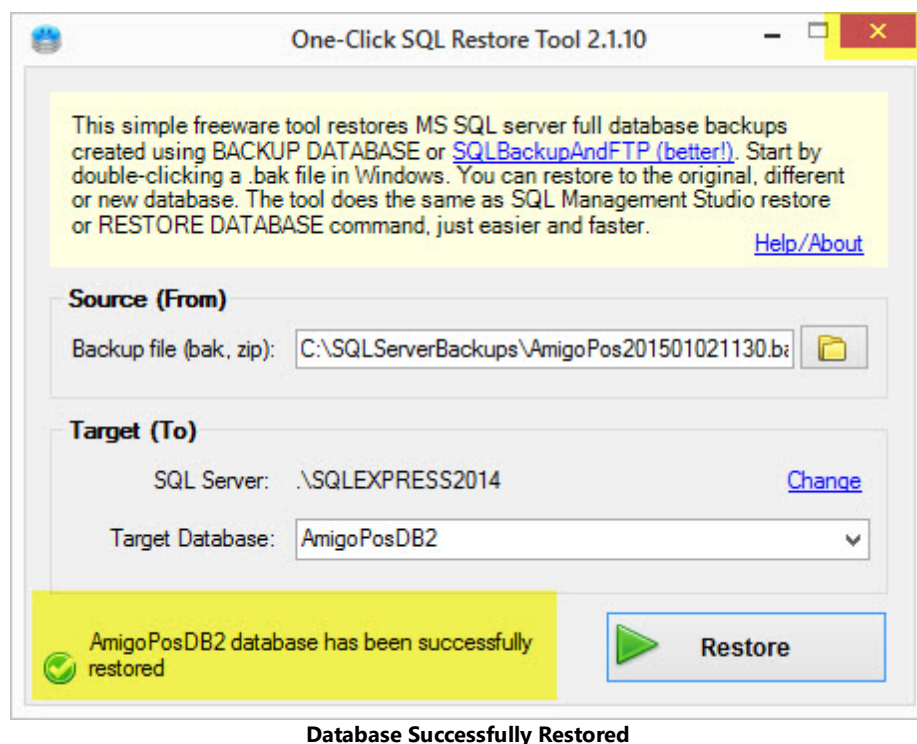
Locate the One-Click SQL Restore shortcut in the SQLBackupAndFTP program group and click to run.



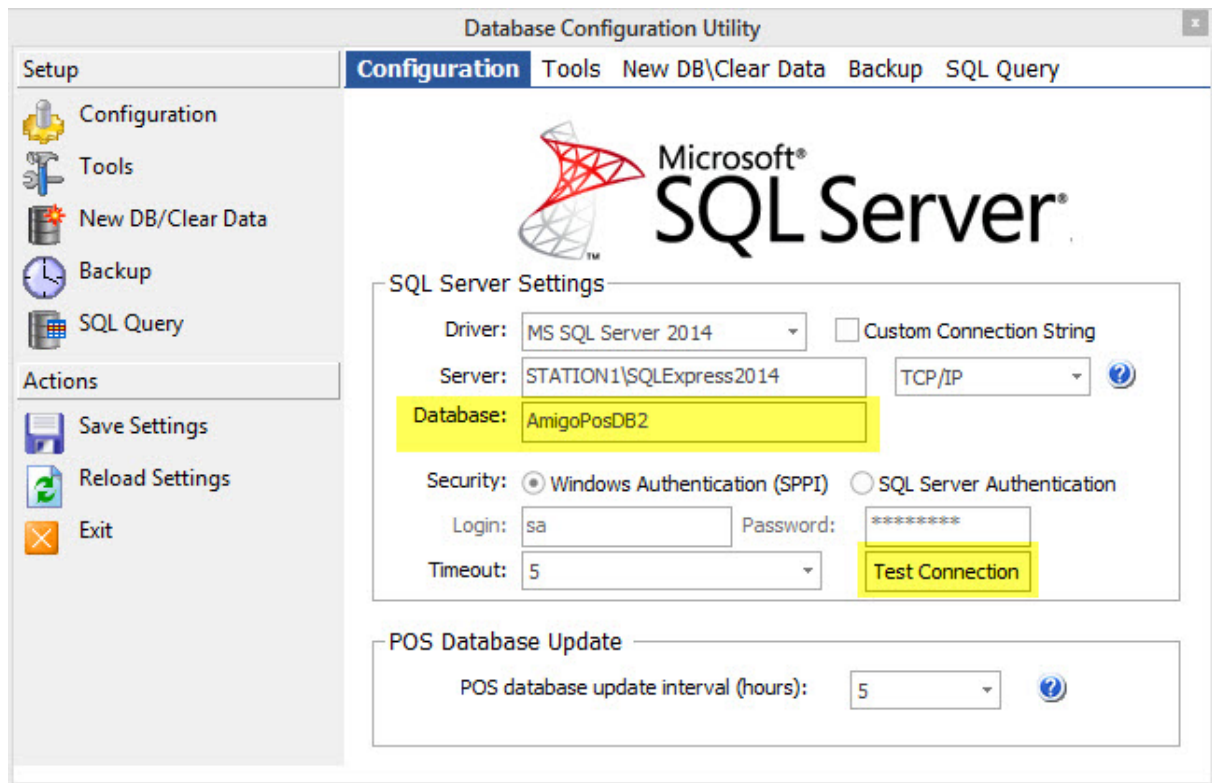
Click the folder icon and browse to the backup folder. Select the backup file and click OK. Verify that the AmigoPOS SQL Server Instance is selected and change the database name to a different database name that has not been used previously. Click Restore.



Review the results at the bottom left to verify that the database has been restored properly and exit the One-Click Restore Application.



Open the AmigoPOS Database Configuration Utility from the desktop shortcut and change the database name to the new name entered above. Click Test to save the settings and check the database connection.

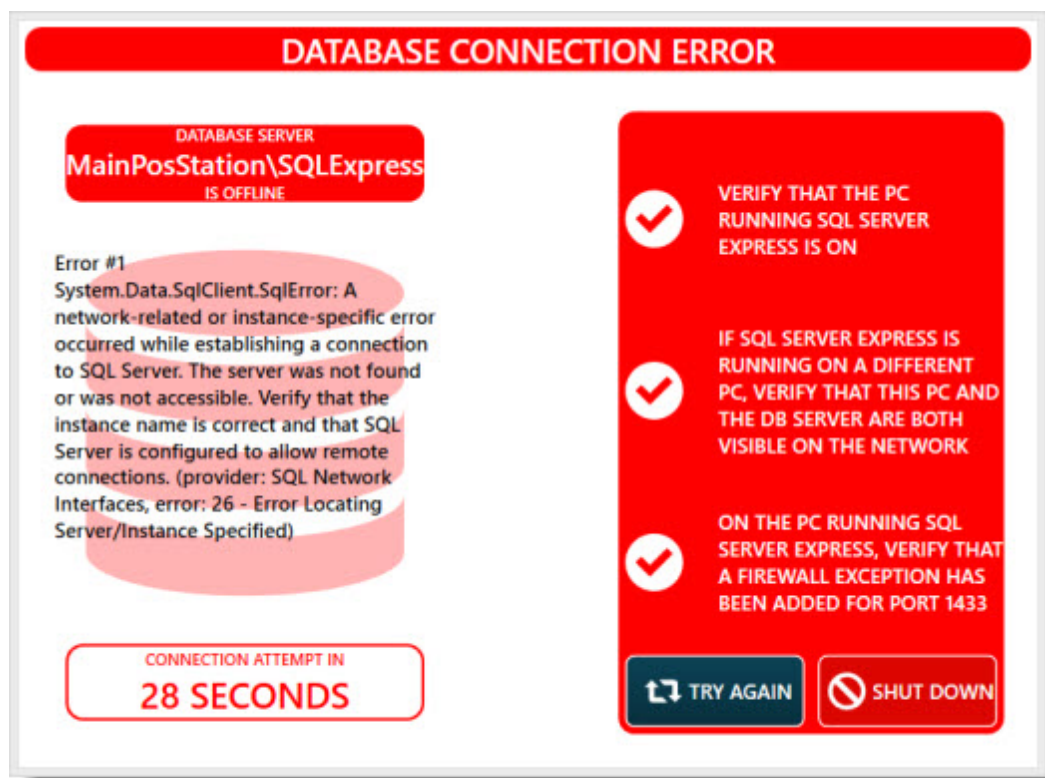


**Amigo Pos Database Configuration Utility**

## 13.6 Troubleshooting

AmigoPOS will attempt to connect to SQL Server at program startup. If the connection fails, the Connection Error message will appear as shown below. Click Retry and complete the following steps in order.

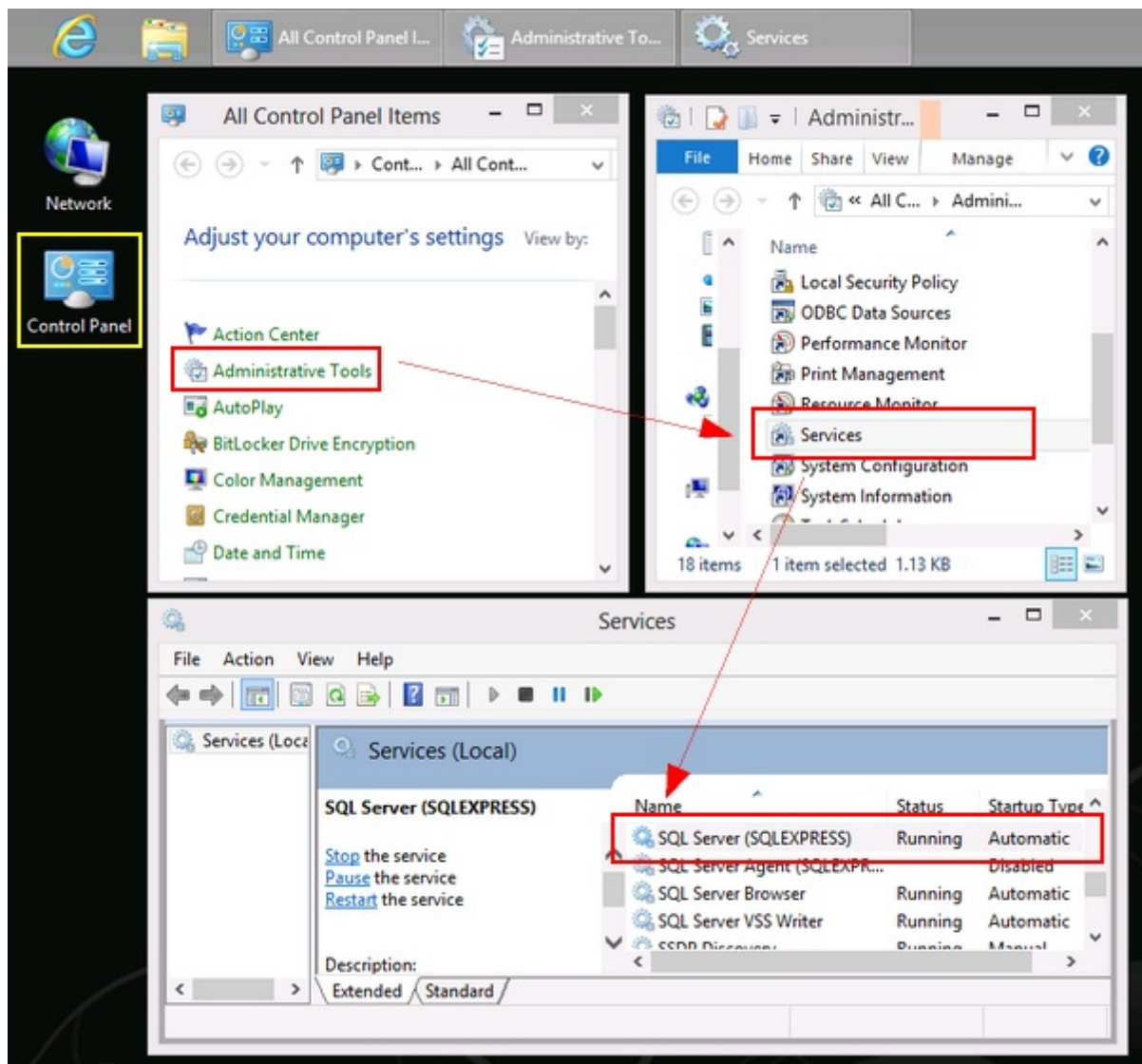
1. [Verify that the SQL Server Express instance is running](#) <sup>589</sup>
2. [Verify that the firewall exceptions are correct](#) <sup>590</sup>
3. [Verify the TCP Port Setting](#) <sup>591</sup>
4. [Verify that SQL Native Client is installed](#) <sup>593</sup>



Database Connection Error

**Verify that the SQL Server Express instance is running**

AmigoPOS will stop and restart the service to complete the installation. In some cases (usually on 32-Bit workstations), the service restart may be delayed. Either reboot the workstation or manually check to verify that the service is running in Windows Control Panel (small icon view) > Administrative Tools > Services > SQL Server (SQL Express). The Startup Type should be set to Automatic and the Status should be set to Running. If the service is not running, double-click on the service and click the Start button.

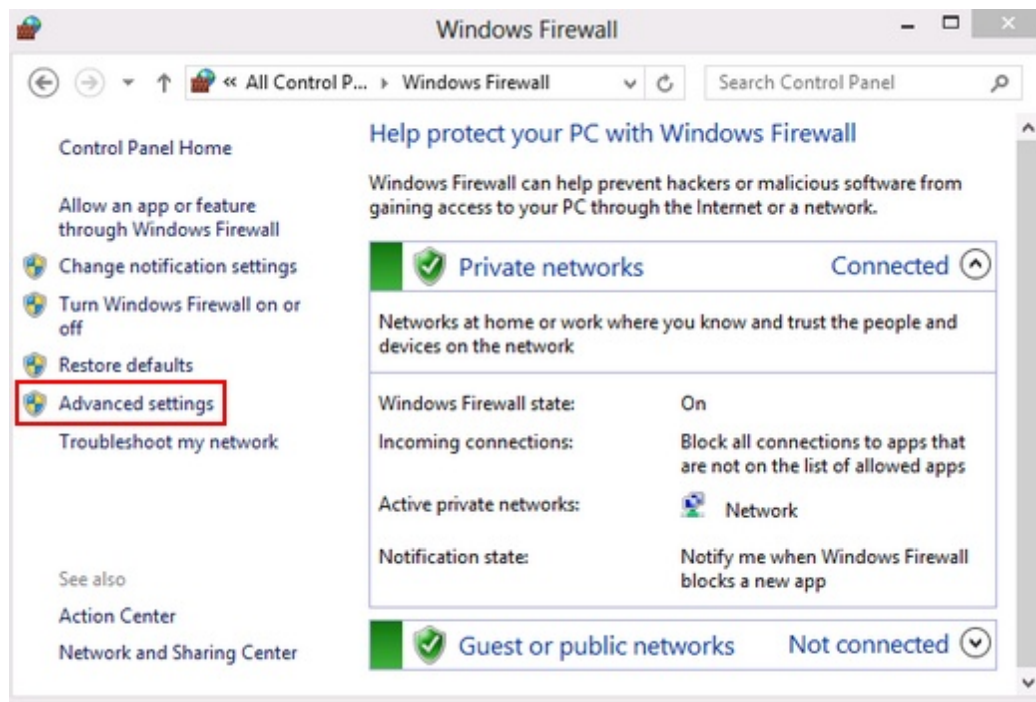


Administrative Tools &gt; Services

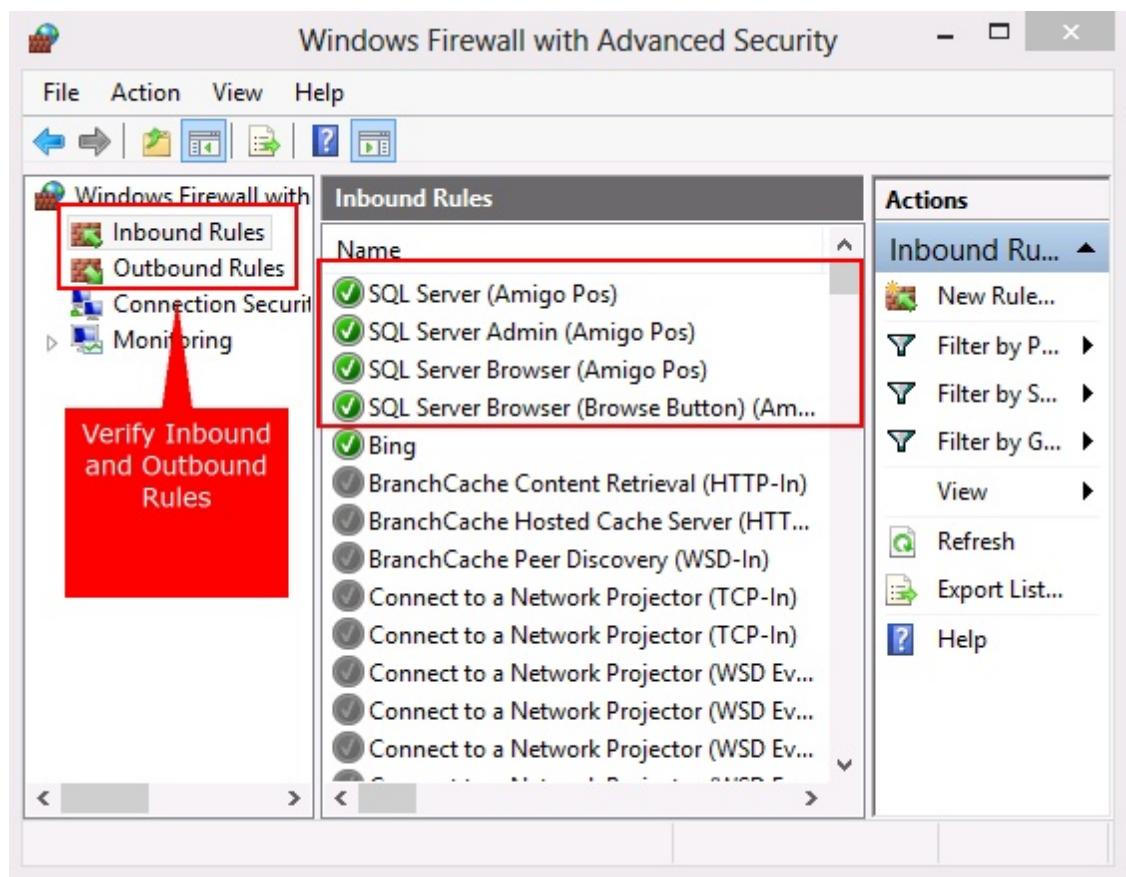
**Verify that the firewall exceptions are correct**

AmigoPOS will attempt to enter the firewall rules during installation. Verify that there are 4 exceptions each for Inbound and Outbound rules, as shown below. If not, manually run the firewall batch file located in the program installation directory (C:\Program Files\Amigo Point Of Sale) by right clicking on the files named OpenSQLServerPort\_xx.bat and selecting Run As Administrator.





Windows Control Panel &gt; Windows Firewall

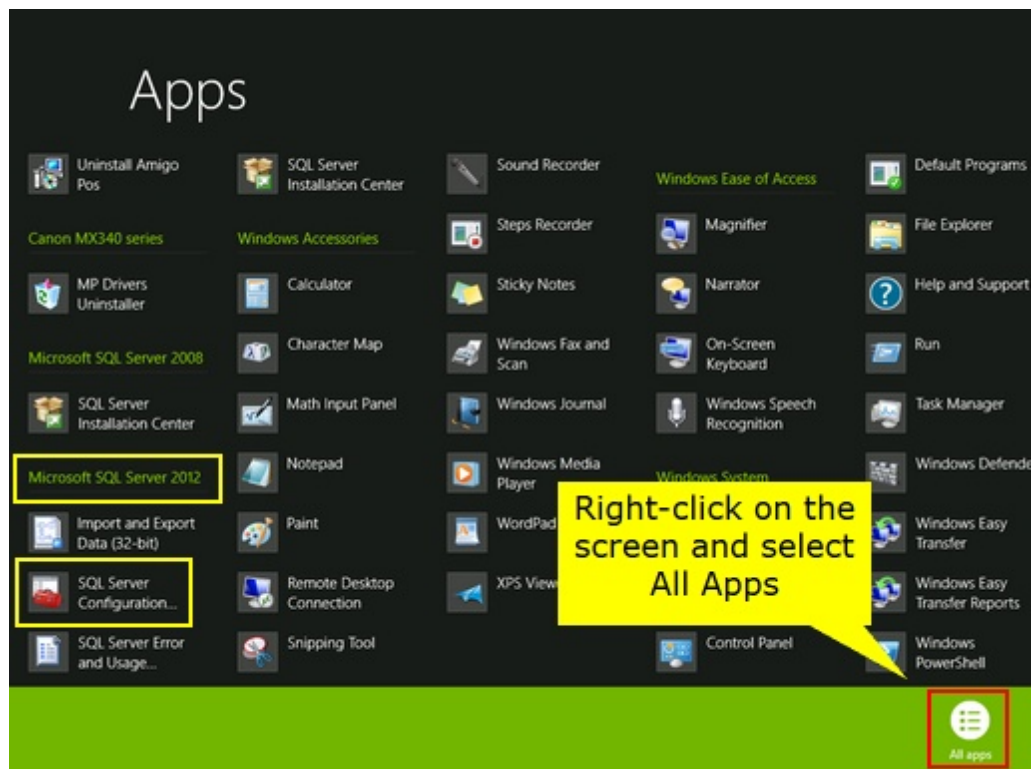


Windows Firewall Advanced Settings

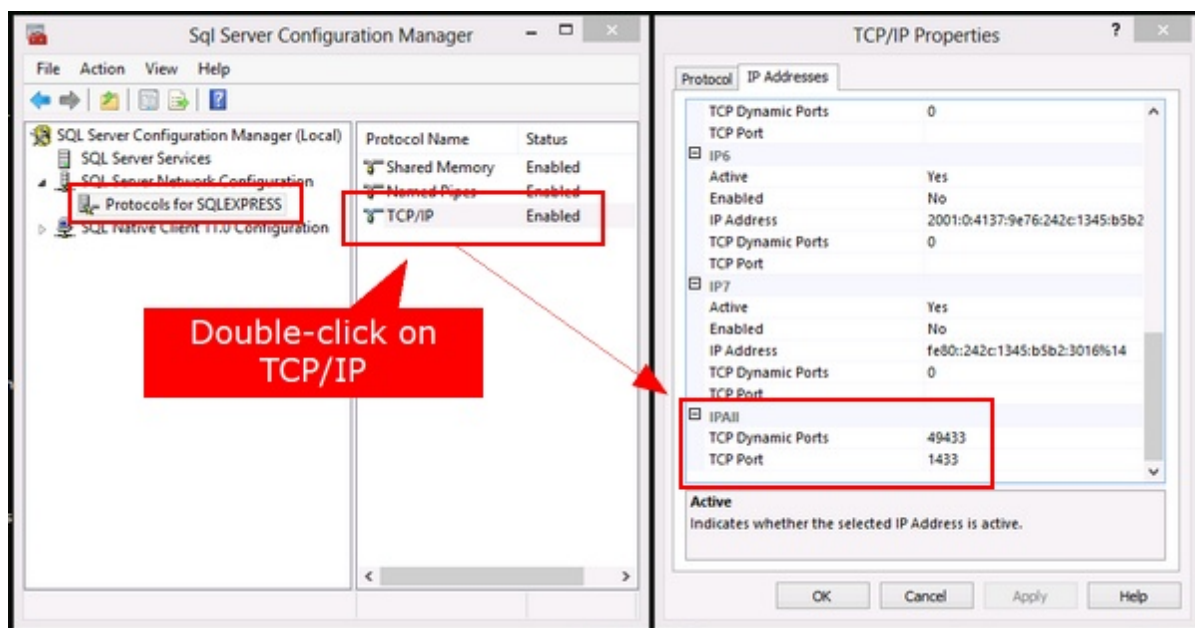
**Verify the TCP Port Setting**

AmigoPOS will attempt to configure SQL Server to use port 1433 during installation. Verify that this setting was applied correctly in the SQL Server Configuration Manager by clicking the shortcut in Windows Start > All Apps > Microsoft SQL Server 2012.

1. Expand SQL Server Network Configuration
2. Select Protocols for SQLEXPRESS
3. Double-click on TCP/IP to open the TCP/IP properties window
4. Click the IP Addresses tab
5. Scroll to the bottom and expand IPAll
6. Verify that the value of the TCP Port setting is 1433
7. Note that SQL Server must be restarted (or the workstation can be rebooted) for changes to take effect.



**Windows Start Screen Showing All Apps**



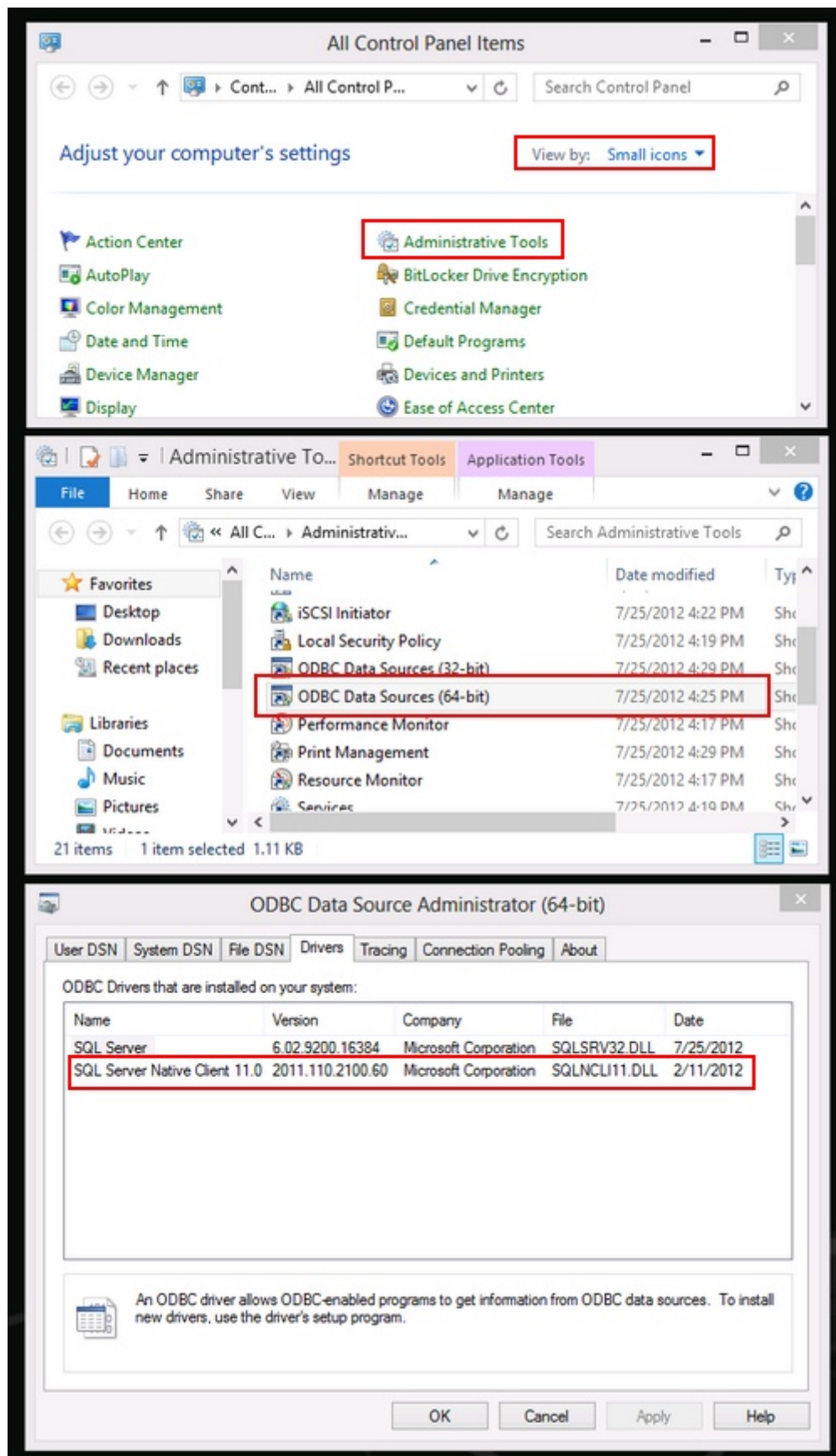
SQL Server Configuration Manager

#### Verify that SQL Native Client is installed

If the connection fails from a workstation that is not running SQL Server, verify that SQL Native Client was installed successfully. Open Administrative Tools in Windows Control Panel and click the Data Sources or Data Source (64) link. Select the Drivers tab to view the list of installed drivers. If SQL Native Client is missing, run the AmigoPOS installer again and select the SQL Native Client version that matches the version of SQL Server Express, or download and install separately from either link below:

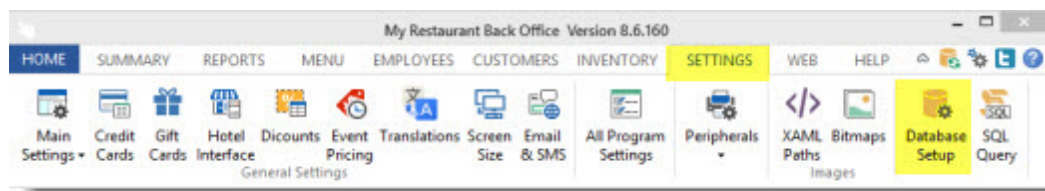
- SQL Server 2008 Native Client (32-bit): <http://go.microsoft.com/fwlink/?LinkID=188400&clcid=0x409>
- SQL Server 2008 Native Client (64-bit): <http://go.microsoft.com/fwlink/?LinkID=188401&clcid=0x409>
- SQL Server 2012 Native Client (32-bit): <http://go.microsoft.com/fwlink/?LinkID=239647&clcid=0x409>
- SQL Server 2012 Native Client (64-bit): <http://go.microsoft.com/fwlink/?LinkID=239648&clcid=0x409>





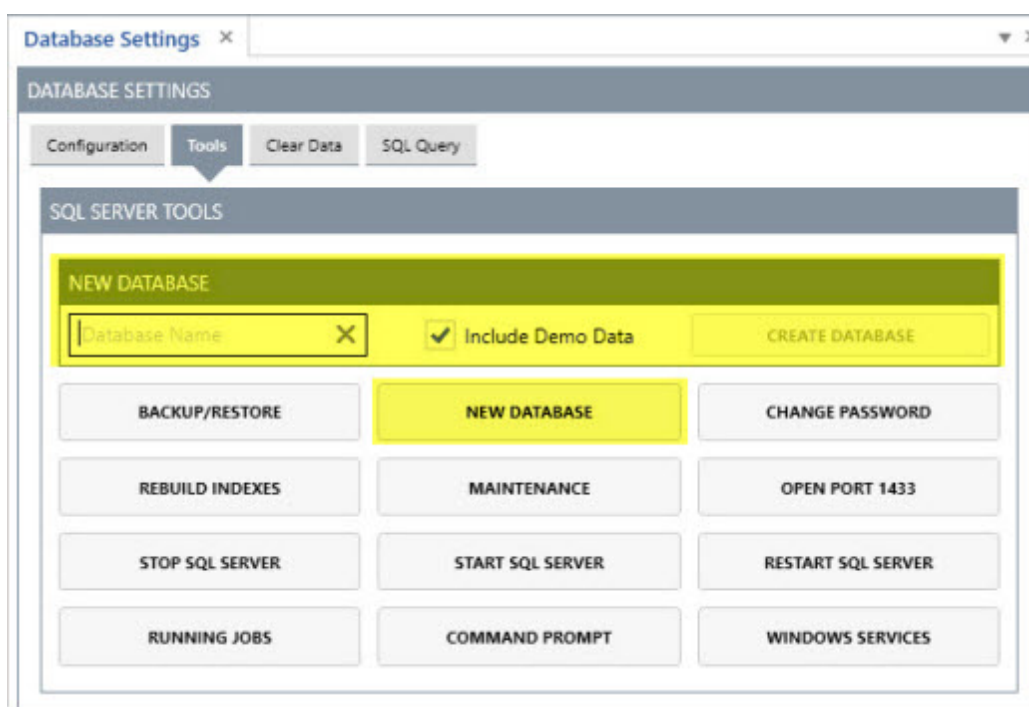
## 13.7 New Database

A SQL Server database can be started by opening the database configuration utility or starting back office directly from the shortcut (not by logging into the front end).



**Back Office/Settings/Database Setup**

Click the **New DB/Clear Data** tab and enter a name for the new database. Do not enter the name of an existing database (even if it is not currently in use) and do not include a file extension. SQL Server will create the new database in the current data folder on the server. Check the Clear Demo Data box to clear the database of all demo data. When the database is cleared of demo data, log in with #2 to access back office. Add at least one menu category before attempting to add new menu items.



**Database Configuration Utility**

A confirmation dialog will appear and the application will shut down after the new database is created. The application will begin using the new database the next time the application is run. Be sure to set the new database name on other pos stations and back office computers.

## 13.8 Synchronization

### System Database

The AmigoPOS installer prompts the user to enter a unique name for the system database during installation. This database is used to hold all data, including menus, orders, employees and most system settings. When working in back office on any pos station, AmigoPOS connects directly to this database. When working in the front end, AmigoPOS uses the locally cached copy of the database for most functions except order and time sheet queries. The system database should be backed up to a different computer at regular intervals to provide a recent backup in case of hardware failure. The database location

### Database Synchronization

To minimize network traffic and speed data access, a locally cached copy of the system database is created on each pos station on the network. This database is routinely discarded and replaced to reflect any changes to the main system database. The update interval is defined in Back Office - Program Setup - Database Setup, as shown below. The update occurs immediately after user login. During this update, a small message will appear at the bottom of the screen indicating that the user should wait until the database synchronization finishes before continuing. The update may take between 5 and 30 seconds, depending on the database location and network conditions.

The screenshot shows the 'Main Settings' window with the 'General Settings' tab selected. Under the 'GENERAL SETTINGS' section, the 'Database' category is expanded and highlighted. The 'Database Update Interval' is set to 1. Below this, the 'Enable Sound Alert\*' is set to 'Yes' and the 'Sound Alert File\*' is 'notify.wav'. A 'Play Sound' button is visible. At the bottom, a section titled 'Database Update Interval' states: 'Interval in hours to synchronize the local database with the server database at user login'.

Database Update Interval

### Speed Up Database Synchronization

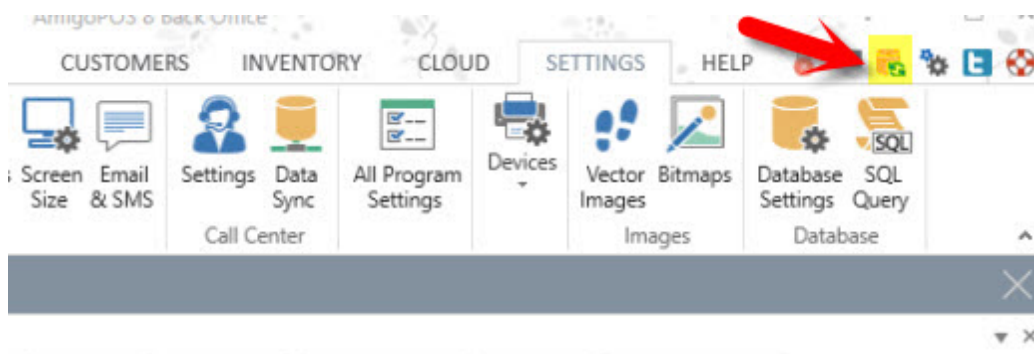
The time required to perform database update varies with the size of the database and the number of images stored in the database, and is reliant on a stable network connection. To optimize database synchronization and minimize the time required and network traffic generated during the synchronization, delete any unneeded menu items (regular, bar, pizza and retail), images, users and other data that is not used. Be sure to compact the database after deleting these items to recover the unused space. Sales history, transactions history and other logs do not affect database synchronization.

### Forced Database Synchronization

In some cases the user may wish to update the database immediately, for example, if editing a menu in back office you may wish to view the changes on the order entry screen immediately while both back office and the front end are open. Click the instant database update button to update the database immediately. This button is the first button on the database update toolbar in back office, as shown below. **Note that instant database updates are performed on the local computer only.** Click the Force Update button to synchronize all pos stations at the next user login.

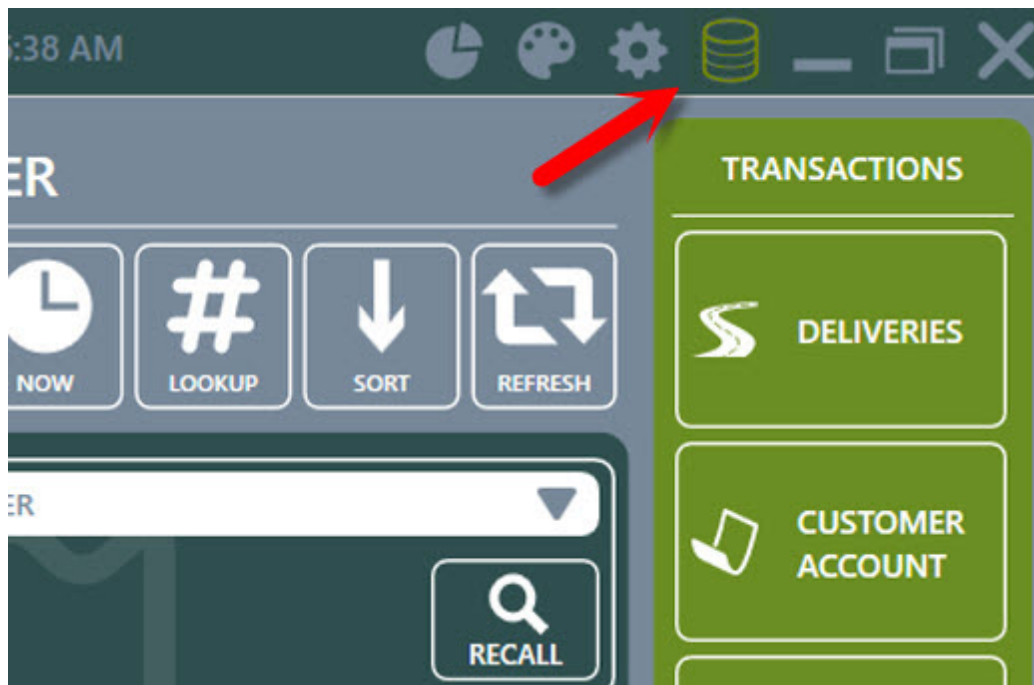
### Forced Database Update Keyboard Shortcuts

Click the **Update POS Stations** button at the top right to force pos stations to perform a database update at the next user login.



Force Database Update At Next User Login

In addition, any pos station can force an update by clicking the database icon at the top right.



## 13.9 Manual Installation

### 13.9.1 Overview

#### Installation Order

1. [Download and install Microsoft SQL Server Express](#) <sup>598</sup> on one pos station
3. Choose one of the following:
  - [New Database](#) <sup>606</sup> Use the AmigoPOS demo SQL Database
  - [Existing Database](#) <sup>612</sup> Import your existing MS Jet database (from version 7) using the Microsoft SQL Server Migration Assistant
4. [Configure SQL Server to accept network connections](#) <sup>622</sup>
5. [Configure the database settings](#) <sup>625</sup>

### 13.9.2 Install MS SQL Server Express

**\*Note that this help topic is included for reference when manually installing SQL Server Express. The AmigoPOS installer has the capability to automatically download and install MS SQL Server Express.**

## Prerequisites

The following components are required by MS SQL Server 2008 R2

- Download and install [Microsoft .Net Framework 3.5 SP1](#) (already installed on Windows 7)
- Download and install [Windows Installer 4.5](#) (already installed on Windows 7)
- Download and install Windows PowerShell 2.0 (already installed on Windows 7)
  - [XP](#)
  - Vista ([32 bit](#), [64 bit](#))
  - Server 2003 ([32 bit](#), [64 bit](#))
  - Server 2008 ([32 bit](#), [64 bit](#))

#### Download SQL Server Installer

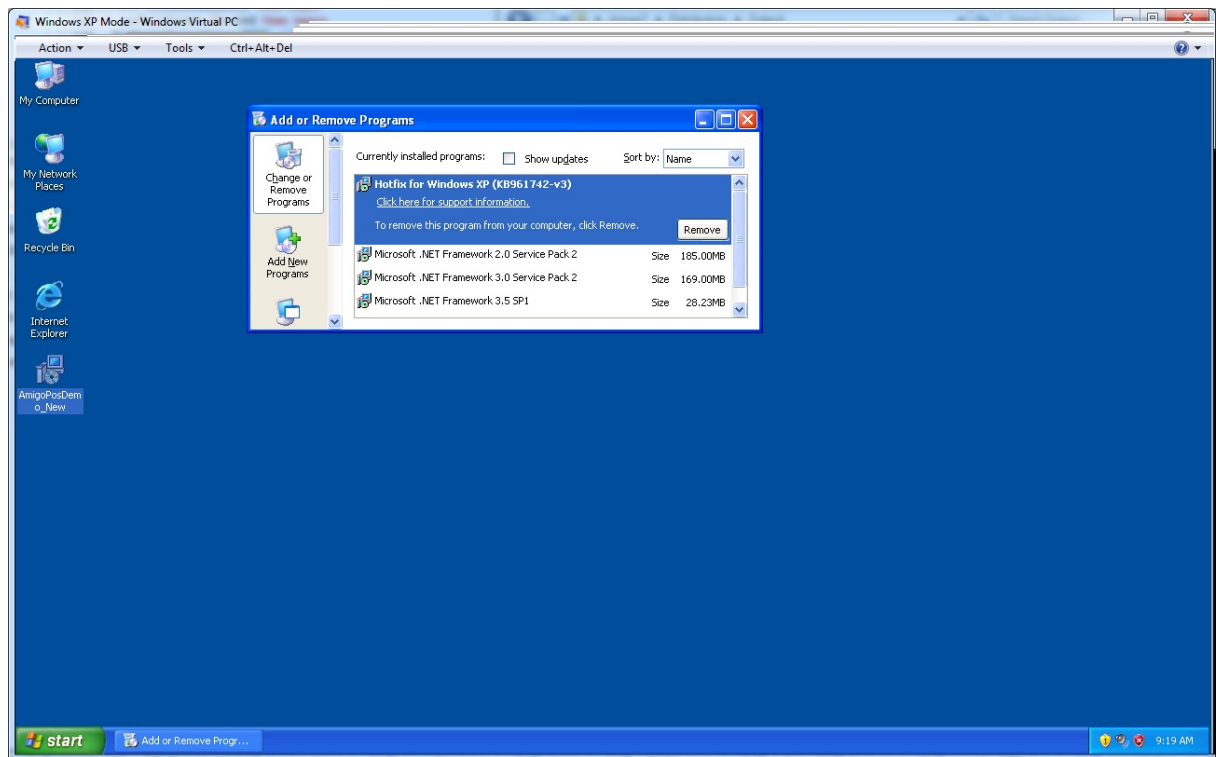
Download MS SQL Server Express and MS SQL Server Management Studio from Microsoft, currently located at [SQL Server 2008 R2 Express with Management Tools](#). If the prerequisites (listed above) are not installed, you will be prompted to install them before installation can proceed.

#### MS SQL Server Management Studio

MS SQL Server Management Studio is a separate program included in the installation package and is used to maintain the database server. Note that MS SQL Server Management Studio does not have to be installed on the same PC as SQL Server, and can be installed on multiple computers if necessary. In addition, MS SQL Server Management Studio can be installed without installing SQL Server, by checking only **Management Tools-Basic** the box in the **Features Selection** screen shown below.

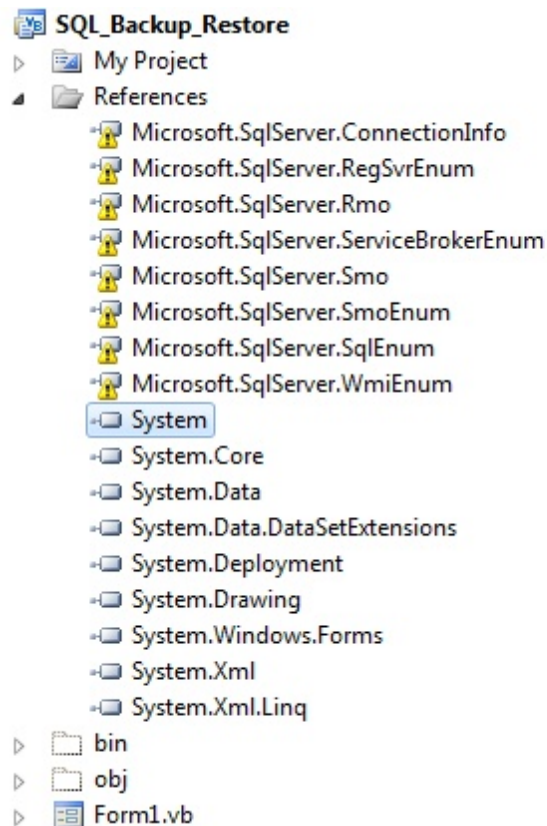
## Installation

The following screenshots are taken from a typical SQL Server Express 2008 R2 installation. Double-click on the installer to launch the SQL Server Installation Center. Select **New installation or add features to existing installation**.



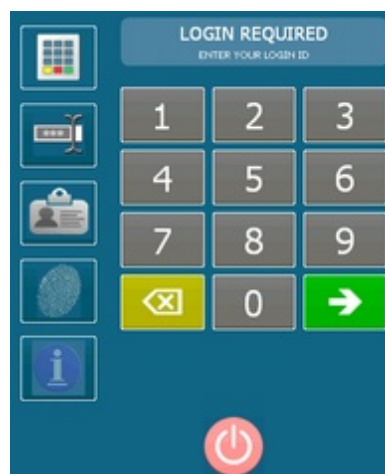
### MS SQL Server Express R2 Installation Center

Review any Failed or Warning messages and follow the instructions to resolve any issues. Click **OK** to continue after all Setup Support Rules are passed. Note that the [Windows Firewall](#)<sup>[624]</sup> can be configured after installation to allow an exception for SQL Server (to allow connections from remote workstations).



#### Setup Support Rules

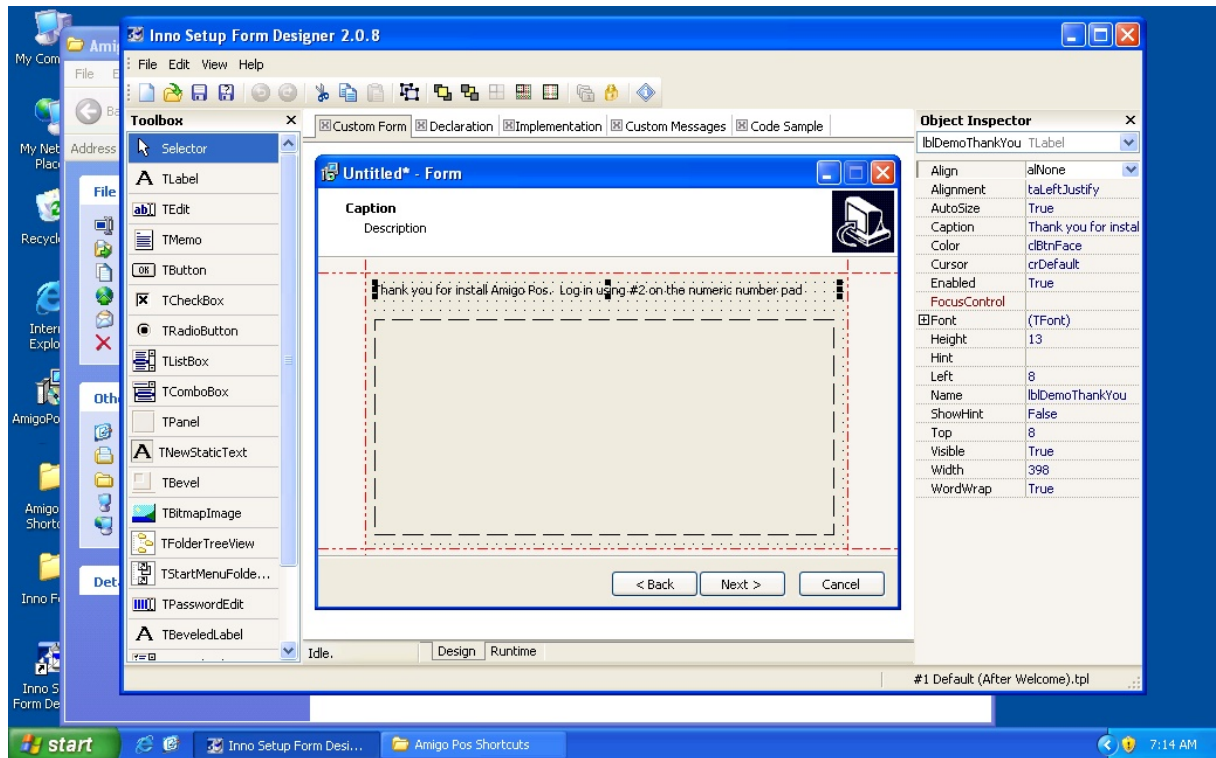
Select **Database Engine Services** and **Management Tools-Basic** and click Next to continue. Note that the Management Tools-Basic option includes SQL Server Management Studio Express. You may also installation only the management tools if SQL Server Express is already installed on another workstation.



#### Feature Selection

Select **Named Instance** if it is not already selected and click Next. The default name SQLExpress does not have to be changed.

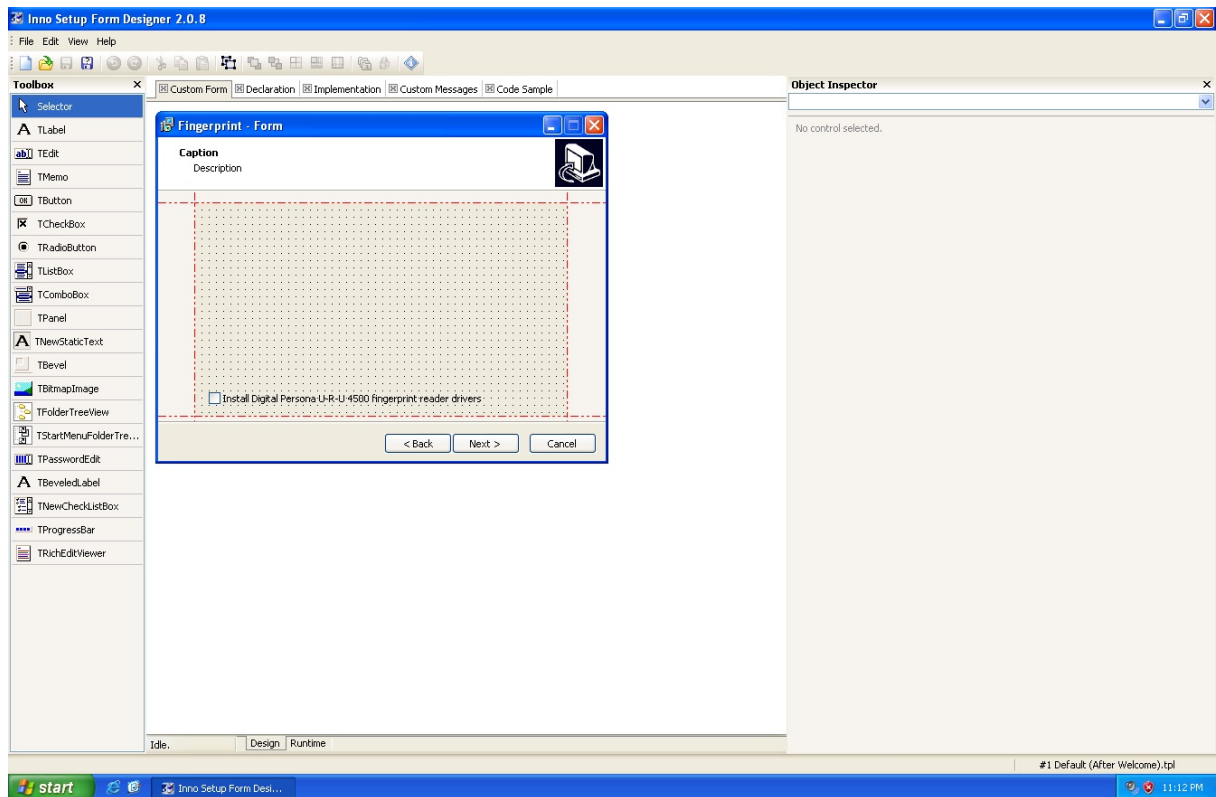




Instance Configuration

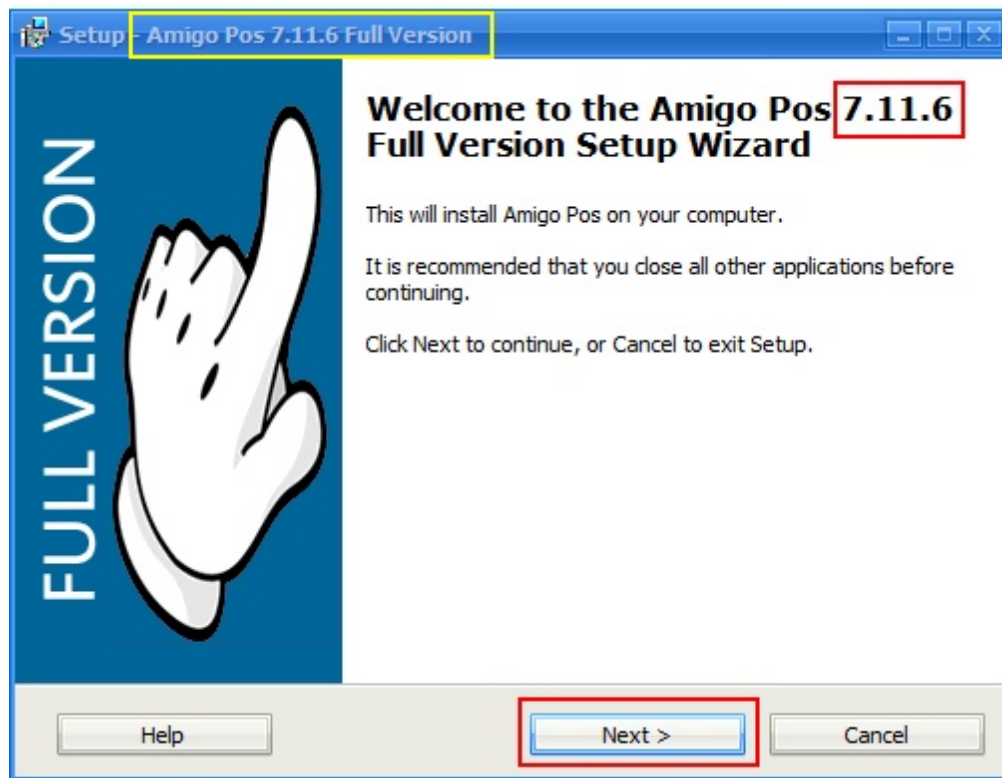
Verify that **SQL Server Database Engine Startup Type** is set to **Automatic** so that SQL Server starts automatically whenever the workstation is rebooted.





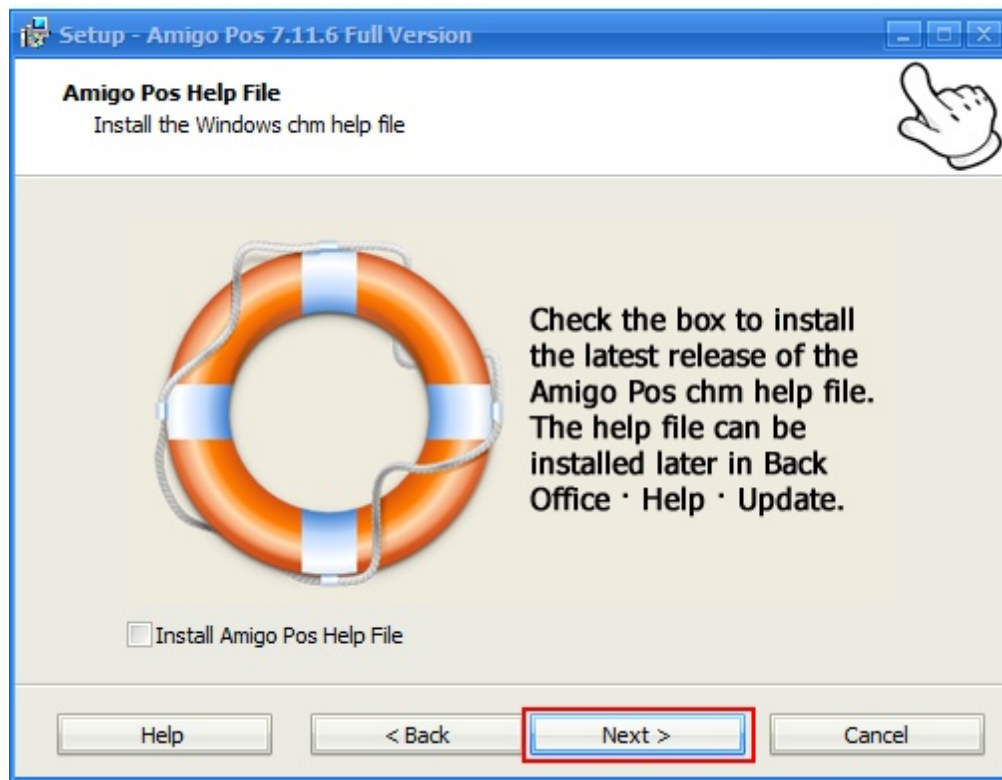
### SQL Server Service Accounts

Use **Mixed Mode** authentication and specify a password. This password is used by the built-in **sa** account. You may also add the currently logged in user to SQL Server administrators, or click Add... to add a different user. Users may be added later using SQL Server Management Studio Express. Click **Next** to continue.

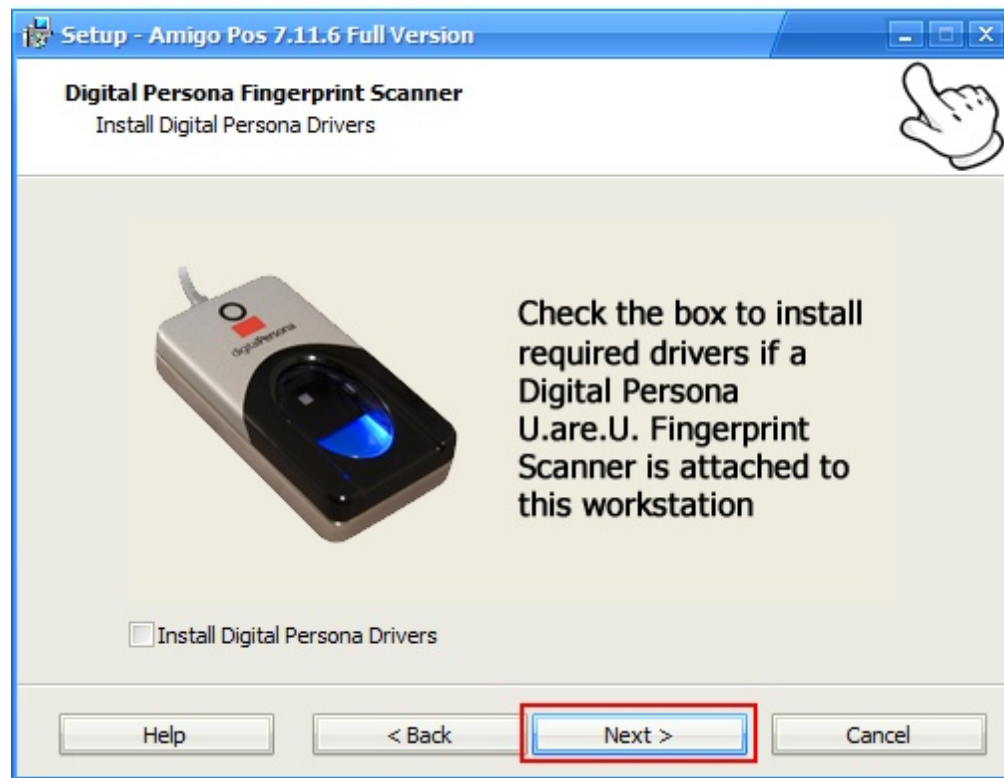


**Authentication Mode**

Click Next at the Error Reporting screen to continue.

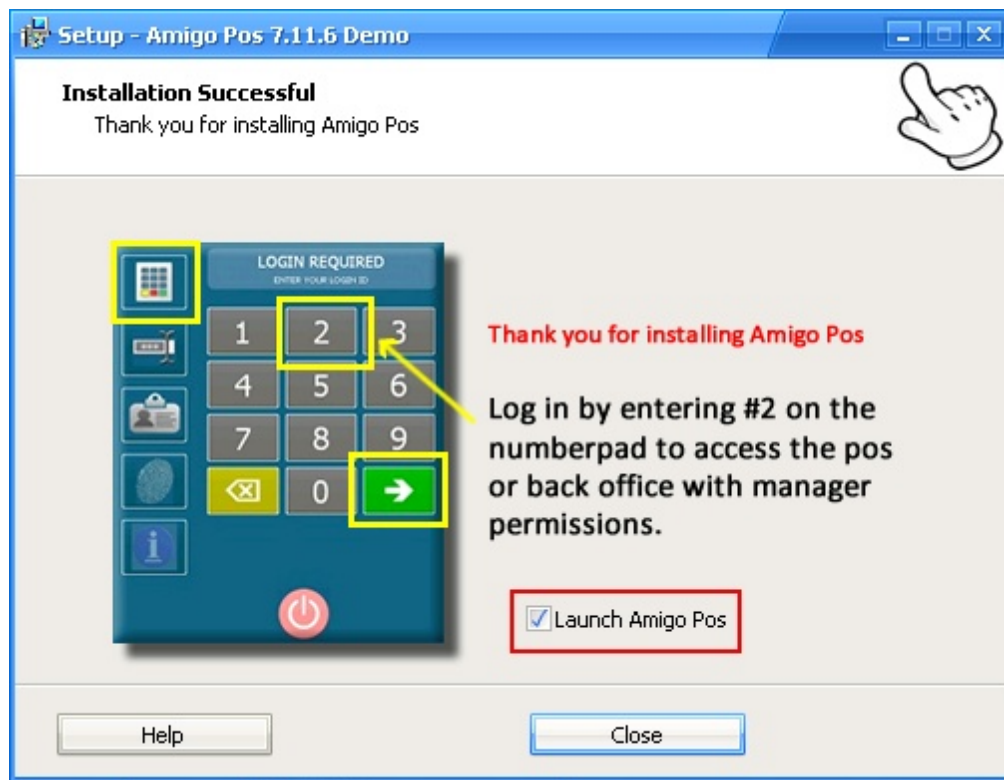
**Optional Error Reporting**

Do not interrupt the installation process, which ranges from 5-10 minutes depending on the processor speed and memory.



**Installation Progress**

The installation should complete successfully with no errors or warnings. Click Close, close the Installation Center and reboot the workstation. Any errors are logged to the summary log file located in the path shown at the top of the screen. If errors exist, make a note of this path



Installation Complete

### 13.9.3 Demo Database

When starting with a new database, the migration utility is not required. After installing SQL Server Express and SQL Server Management Studio, complete the following steps to begin using the demo database (or blank database):

1. Download the SQL Database backup from the [drivers and utilities download](#) page at [amigopos.com](#). The database is available with or without demo data. The database without demo data has no menus and only one employee with manager permissions and login id #2. Unzip the database backup to a folder on the root drive, i.e. C:\SQL Backups.

Home Features Downloads **Support** Purchase Contact

> You are here: Support >> Driver Downloads

## Driver Downloads

### SQL DATABASE

- SQL Backup (with Demo Data)
- SQL Backup (Blank)

Either database can be restored within seconds using the **restore** eliminating the need to use the migration utility when starting with Unzip the file before restoring.

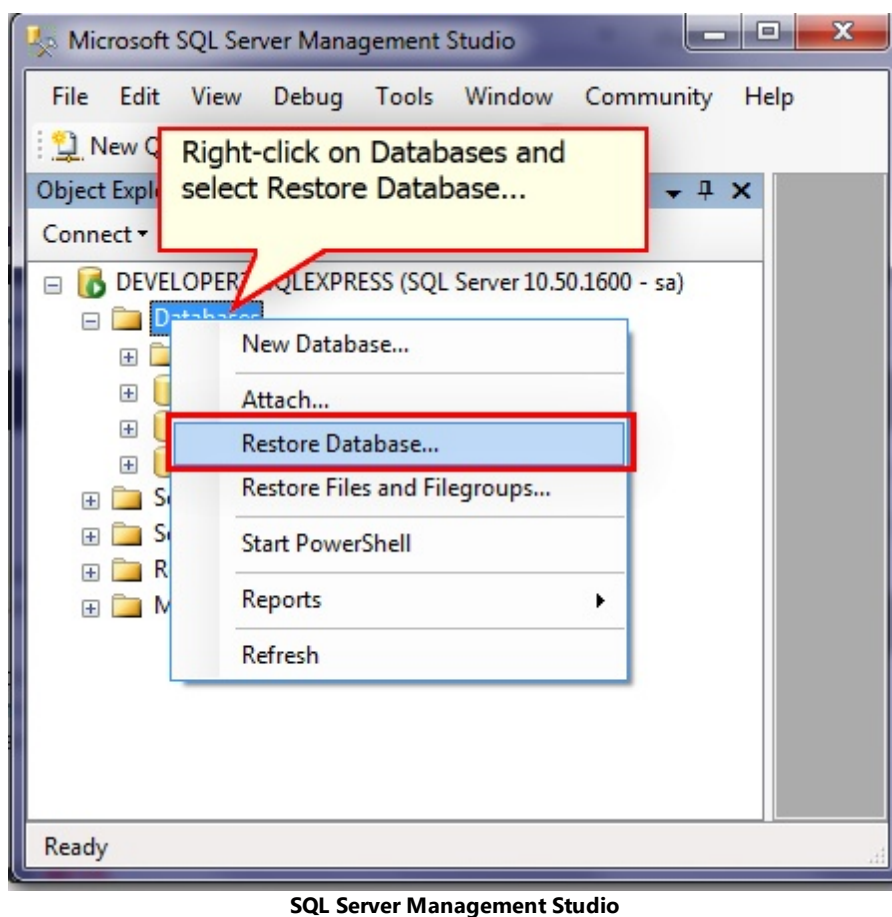
### QUICKBOOKS INTERFACE **BETA**

- Amigo Pos QuickBooks Interface v3 Installer (7/4/2010)

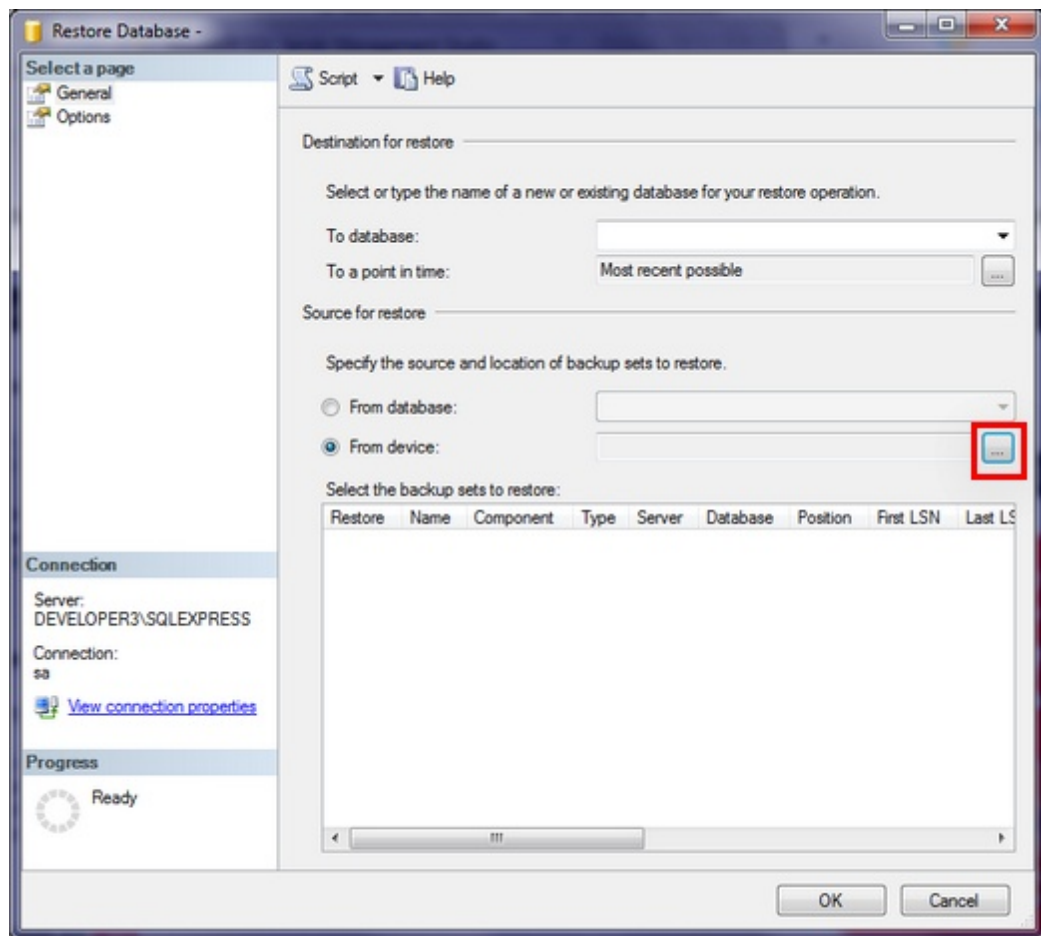
This application will run on any version of Windows that supports .

**Driver Downloads**

2. Open SQL Management Studio and connect to the database server. Right-click on **Databases** and select **Restore Database...**



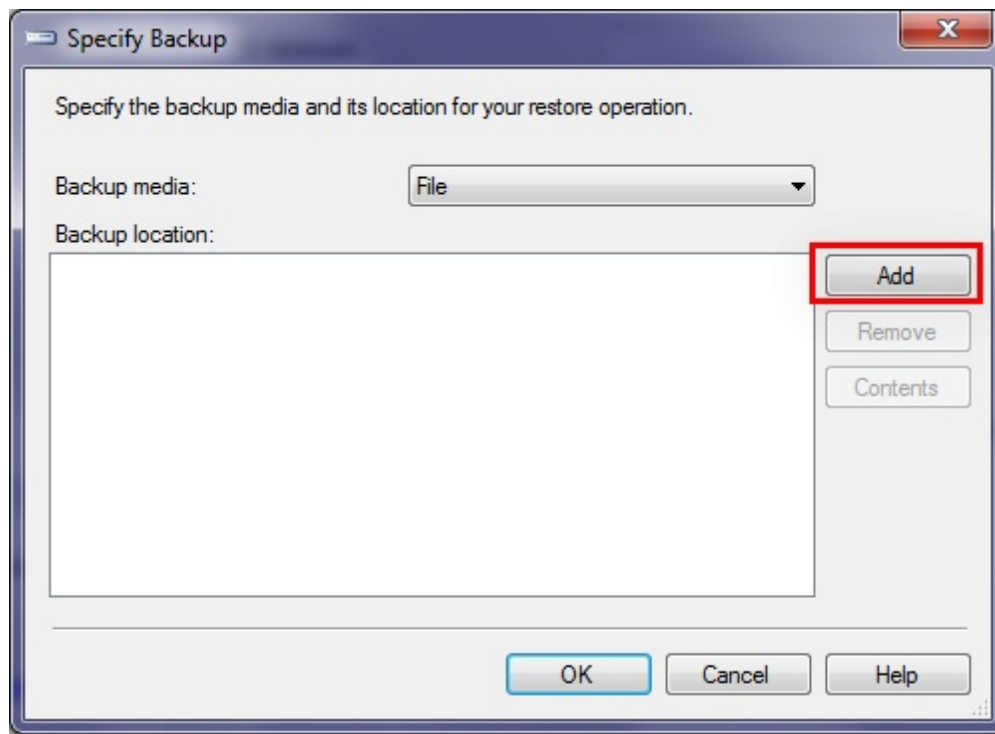
3. In the Restore Database dialog, select **From device** and click the **Browse** button



Restore Database Dialog

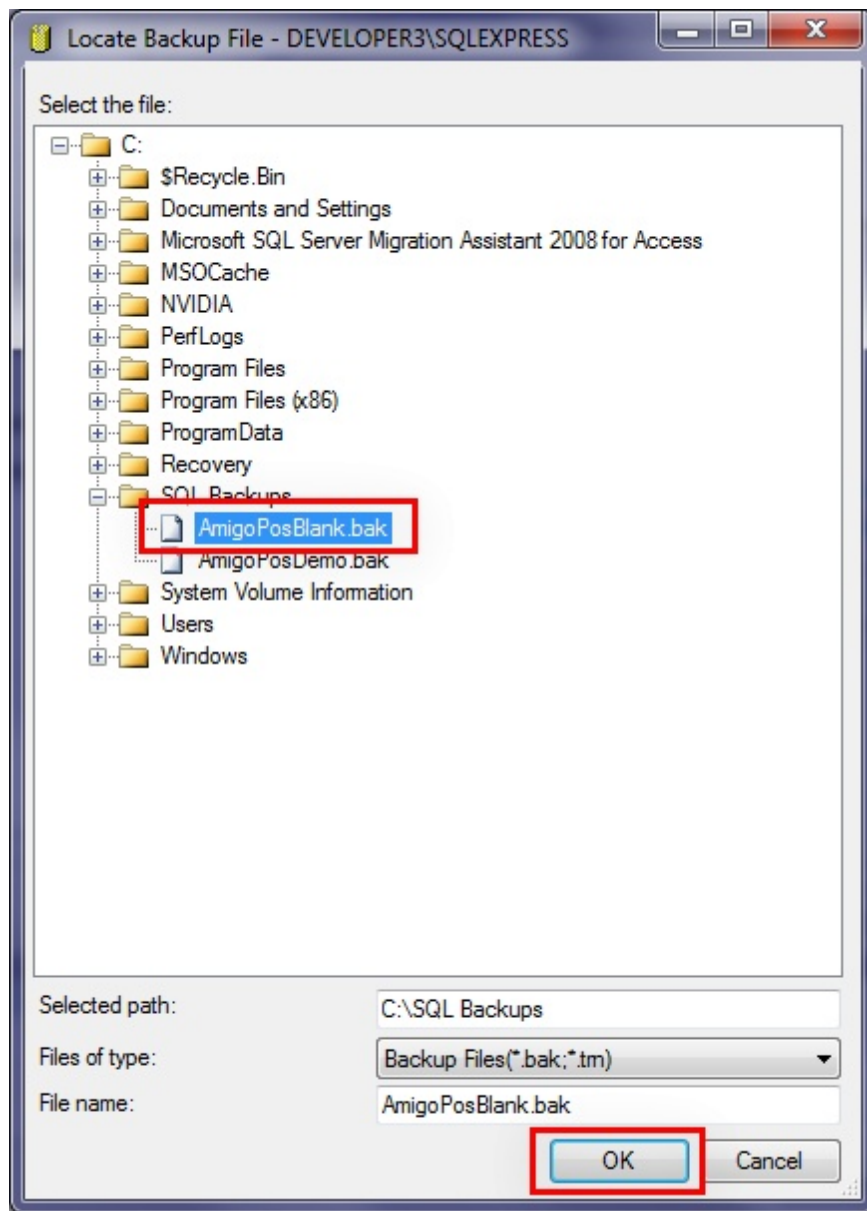
4. In the Specify Backup dialog, click **Add**.





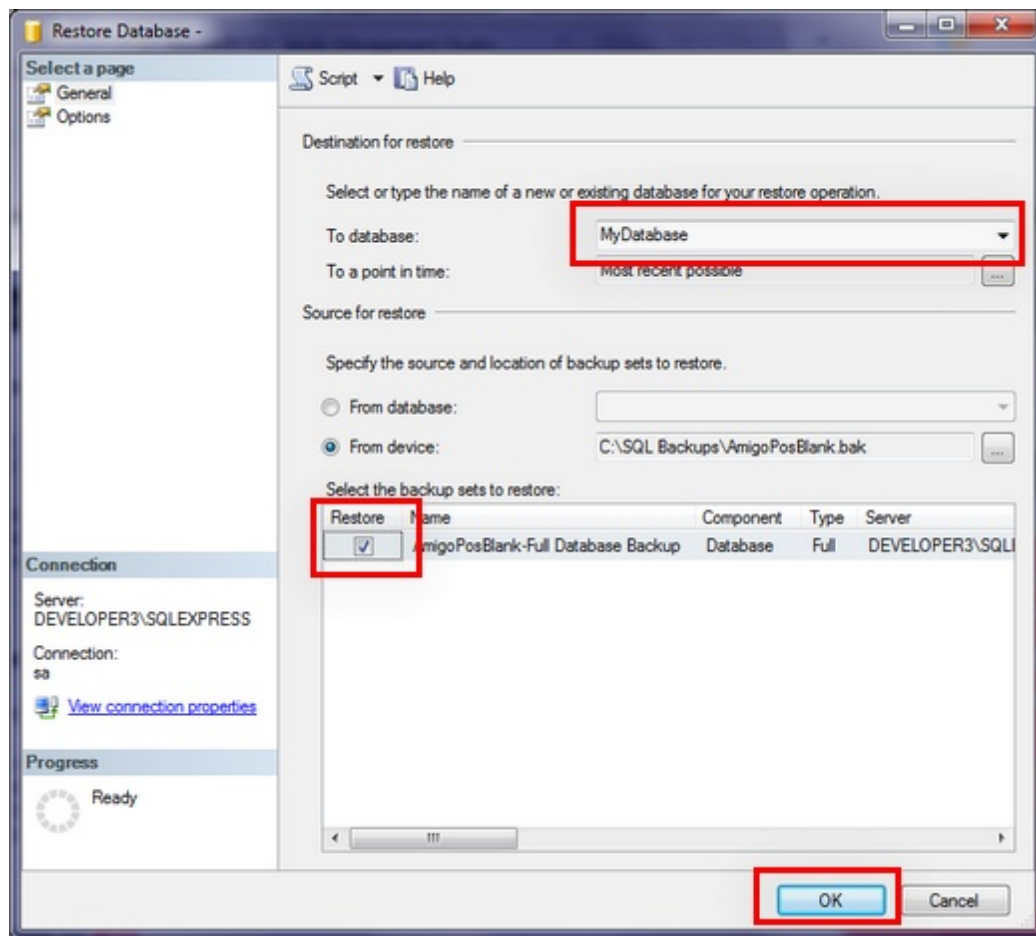
**Specify Backup**

5. Browse to the file that was unzipped in Step 1. Select the file, verify that the correct file name appears in the **File name** box and click **OK**. Click **OK** in the Specify Backup dialog to continue.



**Select Backup File**

6. Enter a name for the new database and check the box under the **Restore** Column. Click **OK** to restore the backup.



Restore Database Dialog

7. The database is now ready to use. Open the database configuration utility and enter the settings for the new database as described [here](#)<sup>[628]</sup>.

### 13.9.4 MS SQL Server Migration Assistant

This topic is intended for AmigoPOS 7 users that wish to migrate an existing MS Jet database to SQL Server Express prior to installing AmigoPOS 8. This step is not required when starting with a [new database](#)<sup>[606]</sup>. In addition, you may upload a compressed backup of your current database using a support ticket and we will migrate it and return the SQL Server database backup to you. This should be done when the business is closed to allow enough time for the migration. The SQL Server database backup can then quickly be restored as shown [here](#)<sup>[629]</sup>.

The **MS SQL Server Migration Assistant (SSMA)** is a free utility that will automatically convert your exiting AmigoPOS MS Jet database to a MS SQL Server database. Do not use the import utility provided with SQL Server Management Studio. The Migration Assistant is the only utility that can successfully import the existing database relationships and column keys required by AmigoPOS.

Create an uncompressed (not zipped) backup of the current MS Jet database and save it to the desktop for later use.

Download and install the **Microsoft SQL Server Migration Assistant for Access** [here](#). The most recent version at the time of this writing is v6.0.



Language: English Download

Microsoft SQL Server Migration Assistant (SSMA) for Access is a tool to automate migration from Microsoft Access database(s) to SQL Server and Azure SQL DB.

- + Details
- + System Requirements
- + Install Instructions

#### SQL Server Migration Assistant at the Microsoft Download Center

#### Microsoft Access Runtime 2010 32-Bit

The MS Access Runtime provider is required and can be downloaded free from the Microsoft Download Center [here](#) (or available as part of Microsoft Office). **Install the 32-Bit version**, even on 64-Bit computers.

Quick details

Version: 1

Date published: 5/10/2010

Change language: English

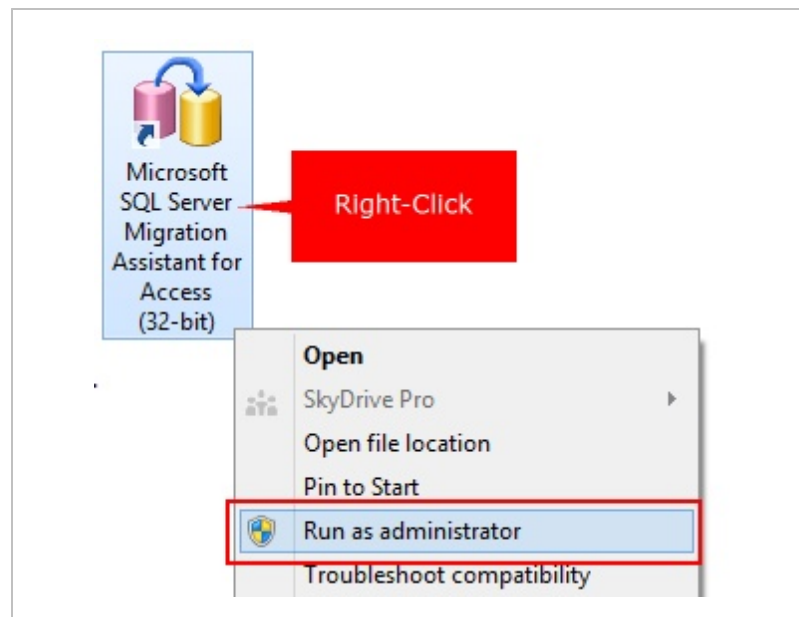
Files in this download

The links in this section correspond to files available for this download. Download the files appropriate for you.

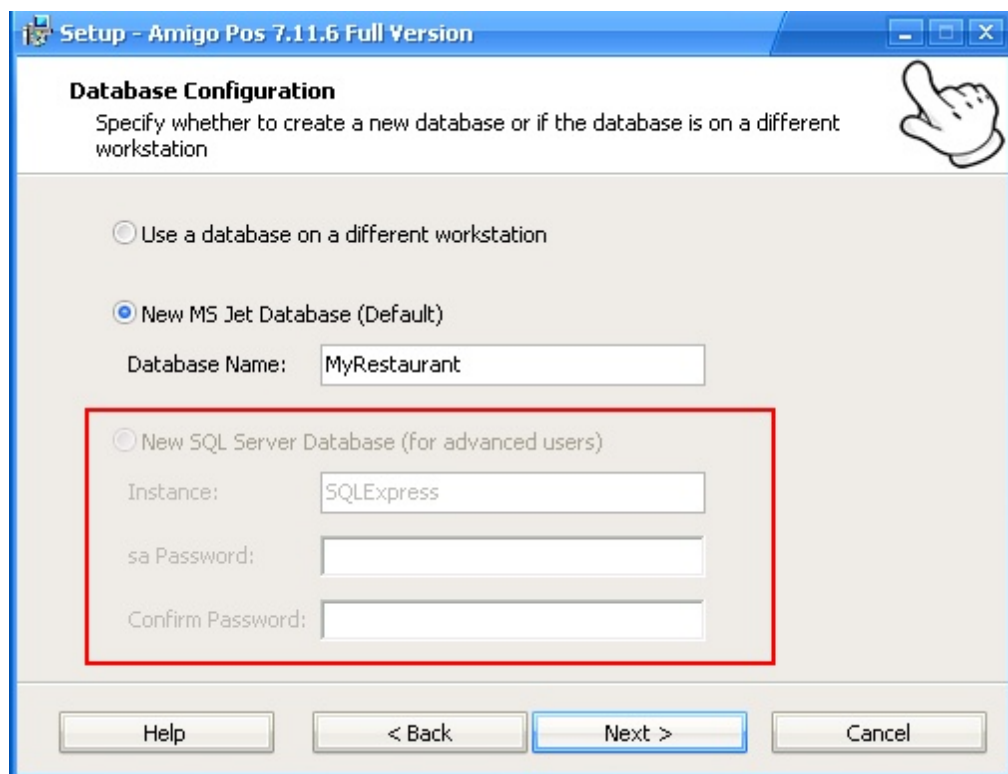
File name	Size	
AccessRuntime.exe	175.5 MB	<span style="border: 2px solid red; padding: 5px;">Download</span>
AccessRuntime_X64.exe	212.4 MB	<span style="border: 1px solid #ccc; padding: 5px;">Download</span>

#### Microsoft Access 2010 Runtime at the Microsoft Download Center

**Windows 8/7/Vista 64-bit:** The installer will create 2 shortcuts named Microsoft SQL Server Migration Assistant for Access (32-bit) and Microsoft SQL Server Migration Assistant for Access. Use **Microsoft SQL Server Migration Assistant for Access (32-bit)**, even on 64-bit computers.



The migration assistant does not have to be installed on the same workstation as the database server. Most often it will be used only once and can be uninstalled. Use the following images as a guide to converting the **AmigoPOS MS Jet database to a SQL Server database**.



Migration Wizard Start Screen

Run Microsoft SQL Server Migration Assistant for Access from Windows Start > All Programs > **Microsoft SQL Server Migration Assistant for Access (32-bit)**.

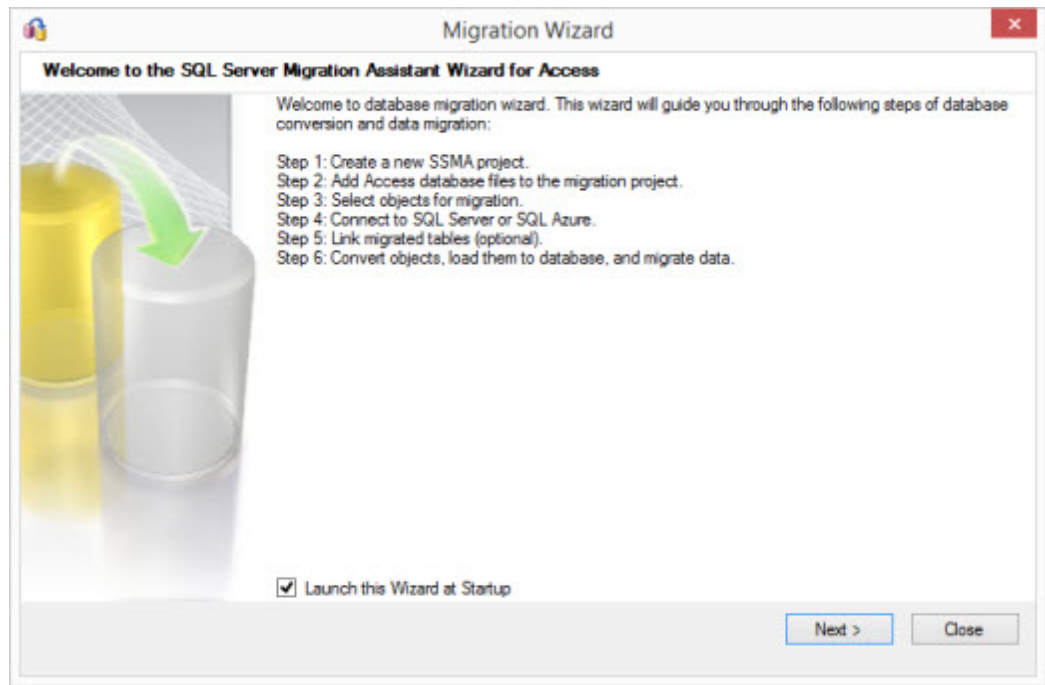
If using a release **prior to version 6.0**, the following screen will appear the first time the utility is run. Click the link to submit a brief survey to receive the license file. The license file should be downloaded to the directory shown in the box. Click the Refresh License button and then the Close button after the confirmation message appears.

#### Database Configuration

Specify whether to create a new database or if the database is on a different workstation

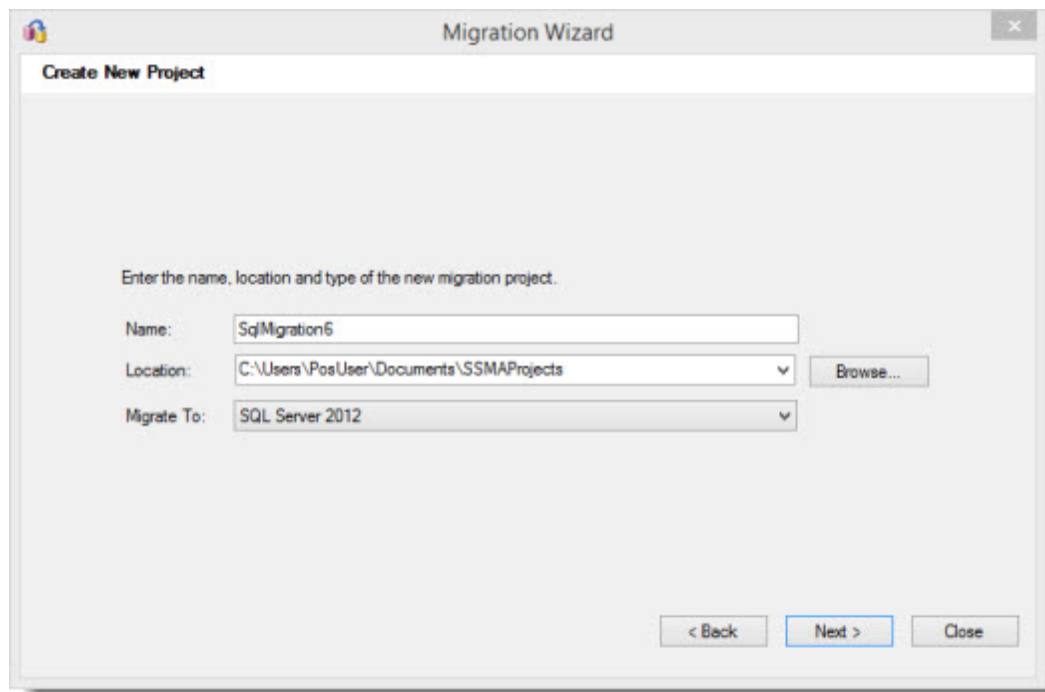
- ☒ Use a database on a different workstation  
☐ Install SQL Native Client

The welcome screen appears with a summary of the steps required for successful conversion. Click **Next**.



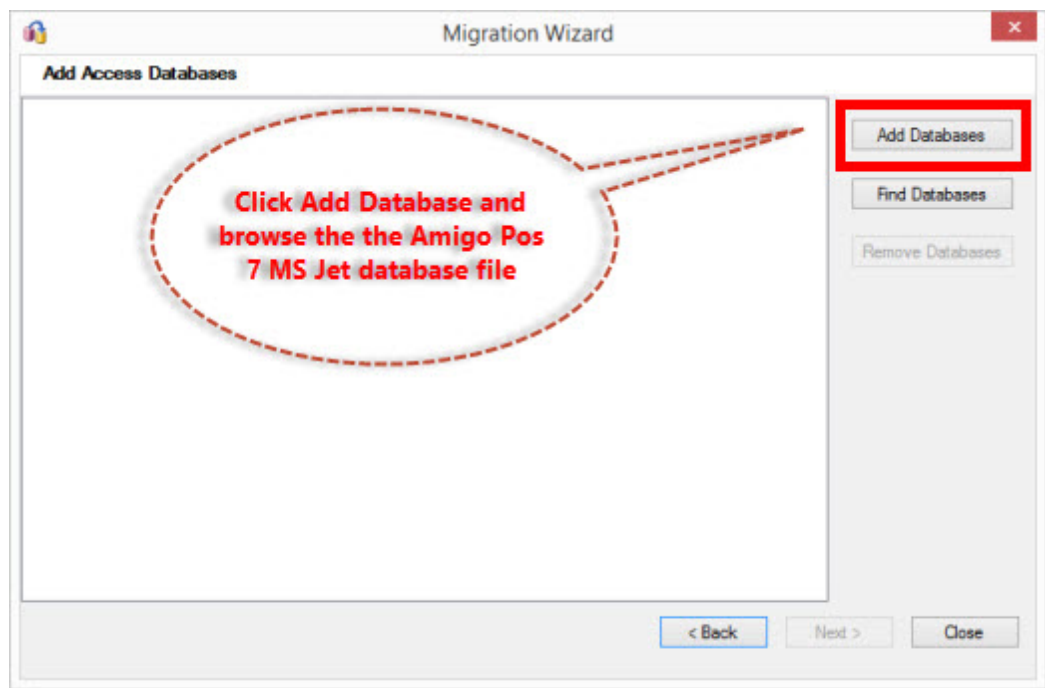
**Migration Wizard Start Screen**

Change the project name and location if required. This project will appear under File - Recent Projects if you need to access it later. Click Next.



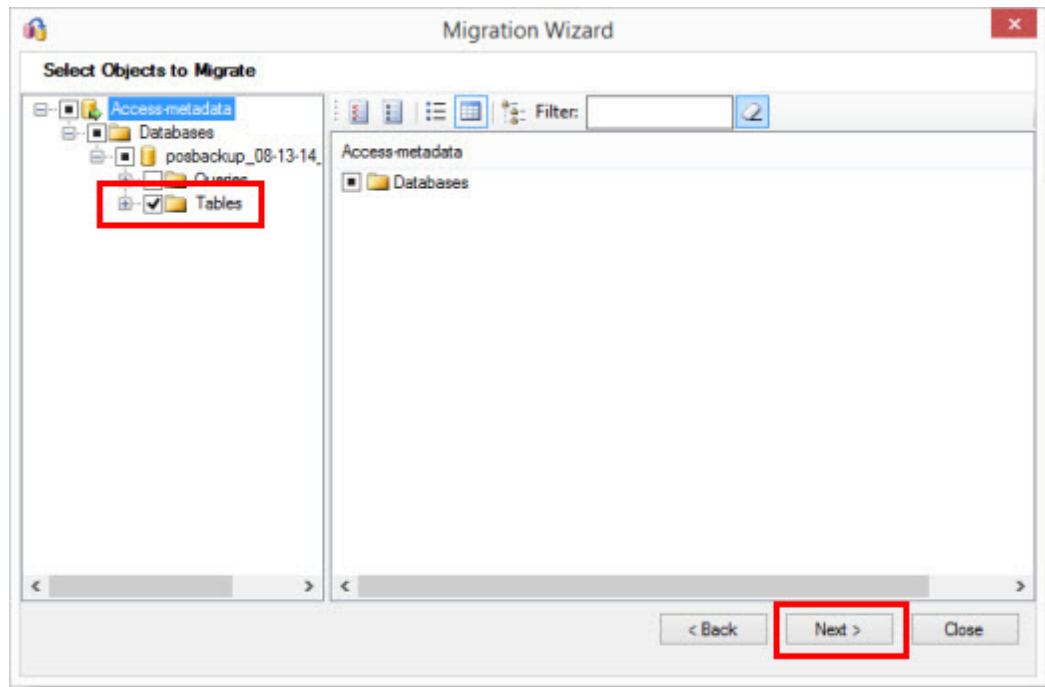
**Create a new project**

Click Add Databases and select the AmigoPOS MS Jet database (the database backup should be located on the desktop as described earlier). If you did not create a database backup and are unsure of the location, open the Database Configuration Utility and use the file shown in the Path box. Click Next.



**Select the current Amigo Pos (MS Jet) database**

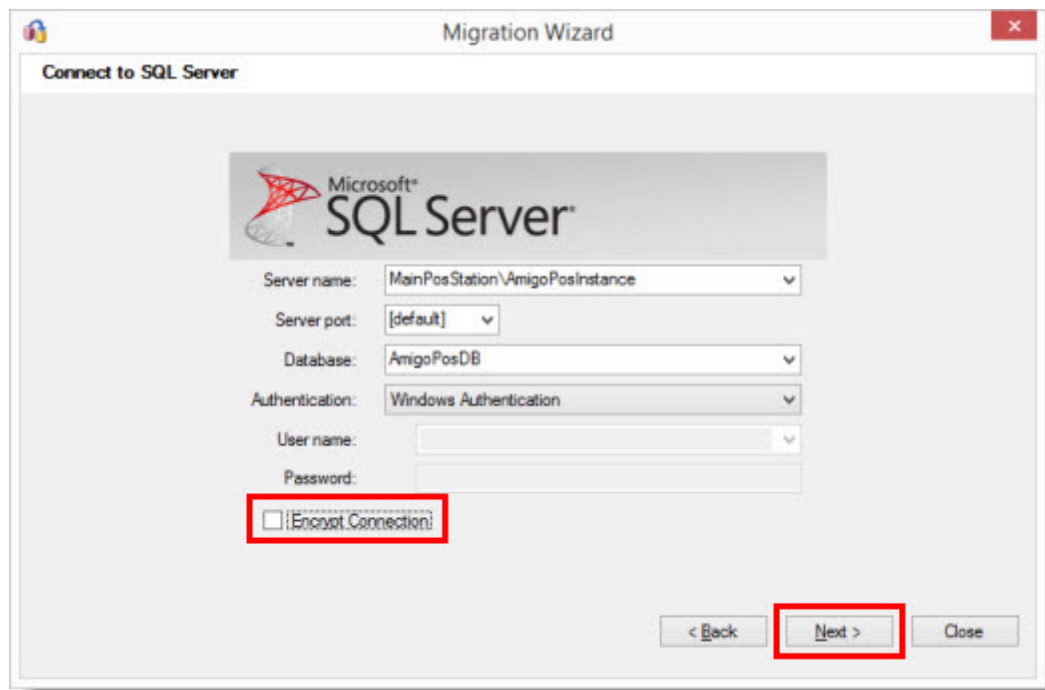
Wait 30 seconds for the database to load and expand the tree and check the box next to the database. Only Tables should be checked, as the queries are not used by SQL Server Express. Click Next.



#### Select the Database Objects

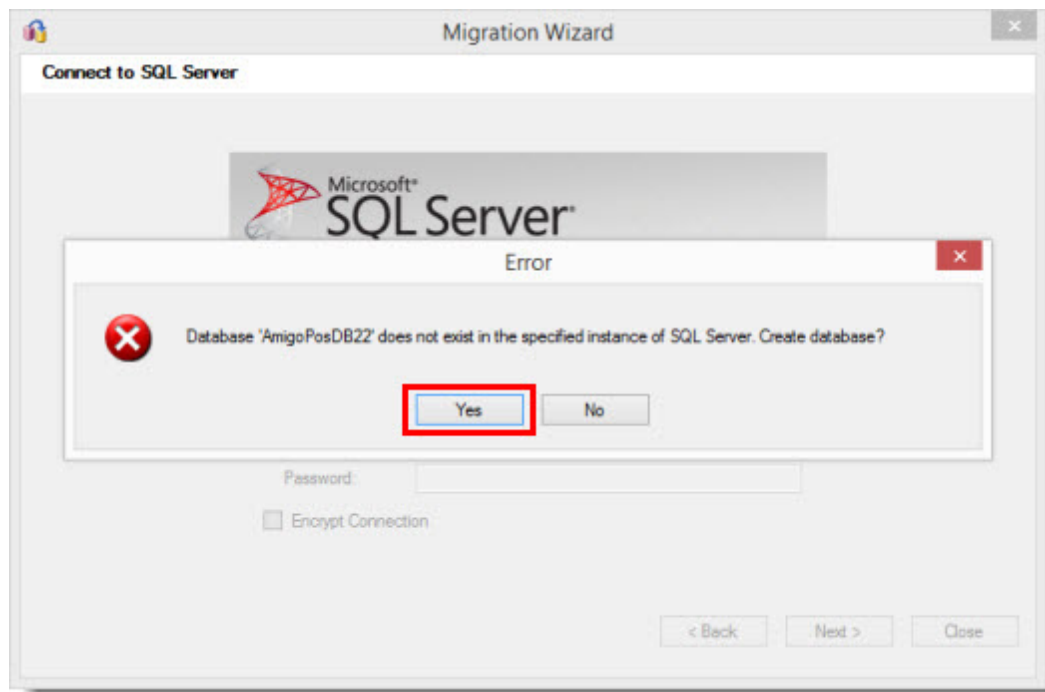
Connect to the SQL Server using the parameters configured in the previous topic. Enter a name for the database that has not been used before. Do not select an existing database from the list. Un-check the box next to Encrypt Connection and click Next.



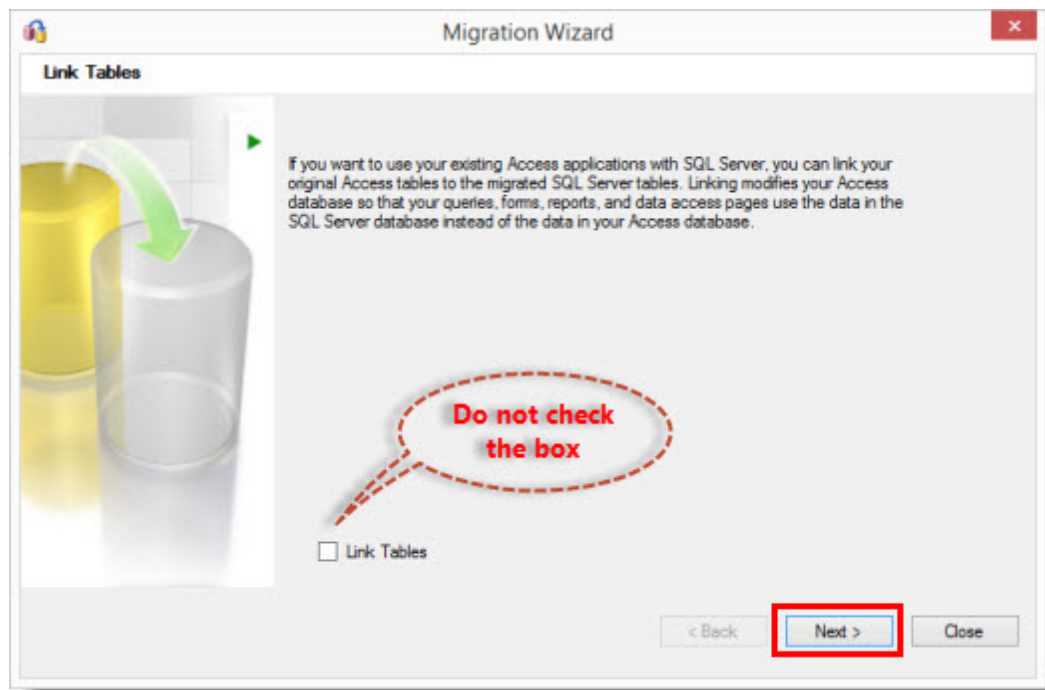


#### SQL Server Login

The database does not exist and you will be prompted to create it. Click Yes at the prompt. If this screen does not appear, the database already exists. Start over and enter a unique database name.



Ensure that the Link Tables box is not checked. Click Next.

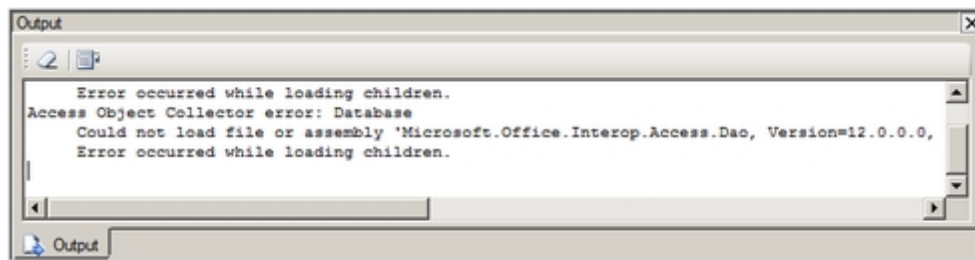


**Do not enable the Link Tables option**

If the following error appears in the output window at the bottom of the migration screen, the prerequisite [MS Access Runtime](#) <sup>[615]</sup> is not installed and the migration cannot continue. This error will also occur if the 32-bit MS Access Runtime is installed and the 64-bit Migration assistant is used:

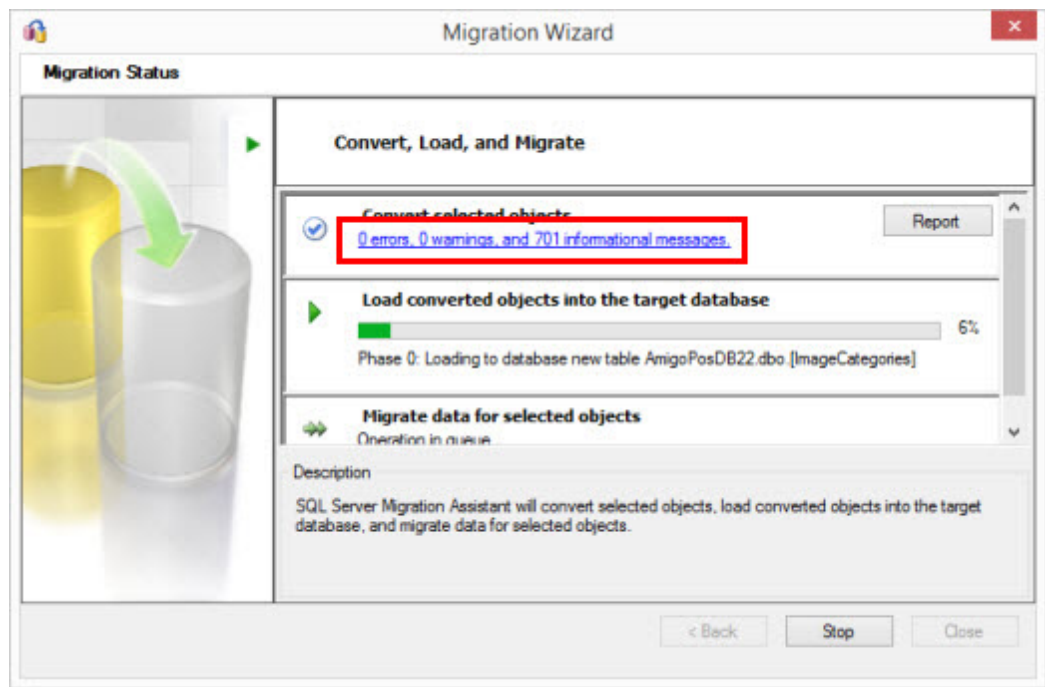
**Access Object Collector error: Database**

*Could not load file or assembly 'Microsoft.Office.Interop.Access.Dao, Version=12.0.0.0, Culture=neutral, PublicKeyToken=71e9bce111e9429c' or one of its dependencies. The system cannot find the file specified.  
Error occurred while loading children.*



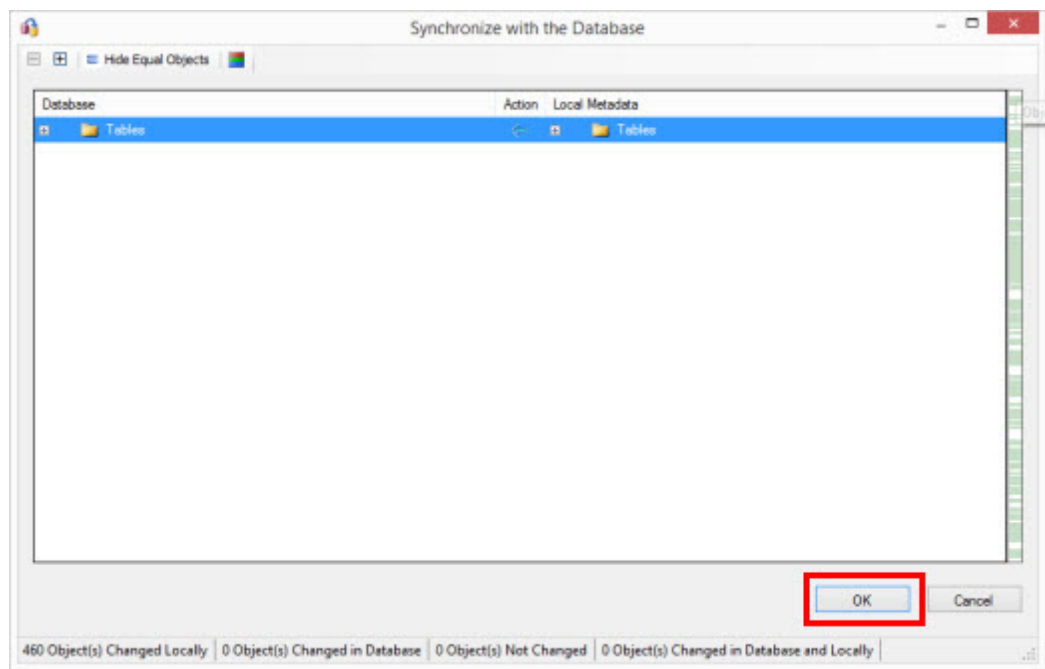
**Missing MS Access Runtime Error**

The migration utility will load all of the table names from the MS Jet database.



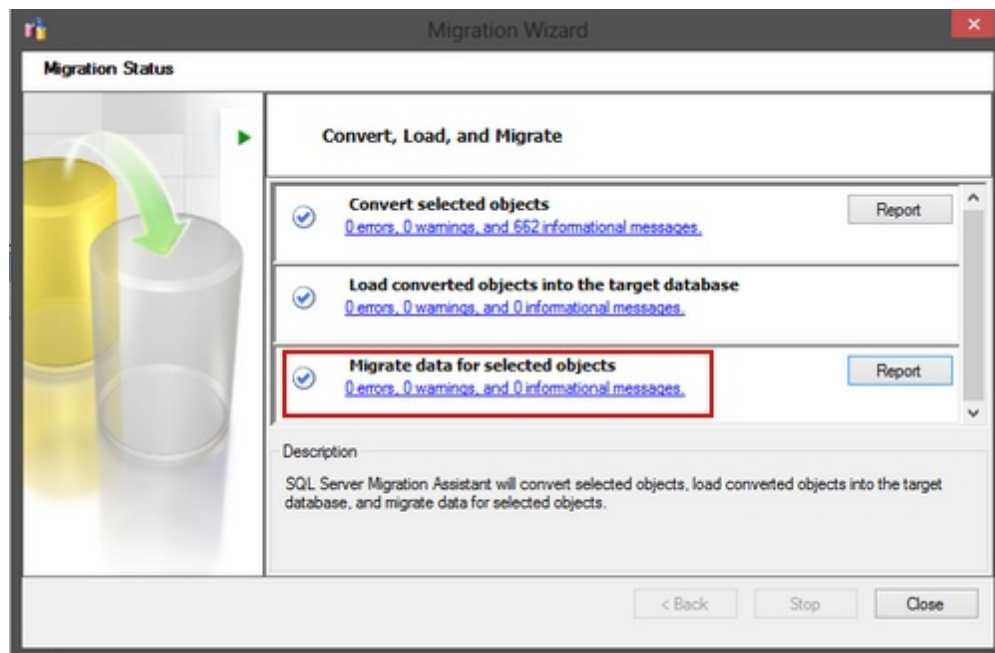
**Convert Selected Objects Completed With 0 Errors**

Click OK to confirm. The migration will take a few minutes to complete. Do not interrupt the process.



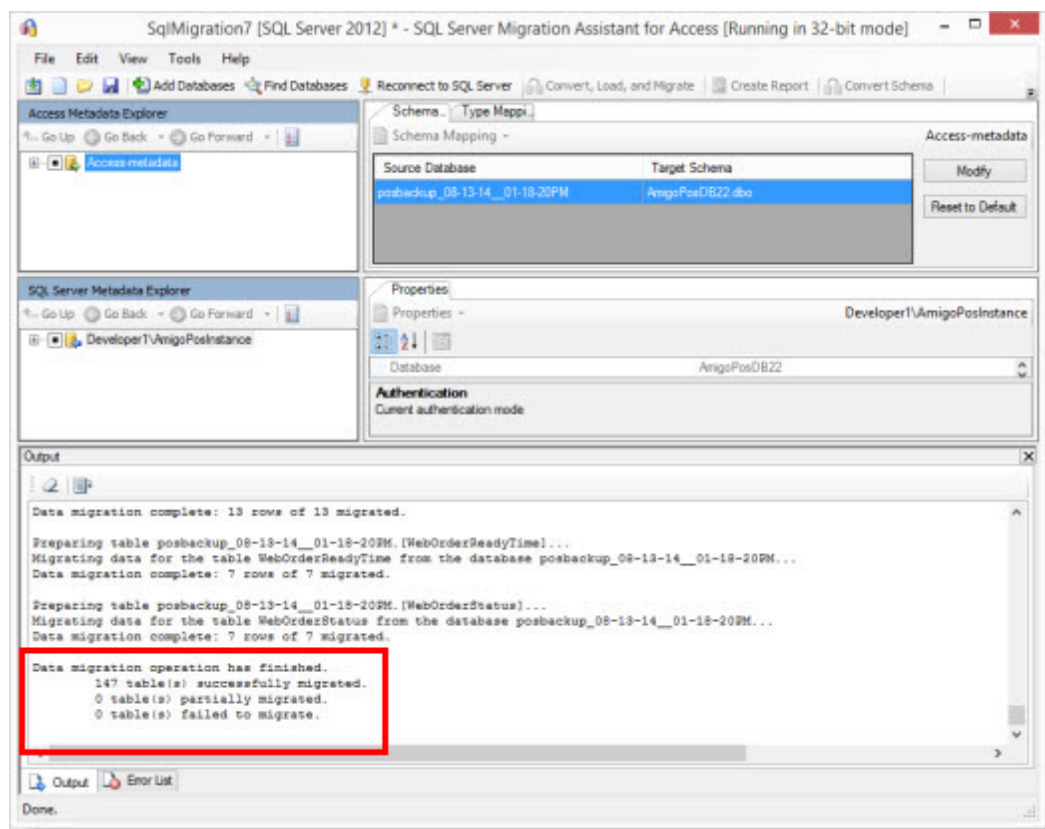
**Confirmation Window**

If any errors exist, click **Report** to send this information to technical support (warnings are normal and are not cause for concern). Click **Close** to exit the Migration Wizard.



Migration Wizard Finish Screen

The output and error list windows also contain any error messages. Click Copy to paste the messages into a support ticket. Close the MS SQL Server Migration Assistant. Open **Back Office > Settings > Database Settings** and enter the connection settings for the new database as described [here](#)<sup>[625]</sup>.



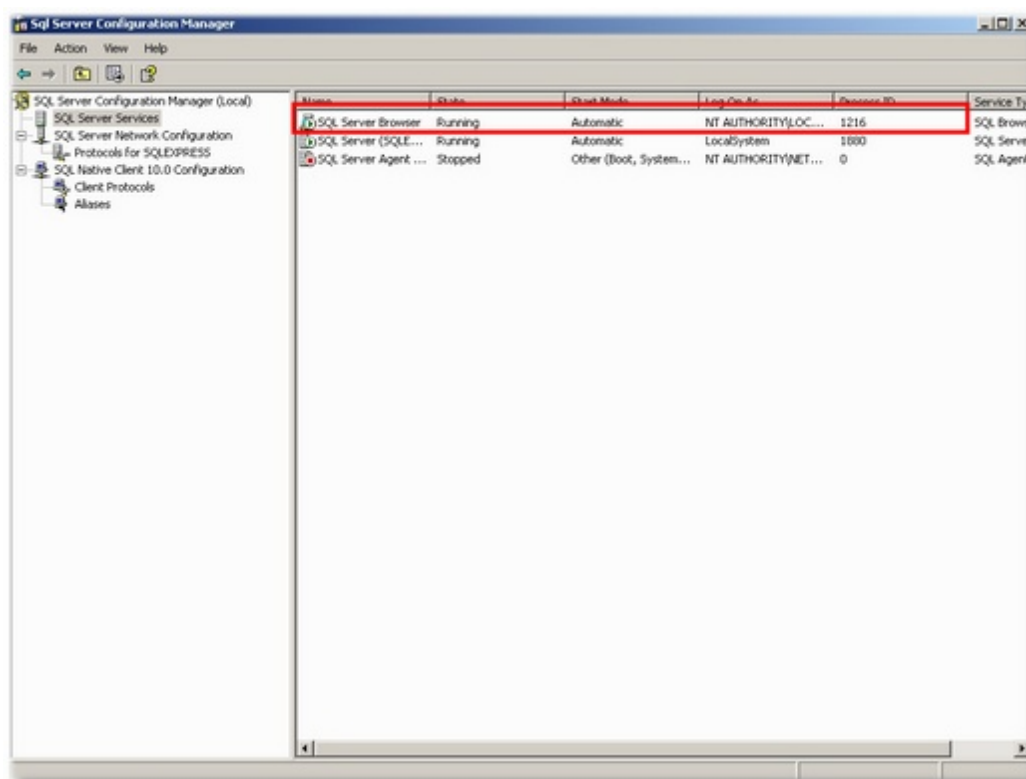
Review the output window for errors

### 13.9.5 Configure SQL Server

After installation is complete and the database is created, SQL Server must be configured to enable network communication. AmigoPOS can use either the TCP/IP or Named Pipes protocol for SQL Server connections. The default protocol for AmigoPOS 8.64 and later is TCP/IP.

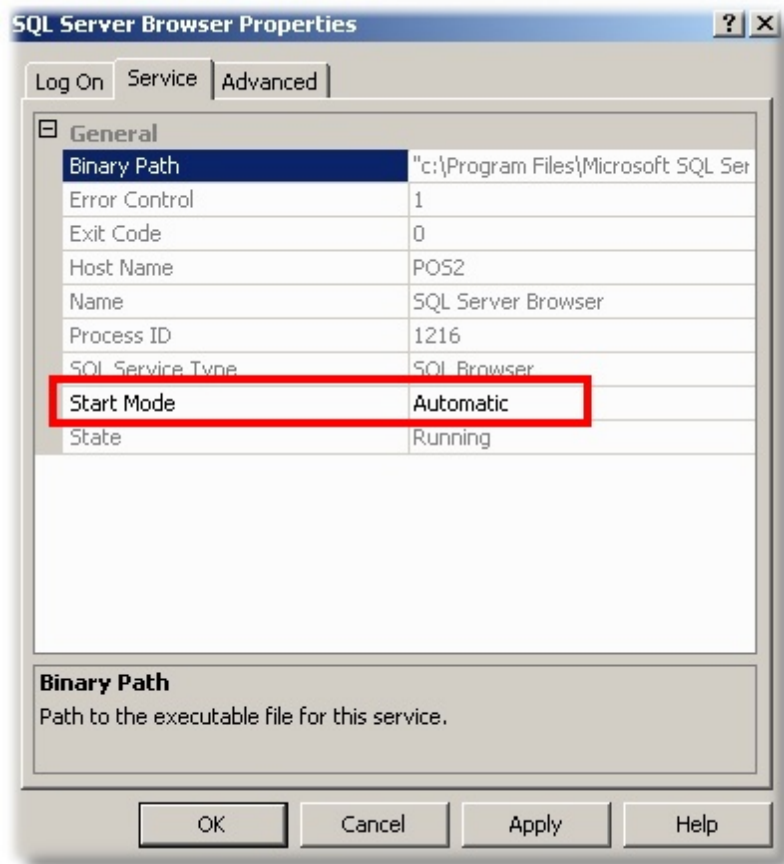
When SQL Server is running on a different computer than AmigoPOS, configure the Firewall to allow SQL Server to communicate over the network. Click [here](#) for instructions on unblocking the Windows Firewall. This procedure must be performed on the computer running SQL Server.

Run **SQL Server Configuration Manager** from Start - Microsoft SQL Server 2008 - Configuration Tools. Select **SQL Server Services** on the left side of the screen.



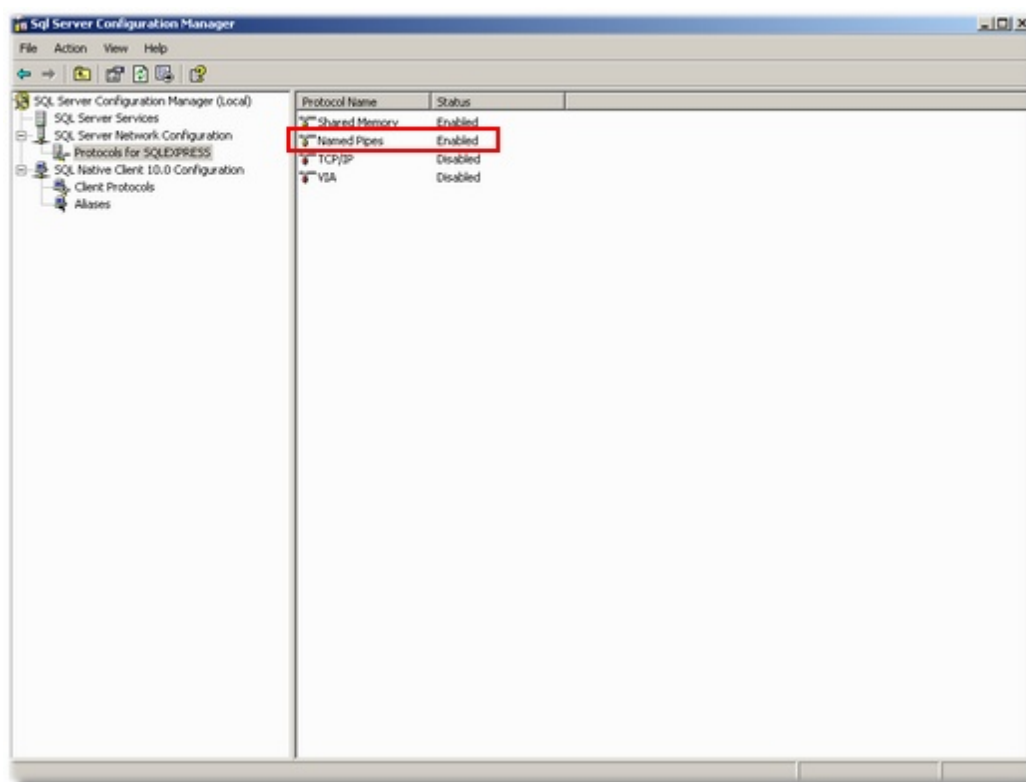
**SQL Server Configuration Manager**

Double-click on **SQL Server Browser**, click the **Service** tab in the properties window and set the start mode to Automatic. Click **OK**.



SQL Server Browser Properties

Select **SQL Server Network Configuration - Protocols for SQLEXPRESS**, and double-click on **Named Pipes**. Set Enabled to **Yes** and click **OK**.



#### Network Protocols

SQL Server must be restarted after the configuration changes are made.

### 13.9.6 Firewall Configuration

\*This help topic is taken from Microsoft Support link <http://support.microsoft.com/kb/968872#LetMeFixItMyselfAlways>

Windows Firewall on Windows Server 2008 helps prevent unauthorized access to computer resources. However, if the firewall is configured incorrectly, attempts to connect to an instance of SQL Server may be blocked. To access an instance of SQL Server that is behind the firewall, you must configure the firewall on the computer that is running SQL Server.

This topic helps you open the firewall ports for SQL Server on Windows Server 2008. The script that is discussed in this section opens the firewall ports for SQL Server.

To create the script, follow these steps:

1. Start Notepad.
2. Copy and paste the following code into Notepad:

```
@echo ===== SQL Server Ports =====
@echo Enabling SQLServer default instance port 1433
netsh firewall set portopening TCP 1433 "SQLServer"
@echo Enabling Dedicated Admin Connection port 1434
netsh firewall set portopening TCP 1434 "SQL Admin Connection"
@echo Enabling conventional SQL Server Service Broker port 4022
netsh firewall set portopening TCP 4022 "SQL Service Broker"
@echo Enabling Transact-SQL Debugger/RPC port 135
netsh firewall set portopening TCP 135 "SQL Debugger/RPC"
```

```

@echo ===== Analysis Services Ports =====
@echo Enabling SSAS Default Instance port 2383
netsh firewall set portopening TCP 2383 "Analysis Services"
@echo Enabling SQL Server Browser Service port 2382
netsh firewall set portopening TCP 2382 "SQL Browser"
@echo ===== Misc Applications =====
@echo Enabling HTTP port 80
netsh firewall set portopening TCP 80 "HTTP"
@echo Enabling SSL port 443
netsh firewall set portopening TCP 443 "SSL"
@echo Enabling port for SQL Server Browser Service's 'Browse' Button
netsh firewall set portopening UDP 1434 "SQL Browser"
@echo Allowing multicast broadcast response on UDP (Browser Service Enumerations OK)
netsh firewall set multicastbroadcastresponse ENABLE

```

3. Save the file as a .txt file by using the following name: OpenSqlServerPort.txt
4. Rename the OpenSqlServerPort.txt file to the following: OpenSqlServerPort.bat

Before you run the OpenSqlServerPort.bat script, you must copy the script to the computer which has the firewall and then run the script on that computer. To run the script, follow these steps:

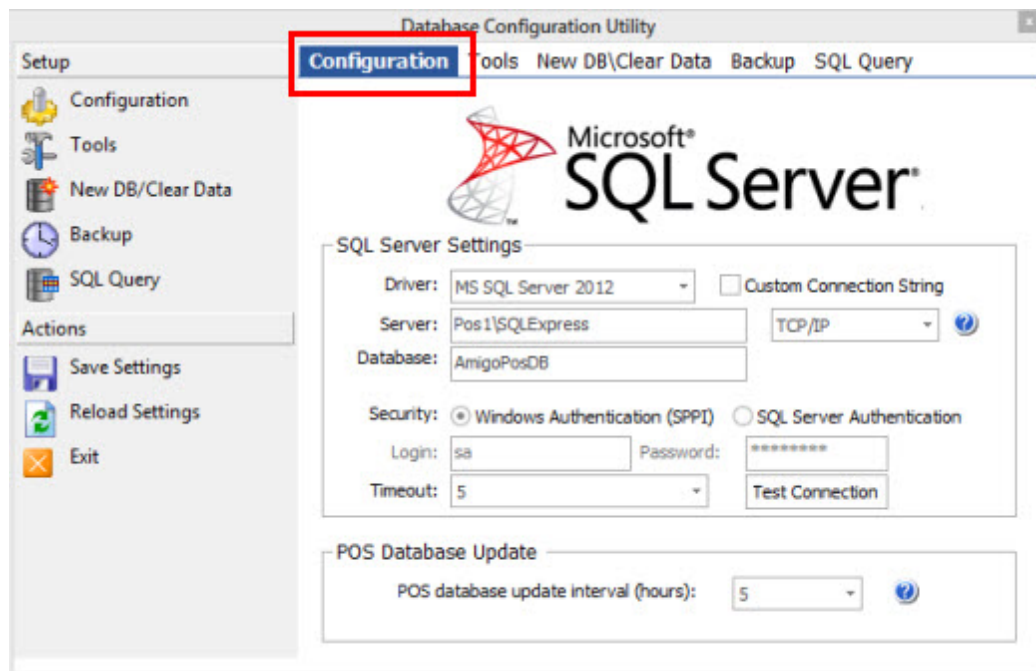
1. Click Start, click Run, type cmd, and then click OK.
2. At the command prompt, use the cd command to navigate to the folder in which you saved the OpenSqlServerPort.bat file.
3. To run the OpenSqlServerPort.bat script, type OpenSqlServerPort.bat at the command prompt, and then press ENTER.

Check whether the problem is fixed by trying to access the instance of SQL Server from another computer.

### 13.9.7 Configure Amigo Pos

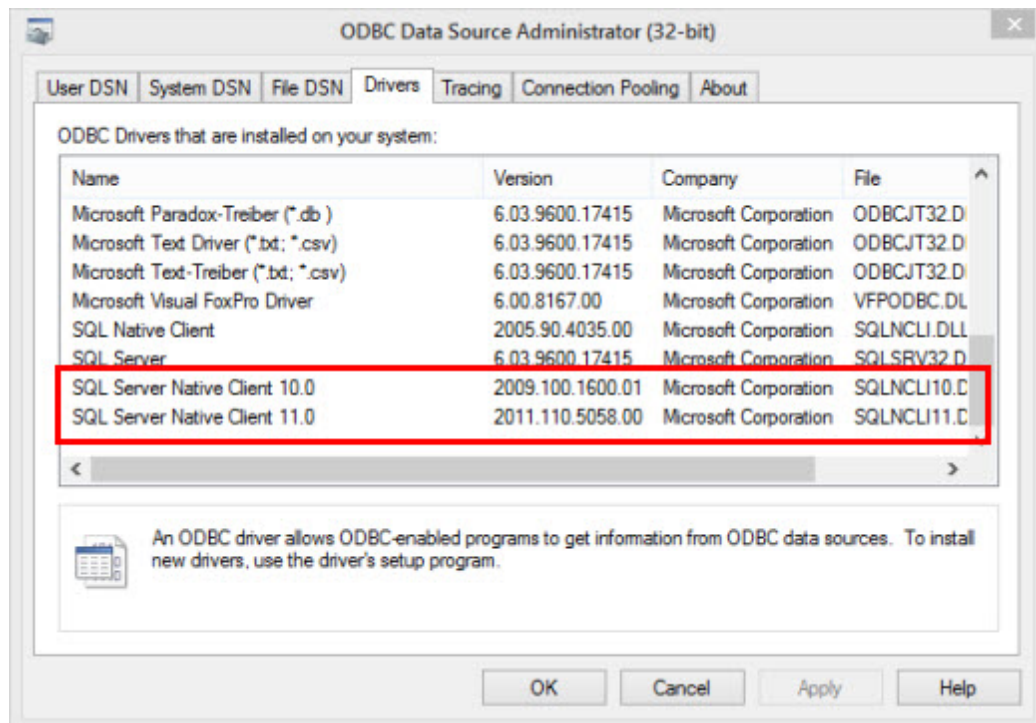
Complete the following steps to configure AmigoPOS to use MS SQL Server as the database engine. Do not complete this section until MS SQL Server has been [installed](#)<sup>[598]</sup> (and [configured](#)<sup>[622]</sup> successfully) and the database is [created](#)<sup>[612]</sup>.





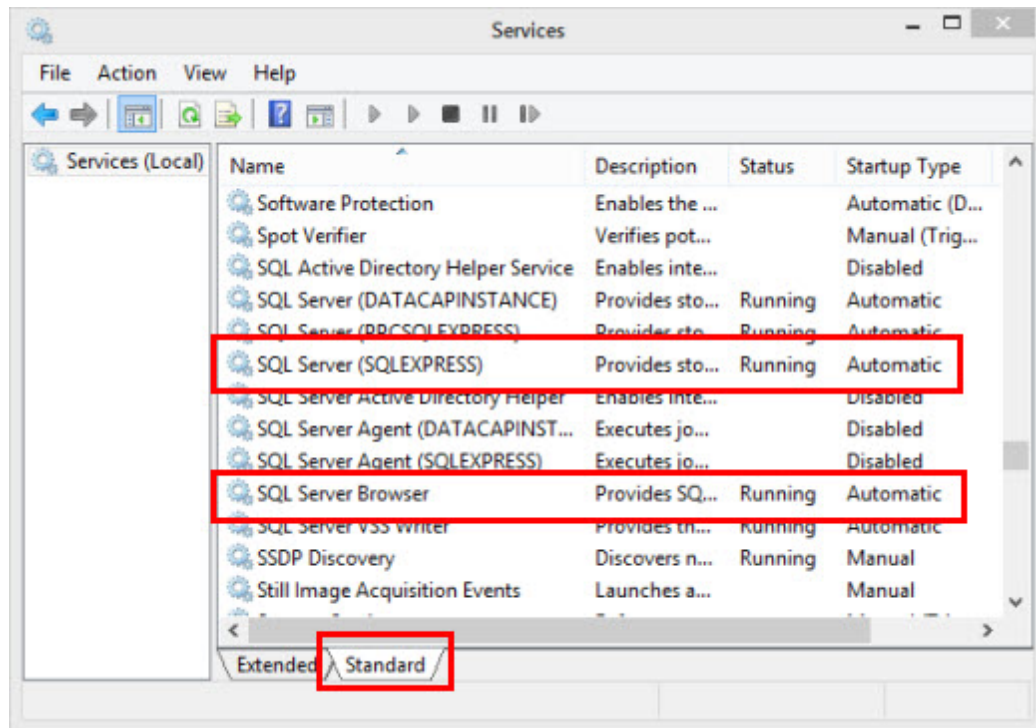
Database Configuration Utility

1. Open the database configuration utility from the Windows Start Menu and select **Microsoft SQL Server** from the drop-down list. Select the version of SQL Server database driver to use, as shown in box #2 above. If you are unsure, open Control Panel - Administrative Tools - Data Sources and refer to the following image. SQL Native Client 11.0 is used by MS SQL Server 2012, SQL Server Native Client 10.0 is used by MS SQL Server 2008 R2. Note that AmigoPOS installs SQL Server Native Client 11.0 by default on Windows 7/8/8.1/10 computers.



Control Panel &gt; Administrative Tools &gt; ODBC Data Sources

2. Enter the Database Server name and Instance, separated by a back slash as shown above in box #4. The server name is the name of the PC as shown in the Windows Control Panel System applet. In this case the PC is named **POS1**. The instance name is set during SQL Server installation and can be determined by opening the Services applet in Windows Control Panel | Administrative Tools, as shown below. In this case, there are 3 instances installed. The instance used by AmigoPOS is **SQLEXPRESS**. The server name is **POS1\SQLEXPRESS**, as shown above in the "Server" field.

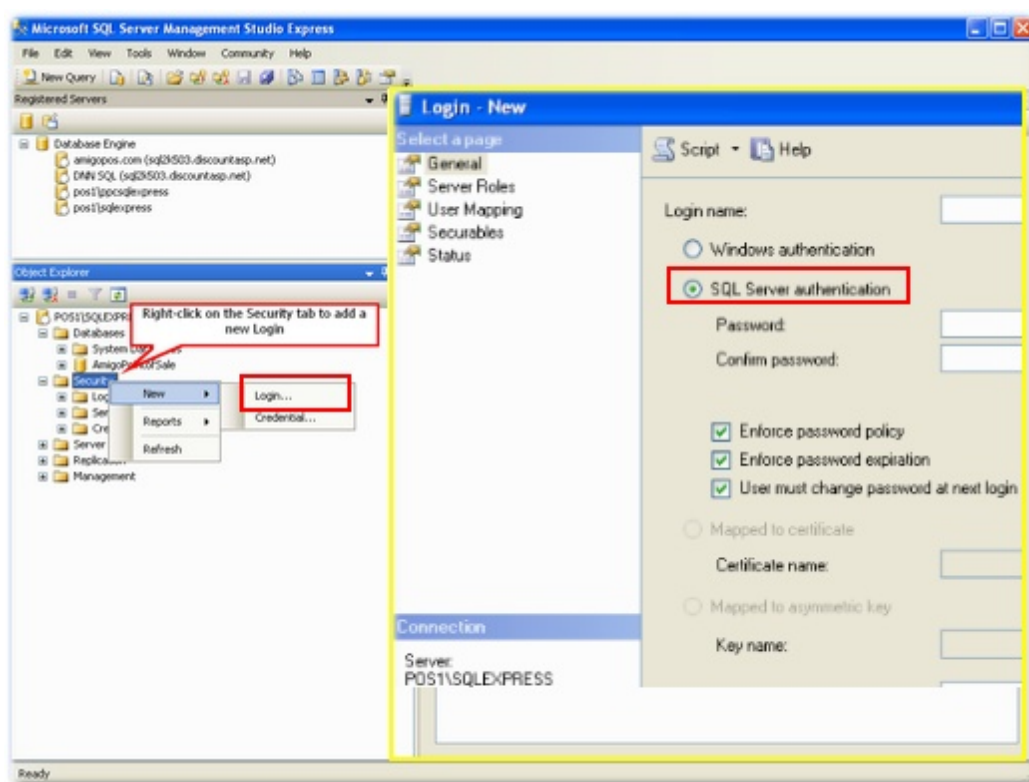


**Windows Services Applet**

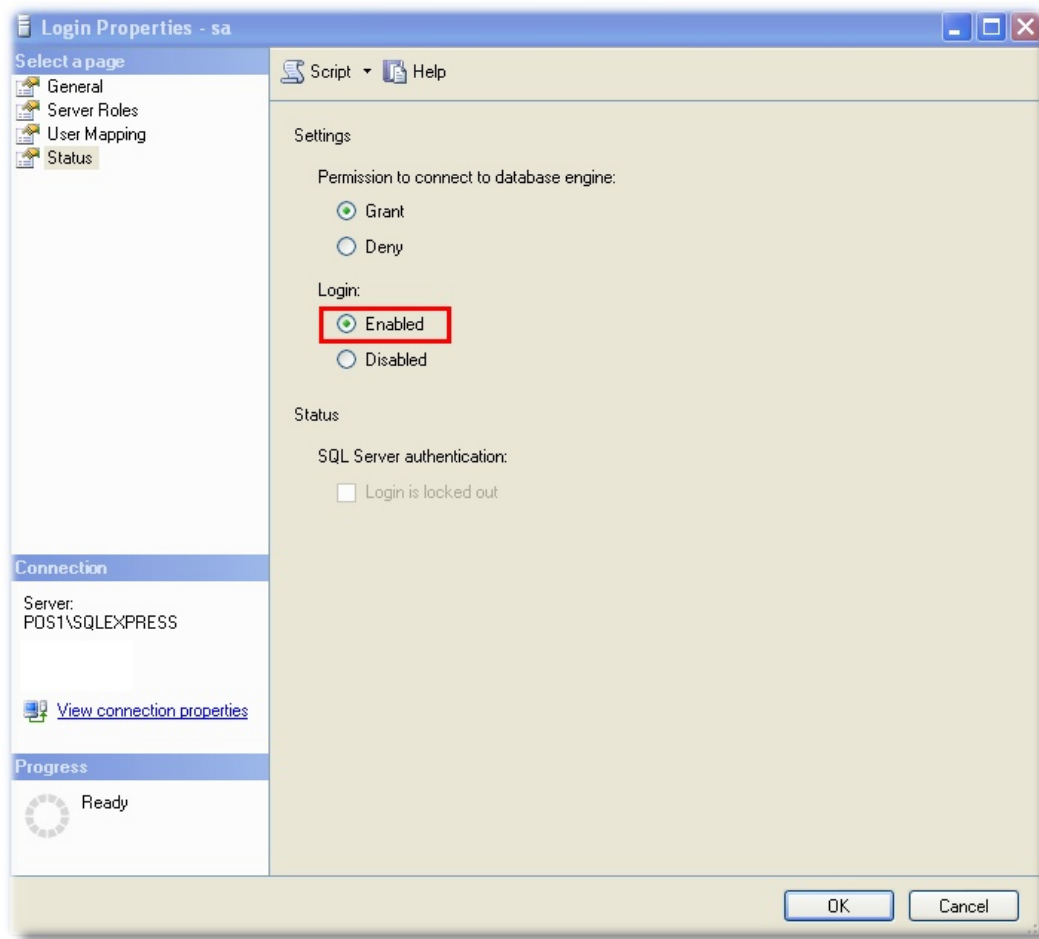
3. Enter the database name as described in the [previous topic](#)<sup>[612]</sup>. In the case, the database is named AmigoPOS as shown above in the "Server" field.

4. Select the mode of security. If multiple POS Stations (and/or back office computers) exist on a simple Windows network, use SQL Server Authentication, as it is the easiest to configure. If SQL Server resides on the same PC that is being configured or a domain is used, Windows Authentication can be used with little or no additional configuration.

5. Enter the **Login Name**. The default Login created during setup is **sa** but may be disabled. For extra security leave this account disabled and create a new Login. The sa account can be enabled or additional Logins can be added by using **SQL Server Management Studio Express**, as shown below. Use SQL Server Authentication when creating a new login



**Adding a new SQL Server Login in SQL Server Management Studio**



**Enable the sa account in SQL Server Management Studio**

6. Enter the **Password** that was created during installation or when adding new users in the previous step.

7. Select the **Timeout** value. This is the time in seconds that AmigoPOS will attempt to connect to the database server before raising an error. A low value may cause excessive errors on slow networks; a high value will result in excessive wait time before the error is raised; AmigoPOS will be unresponsive to mouse clicks during this timeout period. In most cases, a value between 5-15 seconds is adequate.

8. Click **Test** to confirm that the connection parameters are correct. If the connection is not established within the Timeout interval specified in the previous step, an error message will appear below the Test button. The error message is also saved to the error log and can help the technical support personnel resolve the issue.

**Note that any changes in the SQL Server connection settings are saved automatically when the Test button is pressed.**

### 13.9.8 Backup and Restore

Backing up the database at regular intervals is vital to minimize recovery time in the event of hardware failure or other catastrophic event. Although MS SQL Server Standard and Enterprise Editions provide an automatic backup mechanism through the SQL Agent Service, MS SQL Server Express 2005 users must either manually backup the database, create a backup script and add a new task to Windows Task Scheduler, or use a 3rd party backup application (recommended) as described below.

Select the topic to continue:

- [Backup the database](#) <sup>630</sup>
- [Restore an existing backup](#) <sup>633</sup>

## Backup

- **Method 1: 3rd Party Application** (recommended)

A very easy to use and reliable method is a free application named **SQLBackupAndFTP**. SQLBackupAndFTP is SQL Server backup software that runs scheduled backups of *SQL Server* or *SQL Server Express* databases, zips the backups, stores them on a network or on a FTP server, removes old backups, and sends an e-mail confirmation on job's success or failure. SQL Backup and FTP must be installed on the PC running SQL Server. Download [here](#).



**Recommended! [SQL Backup and FTP](#) is freeware and used in-house by AmigoPOS technical support staff**

- **Method 2: Scheduled Task** (for advanced users)

1. Advanced users may create a SQL script by opening a new query editor window SQL Server Management Studio Express and saving it as a file. This script contains commands to backup the database, similar to:

```
--AmigoPOSBackup.sql

DECLARE @Path NVARCHAR(1000), @FileName NVARCHAR(255), @FullPath NVARCHAR(1255)
SET @Path = '\\POS1\E$\SQLServer\2008\Backups\'
SET @FileName = 'AmigoPointOfSale_' + REPLACE(CONVERT(VARCHAR(10), GETDATE(), 101),
'/','') + '.bak'
SET @FullPath = @Path + @FileName

BACKUP DATABASE AmigoPointOfSale
TO DISK = @FullPath
WITH INIT
```

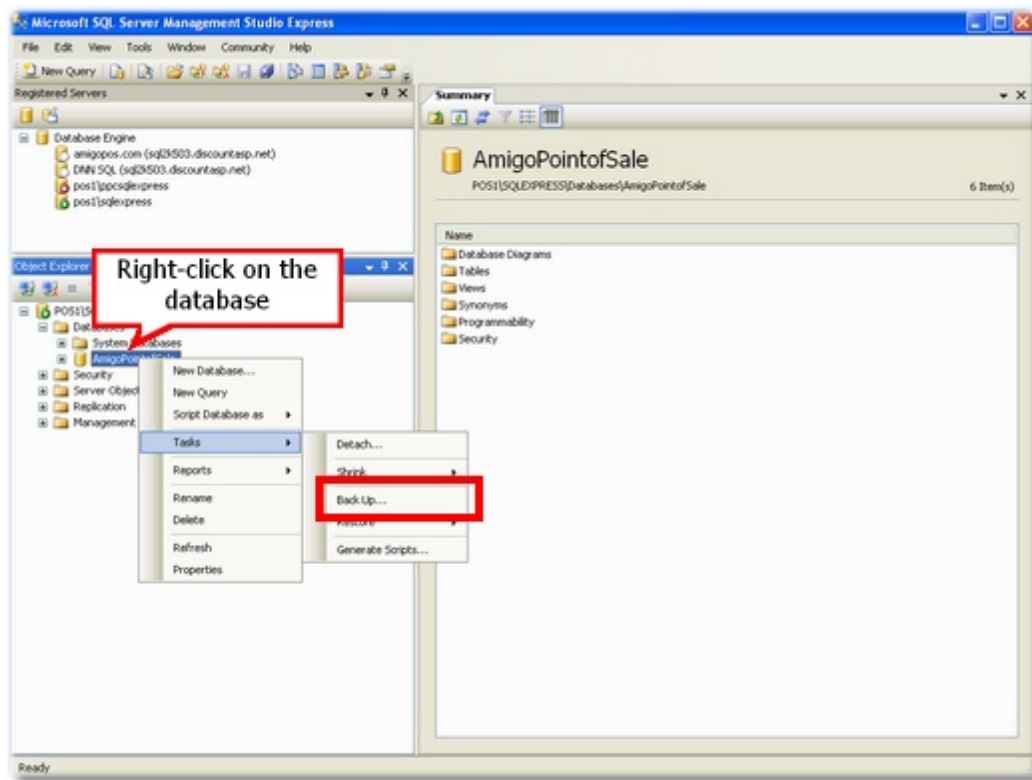
2. Then create a batch file to run the script as shown below:

```
sqlcmd -S POS2\SQL2008 -u -i E:\SQLEXPRESSBackup\AmigoPOSBackup.sql
```

3. Finally, create a scheduled task to run the batch file in the Accessories - System Tools folder in your Start Menu

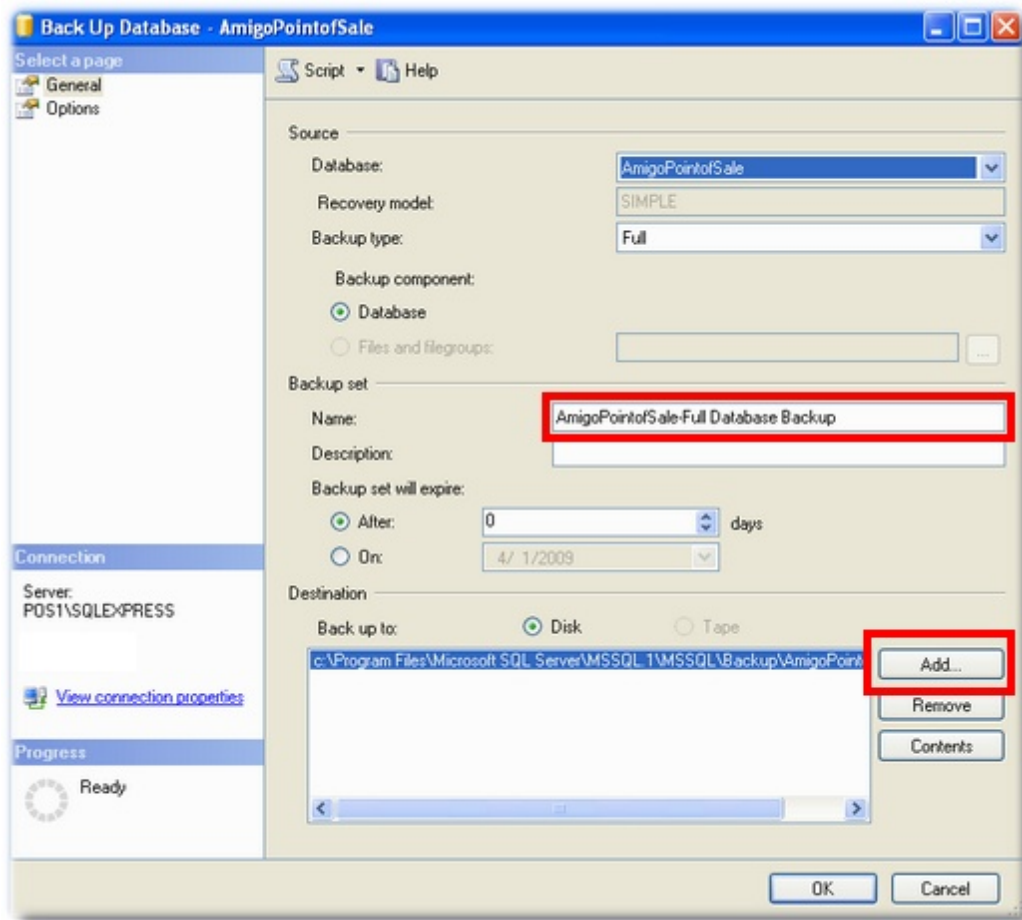
- **Method 3: Manual Backup**

To manually backup the database, open SQL Server Management Studio Express, connect to the server, right-click on the database and select **Tasks - Back Up...** as shown below.



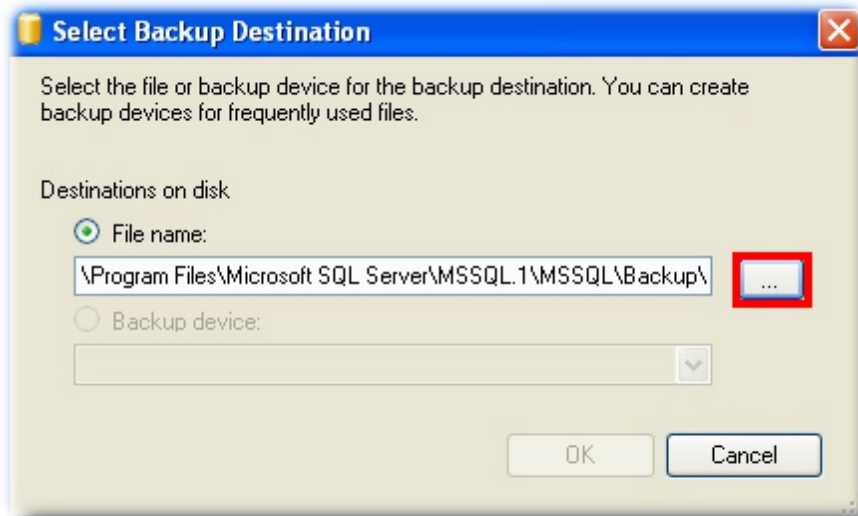
SQL Server Management Studio

Enter a user-friendly name for the backup. You may also wish to set an expiration date for the backup file if backups are routinely created.



SQL Server Backup

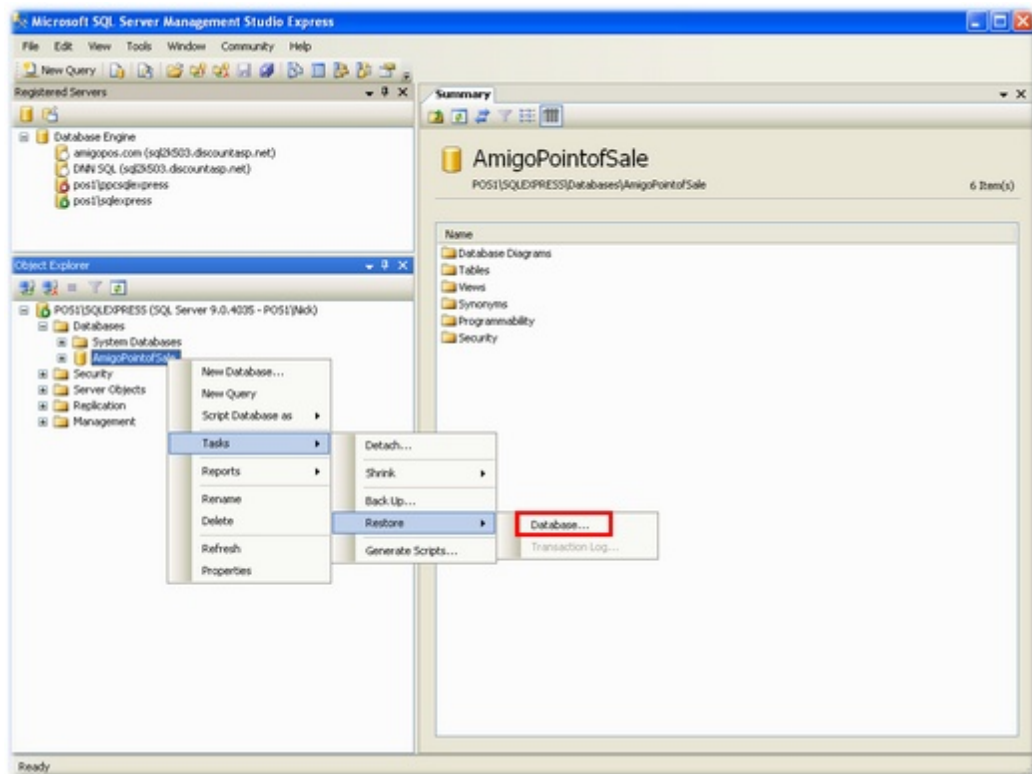
Click **Add...** to browse for a destination. You may wish to use an external device for added protection.



Selecting the Backup Destination

## Restore

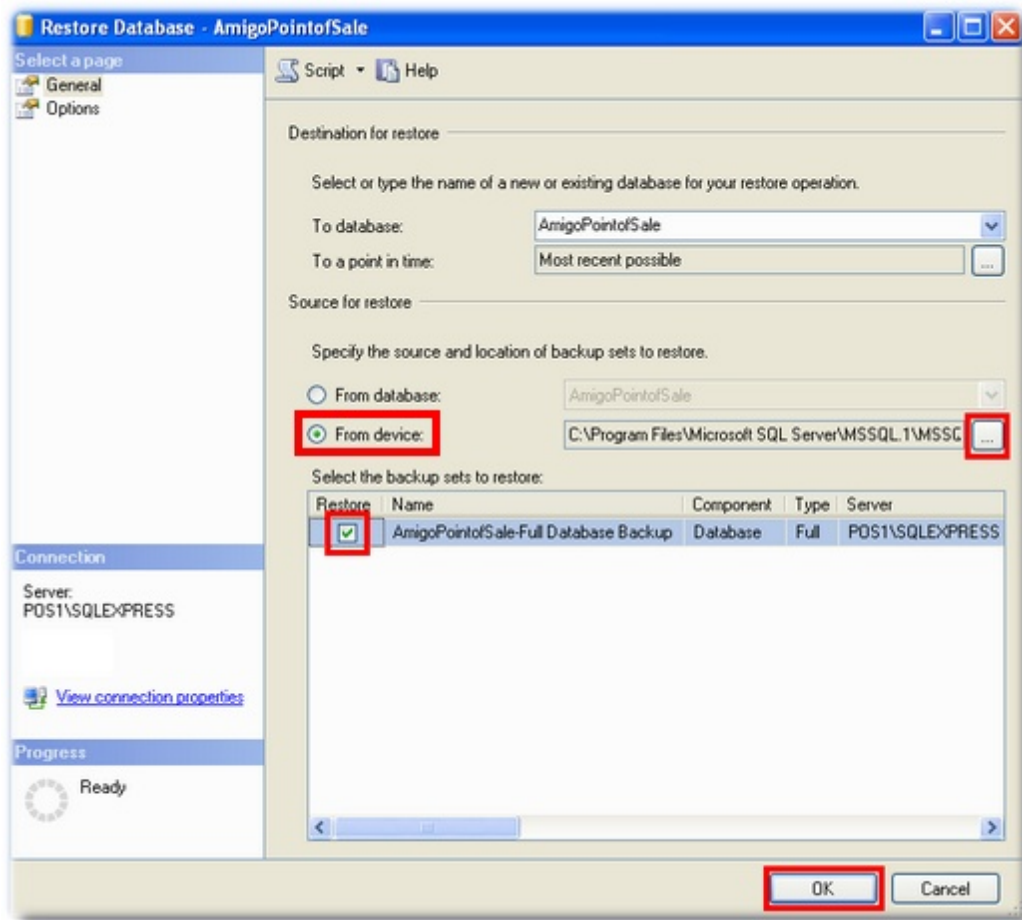
To restore a previously backed up database, open SQL Server Management Studio Express, connect to the server and right-click on the database and select **Tasks - Restore - Database...**, as shown below.



SQL Server Management Studio

Select the database to restore to from the drop-down list and click **From device** under **Source for restore**. Click browse to locate the backup and add it to the list. Ensure that the box under the **Restore** column is checked and click OK to complete the restoration.





Selecting the Backup File to Restore

### 13.9.9 Troubleshooting

Before attempting to troubleshoot the connection, verify the following

1. The server is accessible on the network (open My Network Places on any client PC and look for the server)
2. SQL Server is running
3. Named Pipes and/or TCP protocol on the target instance is enabled (TCP is required when using an IP address instead of a UNC path)
4. sqlservr.exe and/or the TCP port that the server listens is on firewall exceptions list if the firewall is turned on

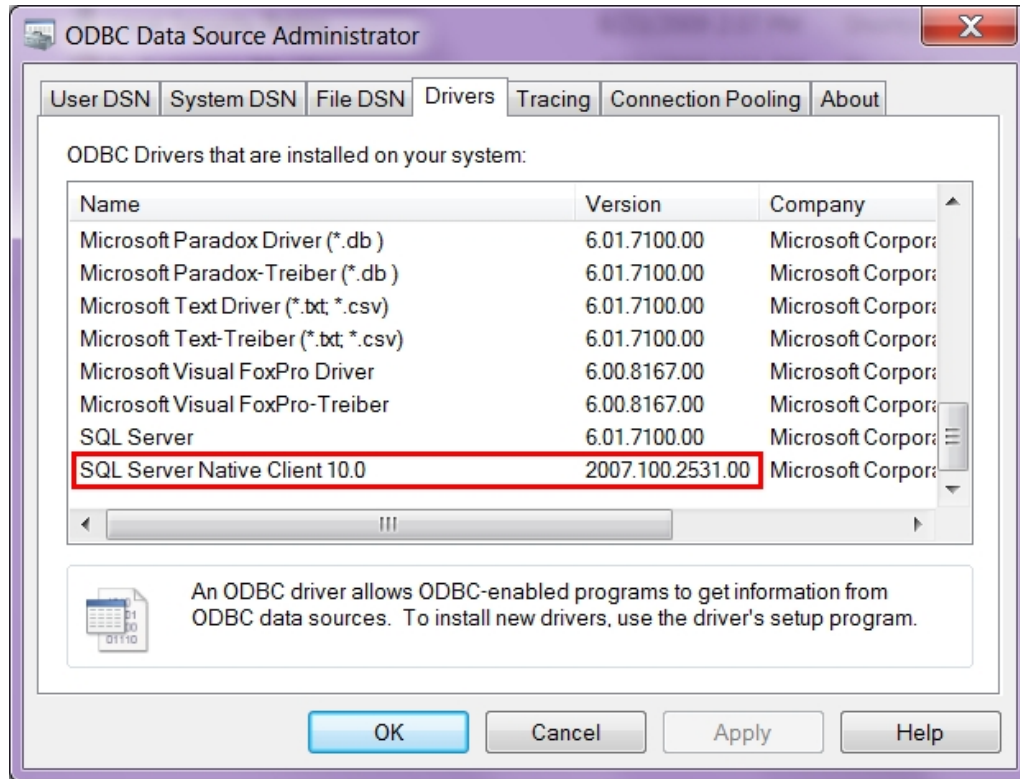
Some common errors are listed below:

- **Named Pipes or Provider Error xxx:** Named Pipes Provider: Could not open a connection to SQL Server [2]

If you have already referred to the [installation and initial setup help topics to confirm](#)<sup>634</sup> that Named Pipes protocol is enabled, Firewalls are properly configured, etc. and you still receive a connection error (generally with the word *Provider* in the description), the local PC may have an outdated SQL Native Client database driver. Referring to the image below, ensure that **SQL Server Client 10.0** is installed (the earlier version intended for SQL

Server 2005 will not work with SQL Server 2008). The ODBC Data Source Administrator can be accessed in **Windows Control Panel > Administrative Tools > Data Sources (ODBC)**. Although AmigoPOS attempts to install the latest SQL Native Client silently at installation, it is sometimes not successful on computers with previous version installed and must be downloaded and installed manually (scroll down to Microsoft SQL Server 2008 Native Client):

- SQL Server 2008 Native Client (32-bit): <http://go.microsoft.com/fwlink/?LinkID=188400&clcid=0x409>
- SQL Server 2008 Native Client (64-bit): <http://go.microsoft.com/fwlink/?LinkID=188401&clcid=0x409>
- SQL Server 2012 Native Client (32-bit): <http://go.microsoft.com/fwlink/?LinkID=239647&clcid=0x409>
- SQL Server 2012 Native Client (64-bit): <http://go.microsoft.com/fwlink/?LinkID=239648&clcid=0x409>



**SQL Server Native Client**

- **Named Pipes Provider Error xxx:** Named Pipes Provider: Could not open a connection to SQL Server [2]

This error message is the most frequent error message when connecting to SQL Server with the SQL Native Client (the driver AmigoPOS uses to communicate with SQL Server). This is a generic error indicating that a connection could not be made. Although the error indicates a named pipes issue, it could be due to any of the following:

1) xxx=53 (network path was not found)

If you got this message, it means the client stack cannot find the target computer. Here are possible reasons for this failure,

- a) misspelled server name, or using "/" rather than "\" between server name and instance name, e.g. "myserver/myinst" is not correct.
- b) name resolution to the server name is not correct, try the following from a command prompt: "ping -a yourserver"
- c) The server computer is firewalled and file sharing is not in the exception list. You need put "File and Printer Sharing" in exception.

2) xxx = 1326 (Logon failure due to unknown user name or bad password)

When you get this error code, it means a) the client stack is able to reach the target computer, and b) the service account of the client application does not have enough credential to make a NP session to the server. NP is based on SMB (file sharing). The logon failure message represented by winerr 1326 is from SMB layer, not SQL Server. You need to make sure you can make a file sharing to the server computer with the same service account. If you cannot make a

file sharing between your server and your client, NP in SQL Server would not success. Try "net use" or "Map Network Drive" to check this. This often happens when server and/or client is not on domain.

3) xxx = 2 (The system cannot find the file specified)

This error message means the client can reach the server but there is no Named Pipe listener with specific pipe name on the target computer. It also means the account can have a file sharing session without a problem. Possible reasons are:

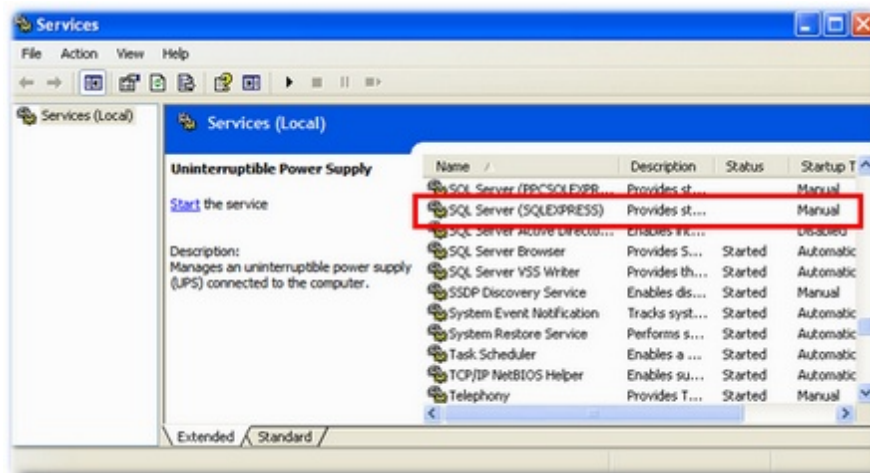
- a) typo in instance name or wrong instance name. The instance name is not the one you are targeting. Note that for default instance, you shouldn't use MSSQLSERVER as instance name.
- b) Target SQL Server is not running
- c) Named Pipe is not enabled on the server. In this case, the SQL server is not listening on the specific pipe name.

4) xxx = 233 (No process is on the other end of the pipe)

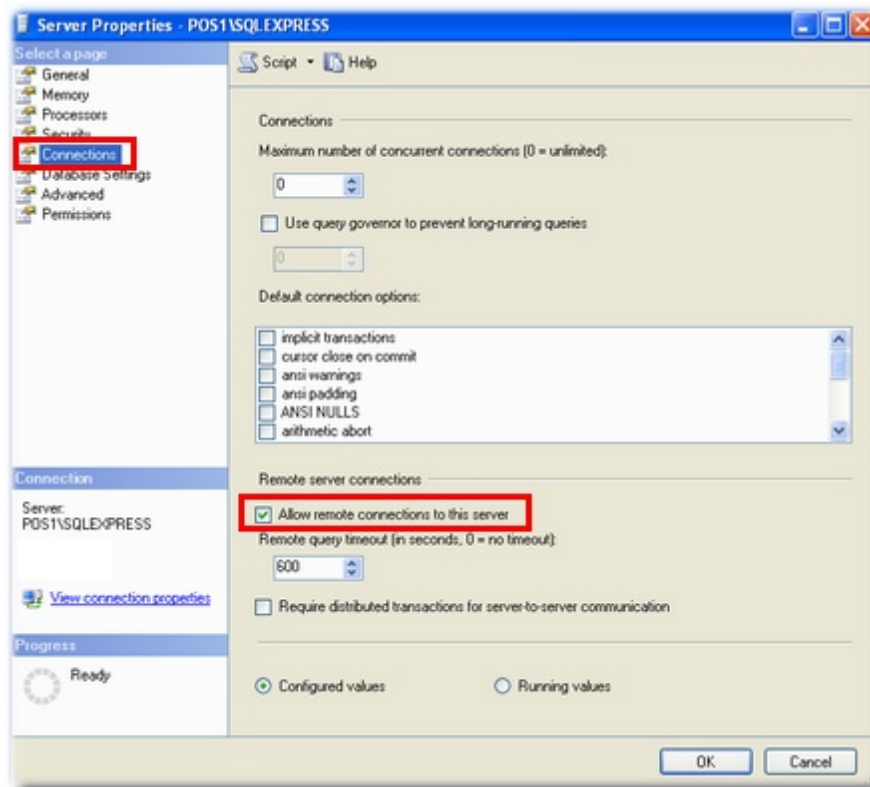
If you see this error, it usually means you don't have sufficient credential to connect to the server, e.g, wrong user name and/or password when you are using SQL authentication. The connection is closed by server before an error message is sent to the client.

If this error occurs on the same computer that is hosting SQL Server, verify that SQL Server is running by **Control Panel - Administrative Tools - Services**. Set the Startup Type to automatic to ensure that SQL Server starts when the PC is rebooted.

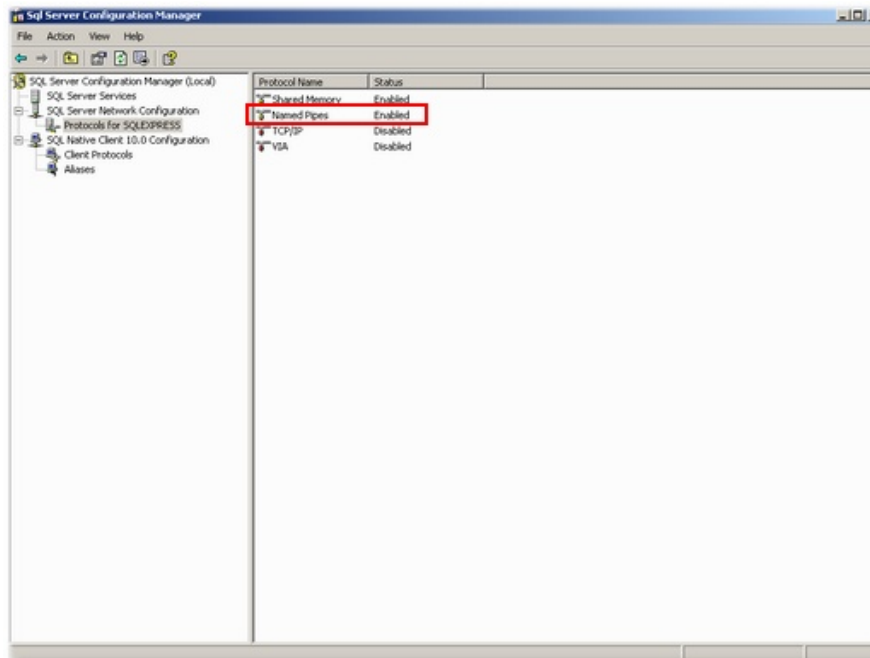
If SQL Server is hosted on another PC and is confirmed to be running, ensure that SQL Server is configured to accept remote connections. If SQL Server is hosted on another PC and is confirmed to be running, verify that Named Pipes protocol is enabled, (b) SQL Server is configured to accept remote connections, and (c) the Windows Firewall is not blocking the SQL Server port.



Windows Services



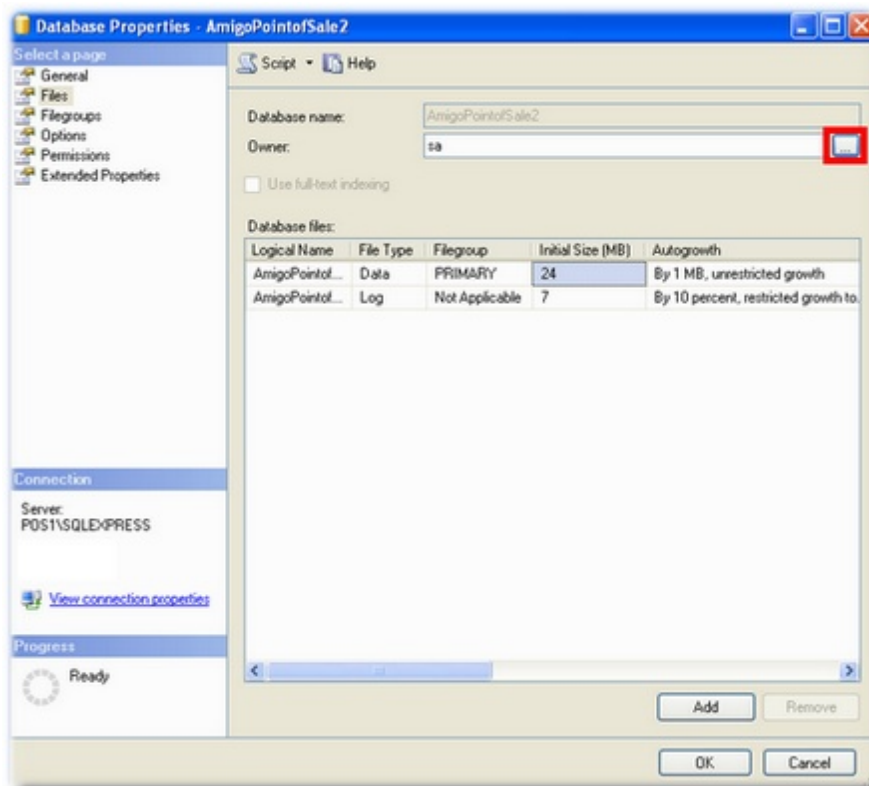
SQL Server Properties



SQL Server Configuration Manager

- **Login Error** (#-2147467259): Cannot open database "AmigoPointOfSale2" requested by the login. The login failed.

This error indicates that either (a) the database does not exist, most likely due to misspelling on the Back Office Database Configuration Screen, or (b) the login does not have permission to access the database



Setting the database owner

Part 14

# Daily Usage

## 14 Daily Usage

### 14.1 Cash Drawers

AmigoPOS 8 can accommodate 2 cash drawers per pos station. Cash drawers are assigned on a per-user basis or set to open depending on the hour of day. Both configurations are described in the [cash drawer installation](#)<sup>[137]</sup> topic. The drawer reset procedure on the manager screen must be performed each time the cash is removed and the drawer is reset. A drawer reset assumes that the cash has been removed from the drawer and the drawer has been restocked with a start amount.

The start amount is set per-drawer/per-pos station and is stored in the local pos station's settings. Most users will use the same start amount each time the drawer is reset and will not need to change the value. For users that change the start amount, the amount can be set each time the drawer is reset

AmigoPOS 8 4/15/2017 3:08 AM

**RESET CASH DRAWER**

My Restaurant  
600 Biscayne Blvd  
Miami, FL 33138  
111-222-3333

**DRAWER REPORT**  
POS STATION 1 - DRAWER 1  
4/15/2017 3:09:01 AM

DRAWER START	\$100.00
TRANSACTIONS (+)	
CASH(2)	\$31.50
CASH PAYOUTS (-)	
PRODUCT DELI(MISC)	\$2.50
CASH IN DRAWER	\$129.00

**POS STATION 1 - DRAWER 1**

START AMOUNT	\$100.00
CASH IN DRAWER	\$129.00
LAST RESET	4/15/2017 12:01 AM

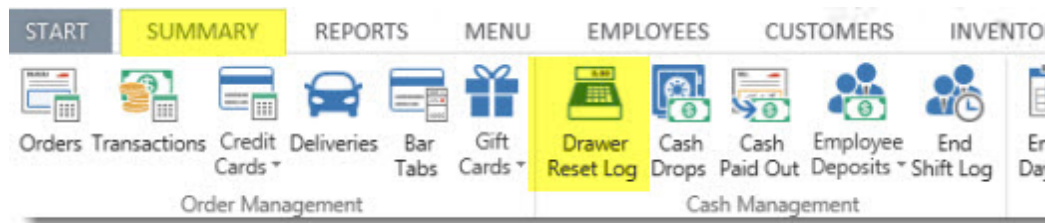
**ALL STATIONS**

OPEN ORDERS TOTAL	\$0.00
SETTLED ORDERS TOTAL	\$31.50

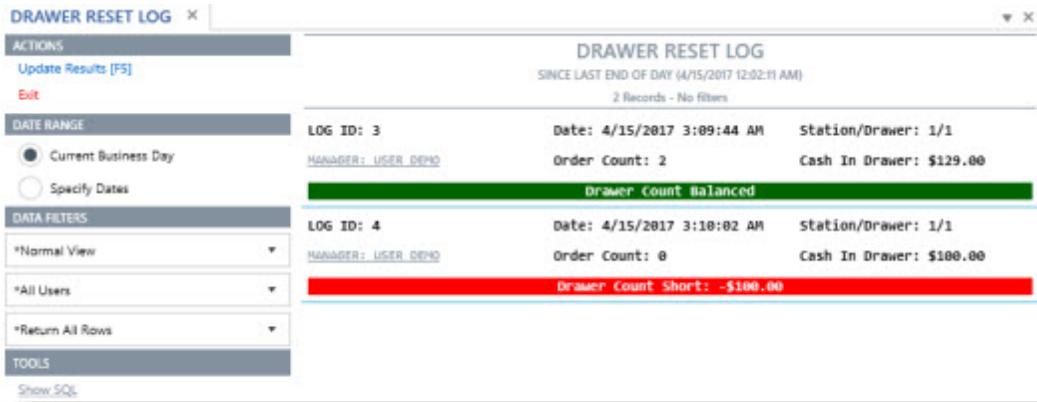
**COUNT DRAWER**

**PRINT**

Always reset all active cash drawers before performing the [End Of Day](#)<sup>[645]</sup> procedure. This is especially important for users that use the automatic End Of Day procedure where the End Of Day is performed automatically at a predetermined time on all pos stations. Drawers that are not reset before the End Of Day procedure can be reset at a later time, but note that driver deposits and server deposits (used for server banking) are used to calculate the current day's driver and server liabilities. Additional information such as non-cash gratuities will not be available if the drawer is reset after the End Of Day procedure is performed.



### Back Office > Summary



### Back Office Drawer Reset Log

Previous drawer reset reports are available in Back Office/Summary/Cash Management. Highlight the log entry and select **Reprint Report** from the drop-down list.

### Server Banking

Server banking is configured in Back Office/Settings/. In order to properly track non-cash gratuities, check the box next to **Deduct non-cash gratuities from server liabilities**. For users that do not disburse non-cash gratuities on a daily basis, uncheck this box. The non-cash gratuities report can be used to track gratuities at a later date.

When non-cash gratuities are disbursed to servers from the cash drawer and server banking is not used, a Payout transaction should be performed. If server banking is used and gratuities are deducted from the server's cash liabilities, a Payout is not required.

### Drawer Reset Report

The drawer reset report can be viewed on the Manager screen by pressing the Cash Drawers button. The user will be prompted to select the cash drawer on multi-drawer pos stations. The report for each drawer contains the following information:

- Start Amount**  
The amount that the drawer started with
- Cash Transactions**  
All cash transactions performed at this cash drawer since the last drawer reset
- Server Deposits** (for server banking environments)  
All server deposits entered at this cash drawer since the last drawer reset
- Driver Deposits**  
All driver deposits entered at this cash drawer since the last drawer reset
- Refunds\***  
All cash refunds processed at this cash drawer since the last drawer reset
- Disbursements\*** (cash paid out)  
All cash payouts performed at this cash drawer since the last drawer reset

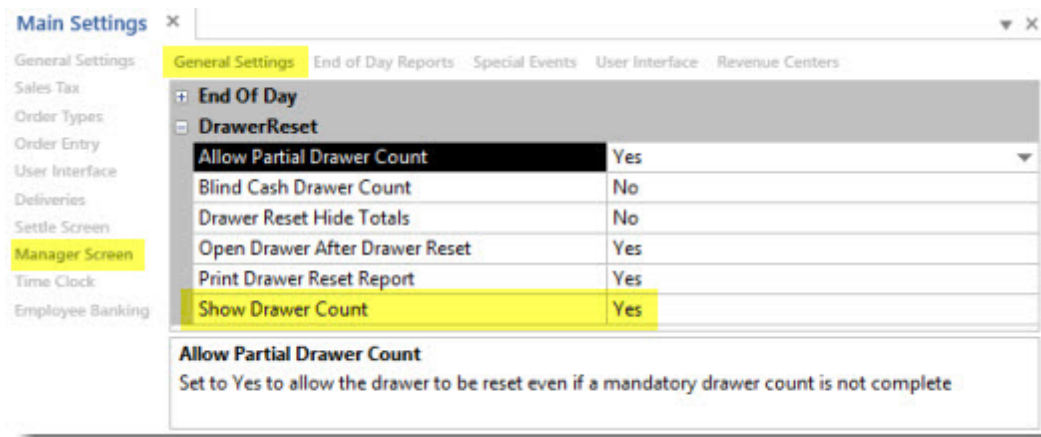


**7. Cash Drops\*** (Bank Deposits)

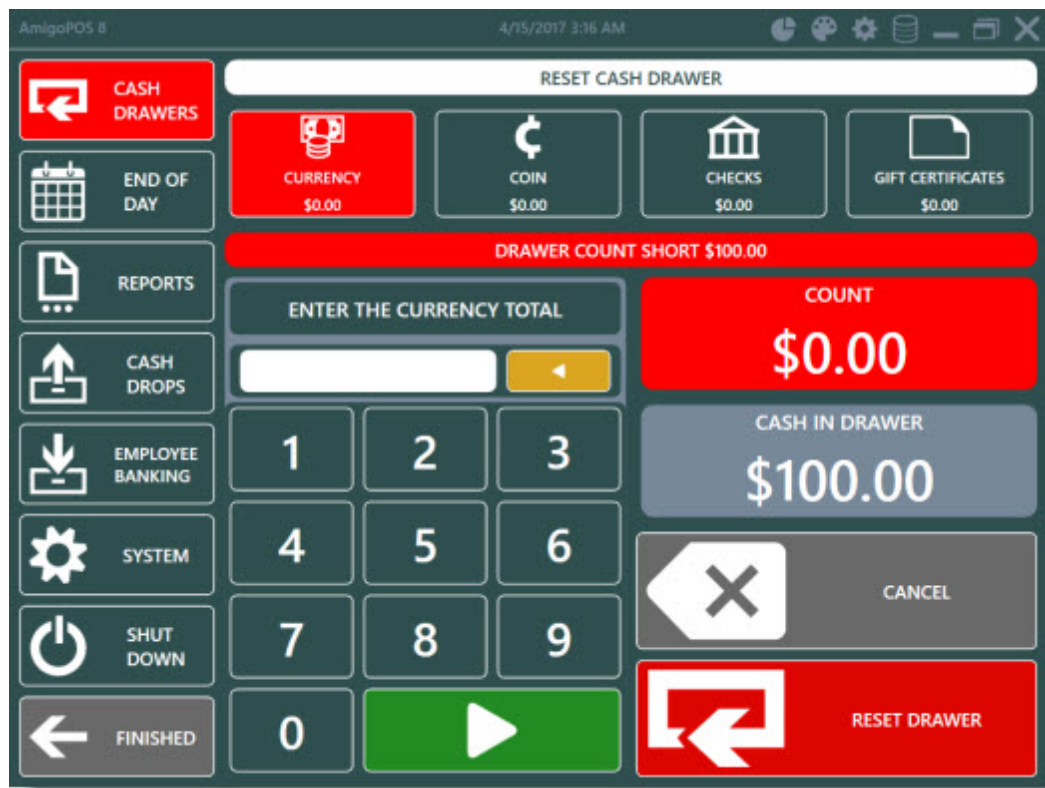
Cash removed from the drawer for deposit ( or dropped into a safe) since the last drawer reset

\*Note that Refunds, Disbursements and Cash Drops are deducted from the total cash in drawer whereas all other items are added to the total.

Non-cash transactions completed at the local pos station are listed for informational purposes only and do not affect the drawer count. When resetting the drawer, only Cash, Gift Certificate and Bank Check transactions are archived. Other transactions are archived when the [End Of Day](#) procedure is completed.



For an additional level of security, the user can be forced to perform a mandatory drawer count. Currency (amount), coin (amount), gift certificates (amount and number) and bank checks (amount and number) are entered into a log and can be recalled in Back Office. The cash over/short amount is displayed on the top button and saved to the drawer reset log. This value is based on expected cash in drawer and does not reflect other transaction types. A summary is printed to the local receipt printer when the count is completed. When using the mandatory drawer count feature, the drawer is not reset until the drawer count is complete. If the drawer count is canceled, the drawer must be reset at a later time.

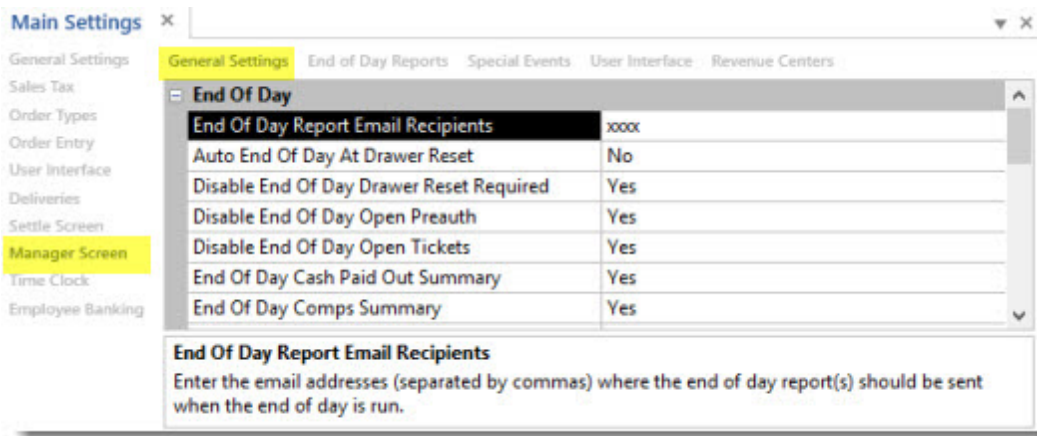


## 14.2 End Of Day

The End Of Day procedure should be performed daily to archive the current business day orders, transactions, cash paid out transactions, delivery log and server banking data. The End Of Day can be run on any pos station after the cash drawer(s) are [reset](#) <sup>640</sup> at every pos station that has been used to settle orders.

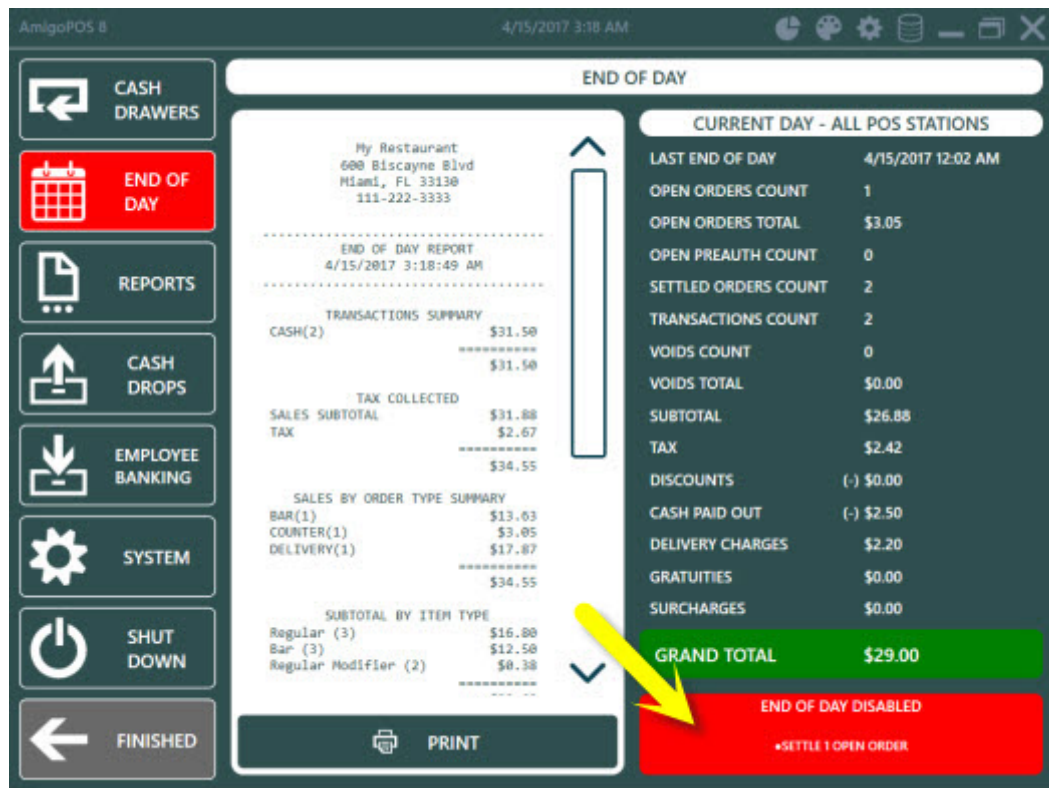
To complete the End Of Day, log in with manager permissions and press the **End Of Day** button on the manager screen. In addition to general sales data shown on the left side of the screen, a customizable report is generated on the right side of the screen. The report summarizes sales by transaction type, sales by order type, server sales, non-cash gratuities, delivery information, order voids, cash paid out and other daily sales data.

Note: The End Of Day report summarizes all data from the current business day, regardless of the cash drawer reset status. When the end of day is completed, sales data from drawers that have not been reset will not be archived and will be carried forward to the next business day. If a cash drawer is reset after the End Of Day is completed, the End Of Day can be performed again. To prevent the End Of Day from being completed when open orders exist, set the value of **Disable End Of Day For Open orders** to True in Back Office/Settings/.



Back Office/Settings/Main Settings/Manager Screen

For proper cash management when using server and/or driver banking, it is essential to reset the cash drawer(s) at each pos station before running the end of day so that all transactions are archived for the next business day. To prevent the End of Day from being completed when all drawers that have had transactions have not been reset, set the value of **Disable End Of Day Drawer Reset Required** to True in Back Office/Settings/. This will disable the Confirm End Of Day button until all drawers are reset.



The report will print to the local receipt printer after the End Of Day is complete. To disable this automatic printing, set the value of **Print End Of Day Report** to False in Back Office/Settings/. The report can be printed at any time by selecting the entry in Back Office/Summary/End Of Day Log and then selecting **Reprint Report** from the drop-down list.

AmigoPOS 8 4/15/2017 3:19 AM

CASH DRAWERS

**END OF DAY**

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

SHUT DOWN

FINISHED

**END OF DAY**

My Restaurant  
600 Biscayne Blvd  
Miami, FL 33138  
111-222-3333

END OF DAY REPORT  
4/15/2017 3:19:45 AM

TRANSACTIONS SUMMARY

CASH(3)	\$34.55
	=====
	\$34.55

TAX COLLECTED

SALES SUBTOTAL	\$31.88
TAX	\$2.67
	=====
	\$34.55

SALES BY ORDER TYPE SUMMARY

BAR(1)	\$13.63
COUNTER(1)	\$3.05
DELIVERY(1)	\$17.87
	=====
	\$34.55

SUBTOTAL BY ITEM TYPE

Regular (3)	\$16.80
Bar (3)	\$12.58
Regular Modifier (2)	\$5.17
	=====
	\$34.55

PRINT

**CURRENT DAY - ALL POS STATIONS**

LAST END OF DAY	4/15/2017 12:02 AM
OPEN ORDERS COUNT	0
OPEN ORDERS TOTAL	\$0.00
OPEN PREAUTH COUNT	0
SETTLED ORDERS COUNT	3
TRANSACTIONS COUNT	3
VOIDS COUNT	0
VOIDS TOTAL	\$0.00
SUBTOTAL	\$29.68
TAX	\$2.67
DISCOUNTS	(-) \$0.00
CASH PAID OUT	(-) \$2.50
DELIVERY CHARGES	\$2.20
GRATUITIES	\$0.00
SURCHARGES	\$0.00
<b>GRAND TOTAL</b>	<b>\$32.05</b>

**RUN END OF DAY**

The user is prompted to confirm once more before the End Of Day is run. This screen can be disabled by setting the value of **Show End of Day Confirmation Screen** to **False**, as described [below](#)<sup>[648]</sup>. New users are encouraged to enable the confirmation screen, since the End Of Day procedure cannot be reversed.

AmigoPOS 8 4/15/2017 3:19 AM

**END OF DAY NOTES**

**SELECT TODAYS WEATHER**

LIGHT RAIN OVERCAST RAIN

SNOW SUN THUNDER

VERY COLD COLD MODERATE HOT VERY HOT

**NOTES**

HOLIDAY INCLIMATE WEATHER NO EVENTS OTHER (DESCRIBE BELOW) ROAD CONSTRUCTION UTILITY DISRUPTION

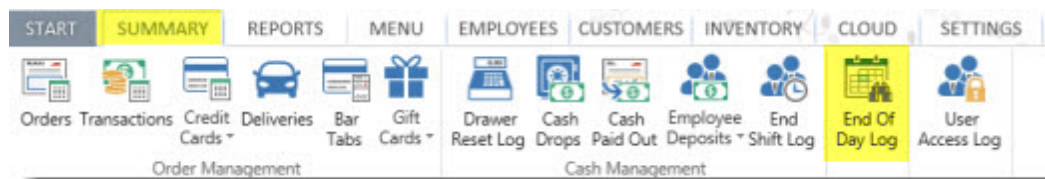
ADD NOTES

SAVE NOTES

After the End of Day is complete, the user can specify the business day's weather and other notes for historical comparison. To disable this feature, set the value of **Show End Of Day Event Weather** to False in Back Office/Settings/



Many common reports are available by pressing the **REPORTS** button. The reports can be configured to print automatically when the End of Day is run (read [below](#) <sup>649</sup> for details). The reports contain current sales data only (data from sales since the last End of Day was run).





**END OF DAY LOG**

Update Results [F5]  
Exit

**DATE RANGE**

☐ Current Business Day  
☒ Specify Dates

From 4/8/2017 To 4/15/2017

**DATA FILTERS**

\*Normal View  
\*All Users  
\*Return All Rows

**TOOLS**  
Show SQL

LOG ID	Date	Special Event	Weather	Temperature
LOG ID: 1	4/15/2017 12:01:58 AM	OTHER (DESCRIBE BELOW)	Sun	Temperature Not Specified
LOG ID: 2	4/15/2017 12:02:11 AM		Thunder	Cold
LOG ID: 3	4/15/2017 3:20:28 AM		Weather Not Specified	Temperature Not Specified
LOG ID: 4	4/15/2017 3:22:41 AM		Weather Not Specified	Temperature Not Specified

Previous end of day reports are available in Back Office/Summary/Cash Management. Highlight the log entry and click **Reprint** to send the report to the receipt printer.

**Main Settings**

General Settings | **General Settings** | End of Day Reports | Special Events | User Interface | Revenue Centers

**End Of Day**

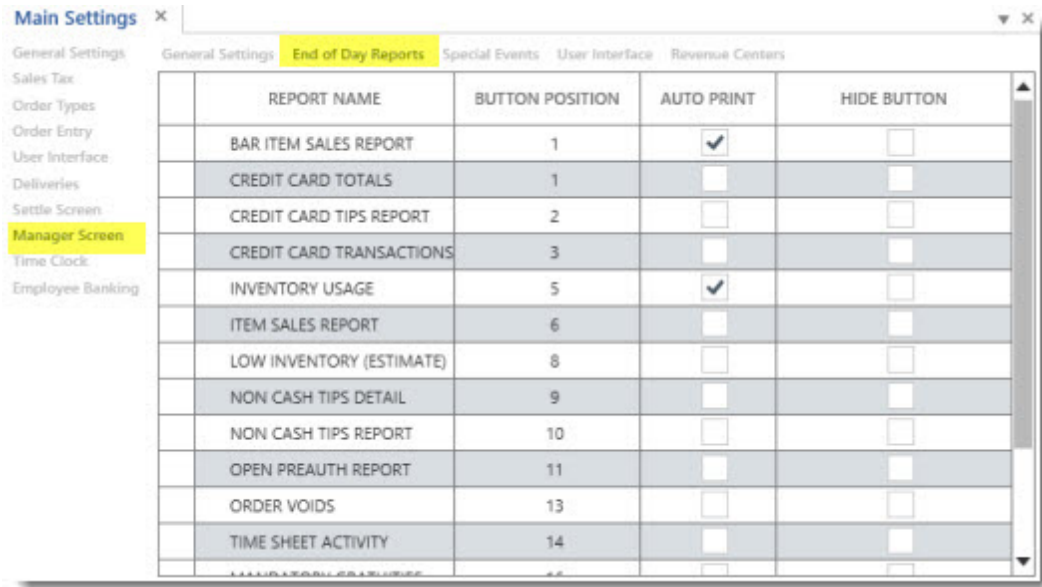
End Of Day Report Email Recipients	xxxx
Auto End Of Day At Drawer Reset	No
Disable End Of Day Drawer Reset Required	Yes
Disable End Of Day Open Preauth	Yes
Disable End Of Day Open Tickets	Yes
End Of Day Cash Paid Out Summary	Yes
End Of Day Comps Summary	Yes

**End Of Day Report Email Recipients**  
Enter the email addresses (separated by commas) where the end of day report(s) should be sent when the end of day is run.

Various End Of Day settings can be customized in Back Office/Settings/Main Settings by clicking on the **MANAGER SCREEN** tab. The database must be synchronized to apply any changes. The following settings are available:

- **Show End Of Day Event Weather:** Prompt the user to specify the weather and any special events when the End Of Day is run
- **Suppress Print End Of Day Report:** Do not print report when End Of Day is run
- **Disable End of Day Open orders:** Do not allow the End Of Day procedure when open orders exist
- **End of Day Transactions Summary:** Show transactions summary on End Of Day report
- **End of Day Order Type Summary:** Show sales by order type summary on End Of Day report
- **End of Day Server Sales Summary:** Show sales by server summary on End Of Day report
- **End of Day pos station Sales Summary:** Show pos station sales summary on End Of Day report
- **End of Day Deliveries Summary:** Show deliveries summary on End Of Day report
- **End of Day Cash Paid Out Summary:** Show cash paid out summary on End Of Day report
- **End of Day Refunds Summary:** Show refunds summary on End Of Day report
- **End of Day Removed Items Summary:** Show removed items summary on End Of Day report
- **End of Day Subtotal By Item Type Summary:** Show subtotal by menu type summary on End Of Day report

- **End of Day Tax Collected:** Show tax collected summary on End Of Day report
- **Disable End of Day Open PreAuth:** Do not allow the End Of Day procedure when open pre-authorized (but not captured) transactions exist.
- **Exclude Bartenders From Bar Sales Report:** When displaying the **Bar Sales by Server** report, do not include bartenders on the list.
- **Include Tax In Bar Sales Report:** When displaying the **Bar Sales by Server** report, do not include tax when calculating totals
- **Show End of Day Confirmation Screen:** When the user press the **Confirm End Of Day** button, show another confirmation screen before the End of Day is run



REPORT NAME	BUTTON POSITION	AUTO PRINT	HIDE BUTTON
BAR ITEM SALES REPORT	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CREDIT CARD TOTALS	1	<input type="checkbox"/>	<input type="checkbox"/>
CREDIT CARD TIPS REPORT	2	<input type="checkbox"/>	<input type="checkbox"/>
CREDIT CARD TRANSACTIONS	3	<input type="checkbox"/>	<input type="checkbox"/>
INVENTORY USAGE	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ITEM SALES REPORT	6	<input type="checkbox"/>	<input type="checkbox"/>
LOW INVENTORY (ESTIMATE)	8	<input type="checkbox"/>	<input type="checkbox"/>
NON CASH TIPS DETAIL	9	<input type="checkbox"/>	<input type="checkbox"/>
NON CASH TIPS REPORT	10	<input type="checkbox"/>	<input type="checkbox"/>
OPEN PREAUTH REPORT	11	<input type="checkbox"/>	<input type="checkbox"/>
ORDER VOIDS	13	<input type="checkbox"/>	<input type="checkbox"/>
TIME SHEET ACTIVITY	14	<input type="checkbox"/>	<input type="checkbox"/>

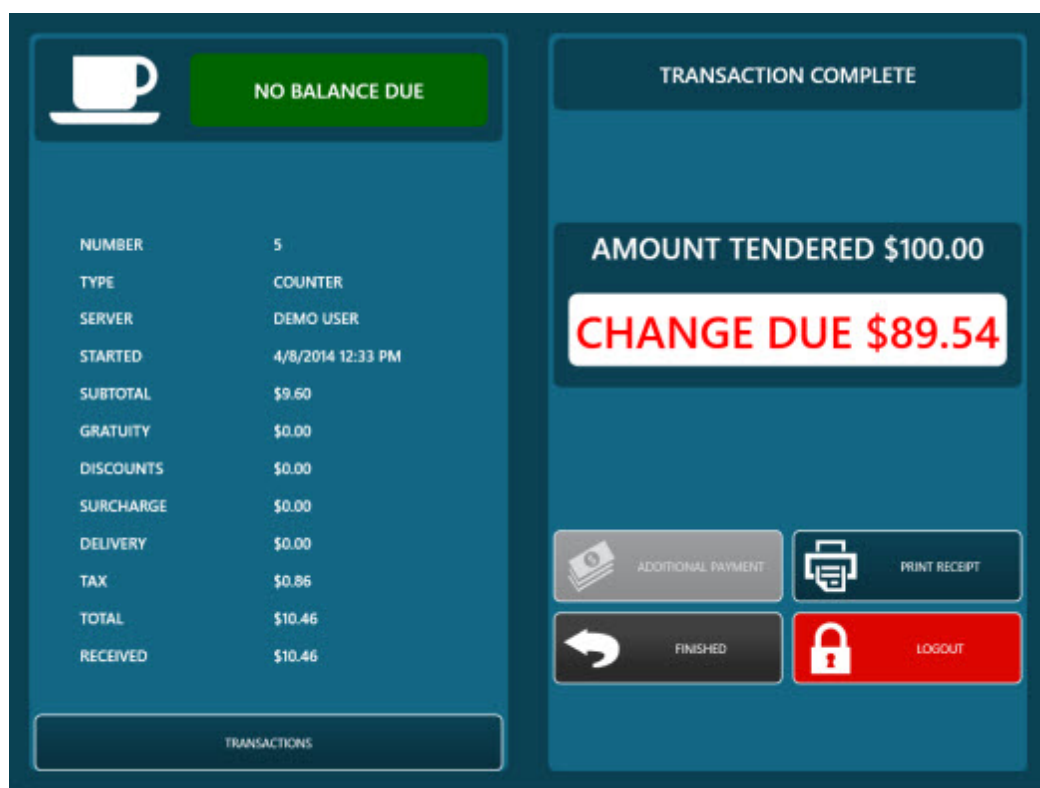
The End Of Day reports list can be customized in Back Office/Settings/Main Settings by clicking on the MANAGER SCREEN tab. The database must be synchronized to apply any changes. The following settings are available for each report:

- **Report Name:** The text that appears on the report button
- **Button position:** The position of the report button relative to the button position of other report buttons
- **Auto-Print End Of Day:** Set to True to print this report automatically when the End Of Day procedure is performed
- **Disable:** Hide this report

## 14.3 Transactions Management

Each order will have on or more associated tender transactions. In some cases, a customer may wish to use multiple payment methods. The order will not be considered settled until the balance due is zero. The order will also continue to appear on the order selection screens until the balance due is zero. Review the [Settle order](#)<sup>927</sup> help topic for additional details





**Change Due Screen**

The cash drawer will open for some transaction types. Press the **ADDITIONAL PAYMENT** button to add another payment to the order. The **ADDITIONAL PAYMENT** will not appear if the order balance due is zero.

The screenshot displays the Amigo POS interface. On the left, a coffee cup icon is next to a green button labeled "NO BALANCE DUE". Below this is a transaction summary table. On the right, a "TRANSACTIONS" section shows a void confirmation for a cash transaction of \$10.46. A red "VOID" button is present. At the bottom, a yellow box highlights a "TRANSACTIONS" button, and a "FINISHED" button is also visible.

NUMBER	5
TYPE	COUNTER
SERVER	DEMO USER
STARTED	4/8/2014 12:33 PM
SUBTOTAL	\$9.60
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.86
TOTAL	\$10.46
RECEIVED	\$10.46

**TRANSACTIONS**

CASH \$10.46  
4/11/2014 21:40 DEMO USER

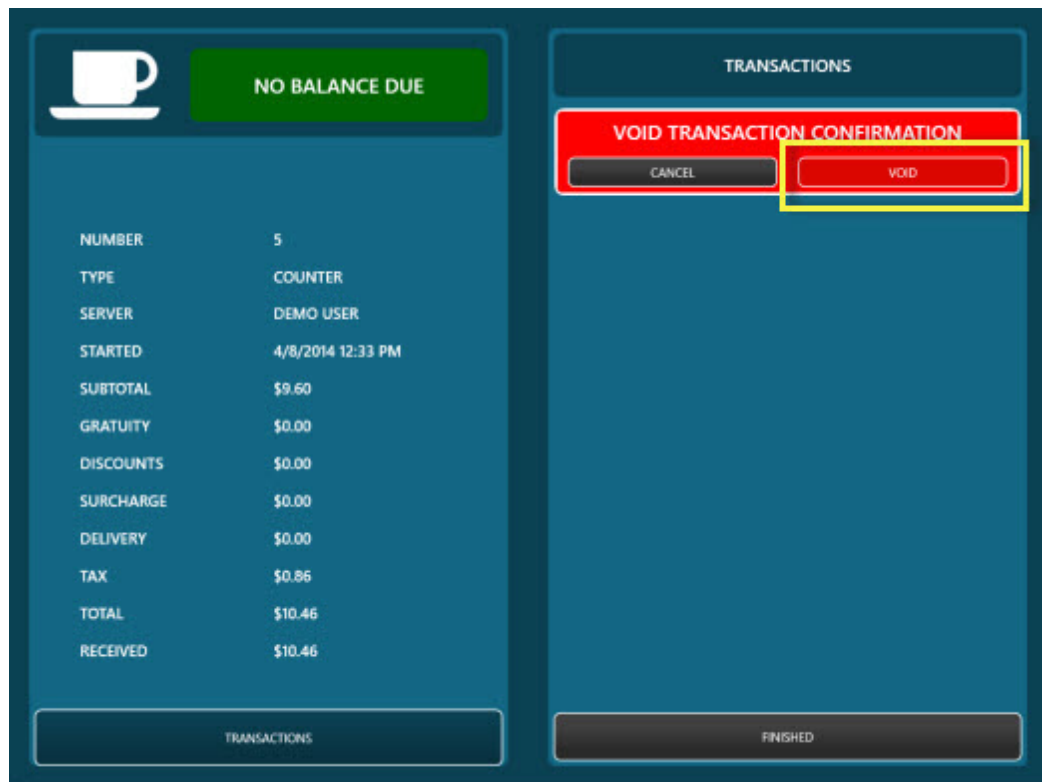
**VOID**

**TRANSACTIONS**

**FINISHED**

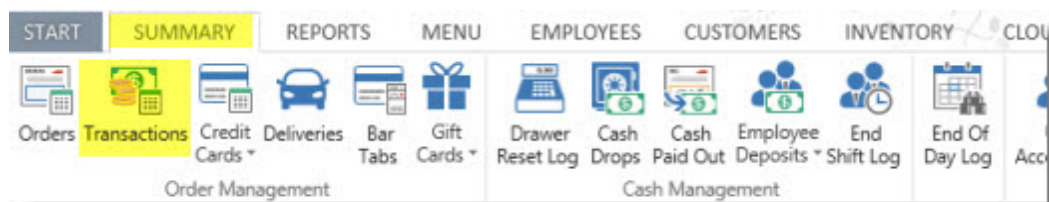
### Transactions List

Review the information displayed on the void transaction confirmation prompt. If correct, press the **VOID** button.



### Void Transaction Confirmation

If a mistake is made, the void transaction can be reversed by selecting the transaction in Back Office/Summary/Transactions Summary.



TRANSACTIONS

ACTIONS

Update Results [F5]

Exit

DATE RANGE

☐ Current Business Day
 ☒ Specify Dates

From 4/8/2017
 To 4/15/2017

DATA FILTERS

\*Normal View

\*All Users

\*Include Voids

\*Return All Rows

ADVANCED FILTERS

TRANSACTIONS SUMMARY

Date Range: 4/8/2017 6:00:00 AM - 4/16/2017 5:59:59 AM

6 Records - No filters

#1 - HOUSE ACCOUNT	Order #3	Amount: \$4.41
Cashier: USER DEMO	Station/Drawer: 1/1	Gratuity: \$0.00
Tendered: \$4.41	4/13/2017 9:30:18 AM	Drawer Reset ID: 2
<div>ORDER DETAILS</div> <div>DELETE TRANSACTION</div> <div>VOID TRANSACTION</div> <div>CUSTOMER RECEIPT</div>		
#2 - HOUSE ACCOUNT	Order #3	Amount: \$1.36
Cashier: USER DEMO	Station/Drawer: 1/1	Gratuity: \$0.00
Tendered: \$1.36	4/13/2017 9:36:08 AM	Drawer Reset ID: 2
#3 - CASH	Order #4	Amount: \$1.00
Cashier: USER DEMO	Station/Drawer: 1/1	Gratuity: \$0.00
Tendered: \$50.00	4/15/2017 12:01:48 AM	Drawer Reset ID: 2
#4 - CASH	Order #6	Amount: \$13.63
Cashier: USER DEMO	Station/Drawer: 1/1	Gratuity: \$0.00

Part 15

# Deliveries

## 15 Deliveries

### 15.1 Overview

AmigoPOS includes a comprehensive delivery module with the ability to track delivery orders by custom phone number. The simple 3 step process handles the delivery from start to finish; the last two steps can be skipped if your business does not:

- **Step 1 - Take Order:** Enter the order by selecting the Delivery order type under the New Orders button group on the main screen
- **Step 2 - Check-Out Driver:** To send the driver on a new delivery trip, open the Deliveries screen, select the driver and assign one or more orders to the driver to print a trip summary
- **Step 3 - Check-In Driver:** When the driver has returned, return to the Deliveries screen and select the driver to check-in or settle the delivery orders

Customers are tracked by phone number, enabling the system to recognize a customer from caller-id data. In addition, a customer may have an unlimited number of locations and phone number assigned so that the customer's orders can be tracked regardless of the delivery address.

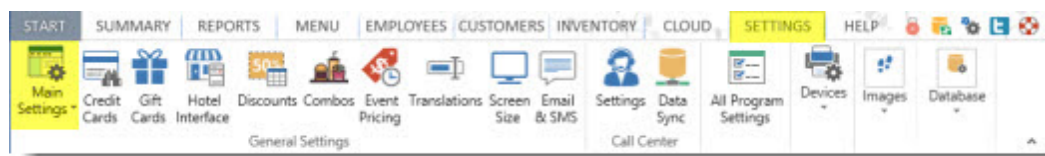
The primary customer information includes:

- First Name
- Last Name
- Email address
- Send Offers: Allow email offers to be sent. For users that wish to reduce spam and ask the customer for permission to send email
- Tax Exempt: Set this value to true to mark the entire order as tax exempt, regardless of order type
- Loyalty Card # (For the upcoming loyalty card features)
- Customer Since: Date of the customer's first order

Each customer definition must have at least one location assigned. Each location's information includes:

- Customer Id: The unique customer id generated when the customer's primary is first saved
- Location Name: A unique name identifying the location (i.e. home, work, etc)
- Phone number
- Phone Extension: Numeric phone extension. This allows company/office complex order tracking where the same phone number may have many different extensions. Note that the company name can be used in place of the customer name in the customer's primary information.
- Street Number
- Street Address
- Street Address (2)
- City
- State/Province
- Postal Code
- Additional Notes:
- Delivery Zone

Many options can be enabled on the Order Type setup screen in Back Office/Settings/Main Settings by clicking the Order Types tab. Additional settings are available by clicking the Deliveries tab. Review the [Order Types](#) <sup>967</sup> help topic for additional information.



Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
General Settings	Sales Tax	Order Types	Order Entry	User Interface

ORDER TYPE SETTINGS																							
<div>BAR</div> <div>COUNTER</div> <div>DELIVERY</div> <div>DINE-IN</div> <div>DRIVE-THRU</div> <div>PICK-UP</div>	<div>General Settings</div> <table border="1"> <tr> <td>Order Type Name</td> <td>DELIVERY</td> </tr> <tr> <td>Hide Button At All Stations</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Hide Button At This Station*</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Button Position</td> <td>3</td> </tr> <tr> <td>Charge Takeout Containers</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Default Menu Category</td> <td></td> </tr> <tr> <td>Print Suggested Gratuities</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Loyalty Card Prompt</td> <td><input type="checkbox"/></td> </tr> </table> <div>Surcharges</div> <table border="1"> <tr> <td>Surcharge Text</td> <td>SURCHARGE</td> </tr> <tr> <td>Surcharge Type</td> <td></td> </tr> <tr> <td>Surcharge Amount</td> <td>0</td> </tr> </table> <div>Hide Button At All Stations</div> <p>If this setting is enabled, the order type will not appear on the main screen and will not be available on the order entry screen</p>	Order Type Name	DELIVERY	Hide Button At All Stations	<input type="checkbox"/>	Hide Button At This Station*	<input type="checkbox"/>	Button Position	3	Charge Takeout Containers	<input checked="" type="checkbox"/>	Default Menu Category		Print Suggested Gratuities	<input checked="" type="checkbox"/>	Loyalty Card Prompt	<input type="checkbox"/>	Surcharge Text	SURCHARGE	Surcharge Type		Surcharge Amount	0
	Order Type Name	DELIVERY																					
	Hide Button At All Stations	<input type="checkbox"/>																					
	Hide Button At This Station*	<input type="checkbox"/>																					
	Button Position	3																					
	Charge Takeout Containers	<input checked="" type="checkbox"/>																					
	Default Menu Category																						
	Print Suggested Gratuities	<input checked="" type="checkbox"/>																					
	Loyalty Card Prompt	<input type="checkbox"/>																					
	Surcharge Text	SURCHARGE																					
	Surcharge Type																						
	Surcharge Amount	0																					

Open the order type configuration screen in Back Office/Settings/Main Settings and verify that the box next to the **Show Phone Number** field is checked next to the Delivery order type to prompt the user for the customer's phone number. Press enter (or use the record navigator to change rows) to update the database.

The customer phone number must be configured for your area. Some areas in the United States of America use multiple area codes in a small area. If this is the case, select a phone length of 10 (3-digit area code + 7 digit-phone number). Similarly, many mobile phone numbers in Europe have a different area code than the local area code, in which case the phone number length should be adjusted to allow for the area code to be entered. In some areas of Europe, the mobile and land line numbers may use a different number of digits. In that case, enter the length of the longer number and use leading zeros to compensate for the shorter number on the order entry screen (or disable phone number verification to allow phone numbers of any length).

General Settings	Sales Tax	Order Types	Order Entry	User Interface
<b>Deliveries</b>	Settle Screen	Manager Screen	Time Clock	Employee Banking
General Settings	<b>Phone Number Format</b>	Delivery Zones	Mapping	

DELIVERY SETTINGS	
Phone Number Format Length	7
Phone Number Format Length Group 1	3
Phone Number Format Length Group 2	4
Phone Number Format Length Group 3	1
Phone Number Format Numbers Only	No
Phone Number Verify Length	Yes

<b>Phone Number Format Length</b> When formatting a phone number, assume this number of digits will be entered
---

To force the user to enter the number of digits defined by **Phone number length** whenever a phone number is entered (recommended), check the box next to **Verify phone number length**. If phone number formatting is enabled, adjust the phone number groups so that the phone number is formatted correctly with a dash between each group of numbers.

Delivery zones provide an easy method of charging different delivery rates depending on the customer. Each customer location can be assigned a different delivery zones. Delivery zones are added on the customer information screen and are modified on the Back Office/Settings/Main Settings/Deliveries screen. **At least one (enabled) delivery zone is required, even if the zone charge is set to zero.**

General Settings	Sales Tax	Order Types	Order Entry	User Interface
<b>Deliveries</b>	Settle Screen	Manager Screen	Time Clock	Employee Banking
General Settings	Phone Number Format	<b>Delivery Zones</b>	Mapping	

DELIVERY ZONES					
	NAME	DESCRIPTION	BUTTON POSITION	CHARGE	FREE LIMIT
+	Click here to add a new row				
	North End	North	1	\$2.20	\$25.00
	Web Order	Default Web Order Delivery Zone	1	\$2.50	\$0.00
	Free Web Order	Default Free Web Order Delivery Zone	1	\$0.00	\$0.00
	Downtown	Downtown	2	\$2.75	\$0.00
	West Side	West	3	\$1.00	\$0.00

A new delivery zone is added in **Back Office>Settings>Main Settings>Deliveries>Delivery Zones** by entering the name/description/charge on the top line and pressing the Enter key.



CUSTOMER INFORMATION

ENTER THE PHONE NUMBER

111-2222

EXTENSION

1 2 3

4 5 6

7 8 9

0

CUSTOMER LOOKUP

FIRST OR LAST NAME

1 Wall Street Building  
111-2222  
1 Wall Street

RECENT CALLS

1 2 3 4 5 6 7 8 9 0 - @

Q W E R T Y U I O P \* @

A S D F G H J K L %

Z X C V B N M > .

→

#### Customer phone number entry

If callerid is enabled on the local pos station, a list of the 25 most recent calls appears on the right side of the screen. Select a caller id entry and press the **CONTINUE** button to look up the customer.

**CUSTOMER INFORMATION**

**1 Wall Street Building**

PHONE 111-2222

FIRST ORDER 2/11/2016

LAST ORDER 2/11/2016

ORDERS 0

TOTAL \$0.00

AVERAGE \$0.00

Primary 111-2222

North End \$2.20 (\$25.00 FREE)

LAST NAME **1 Wall Street Building** FIRST NAME

ADDRESS 1 Hall Street

ADDRESS 2

CITY/STATE/ZIP New York NY 10005

NOTES

EMAIL louisia@amigopos.com TAXABLE

**CANCEL** **ORDERS** **LOYALTY** **ACCOUNT** **ROUTE** **MAP** **CONTINUE**

1 2 3 4 5 6 7 8 9 0 - @

Q W E R T Y U I O P \* @

A S D F G H J K L % `

Z X C V B N M > .

**→**

### New customer information entry

If the customer has ordered previously with the phone number, the previously customer information will appear. Make any necessary changes and press **ACCEPT** to start the order. If the customer has never ordered before, enter the required information and press **ACCEPT** to continue or **CANCEL** to skip this step. For customers that order the same items regularly, press the **VIEW PREVIOUS ORDERS** button to view a list of the customer's previous orders. A previous order can be reordered by selecting the order from the list pressing the **REORDER** button. Orders are listed by date with the most recent orders at the top of the list. The new order appears on the order entry screen where any changes can be made.

**CUSTOMER INFORMATION**

**1 Wall Street Building**

PHONE 111-2222

FIRST ORDER 2/11/2016

LAST ORDER 2/11/2016

ORDERS 0

TOTAL \$0.00

AVERAGE \$0.00

**NEW CUSTOMER LOCATION**

LOCATION NAME

PHONE

EXTENSION

CANCEL SAVE

1 2 3 4 5 6 7 8 9 0 - @

Q W E R T Y U I O P \* @

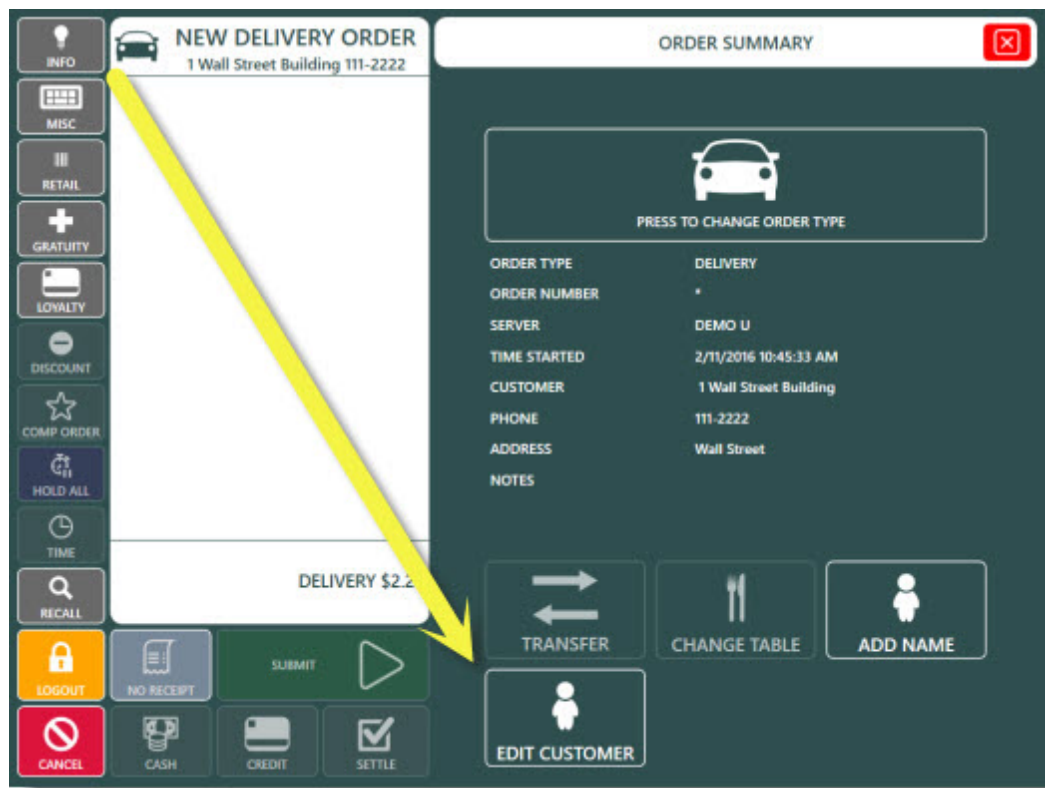
A S D F G H J K L % `

Z X C V B N M > .

→

#### Adding an additional customer location

An additional customer location is added by pressing the green button next to the existing customer locations list. Enter at least the location name and phone number and press **SAVE** to continue or **CANCEL** to return to the customer information screen. Note that an additional customer location cannot be added until a new customer's primary location data is saved.



Order Entry Screen

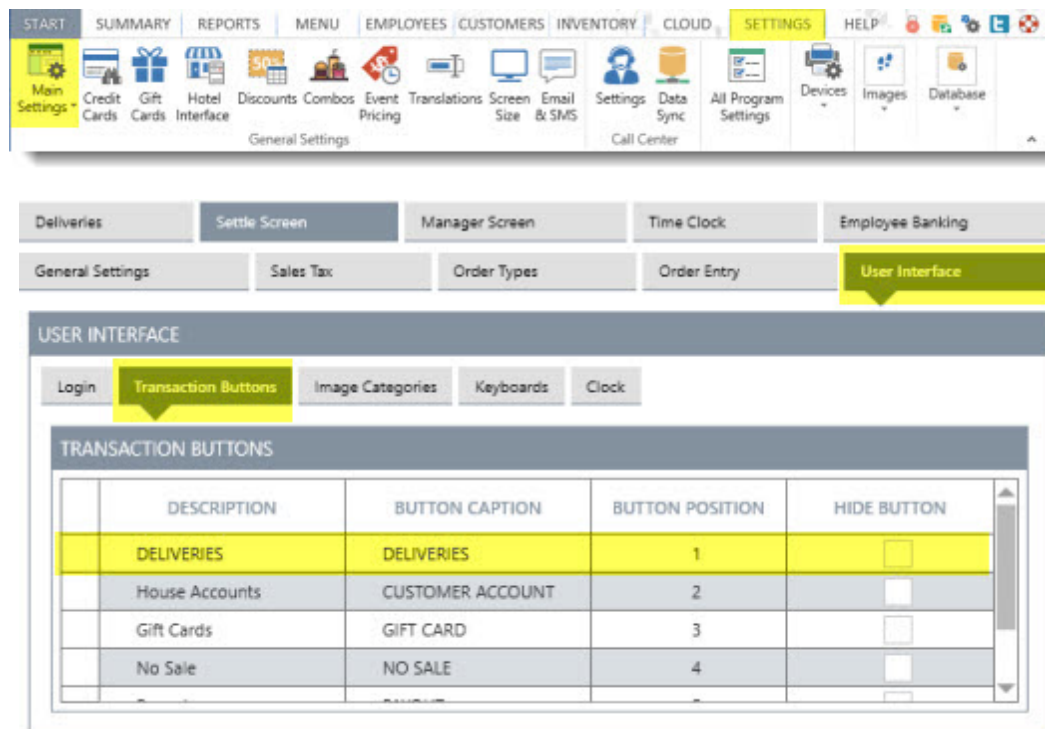
After an order is started, the customer information can be accessed or changed by pressing the INFO button followed by the EDIT CUSTOMER button on the order entry screen.

## 15.2 Driver Management

AmigoPOS uses the Deliveries screen to assign orders to drivers. The deliveries screen is accessed (after logging in) under the Open Orders button group on the main screen. Note that the Deliveries button position can be adjusted in Back Office/Settings/ Main Settings/User Interface so that it is visible without pressing the down arrow to scroll, as shown below. The button text can be customized by changing the value under the **Button Caption** column.

The use of the deliveries screen is not mandatory to use the delivery order type. If the delivery screen is not used, delivery orders can be settled normally. In addition to assigning orders to drivers, the deliveries screen offers the ability to consolidate order and customer information (name, address, phone) on a single trip order to simplify information and reduce errors. In addition, the driver can settle multiple orders simultaneously or check-in the orders for settlement at a later time. Review the following sections to customize and use the delivery screen:

- [Configuration](#) <sup>662</sup>
- [Check Out/In](#) <sup>664</sup>
- [Driver Deposits](#) <sup>668</sup>
- [Force Deposits](#) <sup>669</sup>
- [End Shift](#) <sup>669</sup>



### Configuration

Various options are available to customize the behavior of the Deliveries screen. Navigate to Back Office/Settings/Main Settings/Deliveries and review the settings for the Alerts and Delivery Screen categories. The following settings are available:

- **Delivery Alerts Enabled\***: Set to Yes to show the delivery alert popup for delivery orders that have not been sent out within the predefined intervals
- **Sound Alert Enabled\***: Set to Yes to play a sound on the local POS Station when a delivery alert is issued
- **Warning Minutes\***: Select the number of minutes to wait before a yellow alert is issued
- **Late Minutes\***: Select the number of minutes to wait before a red alert is issued
- **Auto Customer Lookup Minimum Digits**: Enter the minimum number of digits required before the auto-lookup is performed as the phone number is entered
- **Customer List Length Limit**: Maximum number of items to show on customers lookup list on order entry screen (use small number for slower systems)
- **Delivery Charge Tax Rate**: When adding a new delivery zone on the customer information screen, the default delivery charge tax rate id (applies only when the delivery charge is taxable). This value can be changed on the delivery zones screen in back office.
- **Delivery Screen Force Deposit Amount**: Enter the cumulative maximum amount that the driver should have outstanding before a deposit is forced. Used in conjunction with the `DeliveryScreenForceDeposit` Yes/No setting.
- **Delivery Status Update Interval**: Enter the interval in seconds to pause between updates of late delivery status (and driver status on delivery screen)
- **Driver Delivery Charge Payout Reason**: Enter the cash payout reason id to use when entering a cash payout to offset the driver delivery charges. This setting requires the `DriverReportDeductDeliveryCharges` setting to be enabled.

- **Driver Gratuity Payout Reason:** Enter the cash payout reason id to use when entering a cash payout to offset the driver non-cash gratuities. This setting requires the `DriverReportDeductNonCashGratuities` setting to be enabled.
- **Driver Payout Vendor:** Select the paid out vendor id to use when entering a cash payout to offset the driver non-cash gratuities or delivery charges.
- **Driver Permission:** Select the permission corresponding to the driver job type (used on Deliveries screen and Driver Deposits screen)
- **Allow Driver Deposits:** Set to Yes to accept driver deposits on the manager screen
- **Clocked-In Drivers Only:** Set to Yes to show only drivers that are clocked-in on the delivery screen
- **Default Delivery Zone Tax Status:** This value sets the initial tax status when entering a new delivery zone on the customer data screen
- **Delivery Screen Force Deposit:** Set to Yes to prevent the driver from accepting deliveries until a deposit is made. Used in conjunction with the `DeliveryScreenForceDepositAmount` numeric setting.
- **Disable Auto Customer Phone Lookup:** Set to Yes to disable the customer lookup list from refreshing as the phone number is entered
- **Driver Check-In Edit Disable:** When checking in delivery orders, the delivery order total and payment type cannot be edited
- **Driver Check-In Only Disable:** When checking in delivery orders, the orders must be settled (check-in is not allowed)
- **Driver Report Deduct Delivery Charges:** Set to Yes to deduct the delivery charges collected from the liability total on the driver liability report
- **Driver Report Deduct Non Cash Gratuities:** Set to Yes to deduct the non-cash gratuities received from the liability total on the driver liability report
- **Driver Report Show Delivery Charges:** Set to Yes to itemize the sum of the delivery charges collected by each driver on the driver liability report
- **Driver Report Show Tips Collected:** Set to Yes to itemize the sum of the tips collected by each driver on the driver liability report
- **Driver Report order Details:** Set to Yes to itemize each order on the driver liability report
- **Driver Report Transaction Details:** Set to Yes to itemize the sum of transactions for each payment type on the driver liability report. Set to No to show the cash total only.
- **Reprint Driver orders Default Value:** The default value of the reprint orders buttons on the driver routing screen
- **Show Driver Delivery Count:** Set to Yes to show the number of deliveries that the driver has for the current trip and for the current business day
- **Show Driver Statistics:** Show driver statistics at the top of the driver routing screen

**\*Local setting must be configured at each POS Station**

General Settings	Sales Tax	Order Types	Order Entry	User Interface
<b>Deliveries</b>	Settle Screen	Manager Screen	Time Clock	Employee Banking
General Settings	Phone Number Format	Delivery Zones	Mapping	

DELIVERY SETTINGS	
Customer Info User Defined Field 3 Label	COMMERCIAL TERMS
Default Customer City	New York
Default Customer Location Name	DEFAULT
Default Customer Postal Code	10001
Default Customer State	NY
Delivery Alert Minutes	30
<b>Delivery Out Message</b>	The driver is in route with your order
Delivery Out Subject	Order Update
Delivery Transfer Order To Driver	Yes

**Delivery Out Message**  
Enter the message body to use when sending a delivery sent out notification

A subset of the settings listed above that are specifically related to employee banking are available in Back Office/Settings/ Main Settings/Employee Banking.

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	<b>Employee Banking</b>
Server Banking	<b>Driver Banking</b>			

DRIVER BANKING	
<b>Clocked In Drivers Only</b>	No
Delivery Transfer Order To Driver	Yes
Driver Banking	No
Driver Delivery Charge Payout	DRIVER DELIVERY
Driver Gratuity Payout	DRIVER TIPS
Driver Job Type	DRIVER
Driver Payout Vendor	EMPLOYEE
Driver Report Deduct Delivery Charges	Yes
Driver Report Deduct Non Cash Gratuities	Yes

**Clocked In Drivers Only**  
Set to Yes to show only drivers that are clocked-in on the delivery screen

### Check Out/In

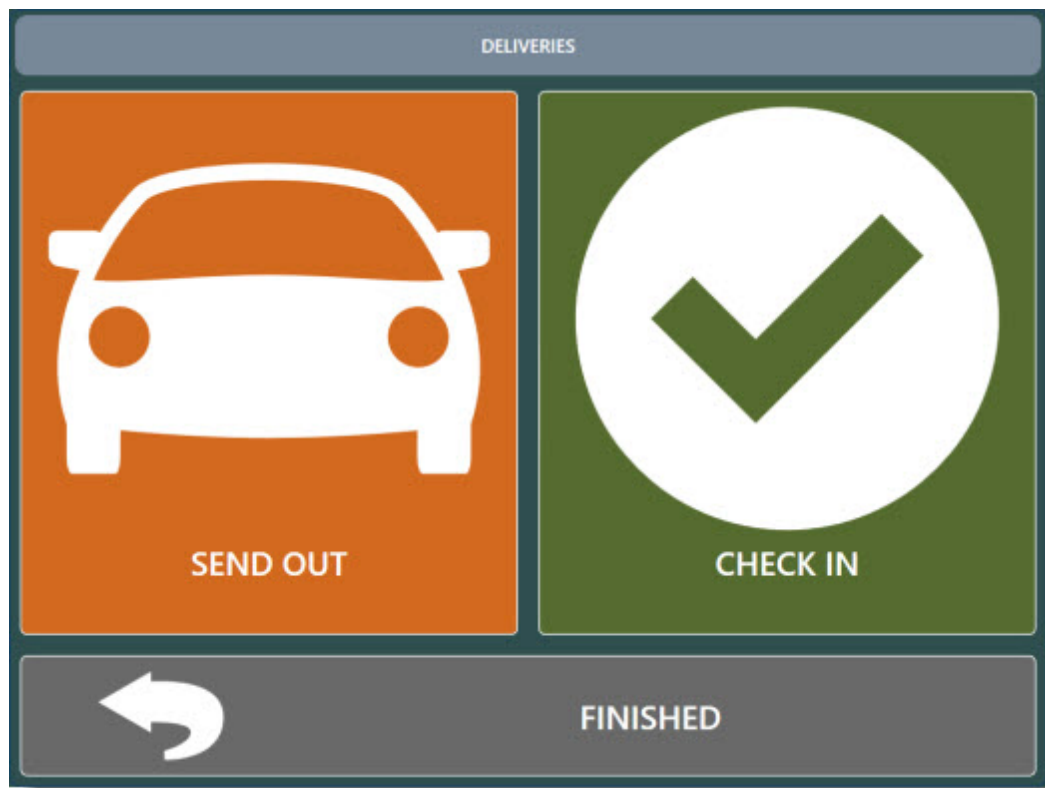
To begin a trip order, log in and press the **Deliveries** button under the **TRANSACTIONS** button group.



### Deliveries Button

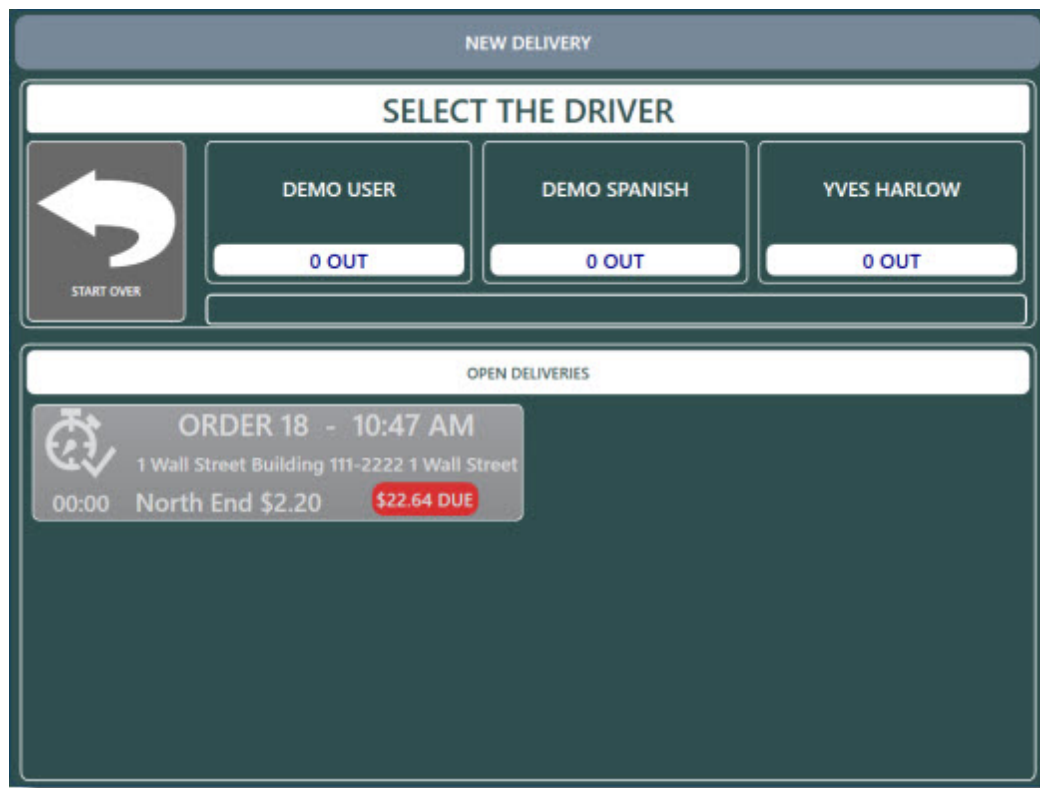
Press **SEND OUT** to view the drivers. Press **CHECK IN** to settle or check in deliveries that have been completed.





#### Deliveries Screen Driver Selection

Select a driver to show the open delivery orders. If the **Show Driver Delivery Count** setting is enabled, the driver's first name and last initial is followed by the current delivery count and the total delivery count for that driver (for the current business day). Drivers that are out on delivery appear in red; available drivers appear in blue.



Deliveries Screen Driver Selection

### Check-In

When a driver returns, the orders can be settled immediately or just checked-in to be settled later. Checked-in orders no longer appear on the order selection screen but are considered open since there is still a balance due. The **Check-In & Settle** button is used to settle each selected order's entire remaining balance with a single cash transaction (for each order).

In some cases it may be necessary to process a transaction or settle a order before the orders are checked in, including scenarios where:

- The order is settled with a non-cash transaction
- The order is settled with more than one payment type

In these scenarios the driver must **first** process the transaction(s) using the Settle screen and **then** return to the Deliveries screen to check-in the orders. Note that the balance due shown on the Check-In screen will reflect the payment already applied. If the balance due is zero, a payment type is not displayed.

Gratuities can be specified for each order by selecting the order and pressing the **EDIT SELECTED** button. Note that this function is available for cash transactions only, as non-cash gratuities are entering when processing the payment on the settle screen or when capturing a credit card transaction. If gratuities are not tracked, set **Driver Check In Edit Disable** to Yes so that the **EDIT SELECTED** button is hidden.



#### Specify the gratuity collected for a delivery order

The green **Check-In & Settle** button is controlled by the **AllowSettle** permission<sup>[698]</sup>. If this permission is set to No for the current user, a manager override is required to complete the check-in. Note that if mandatory time clock is not used and the current user is assigned multiple job types, the user's default job type determines the status of the **AllowSettle** permission.

When using the green **Check-In & Settle** button, the order is settled immediately and the driver must deposit funds into the drawer. The total is not included in the amount owed when calculating driver liabilities. If the driver holds the money until the end of the shift, the **Check-In Only** button should be used.

#### Driver Deposits

Drivers may periodically deposit cash into the drawer in order to reduce the amount of cash that they carry. The manager must accept the deposit and record it on the manager screen by pressing the **Deposits** button at the top followed by the **Driver Deposit** button. Press the **New Deposit/End Shift** button. Select the driver, enter the deposit amount and press the green **Continue** button to open the cash drawer.

Accepting a driver deposit does not automatically settle open delivery orders. Rather, a final deposit is used to settle open orders when the **End Shift** permission<sup>[669]</sup> is completed, as described below. Driver deposits are used to temporarily transfer cash to the drawer but must be converted to cash transactions to settle the driver's open delivery orders before the drawer is reset.

To simplify drawer count and eliminate discrepancies, the drivers should use the same POS station to deposit funds throughout the shift and the cash drawer should be reset only after the End Shift is performed, since the funds entered by the driver are used to settle the open delivery orders. In addition, running the End of Day will archive all driver deposits, regardless of whether the driver has made a final deposit. If the cash drawer is changed multiple times throughout the business day and drivers routinely use more than one drawer, deposits should not be used. Rather, the open delivery orders should be settled using the Delivery Check-In or order Settlement screen.

**Note:** Since **all deposits are converted to Cash transactions to settle open delivery orders when the End Shift is run**, all drivers deposits must be entered at the same Pos station and the End Shift should be run before the drawer is reset in order to maintain the correct drawer count. If a deposit is attempted at a different Pos station, a warning will sound and a message will appear at the lower right.

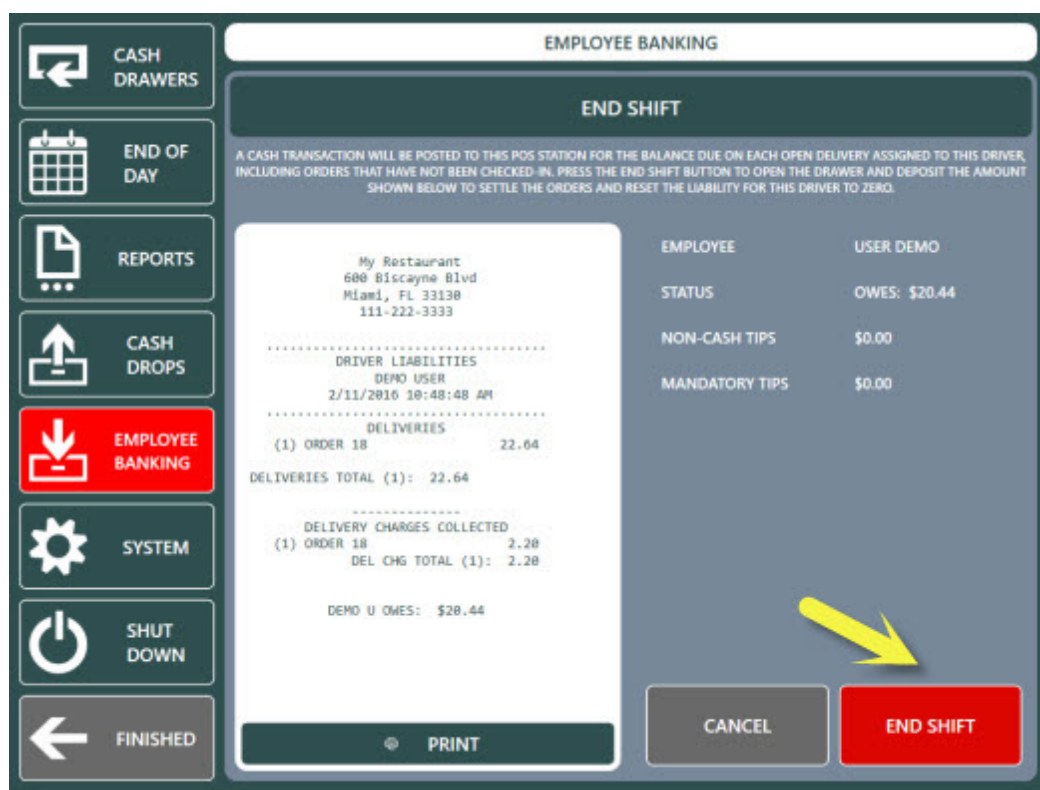
### Forced Deposits

Drivers can be prevented from taking additional delivery orders until a deposit is made on the manager screen after a sales threshold is reached. For example, you may want the driver to carry no more than \$200 at any given time. If the driver has reached this limit, a small alert will appear at the bottom right of the screen whenever the driver's name is selected on the Delivery Check-Out screen. To enable this feature, set the value of **Delivery Screen Force Deposit** to **Yes** and set the allowable amount by changing the value of the **Delivery Screen Force Deposit Amount** setting.

### End Shift

The final driver deposit for the current business day is used to settle all of the driver's open delivery orders with a separate cash transaction recorded for the remaining balance on each open delivery order. To perform a final driver deposit, log in as manager and navigate to **Manager > Deposits > Driver Deposit** and press the **New Deposit/End Shift** button. Select the driver and press the **End Driver Shift** button. Confirm that the driver has remitted the total shown on the screen and press the **Submit** button to open the cash drawer. The following actions are then completed:

- Any of the driver's delivery orders for the current business day that have not been checked-in are checked-in
- Any of the driver's delivery orders for the current business day that have not been settled are settled using a cash transaction
- The driver's previous deposits for the current business day are converted to cash transactions and no longer appear on the drawer reset report
- If the **Driver Report Deduct Non-Cash Gratuities** setting is set to **Yes**, a cash payout is entered at the local Pos station for the non-cash gratuities total
- If the **Driver Report Deduct Delivery Charges** setting is set to **Yes**, a cash payout is entered at the local Pos station for the delivery charges total
- All of the driver's deliveries for the current business day are archived



Driver End Shift

## 15.3 Driver Liability Report

The driver liability report is used to determine the cash owed by each driver at the end of the business day. This report can be customized to show the details of each delivery, transaction, driver deposit and gratuity or can be customized to show only totals for each driver (useful for reducing the size of the report when many drivers are working simultaneously).

### All Drivers

The driver liability report for **all drivers** is accessed by logging in with manager permissions, opening the manager screen and pressing the Reports button at the top center. Select the **Driver Liability** report to update the report viewer. If this report is not available, refer to the [End of Day Reports](#)<sup>649</sup> help topic for instructions on enabling this report. Note that this report is formatted to print to the local receipt printer and contains some abbreviations to reduce the amount of text and save paper.

### Individual Driver Report

The driver liability report for the currently logged in user is available on the **Time Clock** screen by pressing the **Driver Report** button. Note that this button is visible only when the currently logged in user has taken deliveries during the current business day. The driver is **not required to clock-in** in order to access the driver liability report on the Time Clock screen.

### Overview

The following information is used to determine each driver's liability:

- **order Details & Total:** The total of each order and the total for all orders
- **Transaction Details & Total:** The type and total for each transaction type and the sum of all transactions
- **Deposit Details & Total:** The pos station Id, Amount and time of each deposit

- **Non-Cash Gratuities:** Gratuities collected from credit card transactions, gift card transactions and house account transactions

```

.....
-----
DONOVAN, CLYDE
-----
*
DELIVERIES
(1) TICKET 1                2.20
(2) TICKET 2                4.90
-----
DELIVERIES TOTAL (2) :    7.10

*
DEPOSITS
(1) CASH DEP T1 23:40      200.00
-----
DEPOSITS TOTAL (1) :    200.00

```

**Driver Liability Report Showing Itemized Orders**

Driver deposits are shown with the pos station id followed by the time and amount, as shown below.

```

.....
-----
DONOVAN, CLYDE
-----
*
DELIVERIES
(1) TICKET 1                2.20
(2) TICKET 2                4.90
-----
DELIVERIES TOTAL (2) :    7.10

*
DEPOSITS
(1) CASH DEP T1 23:40      200.00
-----
DEPOSITS TOTAL (1) :    200.00

```

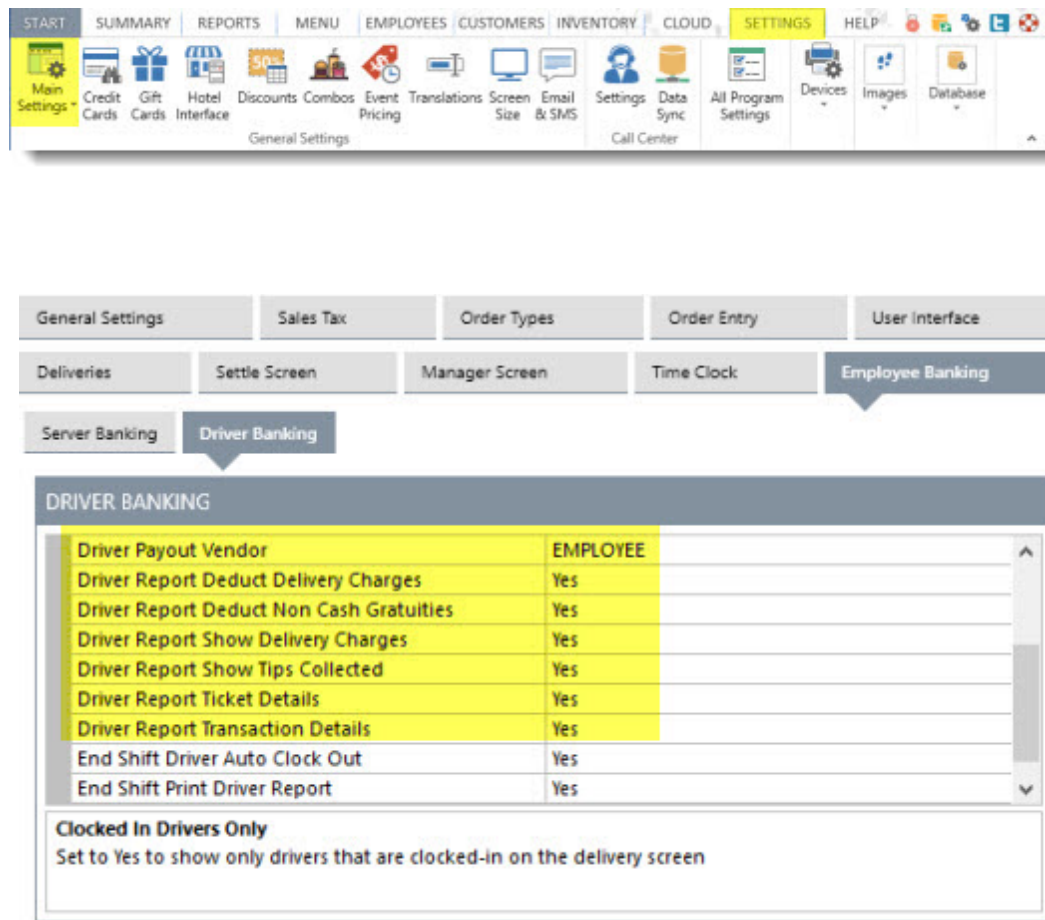
**Driver Liability Report Showing Itemized Driver Deposits**

In addition, the following are available as separate report sections:

- **Delivery Charges:** Delivery charges collected for each delivery zone
- **Cash & Non-Cash Gratuities Detail & Total:** The (itemized) declared cash and calculated non-cash gratuities and totals of each for all orders

The last 2 report sections, **Delivery Charges** and **Cash & Non-Cash Gratuities**, can be suppressed if not required by setting the values of **Driver Report Show Delivery Charges** and **Driver Report Show Tips Collected** to **No**.

To customize the report, navigate to Back Office/Settings/Main Settings/Deliveries and adjust the settings that contain the **Driver Report** prefix, as shown below.



### Driver Liability Calculation

The total liability for each driver is determined for a given business day, regardless of cash drawer changes or at which pos station a order is settled. Since orders can be settled by multiple transactions, i.e. 1/2 cash and 1/2 credit, the driver liability report lists transactions separately from delivery orders. The total liability is determined as follows:

$$\text{Delivery orders Total} - (\text{Transactions Total} + \text{Deposits Total} + \text{Non-Cash Gratuities Total} + \text{Delivery Charges})$$

where

- **Delivery orders Total** is the sum of all orders the driver has taken during the current business day (Subtotal + Tax - Discount + Mandatory Gratuity + Delivery Charge)
- **Transactions Total** is the sum of all transactions processed against those orders during the current business day
- **Deposits Total** is the total deposits the driver has completed during the current business day
- **Non-Cash Gratuities** is the total of all non-cash gratuities for the current business day. This parameter can be disabled if the driver's non-cash gratuities should not be used to offset liabilities by setting the value for **Driver Report Deduct Non Cash Gratuities** to **No**.

- **Delivery Charges** is the total delivery charges collected by the driver for the current business day. This parameter can be disabled if the driver does not keep the delivery charges (or the delivery charges should not be used to offset liabilities) by setting the value for **Driver Report Deduct Delivery Charges** to **No**.

If Delivery orders Total is less than the total of the other items, the total will be prefixed by the word **OVER-PAYMENT** and a plus sign, otherwise the total will be prefixed by the words **TOTAL OWED**, as shown below.

```

      *
      DEPOSITS
(1) CASH DEP T1 23:40      200.00
-----
      DEPOSITS TOTAL (1): 200.00

      *
      DELIVERY CHARGES COLLECTED
(1) TCKT 1                  2.20
(2) TCKT 2                  2.20
-----
      DEL CHG TOTAL (2):  4.40

```

```

! CLYDE D. OVER-PAYED:  +$197.30

```

#### Driver Liability Report Over-Payment Alert

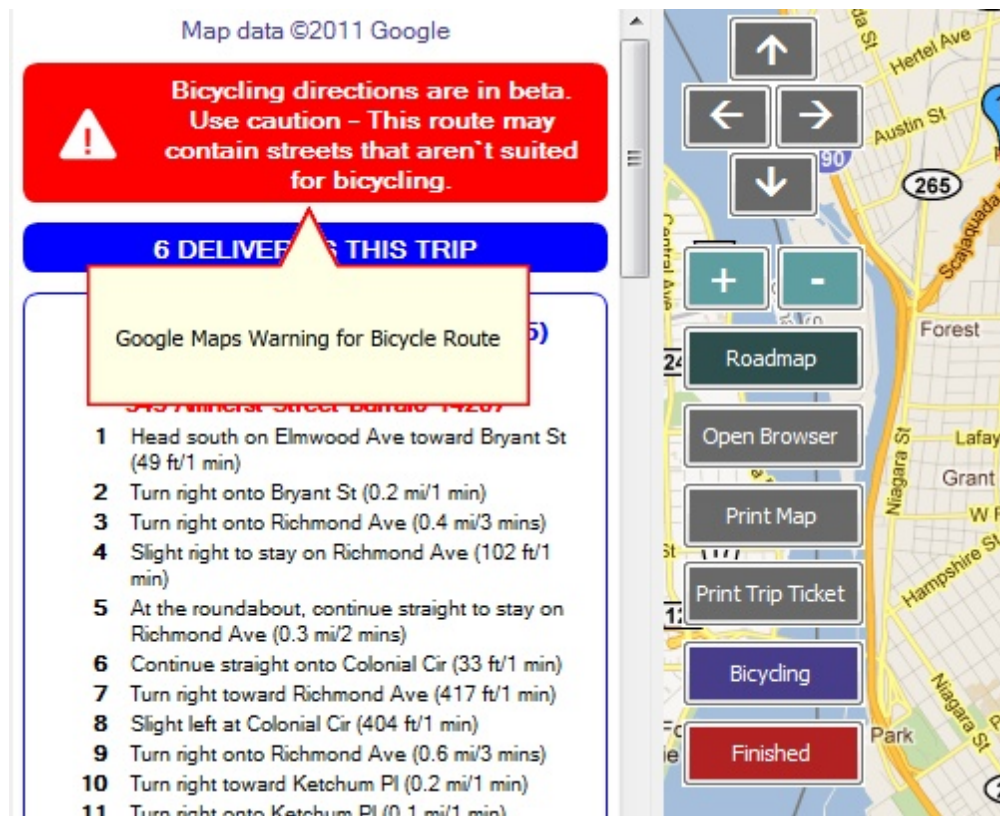
\*Only drivers with open deliveries for the current business day are shown on the user selection list. Drivers with no open deliveries cannot remit deposits or use the End Shift function. An open delivery is a delivery order that has not been settled. Checked-in orders are considered open.

## 15.4 Google Maps

The AmigoPOS interface to Google Maps will calculate the quickest route for up to 8 destinations on a single delivery. The settings shown below are configured at each pos station. Note that this interface is subject to Google Maps terms of use.

The Google maps interface will display the quickest (not necessarily shortest) route for multiple destinations based on the traveling salesman algorithm. AmigoPOS will calculate the estimated arrival time for each stop on the delivery as well as the estimated return time for the driver. For metropolitan areas where deliveries are taken by walking or bicycling, the quickest route for those travel modes can be calculated instead. Note that the route may be different for walking than driving or bicycling and that Google displays a warning that sidewalk or bike path information may not be available for the route shown.

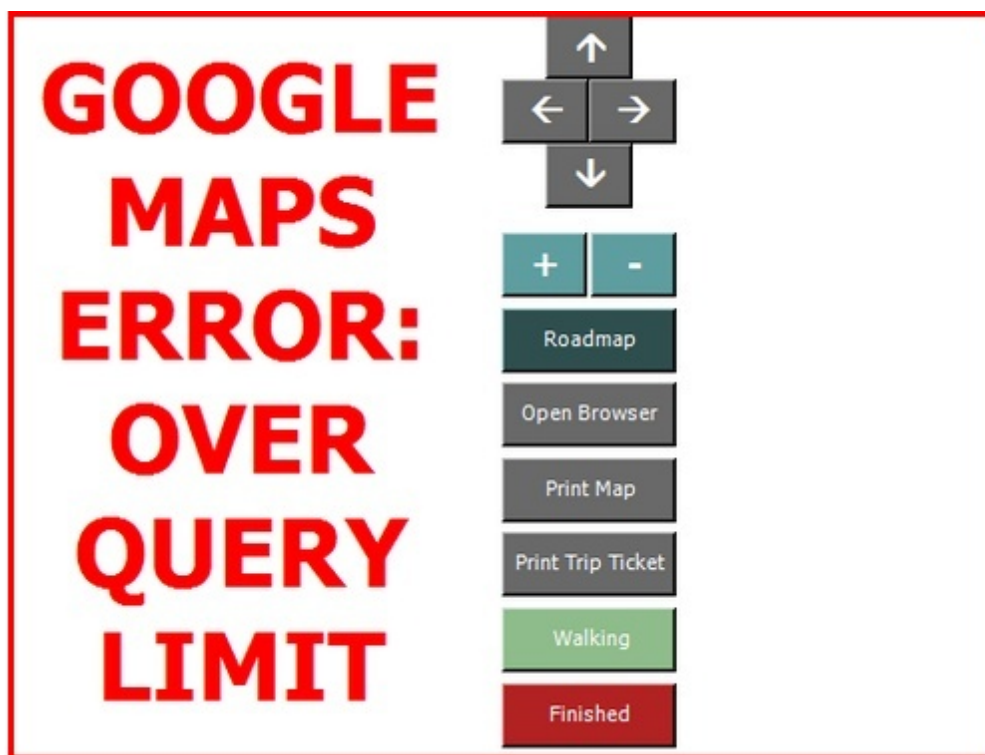




Google Maps Warning

### Usage Limits

Google Maps theoretically offers 1000 queries per day from a single IP address. Although this may seem sufficient for most users, rate limits also apply (i.e. queries per hour/minute/second) so that Google Maps may prevent you from generating directions and maps for multiple hours or longer. In addition, if your ISP pools IP addresses (you are not assigned your own IP address), the usage error may appear much more frequently.



Google Query Limit Error

### Settings

The map interface is enabled in **Back Office>Settings>Main Settings>Deliveries>Mapping** by selecting **Google Maps** from the drop-down list. All settings are set independently at each station.

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
General Settings	Phone Number Format	Delivery Zones	Mapping	

ADDRESS MAPPING	
<b>General Settings</b>	
*Map Interface	Google Maps
*Display Customer Distance	No
*Print Directions	No
*Delivery Destination Estimate	5 Minutes
<b>Google Maps</b>	
*Default TravelMode	driving
*Units	imperial
*DistanceLimit	5
*Default Zoom Level	13
*Start Address Coordinates	40.750556, -73.993611 <span>Lookup</span>
*Location Suffix	
<b>*Map Interface</b> Select the map interface method to use at this pos station	

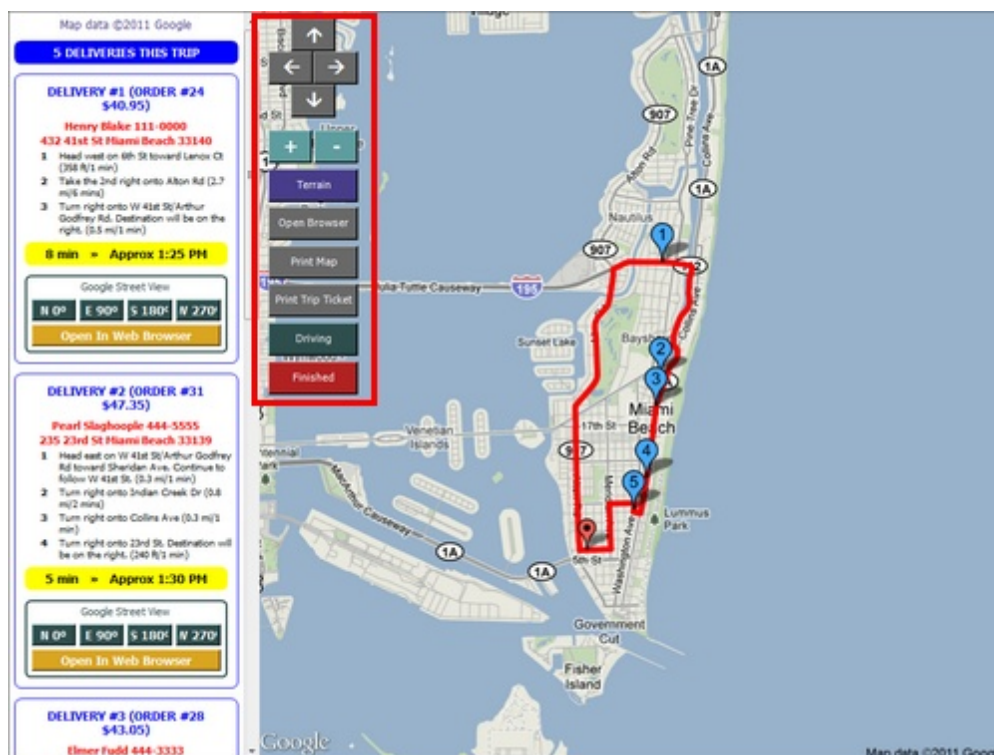
- **Map Interface:** Select the map interface method to use at this pos station. Only Google Maps is currently supported. Check back soon for Bing Maps integration.
- **Display Customer Distance:** Set to Yes to display the distance from the start address to the customer location on the customer information screen
- **Print Directions:** Set to Yes to print turn-by-turn directions under each trip ticket order summary
- **Delivery Destination Estimate:** AmigoPOS will estimate the trip time by adding the route time from Google Maps to the estimate of time spent at each customer location, generally 3-7 minutes.
- **Default Travel Mode:** Select the mode that the delivery person will use to make the deliveries so that Google Maps can calculate the best route.
- **Units:** Select the units to use at this pos station when displaying the distance to the customer address. Select Metric to display kilometers and meters or Imperial to display miles and feet.
- **Default Zoom Level:** Google Maps can zoom from 0 to 25+, where 0 displays the entire planet and 25 displays close-ups of the tops of tall buildings. This value should be set to between 12 and 15 for most areas.
- **Start Address Coordinates:** Enter the latitude and longitude help Google Maps identify your location. Enter the latitude first and longitude second with a comma between the values.
- **Location Suffix:** Some countries may require additional information to display maps properly because the city name may already exist in the United States, i.e. searching for Toledo will display a map of the city in Ohio, not the city in Spain. Enter the country, province or region name (or any other value) that will help Google Maps identify the customer address.
- **Print Trip Ticket by Default:** If this setting is set to No, the trip ticket can be printed by pressing the **Print Trip Ticket** button on the maps screen

### Usage

The delivery screen functions identically whether or not mapping is used, with the exception that press the CHECK-OUT button at the bottom will now open the Google Maps screen. The trip ticket will print automatically if the **Print Trip Ticket by Default** setting is enabled. The map screen must be displayed after the trip ticket is created, as per Google Maps terms of service.

Options to further customize the map include:

- Move North, South, East, West
- Zoom In/Out
- View Terrain/Roadmap
- Open map in browser at Google Maps
- Print map to full-size printer
- Reprint trip ticket with directions
- Change travel mode



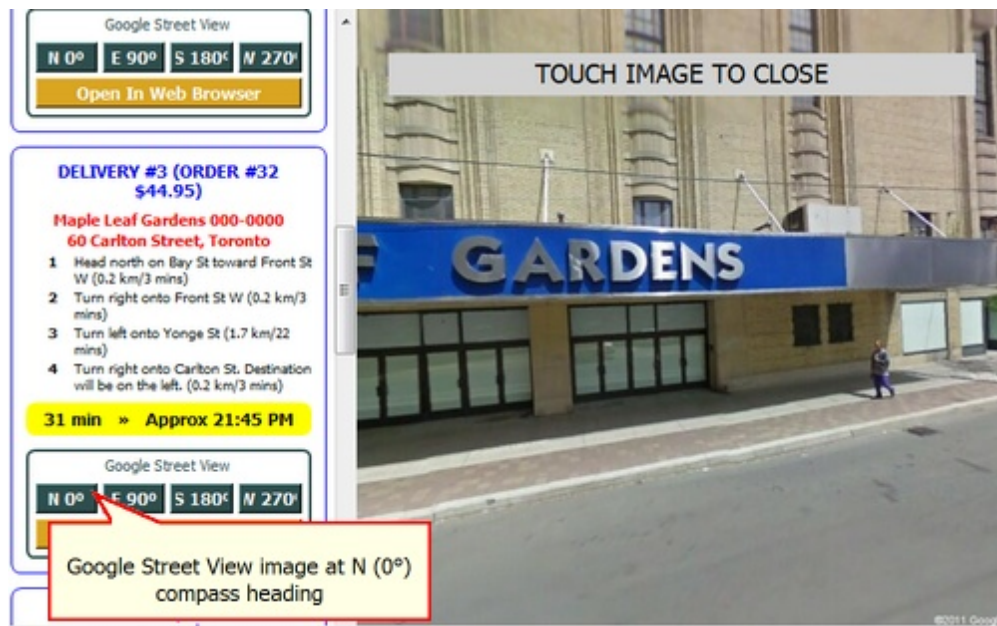
Google Map Options (Terrain Map Type)

The map can be printed to a full size printer. The map will print in landscape mode to the **default printer** on the local workstation. The receipt printer should not be set as the default printer, as the paper is too narrow to print a map.

The map location can also be opened in the default web browser if additional detail is required. The map is centered on the restaurant's coordinated but the delivery route is not displayed in the browser. Each customer location can similarly be opened in the default web browser by clicking the yellow button at the bottom of each customer's directions.

### Google Street View

Up to 4 images of the customer location can be displayed if available from Google. Images may not be available for many suburban, rural, or pedestrian-only areas. Select the compass heading to view an image on the right side of the screen. Touch anywhere on the image to return to the map.



Google Street View

### Errors

If AmigoPOS cannot connect to the internet (or to google.com) the screen will remain white or display the last map that was generated by Google Maps.

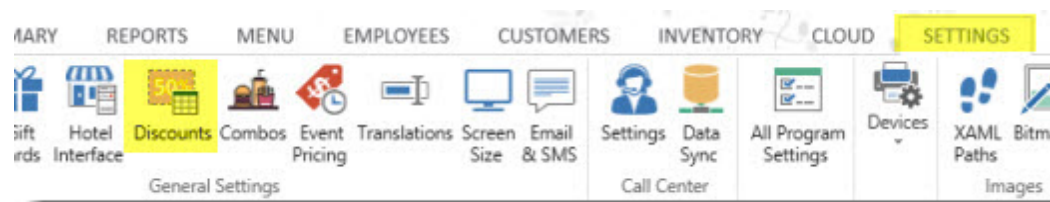
Part 16

# Discounts

## 16 Discounts

### 16.1 Overview

Discounts are defined as price rules that reduce the price of any single menu item, menu category, or combination of menu items, when user-defined conditions are met. In contrast with [regular menu special pricing](#)<sup>[831]</sup>, [bar menu special pricing](#)<sup>[870]</sup> and [event pricing](#)<sup>[1094]</sup> which automatically change the item price as it is added to the order, discounts do not automatically change the item price and are listed as separate lines on the customer receipt.



AmigoPOS 8 includes the user a comprehensive array of options to define rules-based discounts based on individual or a combination menu items or entire menu item categories. In addition, multiple menu items may be assigned to a discount for "Combo" type discounts, where the customer is required to purchase multiple items to receive a discount.

The discounts dialog window is located in Back Office/Settings/Discounts. All discount definitions and corresponding menu item assignments are managed on this screen. Review the following introductory text before reading the examples and entering new discounts. This article contains the following topics:

- [Entering a New Discount](#)<sup>[680]</sup>
- [Menu Item/Category Assignments](#)<sup>[682]</sup>

Only one discount can be applied to a single menu order item. The first discount entered will always take precedence, regardless of value, and automatic discounts are always calculated first.

#### Entering a new discount

**DISCOUNT SETTINGS**

Add a new discount X +

Discount name contains X

**\$1 OFF BLT CLUB**

\$1 Off Top Shelf Drink

\$1 Off Wings & Draft

\$4 Off Lg Ch+Pep

\$5 Off Takeout Over \$20

10% Off BLT Club

10% Off Dine-In Over \$20

10% Off Seafood Entrée

20% Off Lg Ch+Pep

**Main Settings** Item Assignments

General Settings

Enabled	Yes
Automatic	No
Discount Name	\$1 OFF BLT CLUB
Print Text	\$1 OFF BLT CLUB
Button Position	2
Calculation	Fixed
Amount	1
Menu Item Assignment	Yes
Order Minimum	0
Order Type	All Order Types
Items Per Order	3

**Enabled**

Select No to disable the selected discount

Click the Add New button, enter a friendly name for the discount and click OK to add a new discount. Click OK to load the new discount definition in the editor. The following fields are available:

- **Enabled:** Set to Yes to make this discount available on the order entry screen
- **Automatic:** Select Yes if this discount should be applied when items on the order match the specified criterion.
  - Automatic discounts will be loaded each time an order is started and no user action is required.
  - Automatic discounts are only listed once per order and cannot be duplicated on the same order.
  - Automatic discounts can be removed from an order by pressing the order entry screen Discounts button, but the automatic discount will be applied again if the order is recalled.
  - Automatic discounts are applied regardless of the current user's [permissions](#)<sup>698</sup>; users with job types job types that have the **Allow Discounts** permission set to No will not be able to access the discounts list on the order entry screen without a manager override but the discount will still be applied automatically.
- **Discount Name:** Enter a short name to appear on the discount button
- **Print Text:** Enter a short name to print on the customer receipt
- **Button Position:** Specify the position for this discount to appear on the list
- **Calculation:** Specify whether the discount amount is a fixed amount or calculated based on percentage (of the order subtotal or menu item price)
- **Amount:** Enter the amount or percentage to deduct. Use a decimal for percentage amounts; i.e. .5 = 50% off
- **Menu Item Assignment:** Set to Yes if this discount is applied only to specific menu items or categories
- **Exclude Bar Items:** Set to Yes to exclude the bar menu subtotal when calculating the percentage discount (available only for percentage by order discounts)
- **Require Pizza Size & Style:** Set to Yes if both the pizza size and style must match to apply this discount
- **Order Minimum:** Enter the minimum total order amount required before this discount can be applied
- **Order Type:** Specify whether this discount can be used with all order types or a single order type
- **Items Per Order:** Enter the maximum number of items that this discount can be applied to a single order. For example, BUY 1 GET 1 FREE will be applied twice if this value is set to 4 and the order contains 4 matching items.
- **Allow Other Discounts:** Select Yes if this discount can be applied to an order that already has other discounts applied
- **Start Date:** Enter or select the date that this discount becomes active (mm/dd/yyyy). If this discount never expires, enter the same value for both the start and end dates.
- **End Date:** Enter or select the date that this discount expires (mm/dd/yyyy). If this discount never expires, enter the same value for both the start and end dates.
- **Start Time:** Enter the time (in 24-hour format) that this discount becomes active. If this discount is always active, enter the same value for both the start and end times.



- **End Time:** Enter the time (in 24-hour format) that this discount becomes inactive. If this discount is always active, enter the same value for both the start and end times.
- **Sunday - Saturday:** Select Yes if this discount is available on the specified day of week

### Menu Item\Category Assignments

If the discount is to be applied to a specific menu category or item, set the Menu Item Assignment field to Yes to enable the 2nd tab. Click the Item\Category Discount tab and select **Add New** from the drop-down list. Select the menu type and item type to display an alphabetized list of available items in the **Item** field. For example, to apply a discount to the Burgers category, select Regular\Retail menu type and Menu Categories item type to display the list of menu categories. Click **Finished** to close the screen. Note that any existing discount assignment can be edited by double-clicking on the discount assignments grid.

Main Settings		Item Assignments					
		Menu Type	Item Type	Item	Qty	Required	
		Regular Menu	Menu Category	WINGS	1	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
		Bar Menu	Menu Category	DRAFT BEER	1	<input checked="" type="checkbox"/>	<input type="button" value="X"/>

The following fields are available on the discount assignments editor:

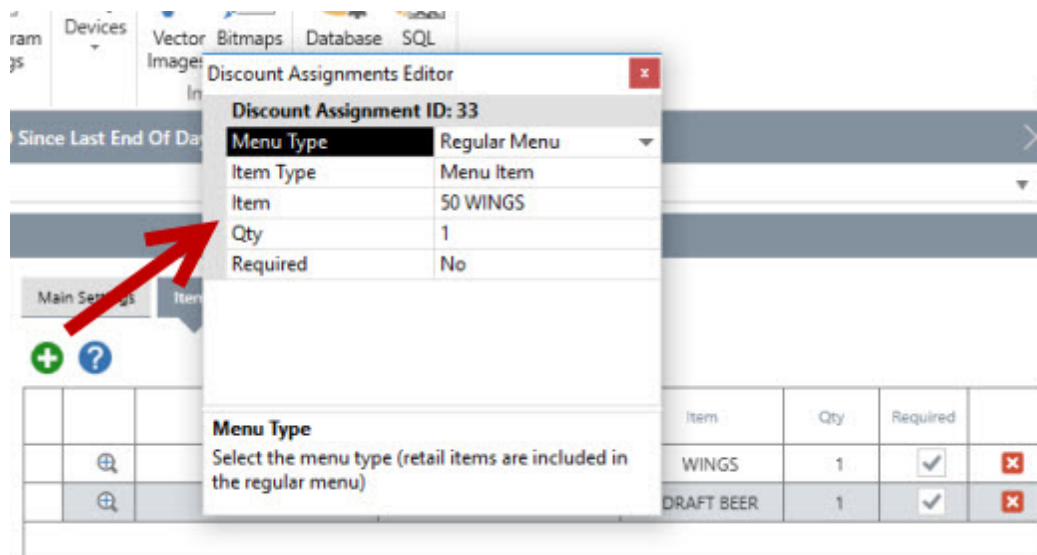
**Menu Type:** Specify whether the assignment is for the regular, bar or pizza menu

**Item Type:** Specify whether it is a menu item or menu category (or pizza size\style)

**Item:** The alphabetical list of items shown in this field is determined by the selections in the preceding fields

**Qty:** Enter the minimum number of this item that must be added to the order before this discount can be applied

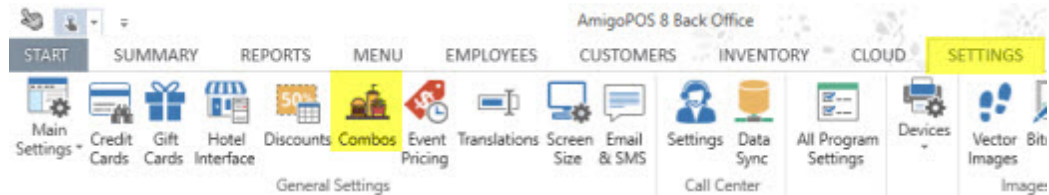
**Required:** Select Yes if this item must be added to the order; select False if there are other choices available for this discount



## 16.2 Combo Discounts

Combo discounts are used where the customer selects items from multiple menu categories to receive a discount. For example, in many fast food restaurants a typical combo may consist of a hamburger, french fries and soda for a fixed amount. The combo discount is the difference in cost of the combined prices of the individual items and the price assigned to the combo. Combo discounts are currently available only for regular [menu categories](#). <sup>826</sup>

In the following example (included in the demonstration database), a combo named **COMBO 1 DISCOUNT** has a fixed price of \$5.00 and the customer must select an item from 3 categories, BURGERS, DRINKS and APPETIZERS.



The following fields are available for the combo discount:

- **Description:** the name of the combo discount as it should appear on screen and on the customer receipt
- **Price:** the combo price
- **Expires:** enter the date that the combo expires
- **Time On/Off:** specify a time range where the combo is valid. Set both to the same value if the combo discount is always available
- **Category 1-5:** Select 2 or more regular menu categories

COMBO DEFINITIONS						
	DESCRIPTION	PRICE	EXPIRES	TIME ON	TIME OFF	
+	Click here to add a new row					
	COMBO 1 DISCOUNT	\$5.00	2019-01-01	12:00 PM	12:00 PM	

Select the top row to define a new combo discount. Enter the name of the combo discount as it should appear on screen and on the customer receipt, the fixed price of the combo and select the menu categories from the drop-down lists. In the order shown below, the customer has ordered 2 items from each category and the combo discount is applied twice. Note that the combo discounts have different amounts in order to charge the fixed \$5.00 combo price.



The customer receipt prints the combo description with the combo discount at the bottom.



Individual menu items can be excluded from combos by checking the **Exclude From Combos** field in the menu item editor or menu items grid.

**MENU ITEMS**

APPETIZERS

Add a new menu item

Item name contains

FRENCH FRIES (1)

ONION RINGS (2)

**MAIN SETTINGS**

**Pricing**

Price	1.75
Tax Rate	9% [ID:1/Sales Tax]
Revenue Center	FOOD
SKU	0
Retail Inventory	Add Inventory Item
PLU	0
Sold By Weight	<input type="checkbox"/>
Price By Weight Multiplier	1
Price By Weight Suffix	
Container Charge	0
Exclude From Special Pricing	<input type="checkbox"/>
Exclude From Event Pricing	<input type="checkbox"/>
Exclude From Discounts	<input type="checkbox"/>
Exclude From Combos	<input type="checkbox"/>
Deposit	0

**Online Ordering**

**Prep Printers**

**Exclude From Combos**  
Set to Yes to exclude this menu item when calculating combo discounts

**MENU ITEMS LIST**

REGULAR MENU

REFRESH

PRICE COLUMNS

PRINTER COLUMNS

AVAILABILITY COLUMNS

APPEARANCE COLUMNS

ID	ITEM NAME	EXCLUDE FROM DISCOUNTS	EXCLUDE FROM COMBOS	LOYALTY POINT VALUE
Click here to add a new row				
APPETIZERS - 2 Menu Items				
798	FRENCH FRIES	<input type="checkbox"/>	<input type="checkbox"/>	0
799	ONION RINGS	<input type="checkbox"/>	<input type="checkbox"/>	0
BREAKFAST - 11 Menu Items				
286	BACON & CHEESE OMEL	<input type="checkbox"/>	<input type="checkbox"/>	0

## 16.3 Multi-Part Discount Example

A common scenario is to offer a discount when a combination of menu items are purchased. For example, the following procedure is used to create an automatic discount that deducts \$1 whenever an item from the Wings category and an item from the Draft Beer category is purchased. In addition, this discount will be restricted to a maximum of \$5 per order.

1. Open **Back Office>Settings>Discounts** and click **Add New** at the top left
2. Enter a short name, i.e. \$1 Off Wings & Draft Beer, click OK and set the following values:
  - Automatic = Yes
  - Amount = 1
  - Menu Item Assignment = Yes
  - Items Per Order = 5
  - Set the Start Date = End Date

**DISCOUNT SETTINGS**

Add a new discount X + Main Settings Item Assignments

Discount name contains X

\$1 OFF BLT CLUB

\$1 Off Top Shelf Drink

**\$1 Off Wings & Draft**

\$4 Off Lg Ch+Pep

\$5 Off Takeout Over \$20

10% Off BLT Club

10% Off Dine-In Over \$20

10% Off Seafood Entrée

20% Off Lg Ch+Pep

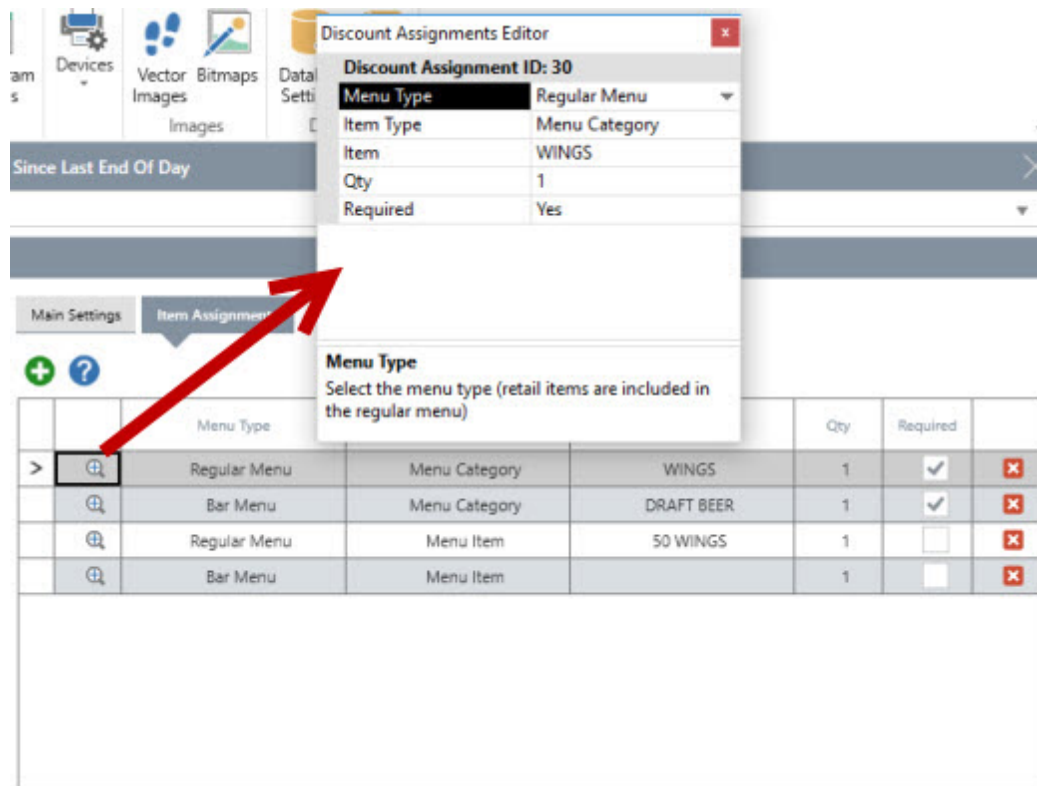
**General Settings**

Enabled	Yes
Automatic	No
Discount Name	\$1 Off Wings & Draft
Print Text	\$1 Off Wings & Draft Beer
Button Position	1
Calculation	Fixed
Amount	1
Menu Item Assignment	Yes
Order Minimum	0
Order Type	All Order Types
Items Per Order	5
Allow Other Discounts	Yes

**Enabled**  
Select No to disable the selected discount

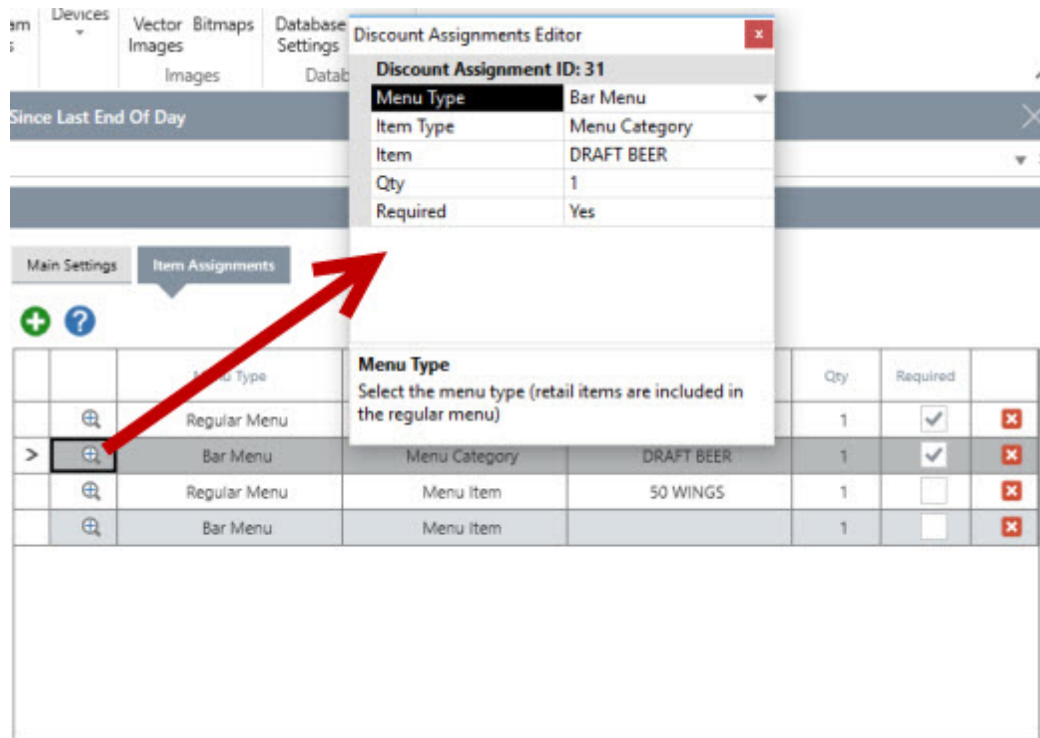
#### General Settings

3. Click the Item/Category Assignments tab and select Add New from the drop-down list to add the Wings assignment and set the following values:
  - Menu Type = Regular/Retail
  - Item Type = Menu Category
  - Item = Wings
  - Qty = 1
  - Required = Yes



#### Regular Menu Category Assignment

4. Click Add New from the drop-down list again to add the Draft Beer assignment and set the following values:
  - Menu Type = Bar
  - Item Type = Menu Category
  - Item = Draft Beer
  - Qty = 1
  - Required = Yes



Bar Menu Category Assignment

Click the Update Database button at the top left so that AmigoPOS does not have to be restarted to test the discount on the order entry screen. Since the discount is set to Automatic, no user action is required. Add one item from the Wings regular menu category and 1 item from the Draft Beer bar menu category and verify that \$1 appears in the discount box and that the subtotal has decreased. Change the quantity of both the chicken wings and draft beer to 15 and notice that the discount will not surpass \$5, since the Items Per Order is set to 5.

## 16.4 Line Item Discounts

Line item discounts are fixed or percentage discounts that are applied to the selected order item only. Line item discounts differ from regular discounts in that the discount is applied to the menu item price before the sales tax is calculated (except when using VAT tax) and there are no rules that limit the discount based on day of week, time of day or menu item type.

Line item discount settings are located in **Back Office>Settings>Main Settings>Order Entry>Order Entry Screen>Discounts**:

- **Line Item Discount Maximum Percentage:** Whole number maximum value of a percentage line item discount. This setting does not apply to fixed line item discounts.
- **Line Item Discount Include Modifiers:** Set to Yes to include modifiers when calculating percentage line item discounts or the maximum allowed fixed line item discount.



**Main Settings** x

Deliveries | Settle Screen | Manager Screen | Time Clock | Employee Banking

General Settings | Sales Tax | Order Types | **Order Entry** | User Interface

**Order Entry Screen** | Retail | Removed Items | Void Reasons | Age Verification

**ORDER ENTRY SCREEN SETTINGS**

- Discounts**
  - Manual Discount Text: DISCOUNT
  - Line Item Discount Maximum Percentage: 100
  - Discount Order Minimum Based On Subtotal Only: Yes
  - Line Item Discount Include Modifiers: Yes
- Regular Menu
- Bar Tabs
- Loyalty Cards
- Order Entry Buttons

**Line Item Discount Maximum Percentage**  
Whole number maximum value of a percentage line item discount. This setting does not apply to fixed line item discounts.

The line item discount is printed immediately below the order item and above the modifiers on the customer receipt. The text can be customized in **Back Office > Settings > Peripherals > Receipt printer > Custom Text**. Note that the text is prefixed with the value and percent symbol for percentage line item discounts.

```

-- GUEST 2 --

SMALL CH & PEP                8.50
50% DISCOUNT                -7.75
GREEN PEPPER                  2.00
HAM                           2.50
HAMBURGER                     2.50
ROOT BEER                     1.25

```

**Customer Receipt**



DEVICE SETTINGS

Select the device:

Receipt Printer

Additional Info:

Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode

Receipt Printer

Test Receipt

Custom Text	
Receipt Text Loyalty Card Summary Bonus Accrued	ACCRUED
Receipt Text Loyalty Card Summary Bonus Redeemed	REDEEMED
Receipt Text Loyalty Card Summary Bonus Remaining	REMAINING
Receipt Text Loyalty Card Summary Current Order	THIS PURCHASE
Receipt Text Loyalty Card Summary Top	CARD #([LOYALTYCARDTRACK]) REWARDS TO
Receipt Number	RECEIPT#
Delivery Charge Text	DELIVERY
Print Guest Prefix	-- GUEST
Print Guest Suffix	--
Age Verification	AGE VERIFICATION
Amount Tendered	AMOUNT TENDERED
Bottom Line 1	
Bottom Line 2	OPEN 24 HOURS
Bottom Line 3	THANK YOU! COME AGAIN
Bottom Line 4	
Bottom Line 5	
Change Due	CHANGE DUE
Comp	COMP
Customer Copy	CUSTOMER COPY
Customer Information	CUSTOMER INFORMATION
Discount	DISCOUNT

Discount

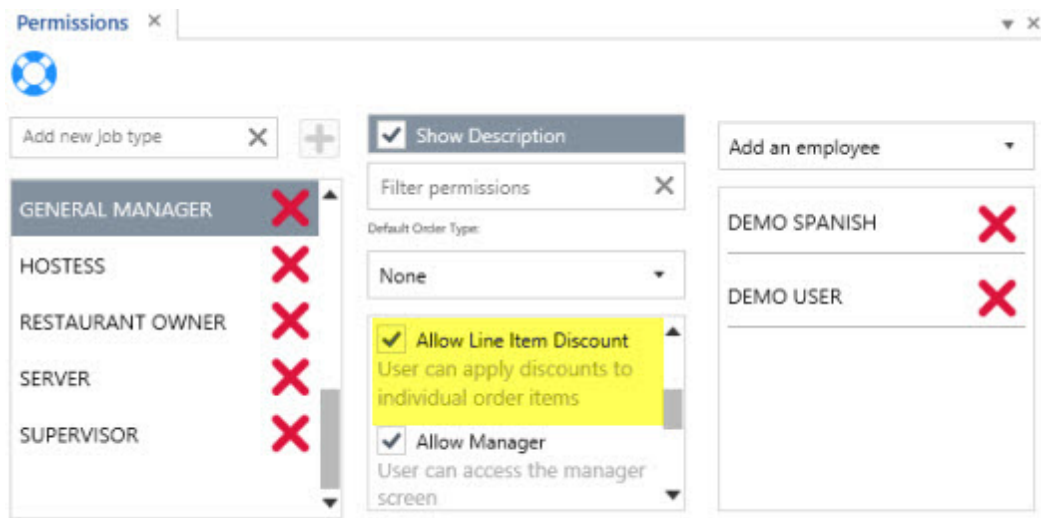
Text to print on customer receipt for items with a line item discount.

To apply a line item discount, select any item on the order and press LINE ITEM DISCOUNT at the bottom right.



Line Item Discount

The button is disabled if the logged in user's job type does not have the Allow Line Item Discount [permission](#) <sup>698</sup> enabled.

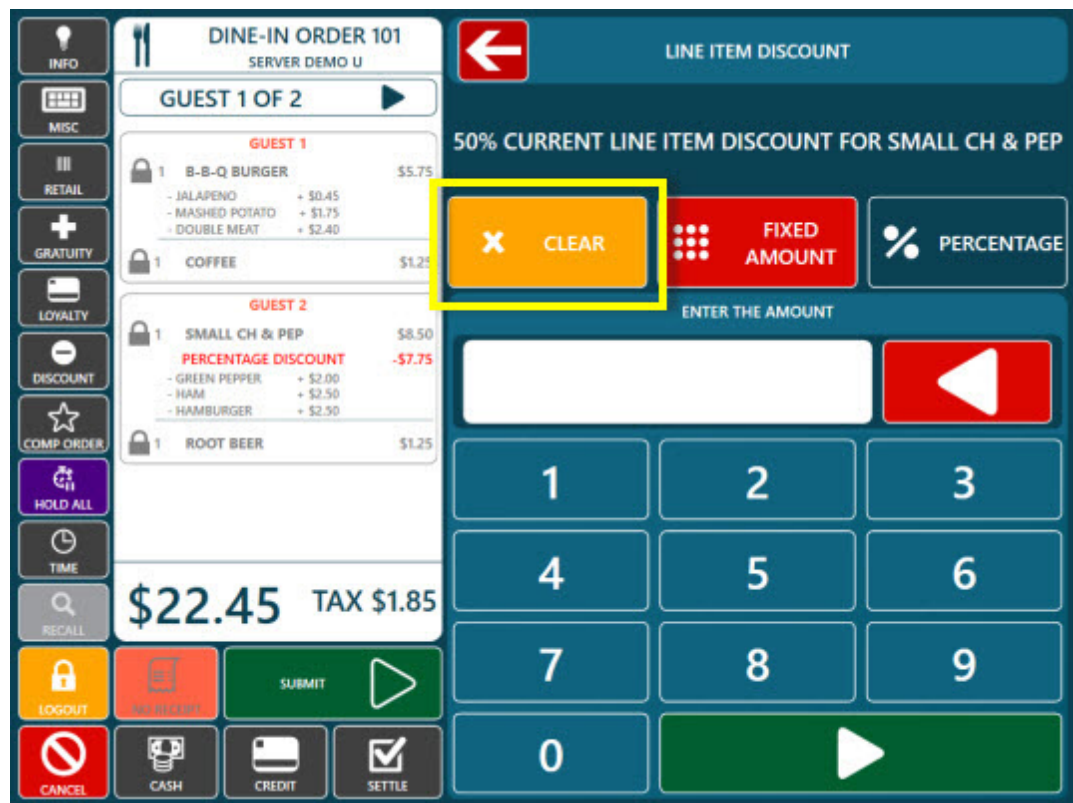


Select the discount type and enter the amount. The fixed discount amount cannot exceed the price of the order item and the percentage discount cannot exceed 100%. In the example below, the user attempts to enter a \$5.00 fixed discount and the value is automatically decreased to \$3.95, the maximum value allowed. The percentage discount is automatically recalculated if the order item quantity is changed.



**Fixed Line Item Discount Maximum Amount**

If a mistake is made, select the order item again to enter the correct discount or remove the line item discount with the CLEAR button.



#### Remove Line Item Discount

A mini report listing each line item discount is available on the manager screen and in **Back Office>Reports>Mini Reports**. The report can be set to print automatically when the end of day is run in **Back Office>Settings>Main Settings>Manager Screen>End of Day Reports**.

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
Revenue Centers	User Interface	External Applications		
Drawer Reset	End Of Day	End of Day Reports	Special Events	

END OF DAY REPORTS				
	REPORT NAME	BUTTON POSITION	AUTO PRINT	HIDE BUTTON
	MANDATORY GRATUITIES	16	<input type="checkbox"/>	<input type="checkbox"/>
	COMPS BY ITEM TYPE	17	<input type="checkbox"/>	<input type="checkbox"/>
	LINE ITEM DISCOUNTS	18	<input type="checkbox"/>	<input type="checkbox"/>
	PRICE CHANGES	19	<input type="checkbox"/>	<input type="checkbox"/>

CASH  
DRAWERS

END OF  
DAY

REPORTS

CASH  
DROPS

EMPLOYEE  
BANKING

SYSTEM

SHUT  
DOWN

FINISHED

MINI REPORTS

My Restaurant  
600 Biscayne Blvd  
Miami, FL 33130  
111-222-3333

LINE ITEM DISCOUNTS  
CURRENT BUSINESS DAY  
3/5/2015 3:50:50 AM

ORDER# 1	COUNTER
SERVER:	DEMO U
TYPE:	FIXED
AMOUNT:	\$0.50
ORDER# 2	COUNTER
SERVER:	DEMO U
TYPE:	PERCENT
VALUE:	100%
AMOUNT:	\$1.25
REPORT TOTAL \$1.75	

PRINT

BAR ITEM SALES  
REPORT

CREDIT CARD  
TOTALS

CREDIT CARD  
TIPS REPORT

CREDIT CARD  
TRANSACTIONS

INVENTORY  
USAGE

ITEM SALES  
REPORT

LOW INVENTORY  
(ESTIMATE)

NON CASH TIPS  
DETAIL

NON CASH TIPS  
REPORT

OPEN PREAUTH  
REPORT

ORDER VOIDS

TIME SHEET  
ACTIVITY

MANDATORY  
GRATUITIES

COMPS BY ITEM  
TYPE

LINE ITEM  
DISCOUNTS

Manager Screen Reports

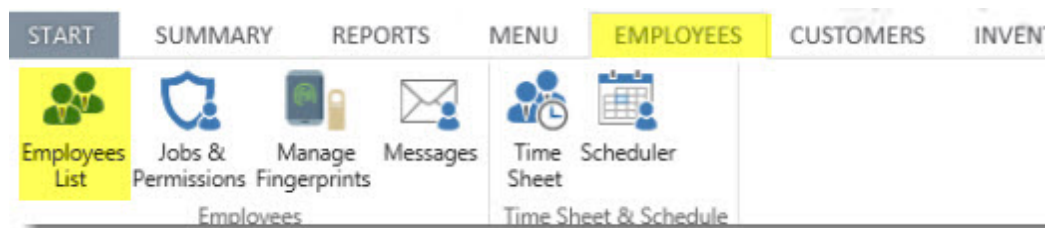
Part 17

# Employees

## 17 Employees

### 17.1 Employee Management

AmigoPOS groups employees by [Job](#)<sup>[698]</sup> type, as defined on the **Jobs & Permissions** screen. All employees are assigned a default permission and may have [multiple permissions](#)<sup>[700]</sup> assigned. Mandatory [time clock](#)<sup>[701]</sup> in is recommended for employees with multiple jobs. Refer to the [next topic](#)<sup>[699]</sup> for a description of jobs and permissions.



To add a new employee, open the employee editor, select the new employee's default job type and click the Add button. At minimum, update the employee first name, last name and number pad login. See below for a description of each field.

Restrictions are assigned on a job-type basis and are accessible in Back Office/Employees/. A job type can be enabled on the employee editor screen by selecting the Jobs tab, selecting the job from the drop-down list and clicking Add/Edit after selecting the job type. If mandatory time clock in is not enabled for users with multiple jobs, select one job as the default. If mandatory time clock is used, the default job type setting has no effect, since the employee is required to select the job at clock-in. Refer to the [Labor Cost](#)<sup>[722]</sup> topic for a description of the wage fields.

The screenshot shows the 'Employees' application window. The 'Jobs' tab is active. On the left, a list of employees is shown, with 'MCINERNEY SHANE' selected. The main area displays the job details for 'ASSISTANT MANAGER', including a pay rate of \$0.00. Below this, a table lists jobs with red 'X' marks indicating errors.

Job Title	Default Permission	Pay Type	Pay Rate
BARTENDER	Default Permission	Hourly	\$7.50 Per Hour
ASSISTANT MANAGER		Hourly	\$0.00 Per Hour

In addition to the permissions list, the employee information editor contains the following fields:

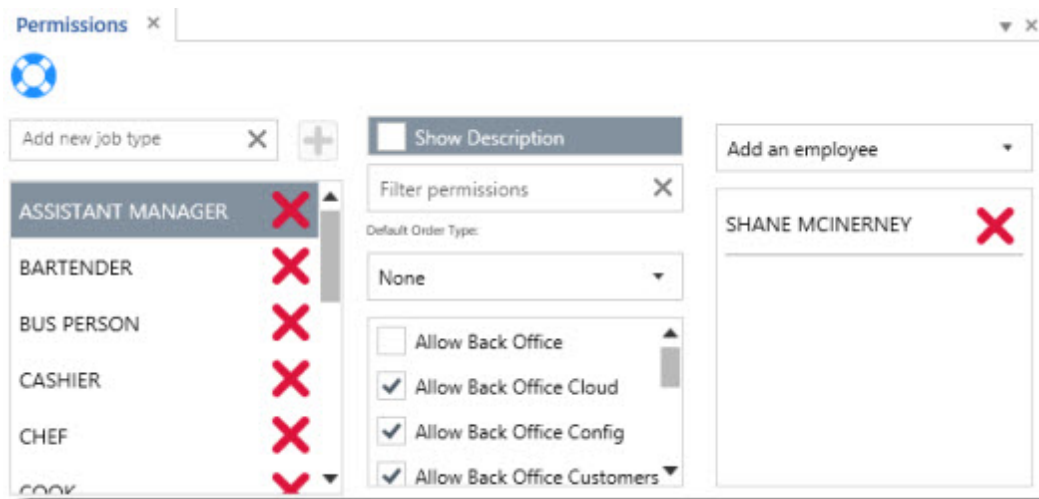
- **User Id:** This value is generated by the database and cannot be modified. It is a unique value that should not be confused with the login id.
- **Salutation**
- **First Name**
- **Middle Name**
- **Last Name**
- **Suffix**
- **Gender**
- **Login Id:** The numeric login id used when logging in using the on-screen keypad
- **Disable**
- **Time Clock Mandatory:** Force the user to clock in after logging in the first time
- **Birth Date**
- **User Name:** Used when using user name/password login only
- **Login Password:** Used when using user name/password login only
- **National Number**
- **Street Address**
- **Address Line 2**
- **City**
- **Region**
- **Postal Code**
- **Phone**
- **Date Hired**
- **Released**
- **Date Released**
- **Reason Released**



- **Driver License**
- **Driver License Expires**
- **Auto Insurance Company**
- **Auto Insurance**
- **Auto Insurance Expires**
- **Language**
- **Schedule Mandatory**
- **Notes**
- **Card Number (Card Swipe Login):** The card number from the employee login card not including the start or end sentinels. Refer to the [sample card configuration](#) <sup>742</sup> topic for additional information.
- **Pay Rate:** The actual pay rate for the employee (overrides the value specified in the Jobs list)
- **Image**

## 17.2 Jobs & Permissions

Employee jobs are used to prevent an employee from accessing most pos and back office functions. If the employee attempts to access a restricted function, the manager override screen appears so that an employee with a job that has sufficient permissions can temporarily allow access to the restricted function. Restrictions are assigned based on a user's job and are accessible in Back Office/Employees/. Each permission is enabled by checking the box next to the permission name.



New permissions are entered on the top line when the employee permissions grid is in list view mode. The employee permissions grid contains the following fields:

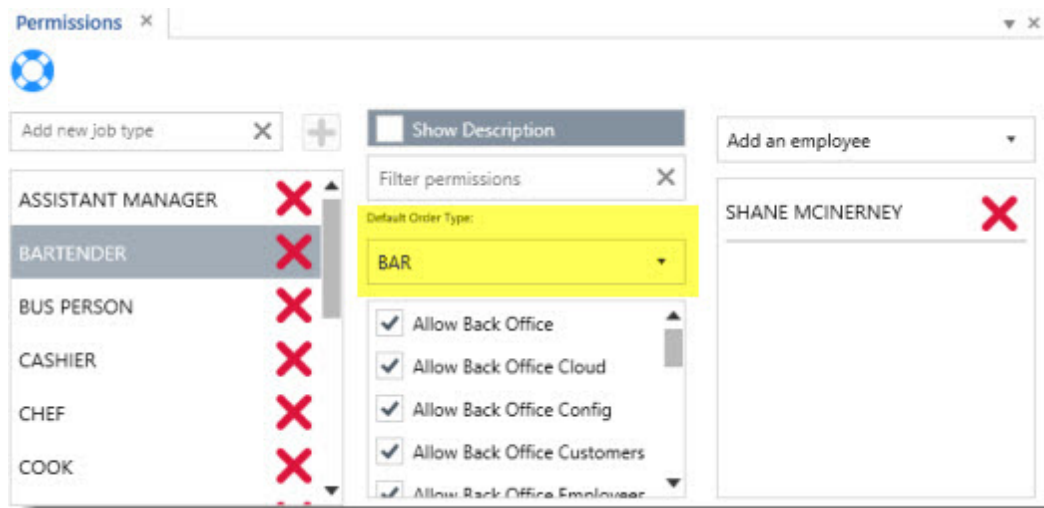
- **Job:** A short description of the job for use on reports
- **Disable:** Check the box to disable all users with the selected permission
- **Default Order Type:** If set to **None**, the start screen will appear after login. If an order type is selected the order entry screen with the order type's default menu will appear. For example, bartenders may be directed to the bar menu immediately after login.
- **Allow Back Office Summary:** Allow users to access the back office *Summary* tab
- **Allow Back Office Reports:** Allow users to access the back office *Reports* tab
- **Allow Back Office Menus:** Allow users to access the back office *Menus* tab
- **Allow Back Office Employees:** Allow users to access the back office *Employees* tab
- **Allow Back Office Customers:** Allow users to access the back office *Customers* tab
- **Allow Back Office Inventory:** Allow users to access the back office *Inventory* tab

- **Allow Back Office Configuration:** Allow users to access the back office *Configuration* tab
- **Show Back Office Status Bar:** Allow users to view the *Current Business Day* status bar
- **Allow Change Drawer Start Amount:** User can change the drawer start amount on the manager screen or in back office
- **Allow Settle:** Allow users with the selected permission to settle orders using any payment type
- **Allow Transaction Void:** Allow users with the selected permission to void transactions on the Settle screen
- **Allow No Sale:** Allow users with the selected permission to open the cash drawer
- **Allow Manager:** Allow users with the selected permission to access the manager screen
- **Allow Time Clock:** Allow users with the selected permission to access the time clock
- **Allow Messages:** Allow users with the selected permission to send and receive messages
- **Allow Remove Items:** Allow users with the selected permission to remove previously entered order items
- **Allow Void Slip:** Allow users with the selected permission to void orders
- **Allow Back Office:** Allow users with the selected permission to access back office. Also requires additional back office permissions defined below.
- **Allow Refire:** Allow users to send a order item to the prep printer or remote display a second time.
- **Allow Reprint:** Allow users with the selected permission to reprint order items
- **Allow Gift Certificate:** Allow users with the selected permission to access the gift card screen
- **Allow Discounts:** Allow users with the selected permission to issue discounts on the order entry screen
- **Allow Manual Discounts:** Allow users with the selected permission to issue manual discounts. Manual discount are discounts that require the user to enter the discount amount
- **Allow Hold:** Allow users with the selected permission to hold order items
- **Allow Cross Edit:** Allow users with the selected permission to edit other user's orders
- **Allow Split:** Allow users with the selected permission to split orders
- **Allow Combine:** Allow users with the selected permission to combine orders
- **Allow Customer Accounts:** Allow users with the selected permission to access the house accounts screen
- **Allow Misc Items:** Allow users with the selected permission to use the MISC button on the order entry screen. Miscellaneous items are items that the user enters using an on-screen keyboard
- **Declare Gratuities:** Require the user to declare cash gratuities when clocking out
- **Allow Override:** Allow users with the selected permission to override other user's permissions (the user may also override their own permissions if multiple permissions are used)
- **Allow Comp:** All the user to issue COMP on the order entry screen bar menu
- **Allow Refund:** Allow users with the selected permission to issue refunds
- **Pay Method:** The default pay method for the selected permission
- **Pay Rate:** The default pay rate for users with the selected permission
- **Manage Fingerprints:** Allow users to access the fingerprint management utility. Reserved for future use
- **Allow Payouts:** Allow users to issue cash payouts
- **Time Clock Only:** Restrict user from all program functions except for time clock
- **Allow SQL Query:** Allow users to run a SQL query in back office - database setup
- **Allow Cash Drawer Open:** Allow users to open the cash drawer (settle, payout or no-sale permission also required)
- **Allow Suspend:** Allow users to suspend orders on the order entry screen
- **Allow Order Entry:** Allow users to access the order entry screen
- **Allow Order Transfer:** Allow users to transfer open orders
- **Order Entry Screen Cash Button:** Enable the cash button on the order entry screen for the selected job type
- **Allow Cash Sale:** Allow cash sale from the order entry or settle screen
- **Allow Credit Card Sale:** Allow cc sale from the order entry or settle screen
- **Allow Credit Card Gratuity:** Allow user to capture preauth or add cc gratuity
- **Allow Price Change:** Allow price change on the order entry retail screen
- **Allow Gift Cards:** Allow users to access the gift card screen
- **Allow House Accounts:** Allow users access to the house accounts screen
- **Allow Misc Items:** Allow users to use the MISC button on the order entry screen
- **Allow Override:** Allow users to override other user's permissions
- **Declare Gratuities:** Check box to require the user to declare cash gratuities when clocking out
- **Allow Bar Tab Cross Edit:** Check box to show bar tabs from all bartenders when recall button is pressed
- **Allow Prep Reprint:** Allow users to send a previously submitted order item to the prep printer or display
- **Allow Room Charge:** Allow users to run a room charge transaction on the hotel interface
- **Allow Bar Tab Override:** Allow users to add additional items to an order that has exceeded the bar tab limit
- **Order Entry Screen Gratuity Button:** Allow users to add manual gratuities on the order entry screen
- **Manager Banking:** Allow users to access the banking button on the manager screen (Allow Manager permission required)
- **Manager Cash Drops:** Allow users to access the cash drops button on the manager screen (Allow Manager permission required)
- **Manager End Of Day:** Allow users to access the end of day button on the manager screen (Allow Manager permission required)

- **Manager Orders:** Allow users to access the orders button on the manager screen (Allow Manager permission required)
- **Manager Reports:** Allow users to access the reports button on the manager screen (Allow Manager permission required)
- **Manager Reset Drawer:** Allow users to access the drawer reset button on the manager screen (Allow Manager permission required)
- **Manager System:** Allow users to access the system button on the manager screen (Allow Manager permission required)
- **Manager Shut Down:** Allow users to access the shutdown button on the manager screen (Allow Manager permission required)
- **Seating Chart Designer:** Allow users to access the seating chart editor

### Default Order Type

Users with specialized permissions such as bartenders may find it convenient to bypass the start screen and view menu items directly after logging in. For example, to force the bartender directly to the bar order type on the order entry screen, select Bar as the default order type and Bottle Beer as the default bar category. The default menu category is selected on the [Order Types](#) configuration screen. This feature is also convenient for counter staff in coffee houses, where the cashier can be taken directly to the most popular coffee drinks category after logging in.



## 17.3 Multiple Jobs

AmigoPOS includes the ability to assign multiple jobs to individual employees. This feature requires that the **Time Clock Mandatory** value is set to Yes for each employee that is assigned to multiple jobs. When clocking in, the employee is prompted to select the job before clock in is allowed.

The screenshot shows the 'Employees' window with the 'Main Settings' tab selected. On the left, a list of employees is shown, with 'MCINERNEY SHANE' selected. On the right, the 'Time Clock Preferences' section is expanded, and the 'Time Clock Mandatory' setting is set to 'Yes'. Below this, the 'Schedule Mandatory' setting is set to 'No', and the 'Date Hired' is '10/05/2006'. The 'Released' and 'Date Released' settings are also visible.

Setting	Value
Time Clock Mandatory	Yes
Schedule Mandatory	No
Date Hired	10/05/2006
Released	No
Date Released	01/01/2004

**Time Clock Mandatory**  
Set to Yes to force the employee to clock in before using the pos

To assign an employee to multiple jobs, open in the Employees list in Back Office, select the employee and click on the Jobs tab. Select a job and click **Add/Edit**. All changes are saved automatically. When the **Time Clock Mandatory** value is set to No, the employee will not be required to select a job unless the employee uses the time clock to clock in. If the employee is not clocked in, the default job is used to determine the employee's permissions. In addition, the default job is always used when the employee logs in to Back Office stand-alone. Refer to the [Labor Cost](#) <sup>722</sup> topic for a description of the wage fields.

The screenshot shows the 'Employees' window with the 'Jobs' tab selected. On the left, the same list of employees is shown, with 'MCINERNEY SHANE' selected. On the right, the 'Jobs' section is expanded, showing a table of jobs assigned to the selected employee. The table has columns for 'Job', 'Default Permission', 'Pay Type', and 'Pay Rate'. Two jobs are listed: 'BARTENDER' and 'ASSISTANT MANAGER'. Both jobs have a 'Default Permission' of 'No' (indicated by a red X) and a 'Pay Rate' of '\$0.00 Per Hour'. The 'ASSISTANT MANAGER' job is also highlighted.

Job	Default Permission	Pay Type	Pay Rate
BARTENDER	No	Hourly	\$7.50 Per Hour
ASSISTANT MANAGER	No	Hourly	\$0.00 Per Hour

## 17.4 Time Clock

AmigoPOS includes the ability to restrict users from accessing the system until the user is clock-in. In addition, the user may be required to select a job (when [Multiple Jobs](#) <sup>700</sup> are used) or to select a cash drawer (when multiple [cash drawers](#) <sup>137</sup> are used). Most time clock settings are available in **Back Office>Settings>Main Settings>Time Clock**. Other settings are shown below the relevant screen images in the topic below.

**TIME CLOCK SETTINGS**

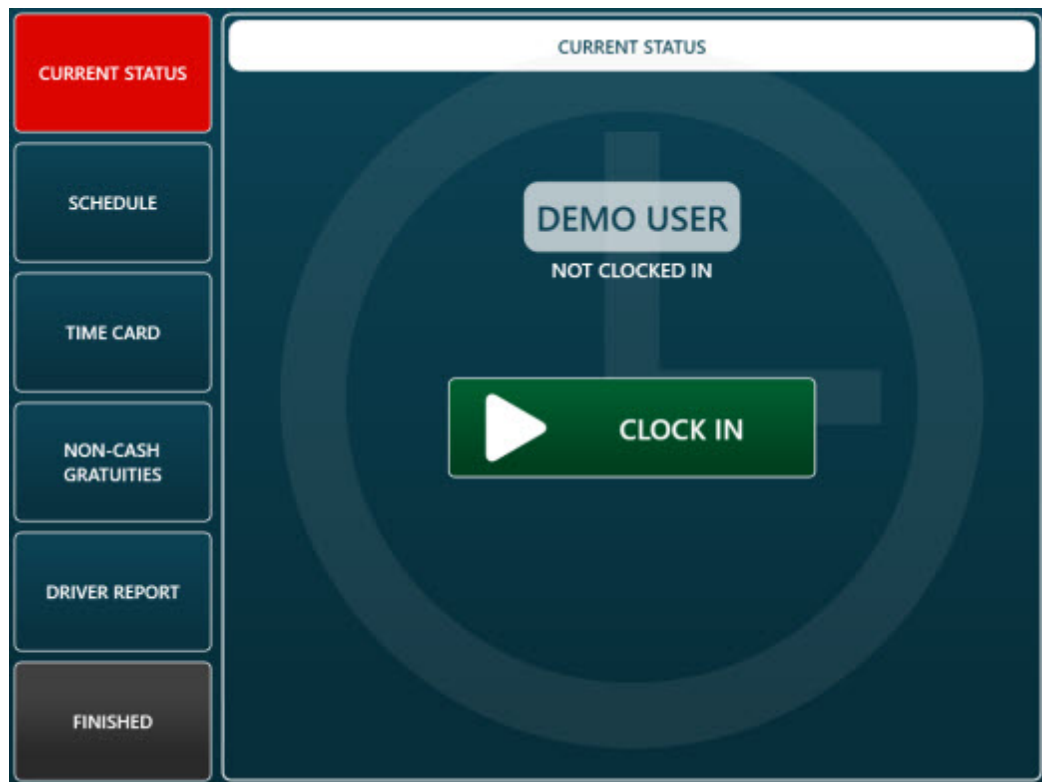
Allow Cash Drawer Change	No
Auto Populate Cash Tips Field	No
Display Tips Declaration Summary	Yes
Enforce Minimum Cash Tips Declaration	Yes
Overtime Hours 1	8
Overtime Hours 2	12
Overtime Hours Rate 1	1
Overtime Hours Rate 2	2

**Allow Cash Drawer Change**  
Allow users to change drawer assignment in the middle of a shift

The following settings are available on the All Program Settings screen:

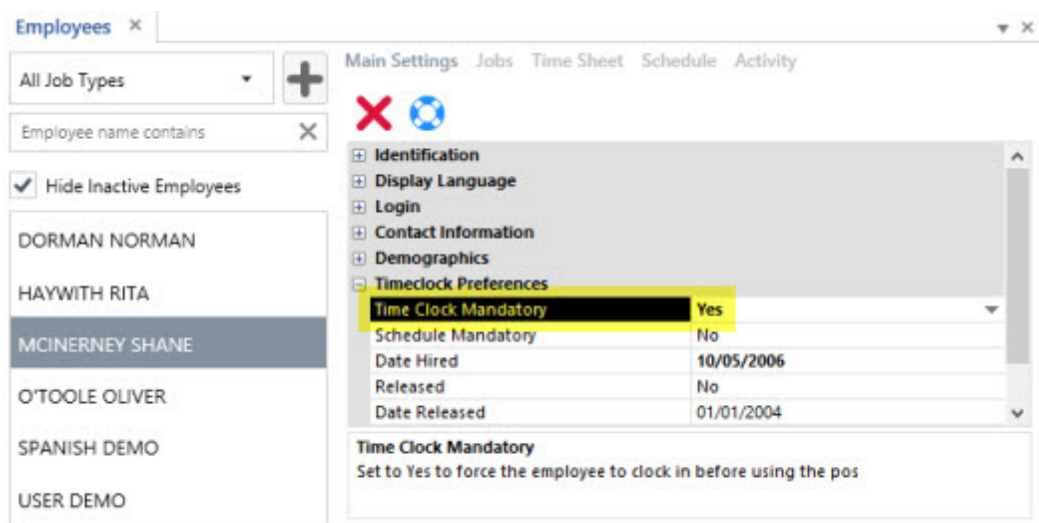
- **Allow Cash Drawer Change:** Allow users to change drawer assignment in the middle of a shift
- **Prevent Open Orders Clock Out:** Prevent clock-out if the user has open orders
- **Prevent Unscheduled Clock In:** (reserved for future use) Set to Yes to disable clock in for users that are no currently scheduled
- **Print Clock Out Bank Report:** Set to Yes to auto-print the server bank summary report when the user clocks out on the time clock screen
- **Print Delivery Charges Clock Out:** Print collected delivery charges on clock out report for drivers
- **Suppress Time Clock Activity Report:** Do not display the time clock activity on the drawer reset report.

When clocking in, the employee must first log in to AmigoPOS and then press the Time Clock button.

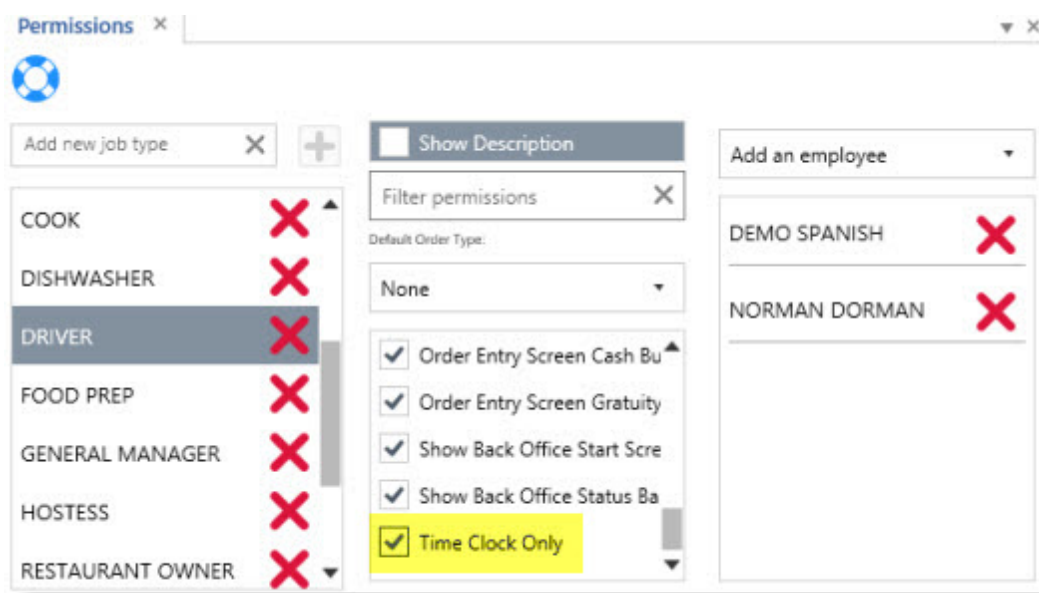


Employee Clock-In

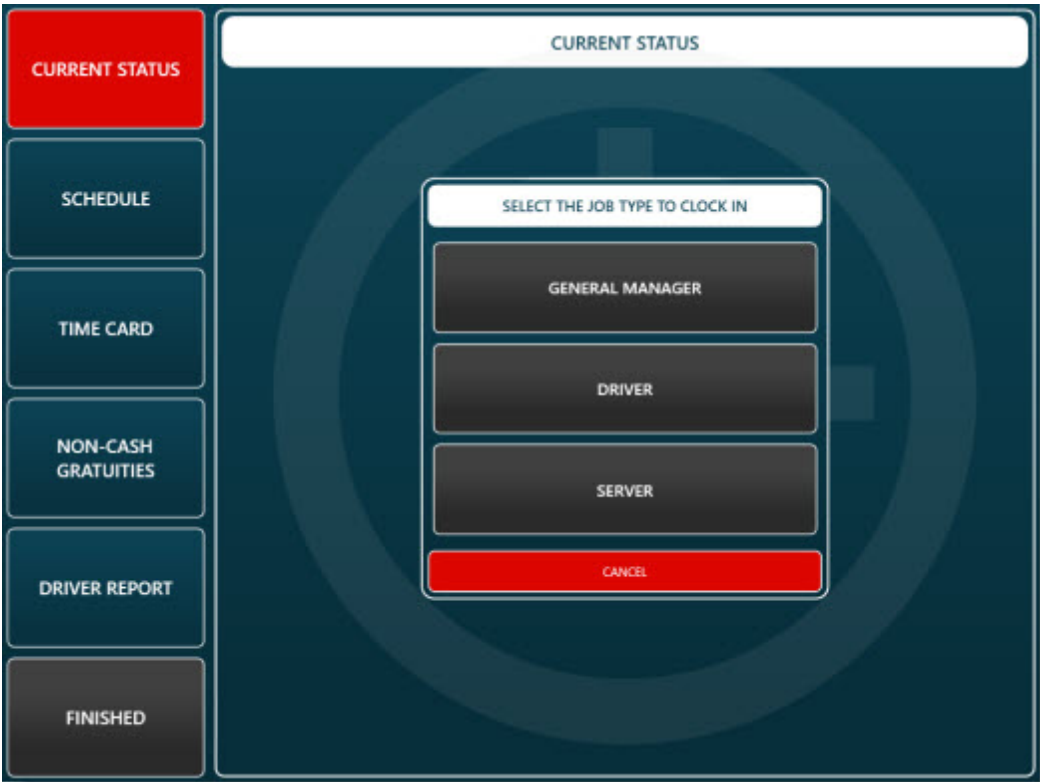
Employees can be forced to clock-in before being allowed to use the POS by setting the value of **Time Clock Mandatory** to Yes in the [employee editor](#)<sup>696</sup>.



The employee can be restricted to using only the Time Clock by selecting the job type and then checking the box next to the **Time Clock Only** permission.

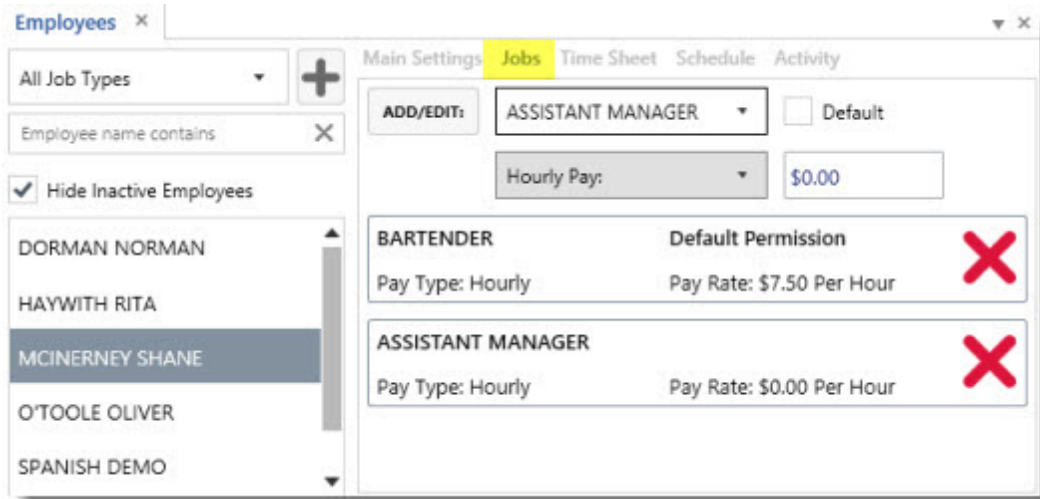


If the employee is assigned multiple job types, the job type selection prompt appears after pressing the green clock-in button. The employee must select the job type to clock in.



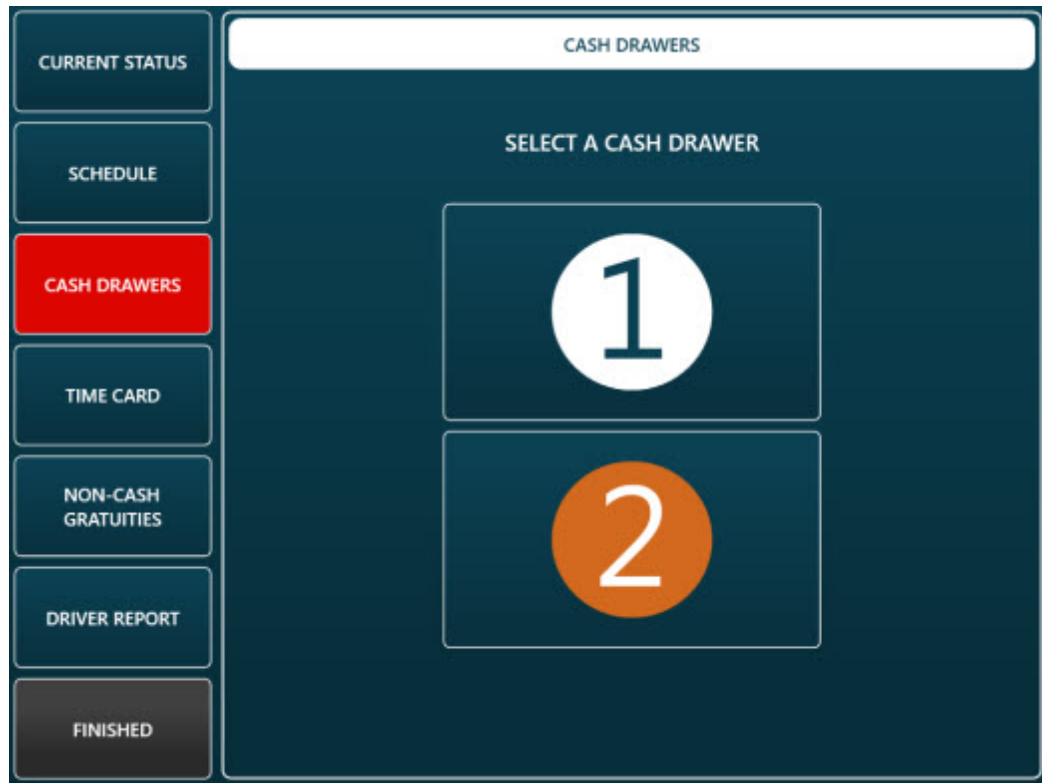
Job Selection at Clock In

Multiple job types are assigned to a single employee in the back office employee editor.



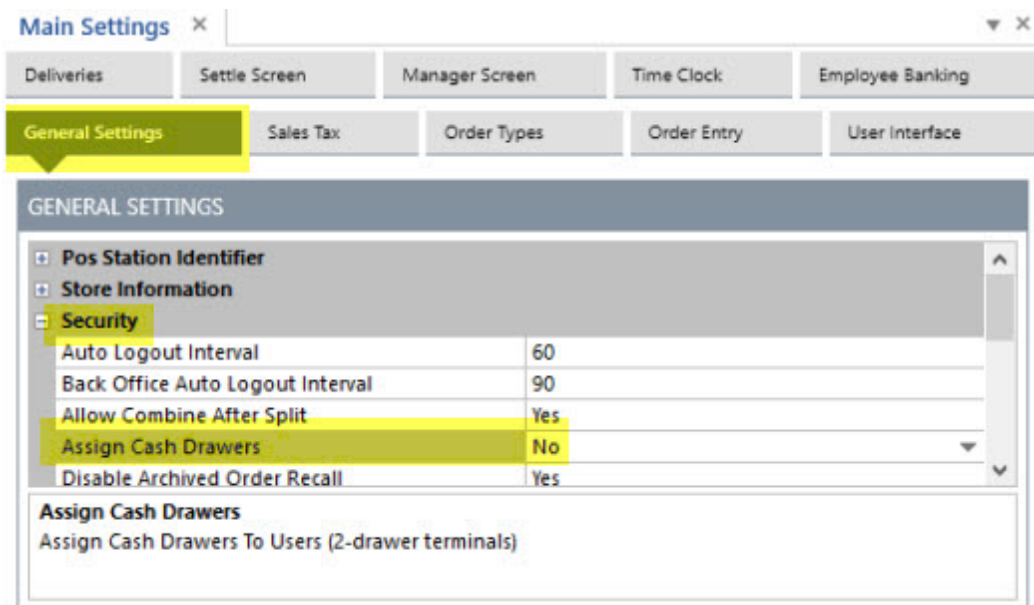
If multiple cash drawers are used, the employee is prompted to select the cash drawer after clocking in.





Cash Drawer Selection

Multiple cash drawers are enabled in **Back Office>Settings>Main Settings>General Settings>Security**.



If server banking is enabled, the employee may view and print the liability report by pressing the Bank Report button.

**DRIVER LIABILITIES**

My Restaurant  
600 Biscayne Blvd  
Miami, FL 33130  
111-222-3333

-----  
DRIVER LIABILITIES  
DEMO USER  
2/2/2014 12:11:51 PM  
-----  
DELIVERIES  
(1) ORDER 23 27.20  
DELIVERIES TOTAL (1): 27.20  
  
DEMO U PAY THIS AMOUNT: \$27.20

PRINT

**Server Bank Report**

The weekly time card can be viewed and printed by pressing the Time Card button.

**TIME CARD**

My Restaurant  
600 Biscayne Blvd  
Miami, FL 33130  
111-222-3333

-----

DEMO USER  
TIME CARD  
2/2/2014 12:12:38 PM

-----

Sun Feb 2	12:10PM - 12:10PM	0.00
Sun Feb 2	12:10PM - 12:10PM	0.00

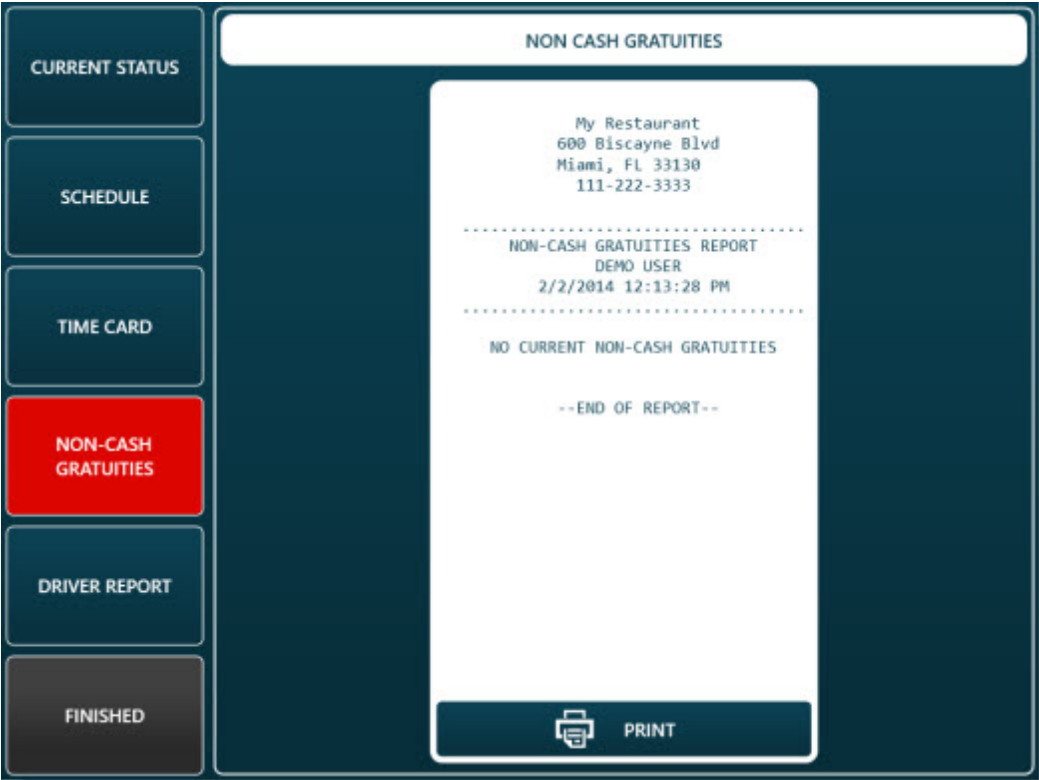
-----

TOTAL HOURS 0.00

PRINT

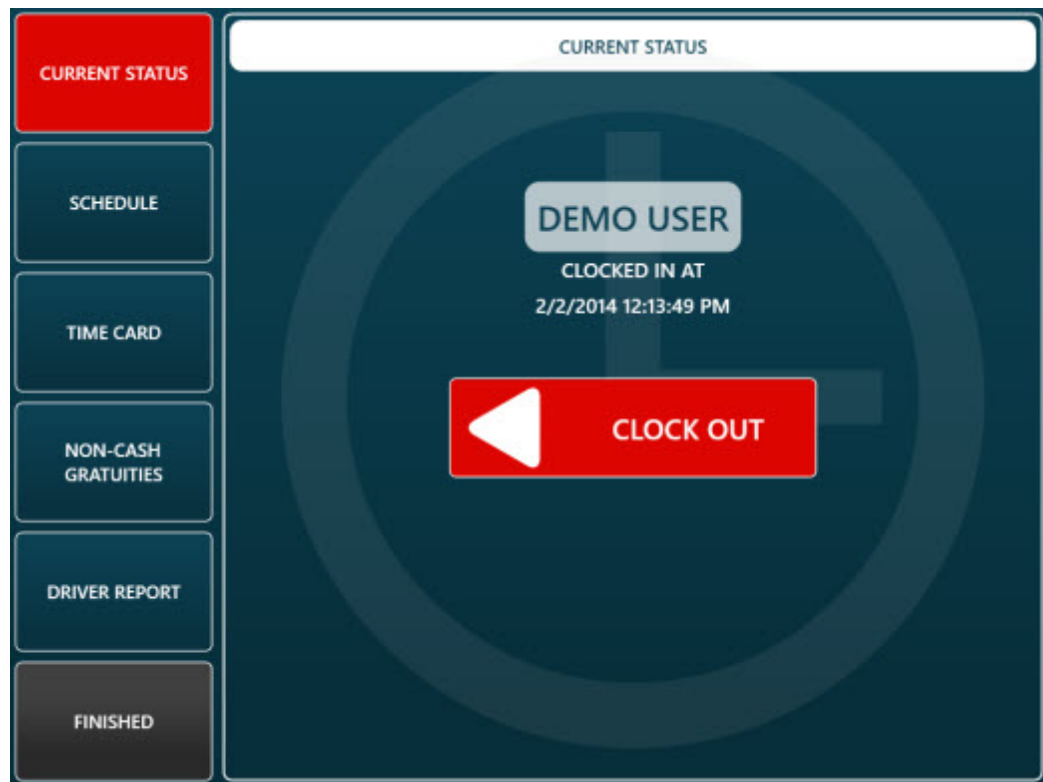
### Weekly Time Card

If server banking is not used, the employee may view and print the non-cash gratuities by pressing the Non-Cash Gratuities button at the bottom. Non-cash gratuities are generally credit card, gift card and room charge gratuities.



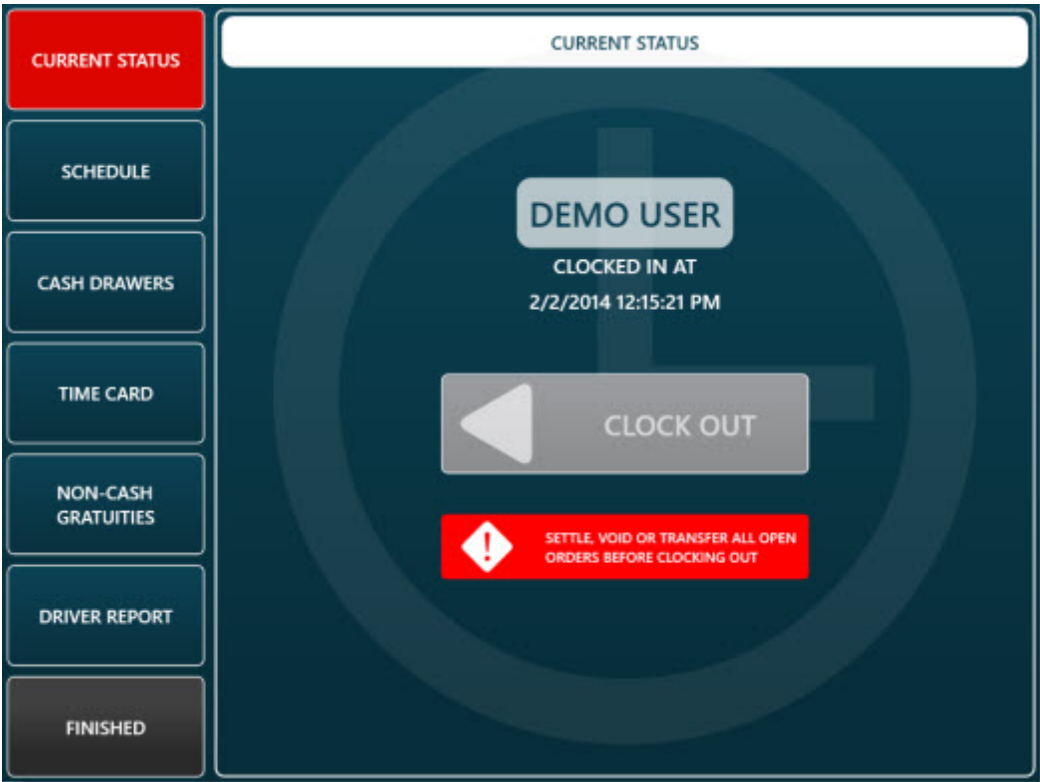
**Non-Cash Gratuities**

The employee can return to the Time Clock screen at any time and press the Current Status button to clock out.




### Employee Clock-Out

The employee can be prevented from clocking out if open orders exist. This feature is useful when employee banking is used to ensure that the end shift is run for the employee before the employee clocks out. The setting location is shown in the first image at the top of this topic.

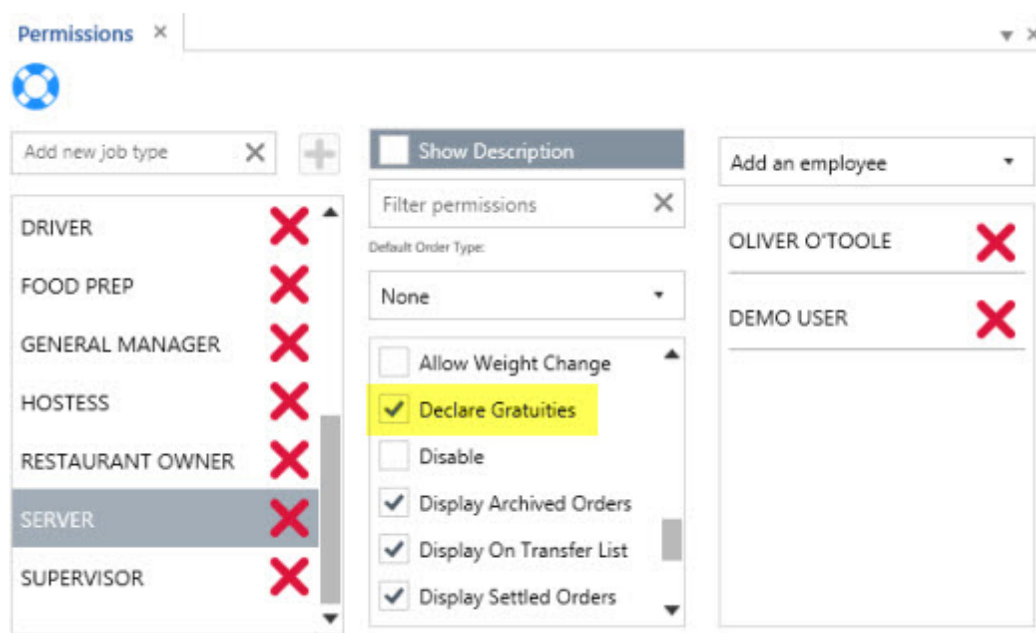


The employee can be forced to enter the cash gratuities total when clocking out.



**Mandatory Cash Gratuities Declaration**

The **Declare Gratuities** [permission](#) <sup>698</sup> is set to Yes to force the employee to enter cash gratuities at clock out.



## 17.5 Cash Tips Declaration

Mandatory cash tip declaration at clock out can be enabled for any job type by setting the Declare Gratuities [permission](#) <sup>698</sup>. In addition, the minimum allowable percentage can be enforced so that the employee cannot enter an amount lower than the predefined threshold. The following settings are used to enable cash tip declaration and enforcement on the time clock screen:

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	<b>Time Clock</b>	Employee Banking

TIME CLOCK SETTINGS	
Allow Cash Drawer Change	No
<b>Auto Populate Cash Tips Field</b>	No
Display Tips Declaration Summary	Yes
Enforce Minimum Cash Tips Declaration	Yes
Overtime Hours 1	8
Overtime Hours 2	12
Overtime Hours Rate 1	1
Overtime Hours Rate 2	2
Prevent Open Tickets Clock Out	No
Print Clock Out Bank Report	Yes
<b>Tips Declaration Percentage</b>	15

**Auto Populate Cash Tips Field**  
 Set to Yes to automatically fill in the time clock screen cash tips declaration field with the minimum allowable cash tips declaration

- **Tips Declaration Percentage:** Enter a whole number (no decimal) percentage value used to calculate the minimum cash tips declaration on the time clock screen
- **Display Tips Declaration Summary:** Set to Yes to display the current business day sales and minimum gratuity declaration on the time clock cash tips declaration screen
- **Enforce Minimum Cash Tips Declaration:** Set to Yes to prevent the user from entering an amount less than the minimum calculated cash tips
- **Auto Populate Cash Tips Field:** Set to Yes to automatically fill in the time clock screen cash tips declaration field with the minimum allowable cash tips declaration



**Display Tips Declaration Summary Disabled**

When the tipable sales summary display is enabled, the following fields are displayed at the left:

- **Tipable Sales:** The employee's total sales for the current business day *excluding* [order types](#)<sup>[96]</sup> where the **Include In Minimum Tip Declaration** setting is disabled (see below)
- **Tips Percentage:** The tips declaration percentage value described in the previous paragraph
- **Minimum Tips Declaration:** The minimum tips declaration based on the tipable sales and tips percentage
- **Non-Cash Tips:** Non-cash tips already received from credit card sales
- **Minimum Cash Tips Declaration:** The difference between the Minimum Tips Declaration and Non-Cash Tips

CASH GRATUITIES DECLARATION

TIPABLE SALES SUMMARY

DEMO USER

TIPABLE SALES

\$130.54

TIPS PERCENTAGE

15%

MINIMUM TIPS DECLARATION

\$19.58

NON CASH TIPS

\$12.00

MINIMUM CASH TIPS DECLARATION

\$7.58

ENTER CASH TIPS RECEIVED

CANCEL CLOCK OUT

1

2

3

4

5

6

7

8

9

0

Display Tips Declaration Summary Enabled

If **Enforce Minimum Cash Tips Declaration** is enabled and the employee attempts to clock out with an amount lower than the minimum cash tips declaration, an audible alert is played and a red alert appears next to the invalid amount so that the employee is prevented from clocking out.

**CASH GRATUITIES DECLARATION**

**TIPABLE SALES SUMMARY**

**DEMO USER**

TIPABLE SALES	\$130.54
TIPS PERCENTAGE	15%
MINIMUM TIPS DECLARATION	\$19.58
NON CASH TIPS	\$12.00
MINIMUM CASH TIPS DECLARATION	<b>\$7.58</b>

**ENTER CASH TIPS RECEIVED**

**\$5.00**

**CANCEL CLOCK OUT**

1 2 3  
4 5 6  
7 8 9  
0 [Play]

**Enforce Minimum Cash Tips Declaration Enabled**

Some order types such as delivery or takeout are excluded from the tipable sales total. Open the order types editor and uncheck the box next to **Include In Minimum Tip Declaration** in order to exclude orders of this type from the tipable sales total.

**ORDER TYPE SETTINGS**

**COUNTER**  
**DELIVERY**  
**DINE-IN**  
**DRIVE-THRU**  
**PICK-UP**

- General Settings
- Surcharges
- Mandatory Gratuity
- Customer Receipt
- Label Printers
- Order Entry
- Sales Tax
- Remote Display
- Time Clock
  - Include In Minimum Tip Declaration** ☒

**Include In Minimum Tip Declaration**  
Uncheck the box to exclude orders of this type when calculating the minimum gratuity declaration on the time clock screen.

If a mistake is made when entering the cash tips received, open the **Time Sheet Editor** in **Back Office>Employees** and click **Edit** to adjust the cash tips received value for the time sheet record.

**TIME SHEET EDITOR**

Time Sheet ID: 2  
 Employee: OLIVER O'TOOLE  
 Job: SERVER  
 Clock In: Saturday, April 15, 2017 4:25:26 AM  
 Clock Out: ☒ Saturday, April 15, 2017 4:25:35 AM  
 Cash Drawer: 1  
 Cash Tips: \$50.00

**CANCEL** **SAVE**

The full size time sheet report displays the tipable sales, cash tips, non-cash tips and total tips for all employees.

## EMPLOYEE HOURS

DATE RANGE: 4/11/2015 6:00:00 AM - 4/12/2015 5:59:59 AM

### 63 Total Hours

	Clock In	Clock Out	Tipable Sales	Cash Tips	Other Tips	Total Tips
R	7:20:00 AM	8:21:00 AM	.00	9.00	12.00	21.00
R	7:23:26 AM	8:23:27 AM	.00	7.88	12.00	19.88
R	7:27:00 AM	8:27:01 AM	.00	8.88	12.00	20.88
R	7:29:01 AM	8:29:02 AM	130.54	8.89	12.00	20.89
R	9:37:10 AM	9:37:11 AM	.00	.00	.00	.00
R	10:30:50 AM	10:30:50 AM	.00	.00	.00	.00
R	10:33:15 AM	10:33:16 AM	.00	.00	.00	.00
R	10:41:24 AM	10:41:30 AM	130.54	50.00	12.00	62.00
R	10:43:00 AM	10:43:07 AM	130.54	14.70	12.00	26.70
R	10:43:12 AM	10:43:57 AM	130.54	25.00	12.00	37.00
R	10:44:20 AM	10:44:29 AM	130.54	50.00	12.00	62.00
R	10:44:50 AM	10:46:17 AM	130.54	25.00	12.00	37.00
R	11:08:23 AM	11:16:21 AM	.00	1.00	.00	1.00
R	11:16:28 AM	11:16:35 AM	.00	1.25	.00	1.25
R	11:17:03 AM	11:44:35 AM	130.54	7.58	12.00	19.58
al Hours			\$913.78	\$209.18	\$120.00	\$329.18

Time Sheet Report

## 17.6 Scheduler

AmigoPOS includes an employee scheduler with the ability to copy a pre-defined weekly schedule many weeks in advance, minimizing the time required to perform routine scheduling tasks. In Back Office/Employees/Time Sheet & Schedule, click the Schedule button.

### Calendar Mode

The default calendar mode is useful for viewing the schedule on a horizontal timeline. Each shift is described by the job and time range. The cell color is determined by the shift background color setting described [below](#). Click the Print button to send the employee schedule to the receipt printer. Click the employee name to open the employee editor jobs tab. Click the shift cell to add a shift or edit an existing shift.

Employees		Apr 9	Apr 10	Apr 11	Apr 12	Apr 13	Apr 14
DORMAN NORMAN	Print	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift
HAYWITH RITA	Print	Add Shift	FOOD PREP 10:00 AM - 4:00 PM	Add Shift	Add Shift	Add Shift	Add Shift
MCINERNEY SHANE	Print	Add Shift	Add Shift	Add Shift	BARTENDER 10:00 AM - 4:00 PM	Add Shift	Add Shift
O'TOOLE OLIVER	Print	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift
SPANISH DEMO	Print	Add Shift	GENERAL MANAGER 6:00 AM - 2:00 PM	Add Shift	Add Shift	Add Shift	Add Shift
USER DEMO	Print	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift	GENERAL MANAGER 10:00 AM - 4:00 PM

Schedule in Calendar Mode

### List Mode

Employees are listed on the left side of the screen. Select a specific job type to filter the list. The Hour View filter enables the user to view employee hours for various time periods. The default view of the scheduler grid is Day View, where the selected day's schedule is shown. Columns may be dragged to the top of the schedule to group by employee, job type or shift. The weekly schedule for an individual employee is shown whenever an employee is selected from the list. The schedule can be generated for any week, past or present, by selecting a new date range.

Scheduler x

Start: 4/9/2017

End: 4/16/2017

All Job Types

List View

TOTAL HOURS: 26.00 LABOR COST: \$0.00

Employees	Shift	Job Type	Start/End	Labor Cost
RITA HAYWITH	FOOD PREP		4/10/2017 10:00:00 AM-4:00:00 PM	\$0.00
DEMO SPANISH	GENERAL MANAGER		4/10/2017 6:00:00 AM-2:00:00 PM	\$0.00
SHANE MCINERNEY	BARTENDER		4/12/2017 10:00:00 AM-4:00:00 PM	\$0.00

Schedule in List Mode

### Multiple Shifts

If an employee is scheduled for multiple shifts in the same calendar day, the cell is displayed with a yellow background. Change the view to list mode or print the employee schedule to view the shift details.

Scheduler x

Start: 4/9/2017

End: 4/16/2017

All Job Types

Calendar View

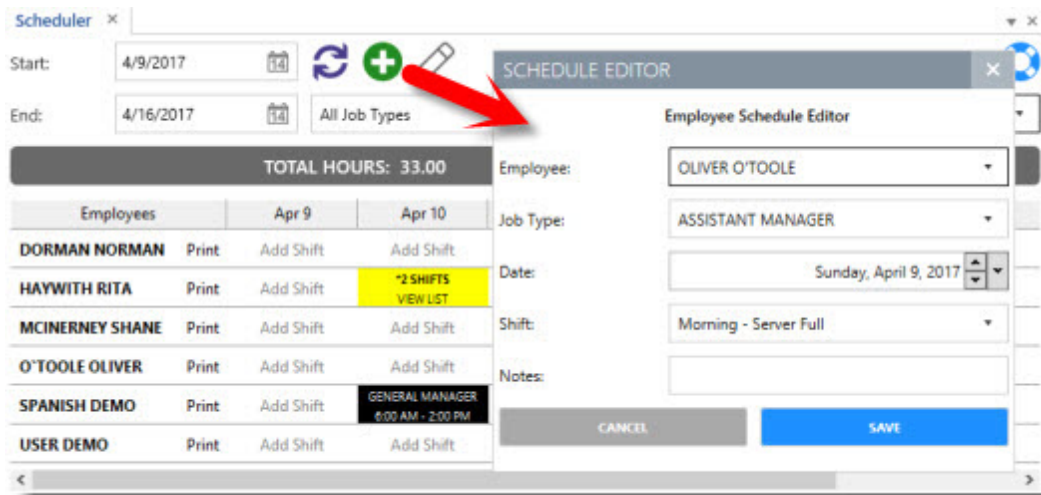
TOTAL HOURS: 33.00 LABOR COST: \$0.00

Employees	Print	Apr 9	Apr 10	Apr 11	Apr 12	Apr 13	Apr 14
DORMAN NORMAN	Print	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift
HAYWITH RITA	Print	Add Shift	2 SHIFTS VIEW LIST	Add Shift	Add Shift	Add Shift	Add Shift
MCINERNEY SHANE	Print	Add Shift	Add Shift	Add Shift	BARTENDER 10:00 AM - 4:00 PM	Add Shift	Add Shift
O'TOOLE OLIVER	Print	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift
SPANISH DEMO	Print	Add Shift	GENERAL MANAGER 6:00 AM - 2:00 PM	Add Shift	Add Shift	Add Shift	Add Shift
USER DEMO	Print	Add Shift	Add Shift	Add Shift	Add Shift	Add Shift	GENERAL MANAGER 10:00 AM - 4:00 PM

Multiple Shifts

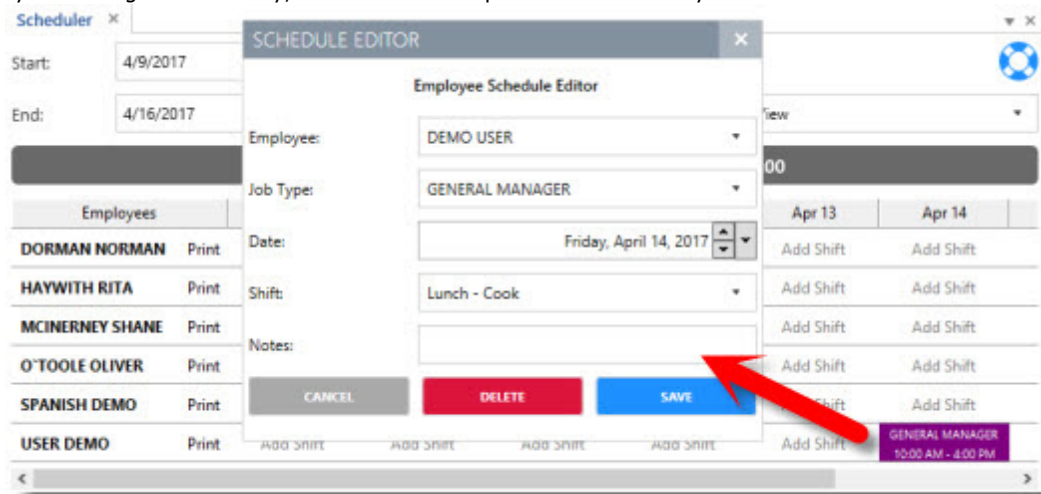
### New Shift

Click the **Add New** button or **Add Shift** link to add a new schedule entry. Adding a new schedule entry is simplified through the use of pre-defined shifts. When adding a new schedule entry, ensure that the employee has a least one job type defined or the entry cannot be added.



Add New Schedule Entry

To modify an existing schedule entry, click on the cell to open the schedule entry editor.

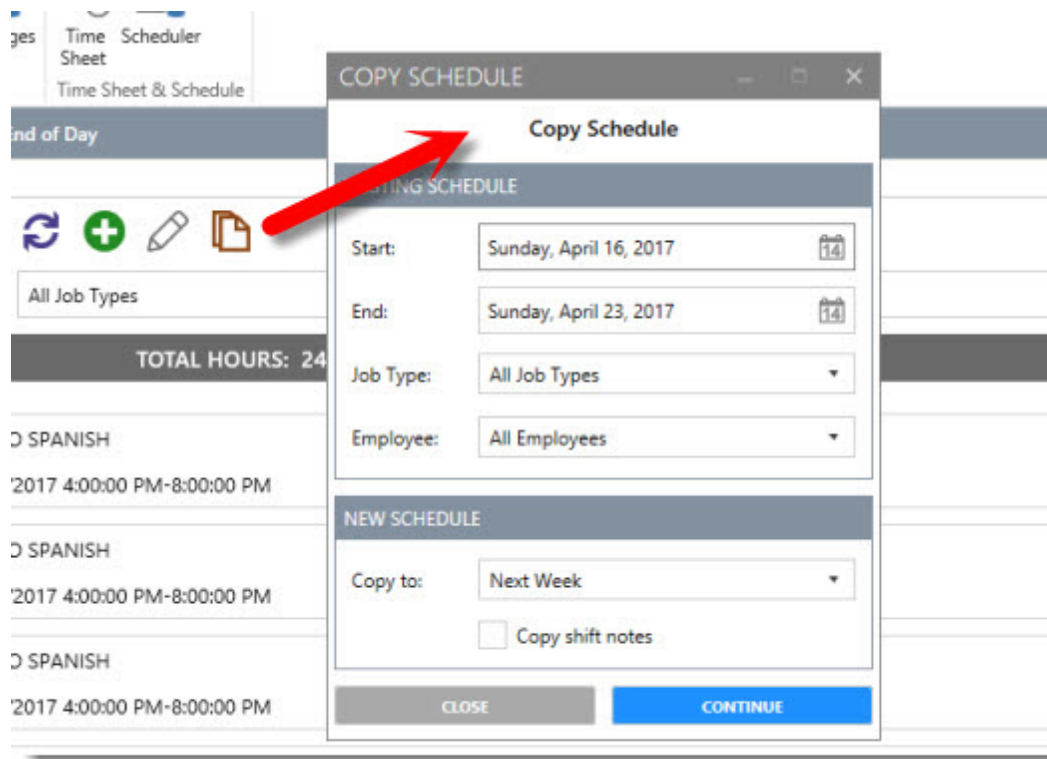


Edit Existing Schedule Entry

### Copy Schedule

To copy an individual employee schedule or all employee schedules to a future date, click the **Copy Schedule** button and select the date range to copy from. Select an individual employee or specify a specific job type if required. The schedule for the specified dates can be cloned from 1 to 12 weeks in the future. Schedule entry notes are not cloned by default. Check the **Copy shift notes** box to force schedule entry notes to be copied.

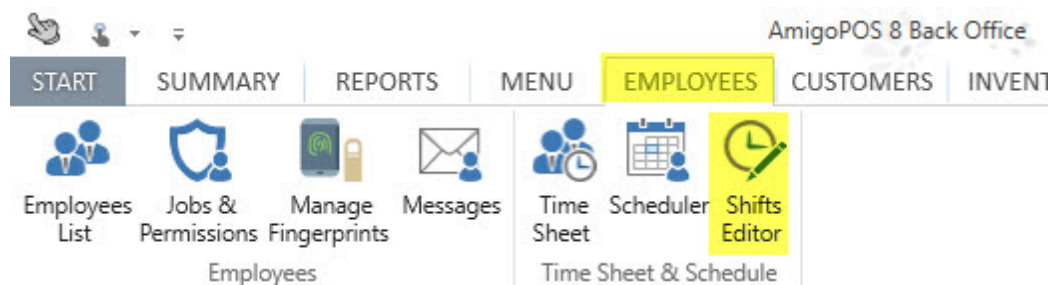




**Copy Existing Schedule**

### Shift Definitions

Click the Edit Shifts button to add or modify the shift definitions. Enter new shift definitions on the top line, using am/pm or 24-hour time format. Enter the total hours and select the background. Click the Enter key on the keyboard to save the new shift definition.





SCHEDULE SHIFTS EDITOR						
<div> </div>						
		Description	Start Shift	End Shift	Shift Hours	Color
+ Click here to add a new row						
		Morning - Server Full	6:00 AM	2:00 PM	8.00	
		Morning - Server Short	7:00 AM	11:30 AM	4.50	
		Morning - Cook #1	6:00 AM	12:00 PM	6.00	
		Morning - Cook #2	8:00 AM	3:00 PM	7.00	
		Morning - Dishwasher	6:00 AM	2:00 PM	8.00	
		Morning	6:00 AM	2:00 PM	8.00	
		Lunch - Server	10:00 AM	4:00 PM	6.00	
		Lunch - Cook	10:00 AM	4:00 PM	6.00	
		Lunch - Dishwasher	10:00 AM	4:00 PM	6.00	

Shift Definitions Editor

## 17.7 Labor Cost

AmigoPOS can estimate the labor cost based on the employee's hourly pay, the number of hours worked and whether to use overtimes rates. Each employee's job determines the labor rate and is set in the employee editor under the Jobs tab. Select the job from the drop-down list and specify whether the job is paid hourly or salaried. The labor cost shown on reports and other screens is always calculated based on an hourly rate. For salaried employees, enter the estimated hourly rate. For example, the General Manager job for the employee below is based on a weekly salary of \$600 and the estimated cost per hour is \$15.

Employees

All Job Types

+

Employee name contains

☒ Hide Inactive Employees

DORMAN NORMAN  
HAYWITH RITA  
**MCINERNEY SHANE**  
OTOOLE OLIVER  
SPANISH DEMO  
USER DEMO

Main Settings
Jobs
Time Sheet
Schedule
Activity

ADD/EDIT:

BARTENDER

☐ Default

Weekly Pay:

\$60.00

Hourly Pay Estimate:

\$15.00

BARTENDER

Pay Type: Salary

Pay Rate: \$600.00 Per Week

Employee Editor Jobs Tab

### Overtime

AmigoPOS can calculate overtime labor cost as follows:

- **Overtime Hours 1:** Enter the number of hours in a normal shift before the first overtime rate is applied. Overtime calculations can be disabled by entering a high value (i.e. 99) for the Overtime Hours 1 setting so that the regular pay rate is always used in labor cost calculations.
- **Overtime Rate 1:** Enter the rate to apply for hours exceeding the hours in a normal shift but less than the Overtime Hours 2 value
- **Overtime Hours 2:** Enter the number of hours in a shift before the second overtime rate is applied
- **Overtime Rate 2:** Enter the rate to apply for hours exceeding the Overtime Hours 2 value

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	<b>Time Clock</b>	Employee Banking

TIME CLOCK SETTINGS	
Allow Cash Drawer Change	No
Auto Populate Cash Tips Field	No
Display Tips Declaration Summary	Yes
Enforce Minimum Cash Tips Declaration	Yes
<b>Overtime Hours 1</b>	<b>8</b>
<b>Overtime Hours 2</b>	<b>12</b>
<b>Overtime Hours Rate 1</b>	<b>1</b>
<b>Overtime Hours Rate 2</b>	<b>2</b>
Prevent Open Tickets Clock Out	No
Print Clock Out Bank Report	Yes
Tips Declaration Percentage	15

**Overtime Hours 1**  
 Enter the number of hours before OvertimeHoursRate1 is used to calculate labor cost

For example, if an hourly employee works a 14 hour shift based on a regular hourly pay of \$10/hour with the overtime rates shown above, the labor cost is calculated as shown below and is available on the time sheet editor and employee hours full size report.

Regular Pay	8 hrs@\$10/hour	\$80.00
Overtime 1 Pay	4 hrs@\$10/hour * 1.5	\$60.00
Overtime 2 Pay	2 hrs@\$10/hour * 2	\$40.00
<b>Total:</b>		<b>\$180.00</b>

<b>General Manager: Boomhauer, Jeff</b>		<b>Thu 9/27/2012</b>	<b>14.00 Hrs</b>
<b>Clock In: 6:11 PM</b>	<b>Clock Out: 8:11 AM</b>		 <a href="#">Edit</a>
<b>Cash Tips: \$0.00</b>	<b>Labor Cost: \$180.00</b>		 <a href="#">Delete</a>
<b>Overtime Hours 1: 4.00</b>	<b>Overtime Hours 2: 2.00</b>		

#### Time Sheet Editor

Boomhauer, Jeff 14.00 Total Hours									
Date	Job	Clock In	Clock Out	Cash Tips	Hrly Rate	Reg Hours	OT Hours 1	OT Hours 2	Labor Cost
9/27/2012	General Manager	6:11:34 PM	8:11:39 AM	.00	10.00	8.00	4.00	2.00	\$180.00
Jeff Boomhauer Totals: 14.00 Total Hours				\$0.00		8.00	4.00	2.00	\$180.00

#### Employee Hours Report

## 17.8 Fingerprint Login

AmigoPOS includes an integrated fingerprint management system designed specifically for the Digital Persona U-R-U 4500 (and 4000) USB fingerprint reader, allowing enhanced security to eliminate the possibility of password or login id sharing among employees. Follow the steps in the [fingerprint reader setup](#) <sup>140</sup> topic to enable the interface and install the drivers before completing the steps below.

The screenshot shows the 'User Interface' configuration window. The 'Login' tab is selected, displaying the 'LOGIN SCREEN' settings. A table lists login methods with their status:

Login Buttons	
Number Pad	Yes
Card Swipe	Yes
Keyboard	Yes
<b>Fingerprint</b>	<b>Yes</b>
iButton	Yes

Below the table, a section titled 'Fingerprint' contains the instruction: 'Set to Yes to enable user login using the Digital Persona fingerprint reader'.

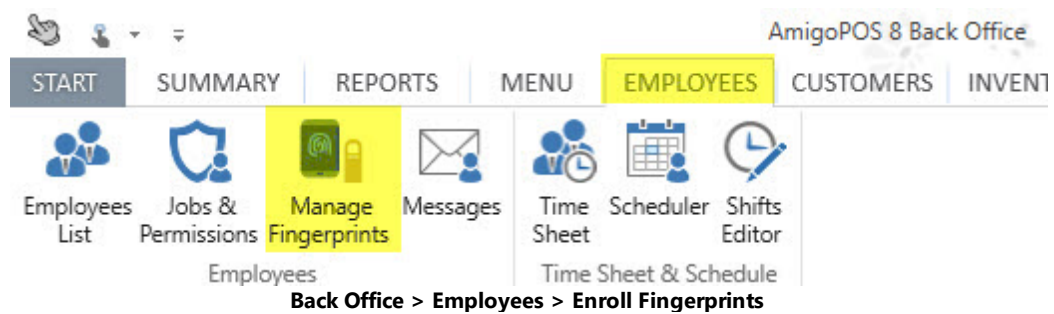
**User Login Configuration**

Begin by enabling Fingerprint Login in **Back Office/Settings/ Main Settings/User Interface**. Select Yes from the drop-down list next to the Fingerprint login method. At least one other login type should also be enabled until the fingerprint login system is configured so that back office can be accessed using a login id or user name/password.

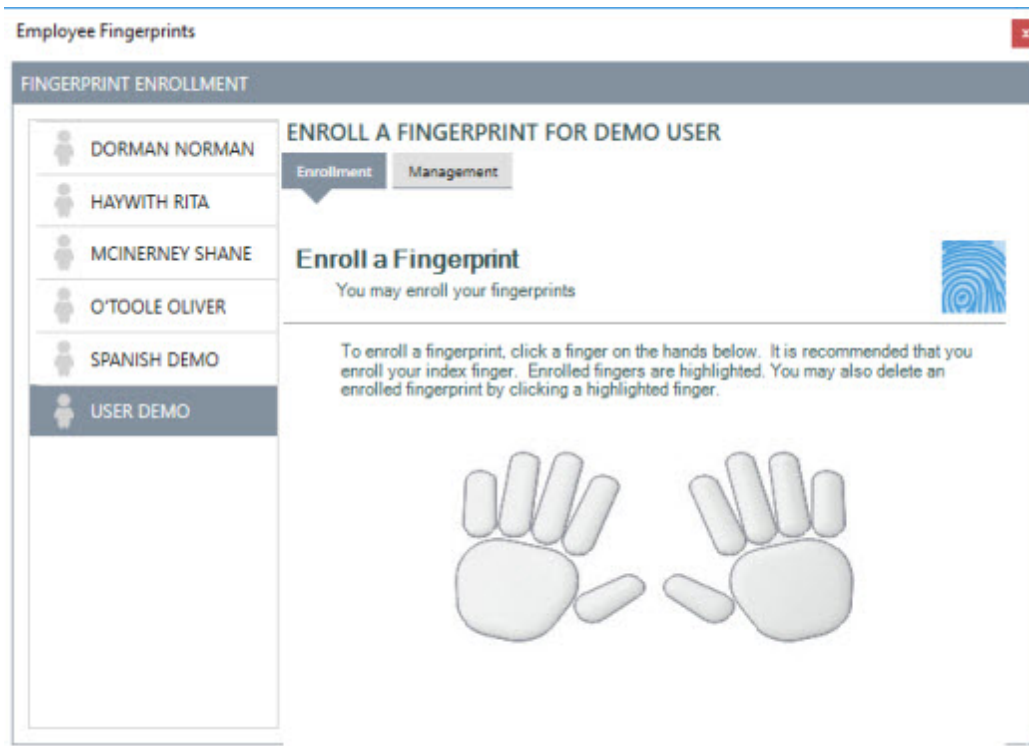


Fingerprint Login Enabled

Verify that the fingerprint login icon appears on the AmigoPOSlogin screen.

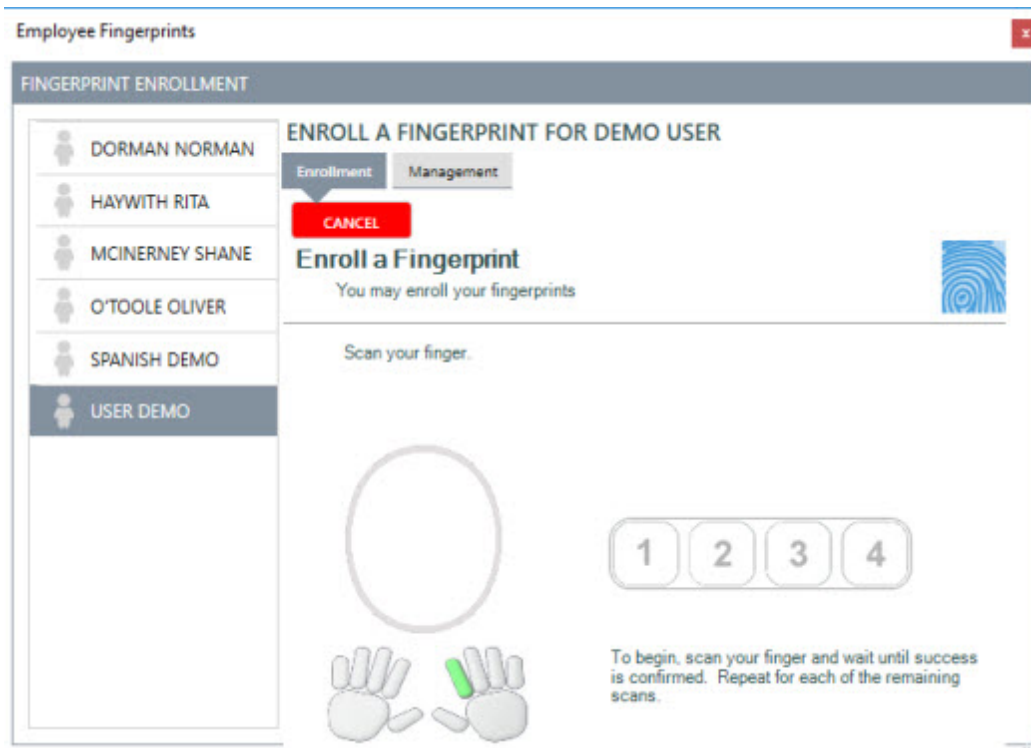


Open **Back Office>Employees** and click **Manage Fingerprints**. If the **Manage Fingerprints** menu item is not visible, enable the fingerprint reader as shown in the [fingerprint reader setup](#) <sup>140</sup> topic and restart back office.



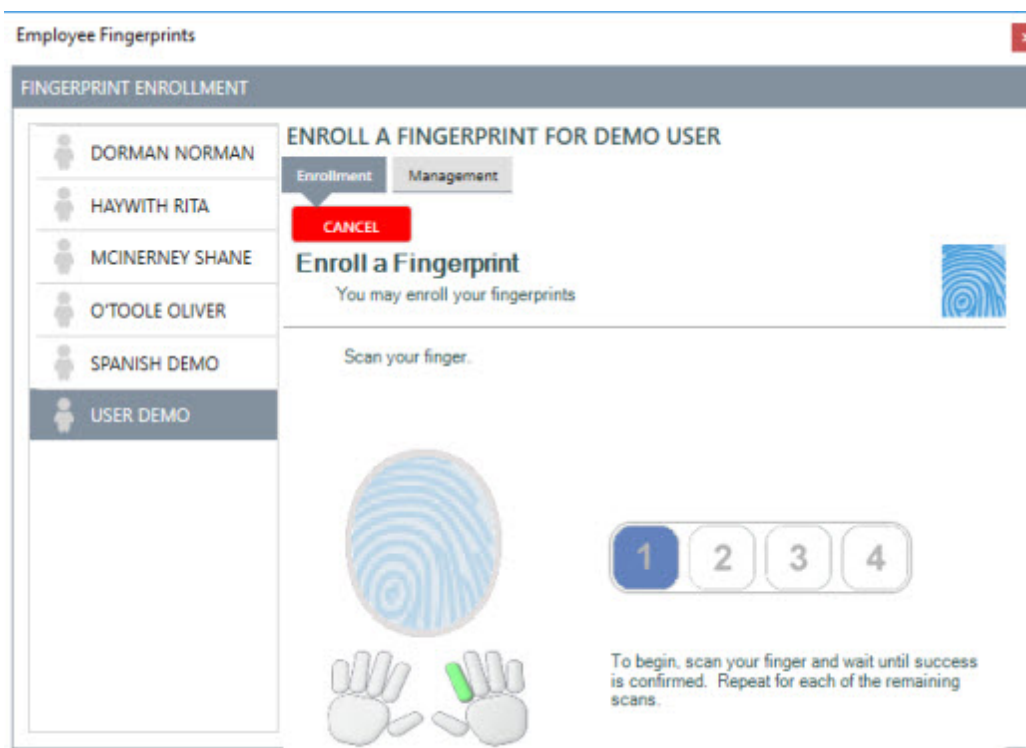
Selecting the Finger to Enroll in the Fingerprint Management Utility

The front of house pos requires exclusive access to the fingerprint reader to login employees, preventing back office from accessing the fingerprint reader. Shut down the front of house pos and start back office from the start menu (or desktop) shortcut to begin. A list of all employees appears on the left side of the screen. Select an employee and click on the finger to enroll. Although multiple fingers can be enrolled for each employee, only a single finger is required. For example, if your system utilizes an integrated fingerprint scanner located on the right side of the pos station, the right index fingerprint may be enrolled for each employee. Enrolling only a single fingerprint for each employee also ensures extremely fast fingerprint matching during login and that the database size is not unnecessarily increased.



Scanning the selected finger in the fingerprint management utility

After the finger is selected, instruct the employee to scan the selected finger 4 times, waiting for a confirmation of a successful scan between each scan attempt.



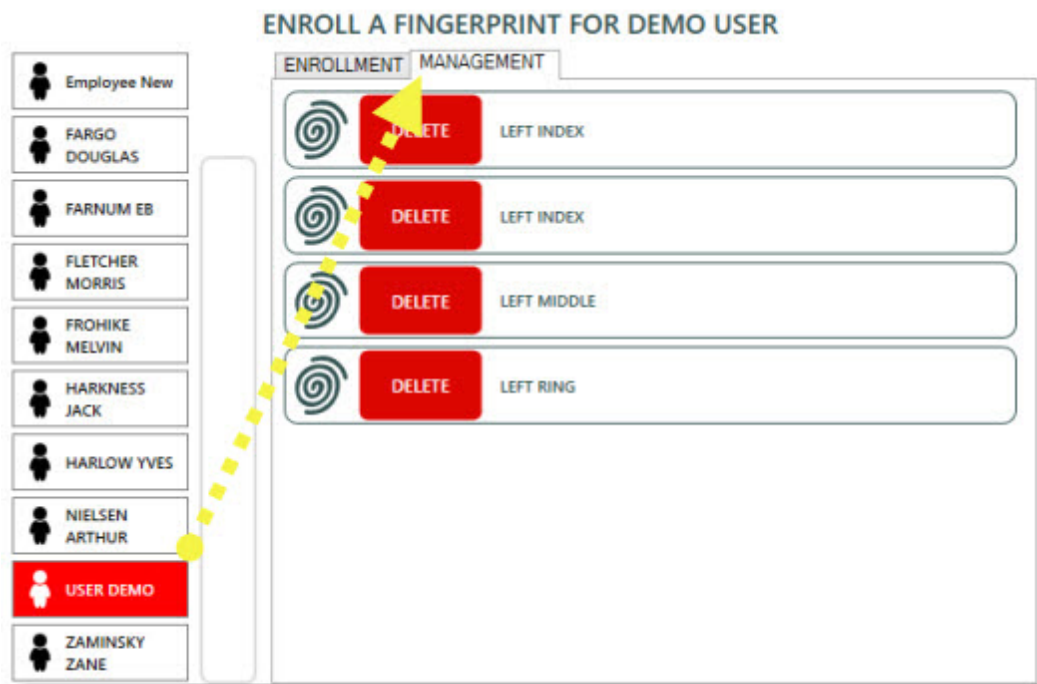
Four successful scans are required to enroll the finger

Each successful scan is indicated by a blue oval. When all four ovals are blue, the employee's scan is saved to the database.



An unsuccessful scan is indicated by a system beep

An unsuccessful scan is shown above. Unsuccessful scans may be caused by improper finger placement or scanning different fingers during the same finger enrollment. When the enrollment is unsuccessful, 4 new ovals will appear (numbered 5,6,7,8) so that the employee can try again.



Viewing the selected employee's enrolled fingerprints

Confirm that the fingerprint is stored in the database by clicking the Management tab after selecting the employee. All fingerprints stored for the selected employee appear on the list. If a mistake is made, select the fingerprint and click the red delete button to permanently delete the selected fingerprint entry.





Unsuccessful login attempt

If an employee that does not have an enrolled fingerprint attempts to login, the **FINGERPRINT NOT FOUND** message appears. Otherwise, the employee is logged in normally.

Part 18

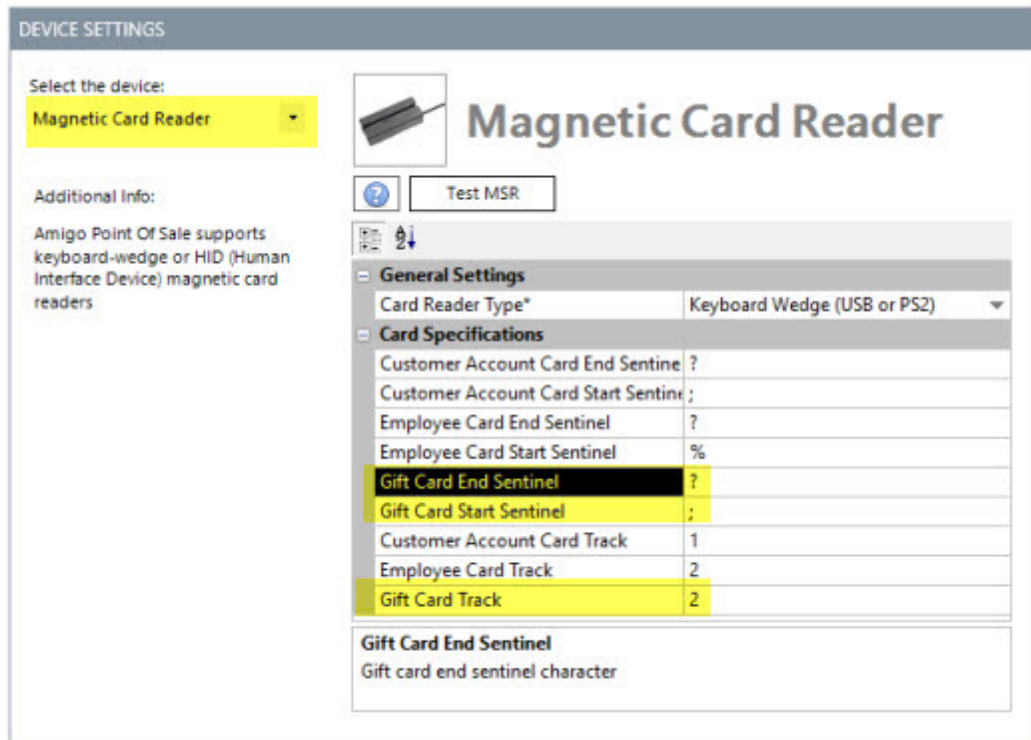
# Gift Cards

## 18 Gift Cards

### 18.1 Single Store

#### 18.1.1 Overview

Gift card settings may be configured in Back Office on any pos station. All settings are shared between pos stations except the magnetic card reader type, which may be different on each pos station. When a magnetic card reader is not used to read gift cards, the card reader settings may be ignored.



**DEVICE SETTINGS**

Select the device:  
Magnetic Card Reader

Additional Info:  
Amigo Point Of Sale supports keyboard-wedge or HID (Human Interface Device) magnetic card readers

**Magnetic Card Reader**

Test MSR

General Settings	
Card Reader Type*	Keyboard Wedge (USB or PS2)
Card Specifications	
Customer Account Card End Sentinel	?
Customer Account Card Start Sentinel	;
Employee Card End Sentinel	?
Employee Card Start Sentinel	%
Gift Card End Sentinel	?
Gift Card Start Sentinel	;
Customer Account Card Track	1
Employee Card Track	2
Gift Card Track	2

**Gift Card End Sentinel**  
Gift card end sentinel character

Back Office>Settings>Peripherals

The default expiration date setting is shown below. This value can be changed at the time the card is issued. Enter the number of days as a positive whole number.

**ALL PROGRAM SETTINGS**

Settings displayed on this screen are stored in the database and apply to all pos stations and back office workstations. Refer to the Peripheral or Main Settings screens for categorized settings and expanded descriptions.

**All Categories** ▼

**Numeric Settings** ▼

**ADD NEW SETTINGS**

**Gift Card Track** 2

Track number to read for obtaining gift card id

**Gift Card Valid Days** 365

Enter the default value in days for which new gift card is valid. The value can be changed when activating a new gift card

**Back Office/Settings/All Program Settings**

### Gift Card Configuration

Gift cards with a magnetic strip may contain the data on Track 1, 2 or 3. Your magnetic card reader must be capable of reading the track that is encoded with the card number. For example, a 3-track magnetic card reader is required to read a card where the gift card number is encoded on track 3. Most users choose to encode cards on track 1 or 2. When ordering gift cards, ensure that the gift card number is preceded by a start sentinel and ended with an end sentinel. For example, card number 123456 with a start sentinel ; (semicolon) and end sentinel ? (question mark), will appear as ;123456? when swiped. In Back Office/Settings/Peripherals/, enter the value of the track, start sentinel and end sentinel. All gift cards must use the same start and end sentinels to be read properly by a magnetic card reader. In addition, you may also request that the card number is printed on the card so that the card number can be entered manually in case the magnetic stripe becomes damaged or otherwise unreadable.

The value initially shown for the expiration date may be changed in Back office - Program Setup - All Settings by selecting Numeric Settings from the drop-down list and entering the number of days that the gift card should be valid next to the **Gift Card Days Valid** field. This value can be changed for an individual card when selling the gift card, as shown below, or in Back Office - Program Setup - Gift Cards.



Sell a New Gift Card

### Gift Card Sales

To sell a new (previously unused) gift card, press the gift card button on the start screen and press the **NEW GIFT CARD** button. Swipe the card or enter the card number manually. Enter the expiration date and initial value of the card. Press the **PROCESS** button to create the new gift card. You should then continue to the settlement screen to accept payment for the card. Note that a new order is started whenever a new gift card is sold. The order may be recalled to add additional items or can be settled immediately. If a single customer purchases multiple gift cards and wants to pay for all of them at one time, create the gift cards and then combine the orders.



**Add Value to an Existing Gift Card**

Press the ADD VALUE button add value to a gift card. Enter the amount to add and press the PROCESS button. Note that a new order is started whenever value is added to a gift card.



**Print Gift Card Transaction History**

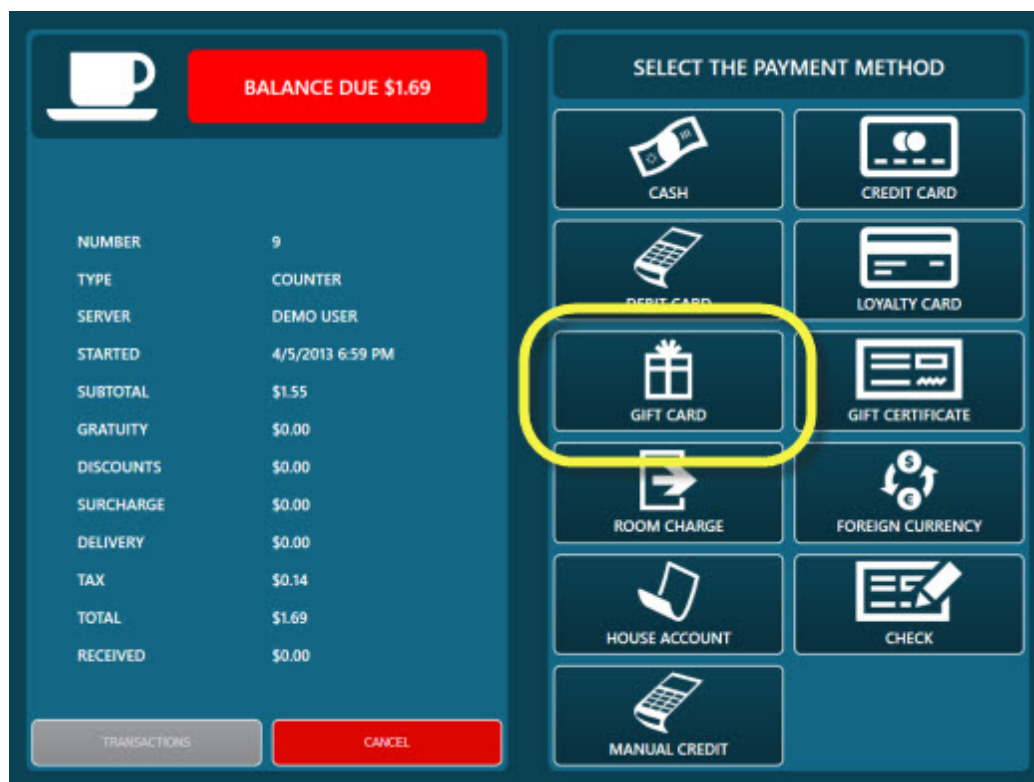
Press the **PRINT STATUS** button to view a gift card's complete transaction history. The data is sent to the local receipt printer.



**Disable a Gift Card**

Press the **DISABLE CARD** button to disable (VOID) a gift card. Disabling a card prevents the card from being used, but the transaction history is retained.





Order Settlement Using Gift Card Payment Method

To settle an order using a gift card, press the **SETTLE** button, select the order to settle and select the **GIFT CARD** payment type.

**BALANCE DUE \$1.69**

NUMBER	9
TYPE	COUNTER
SERVER	DEMO USER
STARTED	4/5/2013 6:59 PM
SUBTOTAL	\$1.55
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.14
TOTAL	\$1.69
RECEIVED	\$0.00

TRANSACTIONS CANCEL

**GIFT CARD TRANSACTION**

ENTER THE GIFT CARD ID OR SWIPE THE CARD

12345

CHANGE PAYMENT METHOD

1 2 3

4 5 6

7 8 9

0

▶

**Swipe the Gift Card or Enter the Gift Card Number**

Swipe the card or enter the gift card number to continue. Entering the number for a disabled or invalid gift card will generate an error message.

GIFT CARD #12345	
CARD ID	12345
PURCHASED	4/9/2013
START AMOUNT	\$50.00
EXPIRES	NEVER
AVAILABLE BALANCE	\$50.00
<a href="#">PRINT SUMMARY</a>	

NUMBER	9
TYPE	COUNTER
SERVER	DEMO USER
STARTED	4/5/2013 6:59 PM
SUBTOTAL	\$1.55
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.14
TOTAL	\$1.69
RECEIVED	\$0.00

<a href="#">TRANSACTIONS</a>		<a href="#">CANCEL</a>	
------------------------------	--	------------------------	--

GIFT CARD ID 12345	
ENTER THE AMOUNT (UP TO \$1.69)	
<a href="#">CHANGE PAYMENT METHOD</a>	
\$1	1
\$5	2
\$10	3
\$20	4
\$50	5
\$100	6
EXACT CHANGE	7
NEXT \$ AMOUNT	8
	9
	0
	<a href="#">PLAY</a>

**Enter the Transaction Amount**

Enter the amount to charge. The gift card's value is shown above the on-screen number pad. The amount must be greater than zero, less than or equal to the balance due, and less than or equal to the gift card's current value.

**NO BALANCE DUE**

GIFT CARD #12345

CARD ID	12345
PURCHASED	4/9/2013
START AMOUNT	\$50.00
EXPIRES	NEVER
AVAILABLE BALANCE	\$48.31

PRINT SUMMARY

NUMBER	9
TYPE	COUNTER
SERVER	DEMO USER
STARTED	4/5/2013 6:59 PM
SUBTOTAL	\$1.55
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.14
TOTAL	\$1.69
RECEIVED	\$1.69

TRANSACTIONS CANCEL

**TRANSACTION COMPLETE**

TRANSACTION AMOUNT \$1.69

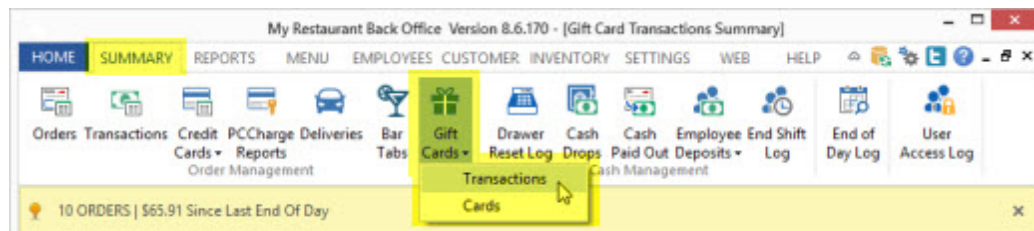
**NO CHANGE DUE**

ADDITIONAL PAYMENT PRINT RECEIPT

FINISHED LOGOUT

Transaction Complete

Confirm the transaction details and press the green button to complete the transaction.



Back Office/Summary/Gift Cards

<div>Update [F5]</div> <div>Date Range</div> <div> <input checked="" type="radio"/> Current Business Day  <input type="radio"/> Specify Dates            From: 8/7/2011            To: 8/14/2011         </div> <div>Data Filters</div> <div>           *Expanded View            *All Cashiers            *Include Voids            *Return All Rows         </div> <div>Advanced Filters</div> <div>           Gift Card Transaction Id            =            Gift Card Transaction Amount            &gt;=         </div> <div>Tools</div>		<div> <b>Gift Card Transactions Summary</b>            Date Range: 8/14/2011 6:00 AM - 8/15/2011 5:59 AM            7 rows returned with no data filters applied  <a href="#">Print List</a> </div> <table> <tr> <td>GC Transaction #1</td><td><a href="#">Order #1</a></td><td>Add Value: +\$25.00</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Cashier: Boomhauer, Jeff</td><td>Gift Card Number: 12345</td><td>Date: 8/14/2011 4:03:00 PM</td><td><a href="#">Edit</a></td></tr> <tr> <td>GC Transaction #2</td><td><a href="#">Order #2</a></td><td>Add Value: +\$50.00</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Cashier: Boomhauer, Jeff</td><td>Gift Card Number: 54321</td><td>Date: 8/14/2011 4:04:00 PM</td><td><a href="#">Edit</a></td></tr> <tr> <td>GC Transaction #3</td><td><a href="#">Order #3</a></td><td>Add Value: +\$75.00</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Cashier: Boomhauer, Jeff</td><td>Gift Card Number: 98745</td><td>Date: 8/14/2011 4:04:00 PM</td><td><a href="#">Edit</a></td></tr> <tr> <td>GC Transaction #4</td><td><a href="#">Order #4</a></td><td>Add Value: +\$100.00</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Cashier: Boomhauer, Jeff</td><td>Gift Card Number: 78912</td><td>Date: 8/14/2011 4:05:00 PM</td><td><a href="#">Edit</a></td></tr> <tr> <td>GC Transaction #5</td><td><a href="#">Order #5</a></td><td>Sale Amount: -\$1.31</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Cashier: Boomhauer, Jeff</td><td>Gift Card Number: 12345</td><td>Date: 8/14/2011 4:05:00 PM</td><td><a href="#">Edit</a></td></tr> <tr> <td>GC Transaction #6</td><td><a href="#">Order #6</a></td><td>Sale Amount: -\$1.31</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Cashier: Boomhauer, Jeff</td><td>Gift Card Number: 54321</td><td>Date: 8/14/2011 4:05:00 PM</td><td><a href="#">Edit</a></td></tr> </table>		GC Transaction #1	<a href="#">Order #1</a>	Add Value: +\$25.00	<a href="#">Print Status</a>	Cashier: Boomhauer, Jeff	Gift Card Number: 12345	Date: 8/14/2011 4:03:00 PM	<a href="#">Edit</a>	GC Transaction #2	<a href="#">Order #2</a>	Add Value: +\$50.00	<a href="#">Print Status</a>	Cashier: Boomhauer, Jeff	Gift Card Number: 54321	Date: 8/14/2011 4:04:00 PM	<a href="#">Edit</a>	GC Transaction #3	<a href="#">Order #3</a>	Add Value: +\$75.00	<a href="#">Print Status</a>	Cashier: Boomhauer, Jeff	Gift Card Number: 98745	Date: 8/14/2011 4:04:00 PM	<a href="#">Edit</a>	GC Transaction #4	<a href="#">Order #4</a>	Add Value: +\$100.00	<a href="#">Print Status</a>	Cashier: Boomhauer, Jeff	Gift Card Number: 78912	Date: 8/14/2011 4:05:00 PM	<a href="#">Edit</a>	GC Transaction #5	<a href="#">Order #5</a>	Sale Amount: -\$1.31	<a href="#">Print Status</a>	Cashier: Boomhauer, Jeff	Gift Card Number: 12345	Date: 8/14/2011 4:05:00 PM	<a href="#">Edit</a>	GC Transaction #6	<a href="#">Order #6</a>	Sale Amount: -\$1.31	<a href="#">Print Status</a>	Cashier: Boomhauer, Jeff	Gift Card Number: 54321	Date: 8/14/2011 4:05:00 PM	<a href="#">Edit</a>
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Cashier: Boomhauer, Jeff	Gift Card Number: 54321	Date: 8/14/2011 4:05:00 PM	<a href="#">Edit</a>																																																

Gift Card Transactions

Gift Card transactions can be viewed in Back Office/Settings/ Main Settings/GIFT CARDS by clicking the **Transactions** tab. The transactions are sorted by gift card number, and transactions can be voided by selecting the transaction and then selecting **VOID** from the **Select an action...** drop-down list.

<div>Update [F5]</div> <div>Date Sold</div> <div> <input checked="" type="radio"/> Current Business Day  <input type="radio"/> Specify Dates            From: 8/7/2011            To: 8/14/2011         </div> <div>Data Filters</div> <div>           *Expanded View            Boomhauer, Jeff            Exclude Voided Cards            First 10 Rows         </div> <div>Advanced Filters</div> <div>           Gift Card Id            =         </div> <div>Tools</div>		<div> <b>Gift Cards Summary</b>            Date Sold: 8/14/2011 6:00 AM - 8/15/2011 5:59 AM            4 rows returned with the following data filters: First 10 Rows    Sold By: Boomhauer, Jeff    Card Voided=False  <a href="#">Print List</a> </div> <table> <tr> <td>Gift Card Id: 1</td><td>Expires: 8/12/2012</td><td>Available Balance: \$23.69</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Gift Card Number: 12345</td><td>Date Sold: 8/14/2011 4:03:00 PM</td><td>Sold By: Boomhauer, Jeff</td><td><a href="#">Edit</a></td></tr> <tr> <td>Gift Card Id: 2</td><td>Expires: 8/12/2012</td><td>Available Balance: \$48.69</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Gift Card Number: 54321</td><td>Date Sold: 8/14/2011 4:04:00 PM</td><td>Sold By: Boomhauer, Jeff</td><td><a href="#">Edit</a></td></tr> <tr> <td>Gift Card Id: 3</td><td>Expires: 8/12/2012</td><td>Available Balance: \$73.42</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Gift Card Number: 98745</td><td>Date Sold: 8/14/2011 4:04:00 PM</td><td>Sold By: Boomhauer, Jeff</td><td><a href="#">Edit</a></td></tr> <tr> <td>Gift Card Id: 4</td><td>Expires: 8/12/2012</td><td>Available Balance: \$100.00</td><td><a href="#">Print Status</a></td></tr> <tr> <td>Gift Card Number: 78912</td><td>Date Sold: 8/14/2011 4:05:00 PM</td><td>Sold By: Boomhauer, Jeff</td><td><a href="#">Edit</a></td></tr> </table>		Gift Card Id: 1	Expires: 8/12/2012	Available Balance: \$23.69	<a href="#">Print Status</a>	Gift Card Number: 12345	Date Sold: 8/14/2011 4:03:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>	Gift Card Id: 2	Expires: 8/12/2012	Available Balance: \$48.69	<a href="#">Print Status</a>	Gift Card Number: 54321	Date Sold: 8/14/2011 4:04:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>	Gift Card Id: 3	Expires: 8/12/2012	Available Balance: \$73.42	<a href="#">Print Status</a>	Gift Card Number: 98745	Date Sold: 8/14/2011 4:04:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>	Gift Card Id: 4	Expires: 8/12/2012	Available Balance: \$100.00	<a href="#">Print Status</a>	Gift Card Number: 78912	Date Sold: 8/14/2011 4:05:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>
Gift Card Id: 1	Expires: 8/12/2012	Available Balance: \$23.69	<a href="#">Print Status</a>																																
Gift Card Number: 12345	Date Sold: 8/14/2011 4:03:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>																																
Gift Card Id: 2	Expires: 8/12/2012	Available Balance: \$48.69	<a href="#">Print Status</a>																																
Gift Card Number: 54321	Date Sold: 8/14/2011 4:04:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>																																
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Gift Card Number: 98745	Date Sold: 8/14/2011 4:04:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>																																
Gift Card Id: 4	Expires: 8/12/2012	Available Balance: \$100.00	<a href="#">Print Status</a>																																
Gift Card Number: 78912	Date Sold: 8/14/2011 4:05:00 PM	Sold By: Boomhauer, Jeff	<a href="#">Edit</a>																																

Gift Cards List

Gift Card transactions can be viewed in Back Office/Settings/ Main Settings/GIFT CARDS by clicking the **Gift Cards** tab.

## 18.1.2 Sample Gift Card Configuration

Gift, loyalty and employee access cards can be issued and managed in house so there is no need for an external program. The following guidelines should be used when ordering cards and apply to gift cards, loyalty cards and employee access cards. This topic does not apply to the GIFTePay gift card interface, as pre-encoded cards are provided by the merchant account provider.

Cards must be encoded on track1 **AND** track 2, similar to the example below. Track 3 can also be used, but not necessary. If using a 3rd party to encode your cards, obtain & test a sample card before all of the cards are encoded. The card printing company can test a card before encoding the entire batch by downloading an evaluation version of AmigoPOS. Be sure to request a test card to verify that it is properly encoded before ordering the cards.

+++++  
Sample track1&2 for card #10000105:

**%G5 GIFT OR LOYALTY CARD 10000105?;10000105?**

In the example shown above:

- track 1 start sentinel is %
- track 1 end sentinel is ?
- track 1 data is **G5 GIFT OR LOYALTY CARD 10000105**
- track 2 start sentinel is ;
- track 2 end sentinel is ?
- track 2 data is **10000105**

The tracks and start/end sentinels are configured in Back Office/Settings/Peripherals/Magnetic Card Reader as described in the [magnetic card reader configuration](#) help topic.

## 18.2 Amigo Pos Cloud Service

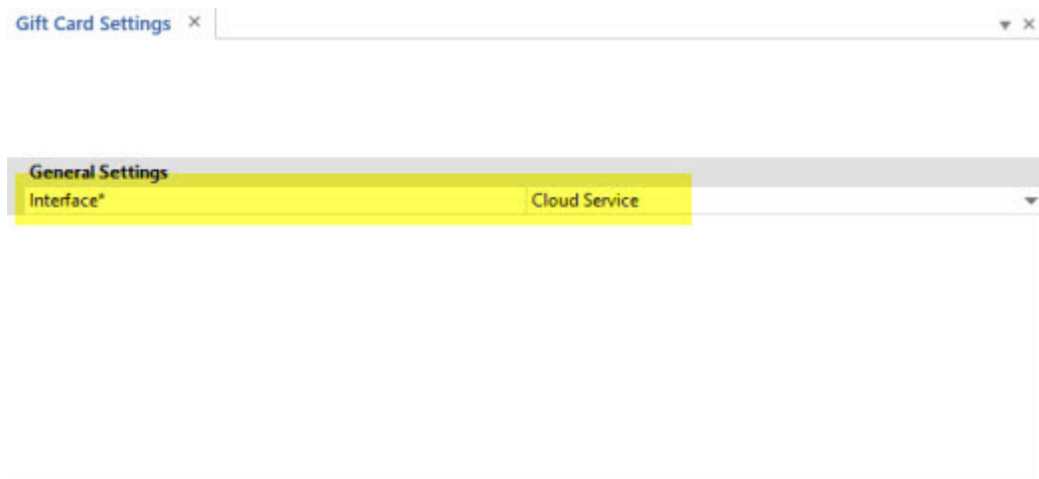
The gift and loyalty card cloud service is useful for businesses with multiple locations so that customers can use cards at any location. The service is hosted on Microsoft Windows Azure Cloud Servers with low latency and built-in redundancy for maximum uptime and unsurpassed reliability.

Complete the following steps to begin using the gift card service:

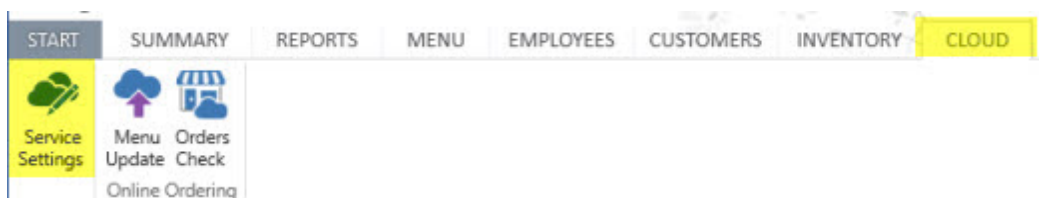
1. Submit the subscription signup to receive credentials and a secure service url.
2. Obtain gift cards with either an encoded magnetic strip or barcode
3. Enter back office settings and verify that the connection is successful
4. Review the gift and loyalty card transaction procedures before processing live transactions

### Settings

Open **Back Office>Settings>Gift Cards** and set the interface to **Cloud Service**.



Open **Back Office>Cloud>Service Settings**.



Set the login credentials, service url and merchant/store id as per the subscription confirmation email. Note that all stores shared the same merchant id, but each store must have a unique store id. Using the same store id for multiple stores will result in service disruption due to the cloud service IP address verification performed on each transaction.

Usage

## 18.3 Verifone Point

### 18.3.1 Overview

AmigoPOS includes a fully integrated interface to the Verifone Point gift card service, which offers support for most major gift card processors. Contact your Verifone Point account representative for information regarding specific gift card processors.

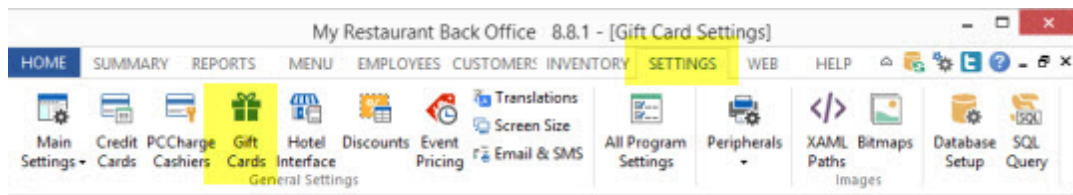
Although the AmigoPOS interface to the Verifone Point gift card service supports both M\* and V\* series devices, the AmigoPOS Verifone Point credit card interface currently supports only V\* devices. However, AmigoPOS has the capability to connect to separate devices for gift card and credit card transactions for businesses that prefer to use an M\* series devices for gift card transactions.

The following transactions are available. Note that gift card transactions are processor dependent. Not all transactions are supported by all gift card processors.

- **Activate:** This command activates a gift card with an initial (non-zero) balance.
- **Add Value:** This command adds value to a Gift card.
- **Balance Inquiry:** This command checks the balance on a Gift card.
- **Close/Cash Out:** This command cashes out a Gift card at the Gift Payment Processor. Funds of entire balance redeemed. Funds on card = \$0.00.
- **Deactivate:** This command deactivates an activated Gift card. It is intended for a lost/stolen gift card. Funds on card = \$0.00.

### 18.3.2 Settings

#### Back Office Settings



Settings\Gift Cards

The screenshot shows a window titled "Gift Card Settings" with a close button (X). Inside, there's a "General Settings" section with a dropdown menu for "Interface\*" set to "Verifone Point". Below this is the "Verifone Point Settings" section, which contains a table with the following settings:

*Shared Credit Card Device	No
*Device IP Address	192.168.1.4
*Device Port	5015
*Override Duplicate	No

At the bottom of the window, there's a section titled "Interface\*" with the instruction "Select the gift card processing method".

#### Verifone Point Gift Card Settings

The following settings are used to configure the Verifone Point interface:

- **Interface:** Set to Verifone Point
- **Shared Credit Card Device:** Set to Yes if the same device is used to process credit card and debit card transactions. Set to No if a separate device is used to process gift card transactions.
- **Device IP Address:** Required only if the Shared Credit Card Device setting is set to Yes.
- **Device Port:** Required only if the Shared Credit Card Device setting is set to Yes. The factory default port for Verifone Point devices is 5015.
- **Override Duplicate:** Set to Yes to disable checking for transactions of the same amount charged to the same card number in the same batch.

## 18.3.3 Usage

### 18.3.3.1 Gift Cards Screen

Login and press Gift Cards on the right to access the gift cards screen. Note that the gift cards button may be hidden depending on the logged in users permissions as described [below](#) <sup>746</sup>.

The following functions are available on the gift cards screen:

- **Activate:** <sup>747</sup> Activate a new gift card
- **Add Value:** <sup>748</sup> Add value to a previously activated gift card
- **Balance:** <sup>749</sup> View and print the available balance on a gift card
- **Cash Out:** <sup>749</sup> Cash out (redeem) the gift card balance for cash
- **Deactivate:** <sup>750</sup> Permanently deactivate a lost or stolen gift cards
- **Log:** <sup>750</sup> View a list of recent gift card transactions





Gift Cards Screen

### Employee Permissions

Access to the gift cards screen and individual gift card functions are determined by the logged in user's [permissions](#)<sup>[698]</sup> with the exception of the gift card balance and transaction log, which are available to all users with access to the gift cards screen. The following permissions are used to restrict access to individual gift card functions:

- **Allow Gift Cards:** User can access the gift cards screen
- **Allow Gift Card Activate:** User can activate new gift cards
- **Allow Gift Card Add Value:** User can add value to previously activated gift cards
- **Allow Gift Card Cash Out:** User can cash out (redeem) gift card balance for cash
- **Allow Gift Card Deactivate:** User can deactivate lost or stolen gift cards

The screenshot shows a software window titled "Jobs & Permissions" with a close button (X). At the top, there are buttons for "?", "Delete Selected", "Add:" (with an empty input field), and "Show List". Below these, a dropdown menu shows "GENERAL MANAGER (32)". To the right, the text "GENERAL MANAGER (32) ASSIGNMENTS" is displayed. Below the dropdown, there is a "Default Order Type:" dropdown set to "None", a "Disable Job" checkbox, and an "Add employee to list..." dropdown with a "Remove" button. A list of permissions is shown on the left, with a yellow highlight on the first six items: "Allow Discounts", "Allow Gift Card Activate", "Allow Gift Card Add Value", "Allow Gift Card Cash Out", "Allow Gift Card Deactivate", and "Allow Gift Cards". Other permissions include "Allow Hold", "Allow House Accounts", "Allow Inventory Count", and "Allow Inventory Receive". On the right, a text box contains the text "USER, DEMO".

#### Gift Card Permissions

##### Activate

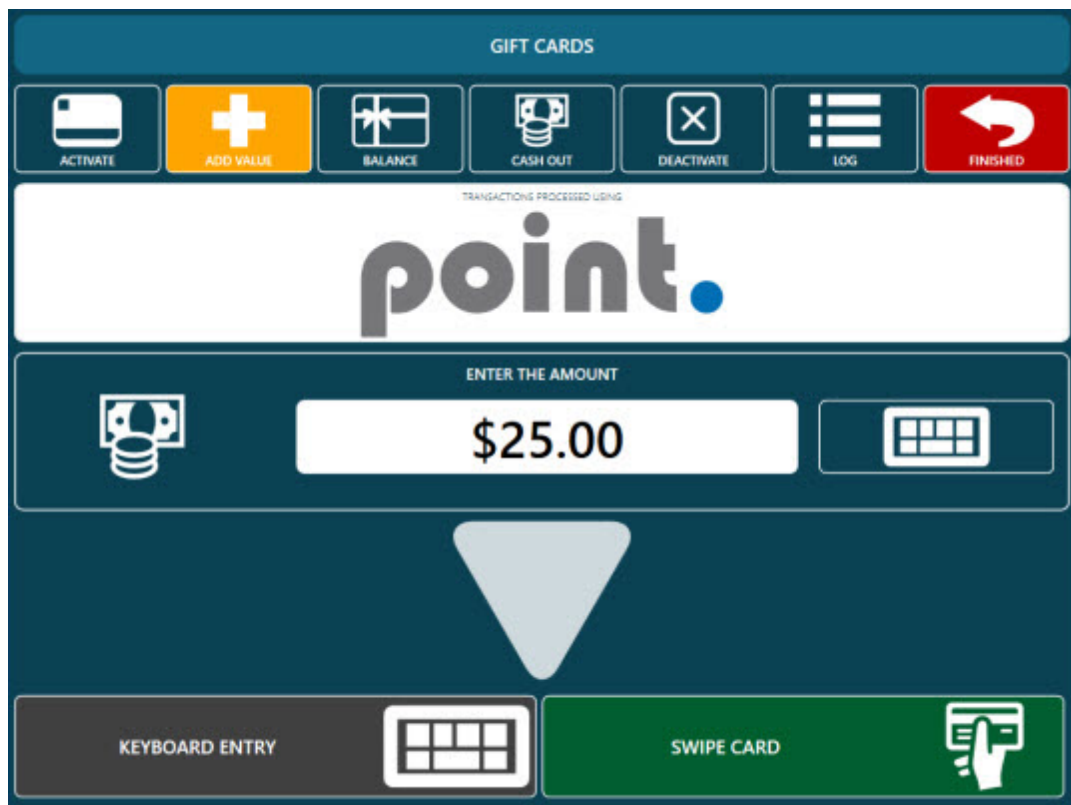
New gift cards are usually supplied by the payment processor and are pre-encoded with track 2 data. All cards have zero value before activation and a balance inquiry will result in a "Card Not Found" error. Press **ACTIVATE** and enter the gift card amount. Press **SWIPE CARD** to send the request to the Verifone Point device. Although the option to manually enter the gift card account number is available, gift cards with a damaged or otherwise unreadable magnetic stripe that have not been previously activated should be discarded.



#### Activate

##### Add Value

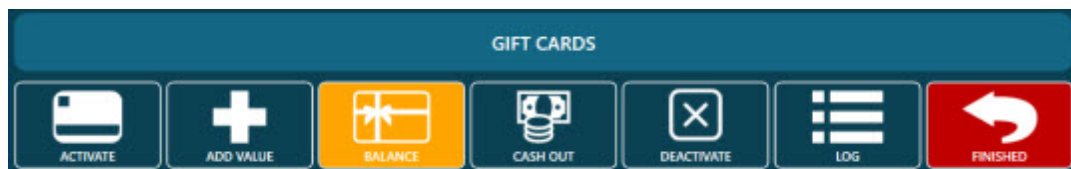
Additional funds can be added to a previously activated gift card by pressing ADD VALUE. Enter the amount to add and press SWIPE CARD to send the request to the Verifone Point device. If the gift card is unreadable due to a damaged magnetic stripe, press HAND KEYED to enter the account number manually.



Add Value

**Balance**

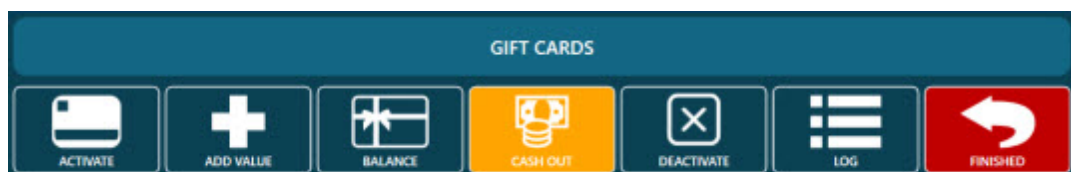
Press the BALANCE button to view or print the gift card's available balance.



Balance

**Cash Out**

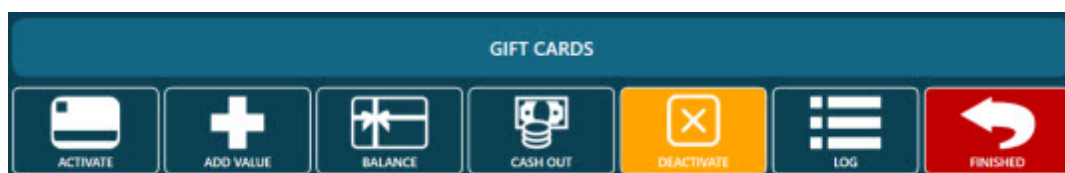
The available balance on the gift card can be redeemed for cash by pressing CASH OUT. A paid out transaction is entered for the remaining balance on the card and the cash drawer is opened automatically when a successful result is received from Verifone Point.



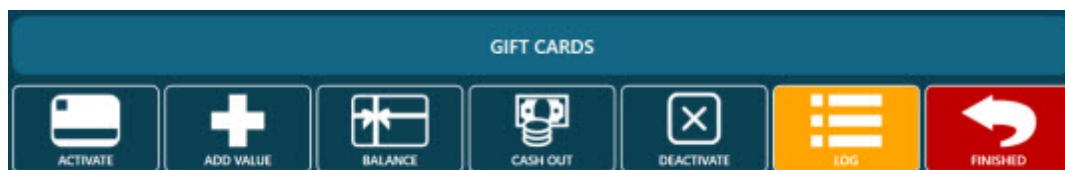
Cash Out

**Deactivate**

Lost or stolen cards can be permanently deactivated by pressing DEACTIVATE. A paid out transaction is entered for the remaining balance on the card and the cash drawer is opened automatically when a successful result is received from Verifone Point.

**Deactivate****Log**

The log maintains a list of XML requests sent to Verifone Point and XML responses received from Verifone Point. The log is useful for troubleshooting during initial setup.

**Log****18.3.3.2 Settle Screen**

Login to AmigoPOS, expand an order on the recall list and press SETTLE to open the order on the settle screen. Select the GIFT CARD payment method to continue.

**BALANCE DUE \$4.09**

NUMBER	4
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/20/2015 4:00 PM
SUBTOTAL	\$3.75
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.34
TOTAL	\$4.09
RECEIVED	\$0.00

TRANSACTIONS RECALL PRINT RECEIPT CANCEL

**SELECT THE PAYMENT METHOD**

- CASH
- CREDIT CARD
- DEBIT CARD
- LOYALTY CARD
- GIFT CARD**
- GIFT CERTIFICATE
- ROOM CHARGE
- FOREIGN CURRENCY
- HOUSE ACCOUNT
- CHECK
- MANUAL CREDIT

#### Gift Card Payment Method

Enter the transaction amount. The maximum transaction amount is limited to the balance due on the order. In the example below, the user is prevented from continuing because the transaction amount is larger than the balance due.

**BALANCE DUE \$4.09**

NUMBER	4
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/20/2015 4:00 PM
SUBTOTAL	\$3.75
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.34
TOTAL	\$4.09
RECEIVED	\$0.00

TRANSACTIONS RECALL PRINT RECEIPT CANCEL

**GIFT CARD TRANSACTION**

ENTER THE AMOUNT (UP TO \$4.09)

**\$4.10**

CHANGE PAYMENT METHOD

1 2 3

4 5 6

7 8 9

0

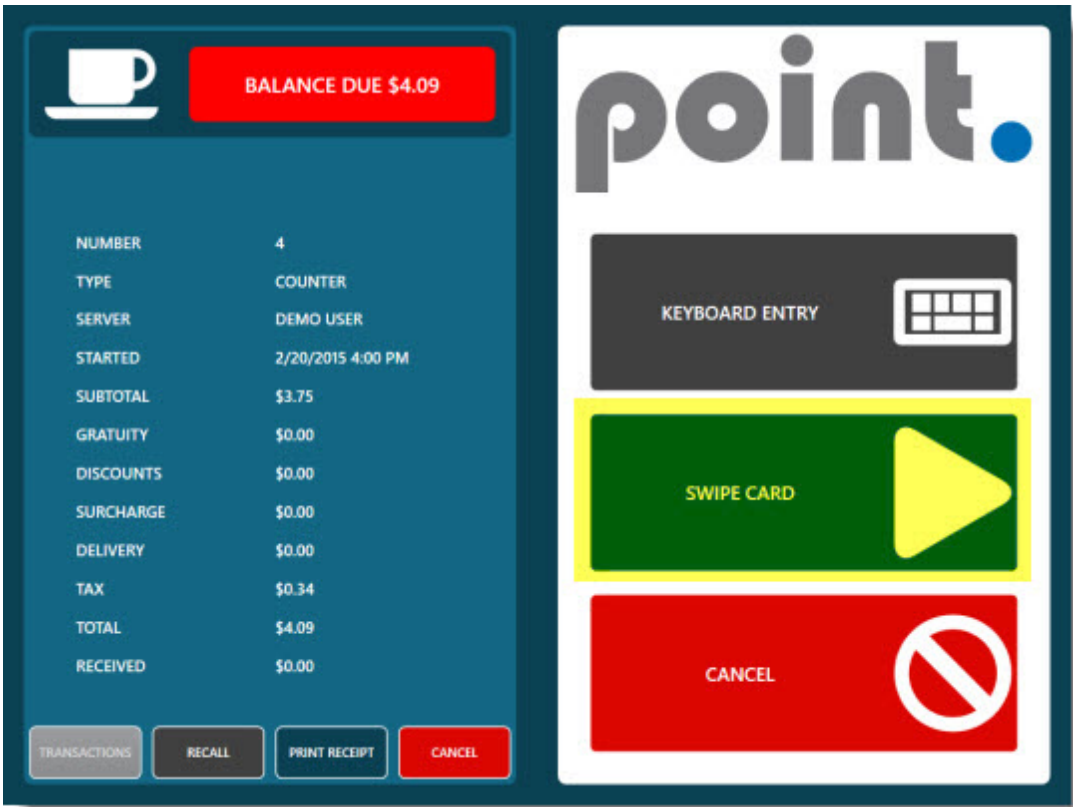
EXACT CHANGE

NEXT \$ AMOUNT

**▶**

#### Transaction Amount Entry

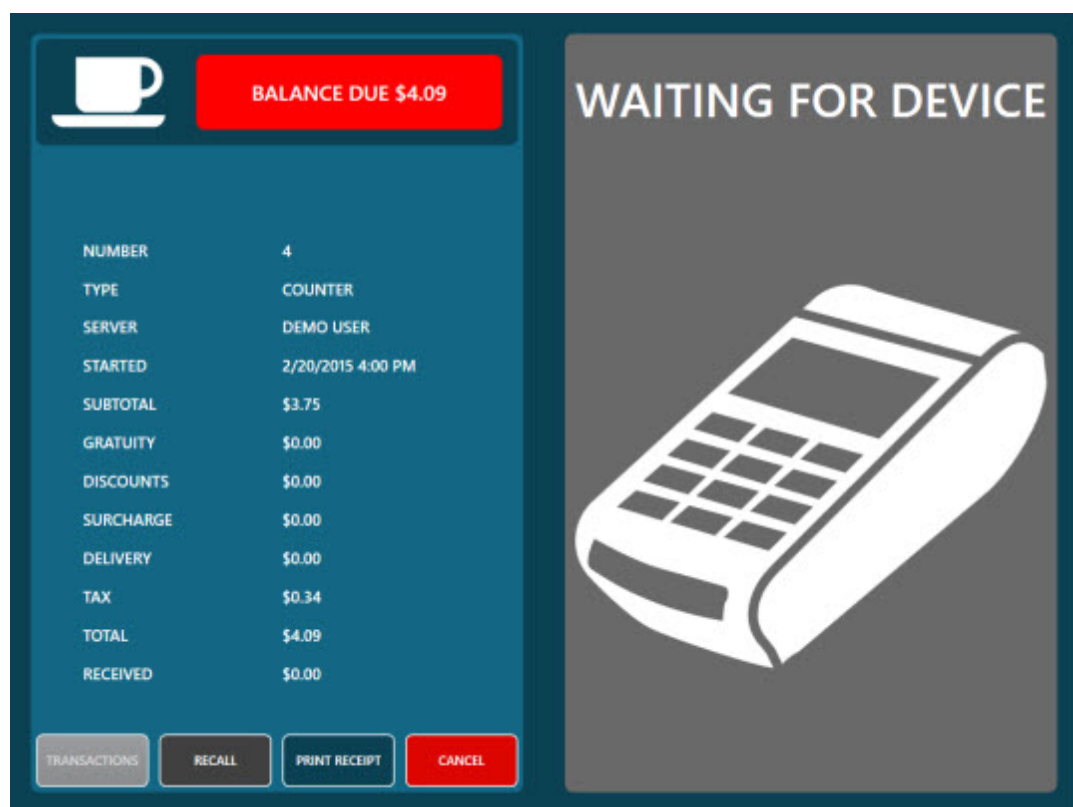
Press SWIPE CARD to send the request to the Verifone Point device. If the gift card is unreadable due to a damaged magnetic stripe, press HAND KEYED to enter the account number manually.



**Input Method Selection**

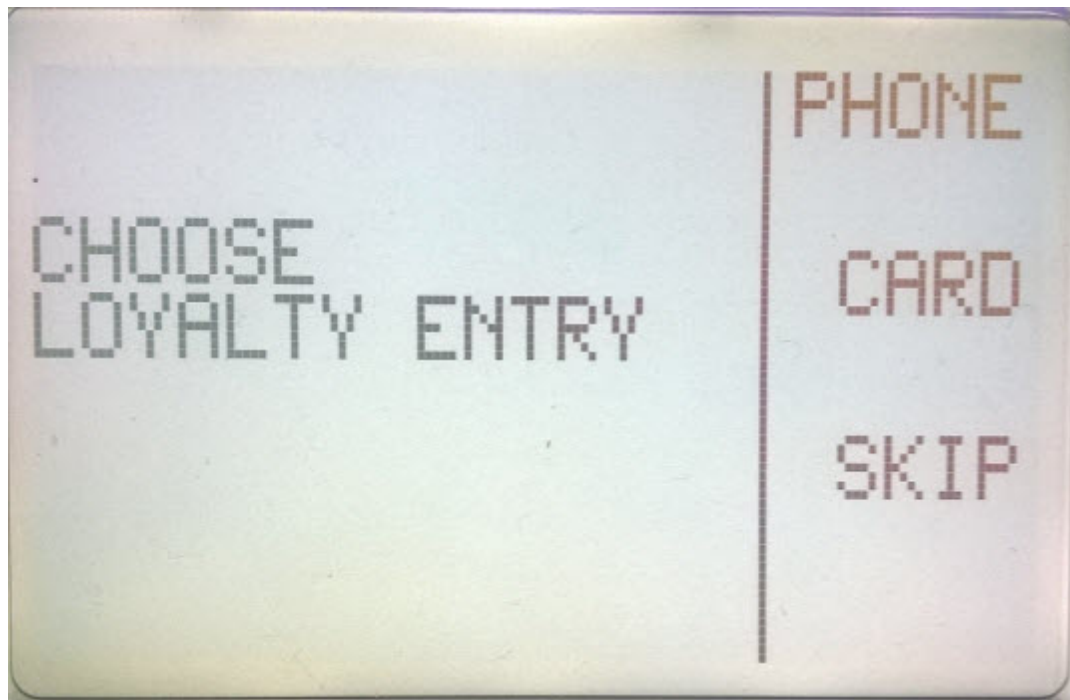
Allow up to 30 seconds to receive a response from the device after the card is swiped.





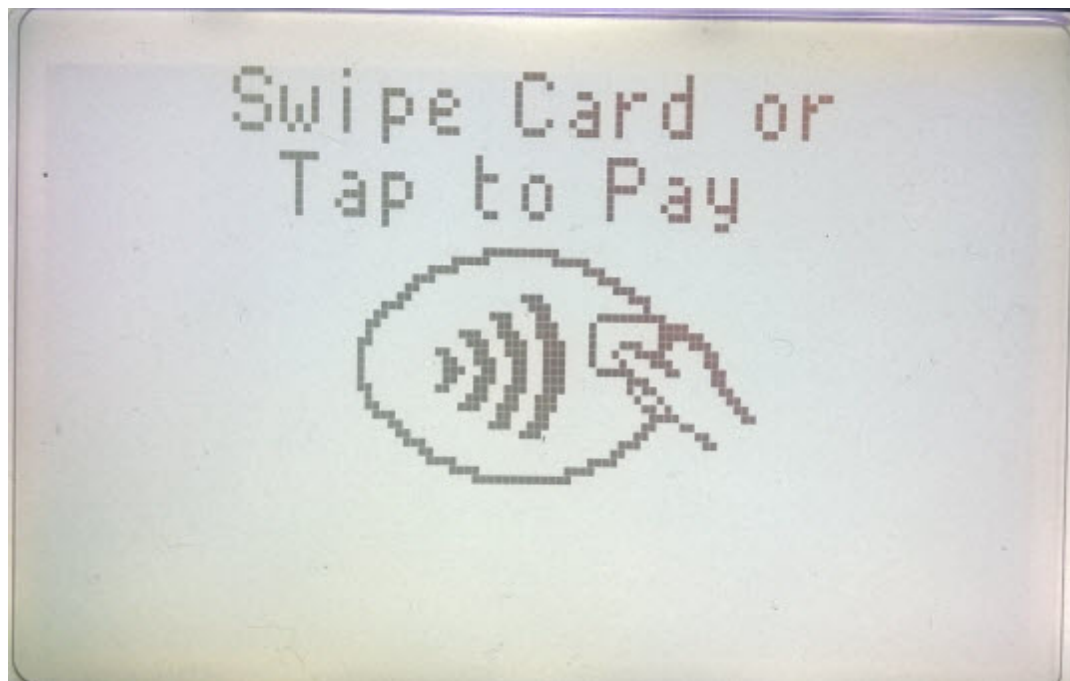
#### Waiting for Device

If enabled on the device, the loyalty card prompt will appear if the device is set to prompt for loyalty card input. If phone number is not entered or a loyalty card is not swiped, the loyalty card prompt will timeout in approximately 60 seconds and the card swipe prompt is displayed.



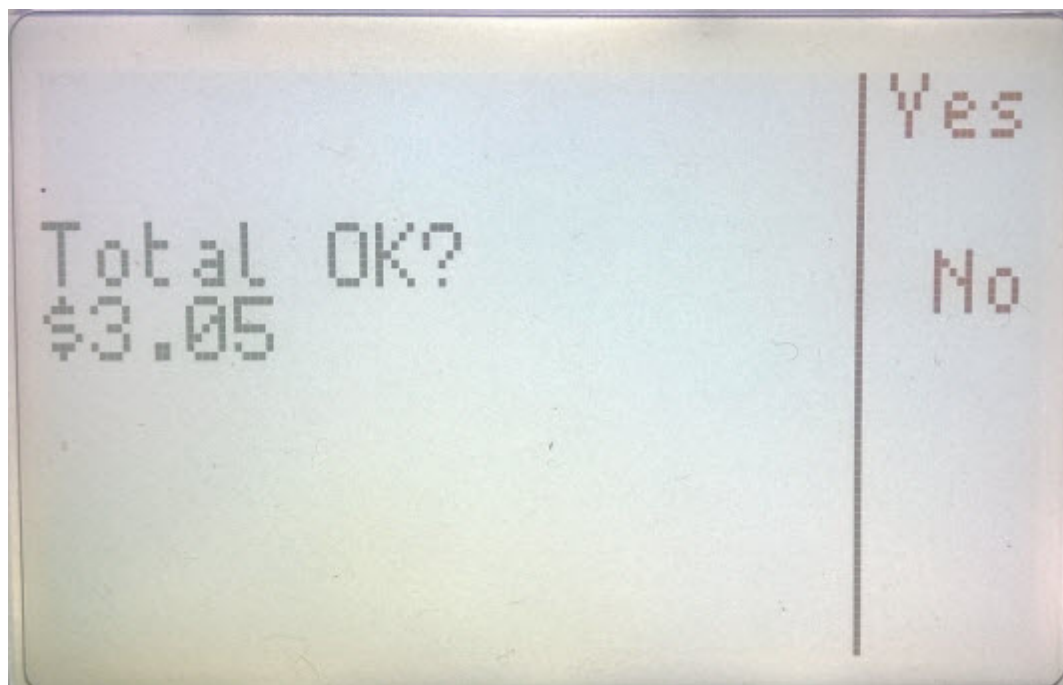
**Loyalty Prompt**

The card swipe prompt is displayed for approximately 90 seconds before timing out. If a card is not swiped, tapped or read within the timeout period, the transaction is automatically canceled.




**Card Swipe Prompt**

The total amount confirmation prompt is displayed when using the Sale/Add Tip method. If No is selected or Yes is not selected within 60-90 seconds, the transaction is automatically canceled.



**Charge Amount Confirmation Prompt**

A successful result is indicated by a dark green background on the response screen. Note that if the approved amount is different from the transaction amount, the background color is indigo. This may occur when a prepaid card with insufficient funds is used.




NO BALANCE DUE


NUMBER	4
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/20/2015 4:00 PM
SUBTOTAL	\$3.75
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.34
TOTAL	\$4.09
RECEIVED	\$4.09


TRANSACTIONS


TRANSACTION RESULTS


CAPTURED

PRINT RECEIPT

PRINT STATUS

FINISHED

LOGOUT



STATUS	CAPTURED
RESPONSE TEXT	CAPTURED
CTROUTD	SOS
ORDER NUMBER	4
REFERENCE	(206) Invalid Track 2
AMOUNT	\$4.09
BALANCE	\$43.66

Successful Gift Card Transaction

If the funds available on the gift card are less than the transaction amount, a partial approval message is returned by the payment processor. In the example below, the balance due on the order was \$25.25. After attempting a transaction for the entire balance due with only \$10.00 available on the customer's card, the order has an outstanding balance of \$15.25 and is not settled. A partial approval is indicated by the yellow background with the amount due indicated at the top and "CAPTURED: CUSTOMER OWES DIFFERENCE" result text.

**TRANSACTION RESULTS**

**PARTIAL APPROVAL \$15.25 DUE**

**PRINT RECEIPT** **PRINT STATUS**

**FINISHED** **LOGOUT**

STATUS	PARTIAL APPROVAL
RESPONSE TEXT	CAPTURED: CUSTOMER OWES DIFFEREN...
CTROUTD	520
ORDER NUMBER	06
REFERENCE	[206] Invalid Track 2
APPROVED AMOUNT	\$10.00
DIFFERENCE DUE	\$15.25


**TRANSACTIONS**

NUMBER	66
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/27/2015 10:27 PM
SUBTOTAL	\$25.25
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$25.25
RECEIVED	\$10.00

**BALANCE DUE \$15.25**

### Partial Approval

If the transaction is declined for any reason, no funds are withdrawn from the gift card and the order's balance due remains unchanged. A declined transaction is indicated by a red background. Most unsuccessful gift card transactions are due to a zero available balance on the gift card.



BALANCE DUE \$2.03

NUMBER	76
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/28/2015 5:21 AM
SUBTOTAL	\$24.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$2.23
TOTAL	\$27.03
RECEIVED	\$25.00

TRANSACTIONS

RECALL

PRINT RECEIPT

CANCEL

TRANSACTION RESULTS

DECLINED

TRY AGAIN

STATUS

DECLINED

RESPONSE TEXT

DECLINED: AUTH DECLINED 200

CTROUTD

514

ORDER NUMBER

76

REFERENCE

[206] Invalid Track 2

TROUTD

6287680

INTRN\_SEQ\_NUM

6287680

Declined Gift Card Transaction

A duplicate transaction occurs if the same card is used to charge an order of the same amount in the same batch and is indicated by a yellow background on the transaction results screen. If the transaction is not a duplicate, press the override button to try again.

**TRANSACTION RESULTS**

**DUPLICATE TRANSACTION**

OVERRIDE DUPLICATE TRANSACTION

STATUS

RESPONSE TEXT Duplicate transaction based on a...

CTROUTD

ORDER NUMBER 1

REFERENCE [206] Invalid Track 2

TROUTD

INTRN\_SEQ\_NUM 6287700

DUPLICATE TRANSACTION

NUMBER	1
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/20/2015 2:16 PM
SUBTOTAL	\$9.35
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.84
TOTAL	\$10.19
RECEIVED	\$1.00

TRANSACTIONS RECALL PRINT RECEIPT CANCEL

Duplicate Gift Card Transaction

## 18.4 Datacap GIFTePay

### 18.4.1 Setup

The Datacap GIFTePay application provides a direct interface to many popular gift card processors so that gift cards can be shared between multiple stores. Using standard Internet or other TCP/IP virtual private network service, gift/prepaid requests are authorized in as little as 2 seconds. Also, automatic failover to dial backup is available by adding Datacap's fast connect modem, DialLink™.

<i>GIFTePay Supported Processors</i>	Gift	Loyalty	Dial Back-up	Rental	Notes
CardDog Gift	✓				
Chase Paymentech FlexCache Gift	✓				
Concord Datawire Gift	✓				EFSNet
EPI (Electronic Payments)	✓	✓			
EVO Gift	✓	✓		✓	
Fifth Third Processing	✓		✓		
First Data Gift Card	✓				Canada also
Givex Gift	✓	✓			
Heartland Chockstone Gift	✓			✓	
Mercury Gift	✓	✓	✓	✓	Canada also
Elavon Gift	✓				
Opticard	✓	✓	✓		
Perk Network (UniPerk) Gift	✓	✓			
ProfitPoint Gift	✓	✓			
Secure Payment Systems	✓				
Smart Transaction Systems	✓	✓			

GIFTePay Supported Processors (as of 10/10/2013)

GIFTePay's client/server architecture is scalable to fit the needs of any size enterprise and is currently operating in businesses ranging from a single register to over a thousand stores. The GIFTePay client, DSIClientX™, is integrated to the POS application and sends encrypted multi-threaded transaction requests to GIFTePay server, which can be located at each store, a headquarters location or at a remote payment services operator location. Easily integrated with a single interface for all major prepaid card processors, GIFTePay is relied on by hundreds of PC-based systems developers in various retail and food service segments to reliably and efficiently handle their prepaid requirements.

#### Initial Setup

Contact your merchant account provider to install and configure Datacap GIFTePay on the main pos station and one of the supported out-of-scope devices listed at Datacap's [web site](#). The same device can be used for both Datacap [NETePay](#)<sup>395</sup> and GIFTePay. After installation, run a test transaction using the EPAY administrator application to verify that the application is able to process transactions. In addition, add a GIFTePay shortcut to the Windows Startup folder so that GIFTePay runs automatically when the pos station is booted.

The screenshot shows the 'Setup GIFTePay Parameters' window. The 'Setup' menu item in the top bar is highlighted with a red box. The window displays the following information:

- Merchant Information:**
  - Merchant ID: 700000000245
  - Terminal ID: 001
- Options:**
  - ☐ Send <Memo> as Customer Data
  - ☐ Verify
  - ☐ Do Not Connect to Paymentech on Startup
  - ☒ Go To
- Other sections:** Internet Traffic (showing logs), NetConnect Information, and Security.

GIFTePay Settings

#### Back Office Settings

Open **Back Office>Settings>Gift Cards** to enter the required settings. In addition, click the Setup menu item in GIFTePay to view the GIFTePay parameters.



Gift Card Settings X

2 ↓

**General Settings**

Interface\* Datacap GIFTePay

**Datacap GIFTePay**

GIFTePay Merchant ID\* 700000000245

GIFTePay Terminal ID\*

GIFTePay Server IP\* 127.0.0.1 Server Test

GIFTePay Server Port\* 9100

GIFTePay Card Reader\* Datacap PDC Device Test

GIFTePay COM Port\* 4

GIFTePay PIN Pad Type\* None

Show Cash Out Button\* No

#### Back Office Gift Card Settings

- **Interface:** Select Datacap GIFTePay from the drop-down list.
- **GIFTePay Merchant ID:** Enter the Merchant ID as shown in the Merchant Information box in the GIFTePay setup screen.
- **GIFTePay Terminal ID:** Enter the Terminal ID as shown in the Merchant Information box in the GIFTePay setup screen.
- **GIFTePay Server IP:** Enter 127.0.0.1 if GIFTePay is running on the local pos station. Otherwise, enter the IP address of the pos station where GIFTePay is running (generally of the form 192.168.x.x).
- **GIFTePay Server Port:** Enter 9100, the default port used by GIFTePay.
- **GIFTePay Card Reader:** Select the device from the drop-down list. In most cases, the same device is used for both GIFTePay and [NETePay](#)<sup>395</sup>.
- **GIFTePay COM Port:** Select the virtual COM port used by the card reader.
- **GIFTePay PIN Pad Type:** A pin pad is currently not required for gift card transactions, but can be used for manual card number entry if required.
- **Show Cash Out Button:** Refer to the chart below to determine if the gift card processor supports the Cash Out transaction. If so, the set to Yes to display the Cash Out button on the gift cards screen.

PREPAID Transactions	Chock stone GIFT	Concord EFS GIFT	EPI GIFT	Fifth Third GIFT	Givex GIFT	Nova GIFT	Paymen tech GIFT	MPS GIFT	Secure Pay GIFT	Sterling GIFT	SVS GCS GIFT	Value Link GIFT	Valu tec GIFT
Issue	X	X	X	X	X	X	X	X	X	X	X	X	X
Void Issue	X	X	X	X	X	X	X	X	X	X	X	X	X
Sale	X	X	X	X	X	X	X	X	X	X	X	X	X
Return	X	X	X	X	X	X	X	X	X	X	X	X	X
Void Sale	X	X	X	X	X	X	X	X	X	X	X	X	X
Void Return	X	X	X	X	X	X	X	X	X	X	X	X	X
NoNSFSale	X	X	X	X	X	X	X	X	X	X	X	X	X
Reload	X	X	X	X	X	X	X	X	X	X	X	X	X
Void Reload	X	X	X	X	X	X	X	X	X	X	X	X	X
CashOut	X	X		X					X		X	X	X
Balance	X	X	X	X	X	X	X	X	X	X	X	X	X
GetPrepaidStripe	X	X	X	X	X	X	X	X	X	X	X	X	X

Cash Out Transaction Availability Chart

## 18.4.2 Usage

Datacap GIFTePay offers the following transaction types. With the exception of Cash Out, all transaction types are supported by all gift card processors and the procedure to perform each transaction type is identical, regardless of the gift card processor.

- **ISSUE** <sup>763</sup>
- **RELOAD** <sup>766</sup>
- **RETURN** <sup>767</sup>
- **CASH OUT** <sup>768</sup>
- **BALANCE** <sup>769</sup>
- **SALE** <sup>770</sup>
- **VOID ISSUE** <sup>774</sup>
- **VOID RELOAD** <sup>774</sup>
- **VOID RETURN** <sup>774</sup>
- **VOID SALE** <sup>774</sup>

### ISSUE

After logging in to the POS, press the GIFT CARDS button at the right and press the **ISSUE** button at the top to issue a new prepaid (stored value) card with a starting balance (value).



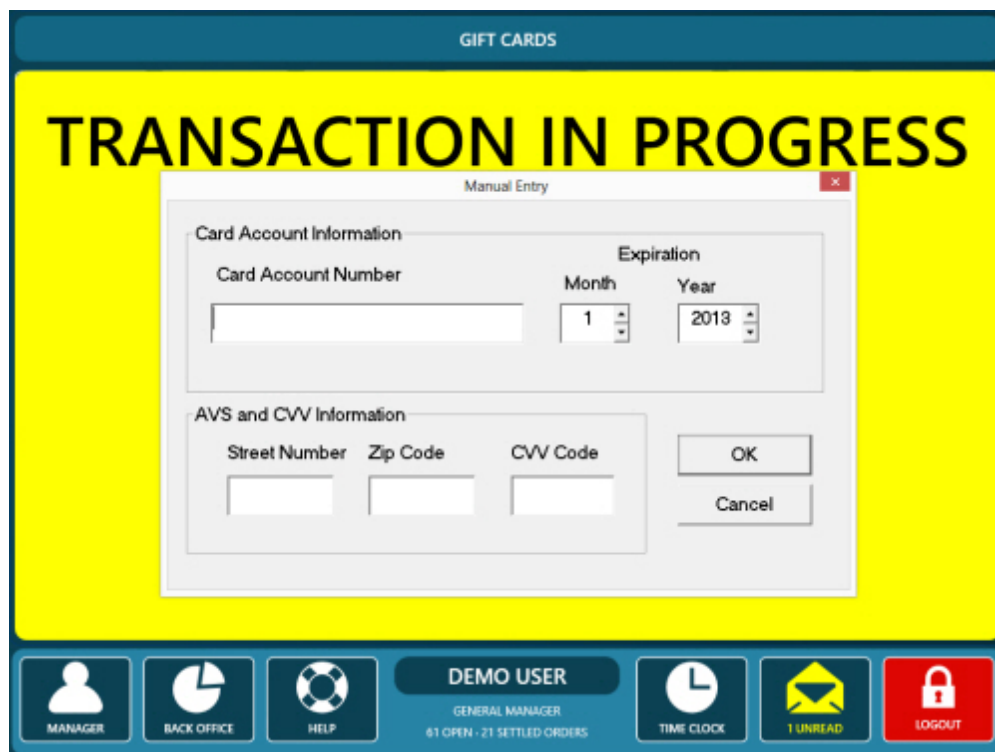
**GIFTePay Issue New Gift Card**

Enter the amount and select the gift card input method. **SWIPE CARD** should be used whenever possible.



GIFTePay Card Swipe Progress Window

**KEYBOARD ENTRY** can be used for cards with damaged magnetic stripes.



GIFTePay Manual Card Number Entry

The transaction results should appear within 2-3 seconds. A successful transaction will display a green background with APPROVED in block letters at the top with transaction information below, including the remaining balance. When issuing a new card, the remaining balance is always equal to the transaction amount. A brief transaction confirmation is printed at the local receipt printer and a new order containing the gift card is created and can be settled by pressing the SETTLE button at the right.



**GIFTePay Issue Transaction Results (Approved)**

A red background appears if the transaction is not successful. Review the status message to determine the cause of the decline or error. In the image below, the transaction error was caused by pressing the Cancel button on the manual card input screen.



**GIFTePay Issue Transaction Results (Error)**

#### **RELOAD**

After logging in to the POS, press the GIFT CARDS button at the right and press the **RELOAD** button at the top to add value to an existing prepaid card. Reload increases the available balance(value) of the account (card).



**GIFTePay Reload (Add Value)**

#### **RETURN**

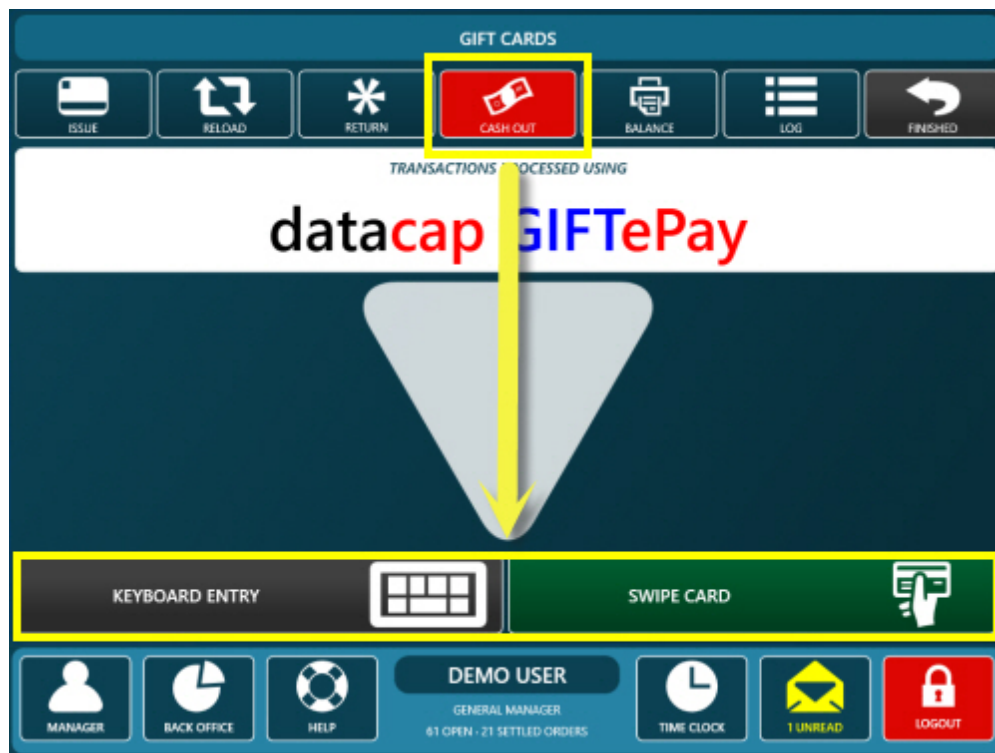
After logging in to the POS, press the GIFT CARDS button at the right and press the **RETURN** button at the top to process a return (refund) using a prepaid card. PrePaid returns increase the available balance (value) of the account (card).



**GIFTePay Return (Refund/Add Value)**

### **CASH OUT**

After logging in to the POS, press the GIFT CARDS button at the right and press the **CASH OUT** button at the top to process a cash refund of the remaining balance on a prepaid card. A cash out reduces the available balance (value) of the account (card) to zero.



**GIFTePay Cash Out (Redeem Remaining Balance For Cash)**

#### **BALANCE**

After logging in to the POS, press the GIFT CARDS button at the right and press the **BALANCE** button at the top to find the remaining balance (value) on a prepaid card.





GIFTePay Balance

**SALE**

After logging in to the POS, select the order and press the **SETTLE** button to load the order and display the settlement screen. Select the GIFT CARD payment method to process a payment (purchase) using the prepaid card. Prepaid sales reduce the available balance (value) of the account (card).

**BALANCE DUE \$5.45**

NUMBER	76
TYPE	COUNTER
SERVER	DEMO USER
STARTED	9/12/2013 12:09 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.45
TOTAL	\$5.45
RECEIVED	\$0.00

**SELECT THE PAYMENT METHOD**

- CASH
- CREDIT CARD
- DEBIT CARD
- LOYALTY CARD
- GIFT CARD**
- GIFT CERTIFICATE
- ROOM CHARGE
- FOREIGN CURRENCY
- HOUSE ACCOUNT
- CHECK
- MANUAL CREDIT

TRANSACTIONS CANCEL

Gift Card Payment Method

Enter the transaction amount and press the green button to continue. The maximum transaction amount allowed is the balance due on the order.

**BALANCE DUE \$5.40**

NUMBER	78
TYPE	COUNTER
SERVER	DEMO USER
STARTED	9/12/2013 5:41 PM
SUBTOTAL	\$4.95
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.45
TOTAL	\$5.40
RECEIVED	\$0.00

**GIFT CARD TRANSACTION**

ENTER THE AMOUNT (UP TO \$5.40)

CHANGE PAYMENT METHOD

1 2 3

4 5 6

7 8 9

0

EXACT CHANGE

NEXT \$ AMOUNT

TRANSACTIONS CANCEL

Transaction Amount

Select the gift card input method. **SWIPE CARD** should be used whenever possible. **KEYBOARD ENTRY** can be used for cards with damaged magnetic stripes.

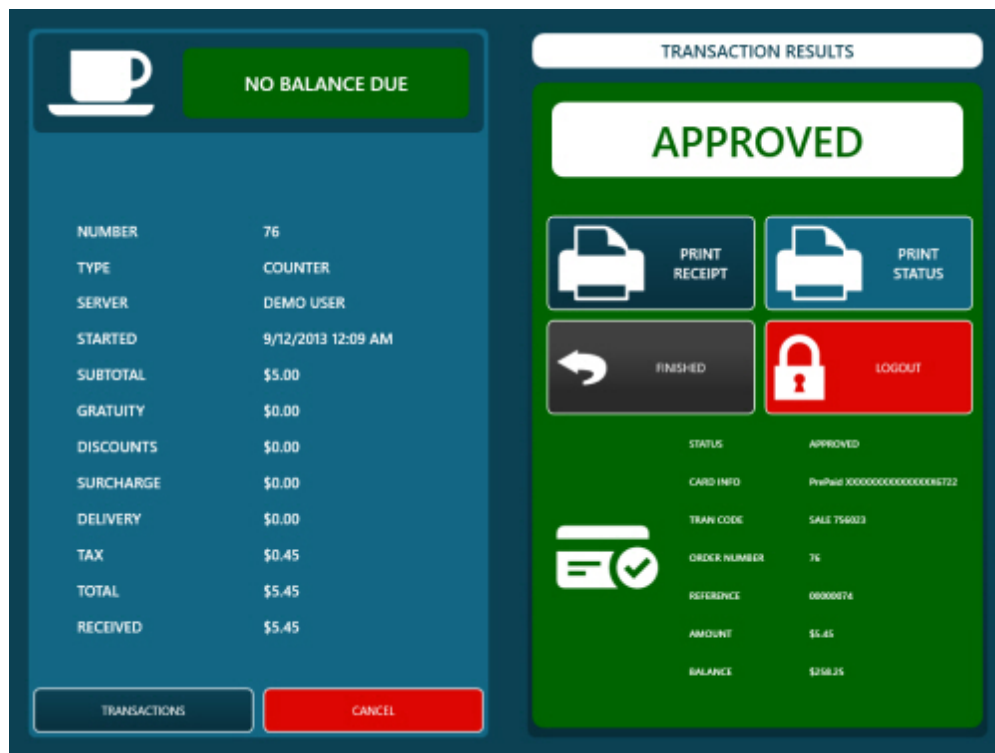
The screenshot shows the AmigoPOS 8 interface. At the top left, there is a coffee cup icon and a red button labeled "BALANCE DUE \$5.45". Below this, a table lists transaction details:

NUMBER	76
TYPE	COUNTER
SERVER	DEMO USER
STARTED	9/12/2013 12:09 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.45
TOTAL	\$5.45
RECEIVED	\$0.00

At the bottom of the left section are two buttons: "TRANSACTIONS" (grey) and "CANCEL" (red). The right section is titled "SELECT THE GIFT CARD ENTRY METHOD" and contains three large buttons: "KEYBOARD ENTRY" (dark grey with a keyboard icon), "SWIPE CARD" (green with a play button icon), and "CANCEL" (red with a prohibition sign icon).

#### GIFTePay Input Method

The transaction results should appear within 2-3 seconds. A successful transaction will display a green background with APPROVED in block letters at the top with transaction information below, including the remaining balance.



The screen displays a successful transaction. On the left, a coffee cup icon is next to a green box stating "NO BALANCE DUE". Below this is a list of transaction details. On the right, a green box at the top says "APPROVED". Below this are buttons for "PRINT RECEIPT", "PRINT STATUS", "FINISHED", and "LOGOUT". A card icon with a checkmark is shown next to a list of transaction details.

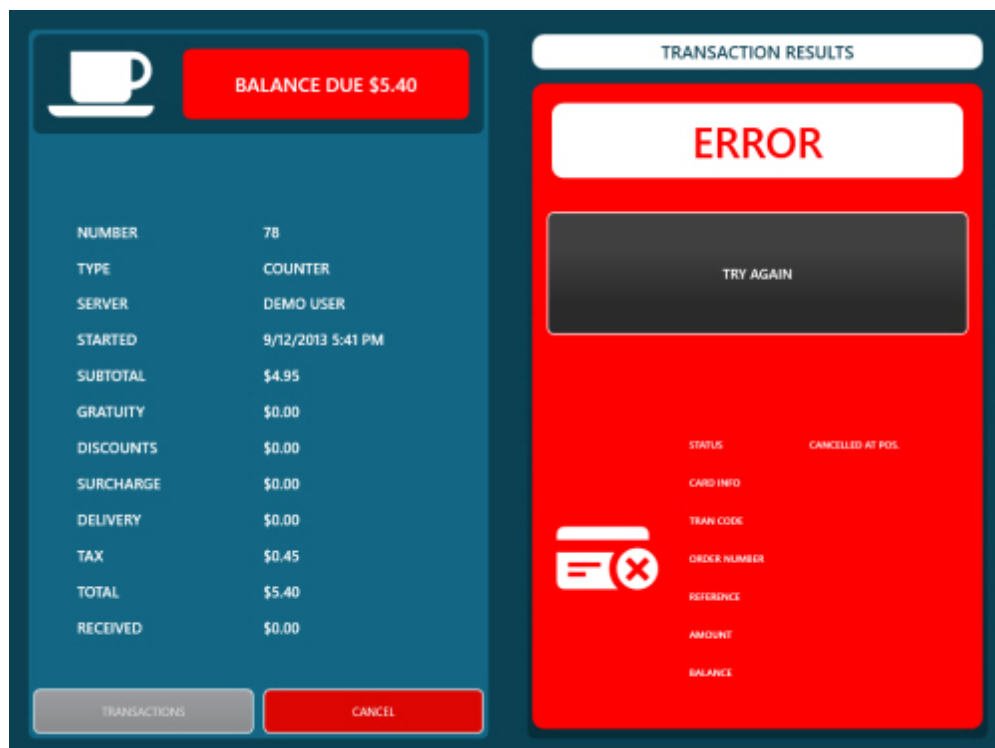
NUMBER	76
TYPE	COUNTER
SERVER	DEMO USER
STARTED	9/12/2013 12:09 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.45
TOTAL	\$5.45
RECEIVED	\$5.45

STATUS	APPROVED
CARD INFO	PrePaid XXXXXXXXXXXXXXXX86722
TRAN CODE	SALE TS6023
ORDER NUMBER	76
REFERENCE	00000874
AMOUNT	\$5.45
BALANCE	\$258.25

GIFTePay Transaction Results (Approved)

A red background appears if the transaction is not successful. Review the status message to determine the cause of the decline or error. In the image below, the transaction error was caused by pressing the Cancel button on the manual card input screen.



The screen displays a declined transaction. On the left, a coffee cup icon is next to a red box stating "BALANCE DUE \$5.40". Below this is a list of transaction details. On the right, a red box at the top says "ERROR". Below this is a "TRY AGAIN" button. A card icon with an 'X' is shown next to a list of transaction details.

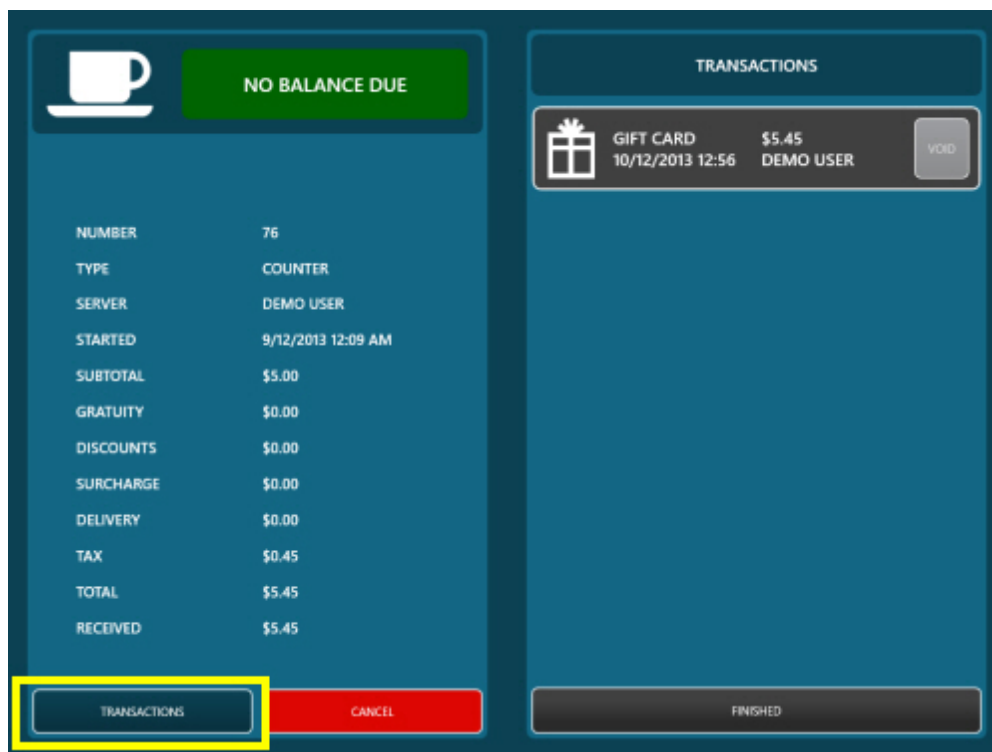
NUMBER	78
TYPE	COUNTER
SERVER	DEMO USER
STARTED	9/12/2013 5:41 PM
SUBTOTAL	\$4.95
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.45
TOTAL	\$5.40
RECEIVED	\$0.00

STATUS	CANCELLED AT POS
CARD INFO	
TRAN CODE	
ORDER NUMBER	
REFERENCE	
AMOUNT	
BALANCE	

GIFTePay Transaction Results (Declined)

A list of payments applied to the current order is available by pressing the TRANSACTIONS button at the bottom right. Unlike most transaction types, gift card transactions cannot be voided on the settlement screen and can only be voided directly on the gift cards screen (or by signing in to the gift card processor's web portal)



Transactions List

### LOG

After logging in to the POS, press the GIFT CARDS button at the right and press the **LOG** button to view a list of gift card transactions that have been processed since the last end of day was run. Declined transactions do not appear on the list. Transactions that can be voided are listed with 2 void buttons, keyboard input void and card swipe void. Void transactions are as follows:

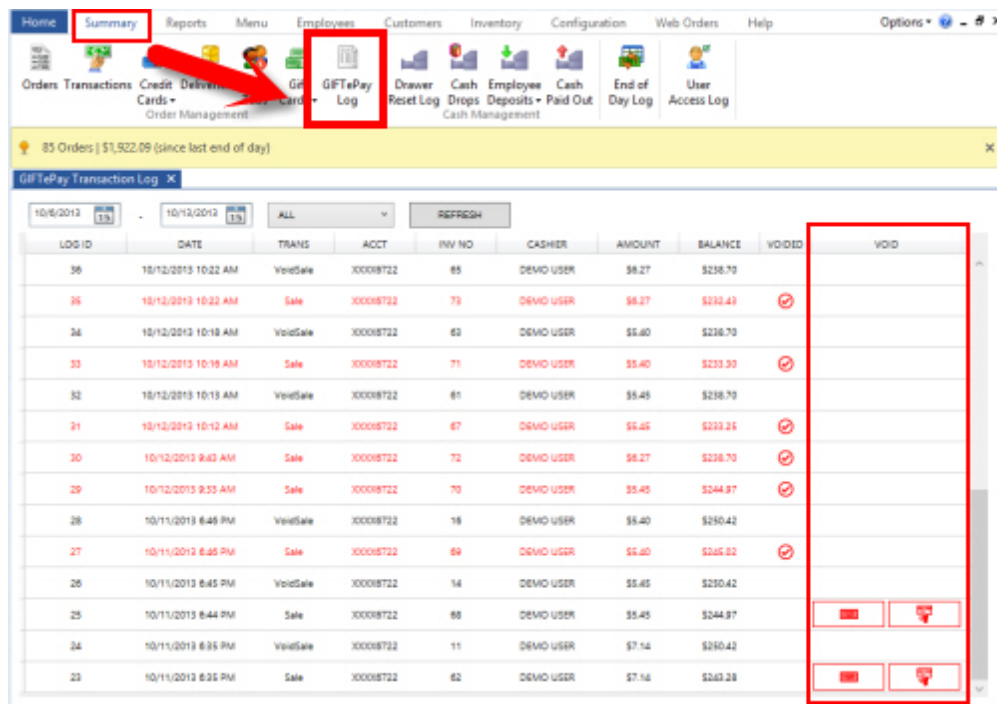
- **Void Issue:** To void the previous issue a new prepaid (stored value) card with a starting balance (value).
- **Void Reload:** To void a previous Reload transaction to an existing card. Voiding a Reload decreases the available balance (value) of the account (card).
- **Void Return:** To void a previous a return (refund) on a prepaid card. Gift card void returns decrease the available balance (value) of the account (card).
- **Void Sale:** To void a previous a payment (purchase) on a prepaid card. Gift card void sales increase the available balance (value) of the account (card).



GIFTePay Transaction Log

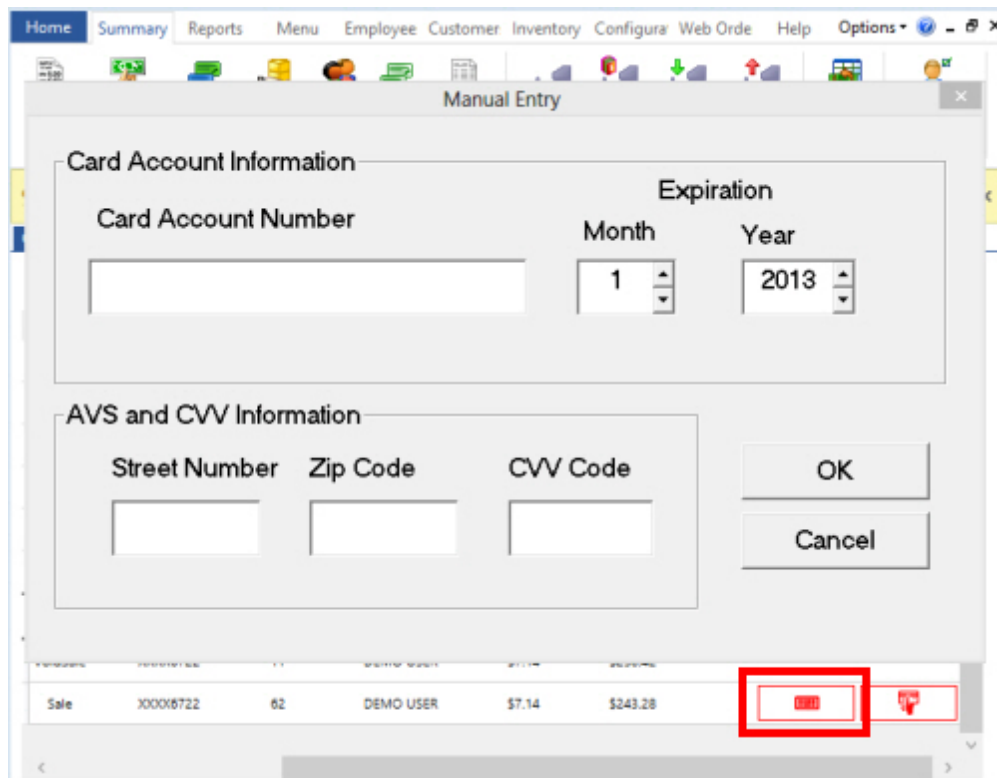
### 18.4.3 Transaction Log

A list of previously approved GIFTePay transactions is available in **Back Office>Summary>GIFTePay Log**. The list includes transactions completed on the local pos system only. In most cases, it is preferable to use the gift card processor's secure web portal to void existing transactions because GIFTePay requires the user to swipe or input the card number in order to process a void.



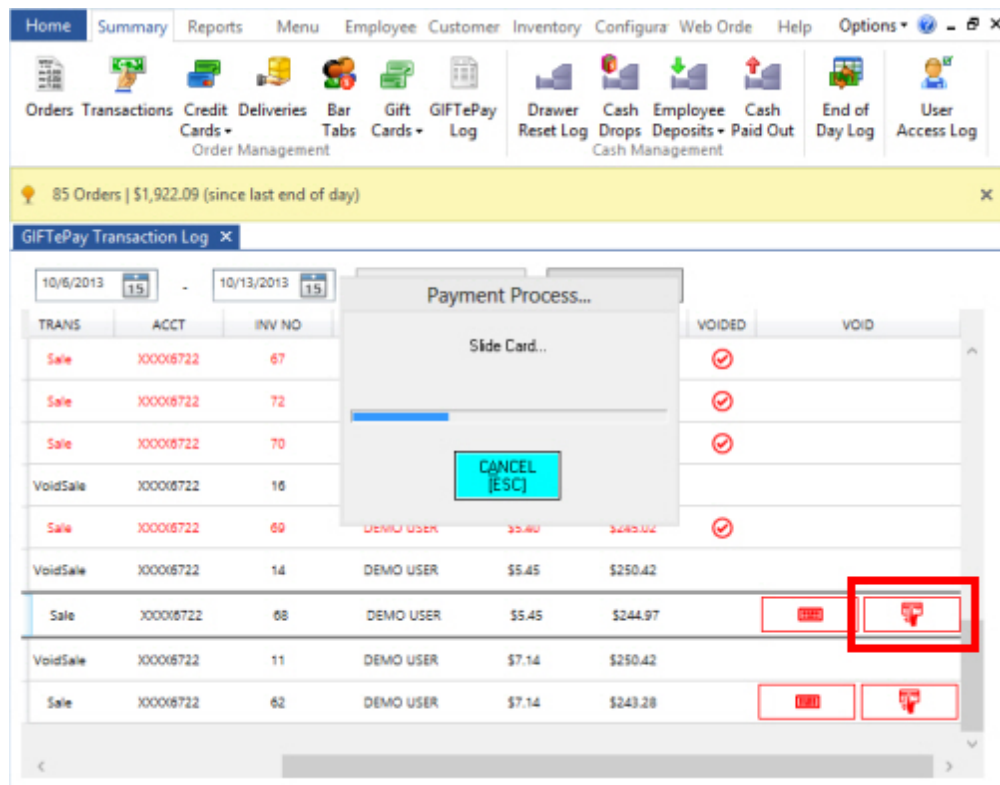
GIFTePay Transaction Log

Transactions that can be voided locally are listed with 2 buttons in the VOID column. The button with the keyboard icon is used for manual card entry and the button with the card icon is used when the card is swiped.



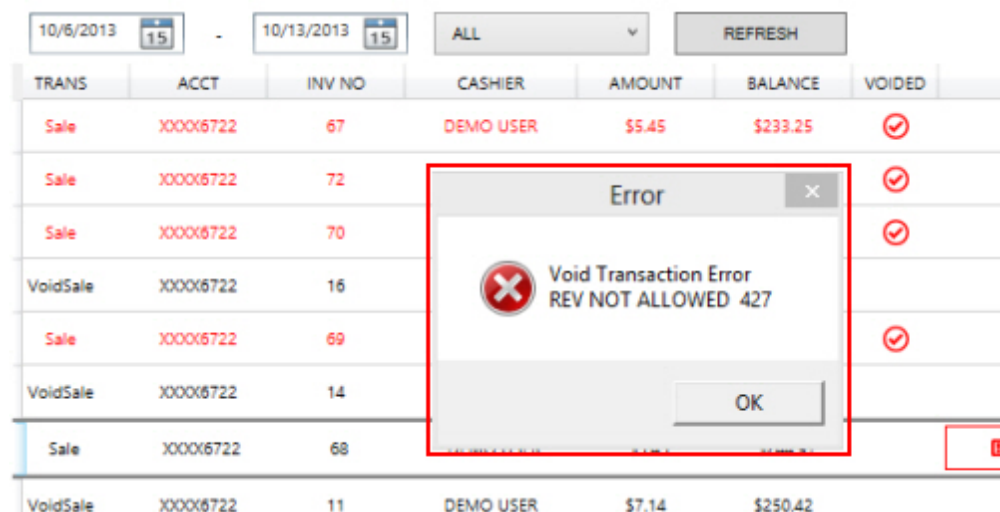
Void Transaction (Keyboard Input)

Select the input method to continue. When using the CARD SWIPE input method, the transaction will time-out if the card is not swiped within 60 seconds.



**Void Transaction (Swipe Card)**

The transaction results will appear in 2-3 seconds. Transaction errors are shown with the error description returned by the processor. In the image below, the **REV NOT ALLOWED** message may indicate that the SALE transaction was previously voided or the wrong card was swiped.



**Transaction Error**



## 18.5 Vantiv Gift

### 18.5.1 Setup

Gift card processing is offered as an add-on to your existing Mercury Pay credit card merchant account. The same secure device and merchant account number is used to process gift card transactions. Sign up for MercuryGift and order a starter back of 500 customizable gift cards at <http://www.mercurypay.com/product/gift-card-processing>.

#### Contact Information

800.846.4472

[salesupport@mercurypay.com](mailto:salesupport@mercurypay.com)

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

Gift Card Settings	
<b>General Settings</b>	
Interface*	MercuryGift/Datacap GIFTePay
<b>MercuryGift/Datacap GIFTePay Settings</b>	
Merchant ID*	023358150511666
Server IP/URL*	g1.mercurydev.net;g2.mercurydev.net <span>Server Test</span>
Server Port*	9100
Card Reader*	MagTek MINI MSR (HID) <span>Device Test</span>
COM Port*	None
PIN Pad Type*	None
<b>Interface*</b> Select the gift card processing method	

#### MercuryGift Settings

The following settings are used to configure MercuryGift at the pos station. Note that the settings must be entered at each pos station and back office PC that is used to process gift card transactions.

- **Interface:** Select MercuryGift/Datacap GIFTePay from the drop-down list
- **Merchant ID:** Enter the merchant id provided by Mercury Payment Systems
- **Server IP/URL:** Enter the service URLs provided by Mercury Payment Systems
- **Server Port:** Enter 9100 for MercuryGift
- **Card Reader:** Select the device used to swipe gift cards at this pos station. The same device is usually used for both credit card and gift gift processing, although it is possible to use separate devices if necessary.
- **COM Port:** Select the virtual COM port assigned to this device. This setting is only used for devices that are assigned a COM port by the device driver, such as the Datacap PDC.
- **PIN Pad Type:** Set the pin pad type to None. MercuryGift does not currently support the use of a pin pad for gift card transactions.

### 18.5.2 Usage

#### 18.5.2.1 Gift Cards Screen

Enter topic text here. Login and press Gift Cards on the right to access the gift cards screen. Note that the gift cards button may be hidden depending on the logged in users permissions as described [below](#).<sup>[746]</sup>

The following functions are available on the gift cards screen:

- **Activate:** <sup>747</sup> Activate a new gift card
- **Add Value:** <sup>748</sup> Add value to a previously activated gift card
- **Balance:** <sup>749</sup> View and print the available balance on a gift card
- **Log:** <sup>750</sup> View a list of recent gift card transactions



Gift Cards Screen

### Employee Permissions

Access to the gift cards screen and individual gift card functions are determined by the logged in user's [permissions](#) <sup>698</sup> with the exception of the gift card balance and transaction log, which are available to all users with access to the gift cards screen. The following permissions are used to restrict access to individual gift card functions:

- **Allow Gift Cards:** User can access the gift cards screen
- **Allow Gift Card Activate:** User can activate new gift cards
- **Allow Gift Card Add Value:** User can add value to previously activated gift cards
- **Allow Gift Card Cash Out:** User can cash out (redeem) gift card balance for cash
- **Allow Gift Card Deactivate:** User can deactivate lost or stolen gift cards

**Jobs & Permissions** X

? Delete Selected Add: Show List

GENERAL MANAGER (32) GENERAL MANAGER (32) ASSIGNMENTS

Default Order Type: None Add employee to list... Remove

☐ Disable Job

User can activate new gift cards

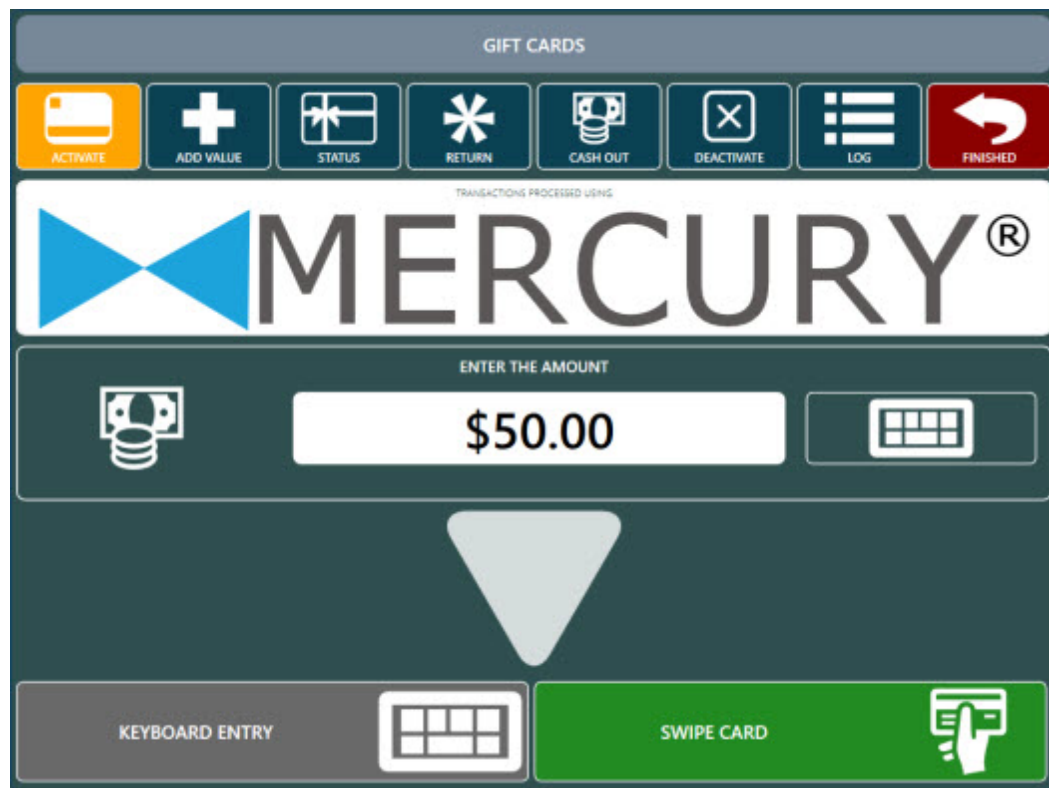
- ☒ Allow Discounts
- ☒ Allow Gift Card Activate
- ☒ Allow Gift Card Add Value
- ☒ Allow Gift Card Cash Out
- ☒ Allow Gift Card Deactivate
- ☒ Allow Gift Cards
- ☒ Allow Hold
- ☒ Allow House Accounts
- ☒ Allow Inventory Count
- ☒ Allow Inventory Receive

USER, DEMO

#### Gift Card Permissions

##### Activate

New gift cards are usually supplied by the payment processor and are pre-encoded with track 2 data. All cards have zero value before activation and a balance inquiry will result in a "Card Not Found" error. Press ACTIVATE and enter the gift card amount. Press SWIPE CARD to send the request to the Verifone Point device. Although the option to manually enter the gift card account number is available, gift cards with a damaged or otherwise unreadable magnetic stripe that have not been previously activated should be discarded.



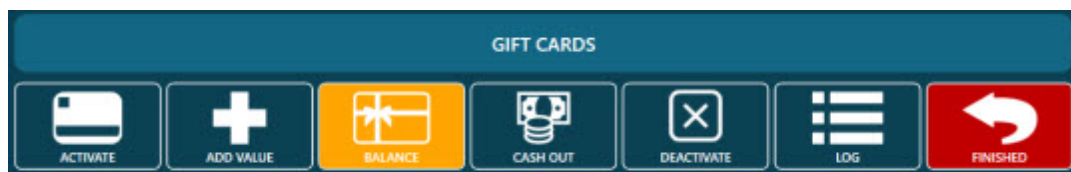
**Issue New Gift Card**

**Add Value**

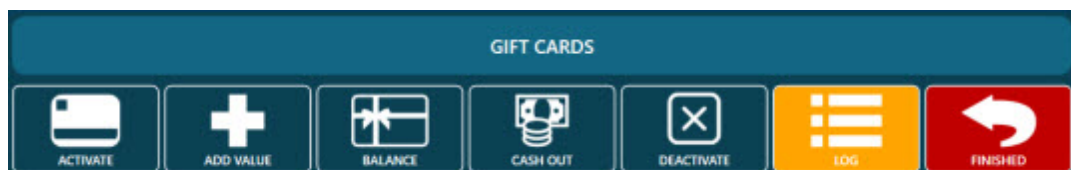
Additional funds can be added to a previously activated gift card by pressing ADD VALUE. Enter the amount to add and press SWIPE CARD to send the request to the Verifone Point device. If the gift card is unreadable due to a damaged magnetic stripe, press HAND KEYED to enter the account number manually.

**Add Value (Reload)****Balance**

Press the BALANCE button to view or print the gift card's available balance.

**Balance****Log**

The log maintains a list of XML requests sent to MercuryGift and XML responses received from MercuryGift. The log is useful for troubleshooting during initial setup.

**Log**

### 18.5.2.2 Settle Screen

Login to AmigoPOS, expand an order on the recall list and press SETTLE to open the order on the settle screen. Select the GIFT CARD payment method to continue.

The screenshot displays the AmigoPOS Settle Screen. On the left, a table lists order details: NUMBER 4, TYPE COUNTER, SERVER DEMO USER, STARTED 2/20/2015 4:00 PM, SUBTOTAL \$3.75, GRATUITY \$0.00, DISCOUNTS \$0.00, SURCHARGE \$0.00, DELIVERY \$0.00, TAX \$0.34, TOTAL \$4.09, and RECEIVED \$0.00. A red button at the top right indicates 'BALANCE DUE \$4.09'. On the right, a 'SELECT THE PAYMENT METHOD' grid contains icons for CASH, CREDIT CARD, DEBIT CARD, LOYALTY CARD, GIFT CARD (highlighted with a yellow box), GIFT CERTIFICATE, ROOM CHARGE, FOREIGN CURRENCY, HOUSE ACCOUNT, CHECK, and MANUAL CREDIT. At the bottom left are buttons for TRANSACTIONS, RECALL, PRINT RECEIPT, and CANCEL.

NUMBER	4
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/20/2015 4:00 PM
SUBTOTAL	\$3.75
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.34
TOTAL	\$4.09
RECEIVED	\$0.00

**BALANCE DUE \$4.09**

**SELECT THE PAYMENT METHOD**

- CASH
- CREDIT CARD
- DEBIT CARD
- LOYALTY CARD
- GIFT CARD**
- GIFT CERTIFICATE
- ROOM CHARGE
- FOREIGN CURRENCY
- HOUSE ACCOUNT
- CHECK
- MANUAL CREDIT

TRANSACTIONS RECALL PRINT RECEIPT CANCEL

#### Gift Card Payment Method

Enter the transaction amount. The maximum transaction amount is limited to the balance due on the order. In the example below, the user is prevented from continuing because the transaction amount is larger than the balance due.

NUMBER	4
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/20/2015 4:00 PM
SUBTOTAL	\$3.75
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.34
TOTAL	\$4.09
RECEIVED	\$0.00

**BALANCE DUE \$4.09**

**GIFT CARD TRANSACTION**

ENTER THE AMOUNT (UP TO \$4.09)

**\$4.10**

CHANGE PAYMENT METHOD

1 2 3

4 5 6

7 8 9

0

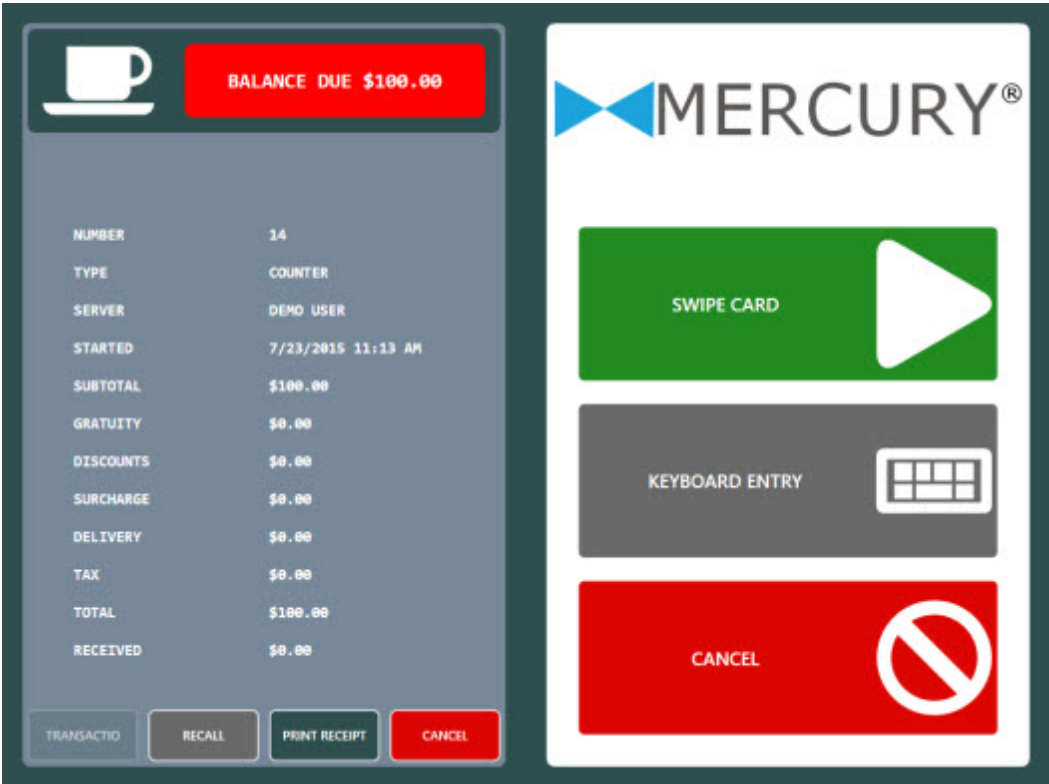
EXACT CHANGE

NEXT \$ AMOUNT

TRANSACTIONS RECALL PRINT RECEIPT CANCEL

### Transaction Amount Entry

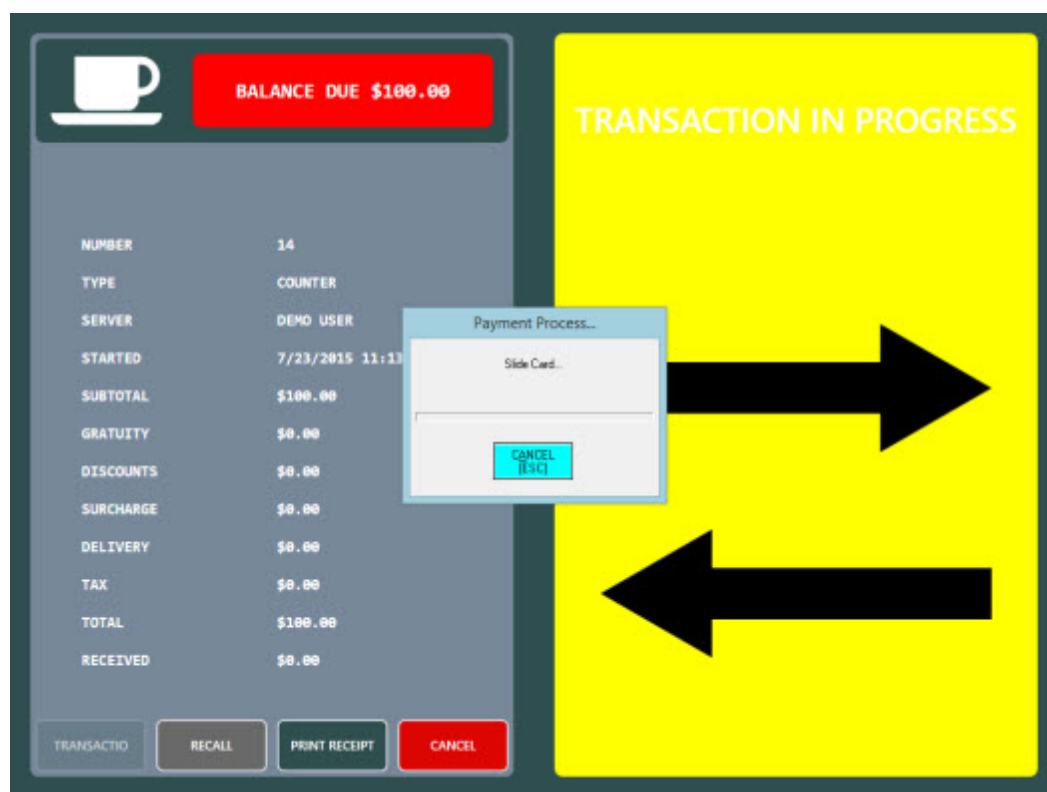
Press SWIPE CARD to send the request to the Verifone Point device. If the gift card is unreadable due to a damaged magnetic stripe, press HAND KEYED to enter the account number manually.



Input Method Selection

Allow up to 30 seconds to receive a response from the device after the card is swiped.



**Card Swipe Prompt**

A successful result is indicated by a dark green background on the response screen. Note that if the approved amount is different from the transaction amount, the background color is indigo. This may occur when a prepaid card with insufficient funds is used.

NO BALANCE DUE

NUMBER	14
TYPE	COUNTER
SERVER	DEMO USER
STARTED	7/23/2015 11:13 AM
SUBTOTAL	\$100.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$100.00
RECEIVED	\$100.00

TRANSACTIONS

TRANSACTION RESULTS

APPROVED

VOID TRANSACTION

PRINT RECEIPT

PRINT STATUS

FINISHED

LOGOUT

STATUS	APPROVED
CARD NUMBER	6050110000012400790
TRAN CODE	NONSFSALE 685918
ORDER NUMBER	14
REFERENCE	685918
AMOUNT	\$100.00
BALANCE	\$75.00

Successful Gift Card Transaction

If the funds available on the gift card are less than the transaction amount, a partial approval message is returned by the payment processor. In the example below, the balance due on the order was \$25.25. After attempting a transaction for the entire balance due with only \$10.00 available on the customer's card, the order has an outstanding balance of \$15.25 and is not settled. A partial approval is indicated by the yellow background with the amount due indicated at the top and "CAPTURED: CUSTOMER OWES DIFFERENCE" result text.

**TRANSACTION RESULTS**

**PARTIAL APPROVAL \$42.78 DUE**

**VOID TRANSACTION**

**PRINT RECEIPT** **PRINT STATUS**

**FINISHED** **LOGOUT**

**STATUS** APPROVED

**CARD NUMBER** 6050110000012490790

**TRAN CODE** MONSFSALE 685922

**ORDER NUMBER** 15

**REFERENCE** 685922

**AMOUNT** \$12.22


**BALANCE** \$0.00

NUMBER	15
TYPE	COUNTER
SERVER	DEMO USER
STARTED	7/23/2015 11:14 AM
SUBTOTAL	\$55.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$55.00
RECEIVED	\$12.22

TRANSACTIONS

### Partial Approval

If the transaction is declined for any reason, no funds are withdrawn from the gift card and the order's balance due remains unchanged. A declined transaction is indicated by a red background. Most unsuccessful gift card transactions are due to a zero available balance on the gift card.



BALANCE DUE \$100.00

NUMBER	14
TYPE	COUNTER
SERVER	DEMO USER
STARTED	7/23/2015 11:13 AM
SUBTOTAL	\$100.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$100.00
RECEIVED	\$0.00

TRANSACTION

RECALL

PRINT RECEIPT

CANCEL

TRANSACTION RESULTS

DECLINED

TRY AGAIN

STATUS

INSUFFICIENT ACCOUNT BALANCE

CARD NUMBER

6050110000012400792

TRAN CODE

NONSALE

ORDER NUMBER

14

REFERENCE

AMOUNT

\$100.00

BALANCE

\$0.00

Declined Gift Card Transaction

A duplicate transaction occurs if the same card is used to charge the same order number for the same amount in the same batch and is indicated by a red background on the transaction results screen.

BALANCE DUE \$5.00

NUMBER	17
TYPE	COUNTER
SERVER	DEMO USER
STARTED	7/23/2015 11:17 AM
SUBTOTAL	\$5.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.00
TOTAL	\$5.00
RECEIVED	\$0.00

TRANSACTION
RECALL
PRINT RECEIPT
CANCEL

TRANSACTION RESULTS

DECLINED

TRY AGAIN

STATUS

DUPLICATE TRANSACTION

CARD NUMBER

6050110000012400790

TRAN CODE

NONSALE

ORDER NUMBER

17

REFERENCE

AMOUNT

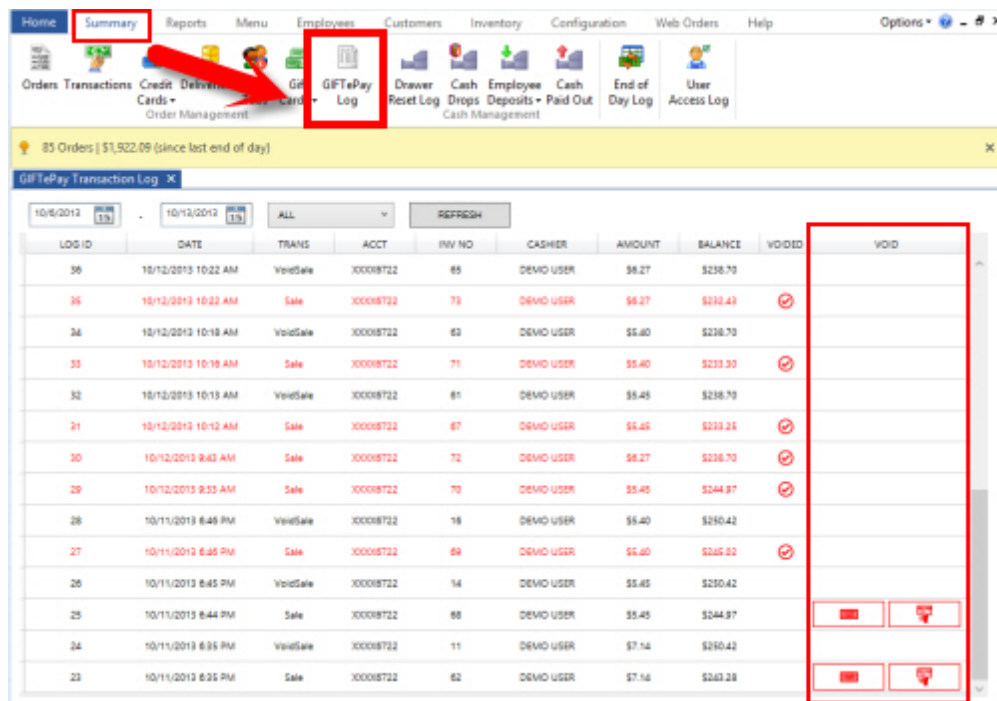
\$5.00

BALANCE

Duplicate Gift Card Transaction

### 18.5.3 Transaction Log

A list of previously approved GIFTePay transactions is available in **Back Office>Summary>GIFTePay Log**. The list includes transactions completed on the local pos system only. In most cases, it is preferable to use the gift card processor's secure web portal to void existing transactions because GIFTePay requires the user to swipe or input the card number in order to process a void.



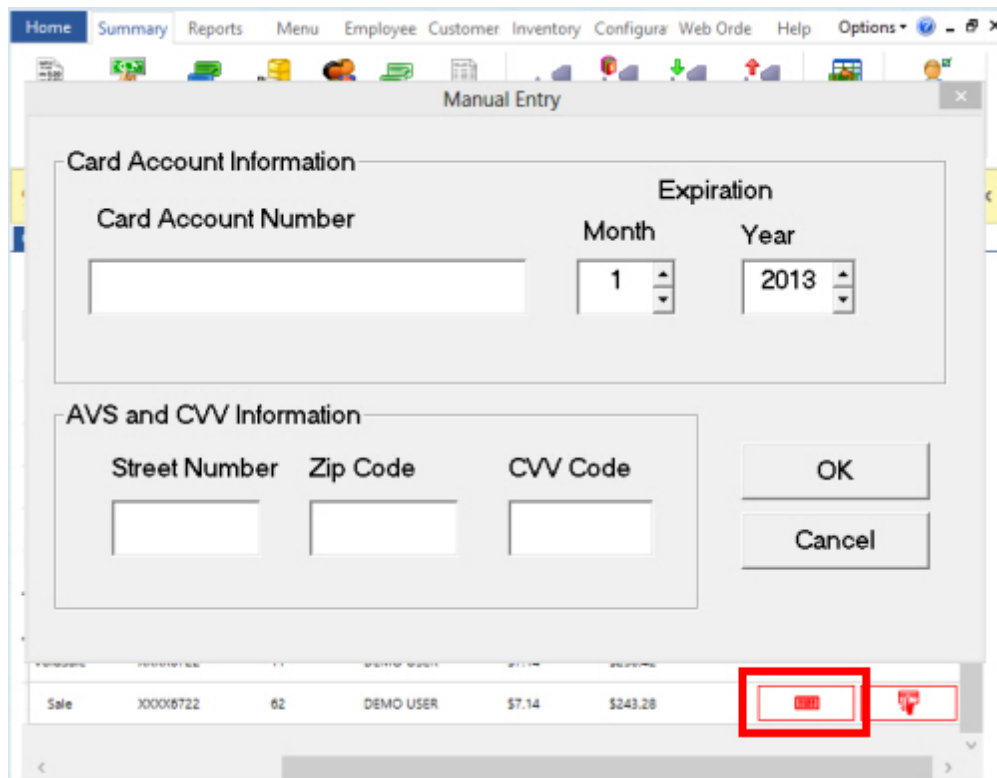
85 Orders | \$1,922.09 (since last end of day)

**GIFTePay Transaction Log**

LOG ID	DATE	TRANS	ACCT	INV NO	CASHIER	AMOUNT	BALANCE	VOIDED	VOID
36	10/12/2013 10:22 AM	VoidSale	XXXX8722	85	DEMO USER	\$6.27	\$238.70		
35	10/12/2013 10:22 AM	Sale	XXXX8722	79	DEMO USER	\$6.27	\$232.43	✓	
34	10/12/2013 10:18 AM	VoidSale	XXXX8722	80	DEMO USER	\$5.40	\$238.70		
33	10/12/2013 10:18 AM	Sale	XXXX8722	71	DEMO USER	\$5.40	\$233.30	✓	
32	10/12/2013 10:13 AM	VoidSale	XXXX8722	81	DEMO USER	\$5.45	\$238.70		
31	10/12/2013 10:12 AM	Sale	XXXX8722	87	DEMO USER	\$5.45	\$233.25	✓	
30	10/12/2013 9:43 AM	Sale	XXXX8722	72	DEMO USER	\$6.27	\$238.70	✓	
29	10/12/2013 9:33 AM	Sale	XXXX8722	70	DEMO USER	\$5.45	\$244.97	✓	
28	10/11/2013 8:48 PM	VoidSale	XXXX8722	18	DEMO USER	\$5.40	\$250.42		
27	10/11/2013 8:45 PM	Sale	XXXX8722	69	DEMO USER	\$5.40	\$245.02	✓	
26	10/11/2013 8:45 PM	VoidSale	XXXX8722	14	DEMO USER	\$5.45	\$250.42		
25	10/11/2013 8:44 PM	Sale	XXXX8722	88	DEMO USER	\$5.45	\$244.97		
24	10/11/2013 8:35 PM	VoidSale	XXXX8722	11	DEMO USER	\$7.14	\$250.42		
23	10/11/2013 8:26 PM	Sale	XXXX8722	62	DEMO USER	\$7.14	\$243.28		

GIFTePay Transaction Log

Transactions that can be voided locally are listed with 2 buttons in the VOID column. The button with the keyboard icon is used for manual card entry and the button with the card icon is used when the card is swiped.



**Manual Entry**

**Card Account Information**

Card Account Number:

Expiration: Month  Year

**AVS and CVV Information**

Street Number:  Zip Code:  CVV Code:

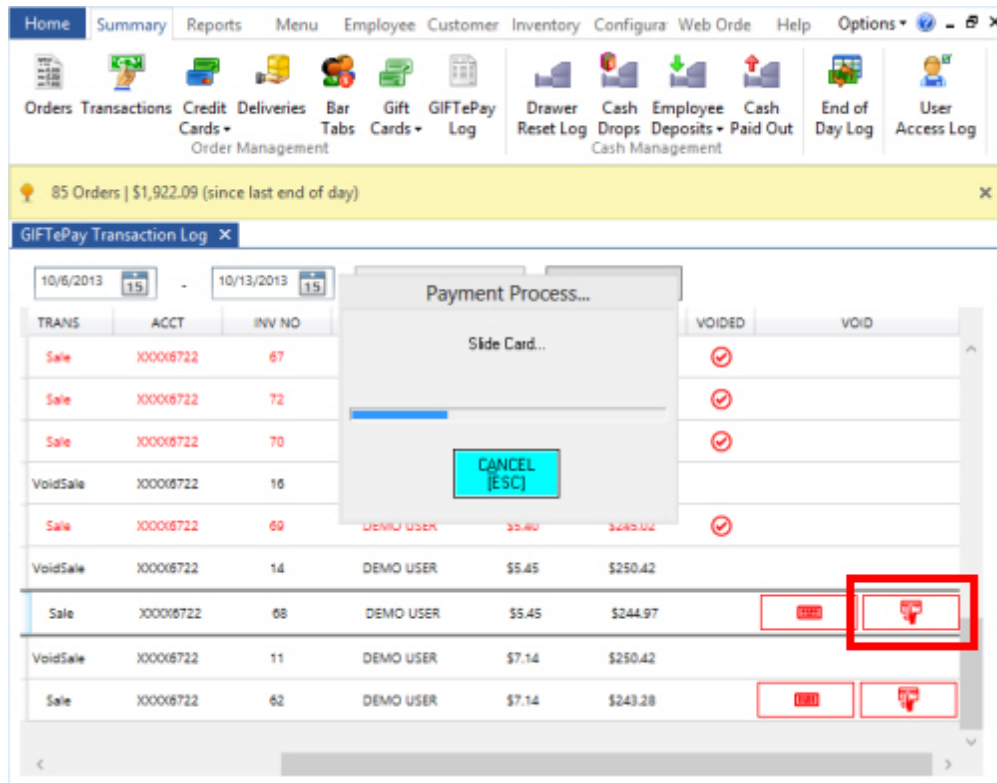
OK Cancel

Transaction Log (bottom of dialog):

Sale	XXXX8722	62	DEMO USER	\$7.14	\$243.28		
------	----------	----	-----------	--------	----------	--	--

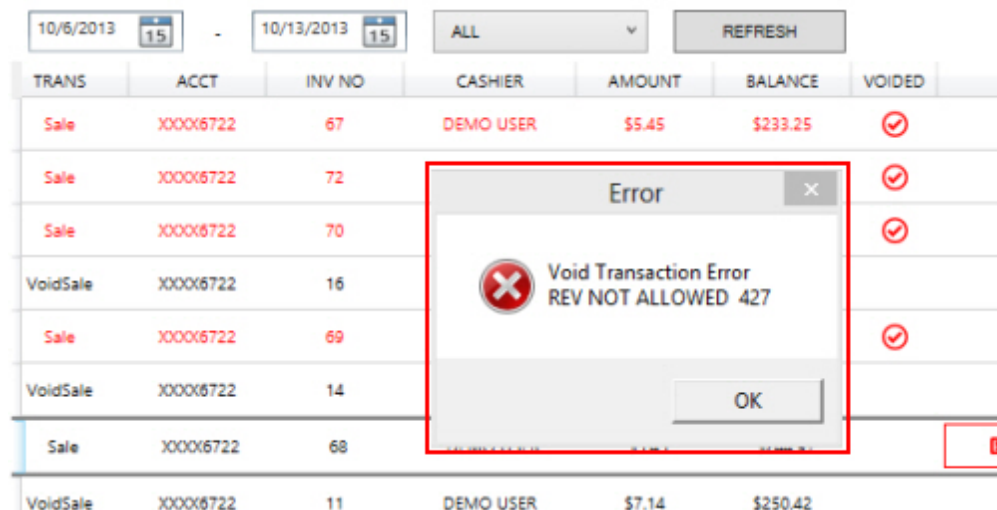
Void Transaction (Keyboard Input)

Select the input method to continue. When using the CARD SWIPE input method, the transaction will time-out if the card is not swiped within 60 seconds.



**Void Transaction (Swipe Card)**

The transaction results will appear in 2-3 seconds. Transaction errors are shown with the error description returned by the processor. In the image below, the **REV NOT ALLOWED** message may indicate that the SALE transaction was previously voided or the wrong card was swiped.



**Transaction Error**

Part 19

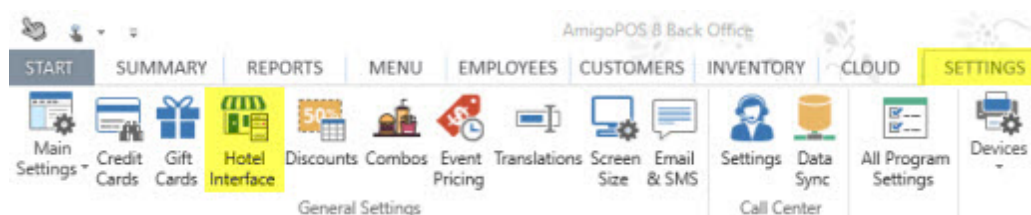
# Hotel Interface



## 19 Hotel Interface

### 19.1 Setup

Amigo POS is capable of posting room charge transactions to Micros 4700 compatible property management system posting interfaces using TCP/IP or a serial port interface. Please confirm that the interface works with your property management system external posting interface before purchasing AmigoPOS.



**Back Office > Configuration > Hotel Interface**

**HOTEL INTERFACE SETTINGS**

Settings
Test
Log

General Settings	
Enable*	Yes
Emulation*	Micros 4700
Interface*	TCP/IP
Remote IP*	192.168.1.7
Remote Port*	1555
Timeout*	11
Signature Slip and Swipe Card Settings	
Room Charge Card End Sentinel	?
Room Charge Card Start Sentinel	%
Room Charge Signature Slip Disclaimer 1	I agree to add the above total
Room Charge Signature Slip Disclaimer 2	to my final hotel bill
Room Charge Auto Print Post Signature Slip	No

**Enable\***

Set to Yes to enable the hotel interface at this pos station

**Hotel Interface Setup & Testing**

#### Serial Communications

Serial communications should be used only when the POS Station is in close proximity to the property management system external posting interface and a TCP/IP communications are not available in the EPI. Use a NULL modem (RS-232) cable less than 50 feet long to connect the POS to the EPI. A NULL modem adapter can be used with a standard serial cable if a NULL modem cable is not available. The interface should be set to run at 9600 Baud, 8 Data Bits, 1 Start Bit and 1 Stop Bit with no parity checks. No flow control should be used unless necessitated by the use of serial port adapters (such as USB to RS-232 adapters). The serial port settings in Windows Device Manager should be identical on the POS and EPI computers. There are no default settings in the AmigoPOS setup dialog and each setting must be set explicitly by the use.

**HOTEL INTERFACE SETTINGS**

Settings Test Log

**General Settings**

Enable*	Yes
Emulation*	Micros 4700
Interface*	Serial Port
Timeout*	11

**Serial Port Configuration**

Comm Port*	3
Bits Per Second*	9600
Data Bits*	8
Stop Bits*	1
Parity*	Even
FlowControl*	Xon \ Xoff

☒ **Signature Slip and Swipe Card Settings**

**Enable\***  
Set to Yes to enable the hotel interface at this pos station

#### Serial Communications Settings

#### TCP/IP Configuration

In AmigoPOS back office, click the Hotel Interface button under the configuration button group. For emulation, select Micros 4700 from the drop-down list. Select TCP/IP as the interface type. Click the IP Settings tab. If Amigo POS is installed on the same computer as the pms external posting interface, enter 127.0.0.1 for the IP address. Otherwise, enter the IP address on which the posting interface is installed. For the port setting, enter 1555 or any other unused port on the local PC. Verify that the firewall at each pos is configured to allow an exception for AmigoPOS and the external posting interface (for the remote port). On the external posting interface, enter the IP address of the computer on which Amigo POS is installed. Enter the same port number you entered in the previous step. Note that a separate session must be created for each pos station that is used to post room charges.

HOTEL INTERFACE SETTINGS	
Settings Test Log	
<b>General Settings</b>	
Enable*	Yes
Emulation*	Micros 4700
Interface*	TCP/IP
Remote IP*	192.168.1.7
Remote Port*	1555
Timeout*	11
<b>Signature Slip and Swipe Card Settings</b>	
Room Charge Card End Sentinel	?
Room Charge Card Start Sentinel	%
Room Charge Signature Slip Disclaimer 1	I agree to add the above total
Room Charge Signature Slip Disclaimer 2	to my final hotel bill
Room Charge Auto Print Post Signature Slip	No
<b>Interface*</b>	
Select the interface type	

#### TCP/IP Communications Settings

#### Settings

##### General Settings

**Enable\*:** Set to Yes to enable the hotel interface at this pos station

**Emulation\*:** Select Micros 4700 or MSI

**Interface\*:** Select the interface type (only TCP/IP available in this beta release)

**Timeout\*:** Enter the timeout value in seconds

##### TCP/IP Settings

**Remote IP\*:** Enter the remote IP (127.0.0.1 for local pc) for the external posting interface

**Remote Port\*:** Enter the remote port (default 1555) for the external posting interface

##### Serial Port Settings

**Comm Port\*:** Select the com port on the local PC that the null modem cable is connected to

**Bits Per Second\*:** The default setting for most systems in 9600 Bits Per Second

**Data Bits\*:** The default value of 8-bits is required by most external posting interfaces (10-bit word frames consisting of 1 start bit, 8 data bits and 1 stop bit)

**Stop Bits\*:** The default value of 1-bit is required by most external posting interfaces

**Parity\*:** Set to No parity check for most external posting interfaces

**FlowControl\*:** Set to None, as no flow control is generally required

##### Signature Slip Settings

**Room Charge Signature Slip Disclaimer 1:** Text to print immediately below signature line on the room charge signature slip - leave blank to omit

**Room Charge Signature Slip Disclaimer 2:** Text to print on 2nd line below signature line on the room charge signature slip - leave blank to omit

**Room Charge Auto Print Pending Signature Slip:** Set to Yes to print a signature slip immediately after the folios are retrieved

**Room Charge Auto Print Post Signature Slip:** Set to Yes to print a signature slip immediately after a successful post

##### Optional Room Card Settings (similar to gift card setup shown [here](#))

**Room Charge Card Start Sentinel:** Enter the character that indicates the start of the track

**Room Charge Card End Sentinel:** Enter the character that indicates the end of the track

**Room Charge Card Length:** Enter the length of the room number (maximum of 4 characters are sent to posting interface)

**Room Charge Card Start Position:** Enter the start position of the room number

**Room Charge Card Track:** Enter the track number that contains the room number

### Settle Screen Payment Method

In order to view the Room Charge button on the settle screen payment types list, navigate to **Back Office>Settings>Main Settings>Settle Screen** and un-tick the box under the Hide column next to the Room Charge row and click the Enter key on the keyboard. Click the Update Pos Stations at the top left so synchronize the database. A program restart may be required when changing this setting.

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
Payment Types	Currency Shortcuts	Foreign Currency	Cash Payouts	Local Payment Types

PAYMENT TYPES					
	DESCRIPTION ^	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON	OPEN DRAWER
	Account Payment	ACCOUNT PAYMENT	14	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Gratuity	ADD GRATUITY	3	<input type="checkbox"/>	<input type="checkbox"/>
	Cash	CASH	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Cash Bank	CASH BANK	9	<input type="checkbox"/>	<input type="checkbox"/>
	Cash Refund	CASH REFUND	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Check	CHECK	10	<input type="checkbox"/>	<input type="checkbox"/>
	Comp	COMP	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Credit Card	CREDIT CARD	2	<input type="checkbox"/>	<input type="checkbox"/>
	Credit Refund	CREDIT REFUND	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Debit Card	DEBIT CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
	Foreign Currency	FOREIGN CURRENCY	7	<input type="checkbox"/>	<input type="checkbox"/>
	Gift Card	GIFT CARD	4	<input type="checkbox"/>	<input type="checkbox"/>
	Gift Certificate	GIFT CERTIFICATE	5	<input type="checkbox"/>	<input type="checkbox"/>
	House Account	HOUSE ACCOUNT	8	<input type="checkbox"/>	<input type="checkbox"/>
	LOYALTY CARD	LOYALTY CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
	Manual Credit	MANUAL CREDIT	11	<input type="checkbox"/>	<input type="checkbox"/>
	Room Charge	ROOM CHARGE	6	<input type="checkbox"/>	<input type="checkbox"/>

**Settle Screen Room Charge Button Setting**

### Testing

Before testing, confirm that your Micros compatible property management system external posting interface is on-line and configured correctly. A separate session must be configured on your PMS for each terminal that is running the Amigo PMS interface. In AmigoPOS **Back Office>Settings>Hotel Interface**, click the **Test Settings** tab and enter a valid room number and the amount to charge. Click the Inquire button to retrieve the valid folios for the room. Click the Post button to post the transaction. The results appear above the room number field. A successful test transaction response is not saved in AmigoPOS database and should be voided or deleted from the property management system. Note that responses such as INVALID ROOM (room doesn't exist or is not occupied) or NO GUARANTEE (room does not have authorization for charge) indicate a successful configuration.

HOTEL INTERFACE SETTINGS

Settings Test Log

Room Num: 101 Get Folios

Folio: [dropdown arrow]

Post Type: Folio Charge [dropdown arrow]

Amount: 1.00 Post

Hotel Interface Test Screen

## 19.2 Usage

The room charge screen can be accessed on the order settlement screen payment types list or directly on the main screen under the Open Order buttons, as described in the [previous topic](#)<sup>794</sup>. If accessed from the main screen, the user is prompted to select an order before the room charge screen is displayed. If accessed from the settle screen, the room charge screen appears immediately. Room charges can only be posted for a valid order, but the charge amount and gratuity amount can be adjusted as necessary.

### Step 1: Room Lookup

Swipe the room/guest card or press the keyboard icon to enter the guest's room number to retrieve the active folios for the room.

ROOM CHARGE

ORDER NO 104633      \$14.00 BALANCE DUE

ENTER THE ROOM NUMBER

ENTER THE AMOUNT (LESS GRATUITY)

ENTER THE GRATUITY

CANCEL      SIGNATURE SLIP      CHARGE \$14.00

**Swipe the room card or press the button to enter the room number**

An error message will be displayed if an invalid room number is entered (INVALID ROOM) or if none of the room folios allow charges (NO GUARANTEE), which typically occurs for rooms paid in cash.

TRANSACTION RESULTS

**NO FOLIOS FOUND**

← TRY AGAIN

ORDER NUMBER	104634
BALANCE DUE	\$9.00

**Folio Lookup Error: Invalid Room Number**

**Step 2: Select Folio and Enter Amount**

Confirm that the correct folio is selected. The first folio on the list is selected by default, as it is the most common for restaurant charges. The guest may have additional folios for phone charges, mini-bar, etc also listed. The amount is filled in with the current balance due on the order and can be changed if necessary. If gratuities are in use or a signature slip is required, press the print signature slip button so that the customer can specify the gratuity and total. The preliminary signature slip has no effect on the order's balance due and the screen can be closed and opened at a later time to run the transaction again. If a signature slip is not required, verify that the gratuity amount is correct and press the green button to continue. Note that the signature slip will print automatically after the folios are retrieved if the **Room Charge Pending Signature Slip** setting is set to **Yes**.

ROOM CHARGE

ORDER NO 104633      \$14.00 BALANCE DUE

ENTER THE ROOM NUMBER

101

ENTER THE AMOUNT (LESS GRATUITY)

\$14.00

ENTER THE GRATUITY

\$0.00

SELECT THE FOLIO

1A: Smith, Joe      1B: Phone Folio

CANCEL      SIGNATURE SLIP      CHARGE \$14.00

Select the folio and enter the amount


**Step 3: Process Room Charge**


The final screen displays the order id, server, room number, amount (less gratuity), gratuity amount, and total. Press the process button to send the room charge transaction request to the property management system.

ROOM CHARGE


ORDER NO 104633      \$14.00 BALANCE DUE


ENTER THE ROOM NUMBER







ENTER THE AMOUNT (LESS GRATUITY)





ENTER THE GRATUITY








SELECT THE FOLIO

1A: Smith, Joe

1B: Phone Folio

CANCEL 

SIGNATURE SLIP 

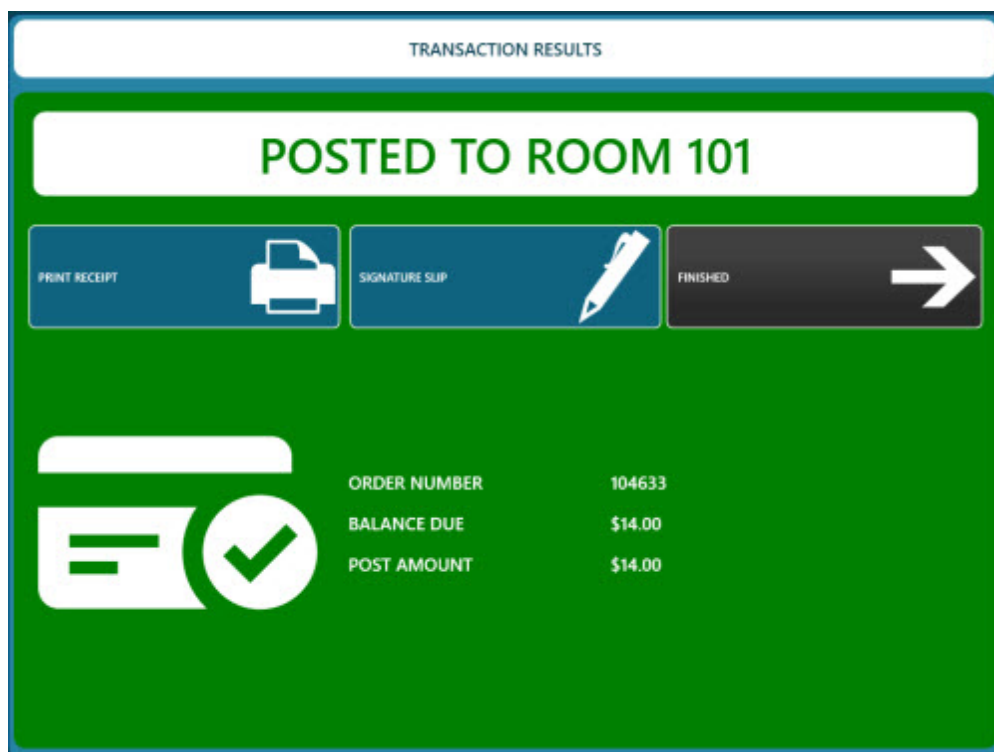
CHARGE \$14.00 

Verify that all information is correct before proceeding

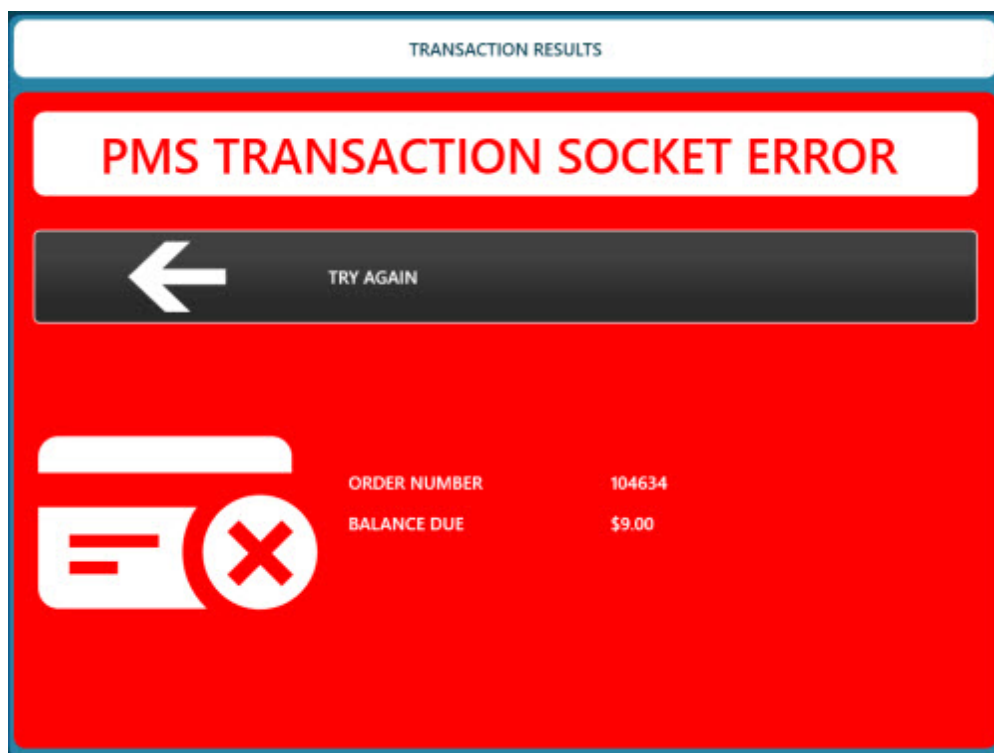
#### Step 4: Results

A response should be received within a few seconds. If successful, press the FINISHED button to close the room charge screen. If not, press the TRY AGAIN button to correct any errors (such as by selecting a different folio) and then process the room charge again. A signature slip with the gratuity amount and total can be printed at the local receipt printer if required. This signature slip can also be printed in **Back Office>Summary>Room Charges** (when back office is opening from the main screen). Note that the signature slip will print automatically after a successful post if the [Room Charge Post Signature Slip](#) <sup>794</sup> setting is set to **Yes**.





Successful Transaction Results



Transaction Error

## 19.3 Errors

### Response Errors

Various errors may occur when attempting to retrieve the folios or posting a charge. The error messages are standard errors and self explanatory, but should also be described in the property management system documentation. For example:

- **INVALID ROOM:** Verify that the room exists in the property management system configuration screen and that the room is occupied
- **NO GUARANTEE:** The room is not allowed to accept charges. This usually occurs when a room is paid in cash with no backup funding source (i.e. credit card). This may also occur for a folio that can only accept charges from a specific source (such as the phone folio)
- **NO AUTH:** The room is not authorized for charges to be posted

### Serial Communications Errors

Most errors are caused by mismatched baud, start bits, stop bits or parity. AmigoPOS will attempt to display the exact error, but that this not always possible. Timeout errors, where no response is received and no error message is shown, are almost always caused by a bad or disconnected serial cable.

- Use 9600 Baud with 10-Bit word frames (1 start bit, 1 stop bit and 8 data frames)
- Verify that the Windows Device Manager serial port settings at the POS Station and the PC running the external posting interface are identical
- Move the POS Station closer to the EPI computer and use a shorter cable to determine if excessive cable length is causing connectivity issues

### TCP/IP (Network) Errors

The most common network errors occur when a network connection is not available or the firewall is blocking the port set on the external posting interface and in AmigoPOS back office. When such an error occurs, the user will be prompted with a red "Connection Error" message. AmigoPOS will attempt the connection 20 times (or based on the timeout value) before the error is displayed.

The following is a list of common issues encountered when setting of the hotel interface:

- **IP address:** Verify that the IP address is correct by running the IPConfig application on the pc hosting the external hosting interface.
- **Port:** Verify that the remote port set in back office is identical to the port set in the external posting interface. In addition, no other program can use the same port.
- **Firewall:** temporarily disable the firewall on both the pc running AmigoPOS and the pc running the external posting interface. If communication error does not occur, enable the firewall on one pc at a time and add an exception for the remote port.
- **Router:** Open the network router configuration screen in a web browser and confirm that port forwarding is not enabled for the remote port.
- **Program Error:** Check the AmigoPOS program error log for any entry with a time stamp that coincides with the time that the connection error occurred.

Test In Progress

**CONNECTION ERROR**

Room Num:

Folio:


Post Type:


Amount:

Connection Error

TRANSACTION RESULTS

**PMS TRANSACTION SOCKET ERROR**





ORDER NUMBER	104634
BALANCE DUE	\$9.00

Folio Lookup Connection Error

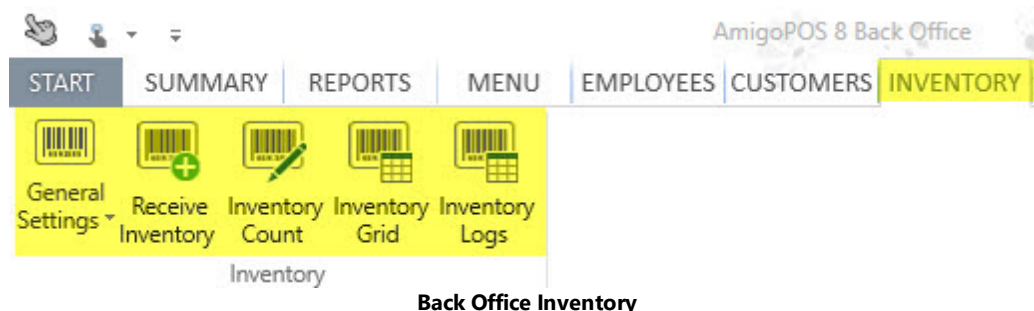
Part 20

# Inventory

## 20 Inventory

### 20.1 Inventory Items

AmigoPOS includes the ability to track inventory for all regular menu items, regular menu modifiers, bar menu items, bar menu modifiers, pizza sizes, pizza styles, pizza ingredients and retail items. Real-time inventory usage and stock for the current business day is available on the manager screen on a mini report formatted for the local receipt printer.



The inventory General Settings screen is divided into 6 tabs:

- [Inventory Items](#) <sup>806</sup>
- [Categories](#) <sup>808</sup>
- [Suppliers](#) <sup>809</sup>
- [Inventory Units](#) <sup>810</sup>
- [Inventory Locations](#) <sup>811</sup>
- [Menu Recipes](#) <sup>814</sup>

#### Inventory Items

Inventory items are listed in Back Office/Inventory/General Settings. Double click on the row header for any item to view the inventory item editor. Each inventory item is defined by the following fields:

- **Inventory Item Name:** Short name for use on mini-reports
- **Inventory Item Id:** Read-only value indicating the database table index of this item. Used when exporting data to accounting programs
- **Inventory Category:** The inventory category best described the item
- **Inventory Item Description:** A brief description of the item for reporting
- **Inventory Location:** The physical location of this item in storage
- **Inventory Retail Location:** The physical location of this item in on the sales floor (applies to retail items)
- **Retail Item:** This item is sold directly to the consumer and not used in product mixes
- **Supplier:** The primary supplier of this item
- **Secondary Supplier:** The backup supplier of this item
- **Disable:** Hide this inventory item
- **Inventory Unit:** The unit to use when listing the inventory item in reports or recipe definitions
- **Default Cost:** The current **cost per unit** that AmigoPOS will use to calculate the recipe cost for new inventory items or inventory items that have never been entered using the Inventory Received screen.
- **Items Per Pack:** The number of items per pack
- **Packs Per Case:** The number of packs per case
- **Unit SKU:** The SKU on a single unit containing this inventory item
- **Pack SKU:** The SKU on a single pack containing this inventory item
- **Case SKU:** The SKU on a single case containing this inventory item
- **Reorder Level:** The minimum quantity that must exist before an alert is generated
- **Maximum Quantity:** The maximum quantity that should be stocked before an alert is generated

- **Carry Out Only:** Only deduct from inventory for specific order types that are set to charge for containers. This feature is useful for disposable inventory items such as styrofoam cups, pizza boxes, etc where the item is not used for dine-in orders. Note that at least one [order type](#)<sup>[96]</sup> must be set to charge for containers (even if the container charge is zero) for this setting to take effect.

Click the Items tab to display the list of inventory items appears on the left. Any changes made in the inventory item editor on the right are applied immediately and a database update is not required to propagate the changes to the front of house.

AmigoPOS 8 Back Office

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS **INVENTORY**

General Settings Receive Inventory Inventory Count Inventory Grid Inventory Logs

**Items** Categories Units Suppliers Location Recipes

Order Settled | \$0.00 Since Last End Of Day

**INVENTORY SETTINGS**

Items Categories Units Suppliers Location Recipes

All Categories

New item name X +

Item name contains X

33 EXPORT X

5TH AVENUE CANDY BARS X

6PACK X

A LE COQ X

A MARCA BAVARIA X

ABBAYE DE LEFFE X

AFFLIGEM X

**Settings** Menu Items Received Usage

**General Settings**

Item Name	33 EXPORT
Category	BEER
Default Cost	18
Carry Out Only	No
Item Notes	
Unit Name	BOTTLE (BTL)
Item Type	Both
Last Updated	2009-03-09 7:51:51 PM

**Barcodes**

Unit SKU	0
Pack SKU	0
Case SKU	0

**Item Name**  
Enter the item name

Inventory Item editor

A new item can be added by entering the item name in the box and clicking the Add button. Verify that at least one inventory [category](#)<sup>[80]</sup>, inventory [supplier](#)<sup>[80]</sup>, inventory [location](#)<sup>[81]</sup> and inventory [unit](#)<sup>[81]</sup> is defined before attempting to add a new inventory item.

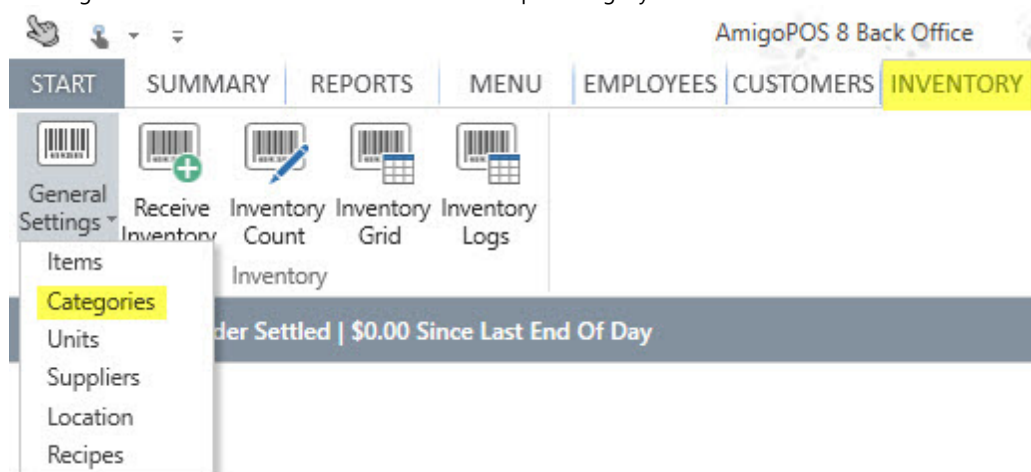
The screenshot shows the 'New Inventory Item Entry' form in the AmigoPOS 8 Back Office. At the top, there are tabs for 'Items', 'Categories', 'Units', 'Suppliers', 'Location', and 'Recipes'. Below these is a dropdown menu set to 'All Categories'. To the right of the dropdown are buttons for 'Settings', 'Menu Items', 'Received', and 'Usage'. Below the dropdown is a yellow input field labeled 'New Item name' with a minus sign and a plus sign button. To the right of this is a 'General Settings' section with a table containing the following data:

General Settings	
Item Name	33 EXPORT
Category	BEER

New Inventory Item Entry

### Inventory Categories

Multiple inventory categories should be defined for proper reporting and easier recipe entry. For enter a sufficient number of categories so that no more that 200 items exist per category.



INVENTORY SETTINGS

Items

Categories

Units

Suppliers

Location

Recipes

New category name X +

BAKED GOODS X

BEER X

CANDY BARS X

DAIRY X

DRINKS X

FROZEN X

MEAT X

OTHER X

PRODUCE X

General Settings

Category Name	BAKED GOODS
Markup	5
Disable	No

Category Name

Enter the inventory category name

Inventory Categories

### Inventory Suppliers

Inventory suppliers can be assigned to each inventory item for easy reordering. Each Supplier's address, phone number and hours of operation can be entered in the appropriate columns. This information is displayed on low stock level inventory alerts.

AmigoPOS 8 Back Office

START

SUMMARY

REPORTS

MENU

EMPLOYEES

CUSTOMERS

INVENTORY

General Settings

Receive Inventory

Inventory Count

Inventory Grid

Inventory Logs

Items

Categories

Units

Suppliers

Location

Recipes

Order Settled | \$0.00 Since Last End Of Day



**INVENTORY SETTINGS**

Items Categories Units **Suppliers** Location Recipes

New supplier name

ACME	<input type="button" value="X"/>
ALLIANCE	<input type="button" value="X"/>
BEER DISTRIBUTOR	<input type="button" value="X"/>
BEER DISTRIBUTOR	<input type="button" value="X"/>
GRF	<input type="button" value="X"/>
KCL	<input type="button" value="X"/>
KRAFT FOODS	<input type="button" value="X"/>
SYSCO FOODS	<input type="button" value="X"/>
TOPPS	<input type="button" value="X"/>

**General Settings**

Supplier Name	ACME
Disable	No
Address	
Phone	
Hours	
Additional Notes	
Preferred	No

**Supplier Name**  
Enter the inventory Supplier name

Inventory Suppliers

### Inventory Units

Inventory units are used to describe the quantity when entering recipes. Most retail items that are sold directly to the customer are sold as single units, described as Each in the list above. Other items that are mixed may be used by the ounce, dozen, gallon, etc. Enter the full name on the left and a short abbreviation in the right column; the abbreviation should be 3 characters or less to ensure that inventory mini reports print properly.

AmigoPOS 8 Back Office

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS **INVENTORY**

General Settings

Receive Inventory  Inventory Count  Inventory Grid  Inventory Logs

Items  
Categories  
**Units**  
Suppliers  
Location  
Recipes

Order Settled | \$0.00 Since Last End Of Day

**INVENTORY SETTINGS**

Items Categories **Units** Suppliers Location Recipes

New unit name

BOTTLE	<input type="button" value="X"/>
CAN	<input type="button" value="X"/>
CASE	<input type="button" value="X"/>
DOZEN	<input type="button" value="X"/>
EACH	<input type="button" value="X"/>
OUNCE	<input type="button" value="X"/>
PACK	<input type="button" value="X"/>
POUND	<input type="button" value="X"/>

**General Settings**

Unit Name	BOTTLE
Unit Abbreviation	BTL

**Unit Name**  
Enter the inventory unit name

Inventory Units

### Inventory Locations

Inventory locations (aisles) print on the physical inventory count sheet, making it easier to perform an inventory count. After entering the location names, change the value of the sort order column so that the locations appear in the desired order on the physical count sheet.

AmigoPOS 8 Back Office

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS **INVENTORY**

General Settings

Receive Inventory  Inventory Count  Inventory Grid  Inventory Logs

Items  
Categories  
Units  
Suppliers  
**Location**  
Recipes

Order Settled | \$0.00 Since Last End Of Day

**INVENTORY SETTINGS**

Items Categories Units Suppliers **Location** Recipes

New aisle name

AISLE 1	<input type="button" value="X"/>
AISLE 10	<input type="button" value="X"/>
AISLE 11	<input type="button" value="X"/>
AISLE 12	<input type="button" value="X"/>
AISLE 13	<input type="button" value="X"/>
AISLE 2	<input type="button" value="X"/>
AISLE 3	<input type="button" value="X"/>
AISLE 4	<input type="button" value="X"/>
AISLE 5	<input type="button" value="X"/>

**General Settings**

Location Description	AISLE 1
Disable	No
Back Room	No
Sort Order	1

**Location Description**  
Enter the inventory location description

Inventory Locations

## 20.2 Receiving Inventory

When inventory items are received, select the item from the list or scan the case barcode, enter the new quantity and click the Update button to increase the current and estimated quantities by the specified amount.

The value entered in the QTY field can be based on unit, pack or case. When scanning barcodes, this value is normally 1. The Total Cost value is used to calculate the unit cost on the inventory reports and is arrived at by the following formula:

When the QTY entered is for a Case:

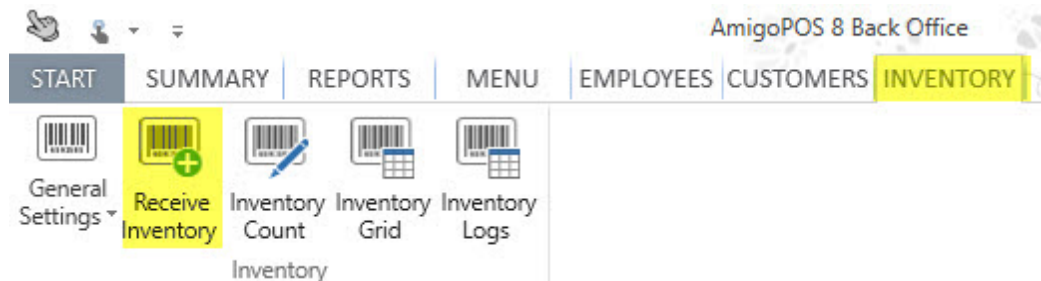
Total Cost = Unit Cost \* Items Per Pack \* Packs Per Case

When the QTY entered is for a Pack:

Total Cost = Unit Cost \* Items Per Pack

When the QTY entered is for a Unit:

Total Cost = Unit Cost



RECEIVE INVENTORY

Receive Inventory History

Scan the barcode, enter the SKU or select the item from the list

All Categories ▼

Barcode Barcode X 🔍

Enter text to filter list X

33 EXPORT  
5TH AVENUE CANDY BARS  
6PACK  
A LE COQ  
A MARCA BAVARIA  
ABBAYE DE LEFFE  
AFFLIGEM

Vendor ACME ▼

Quantity 0.00 ▼

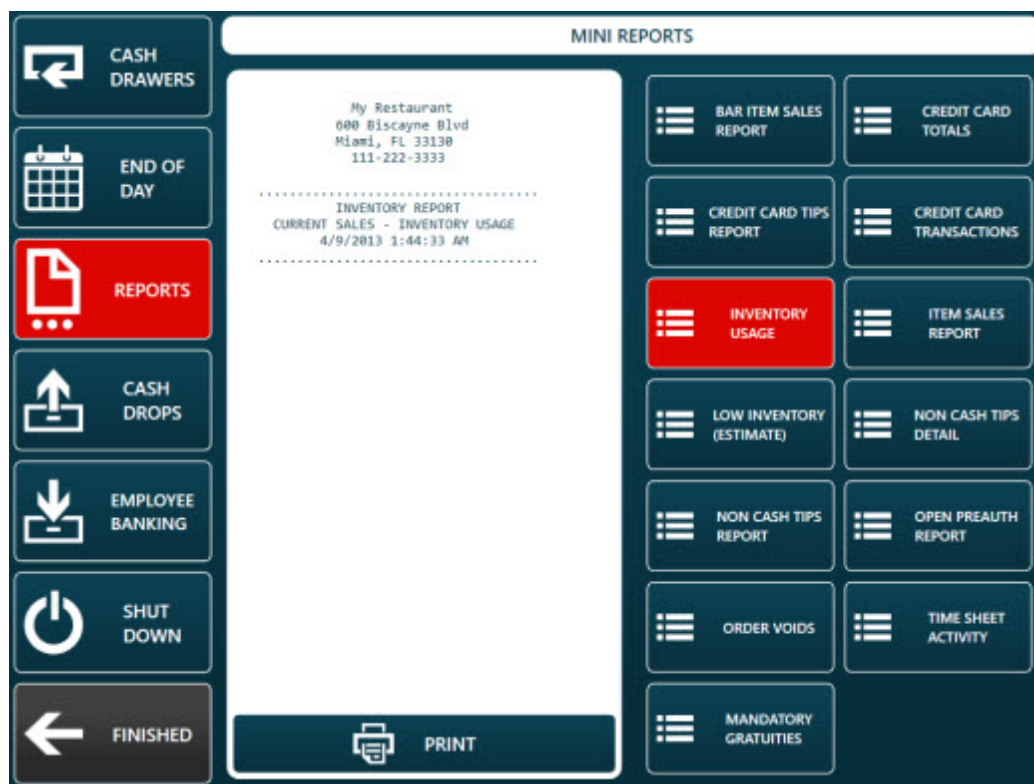
Invoice Number (optional) X

Total Cost 0.00 SAVE

Receive New Inventory

## 20.3 Inventory Usage

Inventory is updated in real time as orders are submitted or recalled. To view real time inventory usage, login and press the **Manager** button. Press the **Reports** button and select the **Inventory Usage** report to run report.



Inventory Usage Report (Manager Screen)

The mini report displays the current business day's inventory usage, including the quantity of each item used, the cost of each item used, and the total cost of all items used for the current business day. A current business day is defined as the period since the last [End Of Day](#) was run.

The item cost is calculating by multiplying the recipe quantity by the unit cost. The unit cost is found by one of the following methods:

1. The least recent inventory received record with remaining quantity.
2. If quantity is zero, the unit cost from the last time inventory item was received is used.
3. If the inventory item was never received, the default cost is used.

## 20.4 Menu Recipes

A recipe is defined for each menu item containing all inventory items and the quantity of each item used to prepare and package the item. The recipe for any regular menu item, regular menu modifier, bar menu item, bar menu modifier, pizza size, pizza style, or pizza ingredient can be edited by opening the menu item grid and clicking the **barcode icon** in the first column next to the item name.

The inventory icon shown below appears on the following grids and can be clicked to edit the menu recipe selected item:

- Regular Menu Items (includes retail items)
- Regular Menu Modifiers
- Bar Menu Items
- Bar Menu Modifiers

AmigoPOS 8 Back Office

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS **INVENTORY**

General Settings Receive Inventory Count Inventory Grid Inventory Logs

Items  
Categories  
Units  
Suppliers  
Location  
**Recipes**

Order Settled | \$0.00 Since Last End Of Day

**INVENTORY SETTINGS**

Items Categories Units Suppliers Location **Recipes**

Regular Menu Item 1/4 LB TURKEY BURGER (BURGERS)

**INVENTORY**

Items de Inventario

BAKED GOODS

HAMBURGER BUNS

HOTDOG BUNS

Qty Used 0.00 →

**Current Recipe**

Recipe Cost	\$0.81
Current Price	\$3.95
Markup	4.00
Suggested Price	\$3.23
Update Price	

**HAMBURGER BUNS**

Amount	Cost
1.00 EACH	\$0.21

**HAMBURGER PATTIES (80-20)**

Amount	Cost
1.00 EACH	\$0.60

Regular &amp; Bar Menu Items Inventory Recipe

When tracking inventory for a menu item, the menu item recipe should contain all of the inventory items required to produce 1 of the item. Select the inventory item from the list at the bottom and enter the amount used in the QTY Used box using either fractions or decimal format. Click the Add/Edit button to update the recipe. If a mistake is made when entering the amount, click the item on the list, enter the correct amount and click Add/Edit to update the recipe. The item can be permanently removed from the recipe by clicking the red button on the right side of the current recipe list.

For example, a **hamburger menu recipe** may include the following:

- 1/12 Hamburger Bun (Dozen)
- 1/10 Hamburger Each (10-Pack)
- 1/20 Lettuce Each (where Each refers to a head of lettuce)
- .01 Tomato Each
- .01 Onion Each

Retail items (menu items that do not require preparation) must also use a recipe for proper inventory. For example, a pack of chewing gum menu item must have a corresponding entry in the inventory items list. In general, the recipe will consist of a portion of a case.

For example, a menu recipe for a pack of chewing gum where 100 packs of gum are included in a single case may be similar to:

- .01 Chewing Gum Case

## 20.5 Bar Menu Upcharges

Bar menu item upcharges are used to modify a bar menu item. For example, the Top Shelf category in the AmigoPOS demonstration database contains the following upcharges:

1. DOUBLE
2. TRIPLE
3. UP
4. SHOT
5. TALL
6. SHORT



Bar Menu Upcharges

The first 2 upcharges, Double and Triple, affect the quantity of ingredients used in the recipe. The last 4 upcharges do not affect the main ingredients in the recipe. In order to properly calculate the quantity for an upcharge, a multiplier can be defined for each upcharge. In the following example, a generic Absolut Vodka drink uses .05/bottle (assuming 20 shots per 750ml bottle). When a double Absolut Vodka is ordered, the drink uses .1/bottle.

**INVENTORY SETTINGS**

Items Categories Units Suppliers Location **Recipes**

Bar Menu Item ABSOLUT (TOP SHELF)

**INVENTORY**

Items de Inventario

SPIRIT

Absolut 750mm

Qty Used 0.00

**Current Recipe**

Recipe Cost \$1.50

Current Price \$6.00

Markup 4.00

Suggested Price \$6.00

Update Price

**Absolut 750mm**

Amount	Cost
0.05 BOTTLE	\$1.50

Bar Menu Item Recipe

Upcharges are defined in the menu category editor (**Back Office > Menu > Menu Categories**). Select the bar menu category and scroll down to the Bar Menu Upcharges. In the case of the DOUBLE upcharge, set the value of the Upcharge 1 Inventory Adjustment to 2. This will double the quantity of all inventory items used in the bar menu item recipe.

Scroll down to Upcharge 2, TRIPLE, and set the value of Upcharge 2 Inventory Adjustment to 3. Note that the value can be entered as a decimal, so that the multiplier is less than 1 if the upcharge reduces the quantities used. For upcharges that do not affect quantity, use the **default value 1**.

Note that the limitation of this inventory adjustment method is that all of the bar menu item's inventory recipe ingredients are calculated using the multiplier, so that if the quantity of vodka and the quantity of iced is defined for a vodka and iced tea drink, a double vodka and iced tea will be calculated to use twice as much vodka and twice as much iced tea, even though in practice the same amount of iced tea is used. In addition, since AmigoPOS does not apply the upcharge to bar modifiers, the multiplier does not affect the recipe of bar modifiers.



**MENU CATEGORIES**

1 2 Bar Menu

Add new category X +

21 BOTTLE BEER L-Z

22 TOP 10

23 WINE

24 SHOTS

25 MARTINIS

26 MIXED DRINKS

27 TOP SHELF

28 WELL

Main Settings Menu Item Assignments Button

General Settings

Pricing

Day/Time Availability

Bar Menu Upcharges

Upcharge 1 Enabled	<input checked="" type="checkbox"/>
Upcharge 1 Description	DOUBLE
Upcharge 1 Prefix	DBL
Upcharge 1 Suffix	na
Upcharge 1 Inventory Adjustment	2
Upcharge 2 Enabled	<input checked="" type="checkbox"/>
Upcharge 2 Description	TRIPLE
Upcharge 2 Prefix	TRIP

**Upcharge 1 Inventory Adjustment**

Enter the multiplier to use when calculating the bar menu item inventory usage. Set to 1 if the upcharge does not affect the inventory.

Menu Category Editor

Part 21

# Loyalty Cards

## 21 Loyalty Cards

### 21.1 Overview

**Note:** as of this writing, only amount-based loyalty cards are integrated. Points-based cards are coming soon.

Loyalty cards and gift cards share common database table and can be used simultaneously so that the same card can function both as a loyalty card and gift card. When using both loyalty cards and gift cards, the card track settings must be identical, as set in **Back Office>Settings>Peripherals>Magnetic Card Reader>Card Specifications**. Encode the cards as shown [here](#) <sup>826</sup>

General Settings	
Card Reader Type*	Keyboard Wedge (USB or PS2)
Card Specifications	
Customer Account Card End Sentinel	?
Customer Account Card Start Sentinel	;
Employee Card End Sentinel	?
Employee Card Start Sentinel	%
Gift Card End Sentinel	?
Gift Card Start Sentinel	;
Customer Account Card Track	1
Employee Card Track	2
Gift Card Track	2

Gift Card End Sentinel  
Gift card end sentinel character

**Back Office>Settings>Peripherals**

#### Loyalty Card Type

Loyalty cards can be based on amount spent or menu item point value.

- **Amount** Amount-based loyalty cards are used to issue a reward or bonus based on the amount spent. Earned rewards can be redeemed on the settle screen.
- **Points** Points-based loyalty cards assign a reward or bonus point value to each menu item and a redemption point values to each menu item. For example, a small pizza may be assigned a rewards value of 10 points and a redemption value of 100 points so that the customer can receive 1 free small pizza for every 10 that are purchased.

#### Settings

- **Loyalty Card Amount Bonus:** When using amount based loyalty cards, enter the bonus value. For example, enter .05 to give a \$5 bonus for every \$100 spent.
- **Loyalty Card Bonus Deduct Discount:** Set to Yes to deduct discounts before calculating the bonus amount for loyalty card purchases.
- **Loyalty Card Bonus Include Delivery:** Set to Yes to include the delivery charge when calculating the bonus amount for loyalty card purchases.

- **Loyalty Card Bonus Include Gratuity:** Set to Yes to include the gratuity when calculating the bonus amount for loyalty card purchases.
- **Loyalty Card Bonus Include Surcharge:** Set to Yes to include the surcharge when calculating the bonus amount for loyalty card purchases.
- **Loyalty Card Bonus Include Tax:** Set to Yes to include tax when calculating the bonus amount for loyalty card purchases.
- **Loyalty Card Type:** Select the calculation method (described above).

ORDER ENTRY SCREEN SETTINGS

Discounts	
Regular Menu	
Bar Tabs	
Loyalty Cards	
Loyalty Card Amount Bonus	0.05
Loyalty Card Bonus Deduct Discount	Yes
Loyalty Card Bonus Include Delivery	Yes
Loyalty Card Bonus Include Gratuity	Yes
Loyalty Card Bonus Include Surcharge	Yes
Loyalty Card Bonus Include Tax	Yes
Loyalty Card Type	Amount
Loyalty Card Service	Local Database
Order Entry Buttons	
Cloud Service	
Bar Menu Settings	

**Loyalty Card Amount Bonus**  
When using amount based loyalty cards, enter the bonus value. For example, enter .05 to give a \$5 bonus for every \$100 spent.

Back Office/Settings/Main Settings/Order Entry Screen

### Payment Method

If the loyalty card type is set to Amount, enable the **LOYALTY CARD** payment method to allow customers to redeem the value.

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
Payment Types	Currency Shortcuts	Foreign Currency	Cash Payouts	Local Payment Types

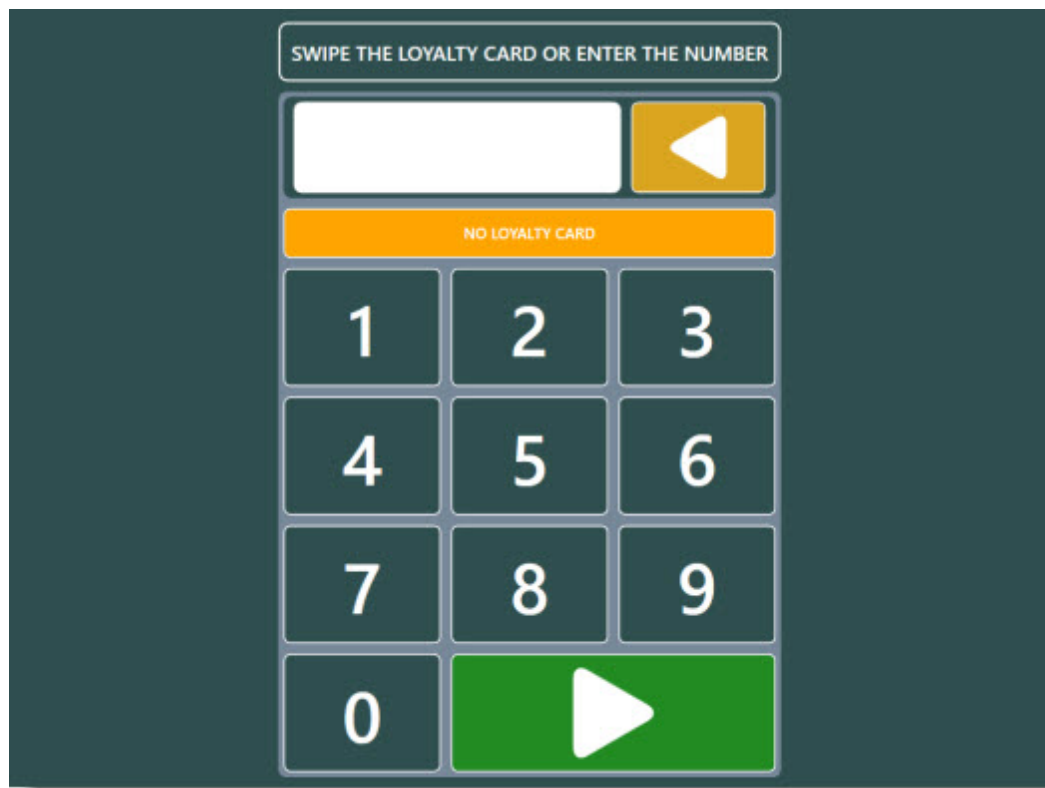
  

PAYMENT TYPES					
	DESCRIPTION	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON	OPEN DRAWER
	Check	CHECK	10	<input type="checkbox"/>	<input type="checkbox"/>
	Comp	COMP	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Credit Card	CREDIT CARD	2	<input type="checkbox"/>	<input type="checkbox"/>
	Credit Refund	CREDIT REFUND	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Debit Card	DEBIT CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
	Foreign Currency	FOREIGN CURRENCY	7	<input type="checkbox"/>	<input type="checkbox"/>
	Gift Card	GIFT CARD	4	<input type="checkbox"/>	<input type="checkbox"/>
	Gift Certificate	GIFT CERTIFICATE	5	<input type="checkbox"/>	<input type="checkbox"/>
	House Account	HOUSE ACCOUNT	8	<input type="checkbox"/>	<input type="checkbox"/>
	LOYALTY CARD	LOYALTY CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
	Manual Credit	MANUAL CREDIT	11	<input type="checkbox"/>	<input type="checkbox"/>
	Room Charge	ROOM CHARGE	6	<input type="checkbox"/>	<input type="checkbox"/>

Back Office/Settings/Main Settings/Settle Screen

### Order Entry Screen Prompt

**Prompt For Loyalty Card:** Each order type can be set to prompt the user to swipe the card before the order is started.



Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
General Settings	Sales Tax	<b>Order Types</b>	Order Entry	User Interface

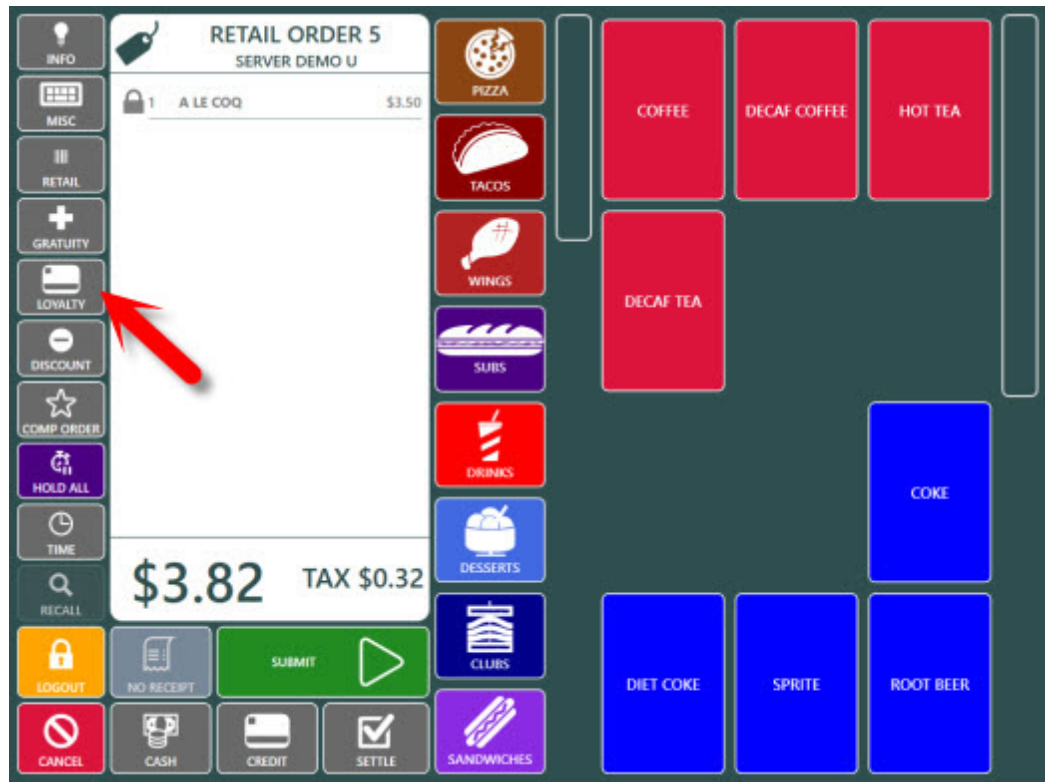
  

ORDER TYPE SETTINGS																											
<div>  BAR         </div> <div>  COUNTER         </div> <div>  DELIVERY         </div> <div>  DINE-IN         </div> <div>  DRIVE-THRU         </div> <div>  PICK-UP         </div> <div>  RETAIL         </div>	<div> <b>General Settings</b> <table border="1"> <tr><td>Order Type Name</td><td>COUNTER</td></tr> <tr><td>Hide Button At All Stations</td><td><input type="checkbox"/></td></tr> <tr><td>Hide Button At This Station*</td><td><input type="checkbox"/></td></tr> <tr><td>Button Position</td><td>5</td></tr> <tr><td>Charge Takeout Containers</td><td><input type="checkbox"/></td></tr> <tr><td>Default Menu Category</td><td>DRINKS</td></tr> <tr><td>Print Suggested Gratuities</td><td><input checked="" type="checkbox"/></td></tr> <tr><td><b>Loyalty Card Prompt</b></td><td><input checked="" type="checkbox"/></td></tr> </table> </div> <div> <b>Surcharges</b> <table border="1"> <tr><td>Surcharge Text</td><td>SURCHARGE</td></tr> <tr><td>Surcharge Type</td><td></td></tr> <tr><td>Surcharge Amount</td><td>0</td></tr> <tr><td>Surcharge Tax Rate</td><td>9% [ID:1/Sales Tax]</td></tr> </table> </div> <div> <b>Mandatory Gratuity</b> <table border="1"> <tr><td>Mandatory Gratuity</td><td><input type="checkbox"/></td></tr> </table> </div> <div> <b>Loyalty Card Prompt</b>            Show the loyalty card prompt immediately after the order type is selected         </div>	Order Type Name	COUNTER	Hide Button At All Stations	<input type="checkbox"/>	Hide Button At This Station*	<input type="checkbox"/>	Button Position	5	Charge Takeout Containers	<input type="checkbox"/>	Default Menu Category	DRINKS	Print Suggested Gratuities	<input checked="" type="checkbox"/>	<b>Loyalty Card Prompt</b>	<input checked="" type="checkbox"/>	Surcharge Text	SURCHARGE	Surcharge Type		Surcharge Amount	0	Surcharge Tax Rate	9% [ID:1/Sales Tax]	Mandatory Gratuity	<input type="checkbox"/>
Order Type Name	COUNTER																										
Hide Button At All Stations	<input type="checkbox"/>																										
Hide Button At This Station*	<input type="checkbox"/>																										
Button Position	5																										
Charge Takeout Containers	<input type="checkbox"/>																										
Default Menu Category	DRINKS																										
Print Suggested Gratuities	<input checked="" type="checkbox"/>																										
<b>Loyalty Card Prompt</b>	<input checked="" type="checkbox"/>																										
Surcharge Text	SURCHARGE																										
Surcharge Type																											
Surcharge Amount	0																										
Surcharge Tax Rate	9% [ID:1/Sales Tax]																										
Mandatory Gratuity	<input type="checkbox"/>																										

Back Office/Settings/Main Settings/Order Types

**Order Entry Screen Loyalty Card button**

The **LOYALTY** button on the order entry screen can be used to assign a loyalty card after the order is started. If the loyalty card type is set to Amount, the button will display the rewards earned for the current order. If the loyalty card type is set to Points, the button will display the total points earned for the current order. Press the button to view the historical usage.



**Order Entry Screen Loyalty Button**

Deliveries   Settle Screen   Manager Screen   Time Clock   Employee Banking

General Settings   Sales Tax   Order Types   **Order Entry**   User Interface

**Order Entry Screen**   Retail   Removed Items   Void Reasons   Age Verification

### ORDER ENTRY SCREEN SETTINGS

Order Entry Buttons	
Fixed Gratuity Amount 1	0
Fixed Gratuity Amount 2	0.15
Fixed Gratuity Amount 3	0.2
Fixed Gratuity Amount 4	-1
Guest Check Item Name Width	15
Guest Check Width	42
Menu Categories Width	18
Button Image Size To Fit	No
Order Entry Screen Add Note Button	Yes
Order Entry Screen Cancel Button	Yes
Order Entry Screen Cash Button	Yes
Order Entry Screen Change Table Button	Yes
Order Entry Screen Comp Order Button	Yes
Order Entry Screen Credit Button	Yes
Order Entry Screen Discount Button	Yes
Order Entry Screen Edit Customer Button	Yes
Order Entry Screen Gratuity Button	Yes
Order Entry Screen Hold All Button	Yes
Order Entry Screen Info Button	Yes
Order Entry Screen Logout Button	Yes
<b>Order Entry Screen Loyalty Button</b>	<b>Yes</b>

**Order Entry Screen Loyalty Button**  
Set to No to hide the loyalty button on the order entry screen.

Back Office/Settings/Main Settings/Order Entry Screen



CARD STATUS	
CARD SWIPE	12345
DATE ISSUED	2/11/2016
SOLD BY	DEMO USER
CUSTOMER	
ACCRUED	\$0.00
REDEEMED	\$0.00
REMAINING	\$0.00

CHANGE LOYALTY CARD      FINISHED

Loyalty Card Info

## 21.2 Sample Loyalty Card Configuration

Gift, loyalty and employee access cards can be issued and managed in house so there is no need for an external program. The following guidelines should be used when ordering cards and apply to gift cards, loyalty cards and employee access cards.

Cards must be encoded on track1 **AND** track 2, similar to the example below. Track 3 can also be used, but not necessary. If using a 3rd party to encode your cards, obtain & test a sample card before all of the cards are encoded. The card printing company can test a card before encoding the entire batch by downloading an evaluation version of AmigoPOS. Be sure to request a test card to verify that it is properly encoded before ordering the cards.

+++++  
Sample track1&2 for card #10000105:

**%G5    GIFT OR LOYALTY CARD            10000105?;10000105?**

In the example shown above:

- track 1 start sentinel is **%**
- track 1 end sentinel is **?**
- track 1 data is **G5 GIFT OR LOYALTY CARD    10000105**
- track 2 start sentinel is **;**
- track 2 end sentinel is **?**
- track 2 data is **10000105**

The tracks and start/end sentinels are configured in Back Office/Settings/Peripherals/Magnetic Card Reader as described in the [magnetic card reader configuration](#) help topic.

Part 22

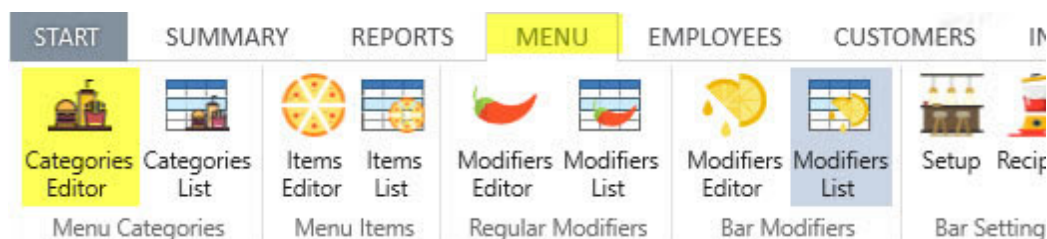
# Menu Setup and Usage

## 22 Menu Setup and Usage

### 22.1 Menu Categories

The regular menu includes any regular or retail item that should appear on the order entry screen. AmigoPOS can support an unlimited number of menu categories. Each menu category can have an unlimited number of menu items and each menu item can have an unlimited number of modifiers. Changes in the menu category editor are saved automatically by changing rows or pressing the Enter key on the keyboard.

Menu categories are defined in Back Office/Menus/. Add a new menu category at the top of the editor by entering the new category name and clicking the Add button. Menu categories can be set to appear only between certain hours of the day or on certain days of the week. For example, the Seafood category can be limited to Friday evenings between 4 and 11 PM. If menu categories should always appear, regardless of time of day, set the Time On value equal to the Time Off value and check the boxes for all 7 days of the week.



**Menu Categories Editor**

General Settings	
Category Name	PIZZA
Button Position	1
Menu Type	Regular Menu
Web Description	PIZZA (NEW)
Visibility	Visible
Hide Button At This Station	<input type="checkbox"/>
Availability	In-Store & Web
Retail Category	<input type="checkbox"/>
Visible Columns	3
Visible Rows	4
Minimum Age Verification	18

**Category Name**  
The name that appears on the menu category button and reports. Each category must have a name (do not leave blank)

**Menu Categories Editor**

The following values can be modified to customize each category:

### **General Settings**

- **Menu Category Name:** The name that appears on the menu category button and reports. Each category must have a name (do not leave blank).
- **Button Position:** The relative position that the category appears on the order entry screen
- **Menu Type:** Specify whether this category is for regular or bar menu items
- **Web Description:** Specify the text to appear below the category name on the web site settings page
- **Visibility:** The category button's visibility on the order entry screen. The button can be visible, hidden, or act as a spacer to separate the the previous and next category
- **Availability:** Specify if the menu category is available in-store only, web only or both

### **Pricing**

- **Inventory Markup:** This value is used when calculating the recommended price on the inventory recipe editor (only for menu items in this category)
- **Exclude From Special Pricing:** Check the box to exclude all menu items in this category from special pricing
- **Exclude From Event Pricing:** Check the box to exclude all menu items in this category from event pricing
- **Takeout Non-Taxable:** Check the box to charge no tax on any item in this menu category for order types that are set to charge for takeout containers

### **Day/Time Availability**

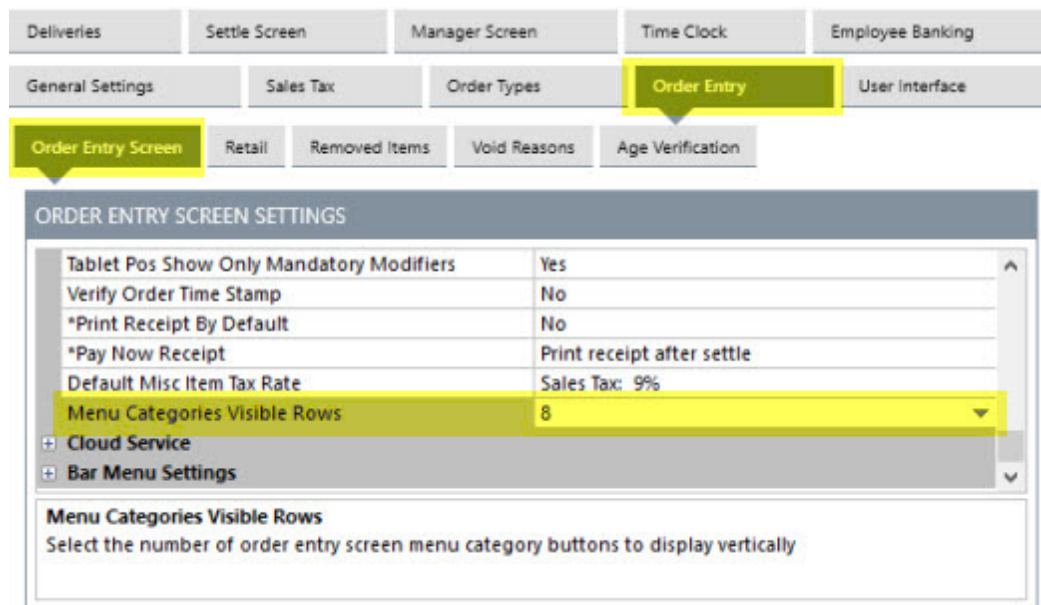
- **Time On:** Enable this menu category after the specified time. Set the value equal to the Time Off value if the menu category is always available.
- **Time Off:** Disable this menu category after the specified time. Set the value equal to the Time On value if the menu category is always available.
- **Day 1:** Enable this menu category on the first day of the week (Day 1 is replaced by the name of the first day of the week as determined by the local system settings, i.e. Sunday in the United States)
- **Day 2:** Enable this menu category on the second day of the week
- **Day 3:** Enable this menu category on the third day of the week
- **Day 4:** Enable this menu category on the fourth day of the week
- **Day 5:** Enable this menu category on the fifth day of the week
- **Day 6:** Enable this menu category on the sixth day of the week
- **Day 7:** Enable this menu category on the seventh day of the week

### **Button Size**

The number of visible menu category buttons can be adjusted in **Back Office>Settings>Main Settings>Order Entry**. When there are 10 or few categories, enter the value equal to the number of menu categories to hide the scrollbar. If there are more than 10 categories, set the value to a number between 5 and 15, depending on the screen resolution and the desired button size.



8 Menu Category Buttons Visible

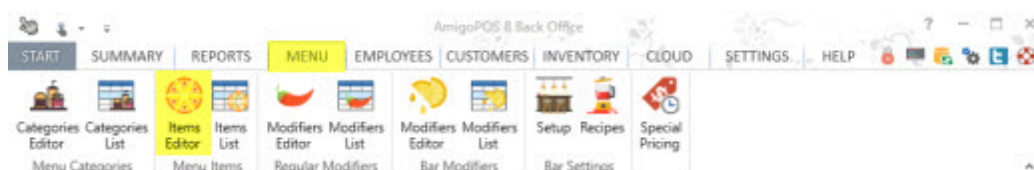


Back Office&gt;Settings&gt;Main Settings&gt;Order Entry

## 22.2 Regular Menu

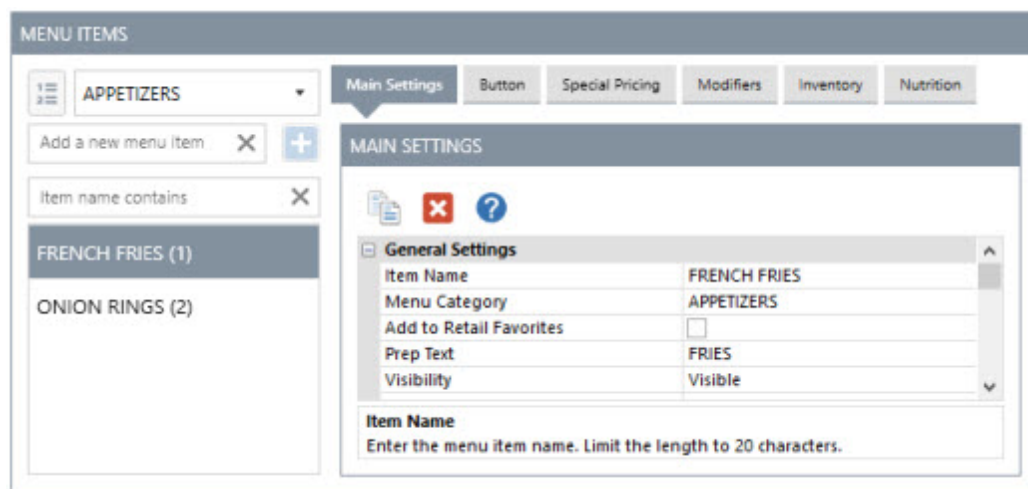
### 22.2.1 Menu Item Editor

AmigoPOS includes support for an unlimited number of menu items per menu category. Regular menu items include any categorized button or retail item defined by a SKU, sold by price per weight or sold by PLU. Bar menu items are also configured using the same menu item editor but differ in that modifier groups are not used for bar menu items and each bar menu item offers upcharge pricing. Refer to the [bar menu](#) topic for additional information.



Back Office Menu Items Editor

To add a new menu item, enter the menu item name, select a menu category and click **Add**: to save the new menu item. Some menu items may use the same prep printers, pricing, special pricing, optional group assignments and button appearance as existing menu items. In that case, select the existing menu item and choose **Copy Selected** to copy all settings from an existing item to a new menu item. Review the values under the **Main Information** tab. If an existing menu item was not copied, all values are default (most common) and may require modification.



Menu Items Editor

Click the Pricing tab to change regular and special pricing. Ensure that the price, container charge and tax rate are correct. Loyalty card point value, redemption value and special price definitions should also be modified if necessary. The following fields are available under the **Pricing** tab:

- Price
- Container
- Tax Rate

Special price rules can be added or edited by clicking the Special Pricing tab.

Method	Special Price	Percent Off	Day	Start
+ Click here to add a new row				
Percentage	\$25.00	25 %	All	12:00 AM

Special Price Definitions Grid

Click the **Add New** button to add a new special price definition or double-click on an existing rule to edit. Special prices can be fixed or calculated as a percentage. The special price may be active every day or on a single day of the week. For special prices that are not active every day but are active on more than one day, enter a new identical special price definition for each active day. The special price definition can be temporarily disabled, if necessary. The special price definition can be permanently deleted by clicking the **Delete Selected** button. The Day of Week value is calculated from the Windows time (starting at midnight), not the business day start time.

Note: If multiple special price definitions are active at the same time, the first price rule will take precedence.

**Special Price Definition**

**French Fries**

Pricing Method: Set Price

Price:

☐ Apply discount to modifiers

Day Of Week: All Days

Start Time: 12:00 AM

End Time: 12:00 AM

☐ Disable this special price definition

Cancel Save

Special Price Definition

Retail items are menu items that may contain a barcode that can be scanned, a random weight barcode that contains the item price, or may be sold by weight or quantity (i.e. produce). Click the Retail Pricing tab to configure retail price options for the menu item. The following fields are available under the **Pricing** tab:

- SKU
- Price By Weight
- Fraction
- Suffix
- PLU (Price By Weight)
- PLU (Price By Quantity)
- QTY (Price By Quantity)

The screenshot shows the 'MENU ITEMS' interface. On the left, there's a list of menu items under the 'APPETIZERS' category, including 'FRENCH FRIES (1)' and 'ONION RINGS (2)'. The main area is titled 'MAIN SETTINGS' and has several tabs: 'Main Settings', 'Button', 'Special Pricing', 'Modifiers', 'Inventory', and 'Nutrition'. The 'Special Pricing' tab is selected, and the 'Pricing' sub-tab is active. The 'Pricing' section contains the following fields and values:

Price	1.75
Tax Rate	9% [ID:1/Sales Tax]
Revenue Center	FOOD
SKU	0
Retail Inventory	<a href="#">Add Inventory Item</a>
PLU	0
Sold By Weight	<input type="checkbox"/>
Price By Weight Multiplier	1
Price By Weight Suffix	
Container Charge	0
Exclude From Special Pricing	<input type="checkbox"/>
Exclude From Event Pricing	<input type="checkbox"/>
Exclude From Discounts	<input type="checkbox"/>
Exclude From Combos	<input type="checkbox"/>

Below the table, there's a section titled 'Exclude From Discounts' with the text: 'Set to Yes to exclude this menu item when calculating discounts'.

**Retail Item Options**

Menu item availability may be restricted by day of week. To disable a menu item on specified days, check the box next to **Restrict Days** and uncheck the box next to any day that the menu item should not appear when the parent category is selected on the order entry screen.



**MENU ITEMS**

APPETIZERS

Add a new menu item

Item name contains

FRENCH FRIES (1)

ONION RINGS (2)

**MAIN SETTINGS**

Pricing

Online Ordering

Prep Printers

Label Printers

**Day/Time Availability**

Time On	00:00
Time Off	00:00
Restrict Days	<input type="checkbox"/>
Sunday	<input type="checkbox"/>
Monday	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>
Thursday	<input type="checkbox"/>
Friday	<input type="checkbox"/>
Saturday	<input type="checkbox"/>

**Time On**  
Enable this menu item after the specified time. Set equal to Time Off value if the menu item is always available.

#### Day of Week Restrictions

Menu item [modifiers](#)<sup>840</sup> may be shared between menu items while still allowing customization for each menu item. To add a new modifier group assignment, select the modifier group from the Modifier Group heading on the top row and click Enter. The database will be updated with the new modifier group assignment. Select the value for Sort order that indicates the position of the optional group relative to the menu item's other assigned optional groups. When this menu item is selected on the order entry screen, mandatory modifiers appear first followed by the remaining optional groups in ascending numeric order.

**MENU ITEMS**

BURGERS

Add a new menu item

Item name contains

B-B-Q BURGER (0)

¼ LB TURKEY BURGER (1)

½ LB BURGER (2)

BACON BURGER (5)

MUSHROOM BURGER (7)

SWISS BURGER (8)

LITE BURGER (9)

**MODIFIER GROUPS**

New Modifier Group

Add Group: ADD ICE CREAM TO PIE 1

**BURGER TOPPINGS**  
POSITION 1 (EXCLUSIVE)

Remove Copy Optional Up Down

**BURGER TOPPINGS**  
POSITION 2

Remove Copy Optional Up Down

**REMOVE BURGER TOPPINGS**  
POSITION 3

Remove Copy Optional Up Down

**BURGER BUN OPTIONS**  
POSITION 4

Remove Copy Optional Up Down

**BURGER PREP OPTIONS**

### Modifier Assignments

Prep printer assignments are made by checking the box next to the specified prep or label printer. Disabled or inactive printers appear in red. The MS Windows printer name appears next to each remote printer, which may be different on other pos stations. The MS Windows printer name is shown for reference only and does not affect the remote printer assignment.

**MENU ITEMS**

BURGERS

Add a new menu item

Item name contains

- B-B-Q BURGER (0)
- ¼ LB TURKEY BURGER (1)
- ½ LB BURGER (2)
- BACON BURGER (5)
- MUSHROOM BURGER (7)
- SWISS BURGER (8)
- LITE BURGER (9)

**MAIN SETTINGS**

Pricing

Online Ordering

**Prep Printers**

Prep Printer	Check
Prep Printer 1	<input checked="" type="checkbox"/>
Prep Printer 2	<input type="checkbox"/>
Prep Printer 3	<input type="checkbox"/>
Prep Printer 4	<input type="checkbox"/>
Prep Printer 5	<input type="checkbox"/>
Prep 6	<input type="checkbox"/>
Prep 7	<input type="checkbox"/>
Prep 8	<input type="checkbox"/>
Prep 9	<input type="checkbox"/>
Prep 10	<input type="checkbox"/>

Label Printers

Day/Time Availability

**Prep Printer 1**

Check the box to print this menu item at Prep Printer 1

Prep Printers

Click the menu item's inventory shortcut to modify the recipe for the menu item. A menu item's recipe consists of all raw ingredients and materials used to prepare the item. Select the inventory item name from the drop-down list, enter the quantity used and click the Add/Edit button to update the database. The recommended price is based on the total cost of all items in the recipe multiplied by the **Inventory Suggested Price Markup**, the amount by which to multiply the recipe cost to arrive at the suggested price. Inventory items can be added by selecting **General Settings** > **Inventory Items** from the **Inventory** shortcut button group.

**MENU ITEMS**

BURGERS

Add a new menu item

Item name contains

- B-B-Q BURGER (0)
- ¼ LB TURKEY BURGER (1)
- ½ LB BURGER (2)
- BACON BURGER (5)
- MUSHROOM BURGER (7)
- SWISS BURGER (8)
- LITE BURGER (9)

**INVENTORY**

Items de Inventario

BAKED GOODS

HAMBURGER BUNS

Qty Used 0.00

HOTDOG BUNS

**Current Recipe**

Item	Amount	Cost
Recipe Cost		\$0.81
Current Price		\$4.50
Markup		4.00
Suggested Price		\$3.23

Update Price

**HAMBURGER PATTIES (80-20)**

Item	Amount	Cost
HAMBURGER PATTIES (80-20)	1.00 EACH	\$0.60

**HAMBURGER BUNS**

Item	Amount	Cost
HAMBURGER BUNS	1.00 EACH	\$0.21

Menu Item Inventory Editor

### 22.2.2 Menu Items List

The menu items list displays all regular menu items in an editable data grid for performing quick updates. All changes are saved immediately with a confirmation displayed in the bottom status bar and changes take effect at the pos at the next [database update](#)<sup>596</sup>.

MENU ITEMS LIST

REGULAR MENU

REFRESH

PRICE COLUMNS

PRINTER COLUMNS

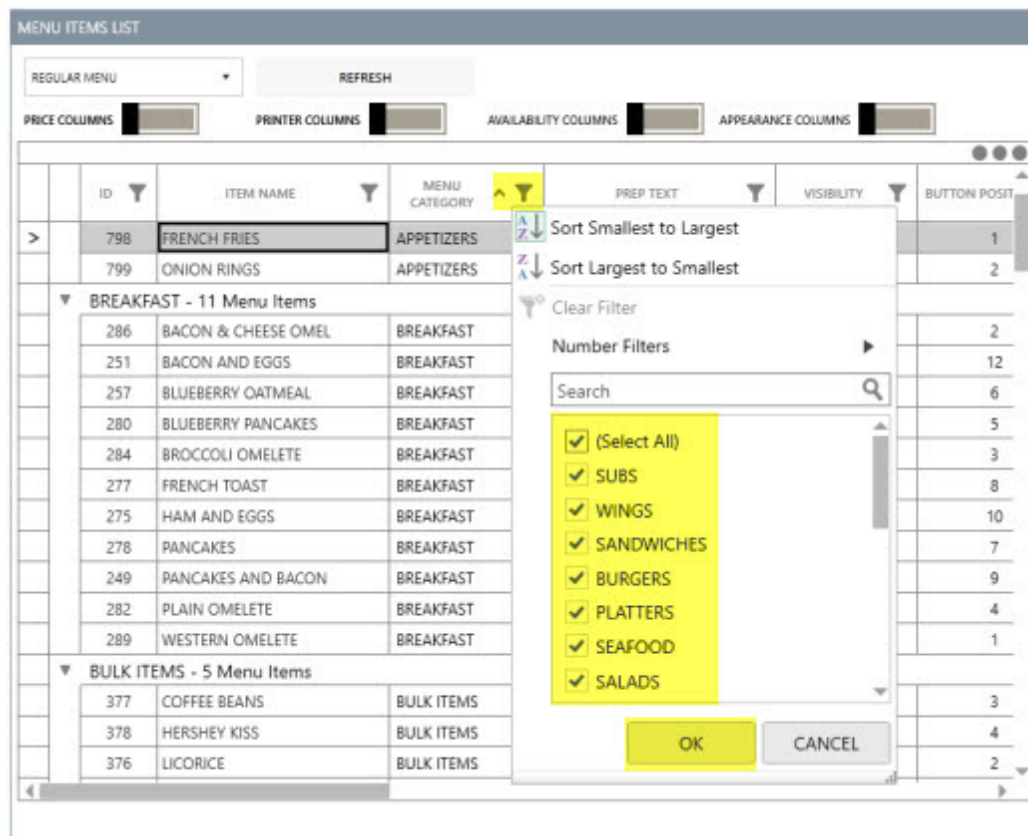
AVAILABILITY COLUMNS

APPEARANCE COLUMNS

	ID	ITEM NAME	MENU CATEGORY	PREP TEXT	VISIBILITY	BUTTON POSIT
Click here to add a new row						
APPETIZERS - 2 Menu Items						
	798	FRENCH FRIES	APPETIZERS	FRIES	VISIBLE	1
	799	ONION RINGS	APPETIZERS	ORINGS	VISIBLE	2
BREAKFAST - 11 Menu Items						
	286	BACON & CHEESE OMEL	BREAKFAST	BAC+CH OMEL	VISIBLE	2
	251	BACON AND EGGS	BREAKFAST	EGGS+BAC	VISIBLE	12
	257	BLUEBERRY OATMEAL	BREAKFAST	BB OATMEAL	VISIBLE	6
	280	BLUEBERRY PANCAKES	BREAKFAST	BB PCAKES	VISIBLE	5
	284	BROCCOLI OMELETE	BREAKFAST	BROCC OMELE	VISIBLE	2

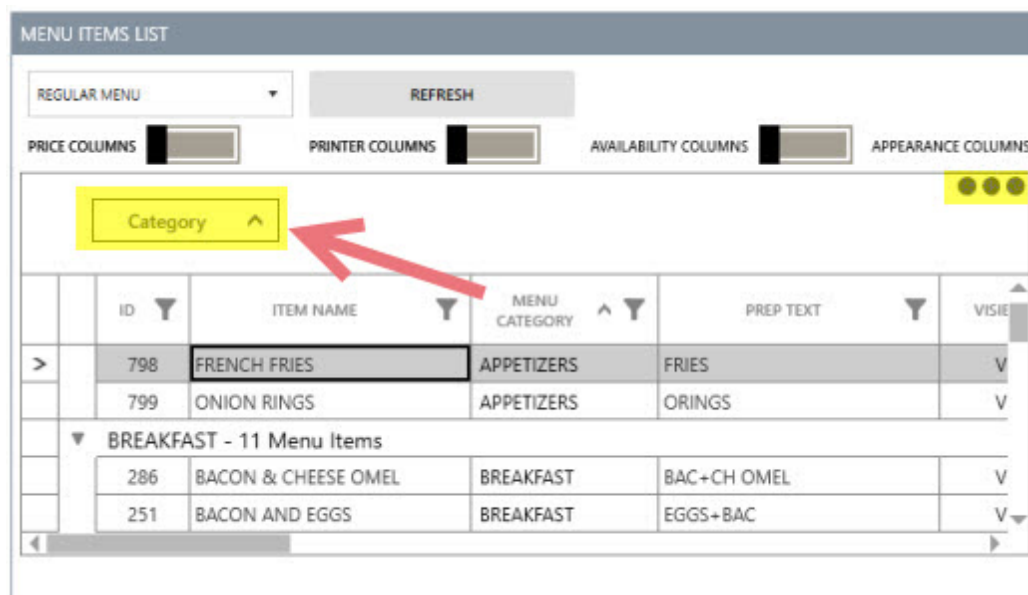
Menu Items List

The list can be filtered by clicking the filter icon at the top of any column. In the example below, the checkbox next to any menu category can be cleared to exclude items from the list.



Column Filter

The list can be grouped by any column. Toggle the group area button at the top right and drag a column header to the group area. Click the X to removed the group.



The list can be sorted by one or more columns. In the example below, the list is first sorted in ascending order by menu category name and in descending order by SKU.

	ID	ITEM NAME	MENU CATEGORY	PREP TEXT	VISIE
>	275	HAM AND EGGS	BREAKFAST	HAM+EGGS	V
	278	PANCAKES	BREAKFAST	PCAKES	V
	249	PANCAKES AND BACON	BREAKFAST	PCAKE+BAC	V
	282	PLAIN OMELETE	BREAKFAST	PL OMEL	V
	289	WESTERN OMELETE	BREAKFAST	WSTRN OMEL	V
▼ APPETIZERS - 2 Menu Items					
	798	FRENCH FRIES	APPETIZERS	FRIES	V

New menu items can be added by clicking the top row. Enter the item name and click enter to add the item to the list.

	ID	ITEM NAME	MENU CATEGORY	PREP TEXT	VISIE
+ Click here to add a new row					
▼ WINGS - 11 Menu Items					
>	314	100 WINGS	WINGS	WNGS 100	V
	313	50 WINGS	WINGS	WNGS 50	V
	316	B-B-Q DOUBLE WINGS	WINGS	BBQ WING x2	V
	315	B-B-Q SINGLE WINGS	WINGS	BBQ WING x1	V
	317	B-B-Q TRIPLE WINGS	WINGS	BBQ WING x3	V

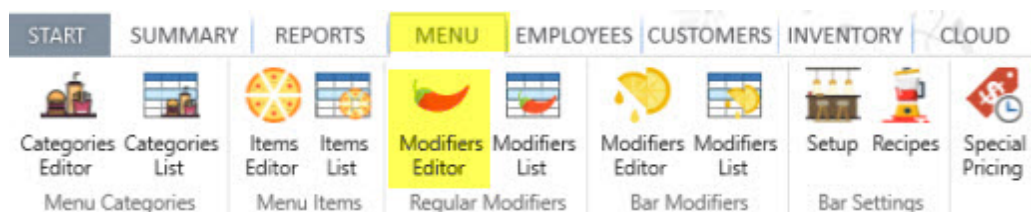
Less commonly used columns are hidden by default for better performance. The columns can be enabled by checking the box next to the column description.

MENU ITEMS LIST						
REGULAR MENU		REFRESH				
PRICE COLUMNS		PRINTER COLUMNS		AVAILABILITY COLUMNS		APPEARANCE COLUMNS
	ID	ITEM NAME	MENU CATEGORY	PREP TEXT	VISIBILITY	BU
+ Click here to add a new row						
▼ WINGS - 11 Menu Items						
>	314	100 WINGS	WINGS	WNGS 100	VISIBLE	
	313	50 WINGS	WINGS	WNGS 50	VISIBLE	
	316	B-B-Q DOUBLE WINGS	WINGS	BBQ WING x2	VISIBLE	
	315	B-B-Q SINGLE WINGS	WINGS	BBQ WING x1	VISIBLE	
	317	B-B-Q TRIPLE WINGS	WINGS	BBQ WING x3	VISIBLE	

### 22.2.3 Modifiers

Each regular menu item can have an unlimited number of modifier groups and unlimited modifiers per group. In addition, each group can be defined by 5 price levels that can be used to adjust the modifier item's normal price. Each price level may be used to adjust the price up, down or no change. For example, **EXTRA** may add to the price of a modifier item, while **NO** may decrease the price of the modifier. Other modifier levels, such as **LIGHT**, are used as descriptors and do not change the price of the modifier.

Note that most menu items in the same menu category will share the same modifier groups. For example, all menu items in the Burgers category in the demo database share the same modifier groups. The entire menu category was created in less than 10 minutes by entering one new menu item (CLASSIC BURGER) and assigning the modifier groups. The menu item was then copied multiple times and the menu item copies were simply renamed and the price was adjusted for each item.

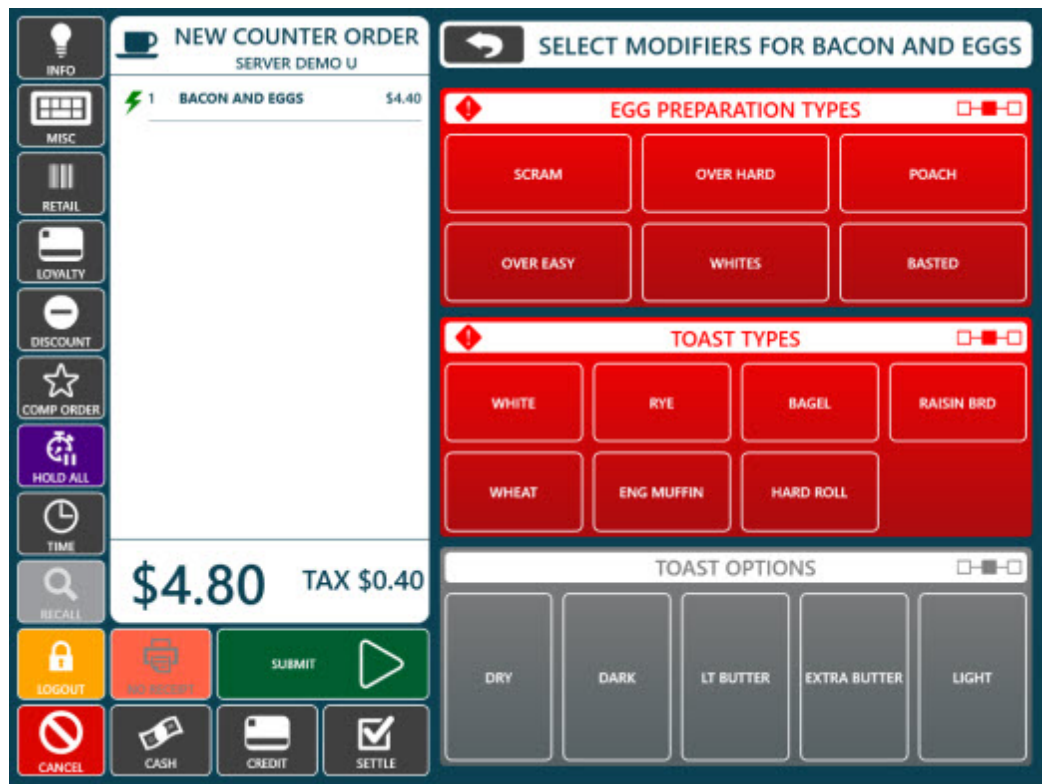


Back Office Modifiers Editor

- [Modifier Groups](#) <sup>840</sup>
- [Menu Item Assignments](#) <sup>843</sup>
- [Modifiers](#) <sup>844</sup>
- [Modifier Levels](#) <sup>846</sup>
- [Copy Menu Item Assignments](#) <sup>848</sup>
- [Button Placement and Sizing](#) <sup>849</sup>

#### Modifier Groups

Modifier groups are used to combine individual modifier items on the order entry screen. Three modifier groups are shown in the image below: EGG PREPARATION TYPES, TOAST TYPES and TOAST OPTIONS. The modifier groups with a red background are set to mandatory and exclusive, where the user must select one and only one modifier from each group before continuing. The TOAST OPTIONS modifier group is set to exclusive but not mandatory so that the user is not forced to select a modifier from the group and only one selection is possible.



**Modifier Groups on the Order Entry Screen**

### Modifier Group Settings

All settings for each modifier group are set in the modifier groups editor except for the MANDATORY setting, which is set for each menu item in the menu item editor, so that a single modifier group can be shared by many menu items.



**MODIFIERS**

Modifier Groups | Modifier Levels

New modifier group name [X] [+] [?] [X]

Name contains [X]

ADD ICE CREAM TO PIE

ADDITIONAL SANDWICH BREAD OPTIONS

ADDITIONAL SANDWICH OPTIONS

ADDITIONAL SUB OPTIONS

ADDITIONAL WRAP TOPPINGS

BREAD OPTIONS

BREAKFAST MEAT PREPARATION

BURGER ADD-ONS

Group Settings | Modifiers | Menu Items

Settings | Appearance

**General Settings**

Description	ADD ICE CREAM TO PIE
Exclusive	<input checked="" type="checkbox"/>
Modifiers Included	0
Prefix	-
Maximum Allowed	0
Prevent Duplicate Modifier Levels	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Inventory Markup	4
Modifier Button Rows	1
Buttons Per Row	5

**Modifier Button Rows**  
Select the number of rows to use for this modifier group. Note that modifier buttons are ordered vertically.

### Modifier Groups

- **Description:** Enter a brief description to appear on the order entry screen
- **Exclusive:** Check the box to allow only one modifier to be selected from this group
- **Modifiers Included:** The first x number of modifiers are free before charging for additional modifiers. Set to zero to charge for all modifiers.
- **Prefix:** When more than one menu item is included as a combo, enter the prefix for this modifier group. For example, when selling 2 pizzas for 1 price, enter P1 to alert the kitchen staff that this modifier group belongs to pizza 1.
- **Maximum Allowed:** This value determines the total number of modifiers that can be selected. For example, if set to 1, one whole or two half pizza styles in the pizza styles modifier group can be selected. Set to 0 to ignore this value.
- **Prevent Duplicate Modifier Levels:** Set this value to Yes to set the modifier levels as exclusive. For example, if the modifier levels for the pizza styles modifier group are TOP and BOTTOM, set to yes to prevent two styles from being selected for TOP.
- **Disable:** Check the box to hide this modifier group on the order entry screen
- **Inventory Markup:** Enter the value to use when calculating the suggested price on the inventory screen.
- **Modifier Button Rows:** Select the number of rows to use for this modifier group. Note that modifier buttons are ordered vertically.
- **Buttons Per Row:** Select the number of visible buttons per row. The scroll bar will appear automatically if the buttons exceed the number of rows multiplied by this value.
- **Modifier Level 1:** Select a modifier level from the drop-down list to appear in the 1st button position
- **Modifier Level 2:** Select a modifier level from the drop-down list to appear in the 2nd button position
- **Modifier Level 3:** Select a modifier level from the drop-down list to appear in the 3rd button position
- **Modifier Level 4:** Select a modifier level from the drop-down list to appear in the 4th button position
- **Modifier Level 5:** Select a modifier level from the drop-down list to appear in the 5th button position

- **Modifier Type:** For use with the online web ordering interface only. Specify whether to use check boxes or radio buttons.

The modifier group default behavior allows the user to select multiple modifiers from each group. In addition, modifier groups can be set to Mandatory, Exclusive, or both Mandatory & Exclusive:

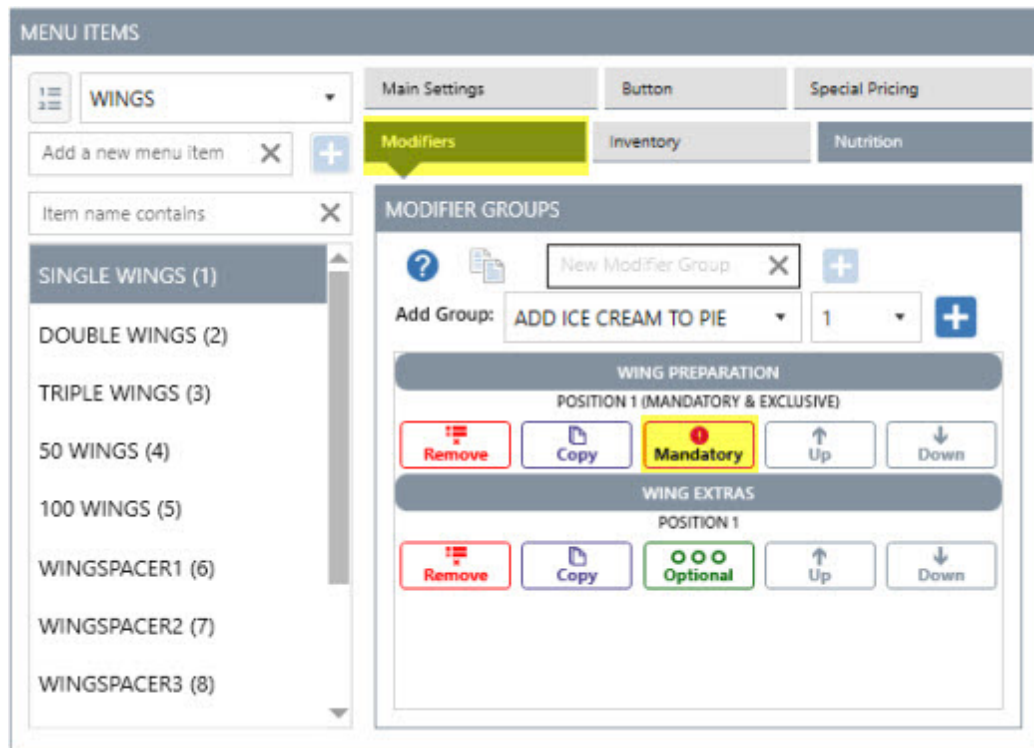
- **Default:** A selection is not required from this modifier group. Multiple modifier items can be selected from this modifier group.
- **Mandatory:** At least one item must be selected from this modifier group. The mandatory setting is applied at the menu item level so that the modifier group can be mandatory for some menu items and optional for others.
- **Exclusive:** Only one item can be selected from this modifier group.
- **Mandatory & Exclusive:** A maximum of one item must be selected from this modifier group.

Exclusive modifier groups are defined by checking the box next to the Exclusive field on the Modifier Groups list. Only one item from this group may be selected for a single menu item, regardless of the number of modifier items added to this group. An exclusive modifier group is indicated by the red and gray icon on the order entry screen, as shown below. One example of an exclusive modifier group is egg preparation option which may be either scrambled, fried or basted. The server should not be able to select more than one modifier from the group.

### Menu Item Assignments

Modifier groups are assigned to each menu item in the menu item editor. Select the menu item and click the Modifier Assignments tab. A drop-down list displays all active modifier groups. Select the modifier group and click Add. Note that the same modifier group can be assigned more than once if required.

Mandatory modifier groups are defined at the menu item level. For example, the server may be required to specify whether the Chicken Wings should be hot, medium or mild, but may not be required to specify whether a Hamburger should be prepared rare, medium or well. In the case, the modifier group will be set to **Mandatory & Exclusive** for the Chicken Wings but **Exclusive** for the Hamburger. To set a modifier group as mandatory for a specific menu item, click the Modifier Assignments tab and click the Optional link for the modifier group so that it is displayed as Mandatory (red icon). In the image below, Wing Preparation modifier group is set to mandatory.



Mandatory &amp; Exclusive Modifier Group

### Modifiers

To add more modifiers to an existing modifier group, click the Modifier Items tab, select the modifier group and click the Modifiers tab and enter the modifier item name next to the **Add:** button. After the modifier is saved, enter any additional information such as prep text and price.

**MODIFIERS**

Modifier Groups    Modifier Levels

New modifier group name X +

Name contains X

ADD ICE CREAM TO PIE

ADDITIONAL SANDWICH BREAD OPTIONS

ADDITIONAL SANDWICH OPTIONS

ADDITIONAL SUB OPTIONS

ADDITIONAL WRAP TOPPINGS

BREAD OPTIONS

BREAKFAST MEAT PREPARATION

BURGER ADD-ONS

Group Settings    **Modifiers**    Menu Items

New modifier name X +

SCOOP CHOC

SCOOP VAN

SCOOP MINT CH

SCOOP STRW

SCOOP FUDGE

Settings    Appearance    Inventory

General Settings

Button Text	SCOOP CHOC
Button Position	1
Prep Text	SCOOP
Visibility	Visible

Pricing

Regular Price	1
Revenue Center	FOOD

**Button Text**

Enter a brief description to appear on the order entry screen button and customer receipts

Modifiers

Modifier item buttons are similar to menu item buttons with a wide range of customizable features including button color, button theme and button image.

- **Button Text:** Enter the text to display on the button and print on the customer receipt
- **Button Position:** Select the numeric order for the button to appear on the list. Note that this value
- **Prep Text:** Enter the text to print on the prep ticket and/or remote display
- **Visibility:** Set the value to visible, hidden or spacer. A spacer is used to hide the button but insert a space between the previous modifier button from the next modifier button.
- **Regular Price:** Enter the price before any modifier level is selected
- **Inventory Setup:** A recipe can be assigned to each modifier item to properly track inventory usage

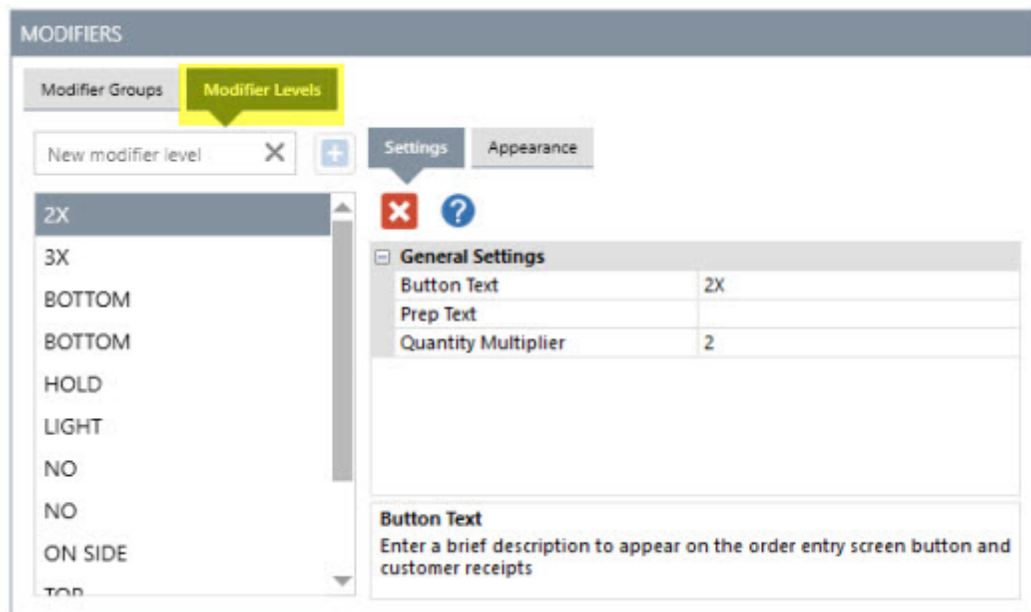
If the modifier group has associated price levels, enter the price level for each modifier item in the group. Price levels that have a negative price (decrease the price of the menu item) will appear enclosed in parentheses. When entering a negative price, use the negative sign on the keyboard, i.e. -.50. An unlimited number of modifier items may be assigned to each modifier group. If more than 5 items are added to a single group, an arrow button will appear on the order entry screen that allows the server to simultaneously view 24 modifiers buttons in an expanded panel.



Modifier Group Scroll Bar

### Modifier Levels

Select any modifier group to edit the settings or to assign modifier levels. If a modifier group has price levels, define the button text that should appear on the button by clicking the Modifier Levels tab. Similar to the modifier items, new modifier levels can be added by entering the modifier level name in the box at the top. An unlimited number of modifier levels may be defined, but only 5 may be assigned to a single modifier group.



Modifier Levels

- **Button Text:** Enter a brief description to appear on the order entry screen button and customer receipts
- **Prep Text:** Enter the text to appear on prep tickets (text appears as prefix to modifier text). Leave blank to use the button text.

- **Quantity Multiplier:** Enter the quantity adjustment. For example, if the modifier level is ½, enter .5 so so that the modifier is properly counted. This value is also used for inventory adjustment.

Click the Modifier Group Settings tab to select the new modifier levels from the drop-down lists next to **Modifier Level** fields 1-5.

The screenshot shows the 'MODIFIERS' interface. On the left, there's a list of modifier groups: BURGER ADD-ONS, BURGER BUN OPTIONS, BURGER CHEESE OPTIONS, BURGER PREP OPTIONS, BURGER SIDE ORDERS, BURGER TOPPINGS, BURGER TOPPINGS (highlighted), and CHEESE. Above this list is a search bar 'Name contains' and a '+ New modifier group name' button. On the right, there's a 'Group Settings' tab selected, with sub-tabs 'Settings' and 'Appearance'. Under 'Settings', the 'General Settings' section is expanded, showing 'Modifier Levels' with five levels and their corresponding options: Modifier Level 1 (NO), Modifier Level 2 (HOLD), Modifier Level 3 (ON SIDE), Modifier Level 4 (XTRA), and Modifier Level 5 (LIGHT). Below this, the 'Web Orders' section is also expanded, showing 'Modifier Level 1'.

**Modifier Price Level Assignments on the Modifier Group List**

The price for each modifier level is set for each individual modifier. After assigning the modifier level(s) to the modifier group, click the Modifiers tab. Expand the Pricing settings and set the price for each level.

**MODIFIERS**

Modifier Groups    Modifier Levels

New modifier group name X +

Name contains X

ICE CREAM ADD-ONS

ICE CREAM FLAVOR

JUICE FLAVOR

LG PIZZA STYLE

**LG PIZZA TOPPINGS**

MED PIZZA STYLE

MED PIZZA TOPPINGS

OMELETE CHEESE

OMELETE EXTRAS

OMELETE PREPARATION

Group Settings    **Modifiers**    Menu Items

New modifier name X +

BROCCOLI

JALAPENOS

SAUSAGE

PINEAPPLE

MUSHROOMS

GREEN PEPPER

EXTRA CHEESE

RED PEPPERS

ANCHOVIES

CHIVES

Settings    Appearance    Inventory

General Settings

**Pricing**

Regular Price	1.75
TOP Price	0.875
BOTTOM Price	0.875
2X Price	3.5
3X Price	0
NO Price	0

Revenue Center    FOOD

**TOP Price**  
Enter the price to charge for this modifier when modifier level 1 is selected

Modifier Level Pricing

Modifier level buttons appear above the modifier item buttons on the order entry screen. To enable a different price level for a modifier item, select the modifier level button first, then select the modifier. If a mistake is made, press the **Refresh** button to deselect all modifier level buttons.

**BURGER TOPPINGS**

NO    HOLD    ON SIDE    XTRA    LIGHT

ONIONS    B-B-Q SAUCE    MUSTARD

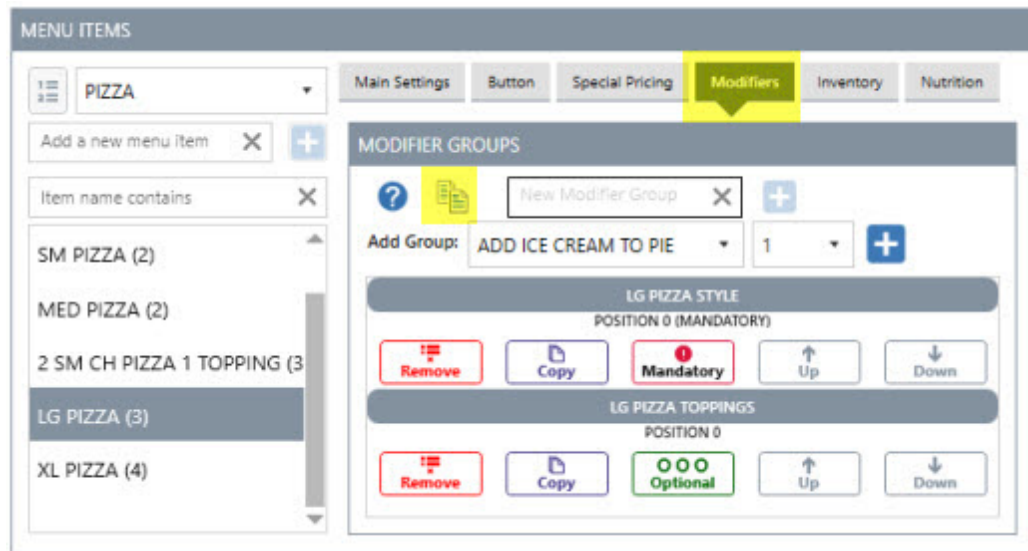
MUSHROOM    CATSUP    PICKLES

Modifier Price Levels

### Copy Menu Item Assignments

In many menu designs, all menu items in a menu category will share the same modifier group assignments. For example, all dinner entrees may include the choice of potato, soup or salad, etc. In this case, modifier group assignments can be copied to all menu items in the current menu item's category by opening the menu item in the menu item editor. Click the Modifier Assignments tab and click **Copy To All**. A list of all menu items in the current menu items category is shown. Click Yes to confirm. **All existing modifier group assignments for the other menu**

items in the same category are deleted and the current list of modifier groups, including the sort order and mandatory status of each group, is copied to each of the other menu items in the same category.



**Copying Modifier Group Assignments**

### Button Placement and Sizing

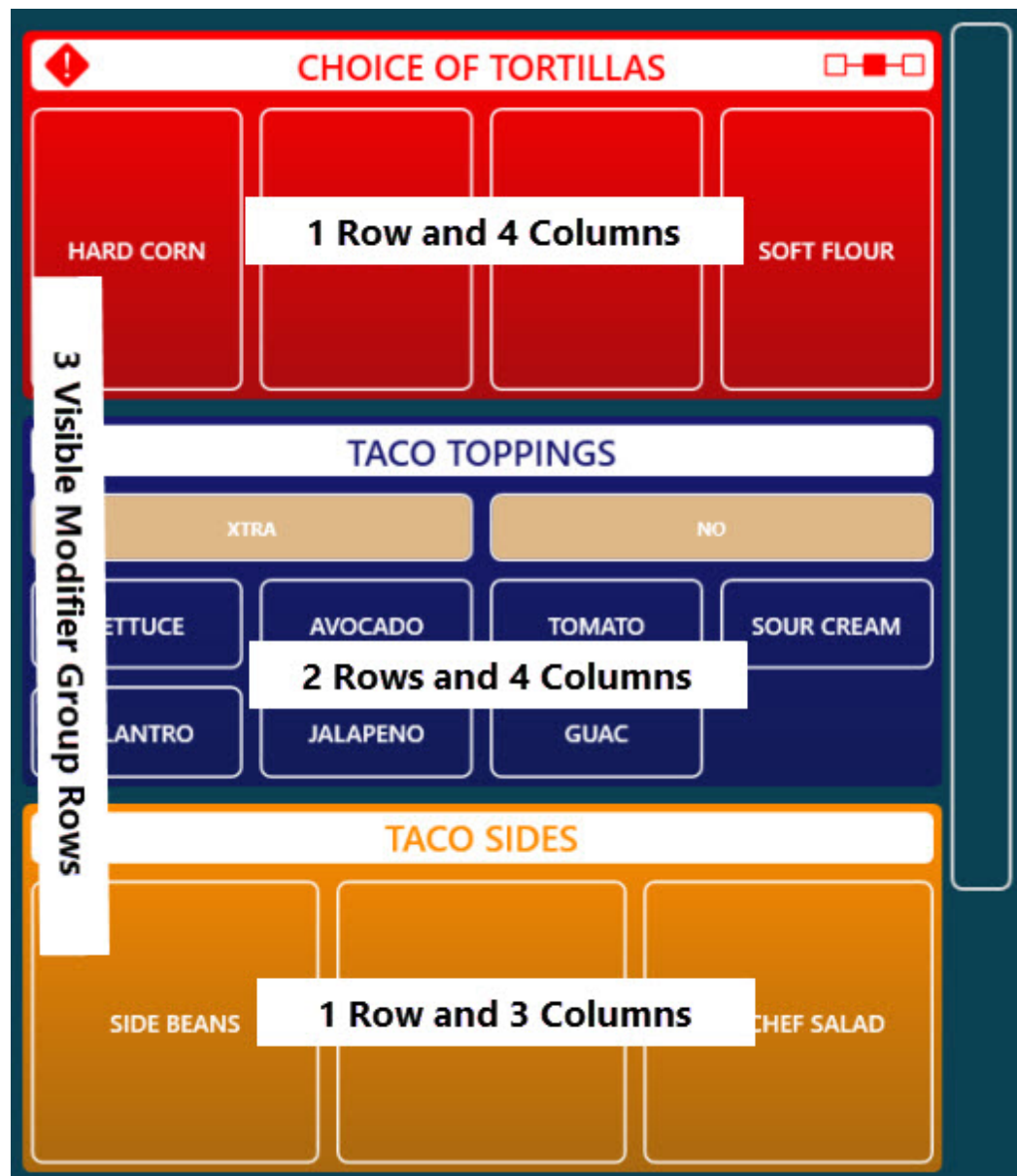
For single row modifier groups, modifier buttons are positioned horizontally according to the button position setting. When multiple rows are defined, the buttons are placed vertically as in the image below.



**Modifier Button Placement**

Each modifier group can be customized by setting the number of visible rows and columns. Visible rows and columns define the number of buttons that can appear simultaneously on the screen before scrolling to view additional buttons. In addition, the number of visible modifier groups is set for each menu item so that menu items with a single large modifier group can display all of the modifier buttons without scrolling.





Order Entry Screen Modifiers

The **Modifier Button Rows** and the **Buttons Per Row** settings on the Modifier Groups settings grid are set once per modifier group and are always applied regardless of the menu item.

**MODIFIERS**

Modifier Groups | Modifier Levels

New modifier group nar X +

Name contains X

**ADD ICE CREAM TO PIE**

ADDITIONAL SANDWICH BREAD OPTIONS

ADDITIONAL SANDWICH OPTIONS

ADDITIONAL SUB OPTIONS

ADDITIONAL WRAP TOPPINGS

BREAD OPTIONS

BREAKFAST MEAT PREPARATION

BURGER ADD-ONS

Group Settings | Modifiers | Menu Items

Settings | Appearance

**General Settings**

Description	ADD ICE CREAM TO PIE
Exclusive	<input checked="" type="checkbox"/>
Modifiers Included	0
Prefix	-
Maximum Allowed	0
Prevent Duplicate Modifier Levels	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Inventory Markup	4
Modifier Button Rows	1
Buttons Per Row	5

**Modifier Button Rows**  
Select the number of rows to use for this modifier group. Note that modifier buttons are ordered vertically.

**Modifier Group Row and Column Settings**

**Modifier Button Rows:** Select the number of rows to use for this modifier group. Note that modifier buttons are ordered vertically.

**Buttons Per Row:** Select the number of visible buttons per row. The scroll bar will appear automatically if the buttons exceed the number of rows multiplied by this value.

The **Modifier Groups Visible Rows** setting is applied for each menu item on the menu item editor. Select the number of modifier groups to appear when this menu item is selected (the modifier screen height is divided by this number to determine the modifier group height). Four modifier groups are assigned to the menu item shown in the image above. Three groups are visible and the fourth group is accessed with the scroll bar.

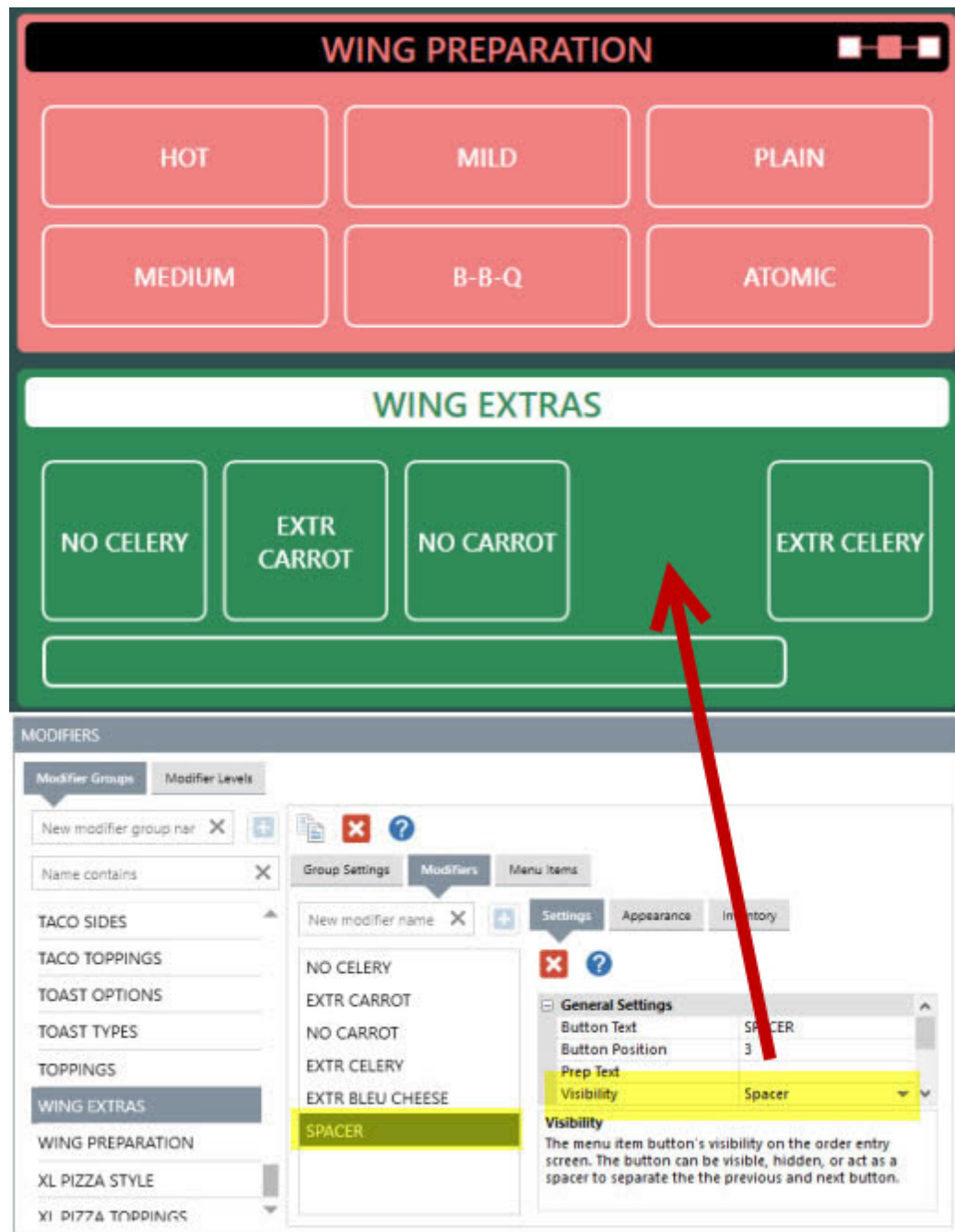
The screenshot displays the 'MENU ITEMS' editor for 'SINGLE WINGS'. On the left, a list of menu items includes 'SINGLE WINGS (1)', 'DOUBLE WINGS (2)', 'TRIPLE WINGS (3)', '50 WINGS (4)', '100 WINGS (5)', 'WINGSPACER1 (6)', 'WINGSPACER2 (7)', and 'WINGSPACER3 (8)'. The 'MAIN SETTINGS' tab is active, showing a table of configuration options:

General Settings	
Item Name	SINGLE WINGS
Menu Category	WINGS
Add to Retail Favorites	<input type="checkbox"/>
Prep Text	WINGS x1
Visibility	Visible
Button Position	1
Availability	In-Store & Web
Modifier Groups Visible Rows	3
Pricing	
Online Ordering	
Web Price	5

Below the table, a section titled 'Modifier Groups Visible Rows' explains: 'Select the number of modifier groups to appear when this menu item is selected (the modifier screen height is divided by this number to determine the modifier group height).'

Menu Item Editor

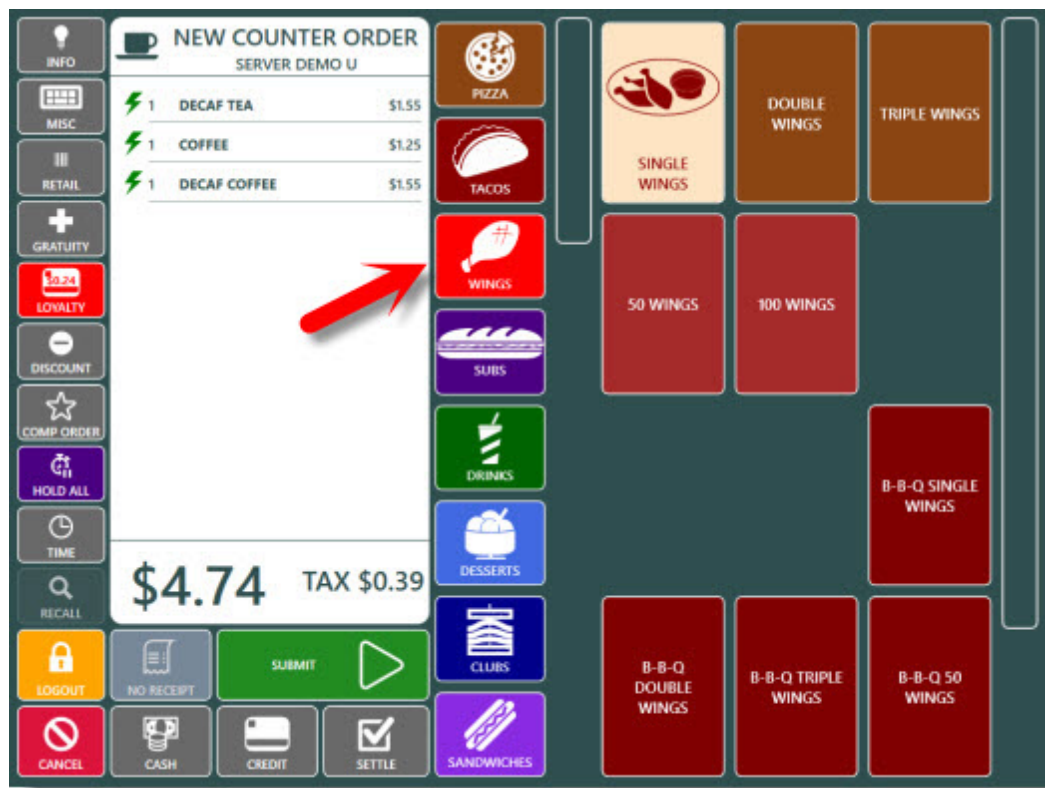
An empty space with the width equal to the width of a modifier button can be inserted between modifier buttons by adding a new modifier and setting the value of the **Visibility** setting to **Spacer**. This is useful for modifier groups that contain a large number of modifiers.



Modifier Group Spacer

## 22.2.4 Order Entry

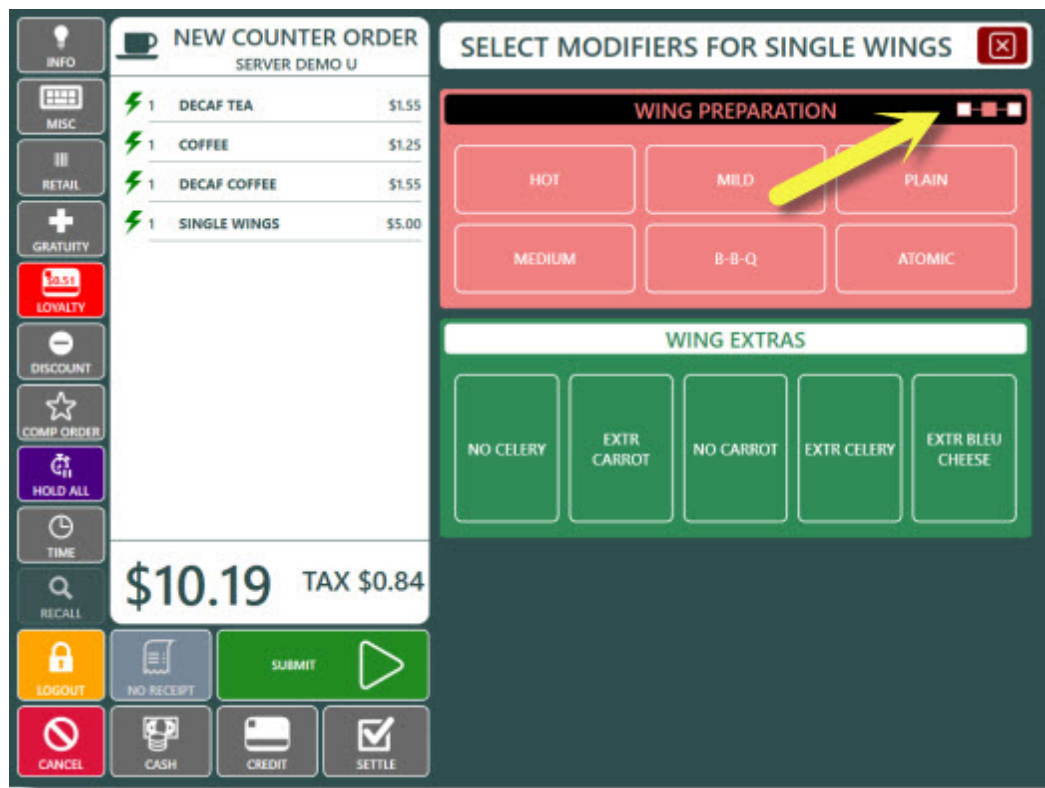
The regular menu includes any regular or retail item that should appear on the order entry screen or has a barcode that can be scanned or entered manually. AmigoPOS can support an unlimited number of menu categories. Each menu category can have an unlimited number of menu items and each menu item can have an unlimited number of modifier groups.



**Order Entry View Showing Regular Menu Items**

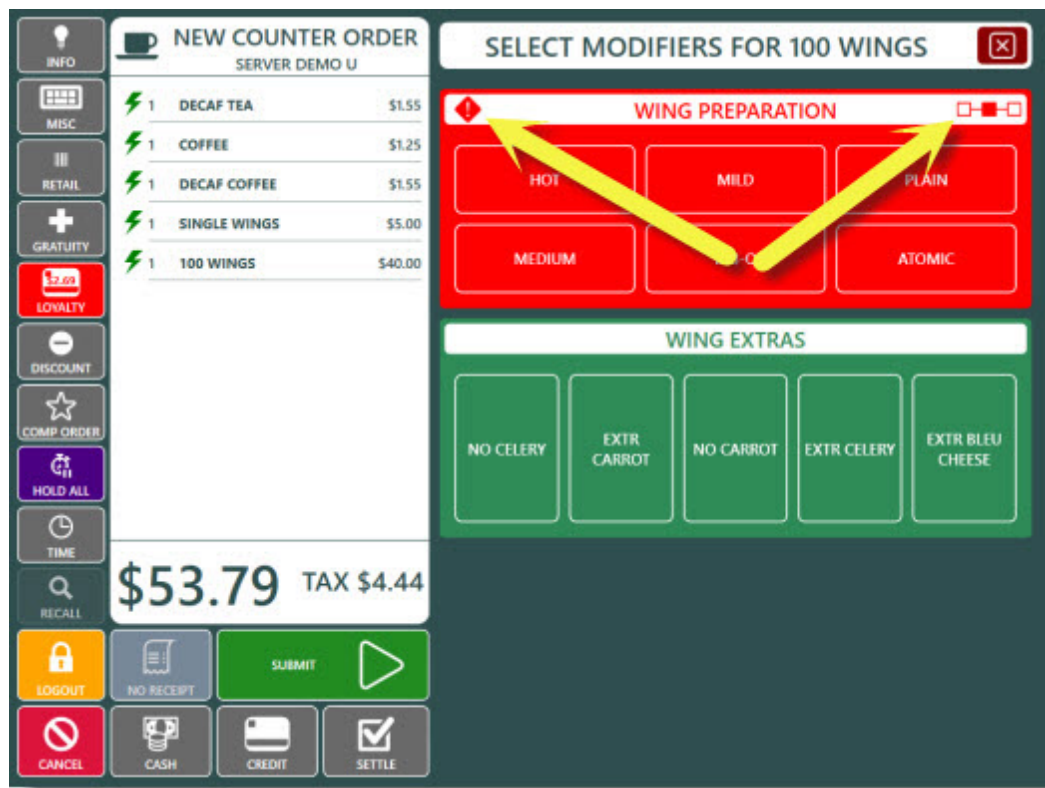
After selecting a menu category, the current menu items list is cleared and reloaded. In the example below, the **WINGS** category contains 10 visible menu items and 3 spacers (used to separate the regular wings from the BBQ wings).

In the example below, **Single Wings** was selected. Available modifier groups are shown. If no modifiers are required, press the **BACK TO MENU** button to continue the order, or the **SUBMIT** button to complete the order.



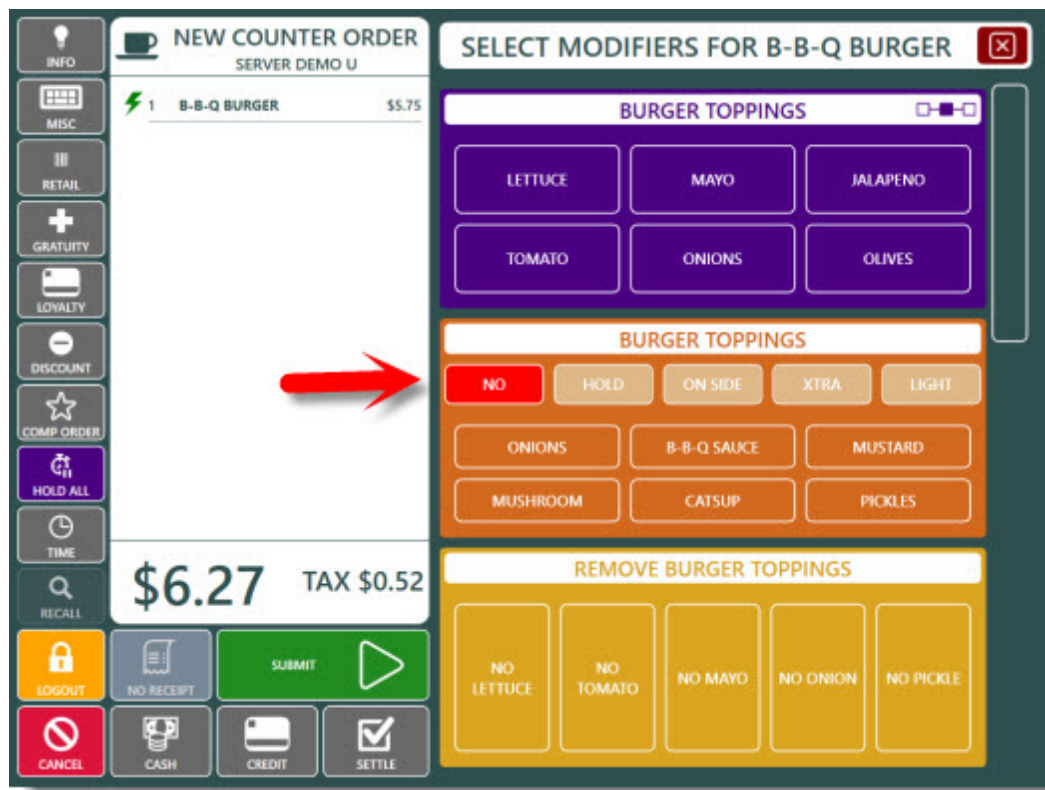
Order entry screen showing an exclusive modifier group

In the example below, **100 Wings** was selected. Note that the user cannot exit the modifier screen or complete the order until a modifier from the mandatory modifier group is selected.



Order entry screen showing a mandatory exclusive modifier group

In the example below, **BBQ BURGER** was selected. Note that the **BURGER TOPPINGS** modifier group contains modifier levels. If required, press the modifier level button before selecting the modifier. The modifier level button is shown with a red background when selected, as in the image below where the first modifier level **NO** in the **BURGER TOPPINGS** modifier group is selected. When the modifier item is selected, it will appear on the guest check with the **NO** prefix.



Order entry screen showing modifier levels

### 22.2.5 Pizza Menu

AmigoPOS can accommodate most pizza menus by adjusting the [modifier group settings](#)<sup>[840]</sup>. The scenarios below are used to illustrate the most common scenarios. Refer to the demo database for additional examples.

**Example 1: <Super Saver 2> 2 Large Any Style Pizzas w/ 1 topping included + 20 Wings + 2 Liter Soda \$47.50 Available Fridays Only**

The steps required are:

1. Create a new [menu item](#)<sup>[837]</sup> named Super Saver 2, set the price to \$47.50 and select the Pizza menu category.



**Menu Items**

Starts with

1 - LG PIZZA

1 - MED PIZZA

1 - SHEET PIE

1 - SM PIZZA

1 - XL PIZZA

**Main Settings** | Special Pricing | Modifier Assignments | Inve

**General Settings**

Item Name	LG PIZZA
Menu Category	PIZZA
Prep Text	LG PIZZA
Web Description	
Visibility	Visible
Button Position	1
Availability	In-Store & Web

**Appearance**

**Prep Printers**

Add New Menu Item

2. On the menu item editor, click the Modifier Assignments tab and click Add Group to add a new [modifier group](#) <sup>840</sup> named Pizza Styles 1. On the modifier group editor, set the value of Maximum Allowed setting to 1 so that one total style can be selected for each pizza. Set the Modifier Prefix setting to P1 to identify the pizza on the prep ticket and customer receipt

Starts with

Omelete Extras

Omelete Preparation

ONIONS

Pancake Options

Pizza Ingredients

Pizza Styles

**Pizza Styles 1**

Pizza Toppings

**Modifier Group Settings** | Modifiers | Current Menu Item Assignments

**General Settings**

Description	Pizza Styles 1
Background Color	55; 116; 148
Exclusive	<input type="checkbox"/>
Modifiers Included	0
Prefix	P1
Maximum Allowed	1
Prevent Duplicate Modifier Levels	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Inventory Markup	4

**Modifier Levels**

Modifier Level 1	None
Modifier Level 2	None

Add New Modifier Group

3. Create 2 new modifiers levels, TOP ½ and BOT ½. Set the Quantity Multiplier setting for each modifier level to 0.5 and assign both new modifier levels to the Pizza Styles modifier group.

General Settings	
Button Text	TOP 1/2
Prep Text	TOP
Quantity Multiplier	0.5

Appearance	
Button Color	19
Text Color	255; 255; 255
Bold Text	<input checked="" type="checkbox"/>
Italic Text	<input type="checkbox"/>

Add New Modifier Levels

4. Assign both new modifier levels to the Pizza Styles modifier group.

General Settings	
Description	Pizza Styles 1
Background Color	55; 116; 148
Exclusive	<input type="checkbox"/>
Modifiers Included	0
Prefix	P1
Maximum Allowed	1
Prevent Duplicate Modifier Levels	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Inventory Markup	4

Modifier Levels	
Modifier Level 1	TOP 1/2
Modifier Level 2	BOT 1/2
Modifier Level 3	None

Assign Modifier Levels to Modifier Group

5. Create a new modifier for each pizza style. Most pizza styles are priced at zero. For premium pizza styles, enter the additional price and the price for each modifier level. For example, if a California Style pizza costs \$5 more than a regular pizza style, set the modifier price to \$5, the TOP 1/2 price to \$2.50 and the BOT 1/2 price to \$2.50.

General Settings	
Button Text	California
Button Position	1
Prep Text	California
Visibility	Visible

Appearance	
Pricing	
Regular Price	5
TOP 1/2 Price	2.5
BOT 1/2 Price	2.5

Inventory	
Inventory Setup	Inventory

Appearance

Add New Modifier Items

6. After all pizza styles have been entered in the Pizza Styles 1 modifier group, return to the menu item editor, select the Pizza Styles 1 modifier group and click copy. Change the name of the new group to Pizza Styles 2. On the modifier group editor, change the Modifier Prefix to P2.

Main Settings Special Pricing **Modifier Assignments**

New Group Clone Help

Group ADD ICE CREAM TO PIE 3 Update

**Pizza 1 Styles**

Position 2

Remove Copy Optional Move Up Move Down

Copy Modifier Group

7. Return to the menu item editor, click the Modifier Assignments tab and click New Group. Enter Pizza 1 Toppings and set the Modifiers Included setting to 1 so that the first ingredient is included at no additional cost. Set the Modifier Prefix setting to P1. Select TOP 1/2 for Modifier Level 1 and BOT 1/2 for Modifier Level 2.

Starts with

PIE ICE CREAM  
ADD-ONS  
  
PIE OPTIONS  
  
**Pizza 1 Toppings**  
  
PIZZA 2 TOPPINGS  
(1ST TOPPING FREE)  
  
PIZZA INGREDIENTS  
  
PIZZA STYLE  
  
PIZZA STYLE  
  
PIZZA STYLE  
  
PIZZA STYLE

**Modifier Group Settings**   Modifiers   Current Menu Item Assignments

General Settings	
Description	Pizza 1 Toppings
Background Color	55; 116; 148
Exclusive	<input type="checkbox"/>
Modifiers Included	1
Prefix	P1
Maximum Allowed	0
Prevent Duplicate Modifier Levels	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Inventory Markup	4

**Set Modifiers Included to 1**

Modifier Levels	
Modifier Level 1	TOP
Modifier Level 2	BOTTOM
Modifier Level 3	None
Modifier Level 4	None
Modifier Level 5	None

**Exclusive**  
Check the box to allow only one modifier to be selected from this group

### Add New Modifier Group

8. Click the Modifiers tab and click Add New to add a new modifier. Set the regular price, TOP ½ price and BOT ½ price. Repeat for the remaining pizza toppings.

Starts with

PIE ICE CREAM  
ADD-ONS  
  
PIE OPTIONS  
  
**Pizza 1 Toppings**  
  
PIZZA 2 TOPPINGS  
(1ST TOPPING FREE)  
  
PIZZA INGREDIENTS  
  
PIZZA STYLE  
  
PIZZA STYLE  
  
PIZZA STYLE  
  
PIZZA STYLE

**Modifier Group Settings**   **Modifiers**   Current Menu Item Assignments

Add New   Delete Selected   Help

**1-BACON**  
  
1-JALAPENOS  
  
1-SAUSAGE  
  
1-PINEAPPLE  
  
1-MUSHROOMS  
  
1-GREEN PEPPER  
  
1-EXTRA CHEESE  
  
1-RED PEPPERS  
  
1-ANCHOVIES

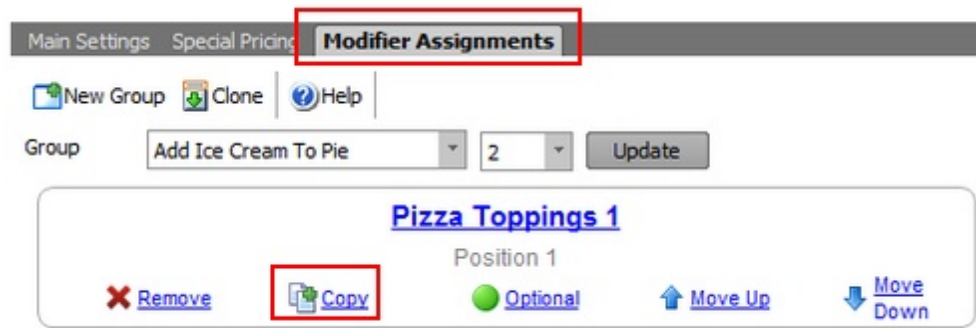
General Settings	
Button Text	BACON
Button Position	1
Prep Text	Bacon
Visibility	Visible

Appearance	
Button Color	19; 103; 132
Text Size	
Text Color	255; 255; 255
Bold Text	<input type="checkbox"/>
Italic Text	<input type="checkbox"/>

Pricing	
Regular Price	2
TOP Price	1
BOTTOM Price	1

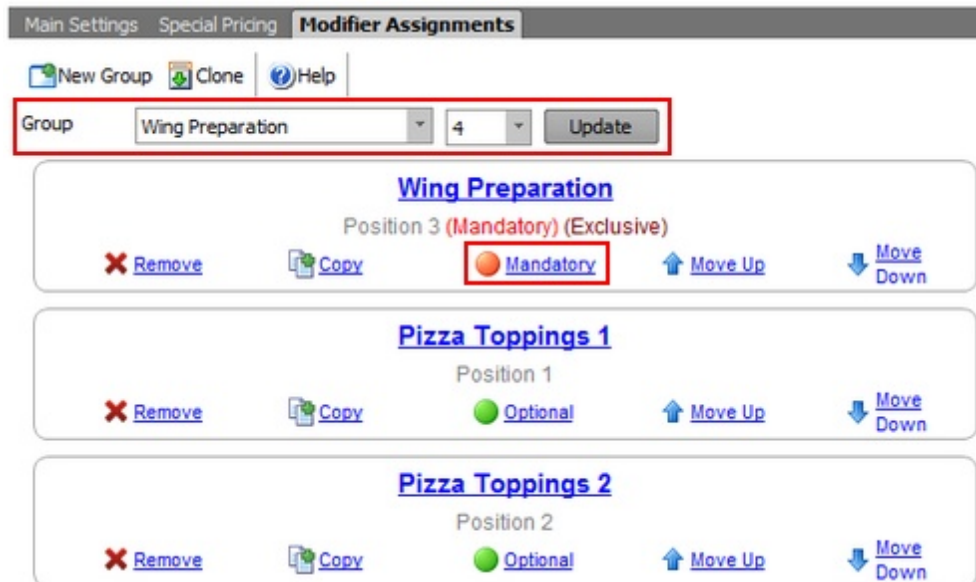
### Add New Modifiers

9. After all pizza toppings have been entered in the Pizza Toppings 1 modifier group, return to the menu item editor, select the Pizza Toppings 1 modifier group and click copy. Change the name of the new group to Pizza Toppings 2. On the modifier group editor, change the Modifier Prefix to P2.



Copy Modifier Group

10. Return to the menu item editor, click the Modifier Assignments tab and select the "Wing Preparation" modifier group from the drop-down list. Change Optional to Mandatory so that the group is required and appears in position 1. If a group named Wing Preparation does not appear on the list, create a new modifier group and add new modifiers, i.e. Hot, Medium, Mild.



Add Existing Modifier Group

11. Return to the menu item editor, click the Modifier Assignments tab and select the "Soda Flavor" modifier group from the drop-down list. Change Optional to Mandatory so that the group is required and appears in position 1. If a group named Soda Flavor does not appear on the list, create a new modifier group and add new modifiers, i.e. Coke, Mountain Dew, Hi-C.

Main Settings Special Pricing **Modifier Assignments**

New Group Clone Help

Group Add Ice Cream To Pie 3 Update

**Wing Preparation**  
Position 1 (Mandatory) (Exclusive)  
Remove Copy Mandatory Move Up Move Down

**Soda Flavor**  
Position 2 (Mandatory)  
Remove Copy **Mandatory** Move Up Move Down

**Pizza Toppings 1**  
Position 1  
Remove Copy Optional Move Up Move Down

Add Existing Modifier Group

12. On the menu item editor, click the Main Settings tab. Check the Restrict Days box under Day/Time Availability and check the box next to Friday.

\*\* All Regular Menu Items \*\*

Starts with s

0 - SHEET PIE

0 - SM PIZZA

0 - Spacer

1 - Single Wings

1 - SUPER SAVER 1

1 - SUPER SAVER 2

**Main Settings** Special Pricing Modifier Assignments

Time On 00:00

Time Off 00:00

**Restrict Days**

Sunday

Monday

Tuesday

Wednesday

Thursday

**Friday**

Saturday

**Inventory**

Inventory Setup

**General Settings**

Restrict Availability

## 22.3 Bar Menu

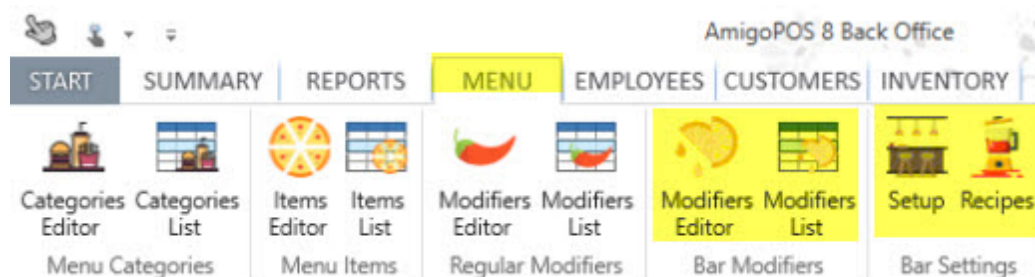
### 22.3.1 Menu Setup

The AmigoPOSbar menu is similar in structure to the regular menu with the exception that item modifiers are assigned to bar categories and that tax rates are assigned to an entire menu category. Similar to regular menu optional price levels, up to 6 bar menu upcharge levels are available for each bar category, with the price for each



upcharge defined per bar menu item, for a possible total of 7 price definitions per bar menu item (1 regular price + 6 upcharge prices).

Most users will find it useful to modify the existing bar menu included with AmigoPOS. The default menu includes most common bar menu categories and items with various combinations of upcharge levels, special pricing, button sizes, images, and other customizations that demonstrate most common features.



Back Office Bar Menu Setup

- [Bar Menu Categories](#)<sup>[864]</sup>
- [Bar Menu Items](#)<sup>[865]</sup>
- [Bar Modifiers](#)<sup>[865]</sup>
- [Bar Prep Items](#)<sup>[865]</sup>
- [Special Price Definitions](#)<sup>[870]</sup>
- [Preferences](#)<sup>[872]</sup>

### Bar Menu Categories

Bar menu categories are defined in the regular menu categories grid, as described in the [menu categories](#)<sup>[828]</sup> help topic.

In addition to the fields described in the [Regular Menu Categories](#)<sup>[828]</sup> topic, each bar category definition contains the following fields. Note that the tax rate and upcharge fields appear only for menu categories set to the **Bar Menu** menu type.

- **Bar Menu Tax Rate:** The tax rate id used to calculate taxes for every item assigned to this category. This value is only used for the bar menu (the regular menu tax rate is set for each item individually)
- **Always Show Bar Modifiers:** Set to Yes to hide the bar modifiers row and prep item row by default so that menu item buttons are larger (the modifier screen can still be accessed by selecting the order item).
- **Upcharge (1-6) Enabled:** When set to true, the upcharge button will appear when this category is chosen. Each bar menu item in this category must have a price defined for each enabled upcharge level
- **Upcharge (1-6) Description:** A brief description of the upcharge to appear on the button, prep text and customer receipt
- **Upcharge (1-6) Prefix:** The text to print before the menu item name when the upcharge is selected (i.e. **DBL** Vodka Tonic)
- **Upcharge (1-6) Suffix:** The text to print after the menu item name when the upcharge is selected (i.e. **Scotch** UP)

**MENU CATEGORIES**

1 2 **Bar Menu** Main Settings Menu Item Assignments Button

Add new category X +

18 DRAFT BEER

19 COFFEE

20 BOTTLE BEER A-K

21 BOTTLE BEER L-Z

22 TOP 10

23 WINE

24 SHOTS

25 MARTINIS

26 MIXED DRINKS

27 TOP SHELF

28 WELL

**General Settings**

Category Name WINE

Button Position 23

**Menu Type** Bar Menu

Web Description

Visibility Visible

Hide Button At This Station ☐

Availability In-Store & Web

**Always Show Bar Modifiers** ☒

Visible Columns 3

Visible Rows 4

Minimum Age Verification Not Required

**Pricing**

Inventory Markup 4

**Bar Menu Tax Rate** 9% [ID:1/Sales Tax]

Exclude From Special Pricing ☐

Exclude From Event Pricing ☐

Takeout Non-Taxable ☐

**Day/Time Availability**

**Bar Menu Upcharges**

Upcharge 1 Enabled ☒

Upcharge 1 Description GLASS

Upcharge 1 Prefix GLS

Upcharge 1 Suffix na

Upcharge 1 Inventory Adjustmer 1

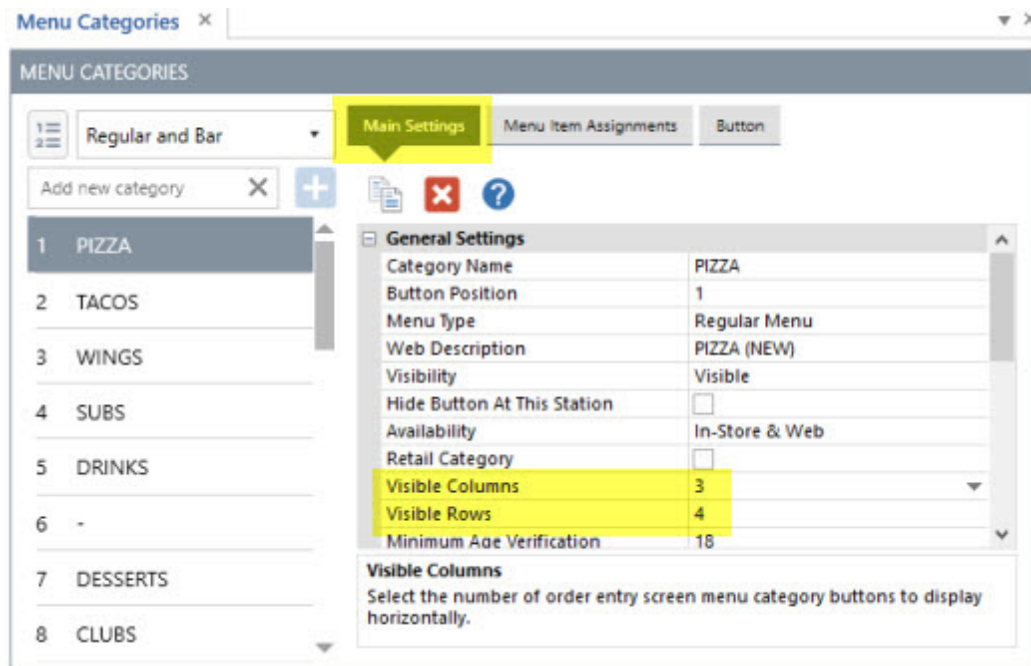
**Menu Type**

Specify whether this category is for regular or bar menu items

Menu Categories Editor

In **Back Office>Menu>Menu Categories**, select the menu category and set the columns to 3 and rows to 4 to show 12 bar menu items at one time. This setting applies to both regular and bar menu buttons.





Button Count Settings



12 Visible Menu Item Buttons

Bar Menu Items

An unlimited number of menu items are available for each bar category. Up to 7 prices are available for each item if upcharge levels are enabled for the bar menu category. Each menu item's button appearance can be fully customized. In addition, points can be assigned to the item for use by the loyalty card program.

The screenshot displays the 'MENU ITEMS' management interface. On the left, a list of items under the 'MARTINIS' category is shown, including 'STRAWBERRY MARTINI (1)', 'BLUEBERRY MARTINI (2)', 'APPLE MARTINI (3)', 'ORANGE MARTINI (3)', 'LEMON MARTINI (4)', and 'CHERRY MARTINI (6)'. The 'MAIN SETTINGS' tab is selected, showing a table of configuration options for the 'STRAWBERRY MARTINI' item. The table includes fields for Item Name, Menu Category, Add to Shortcuts, Prep Text, Visibility, Button Position, and Availability. Below the table, there is a section for 'Upcharges' with a text input field for the item name.

General Settings	
Item Name	STRAWBERRY MARTINI
Menu Category	MARTINIS
Add to Shortcuts	<input type="checkbox"/>
Prep Text	STRAWBERRY MARTINI
Visibility	Visible
Button Position	1
Availability	In-Store & Web

**Upcharges**

**Item Name**  
Enter the menu item name. Limit the length to 20 characters.

### Bar Menu Items

Each bar menu item definition contains the following fields:

- **Item Name:** The text that appears on the bar menu item button and the custom receipt
- **Prep Text:** The text to print on remote prep orders and that appears on remote displays
- **Visibility:** The button may be visible, hidden (disabled), or act as a spacer for less cluttered screens
- **Button Position:** The button's relative position in relation to other bar menu item buttons (hidden buttons are ignored)
- **Menu Category:** The bar menu item's category assignment
- **Price:** The bar menu item's price
- **Upcharge (1-6):** When the category has Upcharge 1-6 enabled, specify the price to use for each enabled upcharge
- **Prep (1-10):** Specifies which remote printers and displays to send this bar menu item
- **Label (1-5):** Specifies which label printers to send this bar menu item
- **Recipe Image:** Reserved for future use; select the recipe image to use on remote displays and the recipe detail screen. This image must already exist in the database. To use a new image, open the image management utility and import the image into the Bar images category
- **Bar Recipe:** Reserved for future use; select the recipe to use when viewing the recipe on remote displays. This recipe must already exist in the database. Use the bar recipe editor to add new or edit existing recipes.
- **Loyalty Point Value:** Specify the number of loyalty points awarded when this bar menu item is added to the order.
- **Loyalty Point Redemption:** Specify the number of loyalty points required for the customer to obtain this item using a loyalty card

### Bar Item Modifiers

An unlimited number of menu item modifiers are available for each bar category.

**BAR MODIFIERS EDITOR**

1 2 **Bar Menu Modifiers** Settings Appearance Inventory

Add New Modifier X +

Item name contains X

0 RED BULL

1 DRY

2 EX DRY

3 ULT DRY

4 DIRTY

5 EX VERM

7 CHILL

**General Settings**

Item Name	RED BULL
Prep Text	Red Bull
Price	2.5
Revenue Center	LIQUOR
Visibility	Visible
Button Position	

**Menu Categories**

Show For All Bar Categories	<input type="checkbox"/>
Bar Menu Category 1	WELL
Bar Menu Category 2	TOP SHELF
Bar Menu Category 3	TOP 10

Item Name

#### Bar Menu Modifiers

Each bar optional item definition contains the following fields:

- **Bar Modifier Name:** The text that appears on the modifier item button and the custom receipt. **Each item must have a name (do not leave blank)**
- **Prep Text:** The text to print on remote prep orders and that appears on remote displays
- **Visibility:** The button may be visible, hidden (disabled), or act as a spacer for less cluttered screens
- **Button Position:** The button's relative position in relation to other bar menu item buttons (hidden buttons are ignored)
- **Price:** The bar modifier item's price
- **All Categories:** Specify whether this optional item should be active for all bar menu categories
- **Category (1-5):** Specify the individual categories (up to 5) for which this modifier item should be active

### Bar Prep Instructions

Bar prep instructions are used to add a prefix to a modifier. For example, the modifier name may be **ICE**, and the optional prefix may be **NO** or **EXTRA**.

**BAR MODIFIERS EDITOR**

1 2 **Bar Prep Items** Settings Appearance

Add New Bar Prep X +

Item name contains X

1	NO
2	EZ
3	SPLSH
4	XTRA
5	ON SIDE
6	CHLL
7	LITE

**General Settings**

Item Name	NO
Prep Text	
Visibility	Visible
Button Position	1

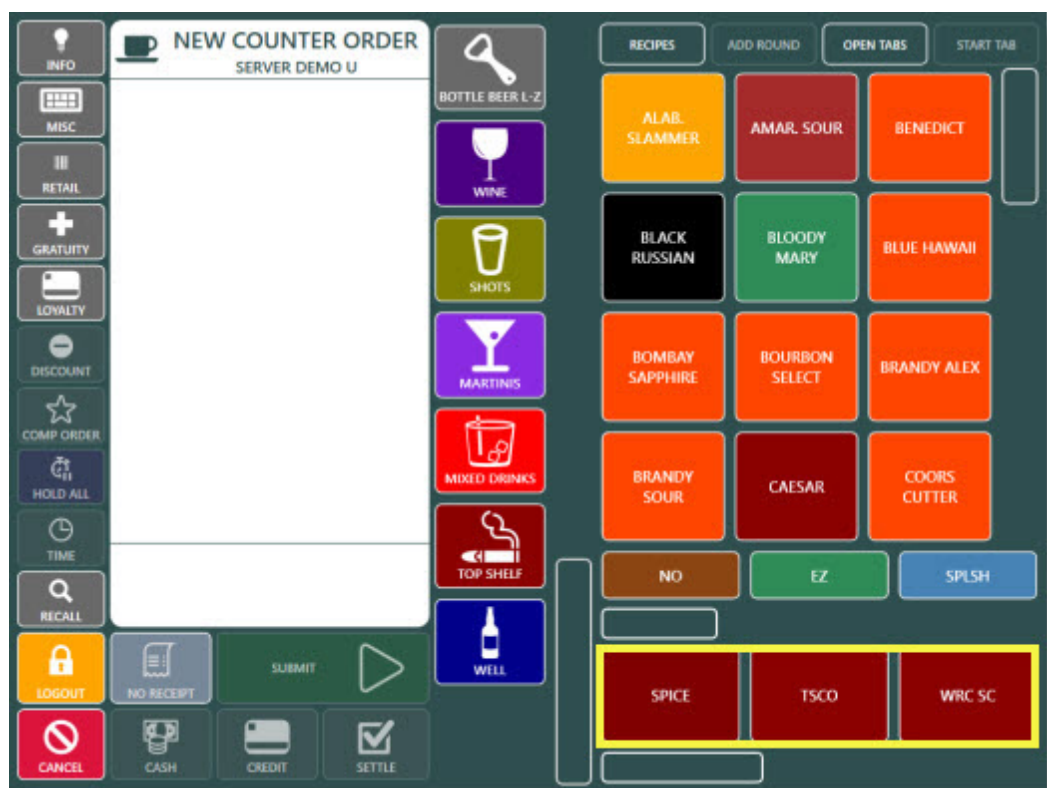
**Visibility**  
The menu item button's visibility on the order entry screen. The button can be visible, hidden, or act as a spacer to separate the the previous and next button.

### Bar Menu Prep Items

Each bar prep instruction definition contains the following fields:

- **Bar Prep Name:** The text that appears on the prep item button and the custom receipt. Each item must have a name (do not leave blank).
- **Prep Text:** The text to print on remote prep orders and that appears on remote displays
- **\*Visibility:** The button may be visible, hidden (disabled), or act as a spacer for less cluttered screens

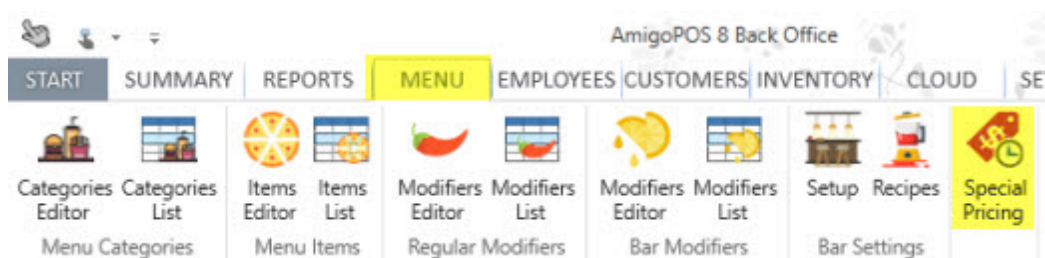
**\*Note:** If all bar menu prep items are set to **Hidden** or no bar prep items are defined, the bar modifier buttons will stretch to twice there normal width to fill the gap, as show below.



### Bar Menu Modifiers

#### Bar Item Special Pricing

Special pricing based on time and/or day can be applied to individual bar menu items or entire bar menu categories.



**SPECIAL PRICE DEFINITIONS**

**SPECIAL PRICING**

Bar Menu ▼

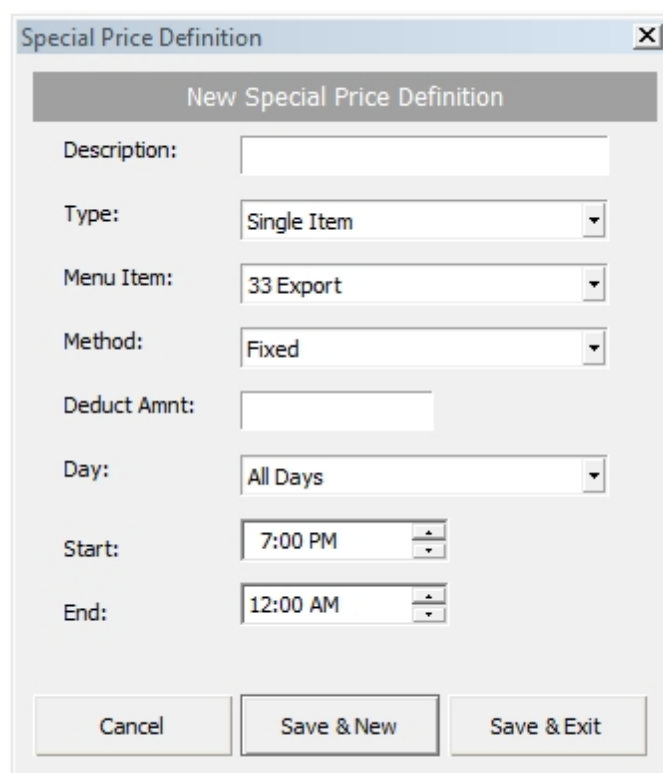
	SpecialName	Type	Category	Item	Day
+	Click here to add a new row				
>	\$1 Shots	Category	SHOTS		All

**Add a new bar menu specials - Enter a new bar special definition on the top line of the list**

Each bar special price definition contains the following fields:

- **Special Name:** A user friendly name to appear on the order entry screen specials list
- **Special Type:** Specify the scope or the special, i.e. bar item or bar category
- **Bar Category:** If it is a category special, select the category
- **Bar Menu Item:** If it is an individual item special, select the item from the list
- **\*Start Time:** The time that the special becomes active
- **End Time:** Time that the special becomes inactive. If the End Time is less than the Start Time, it is considered to be the next calendar day, allowing time ranges such as 11:00PM - 2:00AM
- **Day Of Week:** The special may apply to all days or any single day. If more than 1 day and less than 7 days are required, enter the identical special multiple times, selecting a different day each time.
- **Price Method:** Specify whether this is a fixed or percentage off discount.
- **Amount:** Enter the discount amount (use a decimal when percentage discounts are in use)
- **Apply Discount To Modifiers:** Specify whether to apply the discount to the bar item's modifiers (percentage discount only)
- **Show On List:** When the discount is active, show this discount on the order entry screen **Bar Specials** screen
- **Disable:** Set to True to temporarily disable this discount

To add a new special price definition, select Add New Special from the drop-down list to open the special editor dialog. To edit an existing special price definition using the dialog editor, double-click on the grid row header.



**Special Price Definition**

New Special Price Definition

Description:

Type:

Menu Item:

Method:

Deduct Amnt:

Day:

Start:

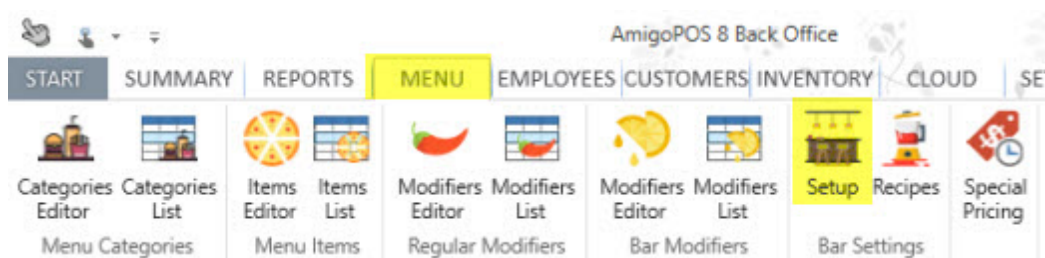
End:

Cancel Save & New Save & Exit

Bar Special Editor

### Bar Menu Settings

Many bar menu preferences are defined under the preferences tab. Other preferences are also available in **Back Office/Settings/ Main Settings/>User Interface**.



**BAR MENU SETTINGS**

**LOCAL SETTINGS (THIS STATION ONLY)**

**Pos Station Located at Bar** ☐  
Set to yes if this pos station is located at the bar so that prep tickets are not printed when bar orders are entered.

**Hide Cash Tender Button** ☐  
Set to Yes to disable bar menu (speed bar) cash tender button. Local setting: configure at each pos station.

**Hide Recall Button** ☐  
Set to Yes to disable bar menu (speed bar) recall. Local setting: configure at each pos station.

**Hide Add Round Button** ☐  
Set to Yes to disable bar menu (speed bar) add round button. Local setting: configure at each pos station.

**Hide Drink Recipes Button** ☐

Bar Menu Preferences

The bar menu preferences grid contains the following fields:

- **\*Pos Station Located at Bar:** Set to Yes to **disable printing** prep tickets for bar menu items entered at this pos station. Local setting: configure at each pos station
- **\*Hide Cash Tender Button:** Set to Yes to disable bar menu (speed bar) cash tender button. Local setting: configure at each pos station
- **\*Hide Recall Button:** Set to Yes to disable bar menu (speed bar) recall. Local setting: configure at each pos station
- **\*Hide Add Round Button:** Set to Yes to disable bar menu (speed bar) add round button. Local setting: configure at each pos station
- **\*Hide Drink Recipes Button:** Set to Yes to disable bar menu drink recipes button. Local setting: configure at each pos station
- **\*Hide Shortcuts Button: Set to Yes to disable bar menu shortcuts button.** Local setting: configure at each pos station
- **Bar Menu Modifier Markup:** Enter a numeric value to use when calculating the suggested price on the inventory screen for bar menu modifiers
- **Bar Menu Allow Tax Included:** Set to No to charge tax on bar menu items for order types that are configured to be tax inclusive
- **Bar Menu Enabled:** Enable the bar menu on the order entry screen
- **Order Bar Menu Items Alphabetically:** Set to No to use button position value to order bar menu items on the order entry screen
- **Order Bar Modifiers Alphabetically:** Set to No to use button position value to order bar modifier and prep item buttons on the order entry screen
- **Remote Print Bar Upcharge Asterisk:** Set to Yes to print an asterisk before and after the upcharge description when sent to prep printer

\*Settings with an asterisk apply to the local pos station only

### 22.3.2 OrderEntry

AmigoPOS includes an integrated bar menu with unlimited menu categories, items per category and modifiers. Up to six price levels per bar menu item are available in addition to the regular price, enabling the user to rapidly enter items that are sold in various sizes or containers. For example, Chablis may be sold by the glass with upcharges for 1/2 carafe, carafe or bottle.





**Order Entry Screen**

In the Top Shelf category shown below, each item is available as a regular (default price), double, triple, up, Shot, Tall and Short. Refer to the Bar Menu setup topic for information on assigning upcharge buttons to categories and setting a price for each upcharged menu item.

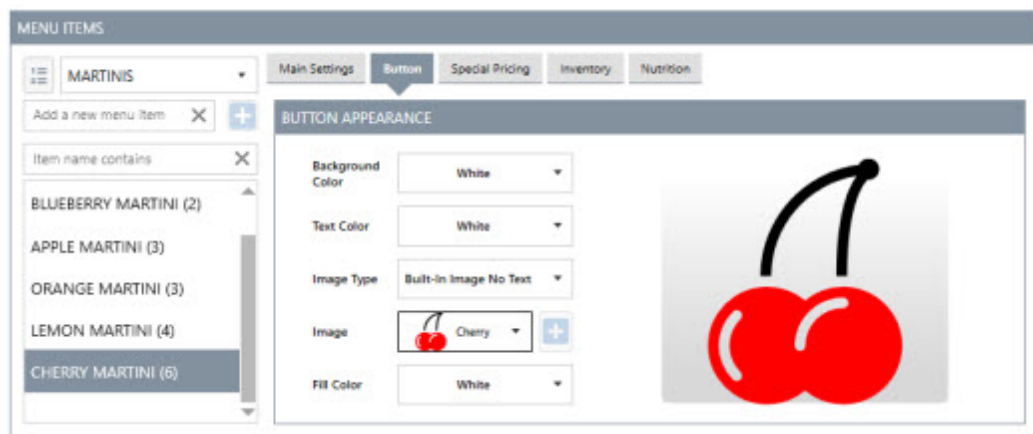


### Bar Menu Upcharges

Bar menu modifiers are similar to regular menu modifiers except that bar menu modifiers are assigned to a menu category and appear below the bar menu item screen, as shown below.

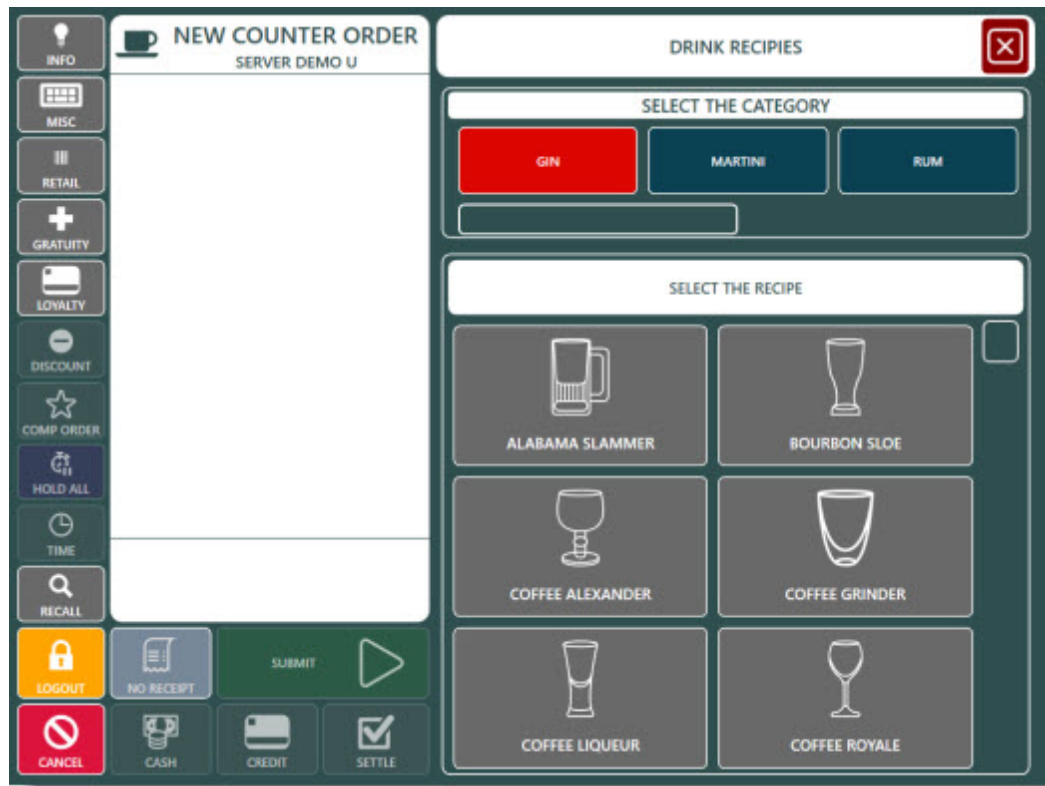


Bar Menu Modifiers



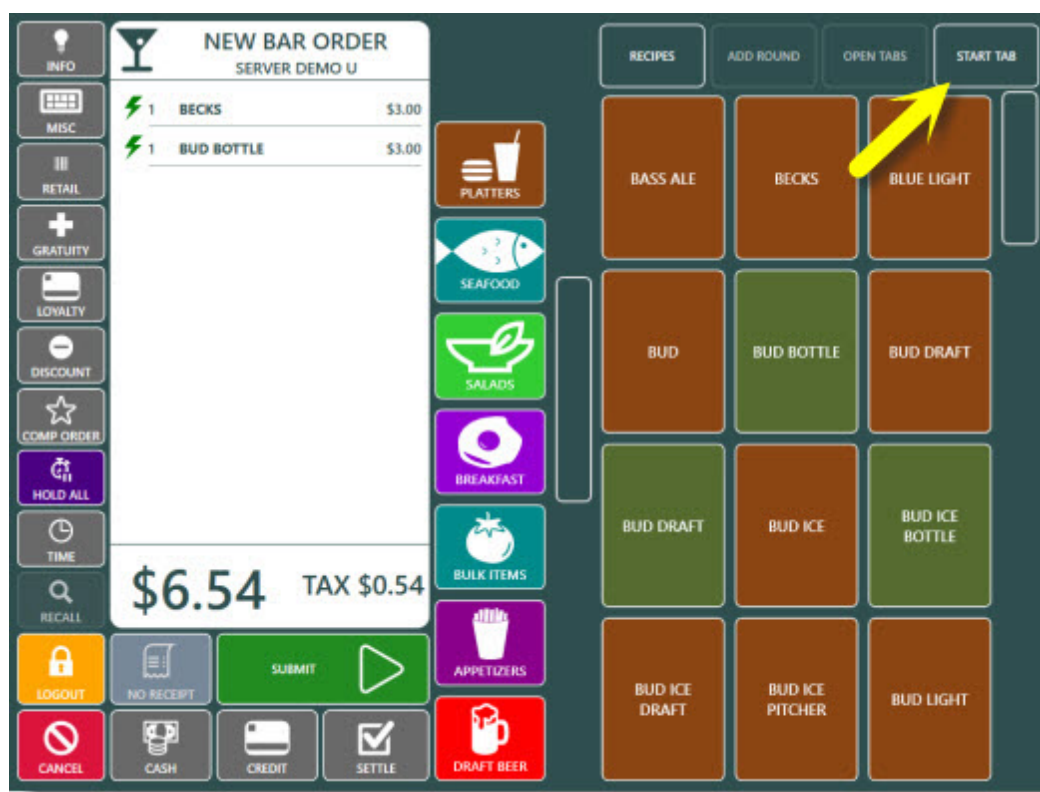
Bar Menu Item Appearance Settings

Bar menu item recipes and instructions can be stored in the database along with the corresponding glass, eliminating bartender confusion during busy hours.



**Bar Menu Item Recipes**

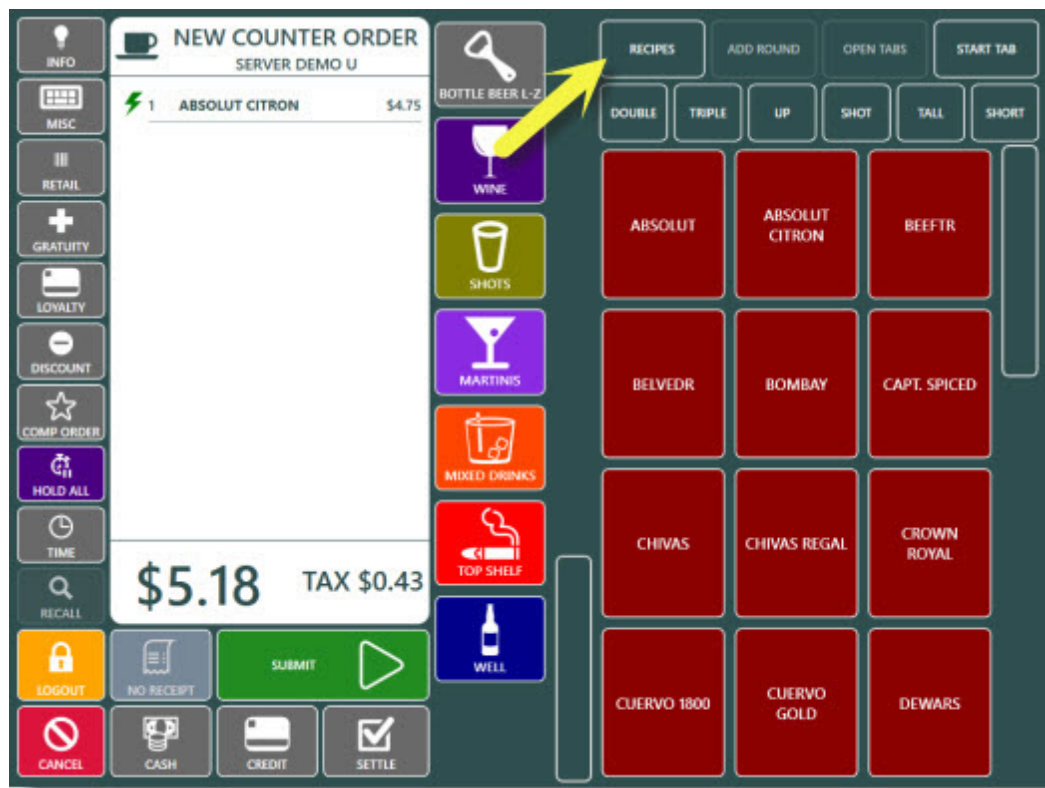
Bar tabs can be preauthorized with a credit card and can be prevented from exceeding the pre-authorization limit. See the [Bar Tabs](#) topic for additional information.



Bar Tabs

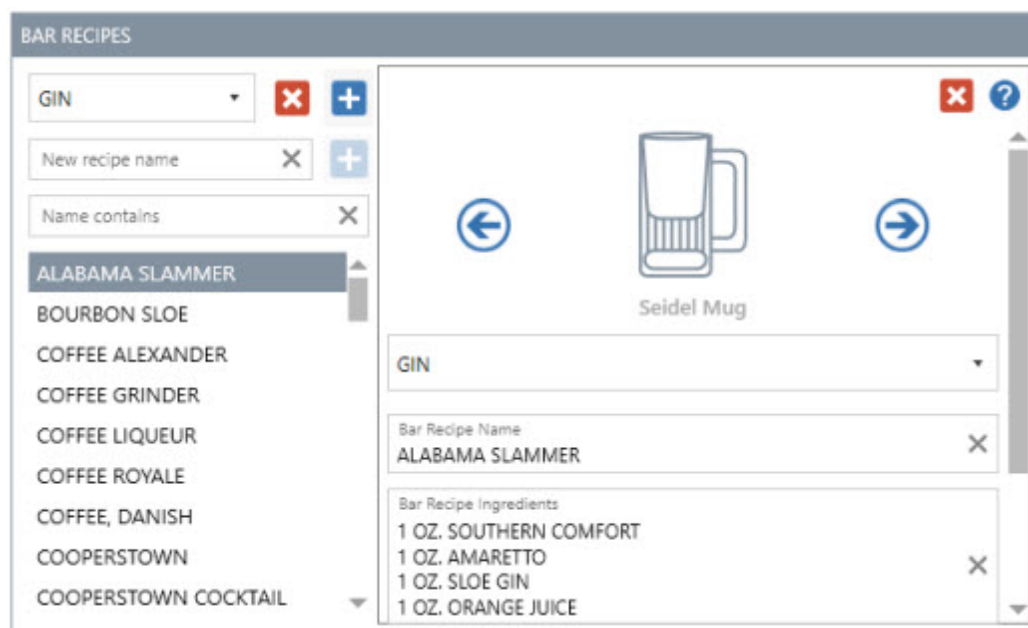
### 22.3.3 Bar Menu Recipes

Bar menu recipes are available on the order entry screen for server or bartender reference. Recipes can be added or edited in back office by clicking the **Bar Recipes** button under the **Bar Menu** shortcut button group.



### Bar Menu Recipes

Select a letter to filter the list by all drink recipes beginning with the selected letter, or press the top text box icon and press the letter buttons to narrow the list to a specific drink recipes. Press the top text box icon again to clear the text. The recipe editor is available in **Back Office>Menu>Bar Menu**. Each recipe can have a bar glass image assigned to encourage usage of correct glass by new employees.



Bar Menu Recipes Editor

## 22.4 Retail Items

### 22.4.1 Overview

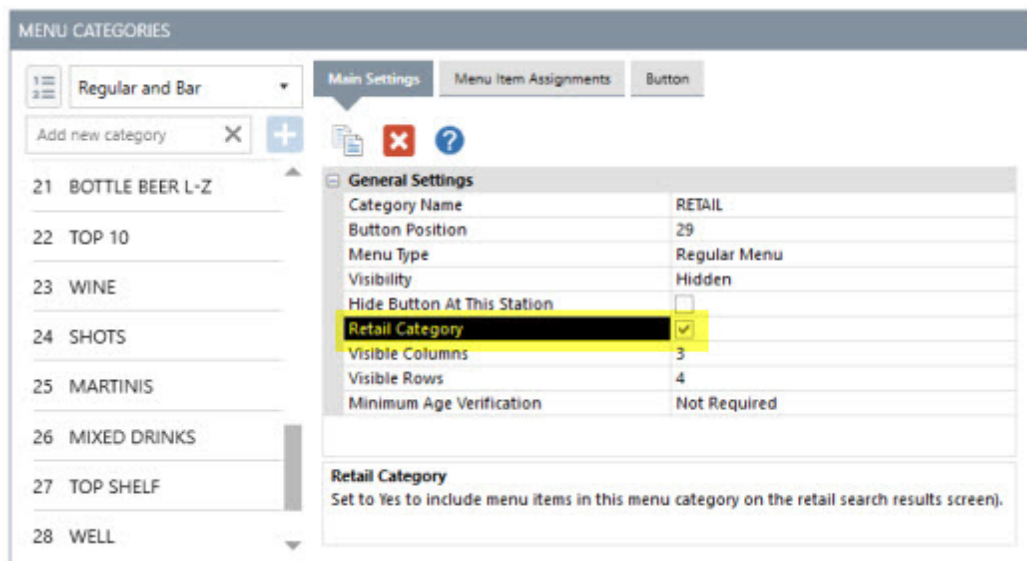
AmigoPOS includes the ability to manage multiple types of retail items, including

- **Random Weight:** random weight items contain a barcode with an embedded price, including deli items that are sold by weight. Barcodes are generated by a label printing scale when the product is weighed. Each barcode includes the item PLU and total price. Review the [Random Weight Barcodes](#)<sup>[886]</sup> help topic for additional details
- **PLU:** items such as self serve fountain drinks, donuts and other unmarked items can be added to the order by using a PLU. For items that do not contain a barcode or frequently sold items, the retail favorites list is used for quick access.
- **SKU:** barcoded items can be scanned onto the screen order by using a barcode scanner. Review the [Barcode Scanner](#)<sup>[113]</sup> help topic for additional details.
- **Bulk (Price By Weight):** bulk items that do not contain a random weight barcode may be weighed using a compatible counter scale and added to the order. Review the [Scale](#)<sup>[265]</sup> help topic for additional information.

#### Retail Order Type

Complete the following steps to automatically display the retail favorites when starting a new retail order:

1. Open the [menu category](#)<sup>[828]</sup> editor and select at least one menu category and check the box next to the **Retail Category** field. In the example below (included in the demo database), the RETAIL menu category and the **Visibility** is set to **Hidden**. Retail categories typically contain hundreds or thousands of items so that it is not convenient to locate individual items and a menu category button is not required.



**MENU CATEGORIES**

Regular and Bar

Add new category

21 BOTTLE BEER L-Z

22 TOP 10

23 WINE

24 SHOTS

25 MARTINIS

26 MIXED DRINKS

27 TOP SHELF

28 WELL

Main Settings | Menu Item Assignments | Button

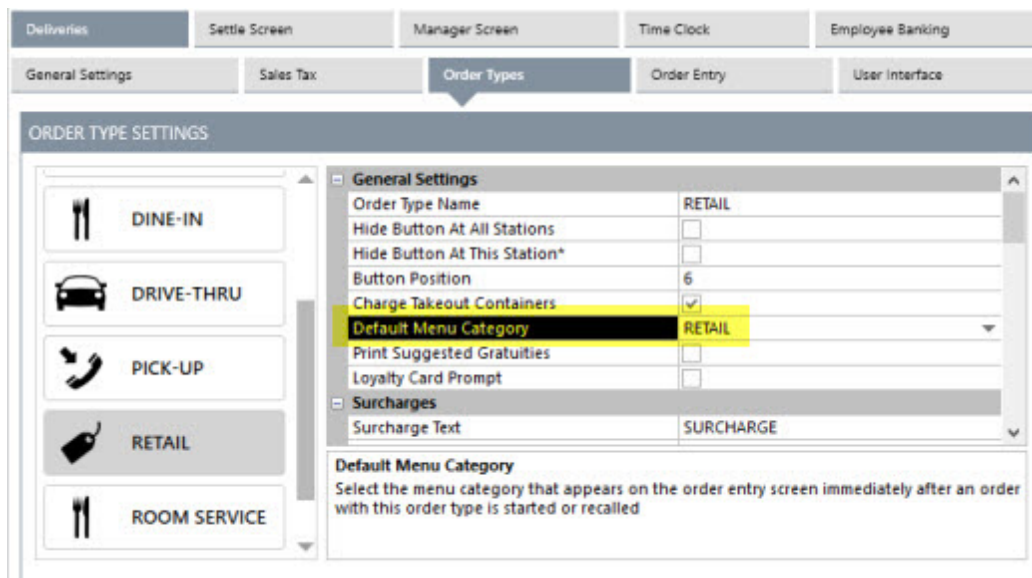
**General Settings**

Category Name	RETAIL
Button Position	29
Menu Type	Regular Menu
Visibility	Hidden
Hide Button At This Station	<input type="checkbox"/>
Retail Category	<input checked="" type="checkbox"/>
Visible Columns	3
Visible Rows	4
Minimum Age Verification	Not Required

**Retail Category**  
Set to Yes to include menu items in this menu category on the retail search results screen.

Menu Categories Editor

2. Open the [order type](#) editor and set the default menu category for the RETAIL order type to the retail menu category specified in the previous step. In addition, check the box next to Stay On Order Entry Screen so that a new retail order is started automatically each time a retail order is submitted.



Deliveries | Settle Screen | Manager Screen | Time Clock | Employee Banking

General Settings | Sales Tax | Order Types | Order Entry | User Interface

**ORDER TYPE SETTINGS**

DINE-IN

DRIVE-THRU

PICK-UP

RETAIL

ROOM SERVICE

**General Settings**

Order Type Name	RETAIL
Hide Button At All Stations	<input type="checkbox"/>
Hide Button At This Station*	<input type="checkbox"/>
Button Position	6
Charge Takeout Containers	<input checked="" type="checkbox"/>
Default Menu Category	RETAIL
Print Suggested Gratuities	<input type="checkbox"/>
Loyalty Card Prompt	<input type="checkbox"/>

**Surcharges**

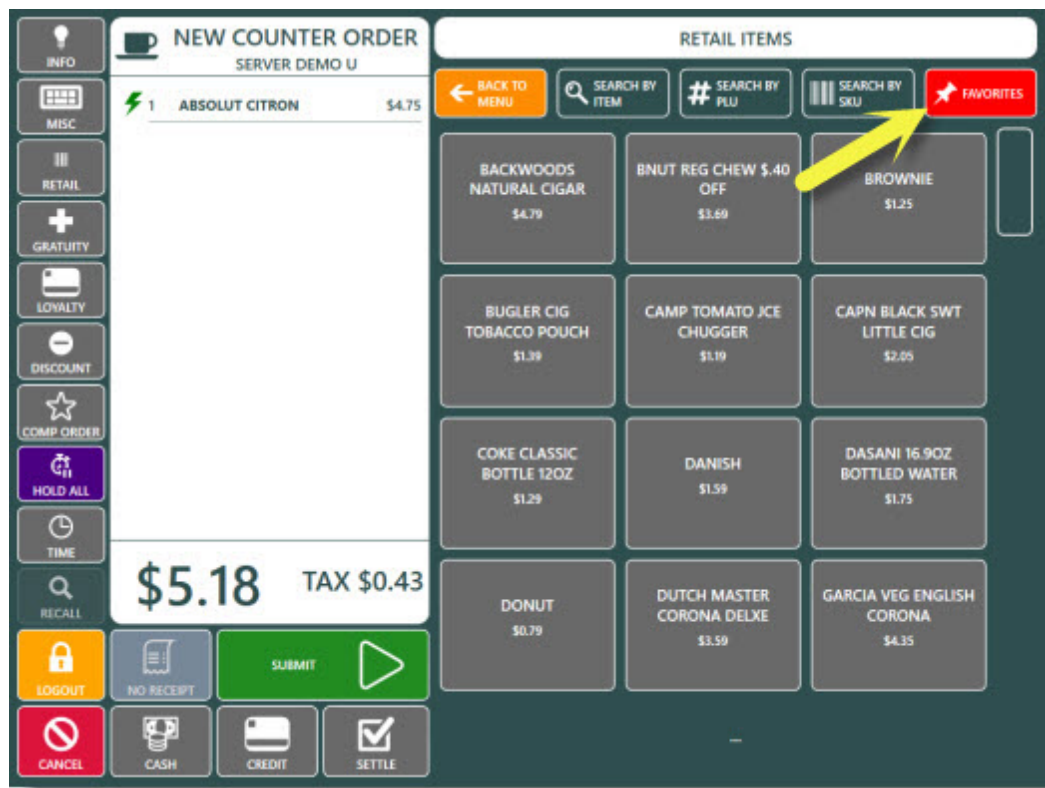
Surcharge Text	SURCHARGE
----------------	-----------

**Default Menu Category**  
Select the menu category that appears on the order entry screen immediately after an order with this order type is started or recalled

Order Types Editor

3. Synchronize the database and start a new retail order to verify that the retail favorites list is displayed when the order is started.

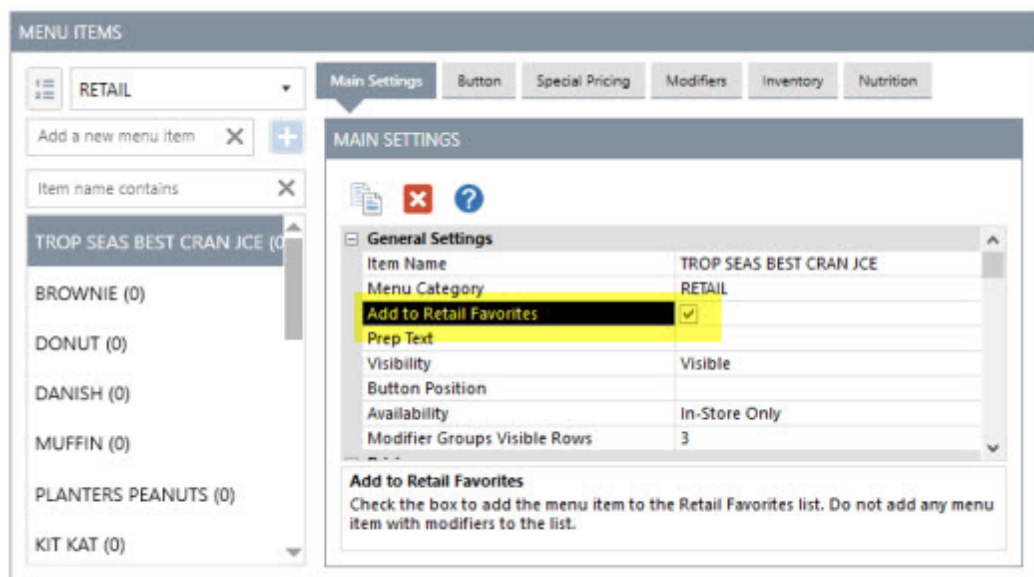




Order Entry Screen Retail Favorites

### Retail Favorites

Retail favorites are typically retail items that do not contain a barcode (i.e. pastries) and must be entered manually. Open the menu item editor, select the retail menu category and check the box next to **Add to Retail Favorites** to include the item on the favorites list. For best performance, the favorites list should not contain more than 100 items.



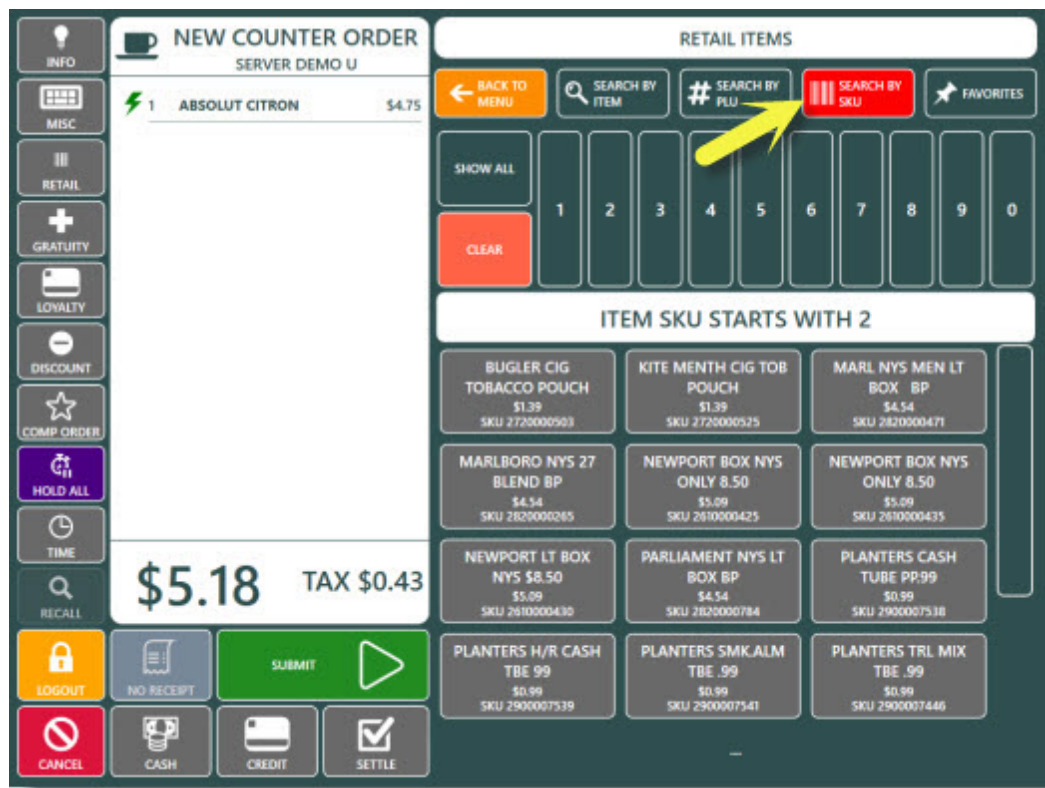
Retail Favorites Setup

Note that items can be quickly added to the retail favorites list by using the menu items grid instead of the individual menu items editor.

ID	ITEM NAME	SKU	RETAIL FAVORITE	WEB DE
+ Click here to add a new row				
▼ RETAIL - 18 Menu Items				
792	BROWNIE	79479320020	✓	The best l
680	CAMP TOMATO JCE CHUGGER	5100013797	✓	The best c
830	COKE CLASSIC BOTTLE 12OZ	04979407	✓	The best c
790	DANISH	79477320020	✓	The best c
831	DASANI BOTTLED WATER	031191708301	✓	The best c
701	DONUT	70479320020	✓	The best c

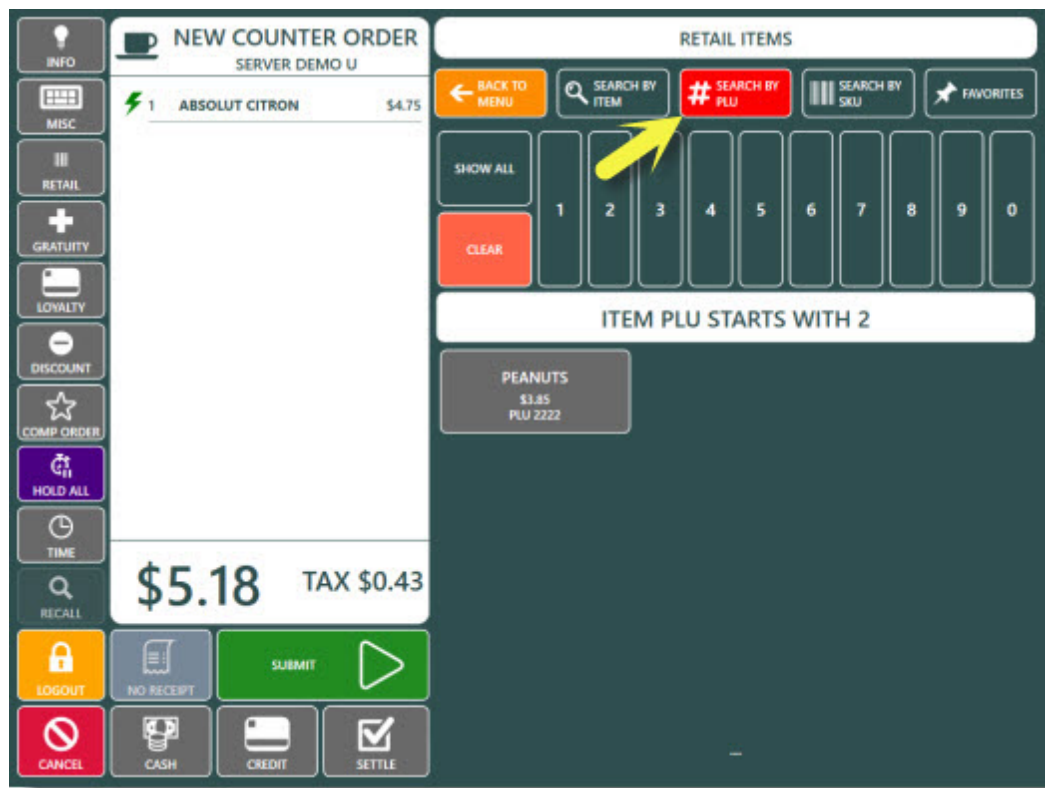
**Menu Items Grid**

To look up an item by barcode, press **SEARCH BY SKU** button at the top of the screen to activate the SKU number pad. Begin entering the SKU number until the correct item appears on the list.



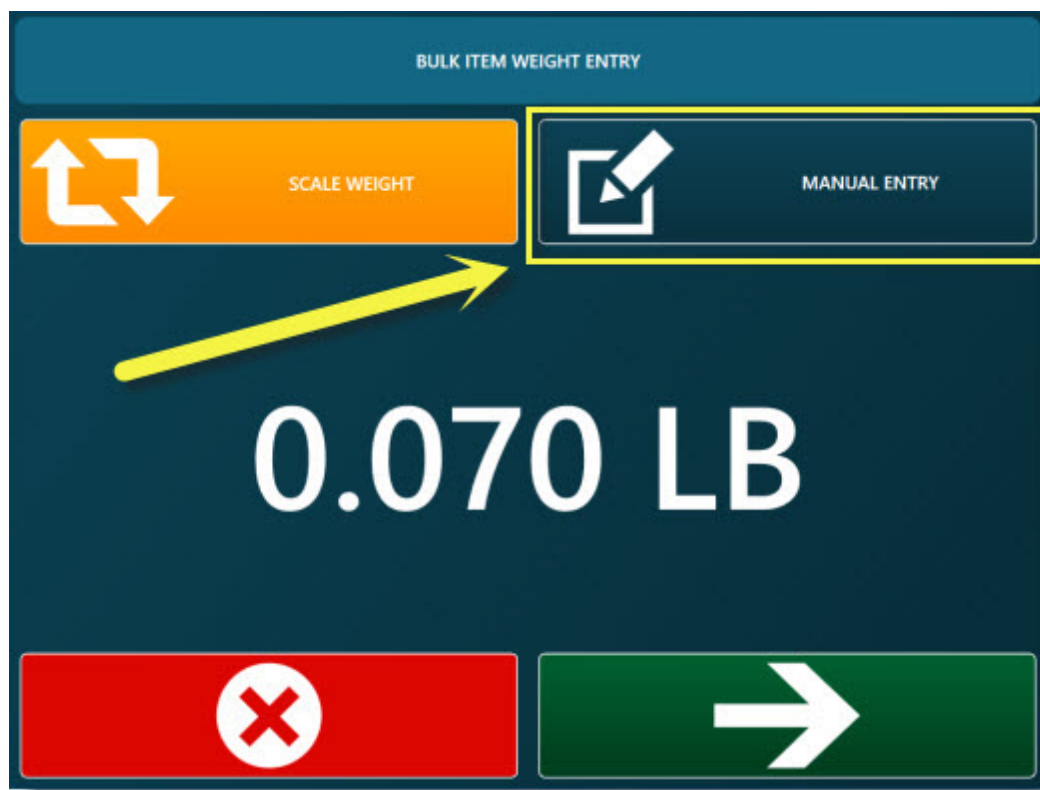
Retail Item Search By SKU

To look up an item by PLU, press **SEARCH BY PLU** button at the top of the screen to activate the **PLU** number pad. Begin entering the **PLU** number until the correct item appears on the list.



Retail Item Search By PLU

PLU items are typically bulk items that are sold by weight so that the item is not added to the order until the weight is specified. When a bulk item is selected, the user is prompted to place the item on the scale. If a scale is not connected to the pos station, the weight may be entered manually by selecting the **MANUAL ENTRY** to display the on-screen number pad.



Enter bulk item weight manually

## 22.4.2 Random Weight Barcodes

For AmigoPOS users that require random weight barcodes in a retail environment,

**Installation is divided into 3 easy steps:**

1. [Confirm Scale Barcode Settings](#) <sup>886</sup>
2. [Program Scale PLU list](#) <sup>887</sup>
3. [Enter PLU list in Back Office](#) <sup>887</sup>

### Confirm Scale Barcode Settings

Most scales are configured with a few of the most prevalent barcode formats in use. AmigoPOS supports random weight barcodes where the label barcode is printed in the following formats:

**Format 1:** D D I I I I I S P P P P C

**Format 2:** D D I I I I I S P P P P P C

**Format 3:** D D I I I I I I P P P P C

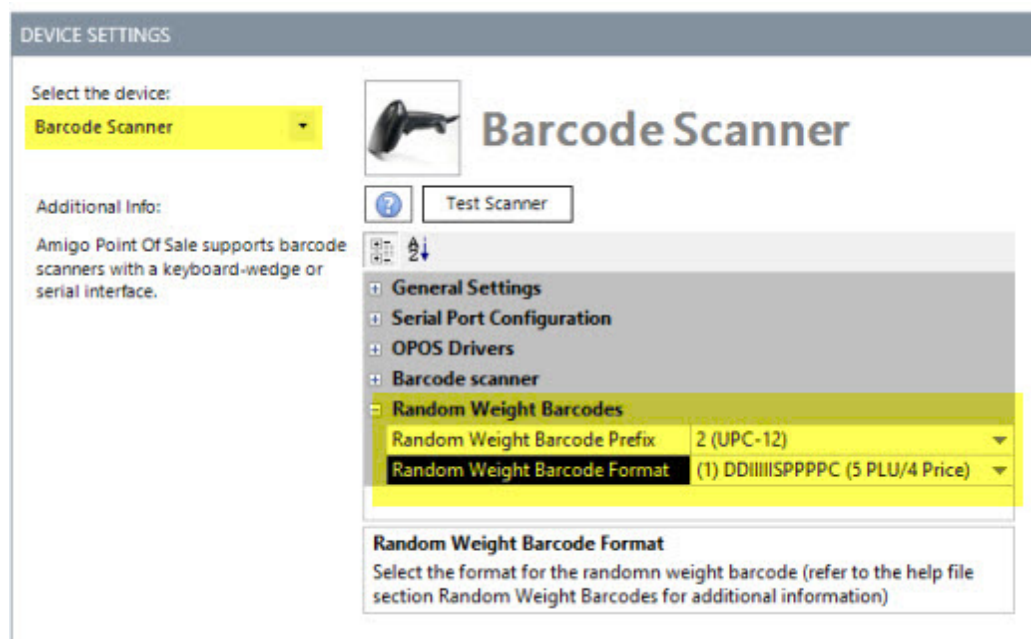
**Format 4:** D D I I I I I P P P P P C

**Format 5:** D D I I I I P P P P P P C

**Format 6:** D D I I I P P P P P P P C

D = department (always 02 for EAN or 2 for UPC)  
 I = PLU  
 S = Check sum for price  
 P = Price  
 C = Check sum for all numbers

Consult your scale's user manual for instructions on setting up the scale to print properly formatted barcodes.



**Back Office Random Weight Barcode Settings**

The settings to specify the random weight barcode format are located in **Back Office>Settings>Peripherals>Barcode Scanner>Random Weight Barcodes**. The settings are stored in the database and shared between all pos stations.

- **Random Weight Barcode Prefix:** Specify whether the barcode begins with **2** or **02**. If the value is 2, the barcode will always be 12 digits in length; if it is 02, the barcode length is always 13 digits.
- **Random Weight Barcode Format:** Select the barcode type as described above

### Program Scale PLU List

Program the PLU list into the scale according to the scale's user manual.

### Enter PLU list in Back Office

Add the items to the retail inventory grid in Back Office, using the PLU created in step two to populate the PLU column.

Method 1: Enter Item Manually  
 Method 2: Scan Barcode

### Enter Item Manually

Select **New Menu Item** Details under the **Regular Menu** button group in Back Office

1. Add the retail item to inventory of not already done.
2. Enter the item name.
3. Enter the numeric PLU. Note that this value is equivalent to the IIIII field, i.e. for IIIII=00301 on the barcode, enter 301 for the PLU
4. Select the item's tax rate
5. Click **Enter** to update the database

The screenshot shows the 'MENU ITEMS' editor in AmigoPOS 8. The 'BULK ITEMS' tab is selected. On the left, a list of items is shown: PEANUTS (1), LICORICE (2), COFFEE BEANS (3), HERSHEY KISS (4), and PISTACHIOS (5). The 'MAIN SETTINGS' tab is active, displaying a table of settings for the selected item 'PEANUTS'. The 'Pricing' section is expanded, showing the following values:

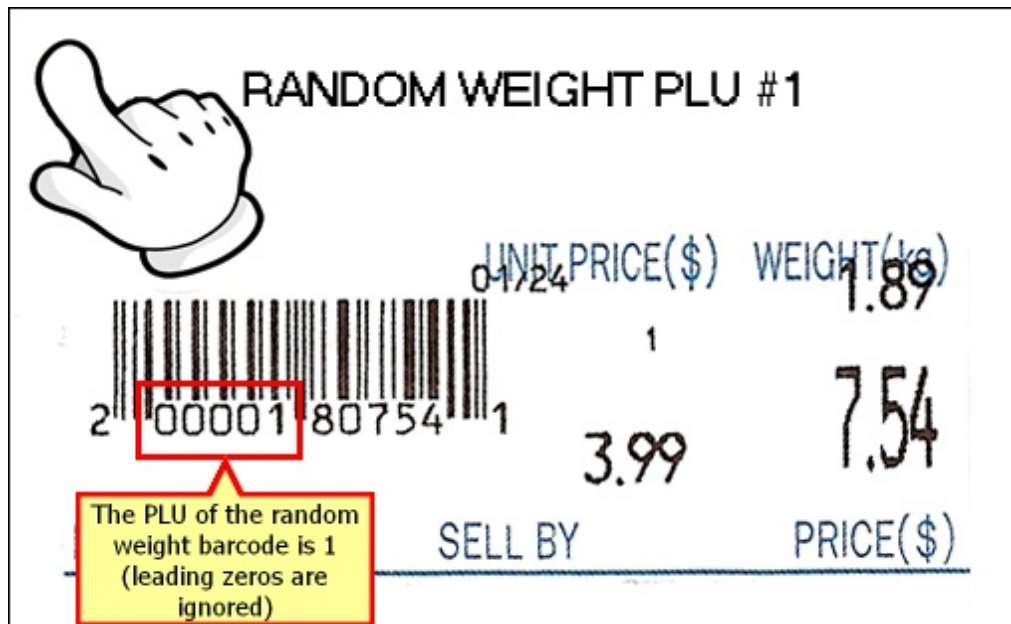
Price	3.85
Tax Rate	9% [ID:1/Sales Tax]
Revenue Center	FOOD
SKU	0
Retail Inventory	Add Inventory Item
PLU	2222
Sold By Weight	<input checked="" type="checkbox"/>
Price By Weight Multiplier	1/2
Price By Weight Suffix	1/2LB

Below the table, a note states: 'Price By Weight Multiplier: The price is divided by the fraction to arrive at the price per scale unit'.

Entering a PLU of 2222 in the menu item editor

#### Scan Barcode

1. Scan the barcode (you may print this page to scan the barcode example below, which corresponds to an item already entered in the demo database). If the item exists in the database, the item details will appear and the Update button will be enabled. If the item does not already exist, the Add button will be enabled.
2. Enter the numeric PLU. The PLU corresponds to the IIIII field above. In the image below, the PLU is 00001 and is entered in the database as 1.
3. Select the item's tax rate and category.
4. Click Add or Update to update the database
5. Open the order entry screen to test the item. In the example below, the item name will be displayed as RANDOM WEIGHT PLU #1 and the price is \$7.54, corresponding to the PPPP field above. Scanning the item multiple times will enter each item individually; quantities are not used for random weight barcode items.
6. If errors occur, ensure that the entire barcode scans correctly on the retail screen.



Random Weight Barcode Example (Format 1/UPC-12)

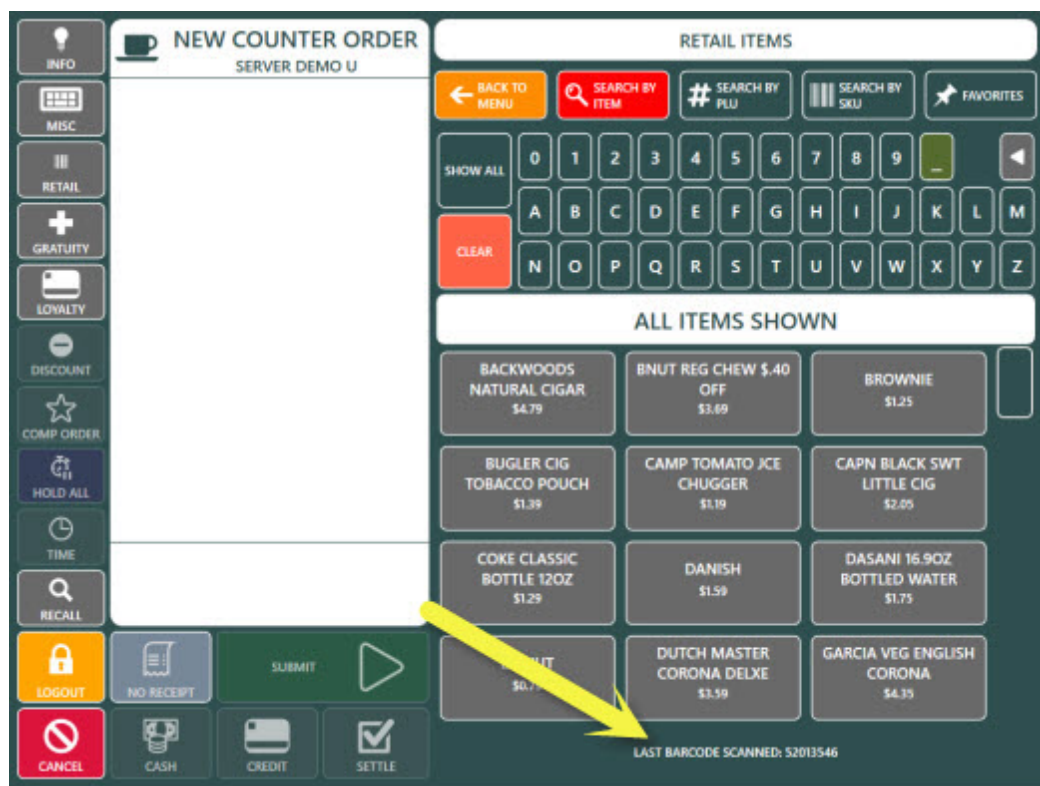
### Troubleshooting

If the printed barcode is properly formatted as described in the previous section, first verify that it scans correctly on the order entry screen by pressing the Retail button and scanning the barcode. The barcode appears in the bottom center of the screen, as shown below.

Note that the barcode shown below will be ignored because the leading zero is transmitted by the barcode scanner. **The leading digit of any random weight barcode must be 2 or 02.**

**0200001807541~** is not the same as **200001807541~**. If your scanner is transmitting the leading zero, select 02 as the random weight barcode prefix as shown above.





Scanning a barcode on the order entry screen. The barcode in this example will generate an error because of the leading zero.

### 22.4.3 Price By Weight

AmigoPOS includes the ability to sell items based on the item weight and cost per unit. The item can either be weighed on a counter scale or the weight can be entered manually using the on-screen keypad. In the image below, taken from the back office menu items grid set to detail view, the following fields are used to determine the final price:

- **Price:** The price to charge based on the counter scale unit of weight and the price by weight multiplier
- **Sold By Weight:** Check the box to show the scale prompt when the menu item is selected
- **PLU:** The unique numeric id used to lookup the item
- **Price By Weight:** Set to Yes to specify that the scale prompt will appear when this item is selected
- **Price By Weight Multiplier:** The value used to multiply the price to arrive at the final price per unit
- **Price By Weight Suffix:** The text to print after the price on the customer receipt and scale prompt

If the counter scale's unit of measure is the pound, the price is multiplied by the Price By Weight Multiplier to determine the actual price per unit, so that the peanuts shown below cost \$7.70 per pound, but are displayed on the customer receipt as \$3.85/½LB. If all items are priced per the scale's unit of measure, the Price By Weight Multiplier can be set to 1 (default value).

1

2

BULK ITEMS

▼

Add a new menu item

✕

+

Item name contains

✕

PEANUTS (1)

LICORICE (2)

COFFEE BEANS (3)

HERSHEY KISS (4)

PISTACHIOS (5)

Main Settings

Button

Special Pricing

Modifiers

Inventory

Nutrition

MAIN SETTINGS

📄

✕

?

General Settings

Pricing

Price	3.85
Tax Rate	9% [ID:1/Sales Tax]
Revenue Center	FOOD
SKU	0
Retail Inventory	<div>Add Inventory Item</div>
PLU	2222
Sold By Weight	<input checked="" type="checkbox"/>
Price By Weight Multiplier	1/2
Price By Weight Suffix	1/LB

Price By Weight Multiplier

The price is divided by the fraction to arrive at the price per scale unit

A screenshot of a scale's digital display. At the top, a dark blue header bar contains the text "BULK ITEM WEIGHT ENTRY" in white. Below this, there are two main buttons: an orange button on the left labeled "SCALE WEIGHT" with a white icon of two arrows forming a square, and a dark blue button on the right labeled "MANUAL ENTRY" with a white icon of a square and a checkmark. A yellow arrow points from the "SCALE WEIGHT" button towards the center. The center of the screen displays the weight "0.070 LB" in large white digits. At the bottom, there are two buttons: a red button on the left with a white circle containing a red "X", and a green button on the right with a white right-pointing arrow.

BULK ITEM WEIGHT ENTRY

SCALE WEIGHT

MANUAL ENTRY

CANCEL WEIGHT ENTRY

1 2 3

4 5 6

7 8 9

0

Manual Weight Entry

#### 22.4.4 Stock Verification

When adding items to an order, users can be warned that a retail item is out of stock by enabling the **Verify Retail Inventory** setting in **Back Office>Settings>Main Settings>Order Entry>Retail**.

AmigoPOS 8 Back Office

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS INVENTORY CLOUD SETTINGS

Main Settings Credit Cards Gift Cards Hotel Interface Discounts Combos Event Pricing Translations Screen Size Email & SMS Settings Data Sync All Program Settings Devices Vector Images

General Settings

0 Orders Settled | \$0.00 Since Last End Of Day

Main Settings x

General Settings Sales Tax Order Types **Order Entry** User Interface Deliveries Settle Screen Manager Screen Time Clock Employee

Order Entry Screen **Retail** Removed Items Void Reasons Age Verification

RETAIL SETTINGS

Bottle Deposit Text	BTL DEPOSIT
Default Misc Item Name	MISC ITEM
Group Retail Items On Single Ticket Line	Yes
Inventory Suggested Price Markup	4
Use Default Misc Item Name	No
<b>Verify Retail Inventory</b>	<b>Yes</b>
Weight Scale Unit	LB

**Verify Retail Inventory**  
Set to Yes to warn the user that their is insufficient inventory in stock when adding a retail item to the order.

Set the menu category **Retail Category** setting so that each item in the category is checked for sufficient stock before the item is added to the order.

START SUMMARY REPORTS **MENU** EMPLOYEES CUSTOMERS INVENTORY CLOUD SETTINGS HELP

Categories Editor Categories List Items Editor Items List Modifiers Editor Modifiers List Modifiers Editor Modifiers List Setup Recipes Special Pricing

Menu Categories Menu Items Regular Modifiers Bar Modifiers Bar Settings

0 Orders Settled | \$0.00 Since Last End Of Day

Menu Categories x

MENU CATEGORIES

1= Regular and Bar

Add new category x +

25 MARTINIS

26 MIXED DRINKS

27 TOP SHELF

28 WELL

29 RETAIL

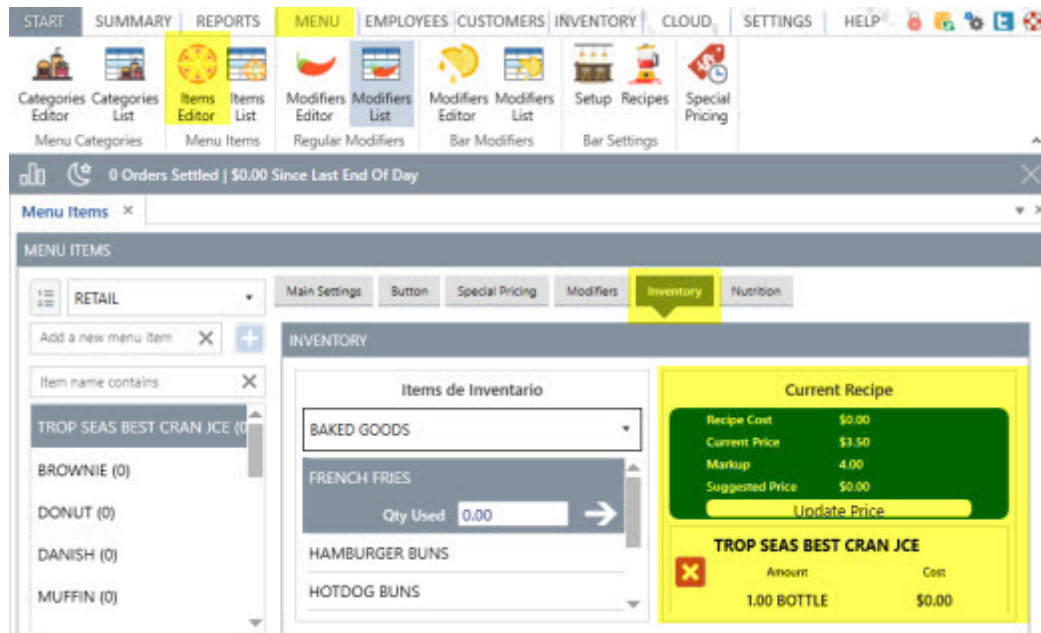
Main Settings Menu Item Assignments Button

General Settings

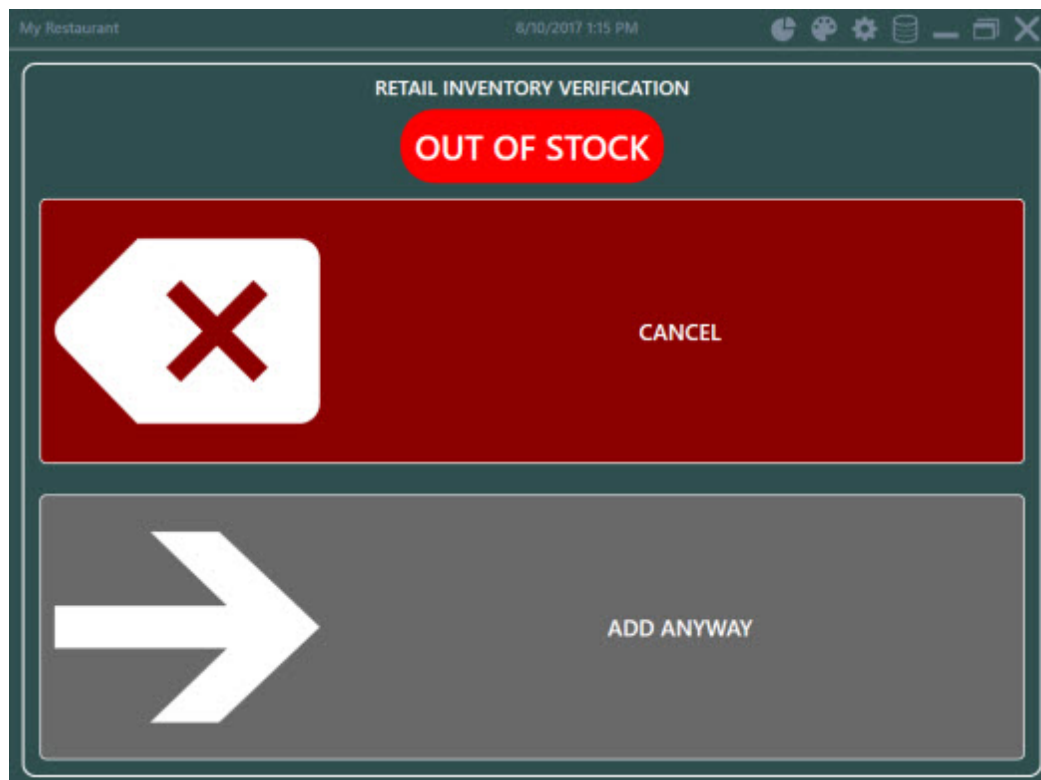
Category Name	RETAIL
Button Position	29
Menu Type	Regular Menu
Visibility	Hidden
Hide Button At This Station	<input type="checkbox"/>
<b>Retail Category</b>	<input checked="" type="checkbox"/>

**Retail Category**  
Set to Yes to include menu items in this menu category on the retail search results screen.

Note that the menu item must have an inventory recipe defined in order to check for sufficient stock. Retail inventory verification is bypassed for menu items with no inventory recipe.



When adding an item to an order, the following screen will appear if there is insufficient stock, giving the user the option to choose whether or not to continue.



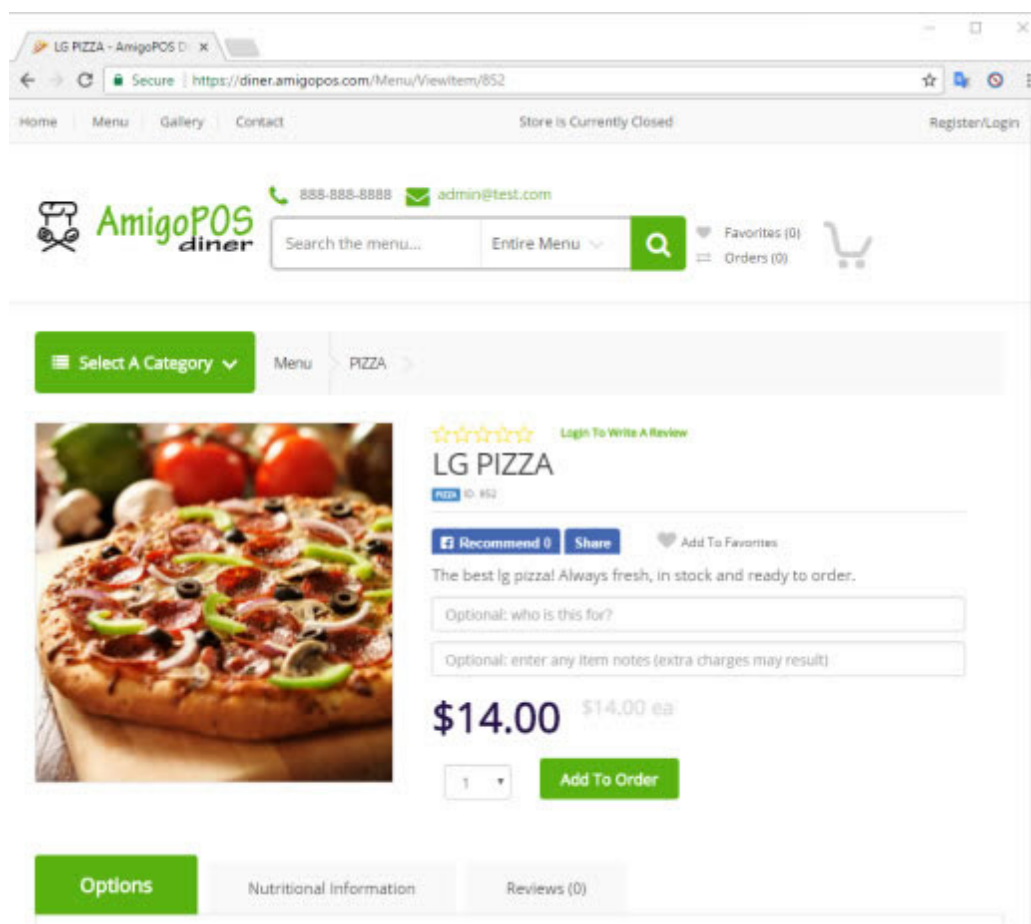
Part 23

# Online Ordering

## 23 Online Ordering

### 23.1 Overview

The AmigoPOS online ordering service is a subscription based e-commerce solution based on ASP.Net Core, Web API and Bootstrap 4 that is fully integrated with AmigoPOS. Orders are received automatically at the pos station and both the customer receipt and prep ticket are printed with no user action required. Customer notifications can be sent via email or SMS directly from the pos and the order status is available after the customer logs in.



#### Site Layout

The site layout and theme is managed by AmigoPOS staff and all menu updates are performed with a single click in back office. The site color, logo, images and text can be updated directly from the web browser by users with little or no knowledge of html or javascript.

#### Bootstrap

The AmigoPOS online ordering service relies on Bootstrap to ensure that the web site is compatible with most browsers and devices. Bootstrap is the most popular HTML, CSS, and JS framework for developing responsive, mobile first projects on the web. Users with knowledge of bootstrap can create highly customized web pages with advanced features such as popups

#### Web Server

Sites are hosted on Microsoft Azure cloud server in North America and Europe. Each site runs in a separate application pool so that high volume users do not impact the performance of other sites. The Microsoft SQL Azure Database engine is used to serve data and stores all images, text, menu and site settings. Twice daily backups are performed. At least 2 instances of each web server are running at any given time for maximum availability.

#### Domain Name

Each site is assigned a default subdomain under the amigopos.com domain. In addition, a new or existing domain name can be used by assigning the AmigoPOS online ordering service nameservers in the domain name registrar's control panel. Please contact AmigoPOS support for instructions to assign nameserver's for your specific registrar.

**Email**

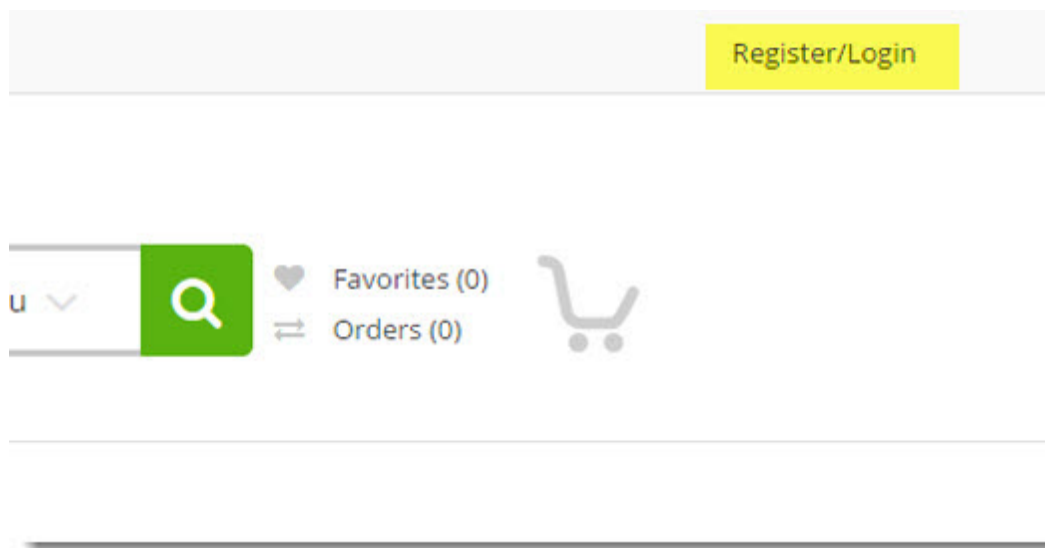
Order confirmation, order update and other notification emails are sent using Microsoft Azure email services and do not require a separate email account.

## 23.2 Initial Setup

Online ordering service and all other cloud services such as the gift & loyalty card service require Windows 7 SP1 or later with .Net 4.5+ (.Net 4.6.2 recommended). Run Windows Update to ensure that the most recent .Net framework updates are installed before configuring online ordering. Refer to the cloud service [system requirements](#)<sup>[315]</sup> topic for detailed instructions.

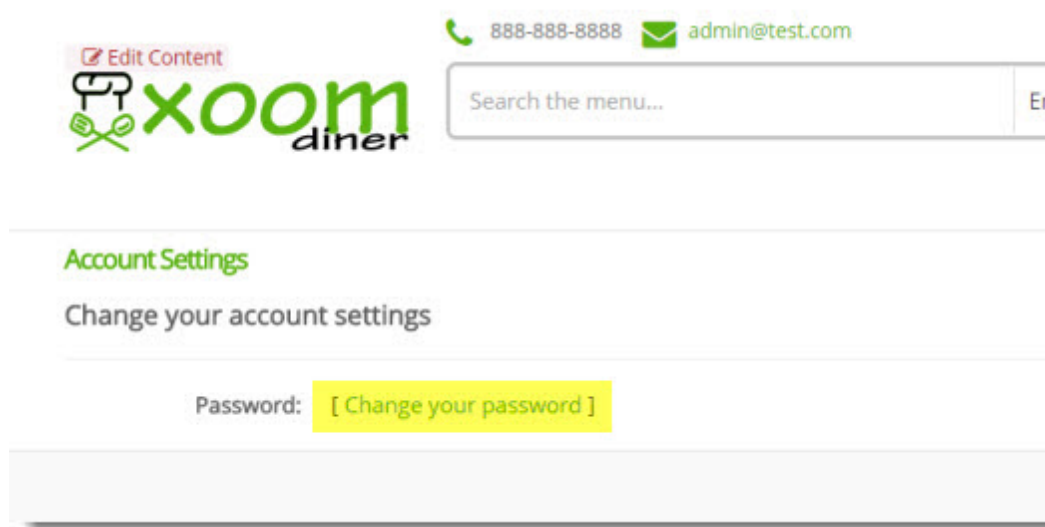
**Initial Login**

Obtain the store manager's user name and password from the subscription confirmation email and log in to your portal by clicking the Register/Login link at the top right.

**Change Password**

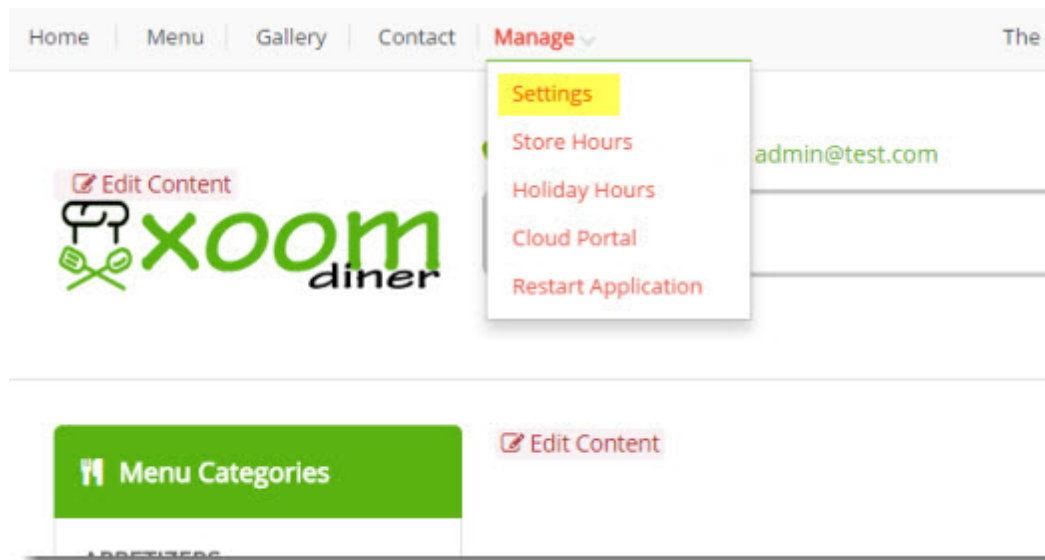
The password can be changed from the password assigned in the subscription confirmation email by clicking the user name at the top right to display the account settings page and then clicking the **Change your password** link.





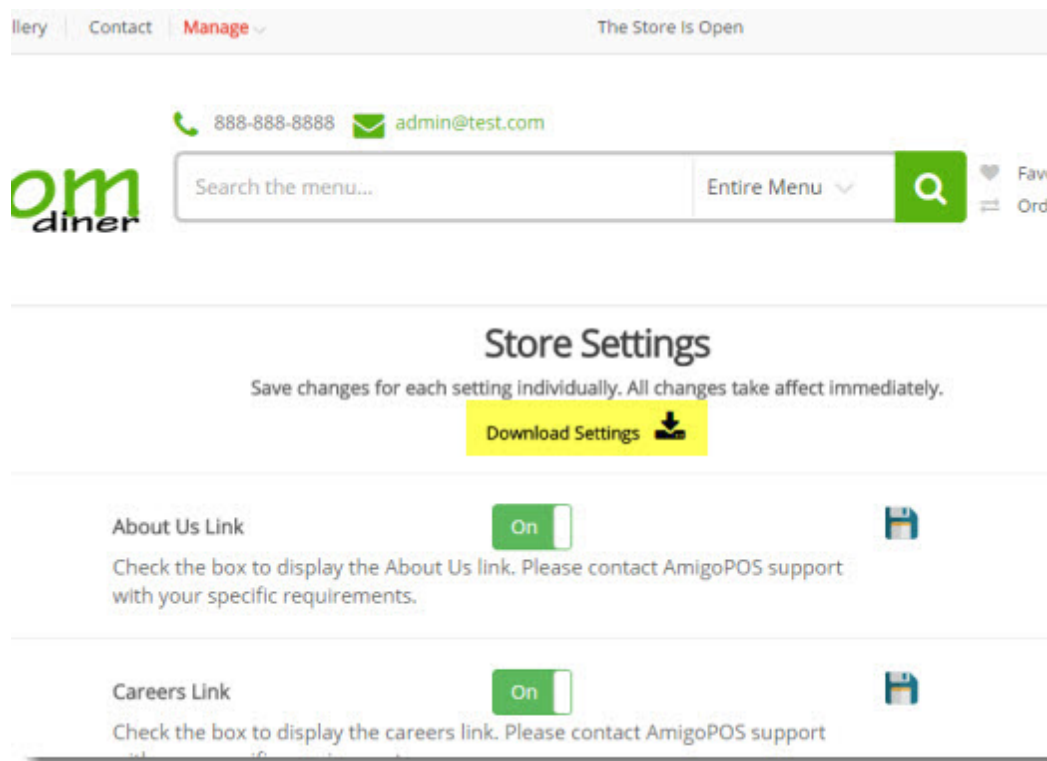
### Store Settings

After logging in, the **Manage** drop-down menu in bold red text appears at the top. Expand the menu and select **Settings**.



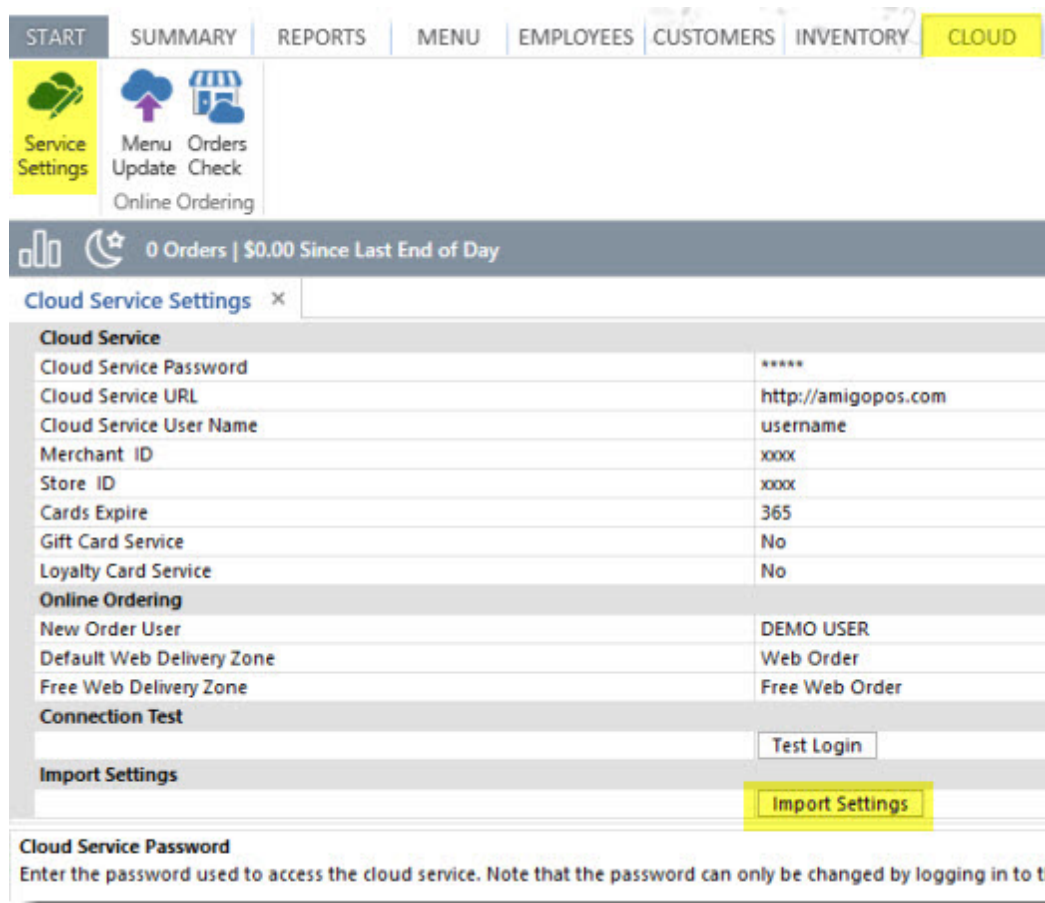
### Export Settings

All store settings appear in alphabetical order in a scrollable list. Each setting must be saved individually and all changes take effect immediately. The cloud service url, store id, merchant id and username can be exported to an XML file and imported into back office by clicking the download link at the top.



### Import Settings

Save the XML file to the local computer and open **Back Office** from the blue desktop shortcut. Log in to back office and navigate to Cloud/Service Settings. Click Import Settings and select the XML file. Note that the password must be entered manually. Click the **Test Login** button to verify that the settings are correct.



Cloud Service	
Cloud Service Password	*****
Cloud Service URL	http://amigopos.com
Cloud Service User Name	username
Merchant ID	xxxx
Store ID	xxxx
Cards Expire	365
Gift Card Service	No
Loyalty Card Service	No
Online Ordering	
New Order User	DEMO USER
Default Web Delivery Zone	Web Order
Free Web Delivery Zone	Free Web Order
Connection Test	
Test Login	
Import Settings	
Import Settings	

**Cloud Service Password**  
Enter the password used to access the cloud service. Note that the password can only be changed by logging in to the cloud service.

#### New Order User

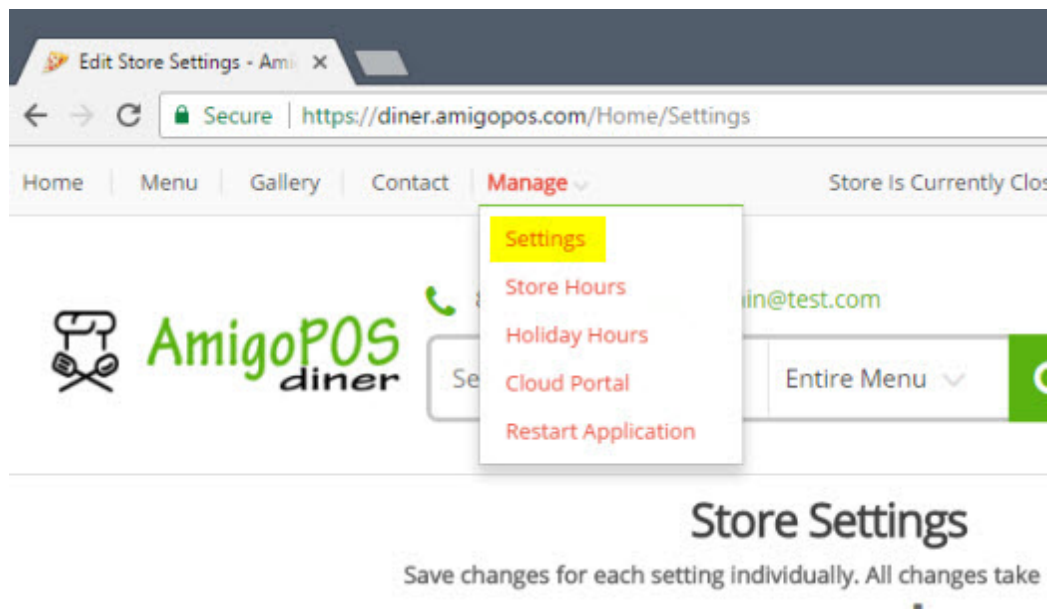
Select the default employee to use when saving new web orders. Creating a new employee specifically for web orders is recommended. Note that orders cannot be received if a valid user is not selected.

#### Delivery Zones

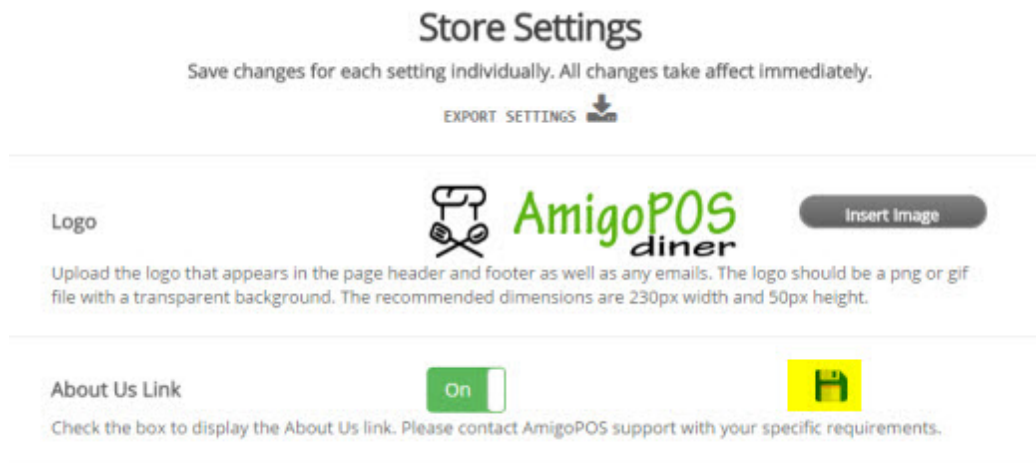
AmigoPOS 8.11.45 and later automatically creates a default delivery zone for web orders. In addition, a free delivery zone is created for order totals that exceed the free delivery limit, if enabled in the store settings.

## 23.3 Site Settings

Site settings are available by logging in to the portal and clicking Manage->Settings. All changes take effect immediately.



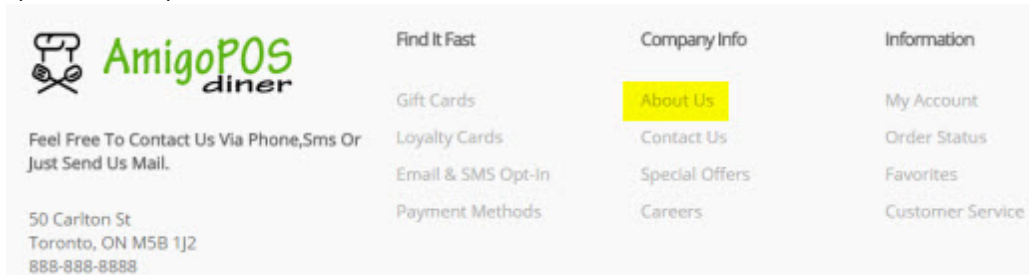
Save changes for each setting individually by clicking the Save icon at the right of each setting. All changes take effect immediately.



The following settings can be modified to customize the web site according to your requirements.


### About Us Link

Check the box to display the About Us link. Please contact AmigoPOS support with your specific requirements.



**Careers Link**

Check the box to display the careers link. Please contact AmigoPOS support with your specific requirements.

  Feel Free To Contact Us Via Phone,Sms Or Just Send Us Mail.  50 Carlton St Toronto, ON M5B 1J2 888-888-8888	<b>Find It Fast</b>  Gift Cards Loyalty Cards Email & SMS Opt-In Payment Methods	<b>Company Info</b>  About Us Contact Us Special Offers <b>Careers</b>	<b>Information</b>  My Account Order Status Favorites Customer Service
--	---	---	---

---


**Contact Name**

Enter the person that receives alerts related to online ordering and system errors.

---

**Contact Us Link**

Check the box to display the Contact Us link. Please contact AmigoPOS support with your specific requirements.

  Feel Free To Contact Us Via Phone,Sms Or Just Send Us Mail.  50 Carlton St Toronto, ON M5B 1J2 888-888-8888	<b>Find It Fast</b>  Gift Cards Loyalty Cards Email & SMS Opt-In Payment Methods	<b>Company Info</b>  About Us <b>Contact Us</b> Special Offers Careers	<b>Information</b>  My Account Order Status Favorites Customer Service
--	---	---	---

---

**Credit Card Business Name**

Enter the business name as it should appear on the credit card or PayPal transaction description.

---

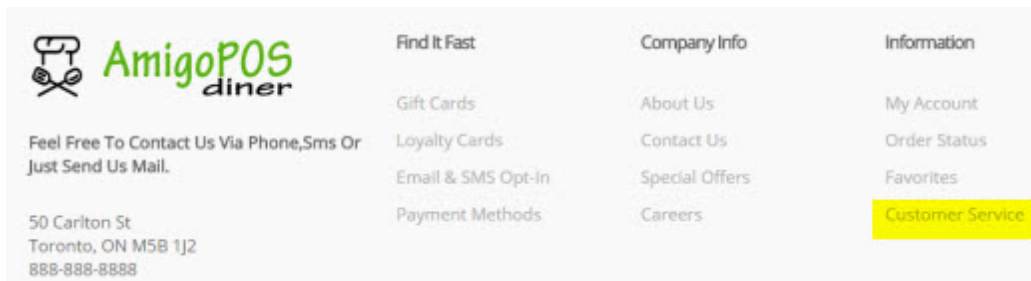
**Culture**

Enter the .Net specific culture to use for date/time and currency display. Refer to [https://msdn.microsoft.com/en-us/library/system.globalization.cultureinfo\(vs.71\).aspx](https://msdn.microsoft.com/en-us/library/system.globalization.cultureinfo(vs.71).aspx) for an updated list.

---

**Customer Service Link**

Check the box to display the customer service link. Please contact AmigoPOS support with your specific requirements.



### Delivery Charge

Enter the numeric delivery charge without the currency symbol.

### Delivery Enabled

Check the box to display the Delivery order type on the checkout page.

added.

### Delivery Method

☐ In-Store Pickup ☒ Delivery ☐ Dine In

### Dine In Enabled

Check the box to display the Dine In order type on the checkout page.

added.

### Delivery Method

☐ In-Store Pickup ☐ Delivery ☒ Dine In

### Display Name

Enter the store name as it should appear on reports

### Email Address

Email address where alerts will be sent.

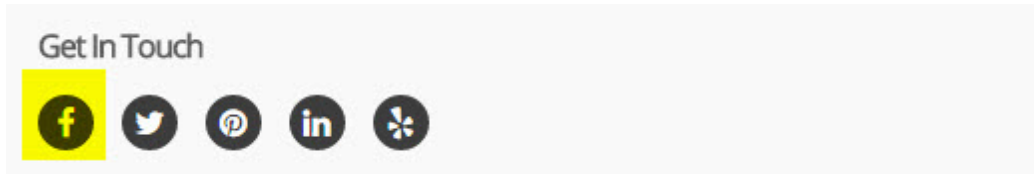
### Email Alert

Check the box to send an email when online orders are not received at the pos within the specified time interval.

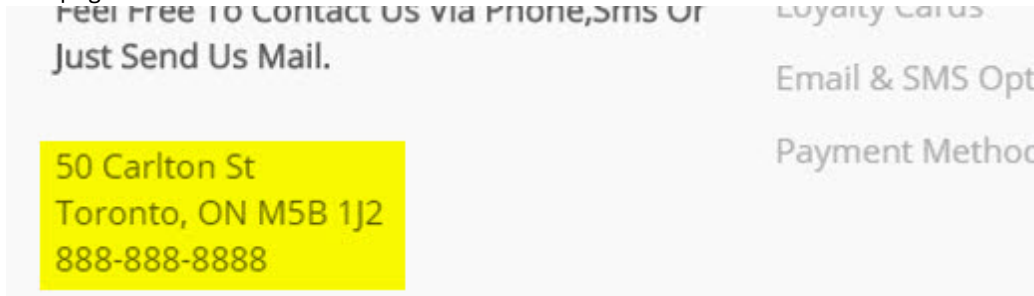
**Facebook Link**

Enter the Facebook URL for the link displayed in the page footer. Leave blank to omit the Facebook link.

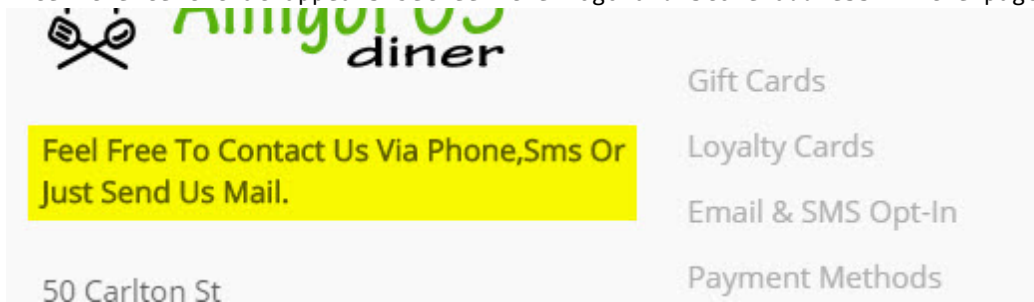
---

**Footer Address Line 1, 2, 3**

Enter the first, second and third line of the address to appear at the bottom of each web page.

**Footer Logo Text**

Enter the text that appears between the logo and store address in the page footer.

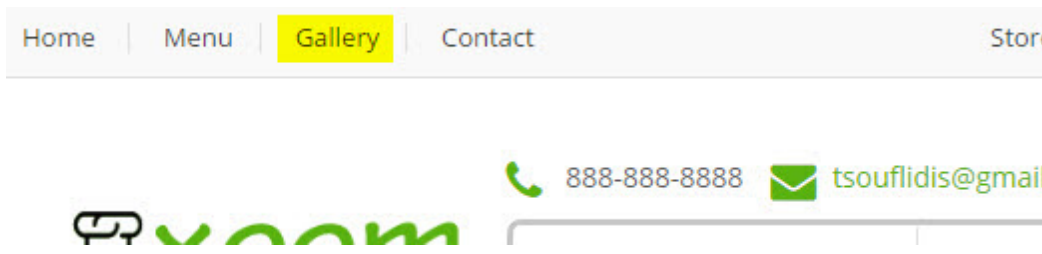
**From Email**

Reply-to email address used in customer emails.

---

**Gallery Link**

Check the box to display the gallery link. Please contact AmigoPOS support with your specific requirements.



### Gateway Country Code

Enter the country code used to process PayPal transactions.

### Gateway Merchant Login

Enter the merchant login provided in the gateway signup confirmation email.

### Gateway Merchant Password

Enter the payment gateway password provided in the gateway signup confirmation email.

### Gateway Type

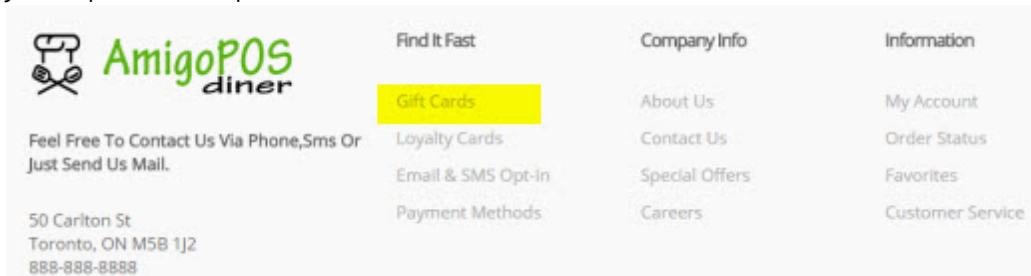
Select the credit card processor's payment gateway.

### Gateway URL

Enter the payment gateway url provided in the gateway signup confirmation email.

### Gift Cards Link

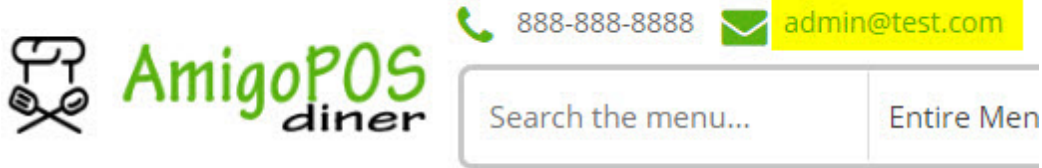
Check the box to display the gift cards link. Please contact AmigoPOS support with your specific requirements.



### Header Email

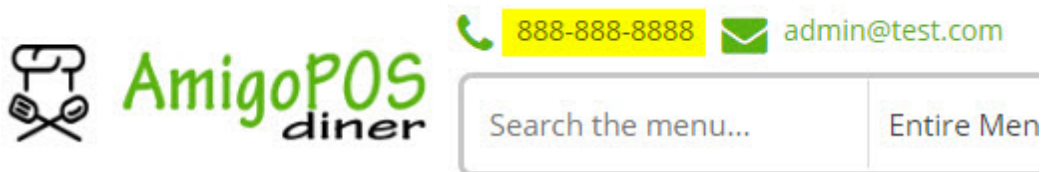
Enter the email that appears at the top of each web page.





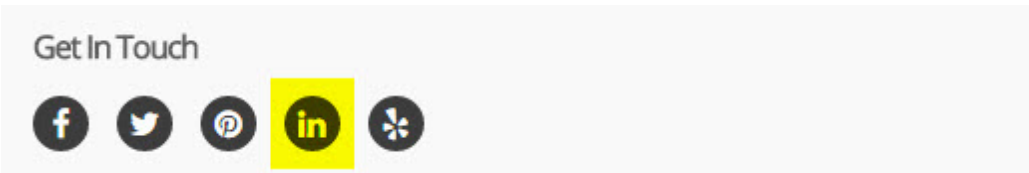
### Header Phone Number

Enter the phone number that appears at the top of each web page.



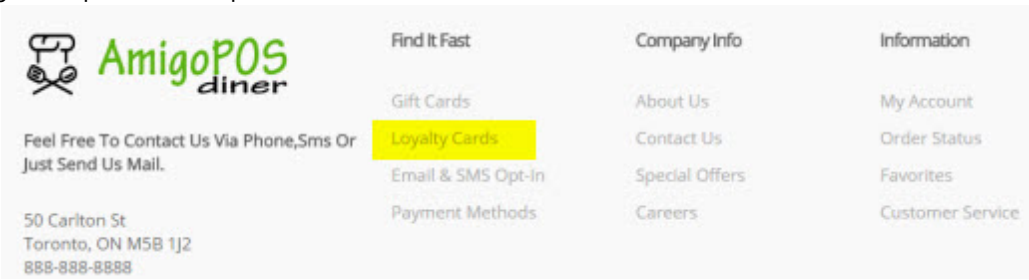
### Linked In Link

Enter the linkedin url for the link displayed in the page footer. Leave blank to omit the linkedin link.



### Loyalty Cards Link

Check the box to display the loyalty cards link. Please contact AmigoPOS support with your specific requirements.



### Map Latitude & Longitude

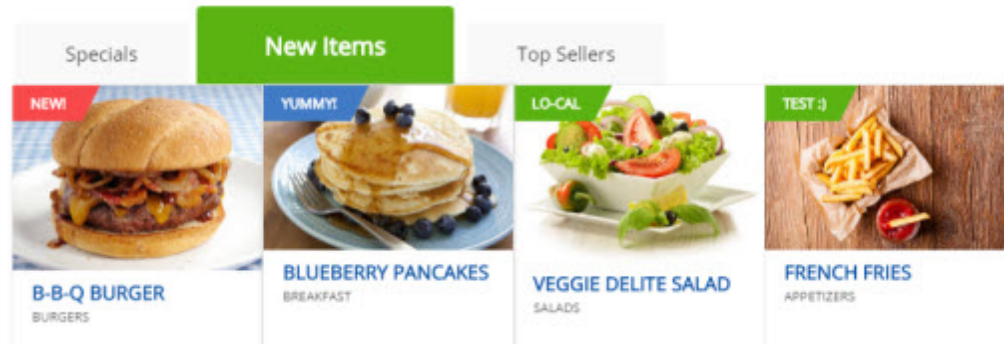
Enter the latitude & longitude used to display the location on the contact page map.

### Map Zoom Factor

Enter the zoom factor used to display the contact page map.

### New Items Tab

Check the box to display the new items tab on the home page.



### Non Receive Interval

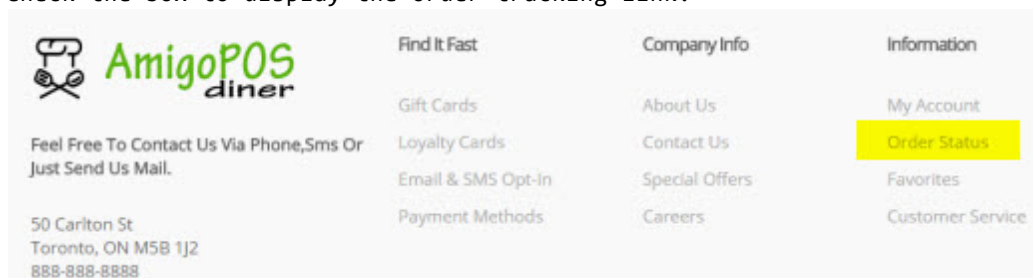
Time in minutes that will trigger an email or SMS alert if the order has not been received at the pos.

### Online Ordering Site URL

Enter the base url used to access the online ordering web site.

### Order Tracking Link

Check the box to display the order tracking link.



### Pay At Delivery Enabled

Check the box to display the Pay At Delivery payment method on the checkout page.

## Delivery Method

☐ In-Store Pickup☒ Delivery☐ Dine In

## Delivery Address

☒ Same As Billing Address☐ Different Address

## Payment

☐ Credit Card☐ PayPal☒ Pay Upon Delivery**Submit Order →**

### Pay In Store Enabled

Check the box to display the Pay In-Store payment method on the checkout page.

## Delivery Method

☒ In-Store Pickup☐ Delivery☐ Dine In

## Payment

☐ Credit Card☐ PayPal☐ Pay In Store

### PayPal Country Code

Enter the country code used to process PayPal transactions.

**PayPal Currency Code**

Enter the currency code used to process PayPal transactions.

---

**PayPal Email**

Enter the email address used to sign up for the PayPal account.

---

**PayPal Payment Enabled**

Check the box to display the PayPal payment method on the checkout page.

---

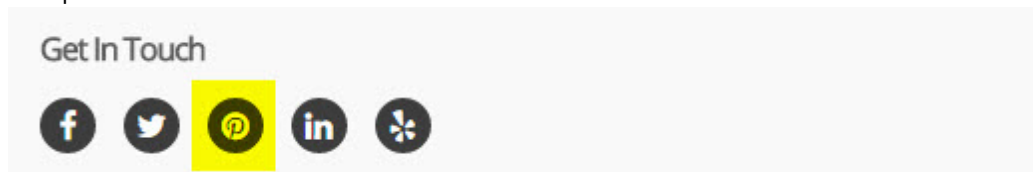
**PayPal Use Sandbox**

Set to Yes to use the PayPal Sandbox for initial setup and testing. Note that payments will not be processed when this setting is enabled.

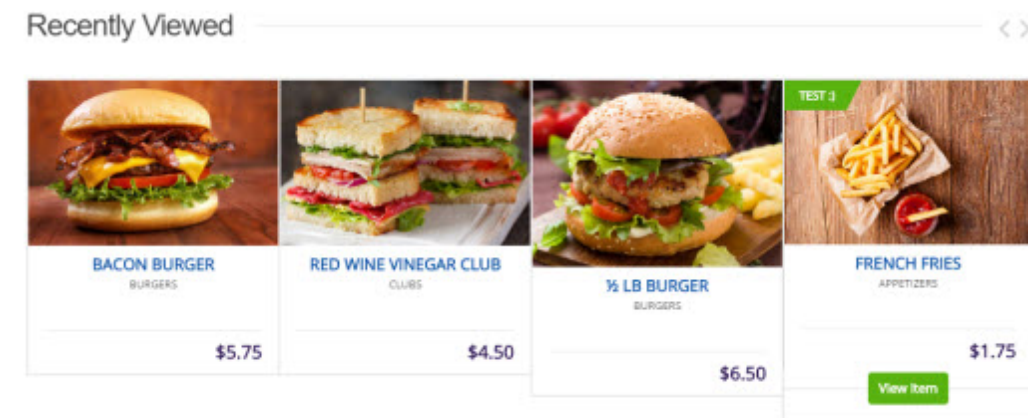
---

**Pinterest Link**

Enter the Pinterest url for the link displayed in the page footer. Leave blank to omit the pinterest link.

**Recently Viewed**

Check the box to display the recently viewed tab.

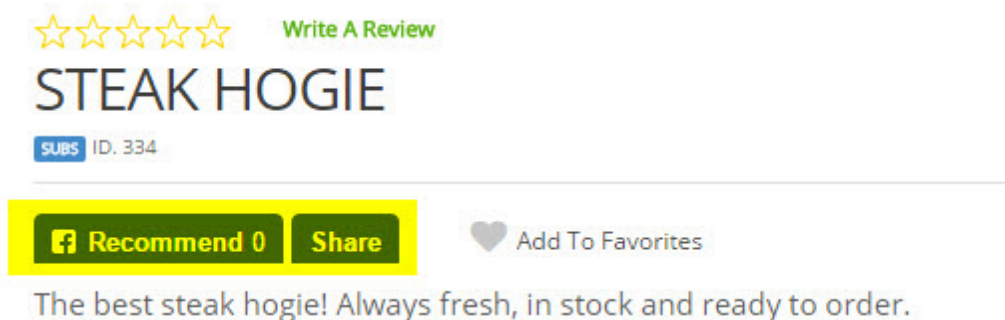
**Require Login To Checkout**

Check the box to force the customer to login in order to access the checkout page. This option is disabled in the beta and the customer is always required to login to place the order.

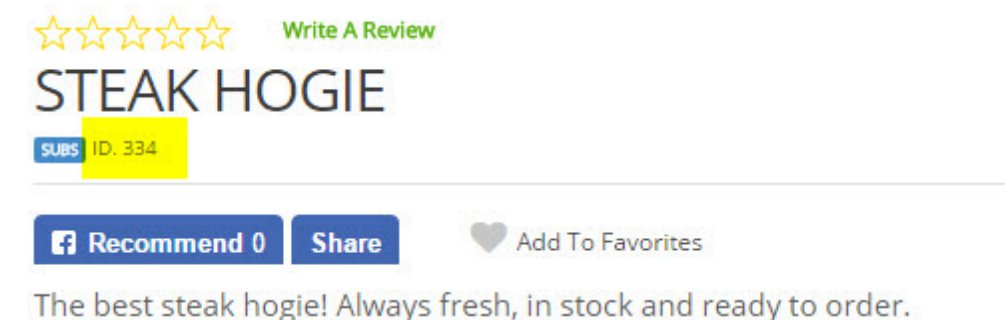
---

**Show Facebook Like**

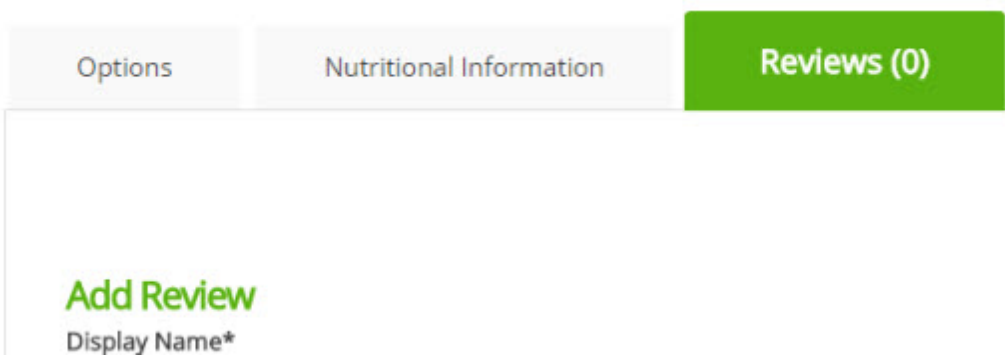
Check the box to display the facebook like link on the item details page.

**Show Item ID**

Check the box to display the item id on the item details page. This feature is useful for troubleshooting menu upload issues.

**Show Reviews Tab**

Check the box to display the reviews tab on the item details page.

**Site Theme**

Enter the color to use throughout the site. Valid options are blue, dark-green, green, navy, orange and red.

**SMS Alert**

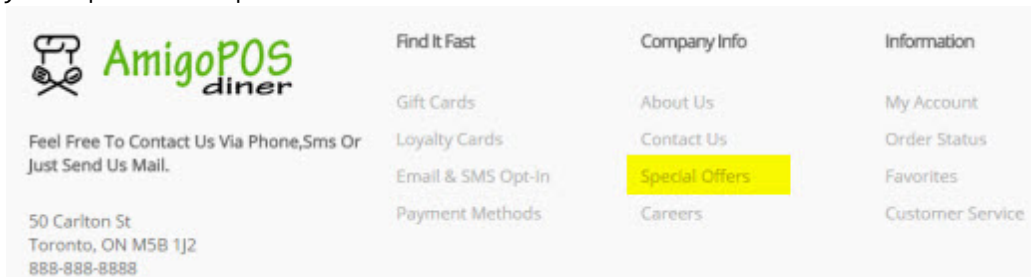
Check the box to send an SMS when online orders are not received at the pos within the specified time interval.

### SMS Phone

Mobile phone number where SMS alerts will be sent.

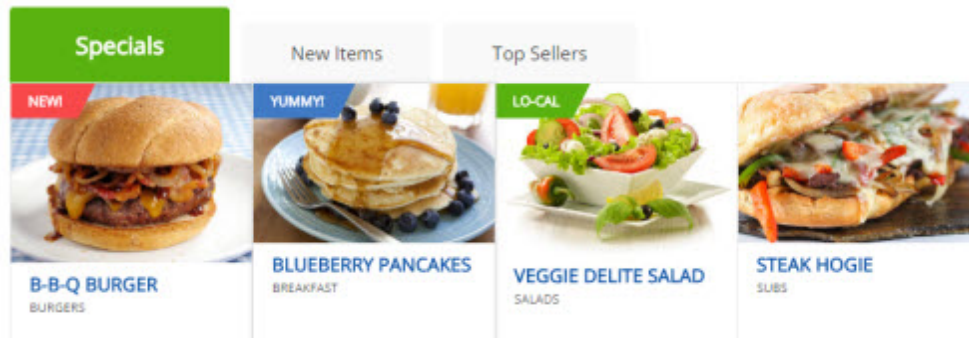
### Special Offers Link

Check the box to display the special offers link. Please contact AmigoPOS support with your specific requirements.



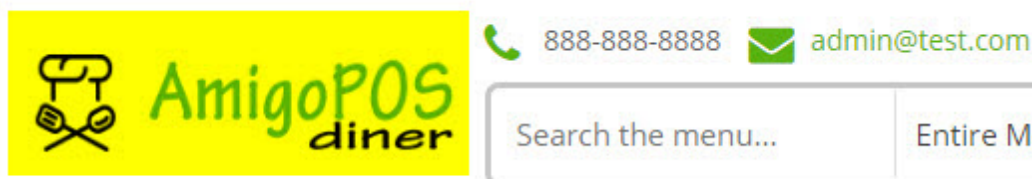
### Specials Tab

Check the box to display the specials tab on the home page.



### Store Logo

Upload the logo that appears in the page header and footer as well as any emails



### Store Pickup Enabled

Check the box to display the Store Pickup order type on the checkout page.

added.

## Delivery Method


☒ In-Store Pickup

☐ Delivery

☐ Dine In

### Subscribe Newsletter Link

Check the box to display the newsletter subscription link. This feature is currently in development.

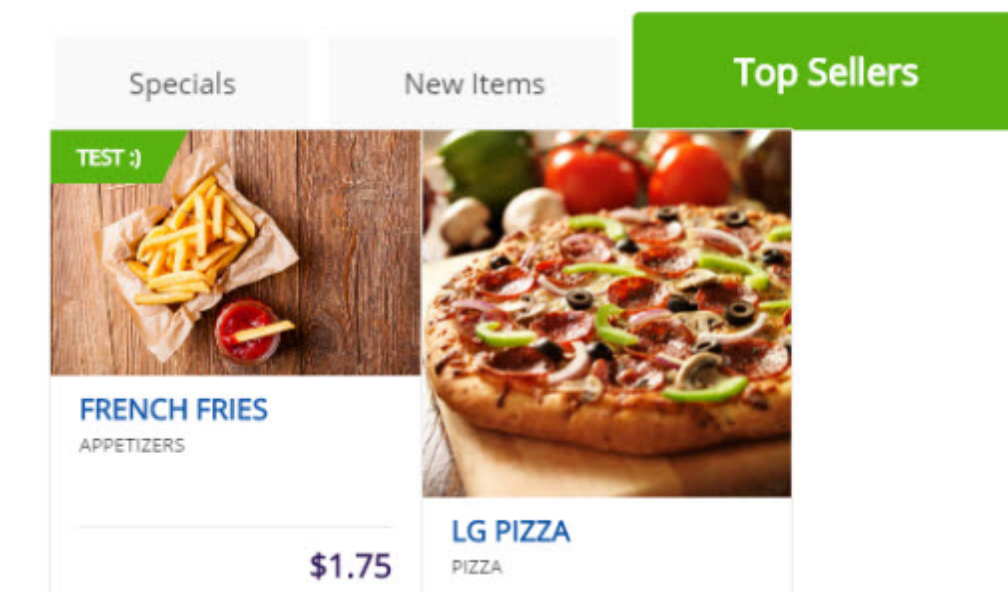

[Find It Fast](#)
[Company Info](#)
[Inform](#)

### Time Offset

The difference between the local time and UTC. use a negative sign if the time is behind UTC.

### Top Sellers Tab

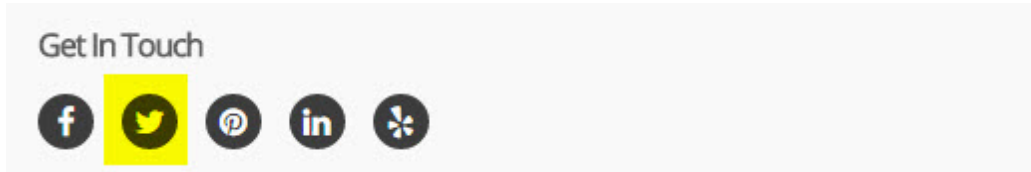
Check the box to display the top sellers tab on the home page.





### Twitter Link

Enter the twitter url for the link displayed in the page footer. Leave blank to omit the twitter link.



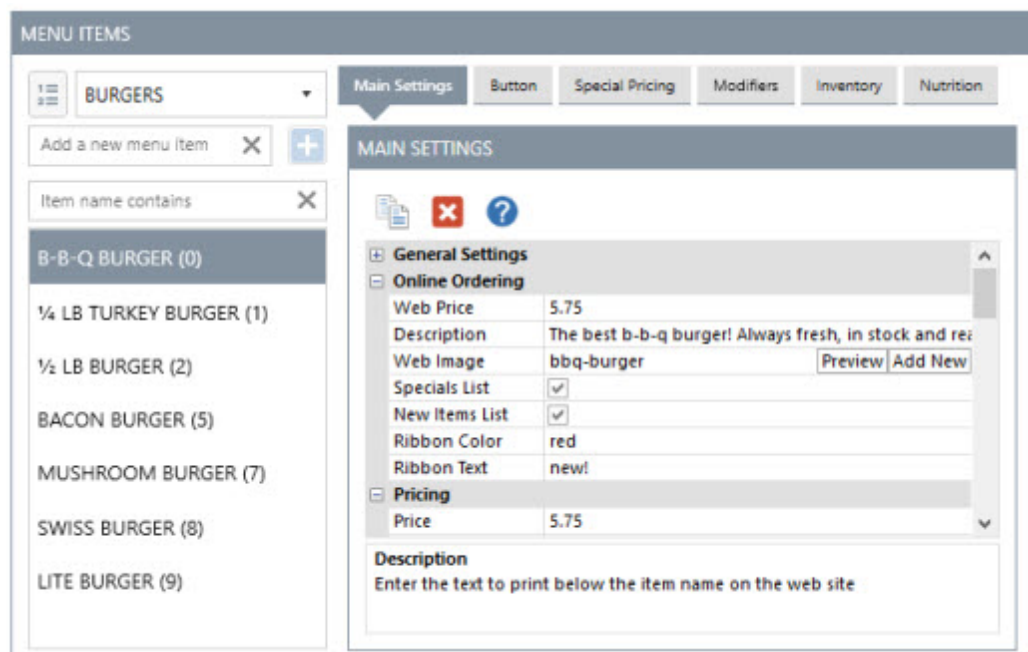
### Yelp Link

Enter the Yelp url for the link displayed in the page footer. Leave blank to omit the yelp link.



## 23.4 Menu Setup

Online ordering is currently available for regular menu items only. Open the menu item editor and select any regular menu item. The Online Ordering settings tab displays most common settings that are used to customize each menu item for online ordering. The information displayed in the Nutritional Information tab is described in the [next](#) <sup>[917]</sup> help topic.



The following settings are available for each regular menu item:

**Web Price:** Each menu item must be assigned a price specifically for online ordering





☆☆☆☆☆ [Write A Review](#)

## B-B-Q BURGER

BURGERS ID. 279

[Recommend 0](#) [Share](#)

The best b-b-q burger! Always f

Optional: who is this for?

Optional: enter any item notes

**\$5.75** ~~\$5.75 ea~~

[Add To Order](#)

**Description:** The description that appears on the product details page

☆☆☆☆☆ [Write A Review](#)

## B-B-Q BURGER

BURGERS ID. 279

[Recommend 0](#) [Share](#) [Add To Favorites](#)

The best b-b-q burger! Always fresh, in stock and ready to order.

Optional: who is this for?

**Web Image:** Select the image to appear on the product details page. A jpg or png image is recommended for best results. A default placeholder will be displayed if an image is not selected. The recommended size is approximately 320x240.



B-B

BURGERS



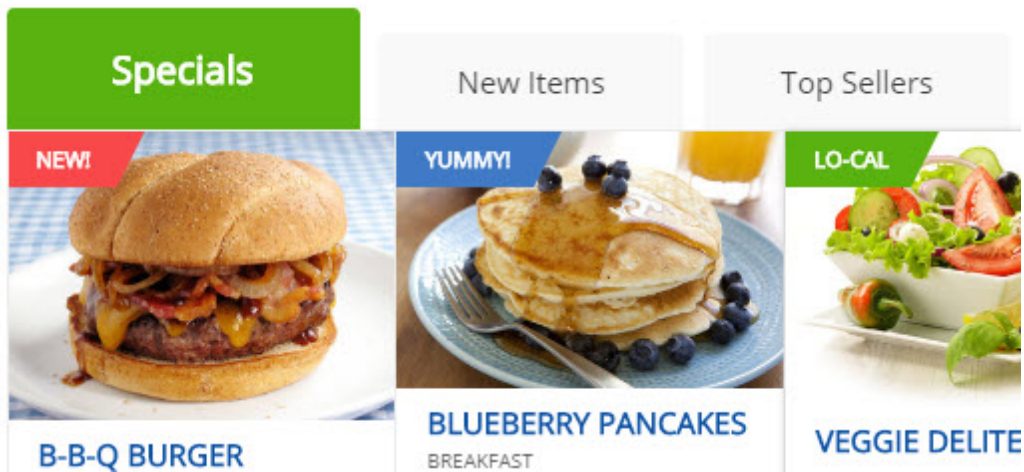
The be

Opti

Opti

\$5

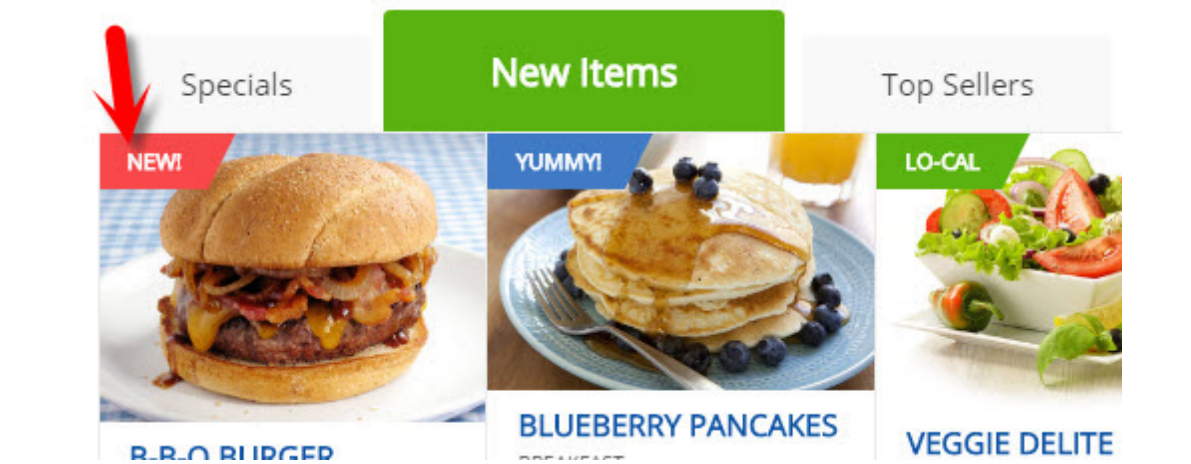
**Specials List:** Display the item on the Specials tab.



**New Items List:** Display the item on the New Items tab



**Ribbon Color:** This optional setting specifies the color for the small ribbon that is used to draw attention to the item. Available colors are green, red and blue. The image below displays a red ribbon for the B-B-Q Burger, a blue ribbon for the Blueberry Pancakes and a green ribbon for the Lo-Cal Salad.



**Ribbon Text:** The text to appear on the ribbon. The text **NEW!** is used in the following image.



## 23.5 Nutritional Information

The product details page can display nutritional information between the modifiers and reviews tabs.

Options	Nutritional Information	Reviews (0)
Calories	380	
Protein	5g	
Carbohydrates	53g	
Sugar	0g	
Fat	17g	
Saturated Fat	3g	
Trans Fat	0g	
Cholesterol	0mg	
Sodium	570mg	

Open the menu item editor and select any regular menu item. Click the Nutrition tab at the right and enter the description and value in the gray new row field at the top. Click Enter to save the new entry. The position can be adjusted to display the more important items at the top. Note that the Nutritional Information tab on the product details page is automatically hidden if the menu item does not have and nutrition information entered.

MENU ITEMS

BURGERS

Add a new menu item

+

Item name contains

B-B-Q BURGER (0)

¼ LB TURKEY BURGER (1)

½ LB BURGER (2)

BACON BURGER (5)

MUSHROOM BURGER (7)

SWISS BURGER (8)

LITE BURGER (9)

Main Settings

Button

Special Pricing

Modifiers

Inventory

Nutrition

NUTRITION

DESCRIPTION	VALUE	POSITION	
Click here to add a new row			
Calories	380	1	X
Protein	5g	2	X
Carbohydrates	53g	3	X
Sugar	0g	4	X
Fat	17g	5	X
Saturated Fat	3g	6	X
Trans Fat	0g	7	X
Cholesterol	0mg	8	X
Sodium	570mg	9	X

## 23.6 Payment Methods






The online ordering service currently supports credit card, PayPal, Pay In-Store and Pay at Delivery payment methods. Each payment type can be enabled by logging in to the portal and editing the site settings.



## 23.6.1 Credit Card Gateways

### Credit Card Payment Gateways

Obtain the url, merchant id and API password directly from the credit card payment processor/gateway settings page and enter the credentials in the settings page as shown below.

<b>Gateway Country Code</b>	<input type="text" value="US"/>	
Enter the country code used to process PayPal transactions.		
<b>Gateway Merchant Login</b>	<input type="text" value="cnpdev1047"/>	
Enter the merchant login provided in the gateway signup confirmation email.		
<b>Gateway Merchant Password</b>	<input type="password" value="....."/>	
Enter the payment gateway password provided in the gateway signup confirmation email.		
<b>Gateway Type</b>	<input type="text" value="1"/>	
Select the credit card processor's payment gateway.		
<b>Gateway URL</b>	<input type="text" value="https://test.authorize.net/gateway/tran"/>	
Enter the payment gateway url provided in the gateway signup confirmation email.		

As of this writing (February 15, 2017), the following payment gateways are supported:

- [Authorize.Net AIM](#)
- [eProcessing Transparent Database Engine](#)
- [iTransact RediCharge HTML](#)
- [NetBilling DirectMode](#)
- [Verisign PayFlow Pro](#)
- [USA ePay CGI Transaction Gateway](#)
- [Plug 'n Pay](#)
- [Planet Payment iPay](#)
- [MPCS](#)
- [RTWare](#)
- [ECX](#)
- [Bank of America \(Global Gateway e4\)](#)
- [Merchant Anywhere \(Transaction Central\)](#)
- [SkipJack](#)

- [Intuit Payment Solutions](#) (Formerly called ECHOnline)
- [TrustCommerce API](#)
- [PayFuse XML \(ClearCommerce Engine\)](#)
- [LinkPoint](#)
- [Fast Transact VeloCT](#) (Direct Mode)
- [NetworkMerchants Direct-Post API](#)
- [TransFirst Transaction Central Classic](#) (formerly PRIGate)
- [First Data Global Gateway](#) (Linkpoint)
- [YourPay](#) (Linkpoint)
- [ACH Payments AGI](#)
- [Payments Gateway AGI](#)
- [Cyber Source SOAP API](#)
- [goEmerchant XML](#)
- [Chase Merchant Services](#) (Linkpoint)
- [Thompson Merchant Services NexCommerce](#) (iTransact mode)
- [TransFirst Transaction Central](#) (This is different from TransFirst elink, supported above. The TransactionCentral gateway is also used by MerchantAnywhere and PRIGate)
- [Sterling SPOT XML API](#) (HTTPS POST)
- [PayJunction Trinity Gateway](#)
- [Elavon/NOVA/My Virtual Merchant](#)
- [Verifi Direct-Post API](#)
- [Merchant E-Solutions Payment Gateway](#) (Trident API)
- [PayLeap Web Services API](#)
- [Worldpay XML](#) (Direct/Invisible)
- [ProPay Merchant Services API](#)
- [Intuit QuickBooks Merchant Services](#) (QBMS)
- [Heartland POS Gateway](#)
- [Litle Online Gateway](#) (Vantiv)
- [JetPay Gateway](#)
- [HSBC XML API](#) (ClearCommerce Engine)
- [BluePay 2.0 Post](#)
- [PayTrace Payment Gateway](#)
- [TransNational Bankcard](#)
- [First Data Global Gateway E4](#)
- [Bluefin](#)
- [Payscape](#)

## 23.7 Coupons

## 23.8 Loyalty Cards

## 23.9 Gift Cards

## 23.10 Customization & Logo

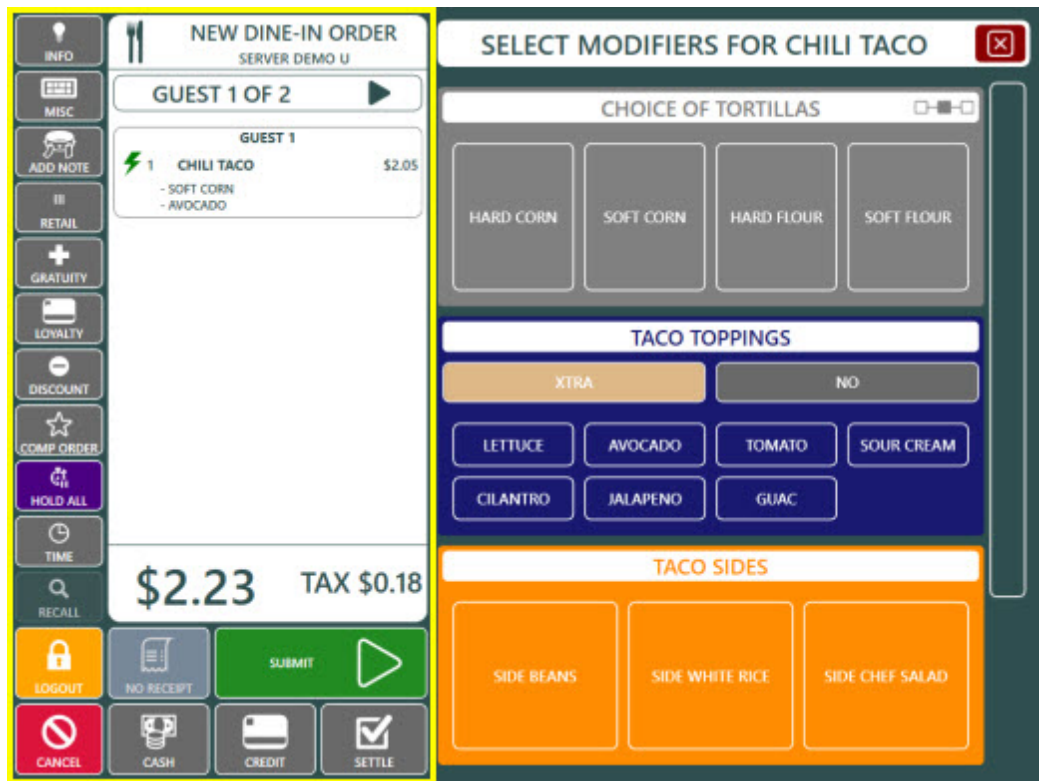
Part 24

# Order Management

## 24 Order Management

### 24.1 Order Entry Screen Overview

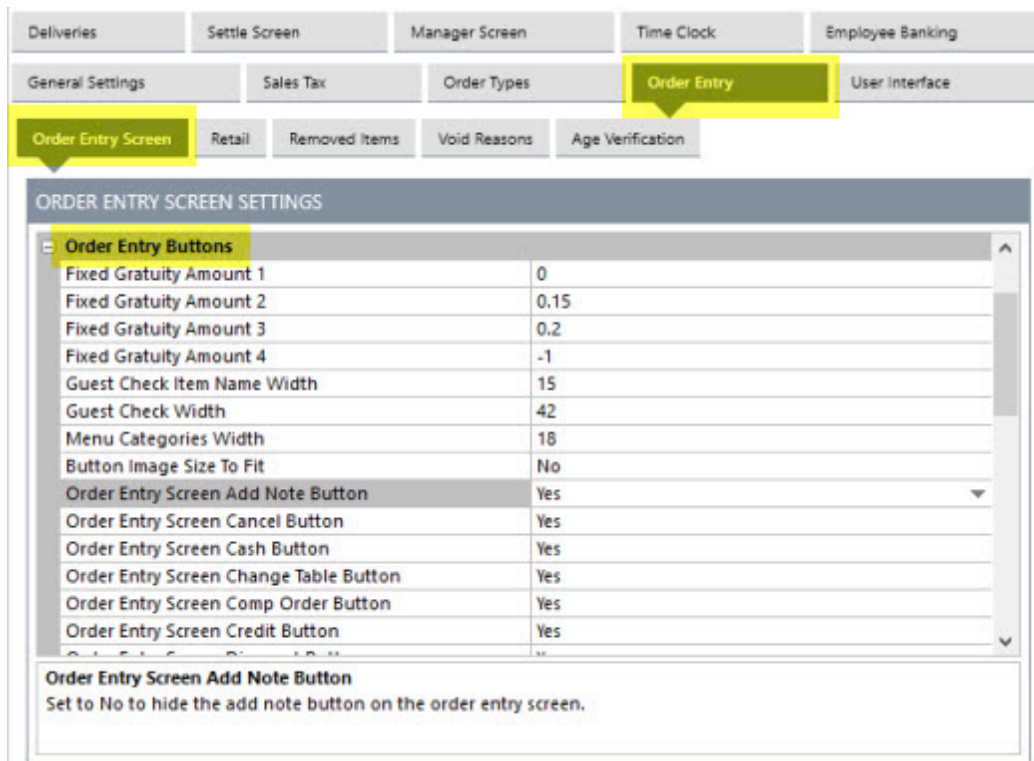
The order entry screen functions described below apply to both regular and bar menu categories. Bar menu specific functions such as [upcharge buttons](#)<sup>[873]</sup> and [bar tabs](#)<sup>[282]</sup> appear only when a bar menu category is selected. Retail item buttons such as SKU, PLU and random weight barcodes are described [here](#)<sup>[880]</sup>.



Order Entry Screen Buttons

The visibility of most order entry screen buttons can be set in **Back Office>Settings>Main Settings>Order Entry>Order Entry Screen>Order Entry Buttons**. The accessibility of other buttons can be set using employee permissions.



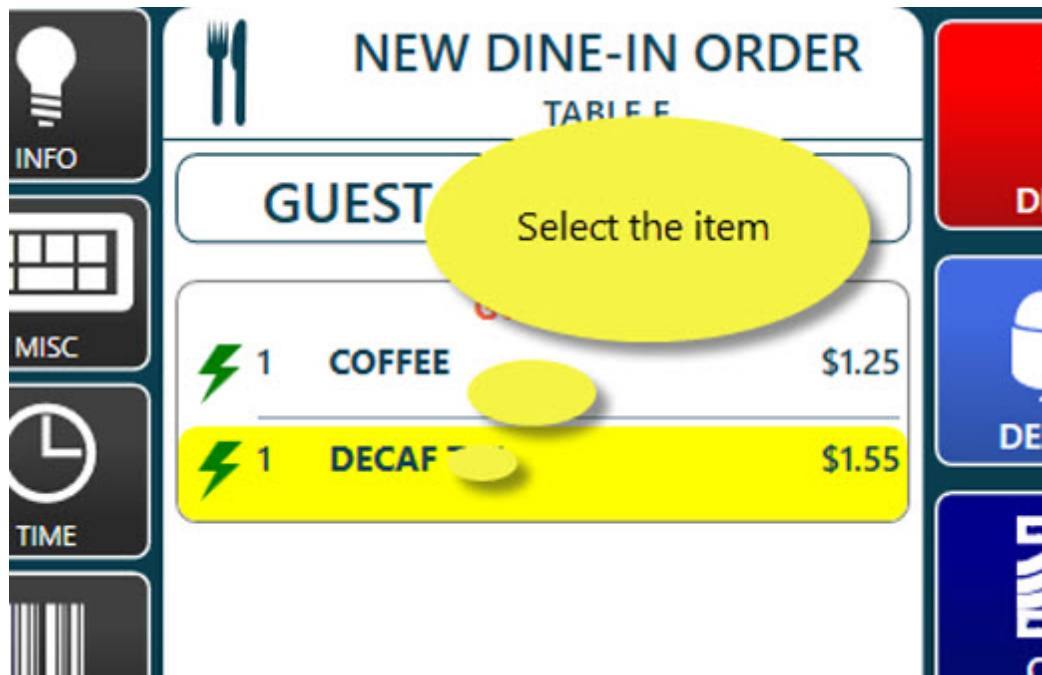


The order entry screen provides easy access to most common order functions and offers the user the ability to restrict access to functions based on the user permission.

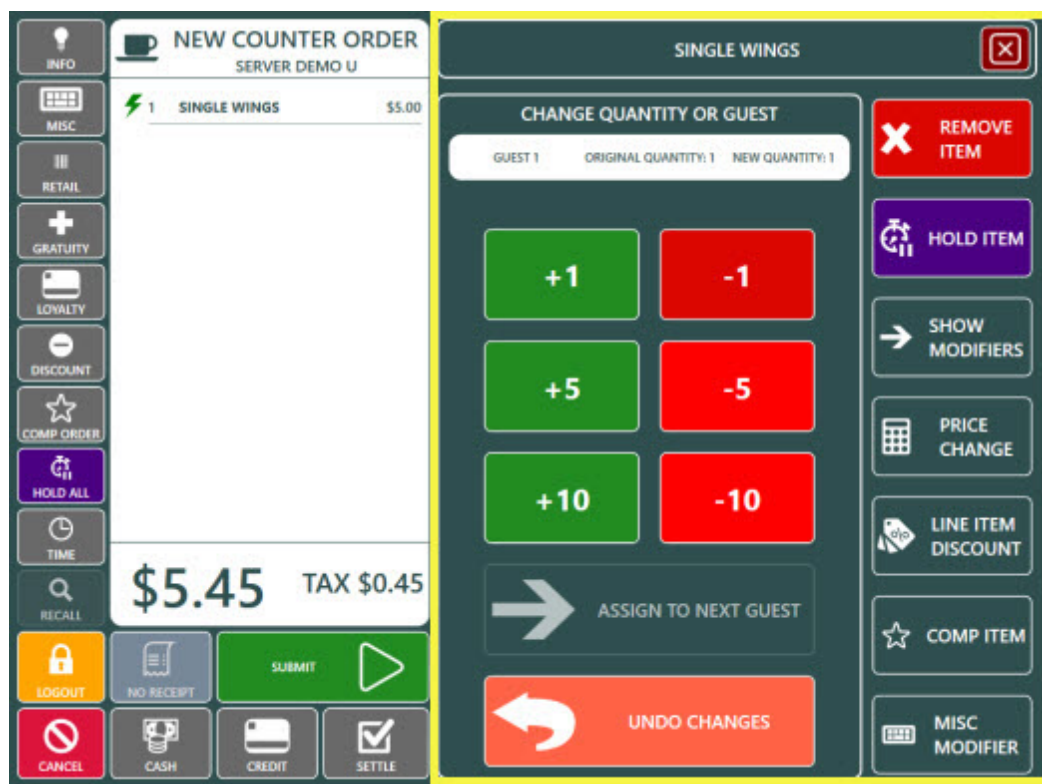
- **INFO:** Display order options including Server Transfer, Change Table, Add Gratuity and Customer Information. Some options may be disabled depending on order type and user permissions.
- **MISC:** Add an item to the order using the on-screen keyboard to enter the item name and price
- **ADD NOTE:** Add a note to the top of the prep ticket
- **TIME:** Show the time options screen where the order can be [scheduled for a future date/time](#)<sup>[92]</sup> or the selected order item can be prevented from printing at the prep printers.
- **RETAIL:** View SKU, PLU, item lookup and price change buttons. Press again to hide the retail screen.
- **DISCOUNT:** Add or modify order discounts
- **HOLD ALL:** Hold all items on the order. Useful when a new order must be entered before the current order has been submitted. All items are placed "on hold" and are sent to the prep printers the next time the order is recalled and submitted.
- **LOYALTY:** Swipe the loyalty card or enter the loyalty card number using the on-screen keypad
- **RECALL:** Display a list of orders on the main screen
- **LOGOUT:** Discard all changes and logout (a confirmation screen appears if new order items exist)
- **CANCEL:** Discard all changes and return to the main screen (a confirmation message appears if new order items exist)
- **PRINT RECEIPT/NO RECEIPT:** Toggle the button to enable/disable customer receipt printing upon order submission. Set the default value in **Back Office>Settings>Main Settings>Order Entry**, as shown [here](#)<sup>[95]</sup>
- **SUBMIT:** Save the order, print prep tickets and customer receipt
- **CASH:** Submit the order and settle using the cash payment method
- **CREDIT:** Submit the order and settle using the credit payment method

- **SETTLE:** Submit the order and open the settle screen
- **GUESTS:** Press to increase/decrease the number of guests
- **ACTIVE GUEST:** Change the active guest. Available only for order types that assign order items to guests

#### Order Item Quantity Adjustment



Select the item to show available options



### Item Options

To change the quantity of any order item, use the Up/Down arrows to select the item and press the Qty button at the top left. Note that selecting a menu item optional is the same as selecting the menu item.

1. **Add/Subtract/Multiply:** Press the add, subtract or multiply the amount shown from the item selected item's current quantity. If the item has a quantity of 1, pressing the Subtract button will have no effect
2. **Reset Quantity/Start Over:** revert to the value of the order item quantity when the Qty button was pressed
3. **Assign to Next Guest:** For Dine-In orders, assign the current item to the next guest. For example, if the table has 3 guests and the current selection is assigned to guest 3, pressing the button will assign the item to guest 1, pressing it again will assign to guest 2, etc.

### Scheduled Orders

**SET ORDER START TIME**

**CURRENT SELECTION**  
Fri 2 Jan 4:08 AM

**SELECT THE DATE**

JANUARY	JULY	1	7	13	19	25
FEBRUARY	AUGUST	2	8	14	20	26
MARCH	SEPTEMBER	3	9	15	21	27
APRIL	OCTOBER	4	10	16	22	28
MAY	NOVEMBER	5	11	17	23	29
JUNE	DECEMBER	6	12	18	24	30
		31				

**SELECT THE TIME**

1	7	:00
2	8	:10
3	9	:15
4	10	:20
5	11	:30
6	12	:45
		AM
		PM

**CANCEL** **START NOW** **UPDATE ORDER**

### Delay Order Start Time

Orders can be scheduled for a future date/time. Press the [Time](#) button followed by the **SET ORDER START TIME** button to display the time entry screen. Use a physical keyboard to set the date/time using the calendar and time control on the left or manually set the date and time by pressing the buttons. The date/time is saved when the order is submitted. To clear the date/time, reopen the screen and press the CANCEL/START NOW button (and submit the order).

When changing the order start time:

- The prep ticket will print the start time at the top (using the same text settings for the prep ticket header items)
- The customer receipt will print the start time at the top
- The remote display application will display the order only after the specified date/time
- The end of day can be run with open orders that are scheduled for a future date/time, unless the date/time has passed, in which case the order must be settled or voided.
- The order will appear normally on the recall list (and web orders list)
- The order will not appear on the server liability report unless the date/time has passed, in which case the order must be settled or voided.
- The order will not be considered "open" on the time clock screen so that employees can still clock-out when the *Prevent Open Orders Clock Out* setting is set to Yes.

## 24.2 Recall Order

To recall an order, press the Recall button on the start screen and either scan the barcode at the bottom of the customer receipt or select the order from the list.



Order Recall List

Alternately, press the **LOOKUP** button to enter the order id.



Search By Order ID

## 24.3 Settle (Close) Order

AmigoPOS includes the ability to accept multiple payment types for settlement of a single order. The order is considered settled when the amount received is equal to or more than the order total. When the order is settled, it no longer appears on the order recall screen. To begin, log in and press the **Settle** button under the **Transactions** button group on the start screen. The user must have appropriate permissions to settle an order.



Order Settlement from the Main Screen

Select the payment method and follow the on-screen prompts to complete the transaction. The **TRANSACTIONS** button is used to view and void existing transactions. This button is enabled only if the order has at least one transaction.

NUMBER	4
TYPE	DINE-IN
SERVER	DEMO USER
STARTED	2/8/2016 10:42 AM
SUBTOTAL	\$5.60
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.50
TOTAL	\$6.10
RECEIVED	\$0.00

TRANSACTION RECALL PRINT RECEIPT CANCEL

SELECT THE PAYMENT METHOD

- CASH
- CREDIT CARD
- DEBIT CARD
- LOYALTY CARD
- GIFT CARD
- GIFT CERTIFICATE
- ROOM CHARGE
- FOREIGN CURRENCY
- HOUSE ACCOUNT
- CHECK
- MANUAL CREDIT

### Payment Method Selection

Payment types are configured in Back Office/Settings/Main SettingsSettle Screen.



Main Settings X

Settle Screen

Payment Types Currency Shortcuts Foreign Currency Cash Payouts Local Payment Types

Payment Types

List View

Description	Button Caption	Button Position	Hide	Open Drawer
▶ Cash	CASH	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Credit Card	CREDIT CARD	2	<input type="checkbox"/>	<input type="checkbox"/>
Debit Card	DEBIT CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
Gift Card	GIFT CARD	4	<input type="checkbox"/>	<input type="checkbox"/>
Gift Certificate	GIFT CERTIFICATE	5	<input type="checkbox"/>	<input type="checkbox"/>
Room Charge	ROOM CHARGE	6	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Currency	FOREIGN CURRE...	7	<input type="checkbox"/>	<input type="checkbox"/>
House Account	HOUSE ACCOUNT	8	<input type="checkbox"/>	<input type="checkbox"/>
Cash Bank	CASH BANK	9	<input type="checkbox"/>	<input type="checkbox"/>
Check	CHECK	10	<input type="checkbox"/>	<input type="checkbox"/>
LOYALTY CARD	LOYALTY CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
Manual Credit	MANUAL CREDIT	11	<input type="checkbox"/>	<input type="checkbox"/>

User Interface  
 General Settings  
 Delivers  
 Sales Tax  
 Settle Screen  
 Manager Screen  
 Order Types  
 Time Clock & Banking  
 Order Entry

### Payment Methods Configuration

NUMBER	4
TYPE	DINE-IN
SERVER	DEMO USER
STARTED	2/8/2016 10:42 AM
SUBTOTAL	\$5.60
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.50
TOTAL	\$6.10
RECEIVED	\$0.00

TRANSACTION RECALL PRINT RECEIPT CANCEL

**CASH TRANSACTION**

ENTER THE AMOUNT TENDERED

CHANGE PAYMENT METHOD

\$1 \$5 \$10 \$20 \$50 \$100

1 2 3

4 5 6

7 8 9

0

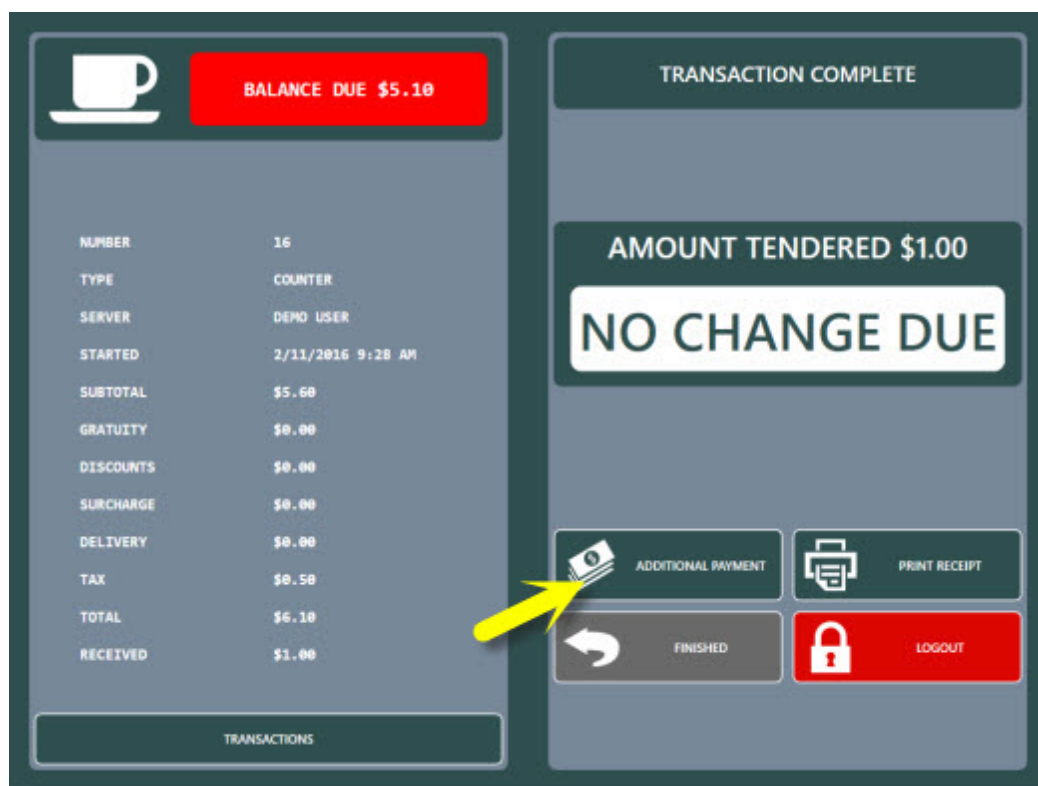
EXACT CHANGE

NEXT \$ AMOUNT

CONTINUE

### Cash Transaction

After selecting the payment type, enter the required information and press the **CONTINUE** button.



### Change Due

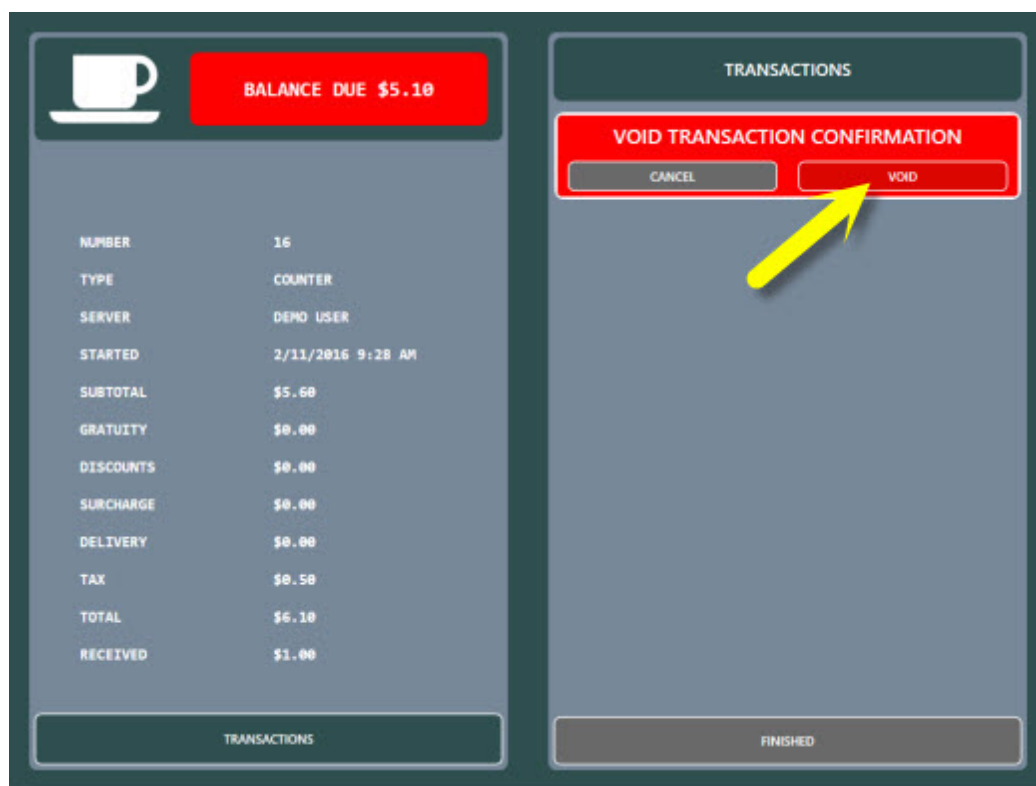
The cash drawer will open for some transaction types. Press the **ADDITIONAL PAYMENT** button to add another payment to the order. The **ADDITIONAL PAYMENT** will not appear if the order balance is zero.

NUMBER	16
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/11/2016 9:28 AM
SUBTOTAL	\$5.60
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.50
TOTAL	\$6.10
RECEIVED	\$1.00

TRANSACTIONS		
CASH	\$1.00	VOID
2/11/2016 09:28	DEMO USER	

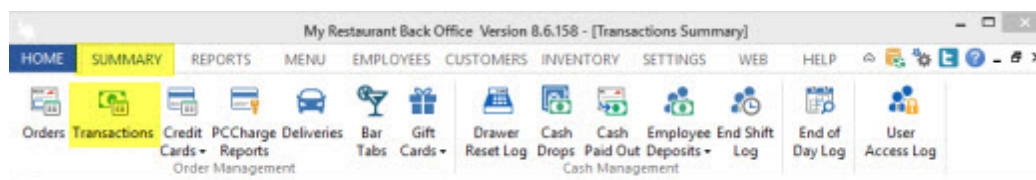
#### Transactions View

If a mistake is made, reopen the order and press the **VIEW TRANSACTIONS** button. Select the transaction and press the **VOID** button to void the transaction.



#### Void Transaction Confirmation

Review the information displayed on the void transaction confirmation screen. If correct, press the green button.



#### Back Office > Summary > Transactions

**Transactions Summary** X

**Actions**

Update Results [F5]  
Exit

**Date Range**

☐ Current Business Day  
☒ Specify Dates

12/26/2014  
1/ 2/2015

**Data Filters**

\*Expanded View  
\*All Transaction Types  
\*All Cashiers  
\*Include Voids  
\*Return All Rows

**Advanced Filters**

**Tools**

**Transactions Summary**  
Date Range: 12/25/2014 6:00 AM - 1/3/2015 5:59 AM  
83 rows returned with no data filters applied  
[Print List](#)

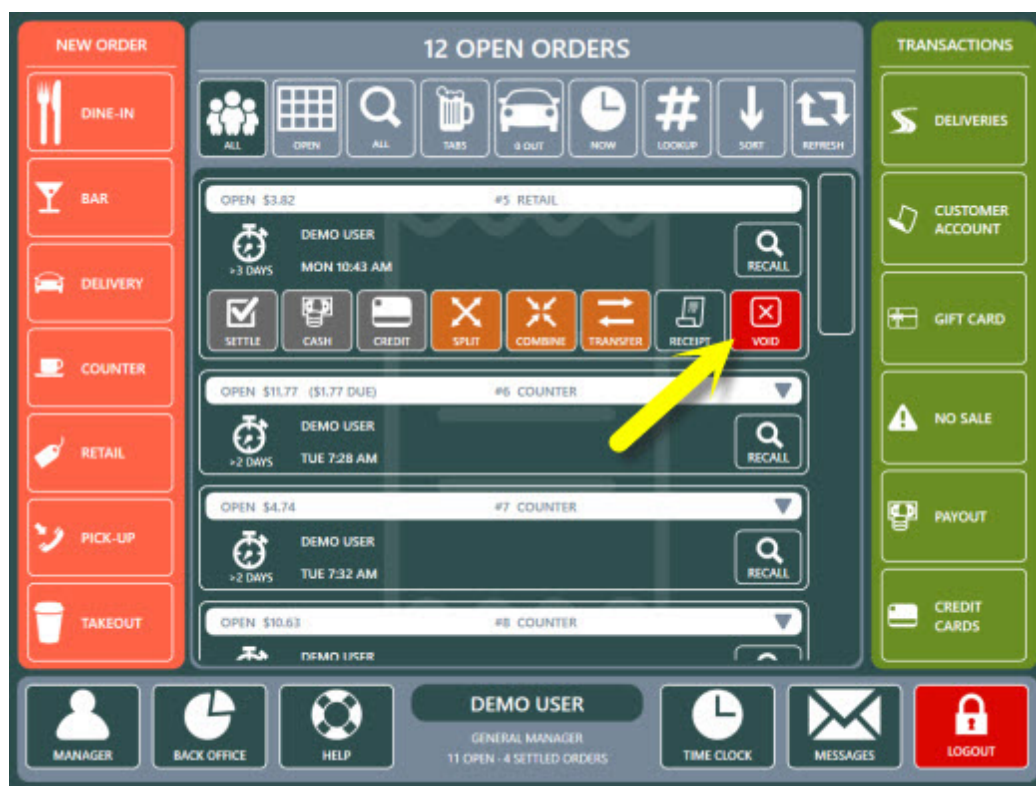
#2 - CASH	<a href="#">Order #1</a>	Amount :\$8.43	Edit
Cashier: USER, DEMO	Station/Drawer: 1/1	Gratuity :\$0.00	Void
Tendered :\$8.43	Date: 12/30/2014 11:06:00 PM		
#3 - CASH	<a href="#">Order #2</a>	Amount :\$5.78	Edit
Cashier: USER, DEMO	Station/Drawer: 1/1	Gratuity :\$0.00	Void
Tendered :\$5.78	Date: 12/30/2014 11:06:00 PM		
#4 - CASH	<a href="#">Order #5</a>	Amount :\$6.87	Edit
Cashier: USER, DEMO	Station/Drawer: 1/1	Gratuity :\$0.00	Void
Tendered :\$6.87	Date: 12/30/2014 11:06:00 PM		
#5 - CASH	<a href="#">Order #6</a>	Amount :\$5.45	Edit
Cashier: USER, DEMO	Station/Drawer: 1/1	Gratuity :\$0.00	Void

### Transactions Summary

If a mistake is made, the void transaction can be reversed by selecting the transaction in Back Office/Summary/Transactions Summary. Press the Edit button to view the transaction details or the Void button to immediately void the transaction and recalculate the order status.

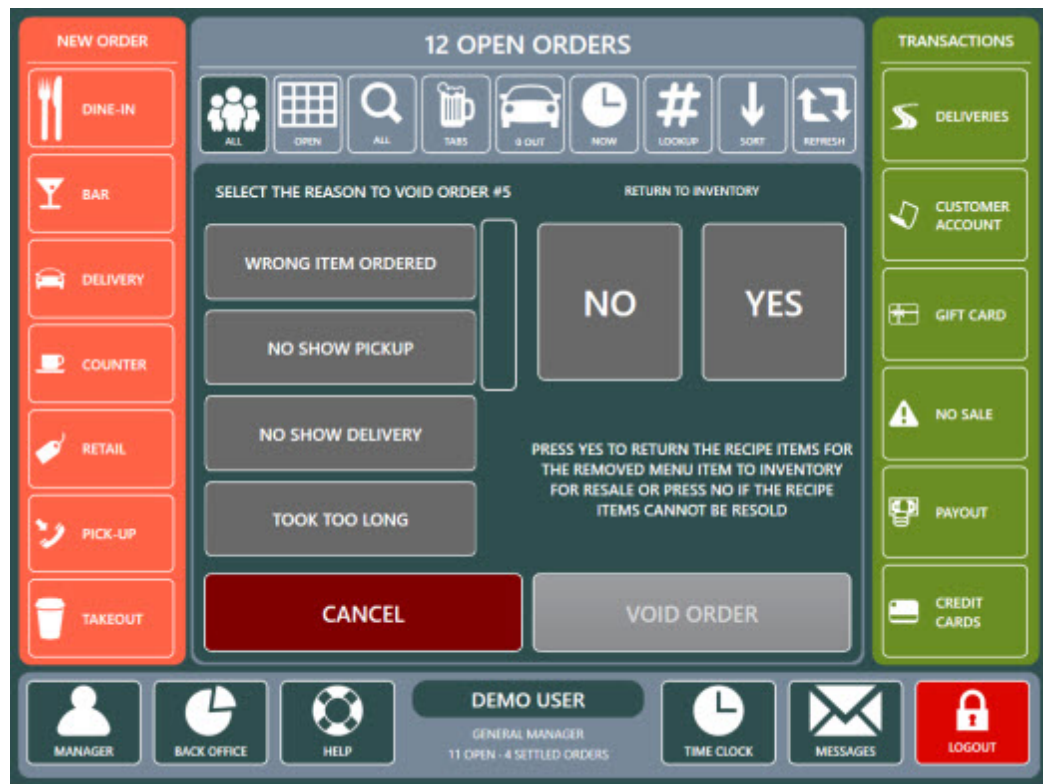
## 24.4 Void Order

If necessary, an order can be easily voided to remove it from the current business day orders. A user must have appropriate permissions to void an order. Log in, select the order and press the **Void** button. If the Void button is not visible or disabled, the logged in user does not have [void permission](#)<sup>[698]</sup>.



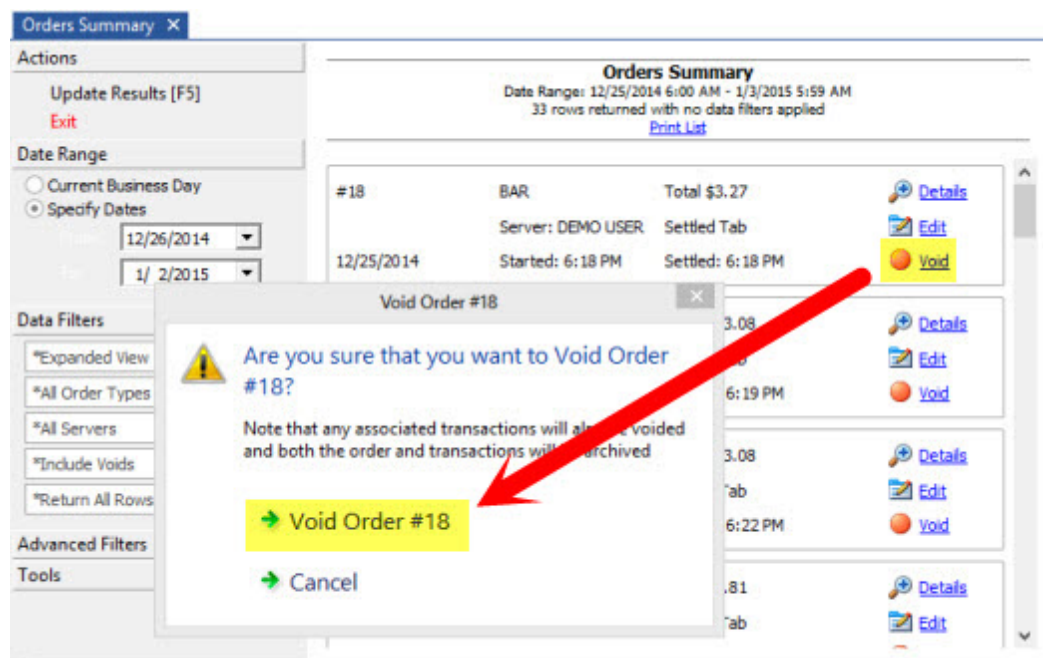
**Void Button**

Select the void reason to void the order and remove the order from the recall list.



### Void Order Confirmation

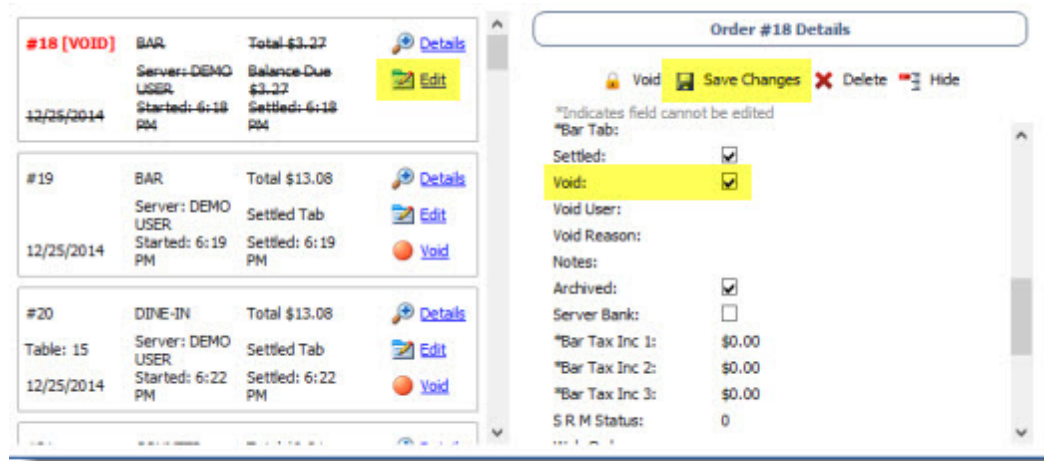
Select the **VOID REASON** and press the **VOID ORDER** button to void the order.



### Back Office Order Summary



Orders can also be voided in **Back Office>Summary>Orders** as shown above.



#### Undo Void In Back Office Order Details

To undo the void operation during the current business day, open Back Office/Summary/ Summary, select the order and click the Edit button to view the order details. Note that previously voided transactions are shown in strike through font and bold red text. Click Save Changes to update the database.

## 24.5 Split Order

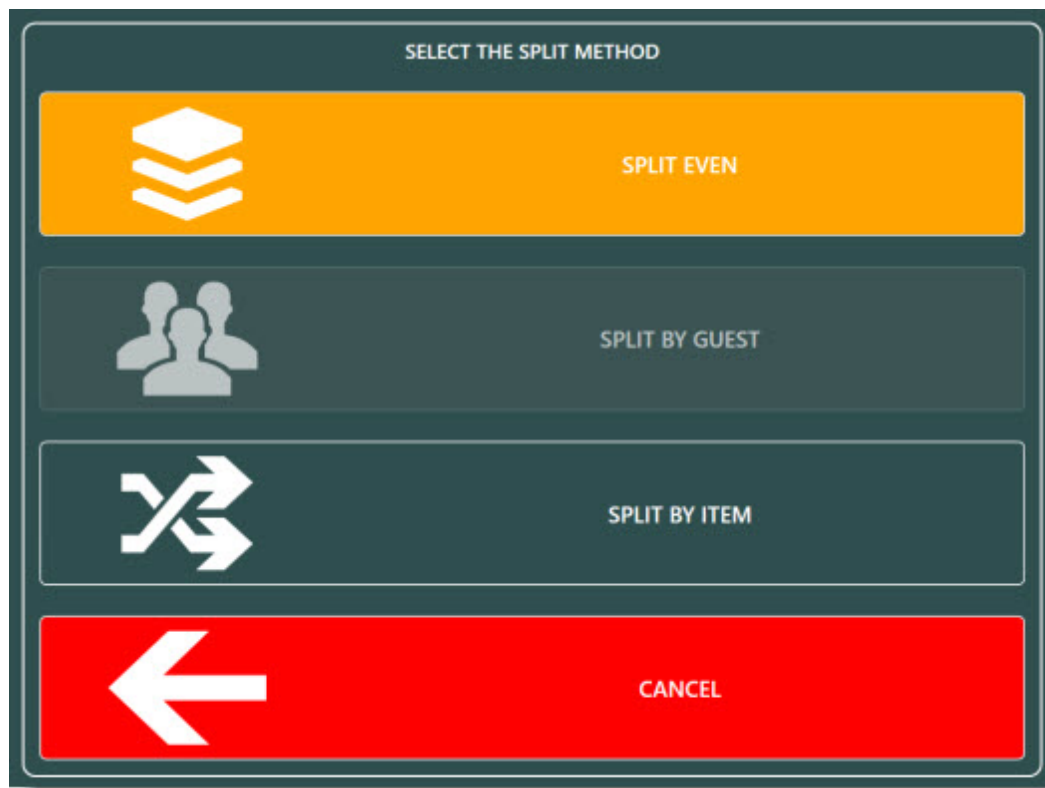
AmigoPOS includes the ability to split an order for customers that wish to pay separately. orders can be split by rearranging order items, split evenly or a separate order can be created for each customer if the [order type](#)<sup>967</sup> is set to use guest selection. When splitting an order evenly, the original order id is retained but new customer receipts are printed. The order is settled when the last customer has paid and the balance is zero. When splitting an order by guest, the original order is voided and new orders are created.

When splitting an order by rearranging order items or splitting by guest, any discounts are removed and must be reapplied.



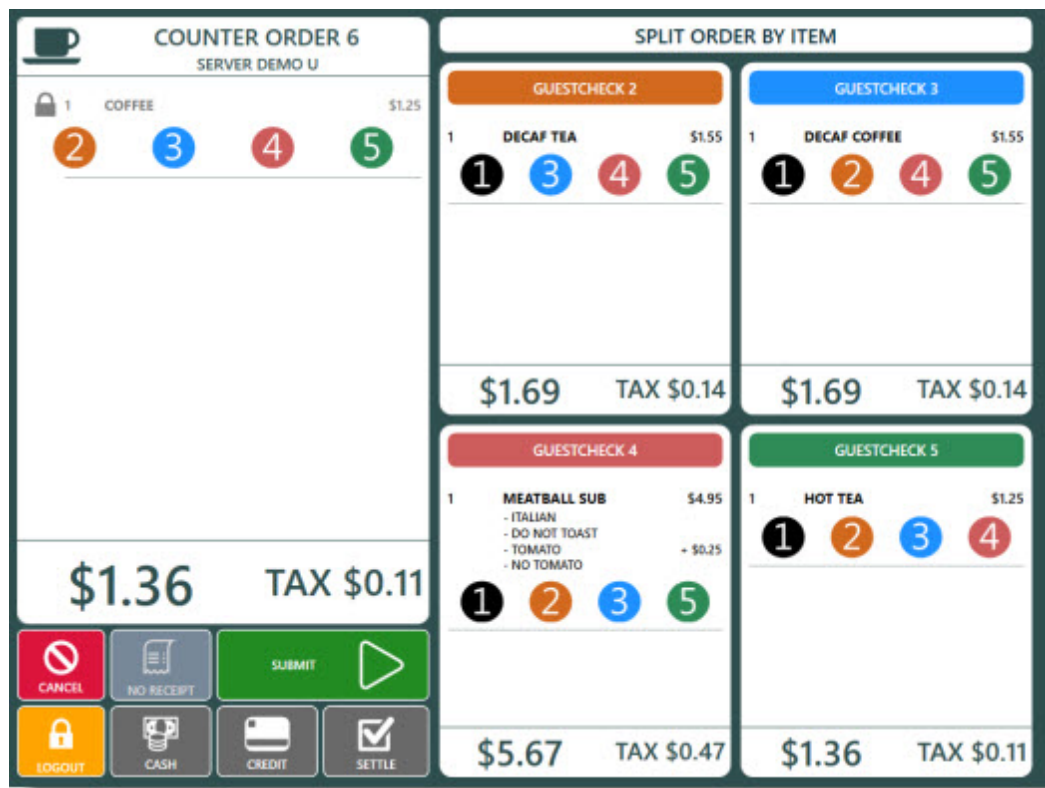
**Split Order Button**

Login and press the **Split** button under the **Open orders** button group on the start screen. Select the split method to continue. If the order [order type](#)<sup>967</sup> does not group items by guest, the **SPLIT BY GUEST** button is not available.



#### Split Method Selection

When splitting an order evenly, select the number of orders and press the **SPLIT** button. The order can be split a maximum of 20 times. If printed receipts are not required, toggle the printer button to the off position before splitting the order. Customer receipts can be printed later by selecting the order on the recall list and then pressing the **CUSTOMER RECEIPT** button.






Split By Item


When splitting an order by guest, a separate order is created for each guest.

- The order must have more than one active guest, the **SPLIT BY GUEST** button is disabled. Menu item guest assignment must be enabled for an order to have more than one active guest. See the [Order Types](#)<sup>[967]</sup> help topic for additional information.
- When splitting an order by guest, discounts may be split evenly between all guests or removed entirely so that the user can open the individual order on the order entry screen and reapply a discount. The button is enabled only if the order has discounts applied.
- The **UNDO SPLIT** button allows the user to reverse the split only while the **SPLIT order** screen remains open. After the screen has been closed, the split can no longer be reversed.
- If printed receipts are not required, toggle the printer button to the off position before splitting the order. orders can be printed at any time by pressing the **REPRINT** button on the start screen and selecting the order.
- Menu item guest assignments can be reassigned by selecting the item, pressing the **Quantity** button and pressing the **Next Guest** button at the bottom left. Continue pressing the **Next Guest** button until the correct guest is selected. This feature is useful when the order is split between groups of guests. For example, a party of 2 couples may require 2 orders. If the initial order was created using 4 separate guests, the server may assign all order items from Guest 2 to Guest 1 and all order items from Guest 4 to Guest 3. Then split the order normally to create 2 orders.

SELECT THE NUMBER OF TIMES TO SPLIT THE ORDER

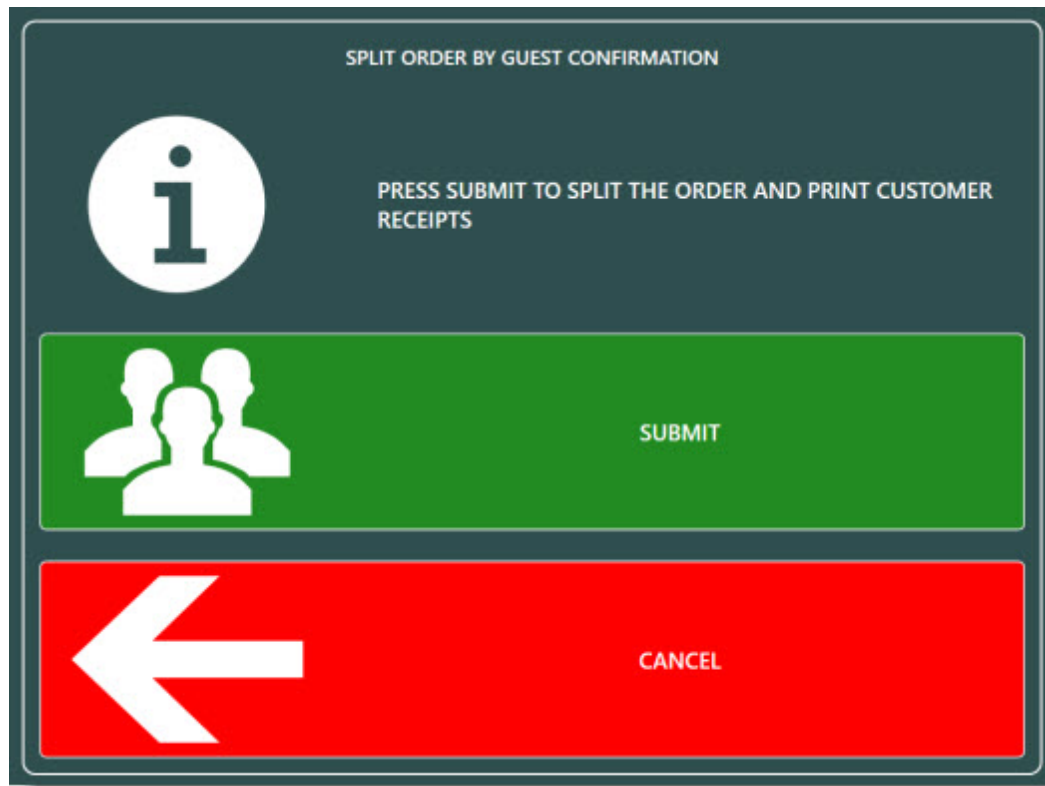
 2 

 SUBMIT

 CANCEL

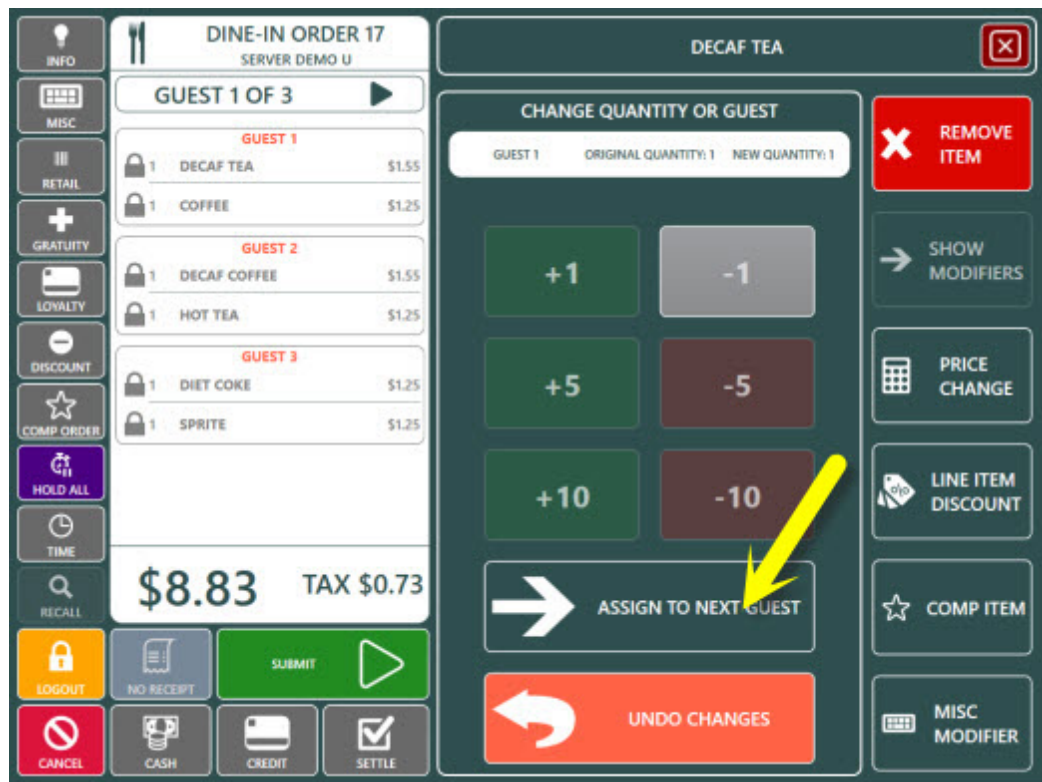
**Split Even**

The Split By Guest method creates an individual order and customer receipt for each guest.



### Split By Guest

Before splitting by guest, the items can be assigned to a different guest by recalling the order, selecting the item and pressing the Qty button. Press the Assign to Next Guest button until the item is assigned to the correct guest.



Assign Item to Different Guest

## 24.6 Combine Orders

AmigoPOS includes the ability to combine orders when a customer wishes to pay for multiple orders simultaneously. When orders are combined, the first order id is retained and the remaining orders are voided. Care should be taken when combining orders; the action cannot be reversed.



**Combine Orders Button**

To combine orders, login and press the **Combine** button on the start screen. Select the first order to combine. The order is opened next to an order list, allowing the user to select the additional orders.



COUNTER ORDER 16 SERVER DEMO U			SELECT THE ORDERS TO COMBINE	
1	DECAF TEA	\$1.55	<b>RETAIL 5</b> SERVER DEMO USER TOTAL \$3.82	<b>COUNTER 6</b> SERVER DEMO USER TOTAL \$11.77
1	COFFEE	\$1.25	<b>COUNTER 7</b> SERVER DEMO USER TOTAL \$4.74	<b>COUNTER 8</b> SERVER DEMO USER TOTAL \$10.63
1	DECAF COFFEE	\$1.55		<b>COUNTER 9</b> SERVER DEMO USER TOTAL \$17.66
1	HOT TEA	\$1.25	<b>COUNTER 10</b> SERVER DEMO USER TOTAL \$6.10	<b>BAR 12</b> SERVER DEMO USER TOTAL \$5.67
1	DECAF TEA	\$1.55		
1	COFFEE	\$1.25	<b>BAR 11</b> SERVER DEMO USER TOTAL \$6.54	<b>BAR 13</b> SERVER DEMO USER TOTAL \$6.54
1	DECAF COFFEE	\$1.55		
1	DECAF TEA	\$1.55	<b>BAR 12</b> SERVER DEMO USER TOTAL \$5.67	<b>DINE-IN 17</b> TABLE E TOTAL \$8.83
1	COFFEE	\$1.25		
1	DECAF COFFEE	\$1.55		
<b>\$23.49</b> TAX \$1.94				

Combine Orders Screen

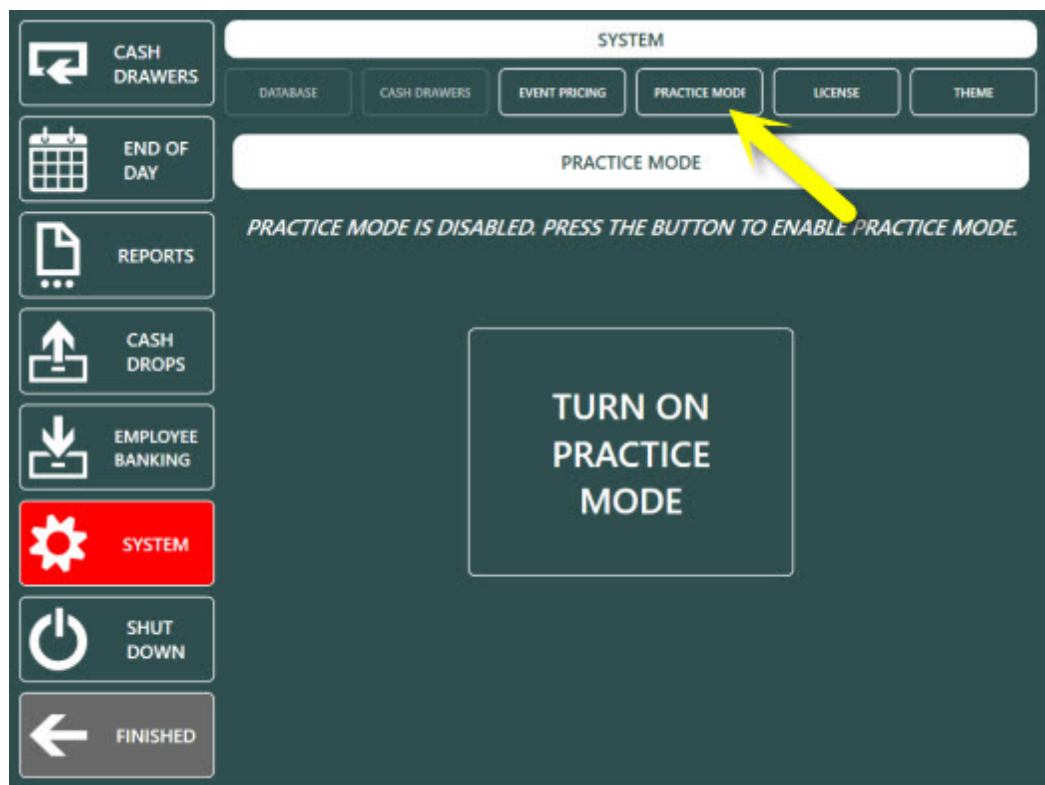
When all orders have been selected, press the **SUBMIT** button to combine the orders. All orders except the recalled order are automatically voided. A customer receipt will print only if the printer button to the **ON** position before combining the orders.

Part 25

# Practice Mode

## 25 Practice Mode

Practice mode is useful for training employees or testing new menus in AmigoPOS. Practice mode is enabled on the manager screen by pressing the **SYSTEM** and **PRACTICE MODE** buttons. Press the **TURN ON PRACTICE MODE** button to begin practice mode. Note that all orders and any program changes made while in practice mode will be lost. To exit practice mode, return to the manager screen and press the **END PRACTICE MODE** button or restart AmigoPOS.



Starting practice mode on the manager screen

Part 26

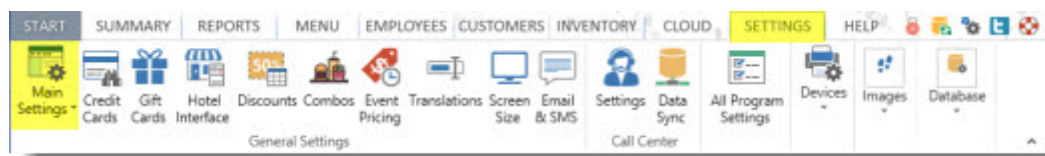
# Program Settings

## 26 Program Settings

### 26.1 Main Settings

#### 26.1.1 General Settings

AmigoPOS enables the system administrator to access most program settings in Back Office/Settings/Main Settings. Most settings are shared and are only entered once. Other settings, such as the **pos station ID**, are not shared and must be configured on each computer independently.



Back Office/Settings/ Main Settings

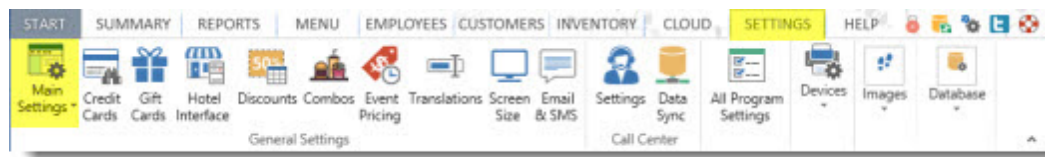
Pos Station Identifier	
STATION ID	1
Store Information	
Business Address	600 Biscayne Blvd
Business Address Line 2	
Business City	Miami
Business Fax	000-111-2222
Business Name	My Restaurant
Business Postal Code	33130
Business Region	FL
Business Telephone	111-222-3333
Location	1200
Business Day Start	06:00
Business Week Start Day	Monday

General Settings

The **General Settings** tab in Back Office/Settings/Main Settings contains information that identifies the business name and contact information as well as the local pos station id. The **Pos Station ID** must be unique on the network to allow proper cash drawer management and reporting. Note that AmigoPOS 8 retrieves the pos station id from the serial number.

#### 26.1.2 Tax Rates

The Tax Rates configuration screen enables the administrator to define tax rates and specify customer receipt tax rate printing preferences.



Back Office/Settings/ Main Settings

**Main Settings** x

General Settings

**Sales Tax**

☐ VAT Tax (tax is included in the price of all items)

Print tax line(s) on customer receipt: Don't Print

Print Item Tax Type on Retail Transactions Only

**SAVE CHANGES** (click to save changes)

Select the tax rate: Tax Rate 1 Description: Sales Tax Abbreviation: T1

Value	Alias	Minimum	Value	Alias	Minimum	Value	Alias	Minimum
0.09	TAX	0	0	-	0	0	-	0

Tax Rates Configuration

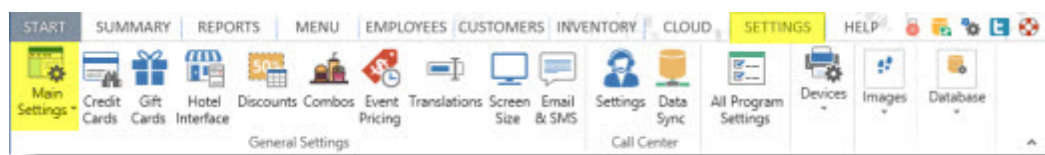
The **Tax Rates** tab in Back Office/Settings/Main Settings contains sales tax rate definitions. Review the [Sales Tax](#)<sup>1073</sup> help topic for additional information.

## 26.1.3 Order Entry

### 26.1.3.1 Order Entry Settings

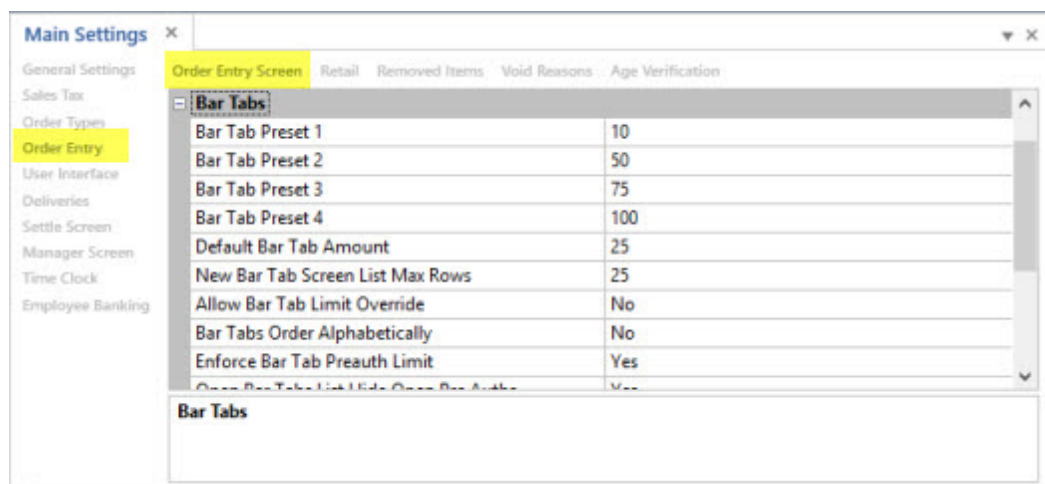
Order entry preferences determine the appearance and behavior of many order entry screen buttons. Most settings are shared by all pos stations on the network; settings marked with an asterisk must be configured on each pos station independently.

- [Bar Tabs](#)<sup>951</sup>
- [Discounts](#)<sup>952</sup>
- [Regular Menu](#)<sup>953</sup>
- [Loyalty Cards](#)<sup>953</sup>
- [Order Entry Buttons](#)<sup>954</sup>
- [Bar Menu Settings](#)<sup>955</sup>



Back Office/Settings/ Main Settings

#### Bar Tabs



### Bar Tab Settings

**Default Bar Tab Amount:** The default amount that new bar tabs are preauthorized for

**Allow Bar Tab Limit Override:** Set to Yes to allow the bartender to override the bar tab limit if adding a new item to the check will exceed the limit. Use of this setting is not recommended for preauthorized bar tabs.

**Bar Tabs Order Alphabetically:** Set to Yes to order bar tabs alphabetically by customer name on the recall screen. Set to No to order bar tabs by time entered

**Enforce Bar Tab PreAuth Limit:** Do not allow the bar tab to exceed the preauthorization amount

**Mandatory Bar Tab Seat Selection:** Force user to select a seat when starting a new bar tab

**New Bar Tab Screen List Default:** Set to Yes to display the list of previous bar tabs when the screen appears. Set to No to display the keyboard. The keyboard is displayed by default if no previous bar tabs exist.

**New Bar Tab Screen List Enabled:** Set to Yes to show the list of previous bar tab names and limits on the new bar tab screen

**New Bar Tab Screen List Force Amount:** Set to Yes to force the bartender to enter the amount after selecting a name from the list. Set to No to allow the bartender to use the previous limit.

**New Bar Tab Screen List Show Duplicates:** Set to Yes to include identical names on the bar tabs list

**New Bar Tab Screen List Show Only Multiple:** Set to Yes to include only names that appear more than once on the bar tab list (used to eliminate listing displaying customers)

**New Bar Tab Skip Confirmation:** Set to Yes to suppress the confirmation screen and immediately display the new bar tab screen after the New Bar Tab button is pressed. This setting is applied only if preauth bar tabs are not used.

**Open Bar Tabs List Hide Open PreAuths:** Set to Yes to hide bar tabs with open preauth transactions on the open bar tabs list if the balance due is zero. This setting is intended for users that do not use the bar tab preauth feature.

**Show Bar Tab Button:** Set to No to hide the NEW TAB and TABS buttons on the order entry screen

**Show Bar Tab Pre Auth Button:** Set to No to hide the bar tab Pre Authorize button on the order entry screen

### Discounts

The screenshot shows the 'Main Settings' window with the 'Order Entry Screen' tab selected. The 'Discounts' section is expanded, showing the following settings:

Setting	Value
Manual Discount Text	DISCOUNT
Line Item Discount Maximum Percentage	100
Discount Order Minimum Based On Subtotal Only	Yes
Line Item Discount Include Modifiers	Yes

Below the table, the 'Manual Discount Text' is defined as: 'Name to use when user enters a manual discount amount'.

### Discount Settings

**Manual Discount Text:** Name to use when user enters a manual discount amount

**Discount Order Minimum Based On Subtotal Only:** Set to No if the Subtotal + Tax should be used when calculating the minimum order amount before a discount is applied (has no effect for VAT tax users)

### Regular Menu

The screenshot shows the 'Main Settings' window with the 'Order Entry Screen' tab selected. The 'Regular Menu' section is expanded, showing the following settings:

Setting	Value
Display Modifiers Only If Mandatory	No
Order Menu Items Alphabetically	No
Regular Menu Allow Tax Included	Yes
Send Misc Items To Prep 1	Yes
Mandatory Beverage Category	DRINKS

Below the table, the 'Regular Menu' is defined as: 'Regular Menu'.

### Regular Menu Settings

**Display Modifiers Only If Mandatory:** Show modifiers only when mandatory modifier groups are assigned to the menu item

**Order Menu Items Alphabetically:** Order regular menu and retail items alphabetically on the order entry screen after pressing a category button

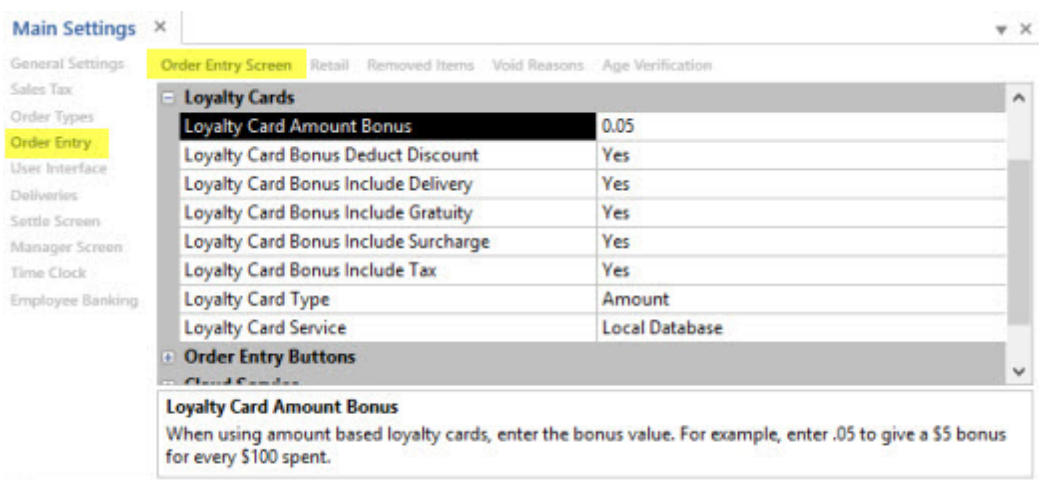
**Regular Menu Allow Tax Included:** Set to No to charge tax on regular menu items for order types that are configured to be tax inclusive

**Send Misc Items To Prep 1:** Set to Yes to send MISC items to prep printer or remote display 1 by default. A different destination can be selected on the MISC item entry screen.

**Mandatory Beverage Category:**

### Loyalty Cards





### Loyalty Card Settings

**Loyalty Card Amount Bonus:** When using amount based loyalty cards, enter the bonus value. For example, enter .05 to give a \$5 bonus for every \$100 spent.

**Loyalty Card Bonus Deduct Discount:** Set to Yes to deduct discounts before calculating the bonus amount for loyalty card purchases.

**Loyalty Card Bonus Include Delivery:** Set to Yes to include the delivery charge when calculating the bonus amount for loyalty card purchases.

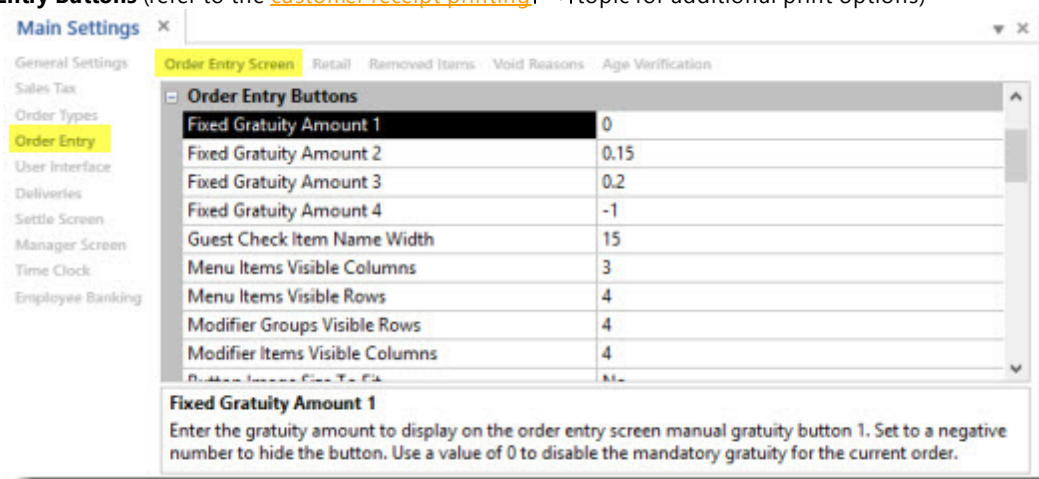
**Loyalty Card Bonus Include Gratuity:** Set to Yes to include the gratuity when calculating the bonus amount for loyalty card purchases.

**Loyalty Card Bonus Include Surcharge:** Set to Yes to include the surcharge when calculating the bonus amount for loyalty card purchases.

**Loyalty Card Bonus Include Tax:** Set to Yes to include tax when calculating the bonus amount for loyalty card purchases.

**Loyalty Card Type:** Select the method that loyalty card rewards are issued.

**Order Entry Buttons** (refer to the [customer receipt printing](#)<sup>[240]</sup> topic for additional print options)



### Order Entry Button Settings

**Fixed Gratuity Amount 1:** Enter the gratuity amount to display on the order entry screen manual gratuity button 1. Set to a negative number to hide the button. Use a value of 0 to disable the mandatory gratuity for the current order.

**Fixed Gratuity Amount 2:** Enter the gratuity amount to display on the order entry screen manual gratuity button 2. Set to a negative number to hide the button.

**Fixed Gratuity Amount 3:** Enter the gratuity amount to display on the order entry screen manual gratuity button 3. Set to a negative number to hide the button.

**Fixed Gratuity Amount 4:** Enter the gratuity amount to display on the order entry screen manual gratuity button 4. Set to a negative number to hide the button.

**Modifier Groups Visible Rows:** Select the number of visible order entry screen modifier group rows to display vertically

**Modifier Items Visible Columns:** Select the number of order entry screen modifier item buttons to display horizontally

**Order Entry Screen Cancel Button:** Set to No to hide the cancel button on the order entry screen.

**Order Entry Screen Cash Button:** Set to No to hide the cash button on the order entry screen.

**Order Entry Screen Change Table Button:** Set to No to hide the change table button on the order entry screen.

**Order Entry Screen Credit Button:** Set to No to hide the credit button on the order entry screen.

**Order Entry Screen Discount Button:** Set to No to hide the discount button on the order entry screen.

**Order Entry Screen Edit Customer Button:** Set to No to hide the edit customer button on the order entry screen.

**Order Entry Screen Gratuity Button:** Set to No to hide the gratuity button on the order entry screen.

**Order Entry Screen Hold All Button:** Set to No to hide the hold all button on the order entry screen.

**Order Entry Screen Info Button:** Set to No to hide the info button on the order entry screen.

**Order Entry Screen Logout Button:** Set to No to hide the logout button on the order entry screen.

**Order Entry Screen Loyalty Button:** Set to No to hide the loyalty button on the order entry screen.

**Order Entry Screen Misc Button:** Set to No to hide the misc button on the order entry screen.

**Order Entry Screen Recall Button:** Set to No to hide the recall button on the order entry screen.

**Order Entry Screen Retail Button:** Set to No to hide the retail button on the order entry screen.

**Order Entry Screen Settle Button:** Set to No to hide the settle button on the order entry screen.

**Order Entry Screen Submit Button:** Set to No to hide the submit button on the order entry screen.

**Order Entry Screen Time Button:** Set to No to hide the time button on the order entry screen.

**Order Entry Screen Transfer Button:** Set to No to hide the transfer button on the order entry screen.

**Print Receipt By Default\*:** Set to Yes to print a customer receipt each time the order is submitted at this pos station

**Pay Now Receipt:** Specify whether to print a customer receipt when the order is settled directly from the order entry screen

**Default Misc Item Tax Rate:**

**Menu Categories Visible Rows:** Select the number of order entry screen menu category buttons to display vertically

**Menu Items Visible Rows:** Select the number of visible order entry screen menu item buttons to display vertically

**Menu Items Visible Columns:** Select the number of order entry screen menu item buttons to display horizontally

## Bar Menu Settings

Bar Menu Settings	
Bar Menu Modifier Markup	4
Bar Menu Allow Tax Included	No
Bar Menu Enabled	Yes
Order Bar Menu Items Alphabetically	Yes
Order Bar Optionals Alphabetically	No
Remote Print Bar Upcharge Asterisk	Yes
*Station Located at Bar	No
*Hide Cash Tender Button	No
*Hide Recall Button	No
*Hide Add Button	No

## Bar Menu Settings

**Bar Menu Modifier Markup:** Enter a numeric value to use when calculating the suggested price on the inventory screen for bar menu modifiers

**Bar Menu Allow Tax Included:** Set to No to charge tax on bar menu items for order types that are configured to be tax inclusive

**Bar Menu Enabled:** Enable the bar menu on the order entry screen

**Order Bar Menu Items Alphabetically:** Set to No to use button position value to order bar menu items on the order entry screen

**Order Bar Optionals Alphabetically:** Set to No to use button position value to order bar modifiers and prep items on the order entry screen

**Remote Print Bar Upcharge Asterisk:** Set to Yes to print an asterisk before and after the upcharge description when sent to prep printer

**Terminal Located at Bar:** Set to Yes to disable printing prep tickets for bar menu items entered at this terminal

**Hide Cash Tender Button:** Set to Yes to disable bar menu (speed bar) cash tender button

**Hide Recall Button:** Set to Yes to disable bar menu (speed bar) recall button

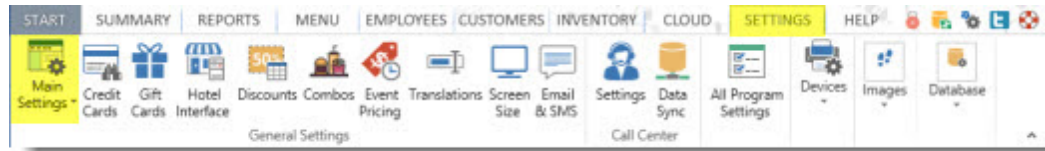
**Hide Add Round Button:** Set to Yes to disable bar menu (speed bar) add round button

**Hide Drink Recipes Button:** Set to Yes to disable bar menu drink recipes button

**Hide Shortcuts Button:** Set to Yes to disable bar menu shortcuts button

### 26.1.3.2 Removed Items

The **Removed Items** tab in Back Office/Settings/Main Settings/Order Entry contains the list of items that appears when an item is removed from an existing order on the order entry screen. The user is prompted to select the reason for the item removal only if the item has been previously submitted. Previously submitted items appear in **RED** text.

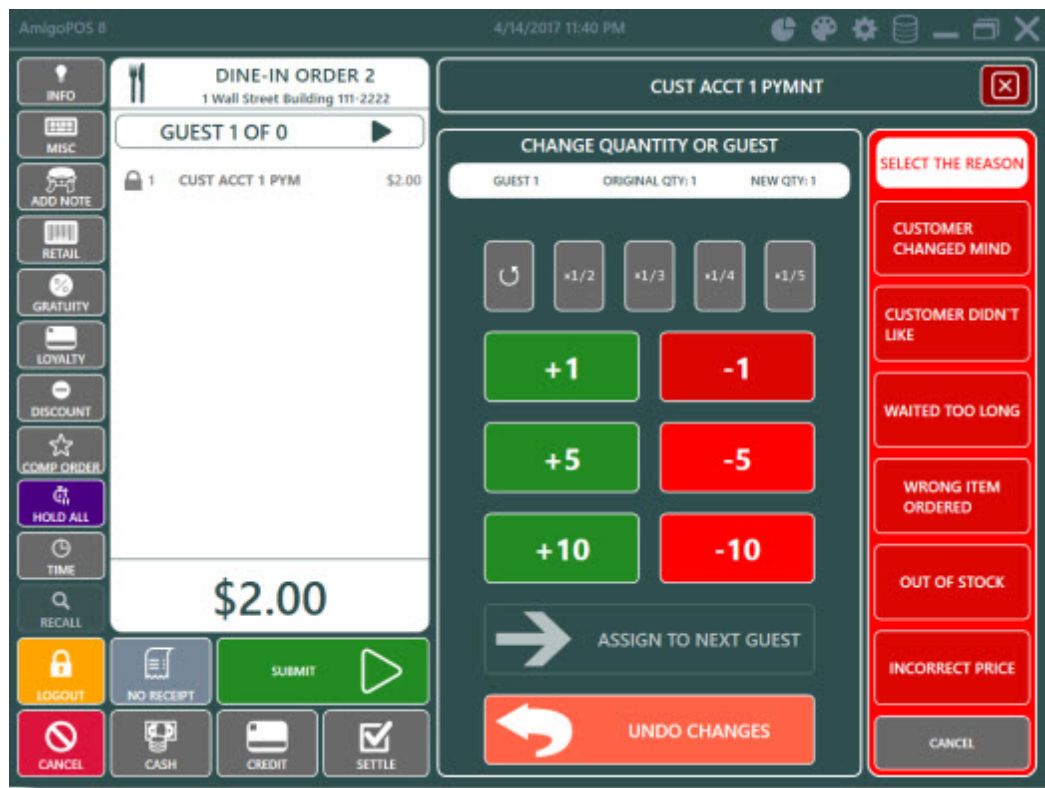


Back Office/Settings/ Main Settings

A message can be sent to remote printers whenever an order item is removed. Check the box next to **Send message to remote printers and or kitchen display after removing order items** to enable this feature.



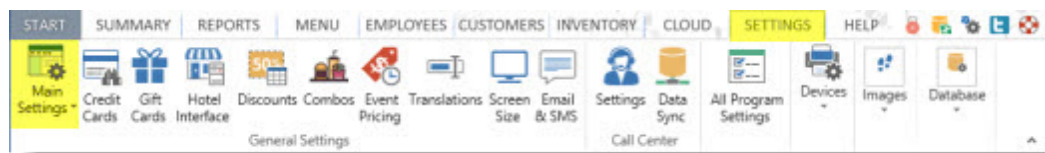
Removed Order Items Reasons



Remove Item Confirmation

### 26.1.3.3 Void Reasons

Void reasons appear on the main screen orders list when the void button is pressed.



Back Office/Settings/ Main Settings

The **Void Reasons** tab in Back Office/Settings/Main SettingsOrder Entry contains the list of items that appears when an order is voided. The user is prompted to select the reason for the void and the reason is recorded in the back office orders log.

**Main Settings** ×

General Settings Order Entry Screen Retail Removed Items **Void Reasons** Age Verification

Sales Tax  
Order Types  
**Order Entry**  
User Interface  
Deliveries  
Settle Screen  
Manager Screen  
Time Clock  
Employee Banking

	VOID REASON	BUTTON POSITION	HIDE BUTTON	
+	Click here to add a new row			
	WRONG ITEM ORDERED	1	<input type="checkbox"/>	✗
	NO SHOW PICKUP	2	<input type="checkbox"/>	✗
	NO SHOW DELIVERY	3	<input type="checkbox"/>	✗
	TOOK TOO LONG	4	<input type="checkbox"/>	✗
	CUSTOMER DIDN'T LIKE	5	<input type="checkbox"/>	✗
	MANAGER COMP	6	<input type="checkbox"/>	✗
	EMPLOYEE TRAINING	7	<input type="checkbox"/>	✗
	UNLISTED REASON	8	<input type="checkbox"/>	✗

Order Void Reasons

ALL OPEN ALL TABS 0 OUT NOW # LOOKUP SORT REFRESH

SELECT THE REASON TO VOID ORDER #2 RETURN TO INVENTORY

WRONG ITEM ORDERED

NO SHOW PICKUP

NO SHOW DELIVERY

TOOK TOO LONG

NO YES

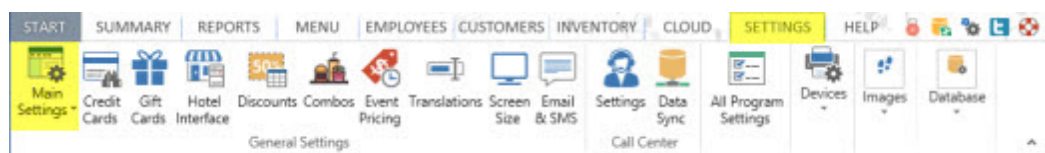
PRESS YES TO RETURN THE RECIPE ITEMS FOR THE REMOVED MENU ITEM TO INVENTORY FOR RESALE OR PRESS NO IF THE RECIPE ITEMS CANNOT BE RESOLD

CANCEL VOID ORDER

Void Order Confirmation

## 26.1.4 User Interface

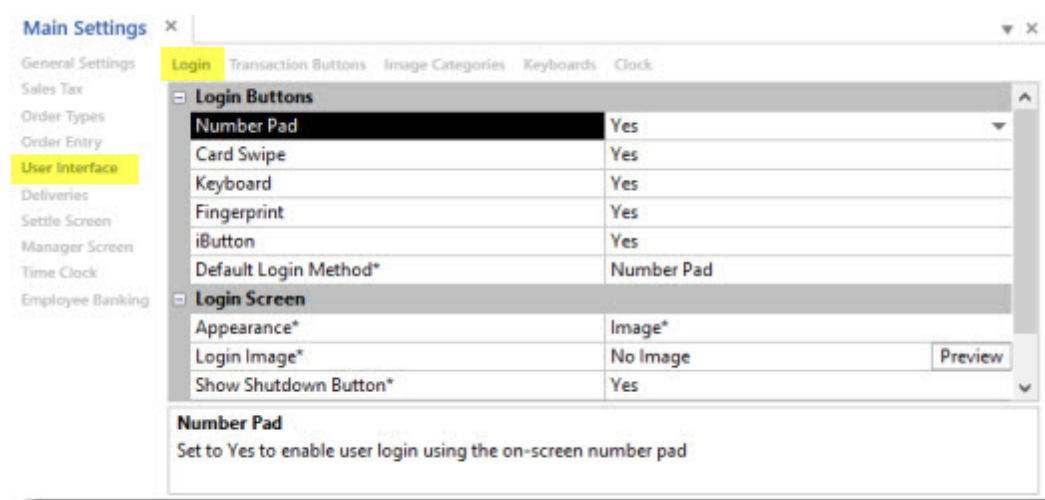
Many settings that control the appearance and visibility of buttons on the start screen are located in Back Office/Settings/Main Settings>User Interface. Most settings are shared by all pos stations on the network; settings marked with an asterisk must be configured on each pos station independently.



### Back Office/Settings/ Main Settings

The **User Login** tab in Back Office/Settings/Main SettingsUser Interface settings control the login types available when logging in to the front of house or back office. In addition, the following settings are available:

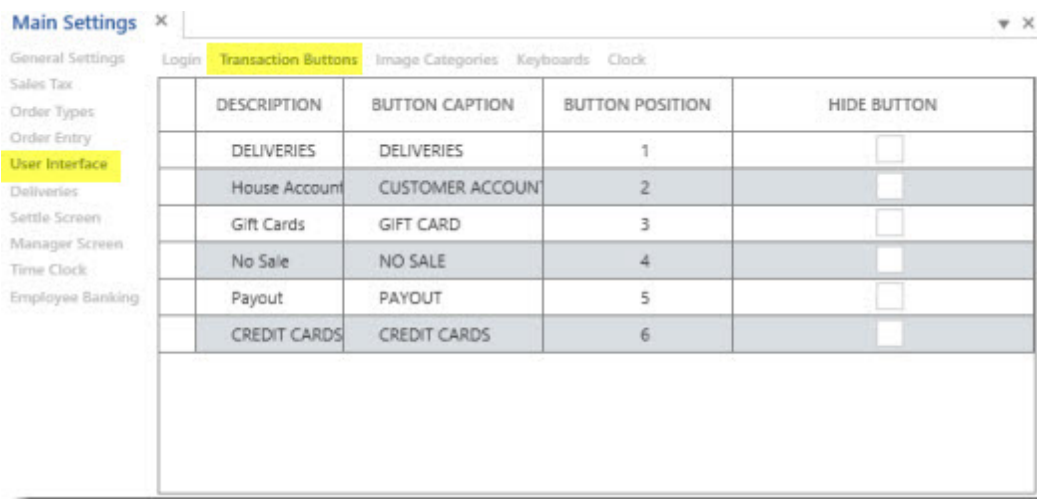
- Show/hide login methods
- Set default login method (for current pos station)
- Select image or html page to display on left side of login screen
- Specify whether to disable auto-logout
- Specify whether to show the shutdown button on the login screen



### Login Screen & User Login Settings

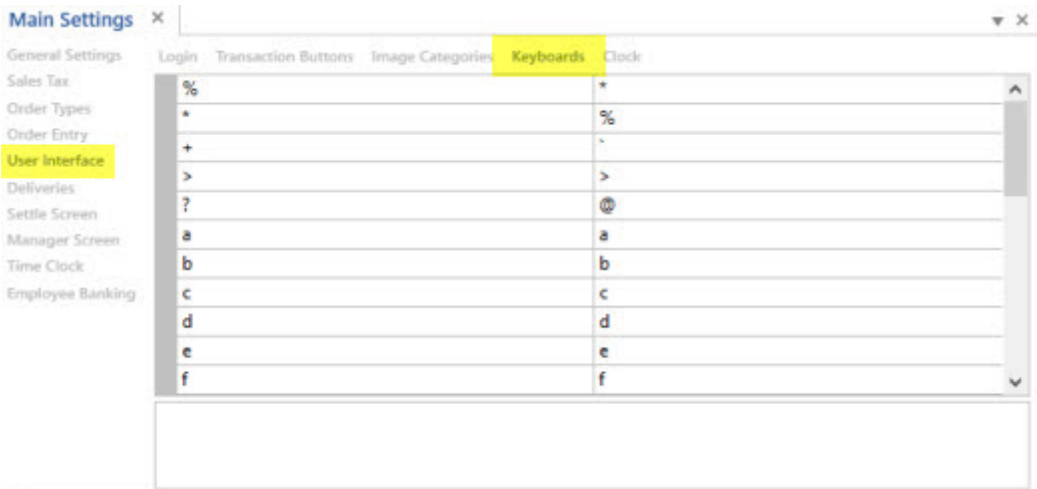
The **Transaction Buttons** tab in Back Office/Settings/Main SettingsUser Interface allows the user to customize the appearance of the buttons that appear under the **TRANSACTIONS** button group on the start screen. The buttons are used for performing transactions on existing orders.





Transaction Buttons Configuration

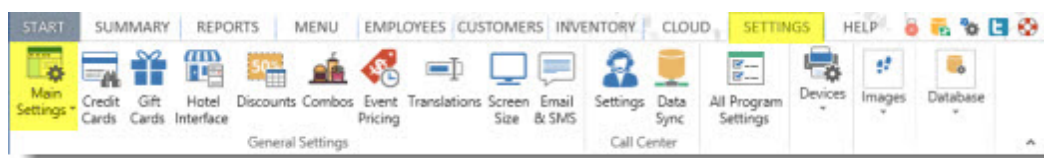
The **On-Screen Keyboards** tab in Back Office/Settings/Main Settings>User Interface allows the user to specify the characters to appear on the various screens that require keyboard entry.



On-Screen Keyboards Configuration

## 26.1.5 Deliveries

AmigoPOS includes the ability to track deliveries from the time the phone rings to the time that the driver returns. The following settings are used to configure driver routing, phone number entry, delivery alerts and delivery zones that appear on the customer information screen.



Back Office/Settings/ Main Settings

The screenshot shows the 'Main Settings' window with the 'General Settings' tab selected. The 'Deliveries' section is expanded, showing a list of settings:

Setting Name	Value
Customer Info User Defined Field 1 Label	FISCAL TAX ID
Customer Info User Defined Field 2 Label	ID CARD NUMBER
Customer Info User Defined Field 3 Label	COMMERCIAL TERMS
Default Customer City	New York
Default Customer Location Name	DEFAULT
Default Customer Postal Code	10001
Default Customer State	NY
Delivery Out Message	The driver is in route with your order
Delivery Out Subject	Order Update
Email SMS Trigger On Delivery Sent Out Message	Delivery Sent Out

### Delivery Settings

The **General Settings** tab in Back Office/Settings/Main Settings/Deliveries contains the following settings:

#### Driver Routing

- Reprint button default
- Hide Edit order button
- Disable check-in only button

#### Phone Number Format

- Verify phone number length
- Do not format phone number
- Phone length
- Group 1 length
- Group 2 length
- Group 3 length

#### Alerts

- Check time limits on driver routing and start screens
- Warning interval
- Late interval
- Beep alert

The screenshot shows the 'Main Settings' window with the 'General Settings' tab selected. The 'Delivery Zones' section is expanded, showing a table of delivery zones:

NAME	DESCRIPTION	BUTTON POSITION	CHARGE	FREE LIMIT	TAX RATE	HIDE BUTTON
+ Click here to add a new row						
North End	North	1	\$2.20	\$25.00	Non-Taxable (0)	<input type="checkbox"/>
Web Order	Default Web Order Delivery Zone	1	\$2.50	\$0.00	Non-Taxable (0)	<input type="checkbox"/>
Free Web Order	Default Free Web Order Delivery Zone	1	\$0.00	\$0.00	Non-Taxable (0)	<input type="checkbox"/>
Downtown	Downtown	2	\$2.75	\$0.00	Non-Taxable (0)	<input type="checkbox"/>
West Side	West	3	\$1.00	\$0.00	Non-Taxable (0)	<input type="checkbox"/>
No Charge	Free	4	\$0.00	\$0.00	Non-Taxable (0)	<input type="checkbox"/>

### Delivery Zones Configuration

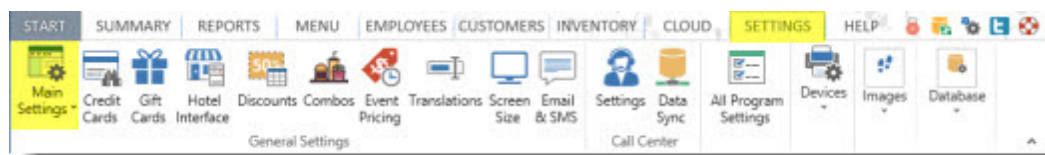


The **Delivery Zones** tab in Back Office/Settings/Main SettingsDeliveries contains the list of delivery zones that appears on the driver routing screen and the customer information screen. Each delivery zone definition contains the following settings:

- Zone name
- Zone Id
- Button position
- Zone description
- Zone charge
- Tax rate
- Disabled

## 26.1.6 Settle Screen

Most order transactions are processed order settlement screen. Other transactions, such as credit card transactions using integrated payment processing, are processing on a separate screen and are not affected by the settings described by this help topic.

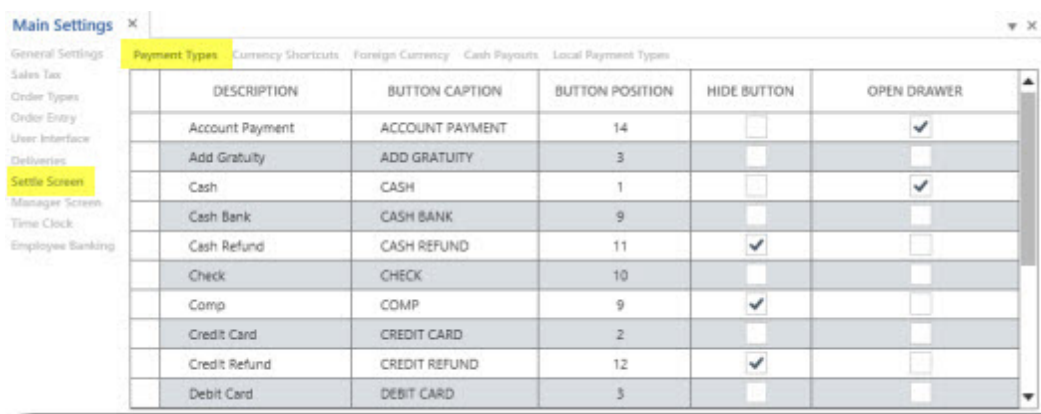


**Back Office/Settings/ Main Settings**

### Payment Methods

The Payment Types tab in Back Office/Settings/Main SettingsSettle Screen contains a list of transaction types available on the Settle screen. Each payment type definition contains the following settings:

- Transaction type: The text that appears on the transaction types list
- Button position: The button position relative to the button position value of other buttons
- Disable: Check the box to hide this transaction type
- Open Drawer: Check the box if the cash drawer should open when a transaction is completed using this transaction type (i.e. if the cashier is required to place the signature slip in the drawer after a Room Charge transaction, check the box under the Open Drawer column)
- Deduct: Check the box to deduct this transaction type from daily revenue reports
- Show bank check prompt: Check the box to prompt the user to enter the bank check number and amount when using this transaction type
- Show manual credit card prompt: Check the box to prompt the user to enter the credit card authorization code, transaction amount and gratuity amount when using this transaction type



DESCRIPTION	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON	OPEN DRAWER
Account Payment	ACCOUNT PAYMENT	14	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Add Gratuity	ADD GRATUITY	3	<input type="checkbox"/>	<input type="checkbox"/>
Cash	CASH	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cash Bank	CASH BANK	9	<input type="checkbox"/>	<input type="checkbox"/>
Cash Refund	CASH REFUND	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Check	CHECK	10	<input type="checkbox"/>	<input type="checkbox"/>
Comp	COMP	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Card	CREDIT CARD	2	<input type="checkbox"/>	<input type="checkbox"/>
Credit Refund	CREDIT REFUND	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Debit Card	DEBIT CARD	3	<input type="checkbox"/>	<input type="checkbox"/>

Payment Types Configuration

### Currency Presets

The **Currency Presets** tab in Back Office/Settings/Main SettingsSettle Screen contains the values that determine the amount and visibility of each of the 6 currency preset buttons that appear on the left side of the number pad when performing a cash transaction.



Currency Preset	Value
Currency Preset 1	1
Currency Preset 1 Enabled	Yes
Currency Preset 2	5
Currency Preset 2 Enabled	Yes
Currency Preset 3	10
Currency Preset 3 Enabled	Yes
Currency Preset 4	20
Currency Preset 4 Enabled	Yes
Currency Preset 5	50
Currency Preset 5 Enabled	Yes
Currency Preset 6	100

Currency Presets

### Foreign Currency

The Foreign Currency tab in Back Office/Settings/Main SettingsSettle Screen contains settings for foreign currencies that appear on the Settle screen.

<b>Main Settings</b> ×								
General Settings   Payment Types   Currency Shortcuts   <b>Foreign Currency</b>   Cash Payouts   Local Payment Types								
Sales Tax   Order Types   Order Entry   User Interface   Deliveries   <b>Settle Screen</b>   Manager Screen   Time Clock   Employee Banking								
	COUNTRY	NAME	SYMBOL	ABBREVIATION	EXCHANGE RATE	ENABLED	PRINT ON RECEIPT	
+ Click here to add a new row								
	AUSTRALIA	Dollar	\$	AUD	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
	CANADA	Dollar	\$	CND	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
	CHINA	Yuan	¥	YUN	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	EURO ZONE	Eur	€	EUR	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	FRANCE	Franc	₣	FRF	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	ISRAEL	Sheqel	₪	SHK	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	JAPAN	Yen	¥	YEN	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	KOREA	Won	₩	WON	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗
	QATAR	Rial	ر.ق	RIA	1.00	<input type="checkbox"/>	<input type="checkbox"/>	✗

Foreign Currency Settings

**Paid Out Reasons**

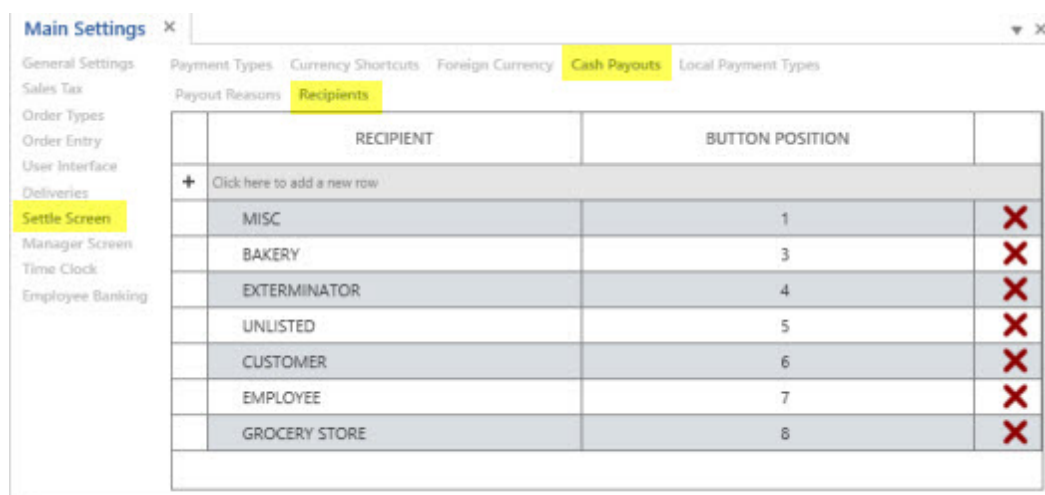
The **Paid Out Reasons** tab in Back Office/Settings/Main SettingsSettle Screen contains the list of paid out reasons that appears on the drop-down list on the Paid Out screen.

<b>Main Settings</b> ×			
General Settings   Payment Types   Currency Shortcuts   Foreign Currency   <b>Cash Payouts</b>   Local Payment Types			
Sales Tax   Order Types   Order Entry   User Interface   Deliveries   <b>Settle Screen</b>   Manager Screen   Time Clock   Employee Banking			
<b>Payout Reasons</b>   Recipients			
	PAYOUT REASON	BUTTON POSITION	
+ Click here to add a new row			
	SERVICE RENDERED	1	✗
	PRODUCT DELIVERY	2	✗
	DRIVER DELIVERY	2	✗
	REFUND	3	✗
	PAY ADVANCE	4	✗

Cash Payout Reasons

**Payout Recipients**

The Payout Recipients tab in Back Office/Settings/Main SettingsSettle Screen contains the list of paid out recipients that appears on the drop-down list on the Paid Out screen.



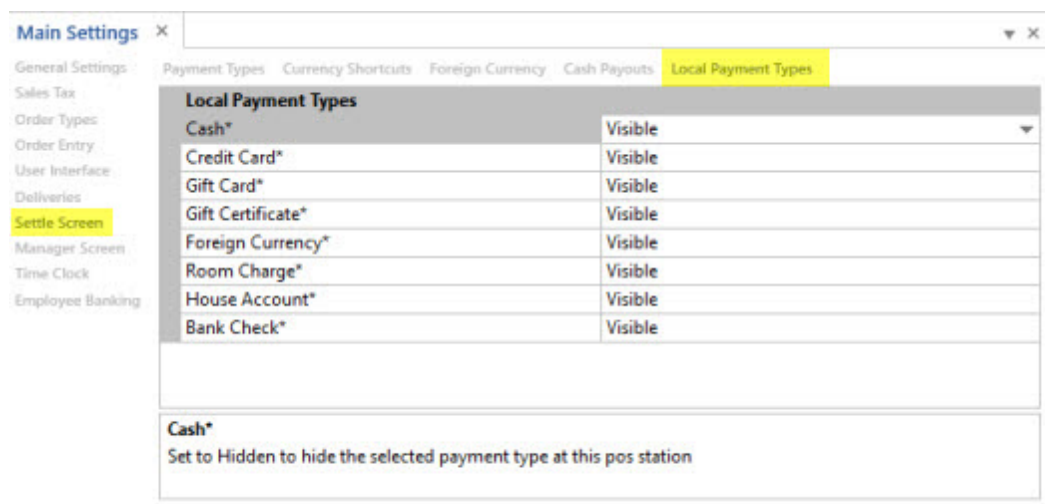
The screenshot shows the 'Main Settings' window with the 'Cash Payouts' tab selected. Under 'Payout Reasons', the 'Recipients' sub-tab is active. A table lists various recipients with their corresponding button positions and a status indicator (a red 'X' in a box).

	RECIPIENT	BUTTON POSITION	
+	Click here to add a new row		
	MISC	1	X
	BAKERY	3	X
	EXTERMINATOR	4	X
	UNLISTED	5	X
	CUSTOMER	6	X
	EMPLOYEE	7	X
	GROCERY STORE	8	X

Cash Payout Recipients

### Local Payment Types

The shared payment type settings can be overridden for the local pos station by setting the value to Hidden. Note that setting the CASH or CREDIT payment type to Hidden will hide the buttons on the settle screen and below the screen ticket on the order entry screen.



The screenshot shows the 'Main Settings' window with the 'Local Payment Types' tab selected. A table lists various payment types and their visibility status (Visible or Hidden).

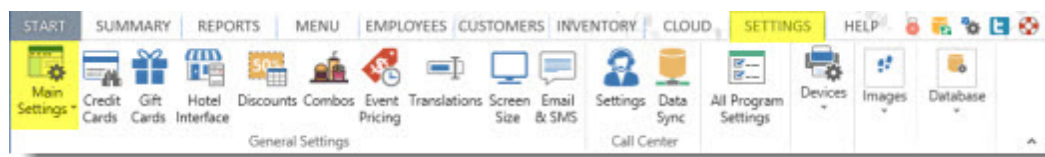
Local Payment Types	
Cash*	Visible
Credit Card*	Visible
Gift Card*	Visible
Gift Certificate*	Visible
Foreign Currency*	Visible
Room Charge*	Visible
House Account*	Visible
Bank Check*	Visible

**Cash\***  
Set to Hidden to hide the selected payment type at this pos station

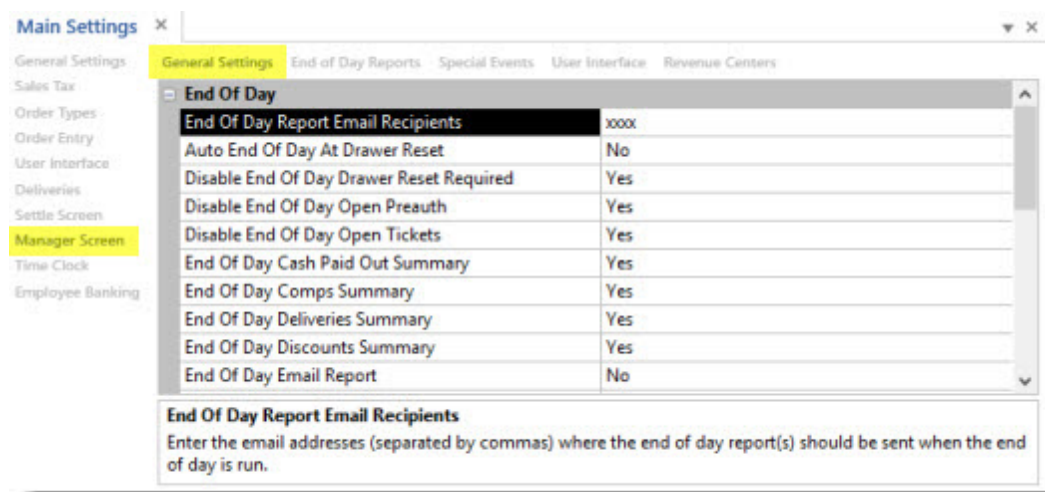
Override Payment Types

## 26.1.7 Manager Screen

Many daily functions such as Drawer Reset and End of Day are available on the manager screen. Settings such as drawer reset preferences and automatic printing of End of Day reports can be customized in Back Office/Settings/Main Settings by clicking on the **MANAGER SCREEN** tab. The settings are shared by all pos stations on the network. Review the [Cash Drawers](#) <sup>[640]</sup> and [End of Day](#) <sup>[643]</sup> help topics for additional information.




Back Office/Settings/ Main Settings



End of Day and Drawer Reset Preferences

Various End of Day settings can be customized in Back Office/Settings/Main Settings by clicking on the **MANAGER SCREEN** tab. The database must be synchronized to apply any changes. The following settings are available under the **General Settings** tab:

- **Show End Of Day Event Weather:** Prompt the user to specify the weather and any special events when the End Of Day is run
- **Suppress Print End Of Day Report:** Do not print report when End Of Day is run
- **Disable End of Day Open orders:** Do not allow the End Of Day procedure when open orders exist
- **End of Day Transactions Summary:** Show transactions summary on End Of Day report
- **End of Day Order Type Summary:** Show sales by order type summary on End Of Day report
- **End of Day Server Sales Summary:** Show sales by server summary on End Of Day report
- **End of Day pos station Sales Summary:** Show pos station sales summary on End Of Day report
- **End of Day Deliveries Summary:** Show deliveries summary on End Of Day report
- **End of Day Cash Paid Out Summary:** Show cash paid out summary on End Of Day report
- **End of Day Refunds Summary:** Show refunds summary on End Of Day report
- **End of Day Removed Items Summary:** Show removed items summary on End Of Day report
- **End of Day Subtotal By Item Type Summary:** Show subtotal by menu type summary on End Of Day report
- **End of Day Tax Collected:** Show tax collected summary on End Of Day report
- **Disable End of Day Open PreAuth:** Do not allow the End Of Day procedure when open pre-authorized (but not captured) transactions exist.
- **Exclude Bartenders From Bar Sales Report:** When displaying the **Bar Sales by Server** report, do not include bartenders on the list.
- **Include Tax In Bar Sales Report:** When displaying the **Bar Sales by Server** report, do not include tax when calculating totals
- **Show End of Day Confirmation Screen:** When the user press the **Confirm End Of Day** button, show another confirmation screen before the End of Day is run

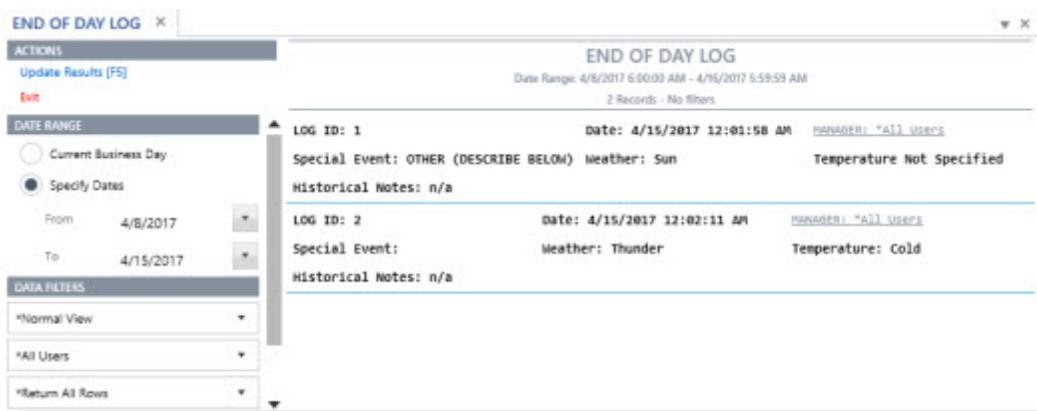


REPORT NAME	BUTTON POSITION	AUTO PRINT	HIDE BUTTON
BAR ITEM SALES REPORT	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CREDIT CARD TOTALS	1	<input type="checkbox"/>	<input type="checkbox"/>
CREDIT CARD TIPS REPORT	2	<input type="checkbox"/>	<input type="checkbox"/>
CREDIT CARD TRANSACTIONS	3	<input type="checkbox"/>	<input type="checkbox"/>
INVENTORY USAGE	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ITEM SALES REPORT	6	<input type="checkbox"/>	<input type="checkbox"/>
LOW INVENTORY (ESTIMATE)	8	<input type="checkbox"/>	<input type="checkbox"/>
NON CASH TIPS DETAIL	9	<input type="checkbox"/>	<input type="checkbox"/>
NON CASH TIPS REPORT	10	<input type="checkbox"/>	<input type="checkbox"/>
OPEN PREAUTH REPORT	11	<input type="checkbox"/>	<input type="checkbox"/>

### End of Day Mini Reports

The End Of Day reports list can be customized in Back Office/Settings/Main Settings by clicking on the **MANAGER SCREEN** tab. The database must be synchronized to apply any changes. The following settings are available for each report under the **End of Day Reports** tab:

- **Report Name:** The text that appears on the report button
- **Button position:** The position of the report button relative to the button position of other report buttons
- **Auto-Print End Of Day:** Set to True to print this report automatically when the End Of Day procedure is performed
- **Disable:** Hide this report



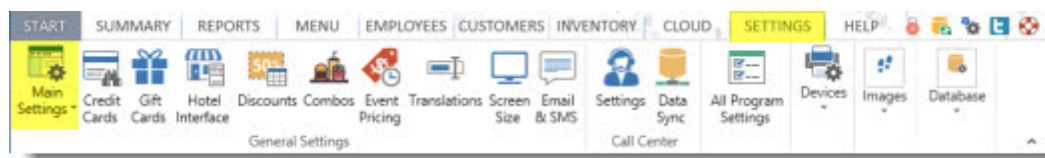
LOG ID	Date	Special Event	Weather	Temperature
LOG ID: 1	4/15/2017 12:01:58 AM	OTHER (DESCRIBE BELOW)	Sun	Temperature Not Specified
LOG ID: 2	4/15/2017 12:02:11 AM		Thunder	Cold

### End of Day History

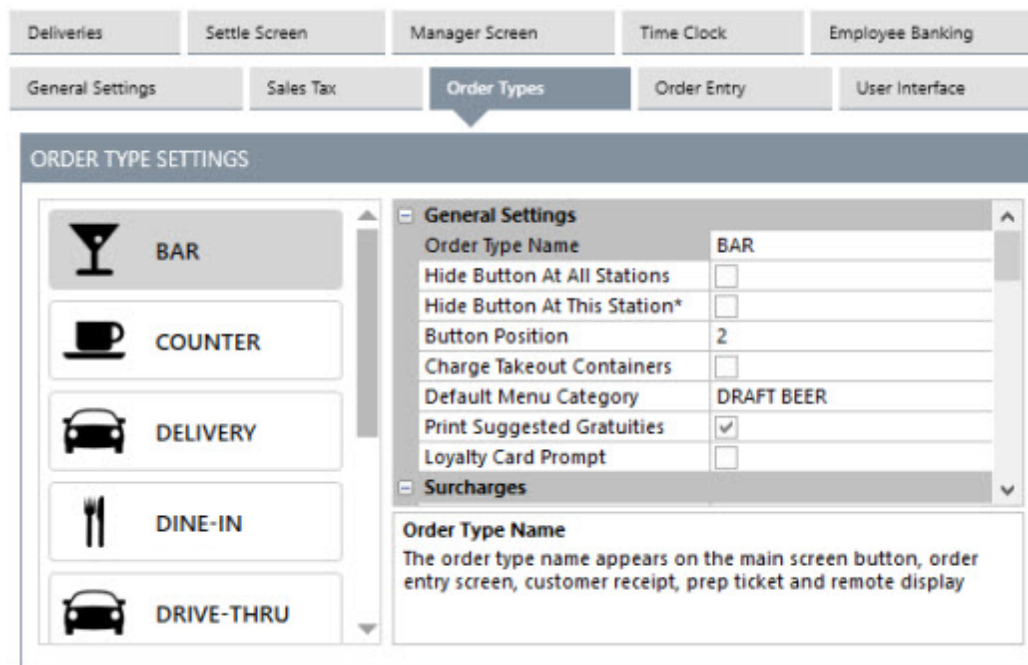
## 26.2 Order Types

### 26.2.1 General Settings

AmigoPOScan accommodate all business types through the use of pre-defined order types that can be customized as needed. Each order type corresponds to a button in the order types button group on the main screen, as shown below. Settings for each order type are configured in Back Office/Settings/Main Settings. The settings are shared by all pos stations on the network and a [database update](#) is required after changing the settings.



Back Office/Settings/ Main Settings



Back Office Order Types Settings

Order type buttons appear on the main screen in the order defined by the **Button Position** setting, described below. Up to 6 order types are shown at one time. Press the arrow to view additional order types.

#### General Settings

- **Order Type Name:** The order type name appears on the main screen button, order entry screen, customer receipt, prep ticket and remote display
- **Hide Button:** If this setting is enabled, the order type will not appear on the main screen and will not be available on the order entry screen
- **Button Position:** This value determines the order in which the order type will appear on the main screen.
- **Charge Takeout Containers:** Charge for takeout containers. The container charge is set for each menu item in the Container Charge field.
- **Default Menu Category:** Select the menu category that appears on the order entry screen immediately after an order with this order type is started or recalled
- **Print Suggested Gratuities:** When this value is set to True, you can specify up to 5 suggested gratuities to print at the bottom of the order.
- **Loyalty Card Prompt:** Show the loyalty card prompt immediately after the order type is selected

#### Surcharges

- **Surcharge Text:** The text that prints on the surcharge order line item
- **Surcharge Type:** If surcharges are used, select either Percentage or Fixed to determine the surcharge method.

- **Surcharge Amount:** When using the Percentage surcharge type, enter a decimal value; when using Fixed surcharges enter a dollar amount.
- **Surcharge Tax Rate:** Select the tax rate to apply to the surcharge

### Mandatory Gratuity

- **Mandatory Gratuity:** Set this value to True to automatically add a mandatory gratuity to the order.
- **Minimum Guests For Gratuity:** Specify the minimum number of guests before the mandatory gratuity is added.
- **Gratuity Amount:** Enter the mandatory gratuity amount as a percentage
- **Include Tax In Gratuity Calculation:** Specify whether the mandatory gratuity is calculated on the subtotal or on the total. This setting has no effect in VAT -inclusive tax environments.
- **Exclude Discount From Mandatory Gratuity:** Specify whether the mandatory gratuity should be based on the subtotal before or after the discount is applied

### Customer Receipt

- **Print Order Type On Top:** If the box is checked, the order type will be printed in block letters at the top of the order.
- **Print Order Type On Bottom:** If the box is checked, the order type will be printed in block letters at the bottom of the order.
- **Print 3-Digit Order Number At Bottom:** Set to Yes to print a large 3-digit order number at the bottom of the prep ticket and customer receipt. For example, Order Number 12345 will appear as ORDER 345. This setting applies to both the customer receipt and prep ticket.
- **Print Ticket Item Count:** Set to True to print the total number of items (excluding optionals) at the bottom of the order
- **Auto Print Receipt:** Automatically print receipt each time a transaction is completed on an order started with this order type

### Label Printers

- **Print Labels:** If the box is checked, any items added to an order with the order type will be sent to label printers when the order is submitted.

### Order Entry

- **Force Beverage Selection:** (reserved for future use) If the box is checked, the user will be required to enter a drink for each guest before the order can be submitted
- **Stay On Order Entry Screen:** If the box is checked, the user will remain on the order entry screen after the order is submitted, or return to the order entry screen after the order is settled using the Cash, Credit or Settle buttons. This feature is useful for retail establishments, fast food restaurants or other businesses where the customer orders at the counter.
- **Show Seating Chart:** If the box is checked, the user will be prompted to select a table immediately after the order type button is pressed on the main screen.
- **Guest Assignment Enabled:** If the box is checked, each order item is assigned to the selected guest. This feature is useful for fine dining restaurants where multiple servers may deliver items to a single table. Both the customer receipt and prep ticket group items by guest. This feature must be enabled to allow the user to create separate orders for each guest. See the Split order topic for additional details.
- **Enter Number Of Guests:** If the box is checked, the server is prompted to enter the number of guests after the table is selected on the seating chart
- **Show Customer Info:** If the box is checked, user will be prompted to enter the customer's address immediately after the order type is selected.
- **Show Delivery Zones:** If the box is checked, user will be prompted to enter the customer phone number immediately after the order type is selected.
- **Show Phone Number:** If the box is checked, user will be prompted to enter the customer phone number using the on-screen number pad after the order type is selected. This feature can be disabled if using a keyboard. Note that all transactions that require saving customer details must have a phone number assigned.
- **Show Customer Name Prompt:** Show the customer name prompt after the order is submitted. The customer name prints at the top of the order (useful for counter/fast food/quick serve)

### Sales Tax



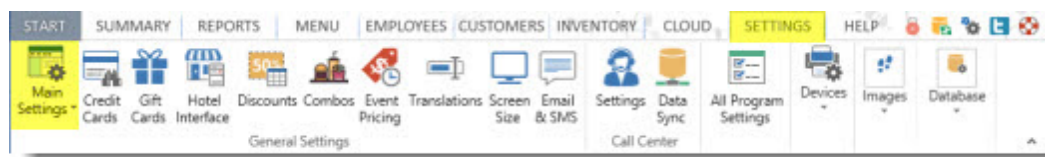
- **Bar Menu Tax Included:** Bar menu items have tax included (for restaurants that collect sales tax on bar menu items ordered in the dining area but do not charge sales tax on items ordered at the bar)
- **Non Taxable:** Set the entire order to be tax-exempt
- **Tax Inclusive:** Set to Yes if this order type is tax inclusive

### Remote Display

- **Remote Display Background Color:** Color to use in the order info header on the remote display monitors and the order information window on the order entry screen
- **Remote Display Text Color:** Color to use in the order info header on the remote display monitors and the order information window on the order entry screen

## 26.2.2 Mandatory Gratuity

AmigoPOS includes the ability to add a gratuity to any order based on [order type](#)<sup>967</sup> and the number of guests. For example, **Room Service** orders may require a 20% gratuity for any order, while **Dine In** orders may require a gratuity of 15% for parties of 6 or more.

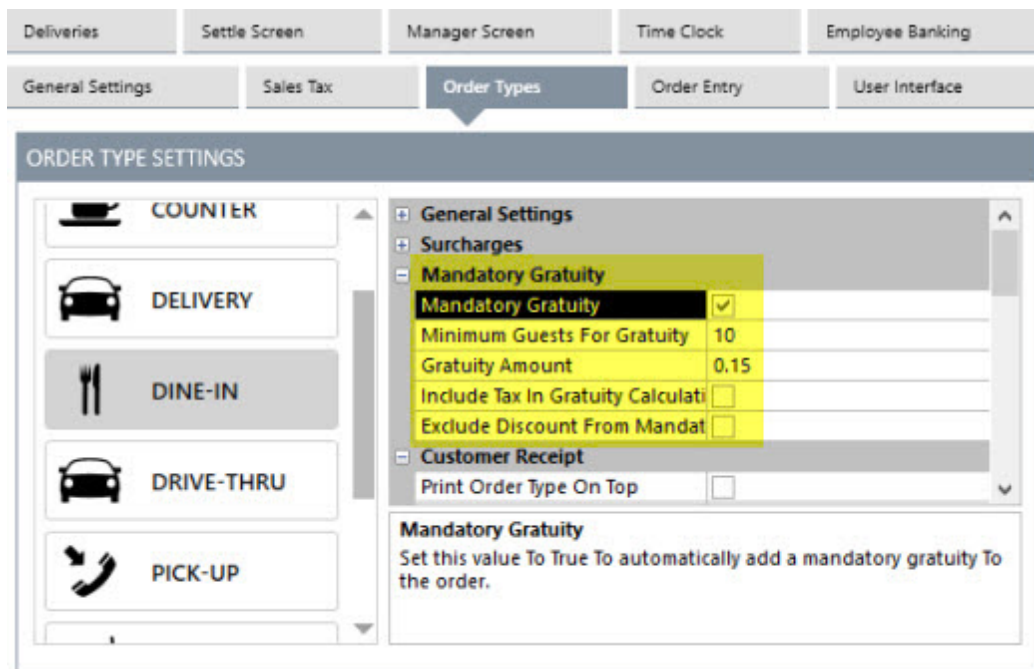


**Back Office/Settings/ Main Settings**

To enable mandatory gratuities for a specific order type, open Back Office/Settings/Main Settings and click the Order Types tab. Select the order type and change the value of **Mandatory Gratuity** to **Yes**. Enter the gratuity amount in decimal form, i.e. 0.15 for 15%, enter the minimum number of guests required for the gratuity to apply and specify whether the tax or discount should be included in the order calculation. Click Enter on the keyboard or change rows to update the database.

### Mandatory Gratuity

- **Mandatory Gratuity:** Set this value to True to automatically add a mandatory gratuity to the order.
- **Minimum Guests For Gratuity:** Specify the minimum number of guests before the mandatory gratuity is added.
- **Gratuity Amount:** Enter the mandatory gratuity amount as a percentage
- **Include Tax In Gratuity Calculation:** Specify whether the mandatory gratuity is calculated on the subtotal or on the total. This setting has no effect in VAT -inclusive tax environments.
- **Exclude Discount From Mandatory Gratuity:** Specify whether the mandatory gratuity should be based on the subtotal before or after the discount is applied



Mandatory Gratuity Settings

## 26.3 SMS

Customers can receive order updates on any mobile phone with instant messaging capability directly from AmigoPOS using the inexpensive [Twilio](#) messaging service. Customers can also receive an SMS directly from the customer information screen before the order has been entered. Refer to the steps below to configure AmigoPOS to work with Twilio after signing up for the Twilio service and obtaining a phone number from Twilio.

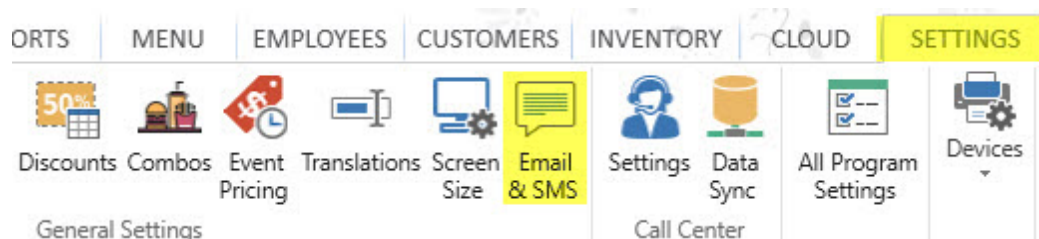
- [Twilio Subscription](#) <sup>971</sup>
- [Back Office Settings](#) <sup>971</sup>
- [Sending An SMS](#) <sup>973</sup>

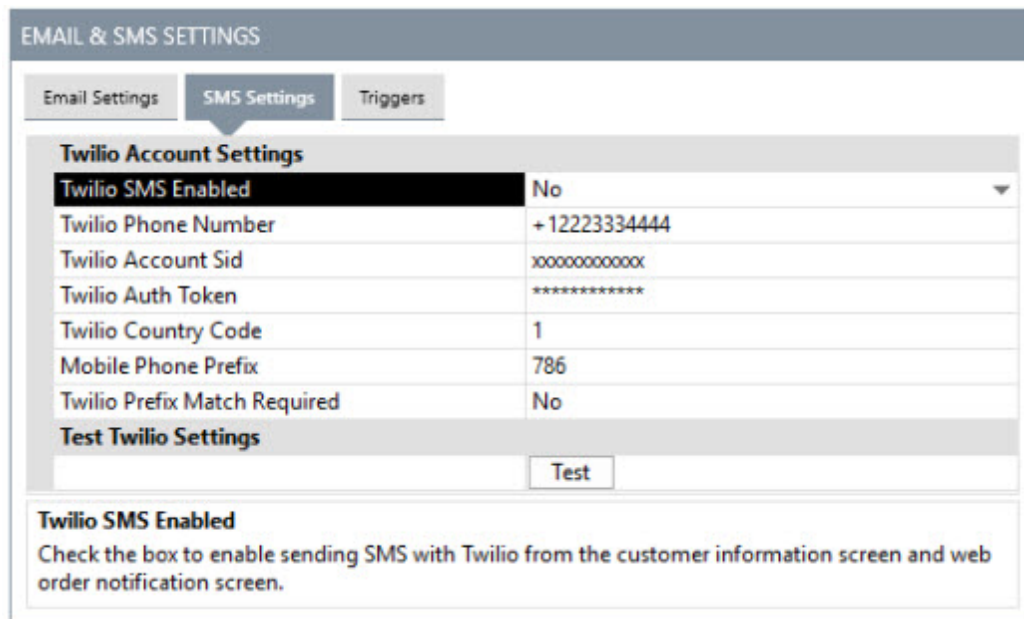
### Twilio Subscription

Visit the Twilio web site to sign up for a subscription to the messaging service. Note that a new phone number is required (typically at a cost of \$1 per month). In countries where a new Twilio phone number is not available, obtaining a Twilio phone number with an area code in the U.S. or Canada will allow you to send instant messages internationally, so that most countries are supported, even when a local phone number is not available.

### Back Office Settings

The following settings are available in **Back Office>Settings>Email & SMS**. The settings are shared by all stations and can be set at any pos station or back office workstation.





Back Office SMS Settings

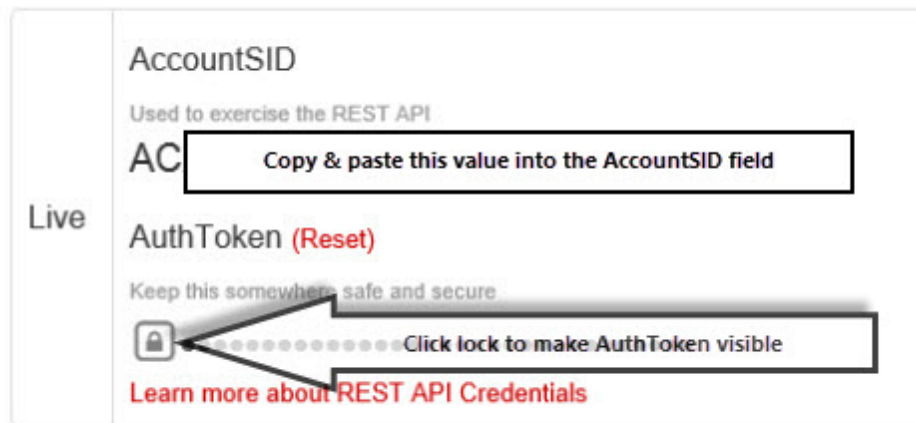
**Twilio SMS Enabled:** Check the box to enable sending SMS with Twilio from the customer information screen and web order notification screen.

**Twilio Phone Number:** A Twilio phone number enabled for sms. Only phone numbers or short codes purchased from Twilio work; you cannot use your own cell phone number. Include the plus (+) symbol, country code and area code, i.e. +15551212

**Twilio Account Sid:** All requests to Twilio require you to authenticate using HTTP basic auth to convey your identity. Your AccountSid is available on the Account Dashboard page as shown in the image below.

**Twilio Auth Token:** All requests to Twilio require you to authenticate using HTTP basic auth to convey your identity. Your AuthToken is available on the Account Dashboard page as shown in the image below.

## API Credentials



Twilio Account Settings

**Twilio Country Code:** This country code will be prefixed to the customer phone number when sending the request to Twilio. Enter numbers only; do not include the plus (+) symbol.

**Mobile Phone Prefix:** This value is optional but helpful in differentiating land lines from mobile phone numbers. Enter the leading digits of the mobile phone area code(s) or number(s) so that AmigoPOS can automatically determine if the number is from a land line or mobile.

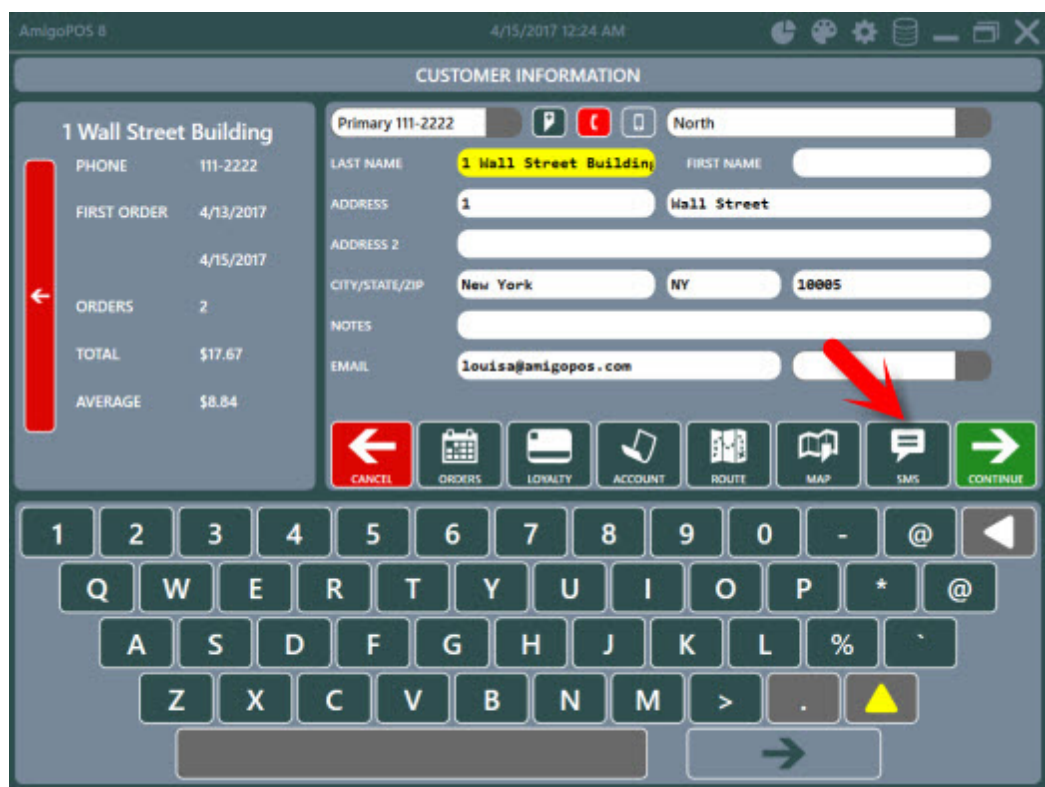
If you live in an area with multiple area codes and the area code is always entered in AmigoPOS, the prefix is the area code that is used by mobile carriers, i.e. most mobile phones in Miami use area code 786 and most land lines use 305. If your business is in an area with a single area code, the prefix is the first 3 digits of the mobile number not including the area code, i.e. in Buffalo the prefixes are 207,208,223,224, etc. Refer to the [Wikipedia article](#) for international mobile prefixes.

**Twilio Prefix Match Required:** Check box to prevent SMS from being sent to phone numbers that do not match one of the prefixes defined above. Do not enable this setting if the previous **Mobile Phone Prefix** is blank.

### Sending An SMS

Instant messages can be sent from the customer information screen and from the order recall list. The option to send an SMS from the recall list is available only for order types where the customer's phone number is entered, including web orders.

When starting an order with an order type that prompts for the customer's phone number, the customer information screen displays the **SEND SMS** button. The on-screen keyboard appears after pressing the **SEND SMS** button and a confirmation prompt is displayed at the top left after the message is sent.



Customer Information Screen SEND SMS Button

The recall list will display the **MESSAGE** button for orders entered at the pos and web orders when the customer phone number is available.



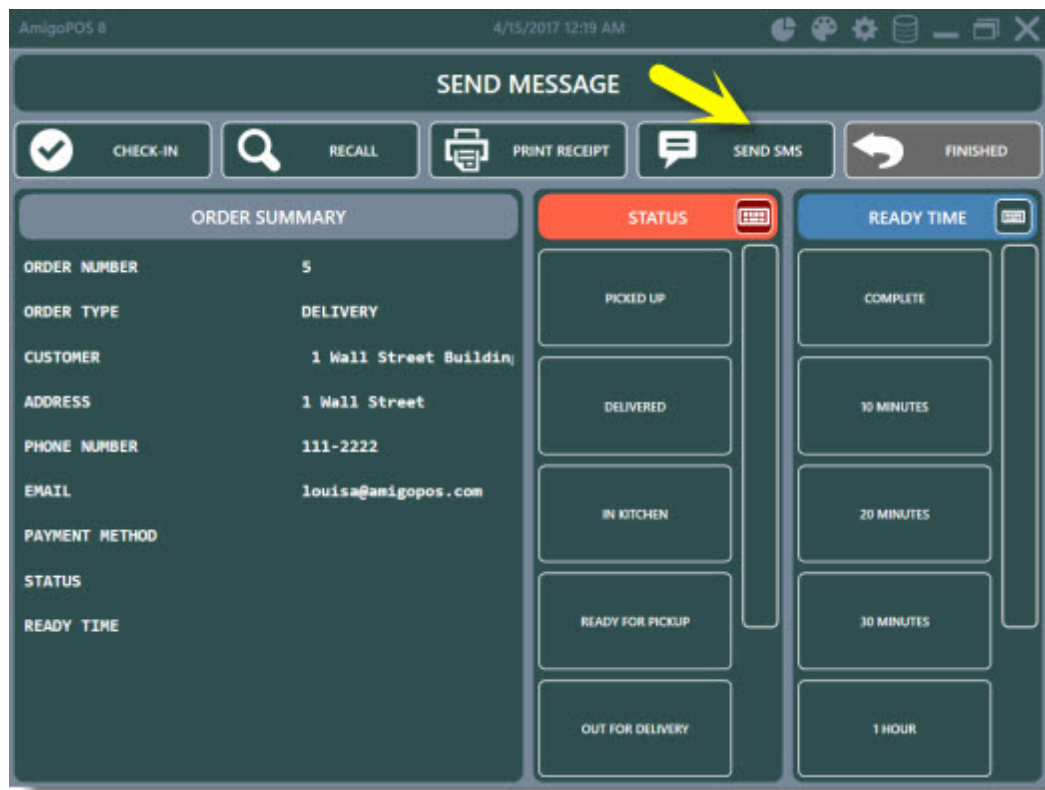
**Order Recall List SEND SMS Button**

The **WEB STATUS** button is displayed for web orders.



**Order Recall List WEB STATUS Button**

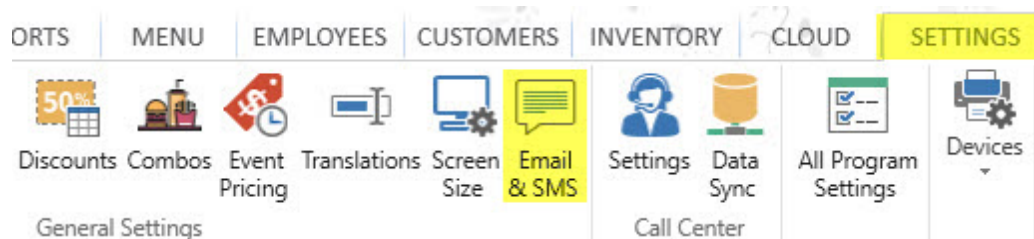
The **WEB ORDER & SEND SMS** screen is displayed after the **WEB STATUS** button is pressed on the order recall list. Specify the Status and/or Ready Time and press the **UPDATE WEB SITE** button to simultaneously update the order status page and send the sms. Note that the sms is sent only if the customer has opted to receive an sms on the web order checkout page. A confirmation prompt is displayed at the top left after the message is sent. When the customer has not opted to receive an sms, or to send an sms without updating the web order status page, the sms can be sent by pressing the **SEND SMS** button.

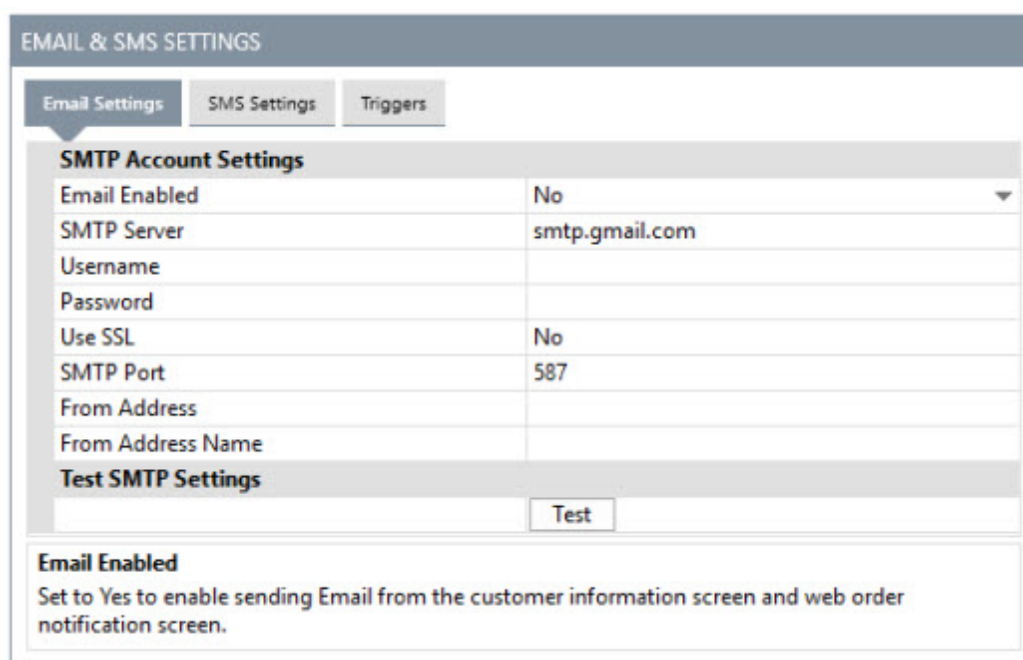


Web Status Update

## 26.4 EMail

Customers can receive order updates by email directly from AmigoPOS using your email provider's smtp server. Customers can also receive an email directly from the customer information screen before the order has been entered. Refer to the steps below to configure AmigoPOS to work with GMail's smtp server; other smtp servers use similar settings as shown at the bottom of this topic.





**EMAIL & SMS SETTINGS**

Email Settings | SMS Settings | Triggers

**SMTP Account Settings**

Email Enabled	No
SMTP Server	smtp.gmail.com
Username	
Password	
Use SSL	No
SMTP Port	587
From Address	
From Address Name	

**Test SMTP Settings**

Test

**Email Enabled**  
Set to Yes to enable sending Email from the customer information screen and web order notification screen.

Back Office > Configuration > Email Settings

#### Back Office Settings

- **Email Enabled:** Set to Yes to enable sending Email from the customer information screen and web order notification screen.
- **SMTP Server:** Enter the smtp server name. For example, Gmail users should enter smtp.gmail.com
- **Username:** The username used to login to the SMTP server. The username is the same as the email address for most SMTP servers.
- **Password:** Enter the password used to access the SMTP server. Gmail users should enter the same password used to log in to Gmail.
- **Use SSL:** Specify whether the SMTP server requires SSL. Gmail and Google Apps users should set this value to Yes.
- **SMTP Port:** Specify the port used to connect to the SMTP server. Gmail users should enter 465. Google Apps users should enter 587.
- **From Address:** Enter the email address to use as the From address. This is the same as your email address in most cases. Note that both Gmail and Google Apps ignore this value and use the email account's default email address.
- **From Address Name:** Enter the name to use with the From address, i.e. enter the business name. Many email clients will display this name next to the From address. Note that both Gmail and Google Apps ignore this value and use the name that is associated with the email account's default email address.

#### Usage

Start a delivery or pickup order, enter the phone number and email address. An email can be sent for any order type that is configured to prompt for the customer's phone number.



AmigoPOS 8 4/15/2017 12:29 AM

**CUSTOMER INFORMATION**

Primary 111-2222 North

1 Wall Street Building

PHONE 111-2222

FIRST ORDER 4/13/2017

4/15/2017

ORDERS 2

TOTAL \$17.67

AVERAGE \$8.84

LAST NAME 1 Wall Street Building FIRST NAME

ADDRESS 1 Wall Street

ADDRESS 2

CITY/STATE/ZIP New York NY 10005

NOTES

EMAIL louisaj@amigopos.com

**Navigation Bar:** CANCEL, ORDERS, LOYALTY, ACCOUNT, ROUTE, MAP, EMAIL, SMS, CONTINUE

**On-Screen Keyboard:** 1-0, QWERTYUIOP, ASDFGHJKL, ZXCVBNM, ., /, \, ^, \_

**Customer Information Screen**

Press the EMAIL button to open the editor, enter the subject and message using the on-screen keyboard and press the green button to send the message.

**SEND EMAIL**

RECIPIENT yummytakeout@hotmail.com

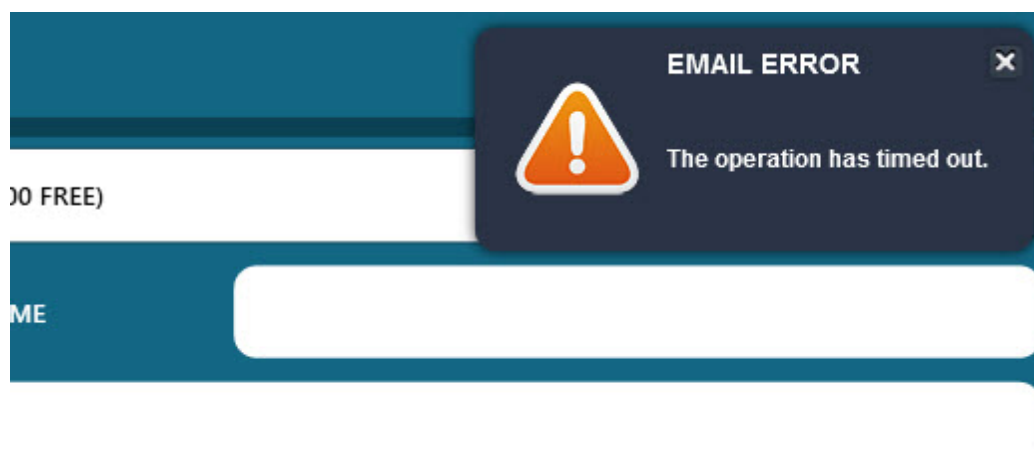
SUBJECT

MESSAGE

**Buttons:** CANCEL, SEND EMAIL

**Compose & Send Email**

A small notification appears at the top left to indicate the status of the email message. Note that if the smtp server cannot be contacted within approximately 5 seconds, a timeout error will occur. In some cases a timeout error may be incorrectly displayed for unrelated underlying errors such as invalid username or incorrect password.



Email Status Message

### Common SMTP Server Settings

#### Gmail SMTP Configuration

- Gmail SMTP server name: smtp.gmail.com
- Gmail SMTP username: your Gmail address
- Gmail SMTP password: your password
- Gmail SMTP port: 465 or 587
- SSL Enabled

#### Google Apps SMTP Configuration

- Gmail SMTP server name: smtp.gmail.com
- Gmail SMTP username: your Google Apps domain email address
- Gmail SMTP password: your password
- Gmail SMTP port: 465 or 587
- SSL Enabled

#### Hotmail SMTP Configuration

- Hotmail SMTP server name: smtp.live.com
- Hotmail SMTP user name: your Hotmail account
- Hotmail SMTP password: your Hotmail password
- Hotmail SMTP port: 25 or 465
- SSL Enabled

#### Yahoo SMTP Configuration

- Yahoo! SMTP server address: smtp.mail.yahoo.com
- Yahoo! SMTP user name: your Yahoo! Mail account
- Yahoo! SMTP password: your Yahoo! Mail password
- Yahoo! SMTP port: 465
- SSL Enabled

#### Aruba SMTP Configuration

- Aruba SMTP server address: smtp.aruba.it
- Aruba SMTP user name: your Aruba account
- Aruba SMTP password: your Aruba password
- Aruba SMTP port: 25 or 465

#### AOL SMTP Configuration

- AOL SMTP server name: smtp.aol.com
- AOL SMTP username: your AOL address
- AOL SMTP password: your account password
- AOL SMTP port: 25 or 465

**Bellsouth SMTP Configuration**

- Bellsouth SMTP server name: mail.bellsouth.net
- Bellsouth SMTP username: your Bellsouth email account
- Bellsouth SMTP password: your account password
- Bellsouth SMTP port: 25 or 465

**Bluewin SMTP Configuration**

- Bluewin SMTP server name: Smtpauths.bluewin.ch
- Bluewin SMTP username: your Bluewin email address
- Bluewin SMTP password: your Bluewin password
- Bluewin SMTP port: 25 or 465

**Comcast SMTP Configuration**

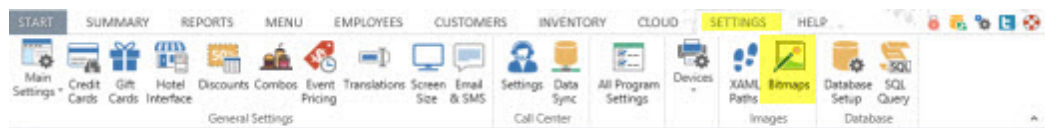
- Comcast SMTP server name: smtp.comcast.net
- Comcast SMTP username: your Comcast email address
- Comcast SMTP password: your Comcast password
- Comcast SMTP port: 25 or 465

**GMX SMTP Configuration**

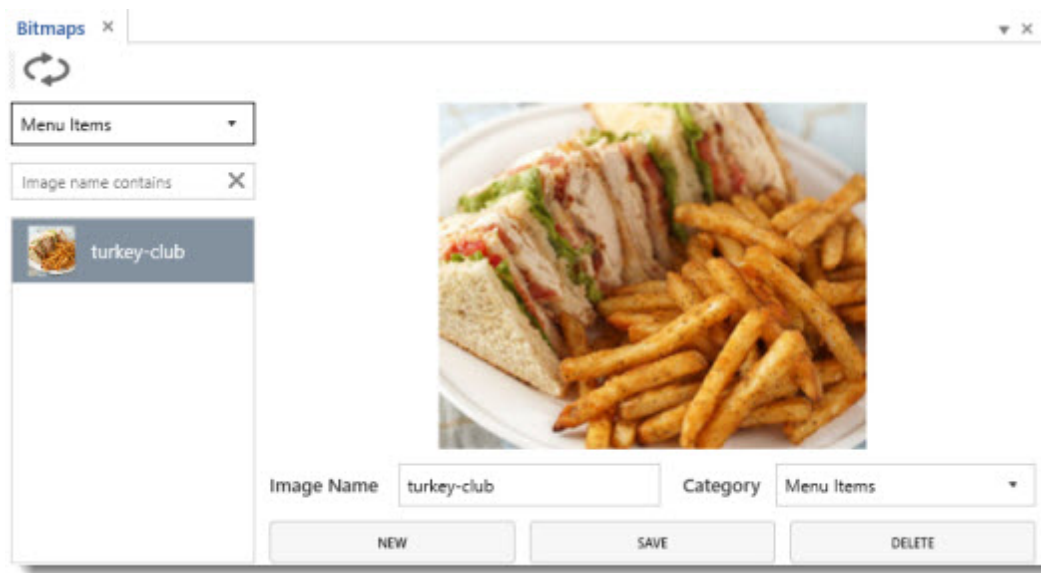
- GMX SMTP server name: mail.gmx.com
- GMX SMTP username: your GMX email address
- GMX SMTP password: your GMX password
- GMX SMTP port: 25 or 465

## 26.5 Bitmap Images

AmigoPOS stores bitmap images in the database. The image management utility can be accessed in **Back Office>Settings>Bitmaps**. The images can be assigned to menu category buttons, menu item buttons and other areas of the user interface such as custom logos. Images are assigned to categories and can be selected from the drop-down list in the *Button Image* column next on the menu item's configuration grid.



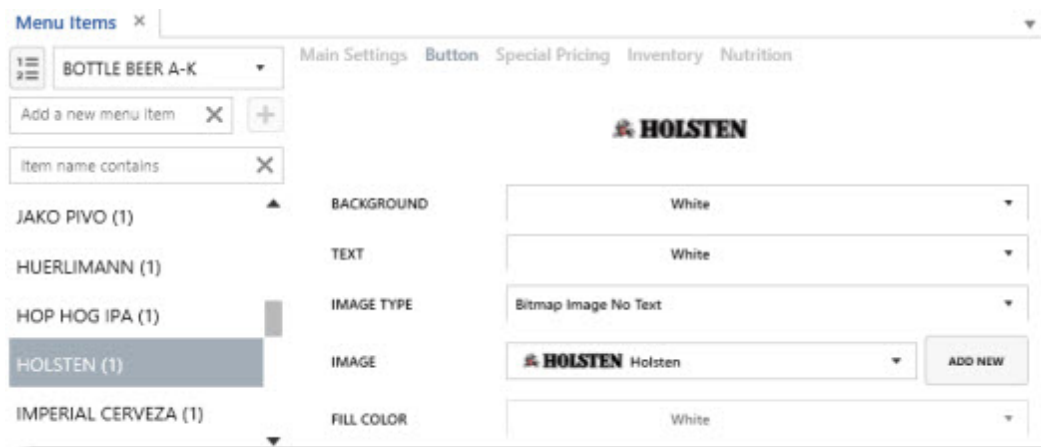
**Back Office/Settings/Bitmaps**



Images should be in Windows bitmap format (BMP) and the image size should be kept small to reduce the time required for database synchronization. Delete unused images by right-clicking on one or more images and clicking **Delete Image**. Images may be exported before deleting for later use. Using other image types such as JPEG or GIF may cause screen flickering. If an image is currently in a different format, open the image in MS Windows Paint and save it as a BMP image before importing into the database.

**Important:** Each image should have a solid background color. Select this color as the Mask (Transparency) color so that the image background does not appear on the button. This is especially relevant for seating chart images, where tables in use appear with a red background.

Right-click on any image to rename the image, change the image category or permanently delete the image. Right-click on an image category to rename, delete or add a new image category. Assign user friendly names to simplify image selection during menu setup.



Each menu category is assigned a unique image category. All images in the assigned image category appear on the drop-down list in the menu item editor or various menu grids. Select the image from the list, select the mask color (image background color that should appear transparent on the button) and adjust the image position. If text should be suppressed on the button, uncheck the box next to **Show caption on button**. Otherwise, adjust the text position and alignment so that the caption appears correctly relative to the image.

## 26.6 External Applications

Up to three external applications can be run directly from the manager screen while AmigoPOS is running.

- Leave the value for Button Caption blank to hide the button
- If the external application is recognized by Windows, enter the application name only. Otherwise, enter the full path to the application without quotes
- For applications that require command line parameters at startup, create a batch file to launch the application and enter the path to the batch file in the Application Path box.

In the example below, Notepad and cmd are recognized by Windows and only the name is required. Notepad++ is not recognized and the full path to the application is entered.

To use a .bat file, create an empty text file and save with the .bat extension. Enter the full path to the application and any parameters on the first line and save. Move the .bat file to a folder on the c:\ drive and enter the full path in the Application Path box. Additional information is available at the [Microsoft](http://Microsoft) web site.

EXTERNAL APPLICATIONS	
Button Caption (1)*	C:\ PROMPT
Application Path (1)*	cmd
Button Caption (2)*	Notepad++
Application Path (2)*	C:\Program Files (x86)\Notepad++\Notepad++.exe
Button Caption (3)*	Calculator
Application Path (3)*	calc

**Button Caption (1)\***  
Enter the caption to appear on the button used to launch external application 1. Leave blank to hide the button

Back Office>Settings>Main Settings>Manager Screen



Manager Screen

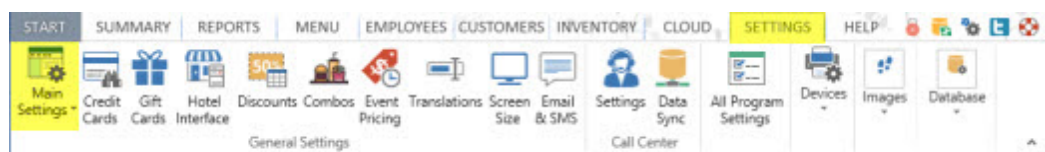
## 26.7 Age Verification

The customer may be required to present identification to verify age before purchasing menu items such as alcoholic beverages or cigarettes. AmigoPOS can prompt the user to select the type of identification, birthday and optionally enter a description. This information will also print at the bottom of the customer receipt.

### Back Office Settings

In **Back Office>Settings>Main Settings>Order Entry**, click the **Age Verification** tab to view the list of identification methods for age verification. Enter new items at the top of the grid and click the Enter key to save.

- **Age Verification Method:** The name that is displayed on the screen and printed at the bottom of the customer receipt.
- **Button Position:** Set the button position so that the most commonly used verification methods appear at the top of the list.
- **Show Keyboard:** Check the box if additional information is required for the selected identification; i.e. Driver's License Number or Passport Number.
- **Keyboard Prompt:** When the previous setting is enabled, the text to show at the top of the on-screen keyboard.



Back Office/Settings/ Main Settings

Deliveries   Settle Screen   Manager Screen   Time Clock   Employee Banking

General Settings   Sales Tax   Order Types   **Order Entry**   User Interface


Order Entry Screen   Retail   Removed Items   Void Reasons   **Age Verification**


### AGE VERIFICATION METHODS






	DESCRIPTION	BUTTON POSITION	SHOW KEYBOARD	KEYBOARD PROMPT	
+	Click here to add a new row				
	DRIVER'S LICENSE	1	<input type="checkbox"/>		✗
	GOVERNMENT ISSUED ID	3	<input type="checkbox"/>		✗
	OTHER ID	5	<input checked="" type="checkbox"/>	ENTER A DESCRIPTION	✗
	PASSPORT	2	<input checked="" type="checkbox"/>	ENTER THE PASSPORT N	✗
	SCHOOL ID	4	<input checked="" type="checkbox"/>	ENTER THE CARD NUM	✗

Age Verification Methods

In **Back Office>Settings>Peripherals**, select Receipt Printer from the drop-down list and set the value of the Age Verification custom text setting. This value prints above the age verification method and birthday on the customer receipt.

 **Receipt Printer**



Print Copies*	No Copies
2nd Receipt Printer Enabled*	No
Characters Per Line*	41
Code Page*	0
<b>Receipt Settings</b>	
<b>Custom Text</b>	
Receipt Text Loyalty Card Summary Bonus Accrued	ACCRUED
Receipt Text Loyalty Card Summary Bonus Redeemed	REDEEMED
Receipt Text Loyalty Card Summary Bonus Remaining	REMAINING
Receipt Text Loyalty Card Summary Current Order	THIS PURCHASE
Receipt Text Loyalty Card Summary Top	CARD #{LOYALTYCARDTRACK} REWARDS TO DATE
Receipt Number	RECEIPT#
Delivery Charge Text	DELIVERY
Print Guest Prefix	-- GUEST
Print Guest Suffix	--
<b>Age Verification</b>	<b>AGE VERIFICATION</b>
Amount Tendered	AMOUNT TENDERED
Bottom Line 1	

Receipt Printer Text

In **Back Office>Menu>Menu Categories**, set the value of the **Minimum Age Verification** setting to the minimum age required to purchase an item in the category.



**Menu Categories Editor**

Menu Categories: 1 Regular and Bar, 2 Add new category, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22 TOP 10, 23 WINE, 24 SHOTS, 25 MARTINIS, 26 MIXED DRINKS, 27 TOP SHELF, 28 WELL, 29 RETAIL.

**Main Settings** | Menu Item Assignments | Button

**General Settings**

Category Name	MIXED DRINKS
Button Position	26
Menu Type	Bar Menu
Web Description	
Visibility	Visible
Hide Button At This Station	<input type="checkbox"/>
Availability	In-Store & Web
Always Show Bar Modifiers	<input checked="" type="checkbox"/>
Visible Columns	3
Visible Rows	4
Minimum Age Verification	21

**Minimum Age Verification**  
Specify whether items in this menu category require age verification

### Menu Categories Editor

When the menu category is selected, the user is prompted to select the identification method and birthday.

AmigoPOS 8 4/15/2017 12:54 AM

**AGE VERIFICATION REQUIRED**

MINIMUM AGE REQUIRED 21

**PASSPORT**

**SELECT THE VERIFICATION METHOD**

- DRIVER'S LICENSE
- PASSPORT**
- GOVERNMENT ISSUED ID
- SCHOOL ID
- OTHER ID

**SELECT THE BIRTHDAY**

JANUARY	JULY	1	7	13	19	25	1996
FEBRUARY	AUGUST	2	8	14	20	26	1995
MARCH	SEPTEMBER	3	9	15	21	27	1994
APRIL	<b>OCTOBER</b>	4	10	16	22	28	1993
MAY	NOVEMBER	5	11	17	23	29	1992
JUNE	DECEMBER	6	12	18	24	30	1991
						31	1990
							1989
							1988
							1987

**CANCEL** **CONTINUE**

The continue button remains disabled until the identification method and a valid birthday is selected.



AmigoPOS 8 4/15/2017 12:54 AM

AGE VERIFICATION REQUIRED

MINIMUM AGE REQUIRED 21

**PASSPORT OCTOBER 11, 1990 (AGE 26)**

SELECT THE VERIFICATION METHOD

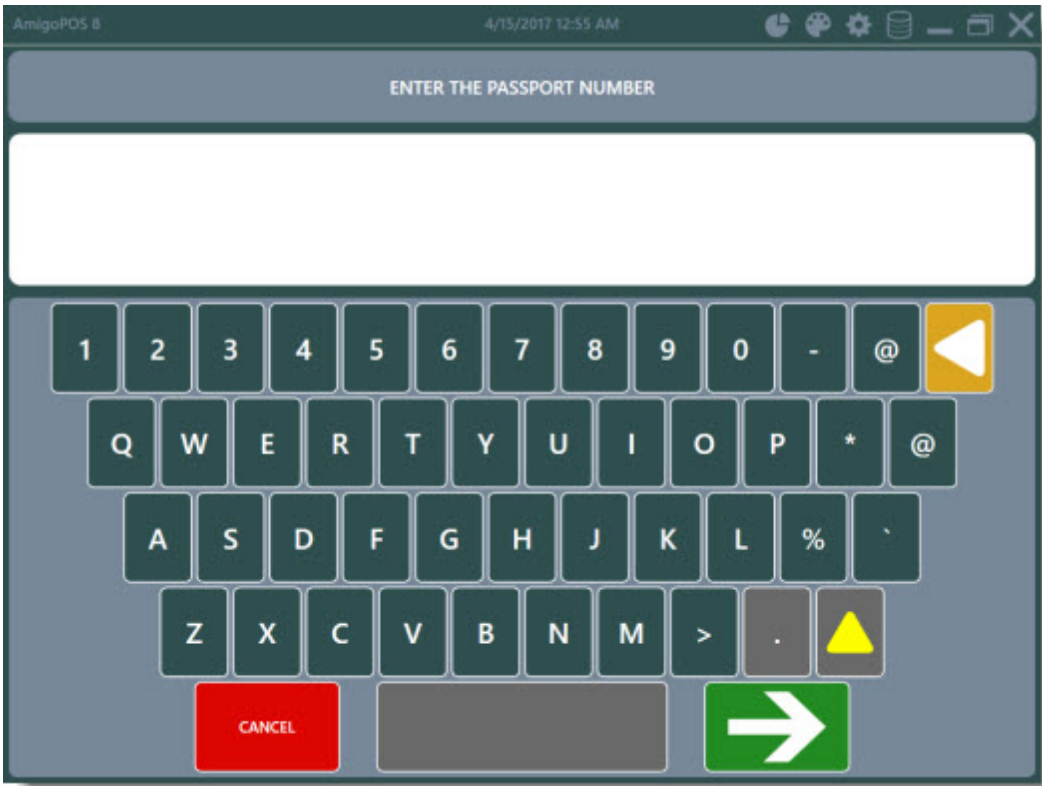
- DRIVER'S LICENSE
- PASSPORT**
- GOVERNMENT ISSUED ID
- SCHOOL ID
- OTHER ID

SELECT THE BIRTHDAY

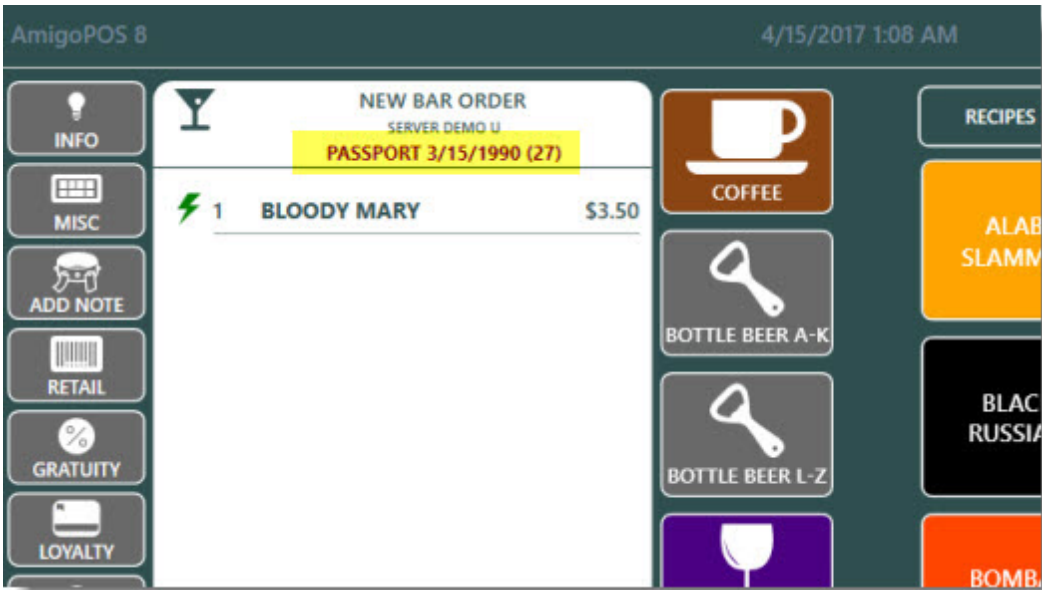
JANUARY	JULY	1	7	13	19	25	1996
FEBRUARY	AUGUST	2	8	14	20	26	1995
MARCH	SEPTEMBER	3	9	15	21	27	1994
APRIL	<b>OCTOBER</b>	4	10	16	22	28	1993
MAY	NOVEMBER	5	<b>11</b>	17	23	29	1992
JUNE	DECEMBER	6	12	18	24	30	1991
						31	1990
							1989
							1988
							1987

**CANCEL** **CONTINUE**

The on-screen keyboard is displayed if the Show Keyboard setting is enabled for the selected identification method. Otherwise, the order entry screen is displayed.



The order entry screen displays the identification type with the birthday and the customer's age above the order items.



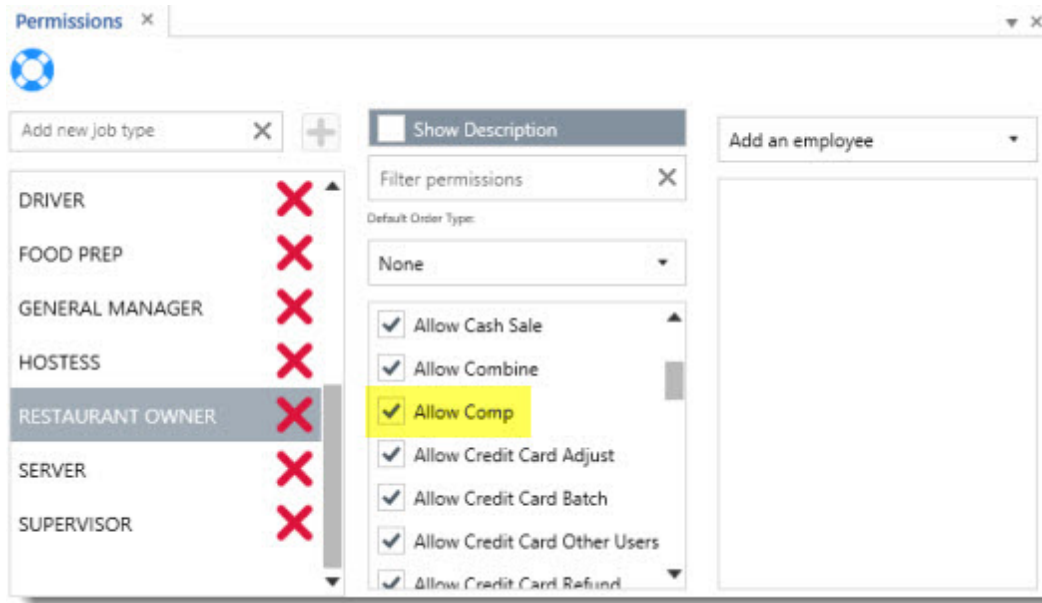
The customer receipt displays the age verification information at the bottom.



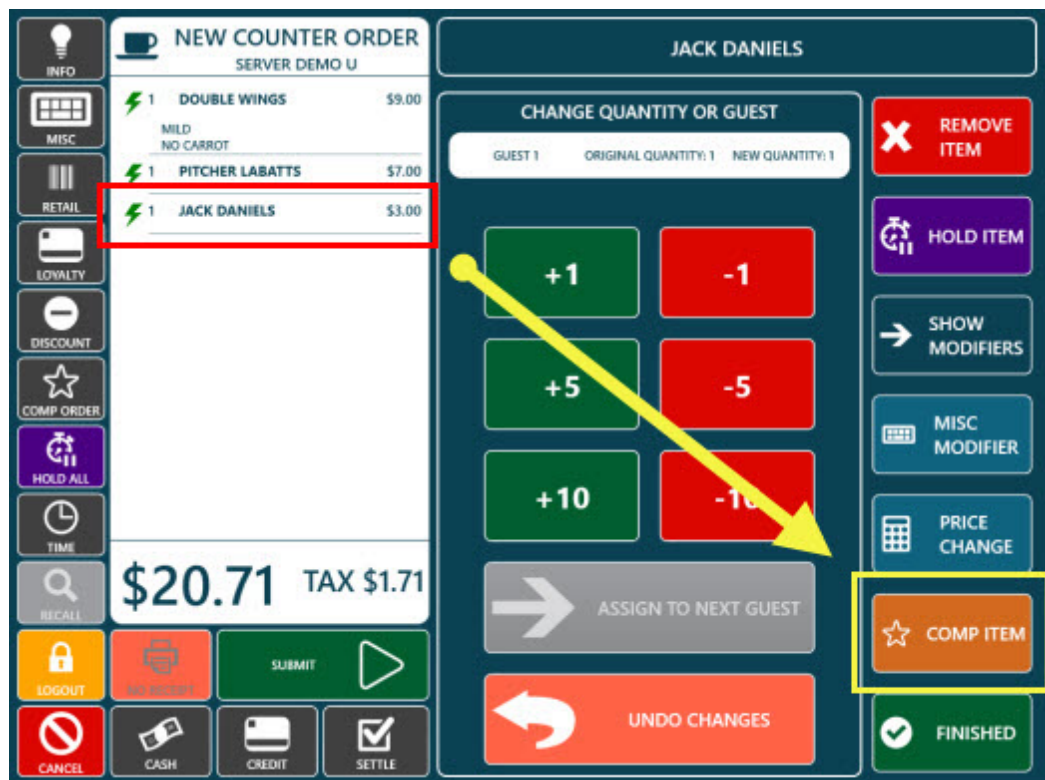
Customer Receipt

## 26.8 Comps

Orders and individual order items can be comped directly from the order entry screen by using the COMP ORDER or COMP ITEM buttons. Both comp buttons are enabled by selecting the job type from the drop-down list and setting the [Allow Comp](#)<sup>698</sup> permission to Yes. Note that the COMP ORDER button is disabled for bar tabs, when splitting or combining an order, or if there are no order items.

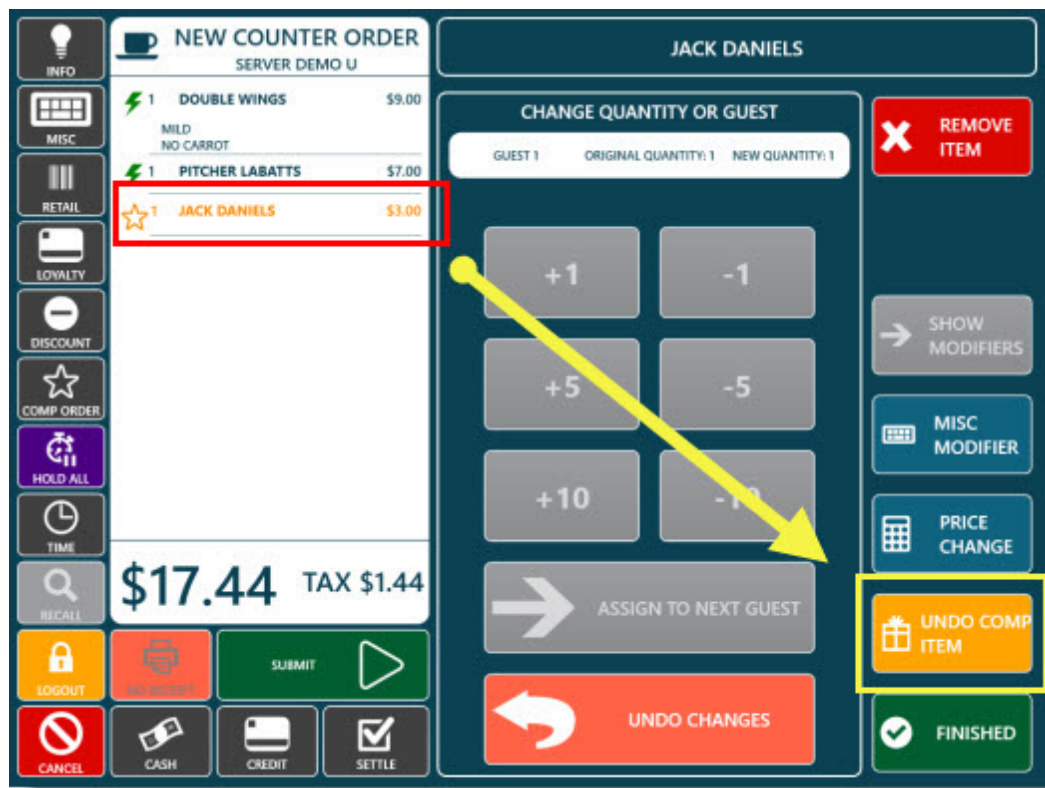


The COMP ITEM button appears after selecting the order item. Pressing the COMP ITEM button will set the price to zero.



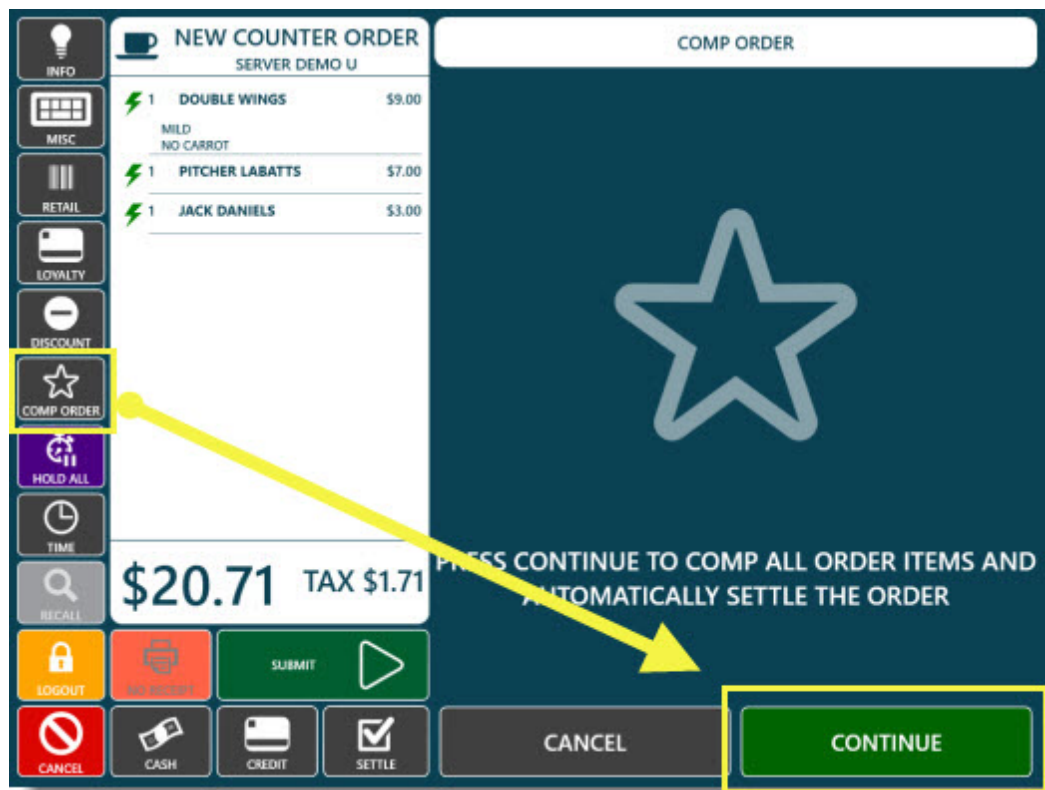
**Order Entry Screen COMP ITEM Button**

If a mistake is made, select the order item again and press the UNDO COMP ITEM button to revert to the regular price.



Order Entry Screen UNDO COMP ITEM Button

The COMP ORDER button will set the price of all order items to ZERO and automatically settle the order. Note that if a mistake is made, the order can be recalled (by toggling the OPEN/ALL button on the recall list to view settled orders) and each order item selected so that the UNDO COMP ITEM can revert order item to the regular price.



Order Entry Screen COMP ORDER Button

The current business day comps are shown on the manager screen end of day report.

CASH DRAWERS

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

SHUT DOWN

FINISHED

END OF DAY

To approximate sabran

Продаја Подзабир	\$5.00
TAX	\$0.53
	\$6.43

SALES BY ORDER TYPE SUMMARY

COUNTER(2)	\$1.00
DINE-IN(1)	\$4.74
	\$6.43

SUBTOTAL BY ITEM TYPE

Regular (5)	\$14.00
Zamandali1 (2)	\$10.00
Regular Modifier (2)	\$0.00
	\$24.00

SALES BY SERVER SUMMARY

DEMO U(3)	\$6.43
	\$6.43

SALES BY STATION SUMMARY

POS STATION 1 (3)	\$6.43
	\$6.43

COMPS SUMMARY

DOUBLE WINGS (1)	\$9.00
JACK DANIELS (1)	\$3.00
PITCHER LABATTS (1)	\$7.00
	\$19.00

CURRENT DAY - ALL POS STATIONS

LAST END OF DAY	NEVER
OPEN ORDERS COUNT	2
OPEN ORDERS TOTAL	\$6.43
OPEN PREAUTH COUNT	0
SETTLED ORDERS COUNT	1
TRANSACTIONS COUNT	0
VOIDS COUNT	0
VOIDS TOTAL	\$0.00
SUBTOTAL	\$0.00
TAX	\$0.00
DISCOUNTS	(-) \$0.00
CASH PAID OUT	(-) \$0.00
DELIVERY CHARGES	\$0.00
GRATUITIES	\$0.00
SURCHARGES	\$0.00
<b>GRAND TOTAL</b>	<b>\$0.00</b>

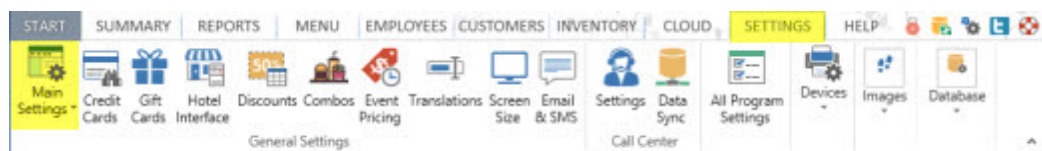
END OF DAY DISABLED

\*SETTLE 2 OPEN ORDER

PRINT

End Of Day Report Comps Summary

If the end of day report comps summary is not required, the report can be suppressed in **Back Office>Settings>Main Settings>Manager Screen** by setting the value of **End Of Day Comps Summary** to **No**.



Back Office&gt;Settings&gt;Main Settings

General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	<b>Manager Screen</b>	Time Clock	Employee Banking
Revenue Centers	User Interface		External Applications	
Drawer Reset	<b>End Of Day</b>	End of Day Reports	Special Events	

END OF DAY SETTINGS	
Disable End Of Day Drawer Reset Required	Yes
Disable End Of Day Open Preauth	Yes
Disable End Of Day Open Tickets	Yes
End Of Day Cash Paid Out Summary	Yes
End Of Day Comps Summary	Yes

<b>End Of Day Comps Summary</b> Set to Yes to show itemized comps summary on the end of day report
---

**End Of Day Report Settings**



Part 27

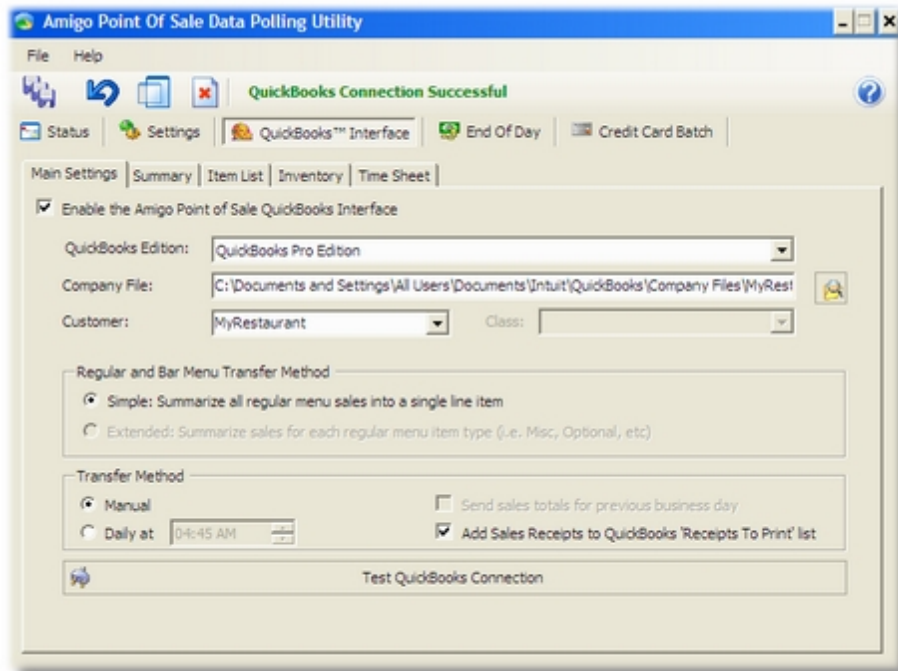
# Quickbooks Interface

## 27 Quickbooks Interface

### 27.1 Introduction

#### 27.1.1 Overview

The AmigoPOS Quickbooks Interface (QBI) provides an automatic method of transferring sales data to Intuit Quickbooks Pro™. The interface is included at no additional cost.



AmigoPOS QuickBooks Interface (QBI)

The sales data for each business day is transferred to Quickbooks in the form of a sales receipt, listing all sales, payments, discounts and other items as individual entries, as shown below. In addition, time sheet and inventory data can be transferred as well, and the ability to support multiple locations (i.e. franchises) with a single company file is supported.

**Enter Sales Receipts**

Customer: Job  
Whistlin Willy's

Class: Downtown

Date: 12/28/2008

Sale No.: 286

**Sales Receipt**

Sold To:

Item	Description	Class	Qty	Rate	Amount	Tax
Regular Menu Item	Regular Menu Item Sales	Downtown		1,416.00	1,416.00	Non
Regular Menu Optional	Regular Menu Optional Sales	Downtown		6.00	6.00	Non
Misc Items	Misc Item Sales	Downtown		46.00	46.00	Non
Bar Menu Item	Bar Menu Item Sales	Downtown		624.00	624.00	Non

Customer Message: [ ]

Tax: Out of State (0.0%) 0.00

Total: 0.00

Check No.: [ ] Payment Method: [ ]

To be printed: [ ] To be e-mailed: [ ] Customer Tax Code: Non Memo: 11/29 7:00:00 AM-11/30/2008 6:59:59 AM

Add Time/Costs...

Process credit card payment when saving: [ ]

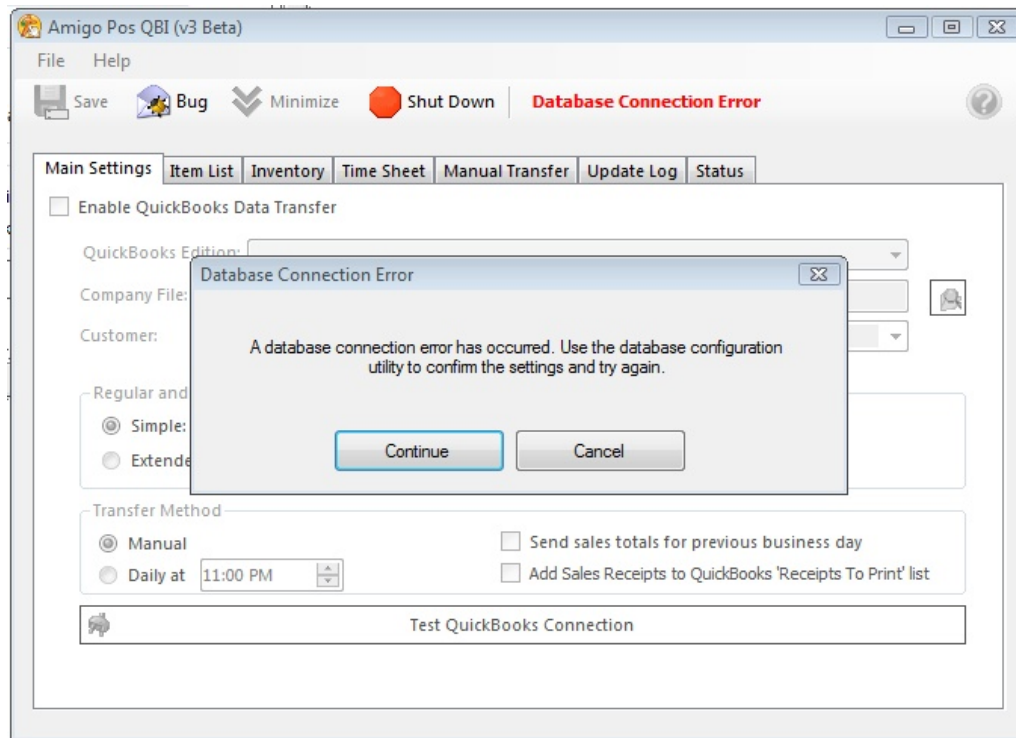
Save & Close Save & New Revert

QuickBooks Sales Receipt

## 27.1.2 Installation

### Installation

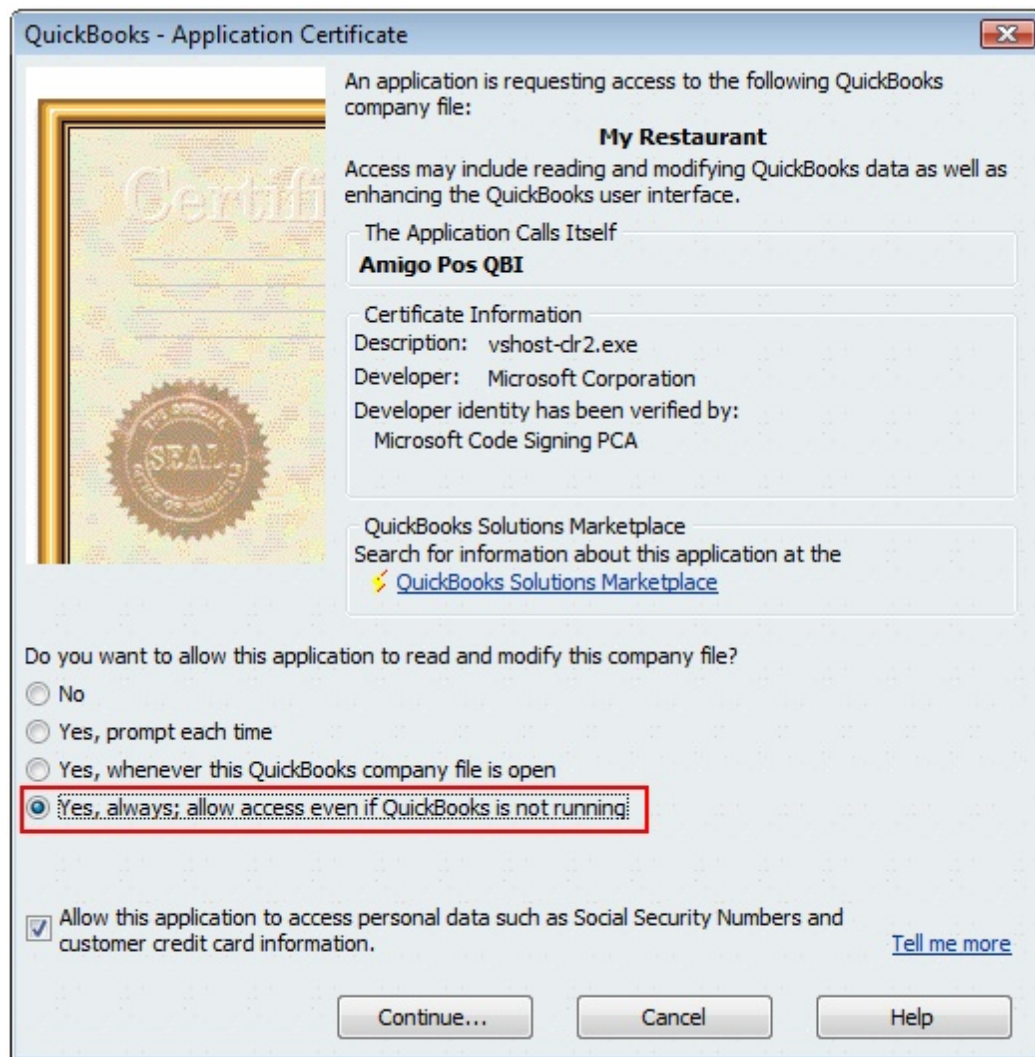
1. Download the AmigoPOS Quick Books Interface from <http://www.amigopos.com/Support/DriverDownload>. Note that QuickBooks 2012 requires the use of AmigoPOS QuickBooks Interface v3.7.4530 or later and AmigoPOS 8.12.51 or later.
2. Log in as Administrator and install the AmigoPOS QBI and AmigoPOS 8 on the same pc running QuickBooks. Install both applications in the same directory so that a common help file is used (the default installation directory is c:\Program Files\AmigoPOS)
3. Configure the AmigoPOS database using the Database Configuration Utility.
4. After installation, reboot and start the AmigoPOS QBI. If a database connection occurs, as shown below, open the Database Configuration Utility and confirm that the settings are correct.
5. Start QuickBooks. Click the QuickBooks tab in the AmigoPOS QBI and check the box next to **Enable the AmigoPOS QuickBooks Interface**. A delay of 20-30 seconds is possible while the AmigoPOS QBI attempts to communicate with QuickBooks. This delay is normal and will occur whenever the AmigoPOS QBI is launched. After communications are established, the QuickBooks permissions dialog will appear, as shown below. After permissions are granted, click the Save button in the AmigoPOS QBI.
6. Read the ensuing help topics to configure the QuickBooks item list and other settings



Database Connection Error

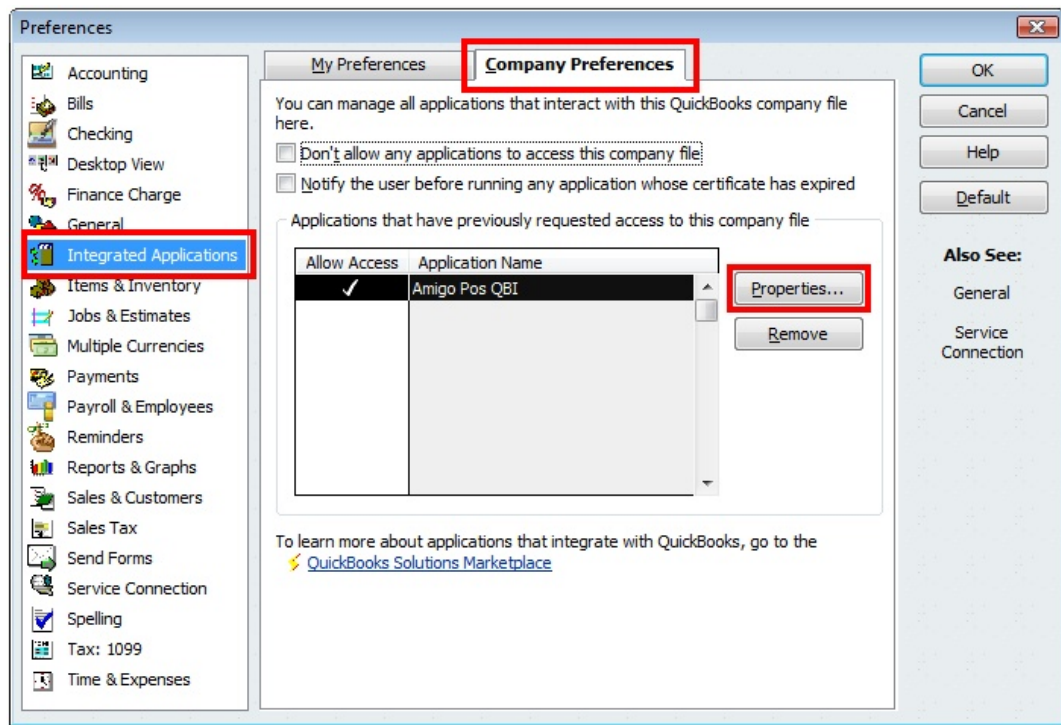
### Permissions

The application must be given permission to interact with QuickBooks. Start the AmigoPOS QBI with QuickBooks already running. A prompt will appear asking the user to confirm that the application should be given sufficient permissions to interact with the QuickBooks company file. Select **Yes, always allow access even if QuickBooks is not running** and check the box to allow access to personal data (Required for AmigoPOS to transfer and modify employee data). Click the **Continue...** button and click the **Done** button at the next prompt to confirm.



QuickBooks Application Certificate Prompt

Permissions can be reviewed, modified or removed in QuickBooks by clicking **Edit - Preferences...** and selecting the **Integrated Applications** shortcut. Select AmigoPOS QBI and click the **Properties...** button to view the settings.



QuickBooks Integrated Application Preferences

### Startup

Click the AmigoPOS QBI shortcut in the AmigoPOS program files folder to start the application. If the utility has been previously run, it may start minimized in the taskbar, next to the clock. Double click the icon to activate the user interface. The AmigoPOS QBI requires 30 to 90 seconds initial startup, depending on the location of the AmigoPOS database and whether QuickBooks is already running.

After configuration and testing is complete, add the application to the Startup Folder so that it starts automatically whenever the PC is booted.

## 27.1.3 System Requirements

### System Requirements

- Microsoft Windows 7,8,10 (32- or 64-bit)
- Microsoft .Net 4
- Microsoft XML 4+
- Intuit Quickbooks Pro 2008 or later (may run on earlier versions of Quickbooks that support qbXML Version 7 or later, but support is limited to version 2008 or later)

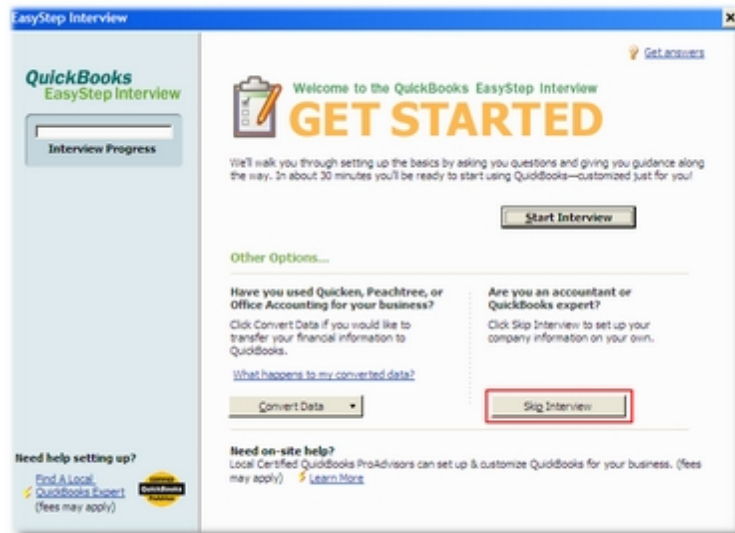
### Note on QuickBooks SimpleStart:

**QuickBooks Simple Start Edition does not support adding inventory data or time sheet data. In addition, all items and accounts must be created in QuickBooks directly and then set up in the AmigoPOS QBI. The only data that can be transferred using the AmigoPOS QBI is the daily sales receipt.**

If these limitations are acceptable, QuickBooks Simple Start Free Edition (20 customer limit) is available free from [Intuit](#).

## 27.1.4 QuickBooks Company File

Start a new QuickBooks company file by clicking *File - New Company...* at the top menu bar. The Interview screen then appears, prompting the user to enter some basic information to simplify the file creation process. The following screens are part of the interview process. Only those screens relevant to the AmigoPOS QBI are shown. AmigoPOS can work with blank company files that contain no items and few, if any accounts. To create a blank company file, click the **Skip Interview** button, specify the organization type and the company file is created with no items and few accounts.

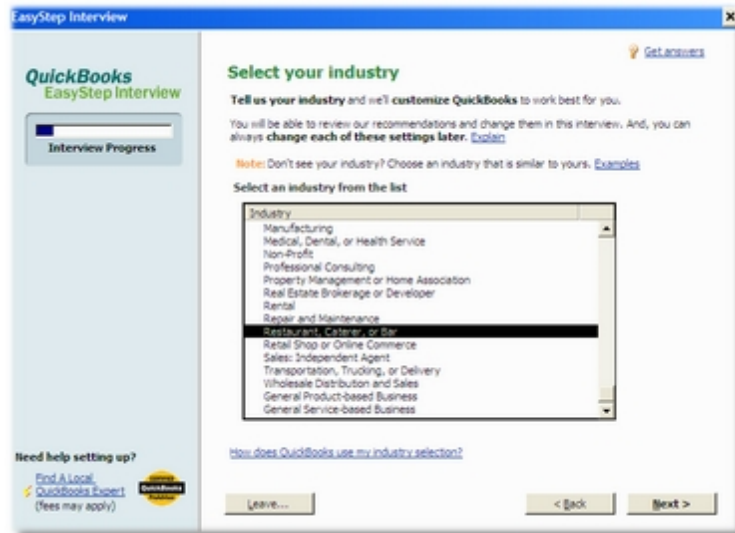


QuickBooks New Company File Start Screen

At minimum, enter the business name and click the **Next** button (CTL-N) to continue.

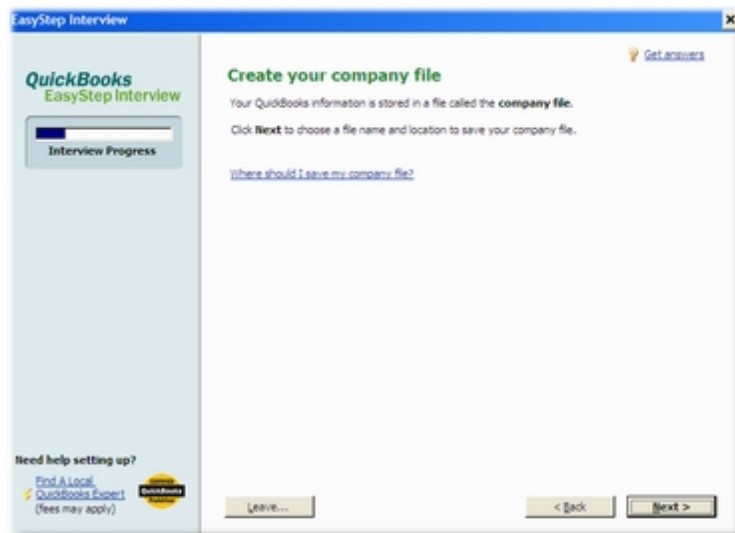
## New Company Information Screen

Select **Restaurant, Catering or Bar** as the industry type and click the **Next** button (CTL-N) to continue.



QuickBooks Industry Type

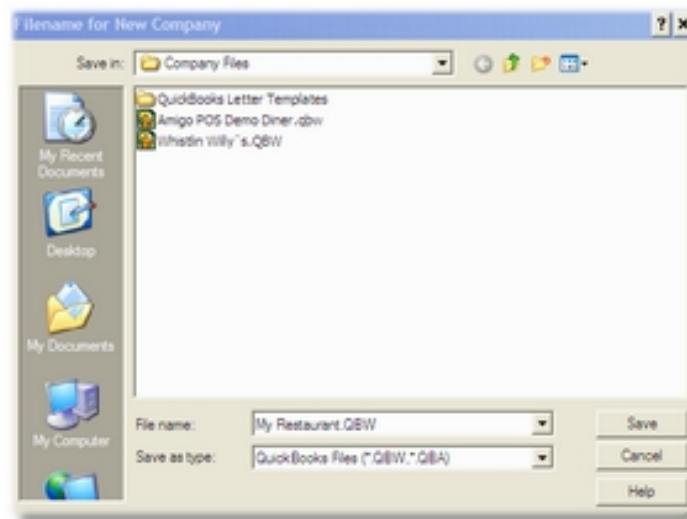
When prompted to create your company file, click the **Next** button (CTL-N) to open the new file dialog.



New Company File Confirmation

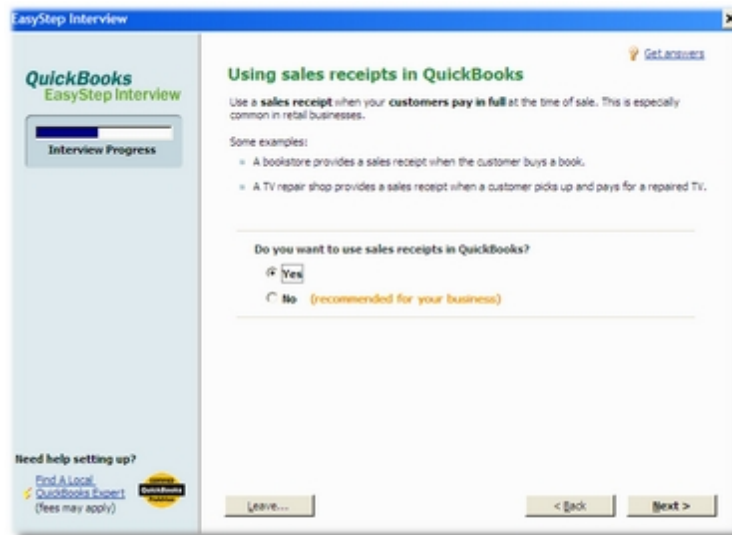
Enter a familiar name, use the default path and click the **Save** button to create the new company file.





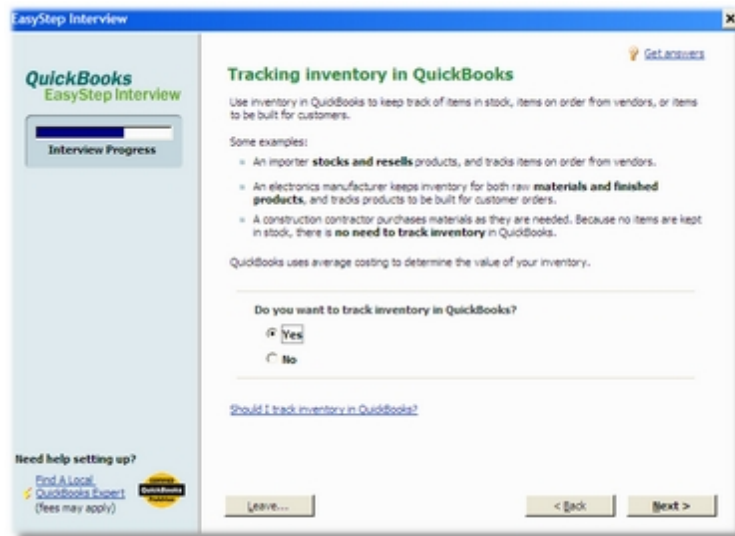
New Company File Dialog

Select **Yes** when prompted to specify whether sales receipts are used and click the **Next** button (CTL-N) to continue.



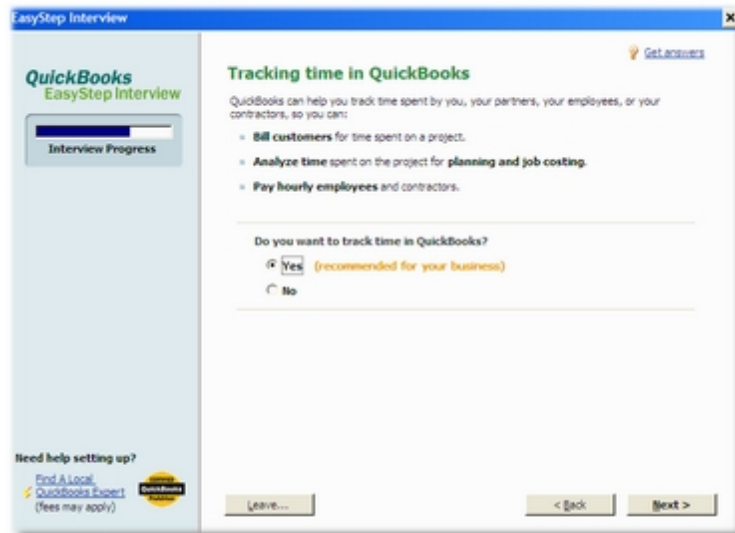
Sales Receipt Preferences

Select **Yes** when prompted to specify whether to track inventory and click the **Next** button (CTL-N) to continue.



QuickBooks Inventory Tracking

Select **Yes** when prompted to specify whether to track time data and click the **Next** button (CTL-N) to continue.



QuickBooks Time Tracking

Select **Yes** when prompted to specify whether the business has employees and click the **Next** button (CTL-N) to continue.

The screenshot shows the 'QuickBooks EasyStep Interview' window. On the left is a sidebar with 'QuickBooks EasyStep Interview' and 'Interview Progress'. The main area is titled 'Do you have employees?' with a 'Get answers' link. Under 'Yes', there are two radio buttons: 'We have 1-9 employees.' (selected) and 'We have 10-99 contractors.'. Under 'No', there is a radio button. Below this is a section for 'QuickBooks Payroll' with a description and a 'Get answers' link. At the bottom are 'Leave...', '< Back', and 'Next >' buttons. A 'Need help setting up?' section is at the bottom left with links to 'Find a Local QuickBooks Expert' and 'Download'.

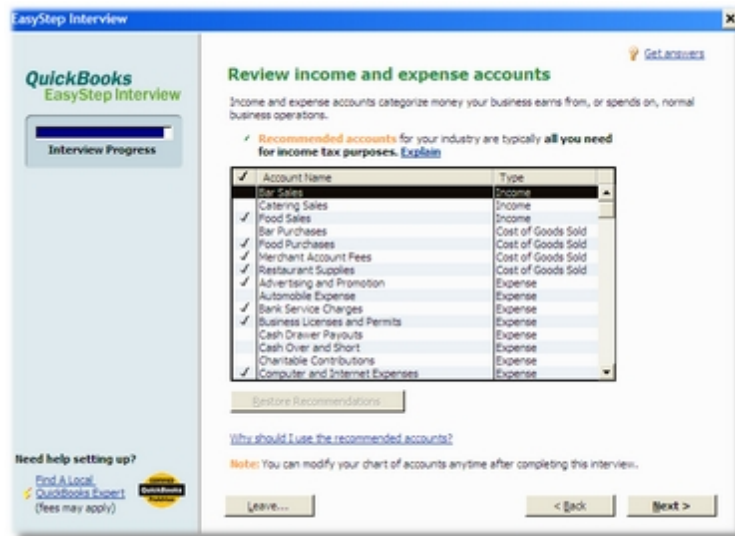
QuickBooks Employee Tracking

Select **Yes** when prompted to add a new bank account and click the **Next** button (CTL-N) to open the new account dialog. Enter at least one account that will be used for cash and credit card deposits.

The screenshot shows the 'QuickBooks EasyStep Interview' window. On the left is a sidebar with 'QuickBooks EasyStep Interview' and 'Interview Progress'. The main area is titled 'Add your bank account' with a 'Get answers' link. Below the title is a paragraph explaining the need for bank accounts. Then, 'Would you like to add an existing bank account?' is asked with two radio buttons: 'Yes.' (selected) and 'No, I'll add a bank account later.'. Below this is a link 'How can I add my bank accounts later?'. At the bottom are 'Leave...', '< Back', and 'Next >' buttons. A 'Need help setting up?' section is at the bottom left with links to 'Find a Local QuickBooks Expert' and 'Download'.

Adding a Bank Account

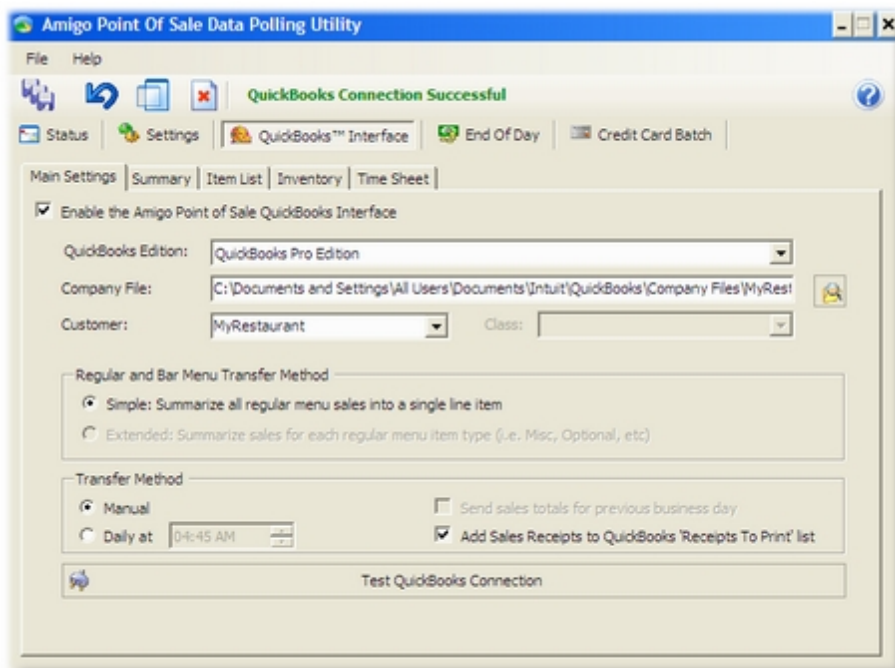
Review default account list. These accounts are sufficient for the AmigoPOS QBI, but you may select additional accounts if required for your business. Click the **Next** button (CTL-N) to continue.



QuickBooks Default Accounts

## 27.2 Settings

the AmigoPOS QBI settings must be configured to work with your existing QuickBooks company file. The QuickBooks company file is a database that contains all company settings and sales data. This file is created the first time Quickbooks is run after installation, or by clicking **File - New Company...** on the top menu bar in the QuickBooks GUI.



## QBI Settings Dialog

Note: Ensure that the blue **Save** button at the top left is pressed after any changes are made or the AmigoPOS QBI will use the previous settings to attempt any transfers.

**QuickBooks Company File**

the AmigoPOS QBI settings must be configured to work with your existing QuickBooks company file. The QuickBooks company file is a database that contains all company settings and sales data. This file is created the first time Quickbooks is run after installation, or by clicking **File - New Company...** on the top menu bar.

**QuickBooks Customer**


The QuickBooks customer is the customer used on the sales receipt that the AmigoPOS QBI sends to QuickBooks. This customer should be the name of the business.

For businesses with more than one location, you may use multiple customer names, one customer for each location. An alternative is to use a QuickBooks class, described below.

**QuickBooks Class** (Not required)

The QuickBooks class can also be used to track sales from multiple locations using a single company file. Each class corresponds to a location. This value is optional but recommended for businesses with multiple locations.

**QuickBooks Accounts**

Each [QuickBooks Item](#)  is assigned to a Quickbooks account. In QuickBooks, click CTL-A to view the chart of accounts. Accounts may be categorized as asset, expense, cost of goods sold, etc. AmigoPOS does not interact directly with QuickBooks accounts, but care must be taken to assign each item to the proper account or errors will result.

**Settings Notes**

Some settings may not be available unless other settings are enabled first. For example, if the **Enable the AmigoPOS QuickBooks Interface** was not previously checked, the settings under the Inventory and Time Sheet tabs will be disabled. Check the box and click the Save button to enable other options.

The **Send sales totals for previous business day** setting is intended for 24-Hour operations so that current business day's sales data is never sent to QuickBooks due to the pos being used during the transfer. This setting affects both automatic and manually initiated transfers.

The **Add Sales receipts to QuickBooks 'Receipts To Print' List** setting will show recent sales receipts on the Company Snapshot screen in QuickBooks.

Inventory and Time Sheet is not available for QuickBooks Simple Start users.

The **Combine all days on a single sales receipt** setting is recommended when transferring a large number of days. Click the Save button after changing this setting and before performing a transfer. If this setting is not enabled, allow up to 2 minutes to transfer each business day selected.

If the **Add New Employees to QuickBooks before each update** setting is not enabled, time sheet data for new employees will be rejected by QuickBooks.

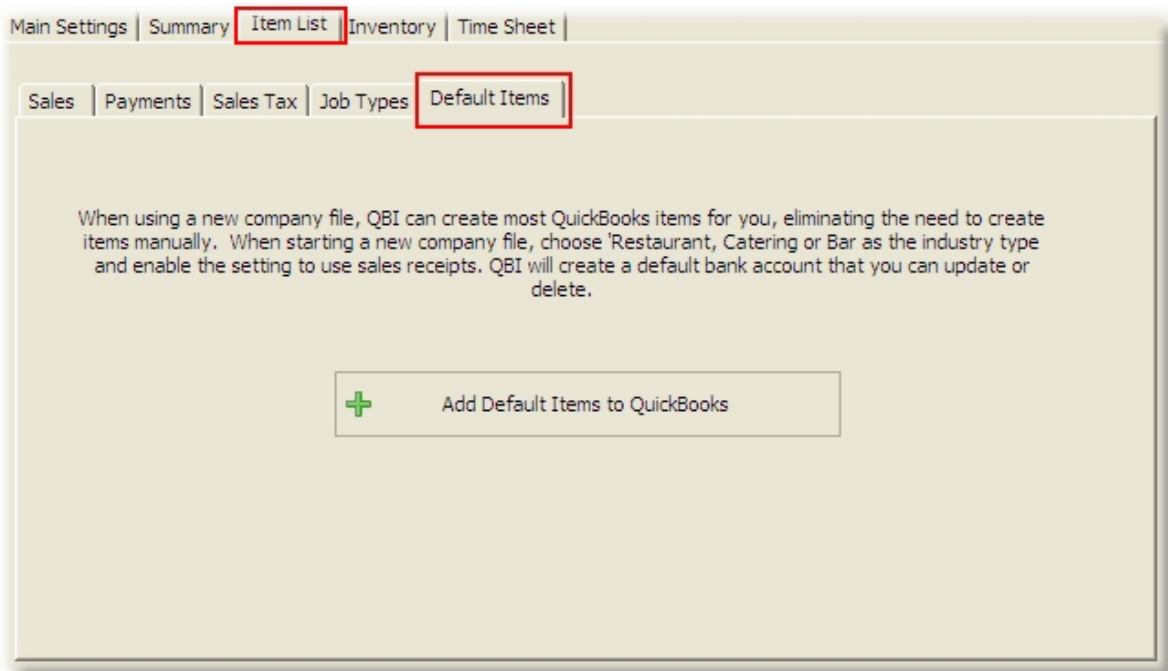
## 27.2.1 Items

Quickbooks categorizes all sales and payments by item type in the Quickbooks **Item List**. AmigoPOS item types must be matched to the corresponding Quickbooks item type. Select Lists - Item List in Quickbooks to view the current item list. Click **CTL-N** to add a new item, **CTL-D** to delete an existing item or **CTL-E** to edit the selected item.

Note that **QuickBooks Simple Start Edition does not support automatic item creation**. Only QuickBooks Pro and QuickBooks Premier users may use the AmigoPOS QBI to create default items automatically. QuickBooks Simple Start users may enter new items by selecting Company - Lists - Item List and clicking CTL-N to open the New Item dialog.

The AmigoPOS QBI can create a set of default items, eliminating the need to enter and configure each item individually. To create a set of default items (and required accounts), select the Default Items tab and click the **Add Default Items to QuickBooks** button. After the default items are created, each item can be modified in the QuickBooks interface if required.

Since QuickBooks does not allow duplicate names, using this function multiple times will have no effect.



QBI Default Items

The following item types must be configured in Quickbooks before the AmigoPOS QBI can transfer sales data:

- **Sales Items** 1008
- **Payment Items** 1008
- **Sales Tax Items** 1009
- **Discount Item** 1010
- **Cash Payout Item** 1011
- **Cash Discrepancy Item** 1012
- **Job Type Items** 1013
- **Inventory Items** 1025

### Sales Items

In the most basic configuration, AmigoPOS categorizes **Sales Items** as follows:

- Regular Menu Item
- Regular Menu Optional
- Miscellaneous Item
- Retail Item
- Bar Menu Item
- Bar Menu Optional
- Pizza Menu Item (Size, Style, Ingredient & Prep Item)
- Gift Card Sales
- Delivery Charge
- Take Out Container
- Bottle Deposit
- Customer Account Payment

Each AmigoPOS sales item type must have a corresponding Quickbooks item type. Click CTL-N and enter the information for the new item, as shown below. In this example, Regular Menu Items is classified as a non-inventory part that belongs to the Food Sales account. Click OK to save the changes.

Enter or edit a Quickbooks Sales Item

### Payment Items

Each QuickBooks payment item corresponds to an AmigoPOS payment type. Credit card totals are transferred as individual sums (i.e. Visa total, MasterCard total, American Express total and Discover total).

At minimum, add a new QuickBooks for cash transactions total and another for Credit Card transactions total. To add a new payment item to QuickBooks, open the Item List and click CTL-N. Select **Payment** from the drop-down list, select the **Bank Account** that this payment type is deposited to, select the payment method and enter a unique name. Then select the new item on the AmigoPOS QBI Items - Payments - Discount QuickBooks Item setting. Click Save to update.

After adding the new QuickBooks items, assign each payment type to a new QuickBooks payment item, as shown below.

**Edit Item**

Type: Payment Use to record a partial payment at the time of the sale. It reduces the amount owed on an invoice.

Item Name/Number: Cash Deposit

Description: Cash Payments

Payment Method: Cash

☐ Group with other undeposited funds

☒ Deposit To: Bank Account #1

☐ Item is inactive

OK Cancel Custom Fields Spelling

Enter or edit a Quickbooks Payment Item

Transaction Type (Amigo)	Payment Type (QuickBooks)
ACCOUNT PAYMENT	Cash Deposit
ADD GRATUITY	Cash Deposit
CASH	Cash Deposit
CHECK	Cash Deposit
FOREIGN CURRENCY	Cash Deposit
GIFT CARD	Cash Deposit

QBI Payment Item Assignments

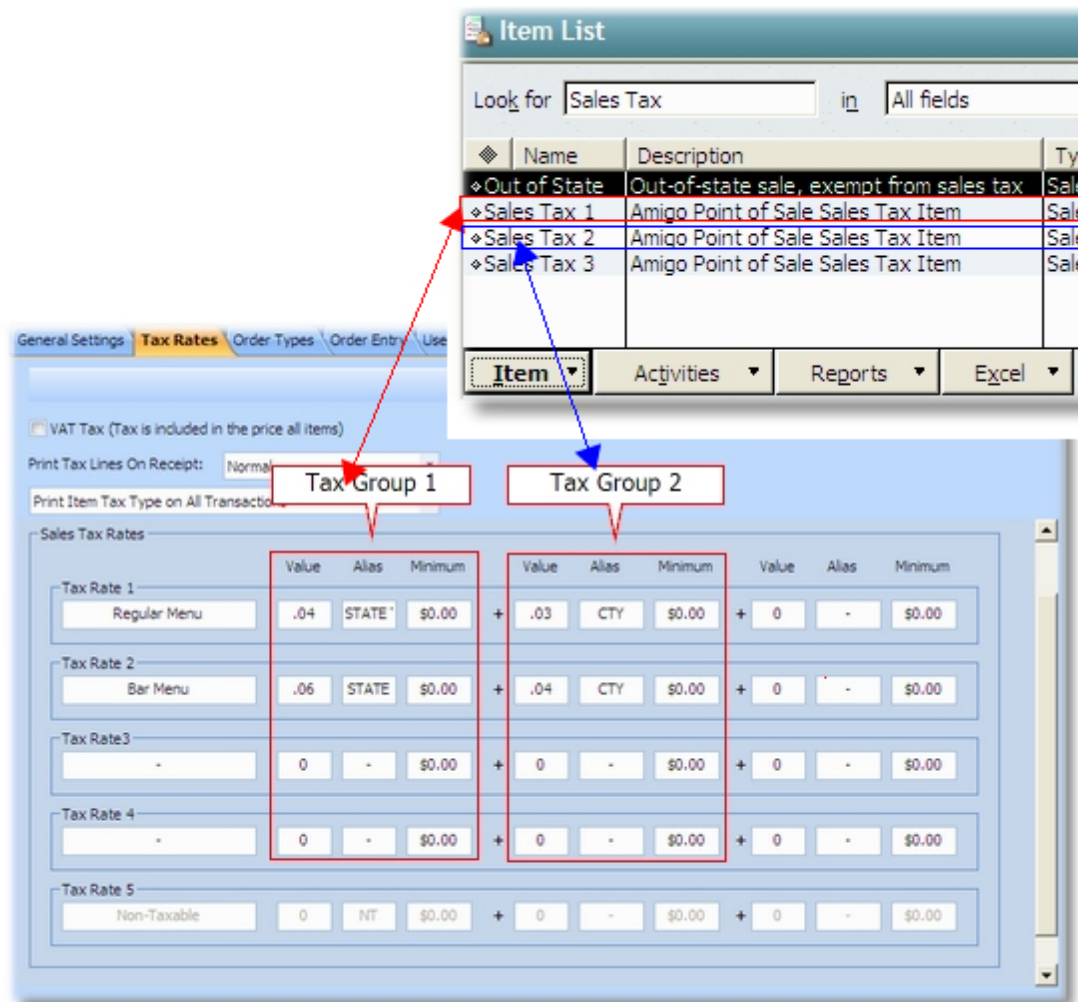
### Sales Tax Items

AmigoPOS may have up to 4 tax rates defined (in addition to the non-taxable item rate), each with 3 tax groups.

For example, the regular food items tax rate may be 7%, with 4% paid to the state tax agency and 3% paid to the county tax agency, but menu items are taxed at 10%, with 6% paid to the state tax agency and 4% paid to the county tax agency. The state tax belongs to group 1 and the county tax belongs to group 2, as shown below. Each sales tax group is represented as a single sales tax item in QuickBooks, so that the combination of the state tax agency portion of regular menu sales and bar menu sales is sent to QuickBooks item *Sales Tax 1* and the combination of the county tax agency portion of regular menu sales and bar menu sales is sent to QuickBooks item *Sales Tax 2*. The tax rate configuration supports complicated tax methods, i.e. Canadian users may use GST as tax group 1 and PST as tax group 2. Refer to the [Sales Tax](#) help topic for additional details.

Add 3 QuickBooks sales tax items and assign a vendor to each item (the vendor corresponds to the tax agency).





AmigoPOS Tax Rates Screen

### Discount Item

The Quickbooks discount item is used to store the value of the sum of all discounts issued on a given business day. To add a new discount item to QuickBooks, open the Item List and click CTL-N. Select **Discount** from the drop-down list, specify non-taxable status, enter a unique name and assign to the **Food Sales** account. Then select the new item on the AmigoPOS QBI Items - Payments - Discount QuickBooks Item setting. Click Save to update.

**Edit Item**

Type: Discount Use to subtract a percentage or fixed amount from a total or subtotal. Do not use this item type for an early payment discount.

Item Name/Number: Discounts ☐ Subitem of

Description:  Amount or %: 0.00

Account: Food Sales

Tax Code: Non Discount is applied after sales tax

☐ Item is inactive

OK Cancel Custom Fields Spelling

QuickBooks Discount Item

Sales Payments Sales Tax Job Types

Cash Payout QuickBooks Item: Cash Discrepancy

Cash Discrepancy QuickBooks Item: Cash Discrepancy

Discount QuickBooks Item: Discounts

Transaction Type (Amigo)	Payment Type (QuickBooks)
ACCOUNT PAYMENT	Cash Deposit
ADD GRATUITY	Cash Deposit
CASH	Cash Deposit
CHECK	Cash Deposit
FOREIGN CURRENCY	Cash Deposit
GIFT CARD	Cash Deposit

QBI Discount Item Configuration

### Cash Payout Item

The cash payout item contains the sum total of all cash payouts performed at all POS pos stations on a given business day. To add a new cash payout item to QuickBooks, open the Item List and click CTL-N. Select **Other Charge** from the drop-down list, specify non-taxable status, enter a unique name and assign to the **Cash Drawer Payouts** account. Then select the new item on the AmigoPOS QBI Items - Payments - Cash Payout QuickBooks Item setting. Click Save to update.

The 'Edit Item' window shows the following configuration:

- Type:** Other Charge (dropdown menu)
- Item Name/Number:** Cash Paid Out (text field)
- Subitem of:** (empty dropdown menu)
- Description:** (empty text area)
- Amount or %:** 0.00 (text field)
- Tax Code:** Non (dropdown menu, highlighted with a red box)
- Account:** Cash Drawer Payouts (dropdown menu)
- Buttons:** OK, Cancel, Custom Fields, Spelling
- Checkboxes:**
  - ☐ Subitem of
  - ☐ This item is used in assemblies or is a reimbursable charge
  - ☐ Item is inactive

QuickBooks Cash Payout Item

### Cash Discrepancy Item

the AmigoPOS QBI will balance all sales data so that sales revenue is equal to payments less discounts. In some cases, the amounts may not be equal, such as when orders are partially settled, amounts are rounded, or when refunds are issued. The Cash Discrepancy item is the sum of transactions - the sum of total sales - sum of discounts + sum of cash payouts. Note that cash payouts are deducted from the cash transaction amount before it is transferred to QuickBooks.

To add a new cash discrepancy item to QuickBooks, open the Item List and click CTL-N. Select **Other Charge** from the drop-down list, specify non-taxable status, enter a unique name and assign to the **Cash Over and Short** account. Then select the new item on the AmigoPOS QBI Items - Payments - Cash Discrepancy QuickBooks Item setting. Click Save to update.

The 'Edit Item' window shows the following configuration:

- Type:** Other Charge (dropdown menu)
- Item Name/Number:** Cash Discrepancy (text field)
- Subitem of:** (empty dropdown menu)
- Description:** (empty text area)
- Amount or %:** 0.00 (text field)
- Tax Code:** Non (dropdown menu, highlighted with a red box)
- Account:** Cash Over and Short (dropdown menu)
- Buttons:** OK, Cancel, Custom Fields, Spelling
- Checkboxes:**
  - ☐ Subitem of
  - ☐ This item is used in assemblies or is a reimbursable charge
  - ☐ Item is inactive

QuickBooks Cash Discrepancy Item

### Job Type Items

When transferring time sheet data, QuickBooks requires a service item to be associated with each employee's time sheet entry. AmigoPOS can create these

To add a new job type item to QuickBooks, open the Item List and click CTL-N. Select **Service** from the drop-down list, specify non-taxable status, enter a unique name and assign to the **Payroll Expenses** account. Then select the new item on the AmigoPOS QBI Items - Job Types next to each AmigoPOS permission name. Click Save to update. This process must be repeated if the AmigoPOS permissions grid is modified.

View the [Time Sheet Data](#) <sup>1027</sup> help topic for additional details.

The screenshot shows the 'Edit Item' dialog box in QuickBooks. The 'Type' is set to 'Service'. The 'Item Name/Number' is 'General Manager'. The 'Rate' is 0.00. The 'Tax Code' is 'Tax'. The 'Account' is 'Payroll Expenses'. The 'Description' is 'Amigo Point of Sale Permission: General Manager'. The 'Item is inactive' checkbox is unchecked. The 'Subitem of' checkbox is unchecked. The 'This service is used in assemblies or is performed by a subcontractor or partner' checkbox is unchecked. The 'OK', 'Cancel', 'Custom Fields', and 'Spelling' buttons are on the right.

QuickBooks Job Type Item

Each job type must also have a payroll item associated with it. In QuickBooks, these payroll items are assigned to an expense account. Some employees may have multiple job types throughout the week; both AmigoPOS and QuickBooks support multiple job type tracking for a single employee.

Sales | Payments | Sales Tax | Job Types | Default Items

QuickBooks Payroll Item Expense Account: Payroll Expenses

Select the QuickBooks Job Type that corresponds to the Amigo Point of Sale Permission

	Item Type (Amigo)	Job Type (QuickBooks)	QB Payroll Wage Reference
▶	Assistant Manager	Assistant Manager	Assistant ManagerWageRef
	Bartender	Bartender	BartenderWageRef
	Bus Person	Bus Person	Bus PersonWageRef
	Cashier	Cashier	CashierWageRef
	Chef	Chef	ChefWageRef
	Cook	Cook	CookWageRef
	Dishwasher	Dishwasher	DishwasherWageRef
	Driver	Driver	DriverWageRef
	Food Prep	Food Prep	Food PrepWageRef

QBI Job Type Item Assignments

Employees with identical jobs may be compensated at a different rate. Adjust the pay rate for individual employees in QuickBooks by double-clicking on the employee name to open the employee editor. Select Payroll and Compensation Info from the drop-down list and modify the values for payroll item and Hours/Annual Rate.

**Edit Employee**

Information for: Albert Einstein

Change tabs: Payroll and Compensation Info

**Payroll Info**

Earnings

Item Name	Hourly/Annual Rate
< Add New >	

Assistant ManagerWageRef  
BartenderWageRef  
Bus PersonWageRef  
CashierWageRef  
ChefWageRef  
CookWageRef  
DishwasherWageRef  
DriverWageRef  
Food PrepWageRef  
General ManagerWageRef  
HostessWageRef  
Restaurant OwnerWageRef  
ServerWageRef  
SupervisorWageRef

What is a payroll schedule?

Payroll Schedule

Pay Frequency Biweekly

Employee is inactive

Taxes...  
Sick/Vacation...  
Direct Deposit

Order Business Cards

QuickBooks Payroll Items

## 27.3 Daily Sales Receipt

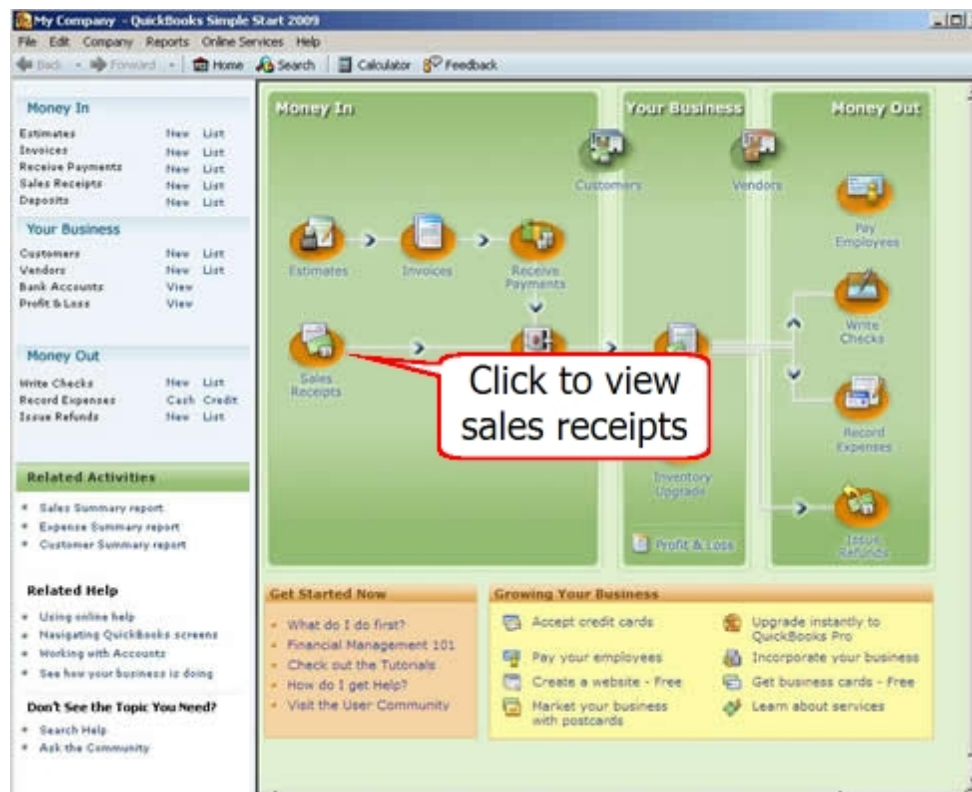
The daily sales receipt contains a summary of a sales totals, payment totals, sales tax, cash payouts, discounts and cash discrepancy items. These items are always in balance so that the receipt total is zero. Sales receipts are available in QuickBooks by selecting Company - Home Page or Company - Company Snapshot. Sales receipt are also available under Customers - Enter Sales Receipts.

Each sales receipt contains the customer, class (if used) and date. The date does not indicate the business day for the sales data, but the date that the receipt was created. Refer to the Memo field for the exact starting and ending Date/Time used to calculate the sales data.

The sales receipt displays a line item for each of the following AmigoPOS item types where sales are greater than zero for the specified business day:

- Regular Menu Item
- Regular Menu Optional
- Miscellaneous Item
- Retail Item
- Bar Menu Item
- Bar Menu Optional
- Pizza Menu Item (Size, Style, Ingredient & Prep Item)
- Gift Card Sales
- Delivery Charge
- Take Out Container
- Bottle Deposit
- Customer Account Payment

Sales receipt may be viewed by clicking Customers - Enter Sales Receipts in QuickBooks Pro or Enterprise Editions or by clicking the Sales Receipts shortcut in QuickBooks SimpleStart Edition.



QuickBooks Simple Start Sales Receipt Shortcut

**Payment Type** totals are also itemized, but the amount is always negative. Credit card sales are grouped by card type: Visa, MasterCard, American Express and Discover. Other card type totals are displayed on the Unknown Card Type line. Unknown cards may include credit card transactions that are entered manually using the on-screen keypad, private label cards or some cards used in the United Kingdom.

The **Sales Tax** collected is shown on up to three separate lines, one for each sales tax group. Sales tax is not used in the Cash Over/Short calculation when VAT tax is used, since the tax is included in the price of the item. Refer to the [QuickBooks item types](#) help topic for additional information.

**Cash Paid Out** summary is also shown on a separate line and is a negative amount.

**Discounts** are totalled on a separate line as a positive amount.

The **Cash Discrepancy** is calculated as follows:

$$\text{Total Transactions} - \text{Total Sales} + \text{Discount Total} + \text{Paid Out Total}$$

where Sales tax is added to total sales only if VAT tax is not used.



**Enter Sales Receipts**

Previous Next [Icons] Spelling History Get Online Pmts [Icon]

Customer: Job Class  
 Whistlin Willy's Downtown

Template Print Preview  
 Custom Sales Receipt

**Sales Receipt**

Sold To

Date 12/26/2008 Sale No. 250

Check No. Payment Method

Item	Description	Class	Qty	Rate	Amount	Tax
Regular Menu Item	Regular Menu Item Sales	Downtown		770.00	770.00	Non
Regular Menu Optional	Regular Menu Optional Sales	Downtown		2.00	2.00	Non

Customer Message Tax Out of State (0.0%) 0.00

Total 0.00

☒ To be printed ☐ To be e-mailed Customer Tax Code Non Memo 11/18/2008 7:00:00 AM - 11/19/2008 6:59

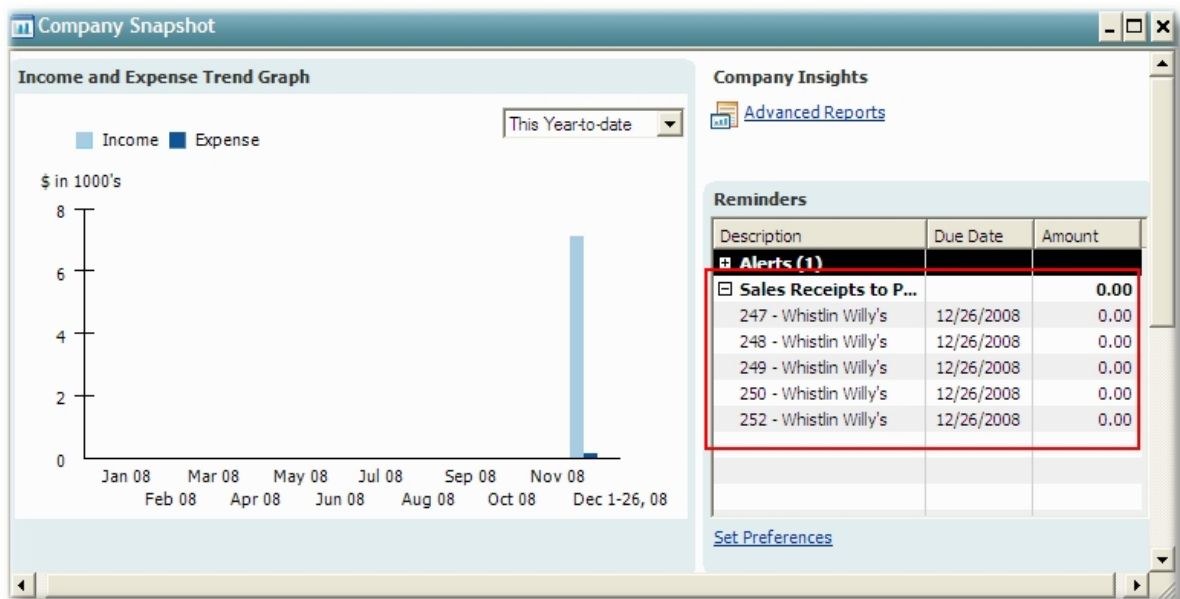
Add Time/Costs...

☐ Process credit card payment when saving

Save & Close Save & New Revert

QuickBooks Sales Receipt

Sales receipt appear on the QuickBooks Company Snapshot only if the box is checked next to *Add Sales Receipts to QuickBooks Receipts to Print list* on the AmigoPOS QBI main settings screen. This setting is useful if printed copies are required on a daily basis.



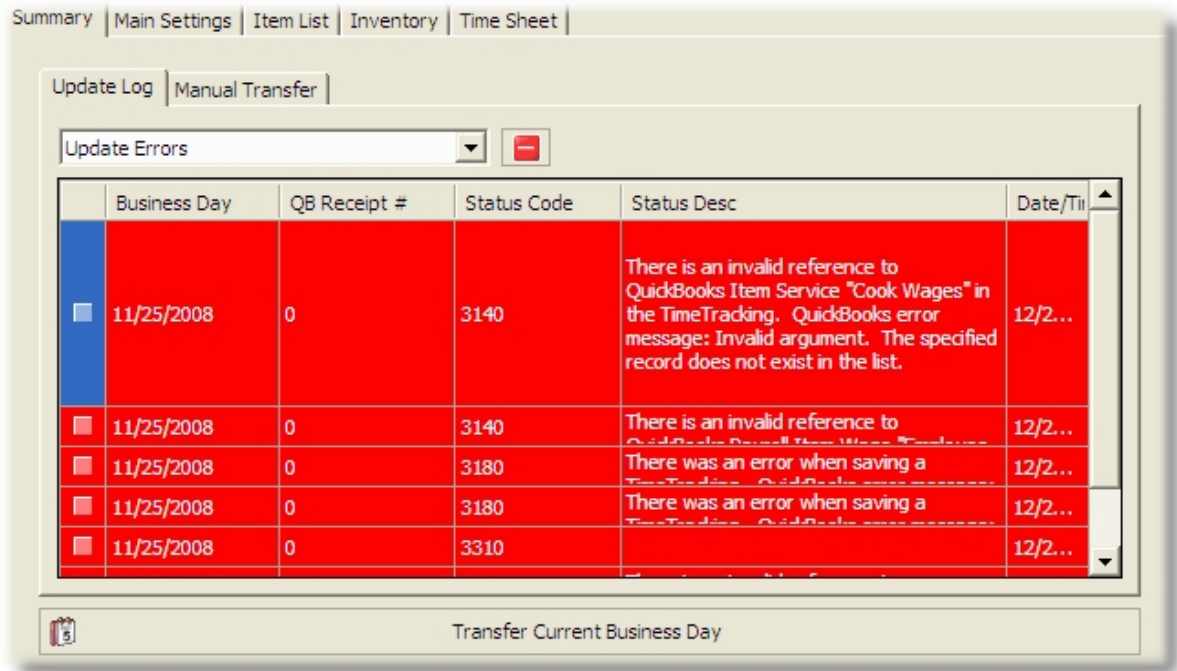
QuickBooks Company Snapshot

The sales receipt is assigned a unique numeric id by QuickBooks and stored in the AmigoPOS QBI Summary Update Log. The sales receipt can be deleted in QuickBooks by clicking CTL-D, or can be deleted directly from the AmigoPOS QBI by checking the box next to the entry and clicking the red delete button at the top. Note that deleting a sales receipt directly in QuickBooks does not remove the receipt from the AmigoPOS QBI update log. Deleting the receipt in the AmigoPOS QBI removes it both from the AmigoPOS QBI update log and QuickBooks. Note that only the most recent 90 log entries are shown. Log entries can be deleted to reduce the size of the AmigoPOS database. After deleting log entries, compact the database to recover the space. A QB Receipt # of 0 indicates that no data was transferred on for the business day.

Update Log		Manual Transfer				
All Updates						
	Start Bus Day	End Bus. Day	QB Receipt #	Status Code	Status Desc	Date/Time
<input checked="" type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...
<input type="checkbox"/>	1/3/2009	1/3/2009	0	0	Status OK	1/4/2009 ...

QuickBooks Update Log

All successful transfers will have a status code = 0. If an error occurs during the transfer process, the status code column contains a 4-digit number and the row is highlighted in red. Expand the row height to view the entire error description, or note the date/time of the error and refer to the status log for the QuickBooks XML response received after the error occurred. Most errors are caused by duplicate item names or missing item names. Refer to the [troubleshooting](#) help topic for a list of common errors.



QuickBooks Update Log

When automatic updating is disabled, the current days sales may be transferred by clicking the *Transfer Current Business Day* button at the bottom of the update log screen. Click Yes at the prompt to transfer the current day's sales activity.

If sales data exists that has not yet been transferred to QuickBooks, click the Manual Transfer tab to specify a date or date range to transfer. Note that each transfer may take up to 2 minutes and selecting to transfer a large number of days will require sufficient time to complete. Do not use or attempt to exit the AmigoPOS QBI while the transfer is taking place. The status log and toolbar will display frequent messages to indicate the current status of the transfer.

Update Log | Manual Transfer

Select the date(s) to transfer to QuickBooks


☒ Combine all days on a single sales receipt


January, 2009							February, 2009							March, 2009						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3	1	2	3	4	5	6	7	1	2	3	4	5	6	7
4	5	6	7	8	9	10	8	9	10	11	12	13	14	8	9	10	11	12	13	14
11	12	13	14	15	16	17	15	16	17	18	19	20	21	15	16	17	18	19	20	21
18	19	20	21	22	23	24	22	23	24	25	26	27	28	22	23	24	25	26	27	28
25	26	27	28	29	30	31								29	30	31	1	2	3	4
														5	6	7	8	9	10	11

☐ Today: 1/4/2009

*Click and drag to select a date range*

**Date Selection: 1/3/2009 4:46:32 PM**

 Transfer Current Business Day

 Transfer  
1/3/2009 7:00:00 AM - 1/4/2009 6:59:59 AM

QBI Manual Transfer

## 27.4 Time Sheet Data

Note that **QuickBooks Simple Start Edition does not support time sheet data**. This feature is available only to QuickBooks Pro Edition and QuickBooks Premier Edition users. If attempting to add time sheet records to QuickBooks Simple Start Edition, an error with status code 3250 will result.

The AmigoPOS QBI has the ability to transfer time sheet data along with daily sales totals. Before enabling this feature, ensure that all employees have been added to the QuickBooks employee list. To add a new employee to QuickBooks, select Employees - Employee Center and click CTL-N to open the **New Employee** dialog, as shown below.

QuickBooks New Employee Dialog


Note on employee names: The QuickBooks employee name must match the AmigoPOS employee name. Although AmigoPOS uses a database index to allow employees with duplicate names to exist, QuickBooks does not allow the use of duplicate employee names. The full employee name is shown at the top of the dialog window (shown above highlighted in red), and must be identical to the first, middle and last name in AmigoPOS. To eliminate errors, the recommended method of adding new employees is to check the box next to **Add new employees to QuickBooks before each update** on the AmigoPOS QBI Time Sheet screen, as shown below. Any AmigoPOS employee that does not exist in QuickBooks will appear on the data grid. Time sheet data cannot be transferred until these employees are added to QuickBooks.

Summary | Main Settings | Item List | Inventory | Time Sheet

☒ Enable Amigo Point of Sale to QuickBooks Time Data Sharing

Summary | Employees

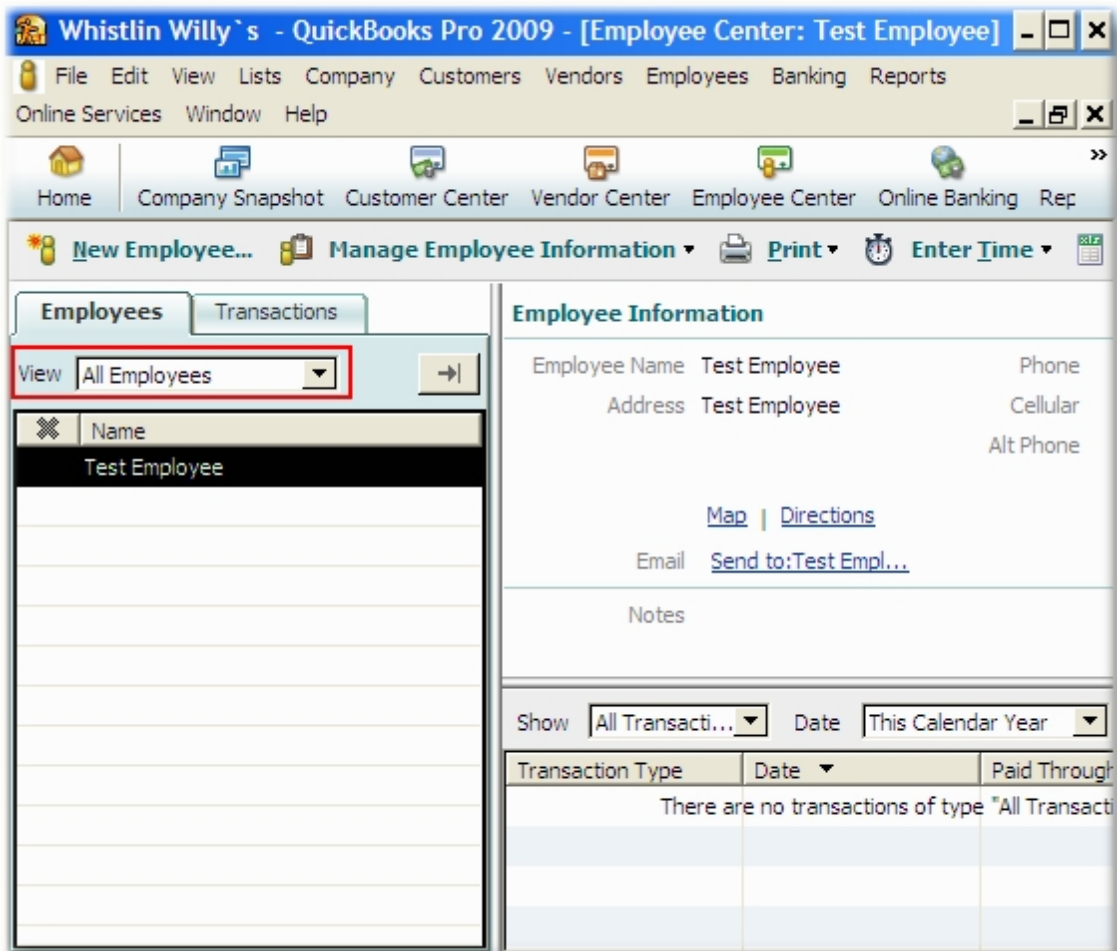
☒ Add new employees to QuickBooks before each update

New Employees 

Employee	Job Type	Shift Start	Shift End
----------	----------	-------------	-----------

QBI Time Sheet Screen

Disabled employees are added to QuickBooks with the inactive flag set to true. Inactive employees are visible only when the view is changed from Active Employees to All Employees, as shown below.



QuickBooks Employee Editor

The time sheet for any employee is editing by selecting Employees - Enter Time - Use Weekly Time Sheet. Select the employee from the drop-down list and use the arrow keys to navigate. Employees with multiple job types may have multiple entries in a single day if the work more than one shift with different job types. The employee's QuickBooks job type (AmigoPOS permission) appears under the Service column. QuickBooks stored time data by total time (Hours - Minutes). For reference, the AmigoPOS QBI will also send the shift start and end times, which are listed under the Notes column.

For multiple location businesses, the Customer:Job column contains a unique customer (location) name, which allows the same employee to work at multiple locations. Note that the employee name must be identical in AmigoPOS back office at each location, but should only be entered in QuickBooks once.

**Weekly Timesheet**

Previous Next Print Edit: Single Activity Let Your Employees Enter Time...

Name Test Employee

Week Of Nov 17 to Nov 23, 2008

Customer:Job	Service I...	Payroll Item	Notes	M 17	Tu 18	W 19	Th 20	F 21	Sa 22	Su 23	Total	Billable?
My Restaurant	Server	ServerWage...	11/17/2008 6:59:39 PM - 11/17/2008 2:29:40 PM	7:30							7:30	<input checked="" type="checkbox"/>
My Restaurant	Server	ServerWageRef	11/19/2008 6:59:39 PM - 11/19/2008 11:59:40 PM			5:00					5:00	<input checked="" type="checkbox"/>
My Restaurant	Server	ServerWageRef	11/21/2008 6:59:48 PM - 11/21/2008 10:53:49 PM					3:54			3:54	<input checked="" type="checkbox"/>
Totals				7:30	0:00	5:00	0:00	3:54	0:00	0:00	16:24	

☒ Wrap text in Notes field

Copy Last Sheet Save & Close Save & New Revert

QuickBooks Time Sheet Editor

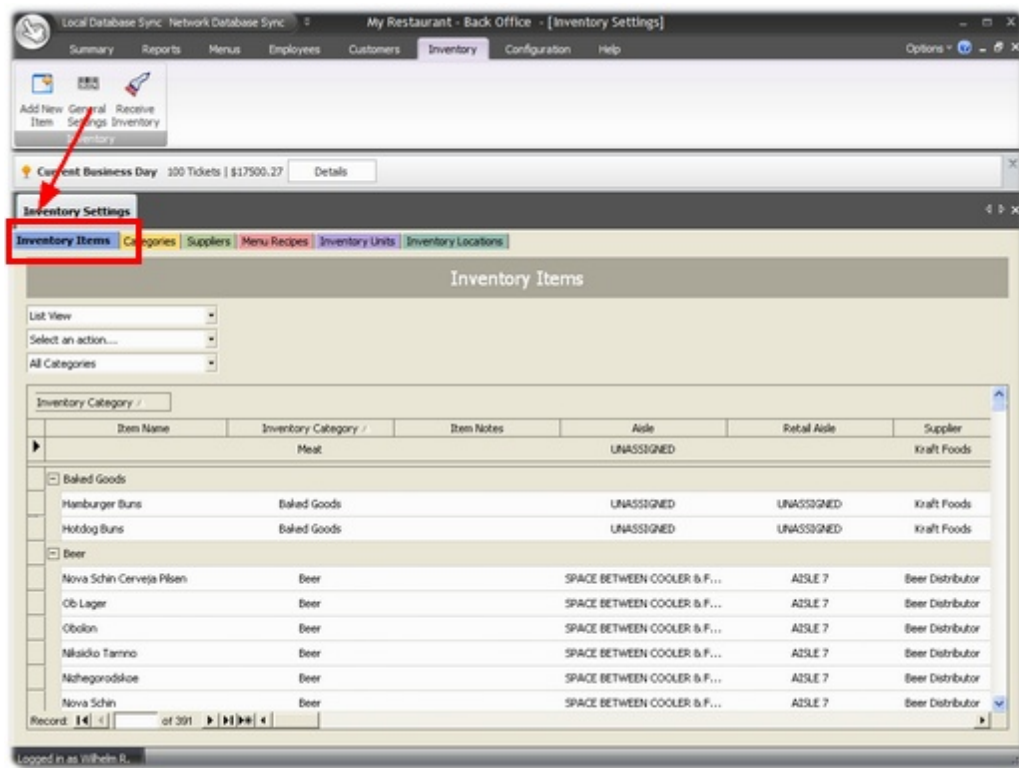
## 27.5 Inventory

Note that **QuickBooks Simple Start Edition does not support inventory data**. This feature is available only to QuickBooks Pro Edition and QuickBooks Premier Edition users. If attempting to add time sheet records to QuickBooks Simple Start Edition, an error with status code 3250 will result.

AmigoPOS tracks inventory usage by deducting the amount used per each menu item based on the totals entered for the menu item recipe.

Each inventory item must be added to QuickBooks. AmigoPOS allows duplicate inventory item names, but QuickBooks uses the inventory item name as a database index and each name must be unique. This may cause issues if your inventory list in AmigoPOS contains duplicate name entries. In AmigoPOS back office, select Inventory - General Settings and verify that there are no duplicates.





AmigoPOS Inventory Items

To add a new payment item to QuickBooks, open the Item List and click CTL-N. Select **Inventory Part** from the drop-down list, select the **Food Inventory** as the Asset Account, **Cost of Goods Sold** as the Income Account, **Cost of Good Sold** as the COGS Account, enter the unit quantity (not case quantity) for the Reorder Point, select the payment method and enter a unique name.

Note: When entering inventory items directly in QuickBooks, all inventory items must be assigned to the same Asset Account for the AmigoPOS QBI inventory exchange to function properly. This account is specified in the AmigoPOS QBI under the Inventory tab.

**Edit Item**

Type: Inventory Part Use for goods you purchase, track as inventory, and resell.

Item Name/Number: Burger Patties (1/... ☐ Subitem of Manufacturer's Part Number: 77651

**Purchase Information**

Description on Purchase Transactions:

Cost: 0.50

COGS Account: Cost of Goods Sold

Preferred Vendor:

**Sales Information**

Description on Sales Transactions:

Sales Price: 0.00

Tax Code: Tax

Income Account: Cost of Goods Sold

☐ Item is inactive

**Inventory Information**

Asset Account	Reorder Point	On Hand	Avg. Cost	On P.O.
<span>Food Inventory</span>	<span>25</span>	50,033	2.00	0

Buttons: OK, Cancel, Custom Fields, Spelling

QuickBooks New Item Dialog

Most users will have the inventory entered in AmigoPOS but not in QuickBooks. Press the **Export to QuickBooks** button to transfer the inventory items (and current quantity on hand) to QuickBooks. Some users may have the inventory entered into QuickBooks but not AmigoPOS. In that case, press the **Import from QuickBooks** button to transfer the inventory items list from QuickBooks to AmigoPOS. Ensure that both the COGS account and Asset account defaults are valid or the transfer will fail. AmigoPOS inventory items that are already in the QuickBooks items list will be ignored by QuickBooks, generating an error message in the update status log for each duplicate item.

Note: Exporting a large inventory list from AmigoPOS to QuickBooks may take up to 5 minutes. Do not interrupt the process or use QuickBooks while the export is in progress.

QBI Inventory Editor

If necessary, you may adjust the QuickBooks quantity on hand of individual inventory items by clicking the Adjust tab. Select the inventory item from the drop-down list and enter the quantity. The quantity entered can either replace the current quantity on hand or increase the current quantity on hand. Check the box to add the value to the current quantity or leave the box unchecked to replace the current quantity. Click the Add to List button and add additional items if required. Press the Execute button at the bottom of the screen to complete the update. Note that QuickBooks should not be reunning when this function is used, or error.

QBI Inventory Adjustment

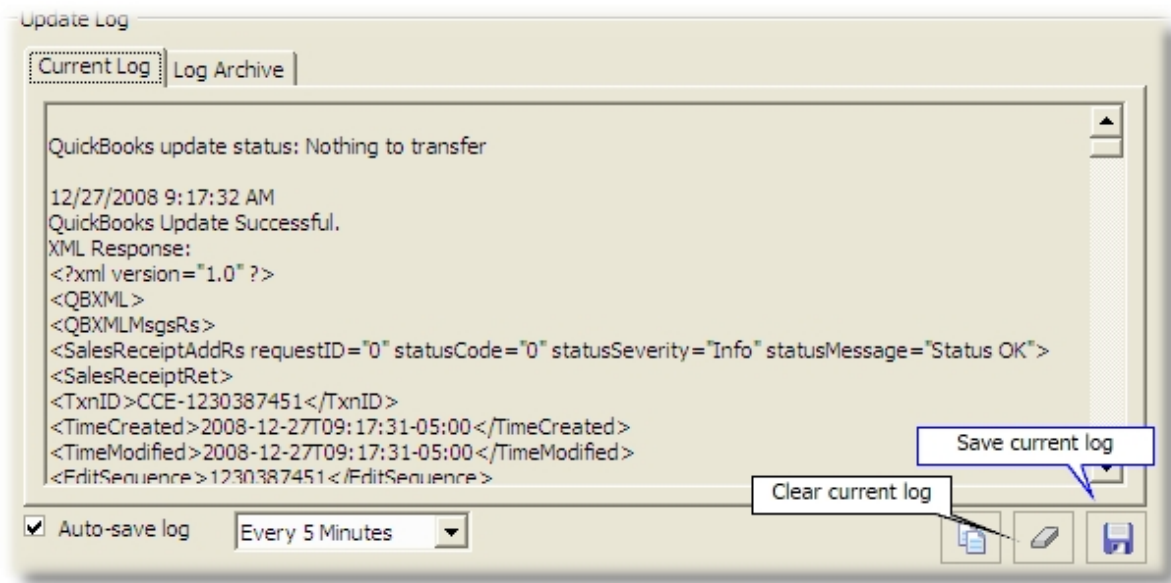
During the daily sales transfer to QuickBooks, the AmigoPOS QBI will send the current business day's usage to QuickBooks so that the QuickBooks Qty on Hand value is decreased by the daily usage in AmigoPOS. When transferring sales data manually, the inventory transfer is ignored. Inventory data is transferred only when the current business day's sales are transferred to QuickBooks, since the QBCurrentDayUsage field in the AmigoPOS inventory items table is reset to zero after the transfer to QuickBooks.

## 27.6 Troubleshooting

The AmigoPOS QBI log files provide a record of each transfer. The QuickBooks XML response is displayed in raw text format with the time/date, status code and status message preceding the event record. Successful transfers will have a status code = 0, all other transfers contain a 4 digit status code with a descriptive error message. Refer to the [QBI](#)

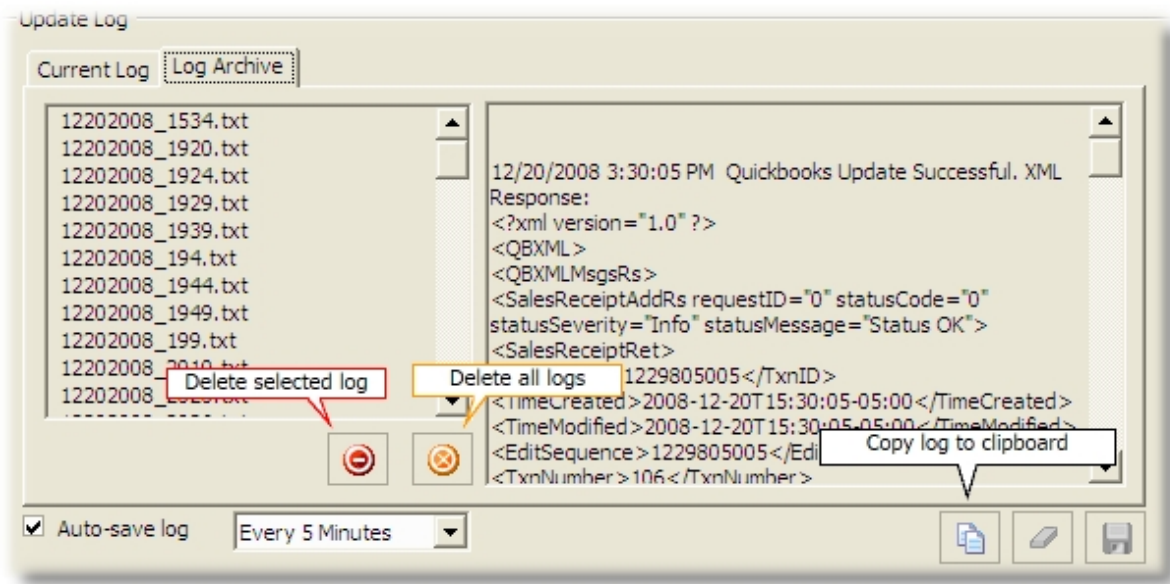
[Status Codes](#) <sup>1032</sup> help topic for an explanation of each status code. The log file can be saved automatically at a user-defined interval by checking the Auto-Save log box. The update log is saved as a plain text file in the Application\Logs\ directory, i.e. C:\Program Files\AmigoPOS\Logs. The file named consists of the date and time and can be opened using any text editor. Each file is very small and disk space usage is inconsequential. The file can be attached to a support email, if necessary. The display is cleared each time the current log file is saved. The display can be manually cleared by clicking the Clear button and the current update log can be manually saved by clicking the Save button as shown below.

Note that log files are also used by the Credit Card Batch, End of Day and Remote Data modules of the AmigoPOS QBI. Status updates and errors from each may appear in the same log file. QuickBooks log entries are easy to spot since they are generally in XML format. Setting the Auto-Save log time to a low value is recommended to keep log file entries confined to results and errors from one or two modules.



Current Update Log

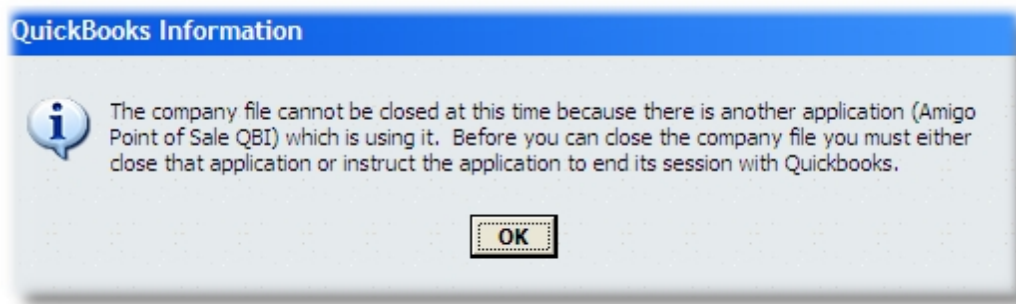
Click the Log Archive tab to view saved log files. Past logs are shown on the left side, ordered by date/time. Click on any log to view the text. The text can be copied to the Windows clipboard for pasting into an email or support ticket.



Update Log Archives

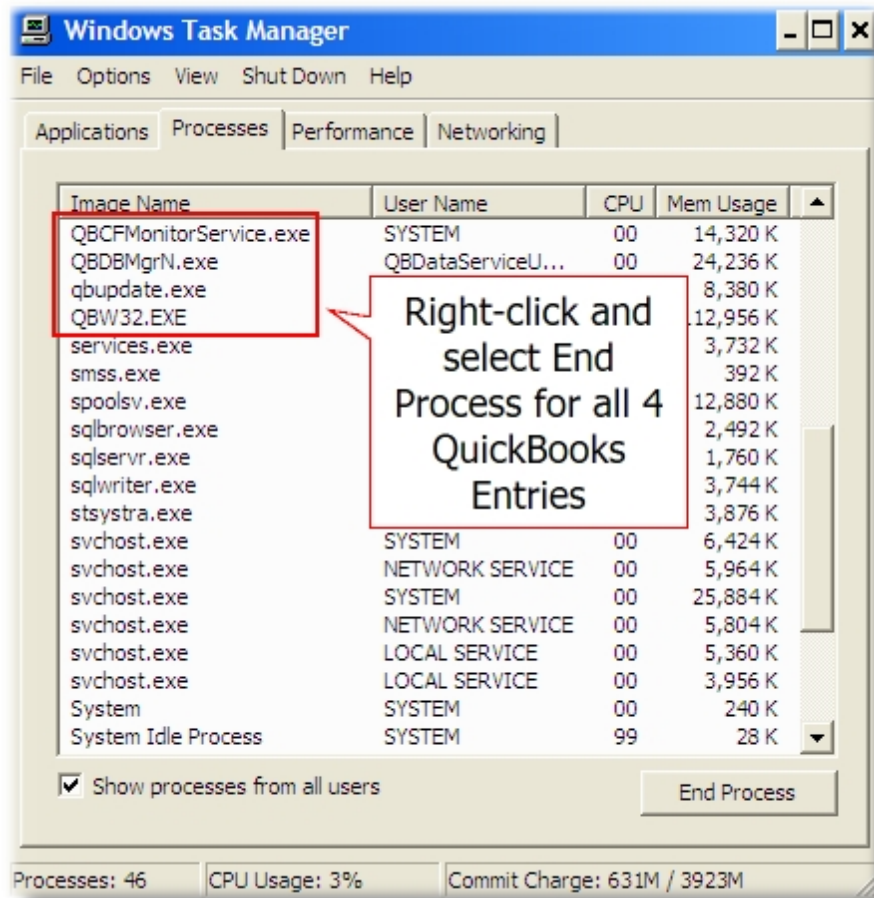
Most errors are caused by duplicate item names, non-existent items (possibly due to misspelling), or insufficient permissions granted to QBI in QuickBooks. The [QuickBooks 2008 Knowledge Base Search](#) provides a valuable source of information for QuickBooks related issues.

In the event of a serious error or if an active QuickBooks transfer is interrupted, the AmigoPOS QBI may abort the transfer instead of crashing. In that case, the following screen may appear when you try to start/shut down QuickBooks or reboot the PC. The QuickBooks company file is locked by QuickBooks and QuickBooks must be shut down to release the file. To prevent this error from occurring, never interrupt a QBI to QuickBooks transfer by attempting to use other parts of the AmigoPOS QBI. Large transfers, such as many inventory items or sales data for multiple business days, may take several minutes to complete.



QuickBooks Error Dialog

To manually shut down QuickBooks, right-click anywhere on the task bar and select Task Manager. Click the Image Name column heading so that all processes appear in alphabetical order and end the four QuickBooks processes by right-clicking on each entry and selecting **End Process**.



Windows Task Manager

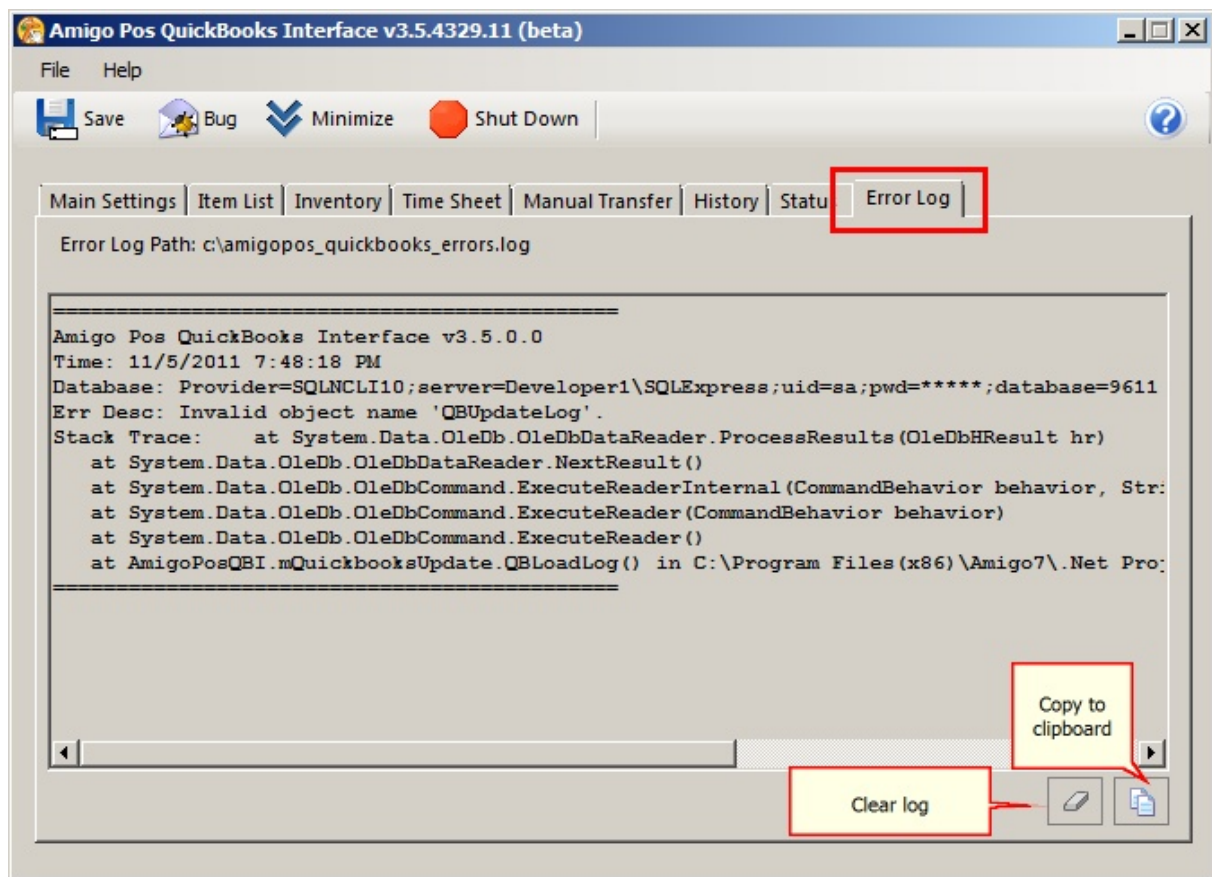
### 27.6.1 Error Log

The QuickBooks Interface error log provides detailed error descriptions including the program version, time/date stamp, detailed error message and stack trace information. Any error that occurs when the QuickBooks Interface attempts to connect to the AmigoPOS database or when the QuickBooks Interface attempts to transfer data to the QuickBooks company file is recorded in the error log. The contents of the log can be copied to the Windows clipboard to paste into a support ticket if necessary.

The error log is a plain text file stored at [c:\amigopos\\_quickbooks\\_errors.log](#). If the error log file grows to larger than 200kb, the file is automatically renamed with the extension .M.D.YYYY.HH.MM.bak.log (i.e. [amigopos\\_quickbooks\\_errors\\_1152011\\_2023.log.bak](#)) and a new error log file is started to prevent delays when loading the log. Click the Clear Log button to permanently delete the error log.

The image below displays an error log with a single entry (indicating a missing table error that occurs when SQL Server migration is not successful). Typical errors include invalid database path, missing SQL Server Native Client or insufficient permissions to open the QuickBooks company file.





QuickBooks Interface Error Log

## 27.6.2 QBI Status Codes

## 27.6.3 Common Errors

Most data exchange errors are caused by invalid data and can be corrected by referring to the messages shown in update status log under the "Status" tab.

For example, QuickBooks will return an error code when attempting to add an employee with an invalid state. If a state is entered in **Back Office>Employees>Employees List**, it should be a 2-letter uppercase and the correct abbreviation, i.e. for Texas enter TX. When attempting to send an employee with an invalid state, the error code returned by QuickBooks is 3110 and the error message is "The enumerated value 'Texas'; in the field 'state'; is unknown or invalid for the qbXML version in use." If state information is not required, the AmigoPOS back office field should be blank.

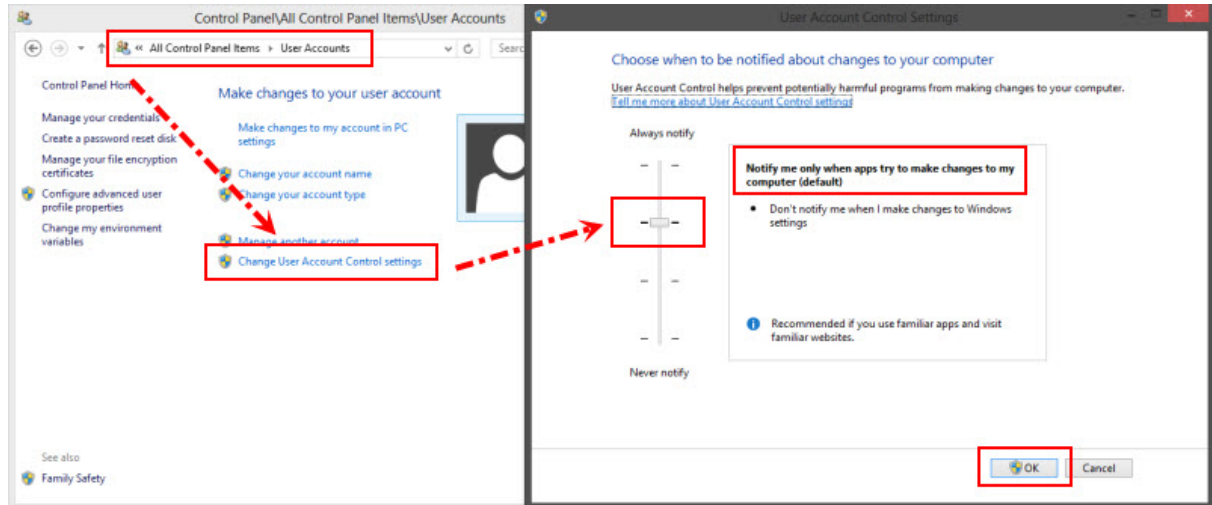
Another common error is attempting to transfer time sheet information for an AmigoPOS employee that does not exist in QuickBooks. The error code return by QuickBooks is 3140 and the error message is "There is an invalid reference to QuickBooks entity 'Max Born' in the TimeTracking. QuickBooks error message: Invalid argument. The specified record does not exist in the list."

When using social security numbers, the number must be entered in the correct format, i.e. ###-##-#### or the new employee transfer will fail. If social security numbers are not used, the AmigoPOS back office field should be blank.

## 27.6.4 Windows Vista/7/8

Windows Vista/7/8 users must verify that UAC is enabled in Control Panel > User Accounts > User Account Control Settings. QuickBooks will not communicate with integrated applications (including the AmigoPOS QuickBooks interface) if UAC is disabled or set at a level lower than default. Always reboot after changing the UAC level. QuickBooks should not be set to start with elevated permissions; i.e. do not start QuickBooks as Administrator. In

addition, the AmigoPOS QuickBooks interface should not be set to start with elevated permissions; i.e. do not start the AmigoPOS QuickBooks interface as Administrator. Both applications should be running with normal (non-elevated) Windows user permissions.



**User Account Control Settings**

If changing the UAC does not resolve the connectivity issue, the error is most likely related to a "Session Start" failure, where the AmigoPOS QuickBooks interface cannot initiate a session with QuickBooks. First, verify that this is the cause of the error by opening the QuickBooks log file located at `C:\Users\All Users\Intuit\QuickBooks\qbsdklog.txt`. If the error description is "Begin Session Error", download and run the [QuickBooks SDK Diagnostic Tool](https://community.intuit.com/articles/1501884-fix-common-installation-errors-using-the-qbinstall-tool) from Intuit (the developer of QuickBooks) at <https://community.intuit.com/articles/1501884-fix-common-installation-errors-using-the-qbinstall-tool>. Follow the on-screen prompts to open QuickBooks, open the company file and allow access. If the diagnostic tool cannot connect to QuickBooks, the AmigoPOS QuickBooks interface will not be able to connect to QuickBooks. In the image below, the diagnostic tool displays an error because Windows 8 UAC is disabled. Correct the issue, reboot and run the diagnostic tool again until all bars are green.





Part 28

# Remote Display

## 28 Remote Display

### 28.1 Overview

The remote display application is included free with AmigoPOS 8 and is intended to replace the prep printer. Each prep printer can be replaced, or work in conjunction with a single remote display monitor. Each PC can support up to 5 monitors, with each monitor corresponding to a prep printer. When using bump bars (programmable keyboards), each monitor should be driven by a separate bump bar, so that 5 monitors on a single PC will use 5 bump bars connected to the same PC.

#### Typical System

Most resellers or vendors will obtain a Mini/Booksize "Barebone" system with no operating system installed. Companies such as [newegg.com](http://newegg.com) offer many choices. Select a system that contains a sufficient number of VGA or hdmi outputs with on-board lan and a dual-core Atom. The inexpensive Windows 7 Starter edition can be used (only available in 32-bit) or Windows 7 64-bit (any edition) can be used for slightly better performance. Windows 7 64-bit is recommended when using more than 3 monitors. In addition, verify that there are enough USB outputs to connect the bump bars/programmable keyboards. If not, obtain a USB hub. For best results, do not use wireless networking.

Any monitor can be used. Higher screen resolutions use more system resources but offer crisp text at a distance. The remote display application will automatically resize to any screen resolution and offers the ability to customize the text size for each monitor.

#### System Requirements

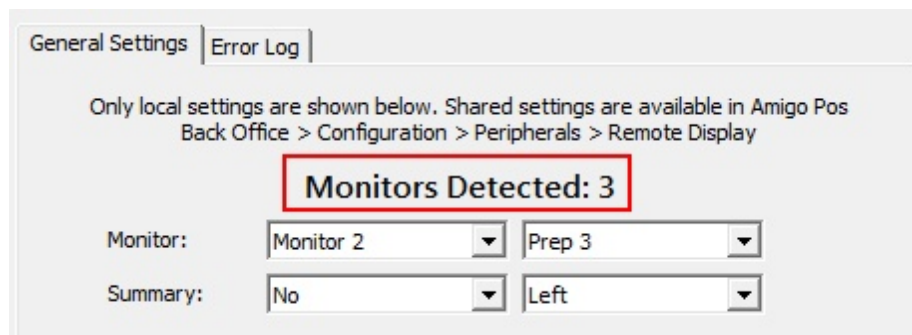
- **Supported Operating Systems:** Any version of MS Windows that supports .Net 4.0. Windows 7 recommended. The remote display application has not been tested on embedded operating systems
- **Processor:** 400 MHz Pentium processor or equivalent (Minimum); 1GHz Pentium processor or equivalent (Recommended). The remote display application will run on inexpensive atom mini computers and older Celeron processors.
- **RAM:** The remote display application consumes 32-64MB Ram depending on the number of monitors. The minimum memory requirements are determined by the operating system. In practice, 2GB is sufficient for a dual-core processor running Windows 7 64-bit.
- **Hard Disk:** Up to 50 MB of available space may be required
- **Display:** 800 x 600, 256 colors (Minimum); 1024 x 768 or better high color, 32-bit (Recommended)
- **Video Card:** Any integrated or external graphics card capable of driving 1 to 5 monitors.

#### Screen Resolution

The remote display application will automatically resize to fill the entire viewable area of the screen at program startup. Although it is capable of running at resolutions as low as 800x600px, 1024x768px or higher is recommended.

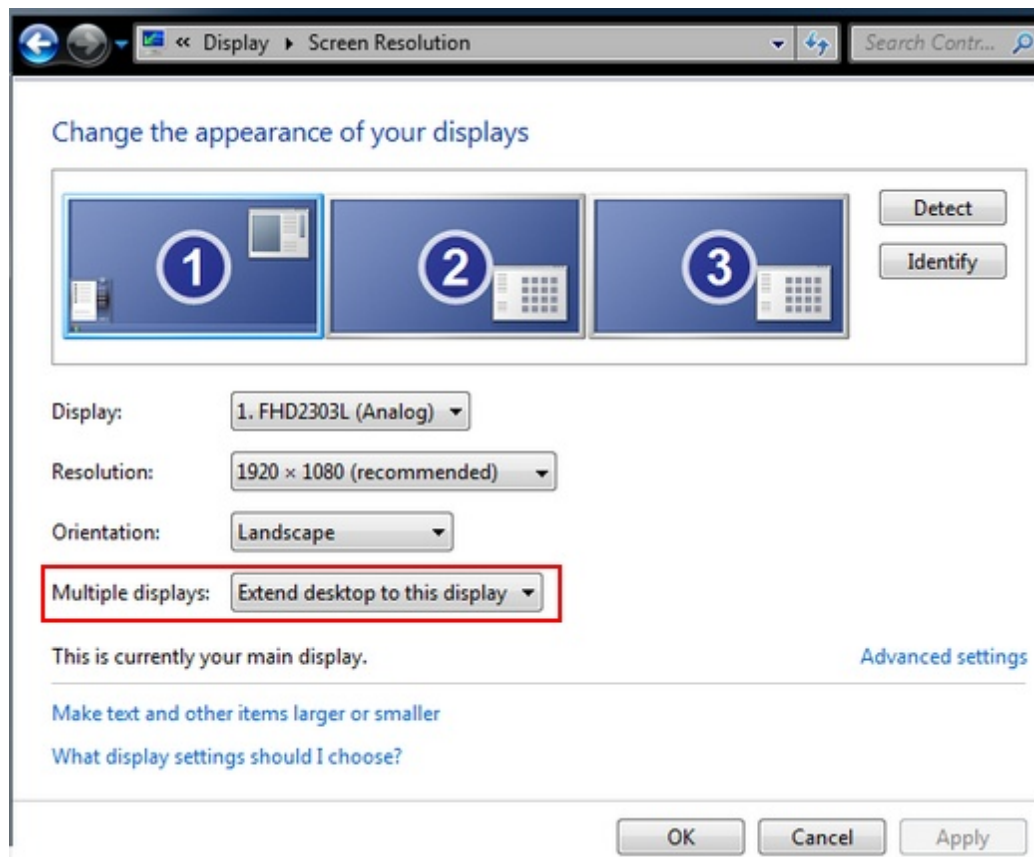
#### Available Monitors

The available monitors are determined by the operating system. Click the Settings button to verify that the remote display application has detected all connected monitors.



Monitor Detection on the Settings Screen

In the image below, 3 monitors are connected (as shown in the Windows Control Panel > Display Properties). After connecting the monitors, select **Extend desktop to this display** for each additional monitor as shown below.



Windows Control Panel > Display > Screen Resolution

### Installation

The remote display application is installed with AmigoPOS. A shortcut to the application is added both to the start menu shortcuts and desktop shortcuts folder.

### Configuration

Enable the remote display on any computer running back office by navigating to Back Office/Settings/Peripherals/Remote Display and setting the value for **Enabled** to **Yes**. The **Enabled** setting can be set

once at any pos stations and is shared by all pos stations. In addition, all screen and text appearance settings are shared by every remote display on the system.

#### Back Office Settings

- **Enabled:** Set to Yes to enable remote display(s)
- **Late Alert Minutes:** Minutes before late alert color is used (set to 0 to disable)
- **Late Color:** Late alert background color. Is used to replace the order type background color when an order is late.
- **Late Text Color:** Late alert text color. Is used to replace the order type text color when an order is late.
- **Menu Item Color:** Remote display menu item text color
- **Modifier Item Color:** Remote display optional text color
- **Screen Color:** Background color for remote display main screen
- **Screen Refresh Disable Interval:** Time in seconds to pause screen updates when the Previous, Next or Lock button is pressed
- **Screen Refresh Interval:** Time in seconds to pause between screen updates
- **Summary Color:** Background color of summary view
- **Summary Text Color:** Ticket color of summary view
- **Warning Alert Minutes:** Minutes before warning alert color is used (set to 0 to disable)
- **Warning Color:** Warning alert color for remote display main screen
- **Warning Text Color:** Warning alert text color for remote display main screen
- **Remote Displays In Use:** Enter the highest remote display id. This value is used to speed up order submission, similar to disabling prep printers that are not in use.
- **Sound:** System sound to play when a new order is added to the list

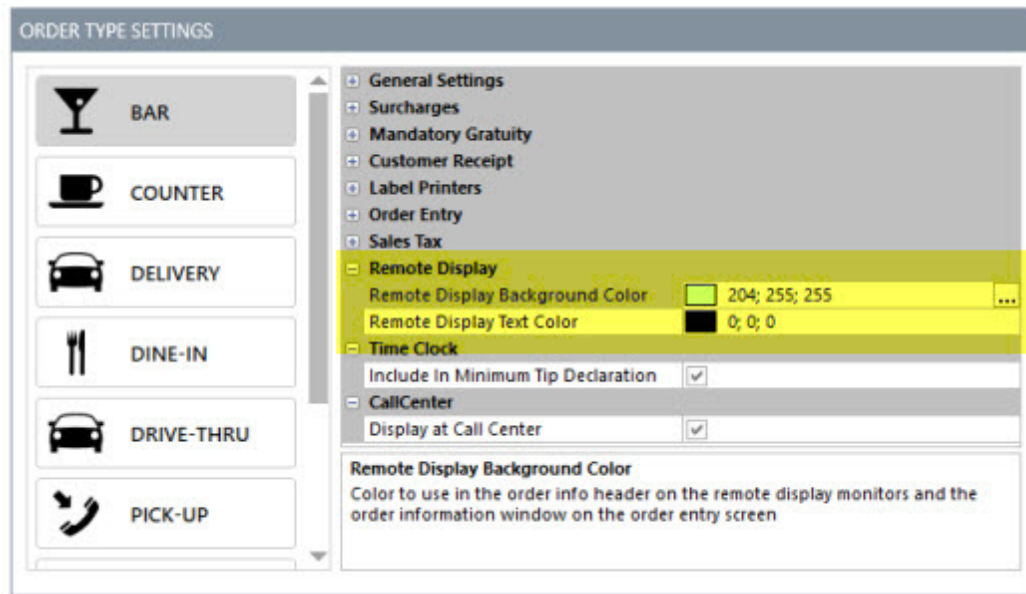


Remote Display Main Screen

For example, the settings for the screen above are:

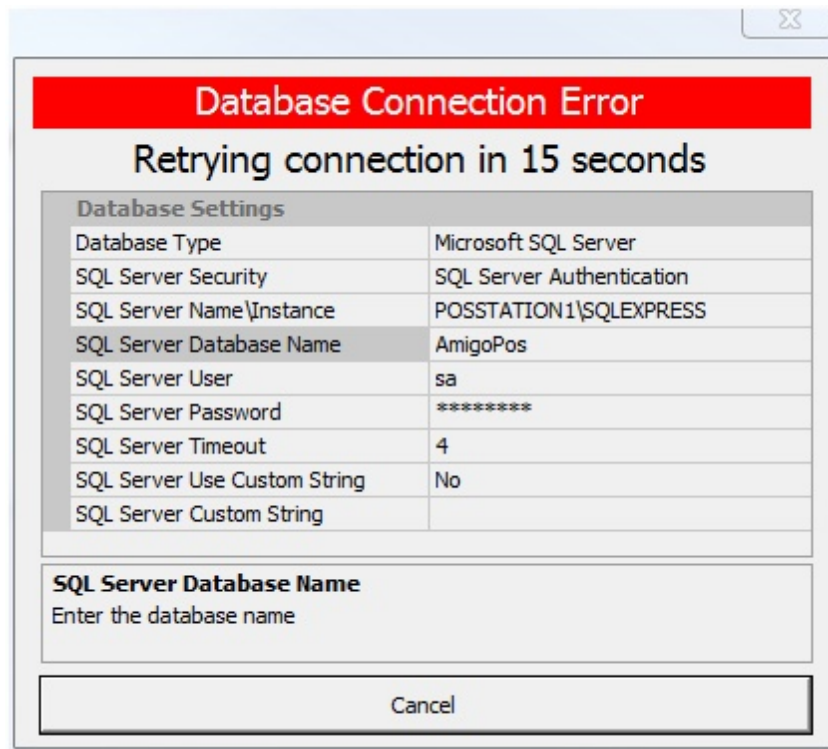
- **Late Color:** Red (shown in order #10)
- **Late Text Color:** White (shown in order #10)
- **Menu Item Color:** White
- **Modifier Item Color:** Red
- **Screen Color:** Black
- **Summary Color:** Black
- **Summary Text Color:** White
- **Warning Color:** Yellow (shown in order #20)
- **Warning Text Color:** Black (shown in order #20)
- **Remote Displays In Use:** Enter the highest remote display id. This value is used to speed up order submission, similar to disabling prep printers that are not in use.
- **Sound:** System sound to play when a new order is added to the list

In addition, each order type is assigned both a background color and text color on the [order types settings](#) <sup>967</sup> screen. In the image above, the COUNTER order type is shown with a white background and black text.



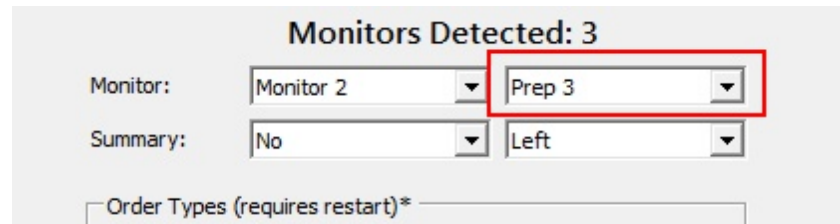
Remote Display Main Screen

Follow the procedure to set the [SQL Server connection string](#)<sup>625</sup> to connect to the database. The remote display application will use the same database settings as AmigoPOS. AmigoPOS does not have to be running when the remote display application is in use. If a database connection error occurs, a dialog appears and the connection will be automatically every 20 seconds. If a database connection error occurs, verify that the network is up and that the PC hosting the database is online.



Database Connection Error

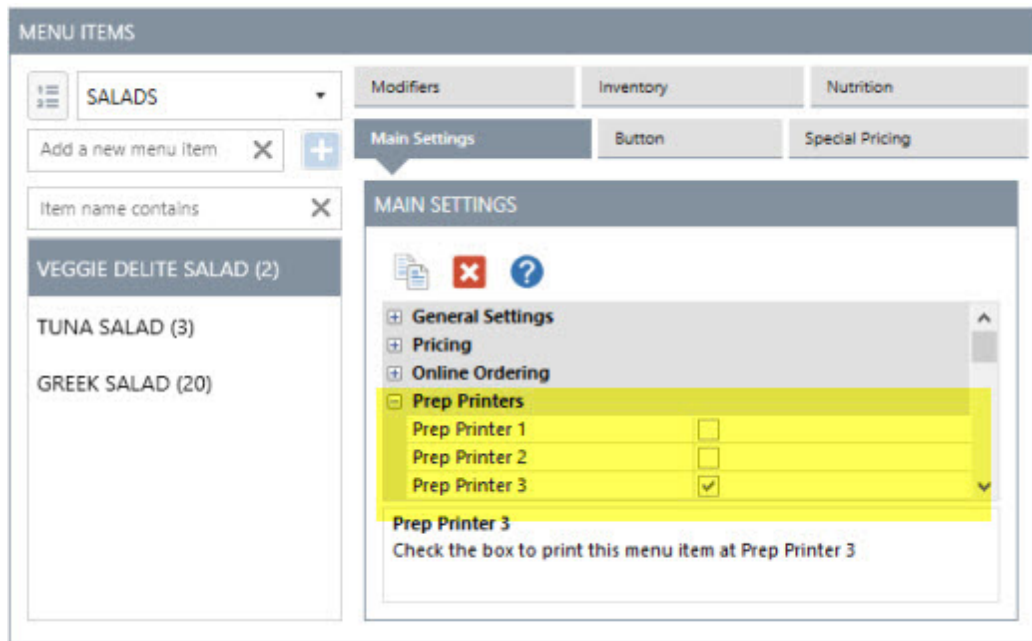
Each monitor is assigned a prep id, which corresponds to the Prep1, Prep2, etc fields in AmigoPOS Back Office menu configuration screens.



Remote Display Settings Screen

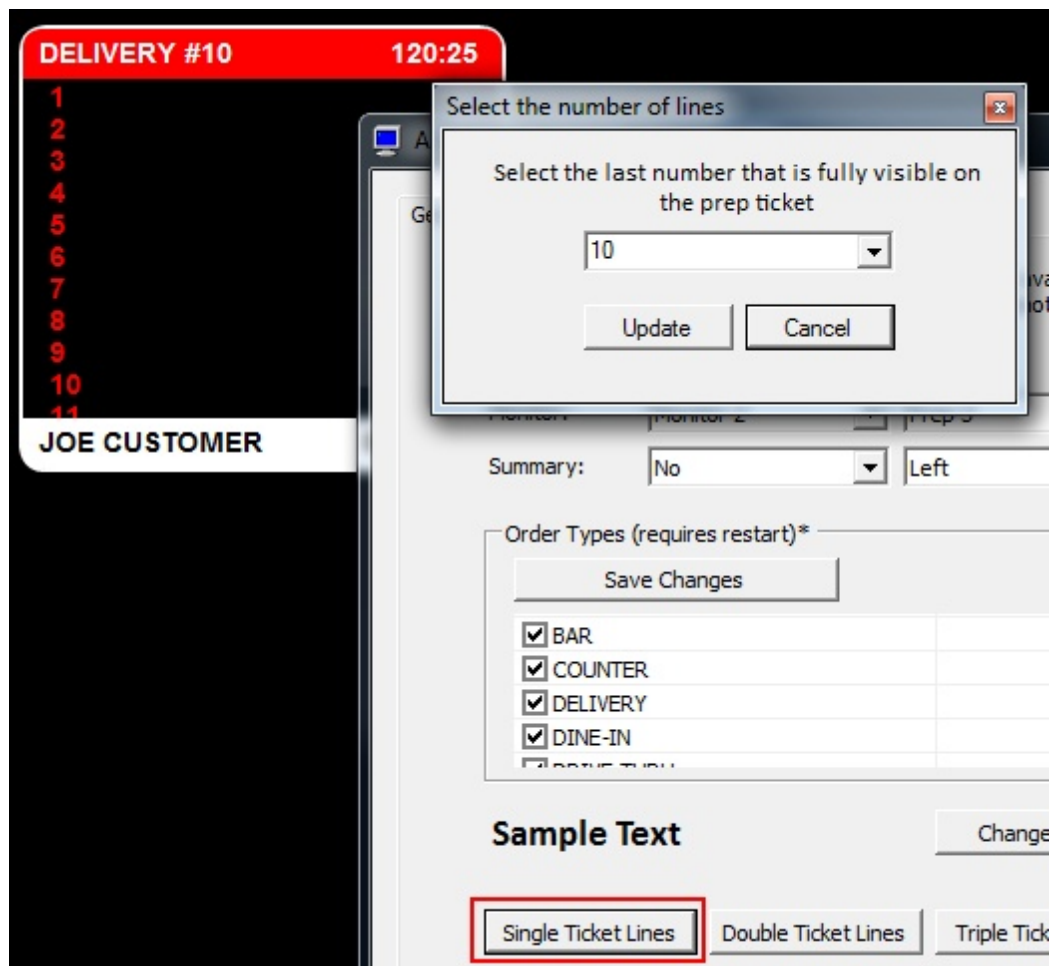
For example, the menu item shown in the image below is sent to any monitor designated as Prep 3.





**The menu item will appear on any monitor designated as Prep 3**

The text size, weight and font name can be customized for each monitor. Open the remote display settings screen and select the monitor from the drop-down list. Click the Change Text box and select the font name and style. Note that any font style other than Regular will be interpreted as bold font. The number of lines that appear on a prep ticket is determined by the font size and screen resolution. After the font is selected, click the Single Ticket Lines button and select the highest number that appears on the screen. For example, in the image below, only 10 lines are fully visible (the 11th line is obscured). Repeat this process for the Double and Triple Ticket Line buttons. Note that if an order is too long to appear on a triple length ticket, yellow arrows will appear at the bottom indicating that the remaining order items appear on the next ticket(s), as shown for order #10 in the 2nd image above. Additional settings include the ability to display specific order types and the ability to automatically display the summary screen at startup.



Setting the Number of Visible Lines

### Usage

Each remote display function is assigned a shortcut keys (or keystroke combination), but the display can also be used without a keyboard if a touchscreen monitor is used. Refer to the [bump bar help topic](#)<sup>[1043]</sup> for shortcut key assignments.



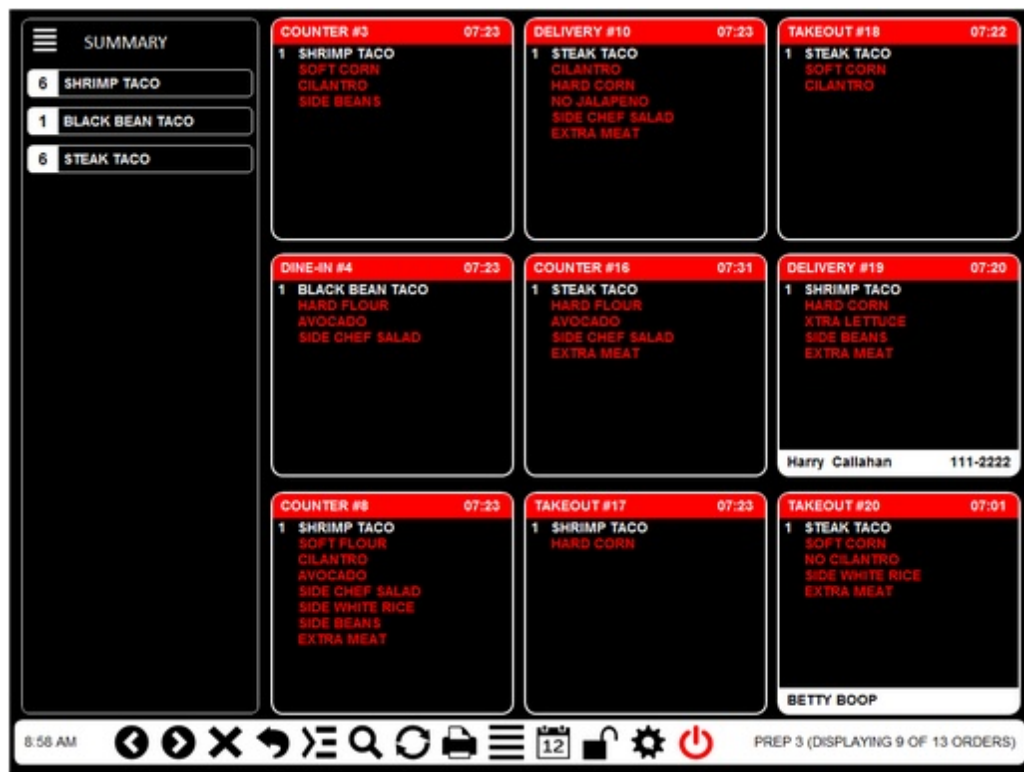
On-Screen Buttons

### On-Screen Buttons

1. **Right Arrow:** Select previous ticket
2. **Left Arrow:** Select next ticket
3. **X:** Bump ticket (order complete/remote from list)
4. **Back Arrow:** Un-bump the last ticket that was bumped
5. **Right Arrow List:** When more tickets are available than can be displayed on the screen at one time, move to next group of tickets

6. **Zoom:** Show details for the selected order. This feature is not available on the current release.
7. **Refresh:** Check for new orders and update the screen
8. **Print:** Reprint prep ticket. This feature is not available on the current release.
9. **Summary:** Show a list of menu items currently in the queue
10. **Scheduled Orders:** Show a list of orders that are scheduled for a future date/time. Scheduled orders are currently only available for the web ordering interface.
11. **Lock Screen:** Temporarily prevent the screen from refreshing
12. **Settings:** Show the settings screen. The same settings are available in back office at any pos station, with the exception of the Remote Display Id, which must be set locally
13. **Exit:** Shut down the remote display application

The image below is an example of a remote display monitor with 13 orders in the queue. The status displayed at the bottom indicates that the display is designated as Prep 3 and there are 13 orders in the queue but only 9 are visible. The summary at the left displays the total items for all orders, including the orders that are not visible on the screen. Nine orders are shown, but hiding the summary will show up to 3 additional orders. Press the right arrow button to view the remaining orders. Press the right arrow button a second time to return to the first screen.



Example with 9 Visible Orders & Summary

Press the summary button to hide the summary and display 3 additional orders on the screen. Note that the status shown at the bottom indicates that one order is not visible (12 of 13 are visible).



Remote Display with 12 Orders &amp; No Summary

## 28.2 Bump Bar

Although a keyboard or touch monitor can be used, a programmable electronic keyboard, membrane keyboard or bump bar is recommended for reliability and ease of use. Bump bars are generally very durable and spill resistant with extra large membrane buttons. A keypad/bump bar with 30 or more keys (or 15 keys with a configurable Shift button) is recommended to accommodate new functions as they are released.

Referring to the keypad's programming guide, use the following chart to program the required keystroke combinations:

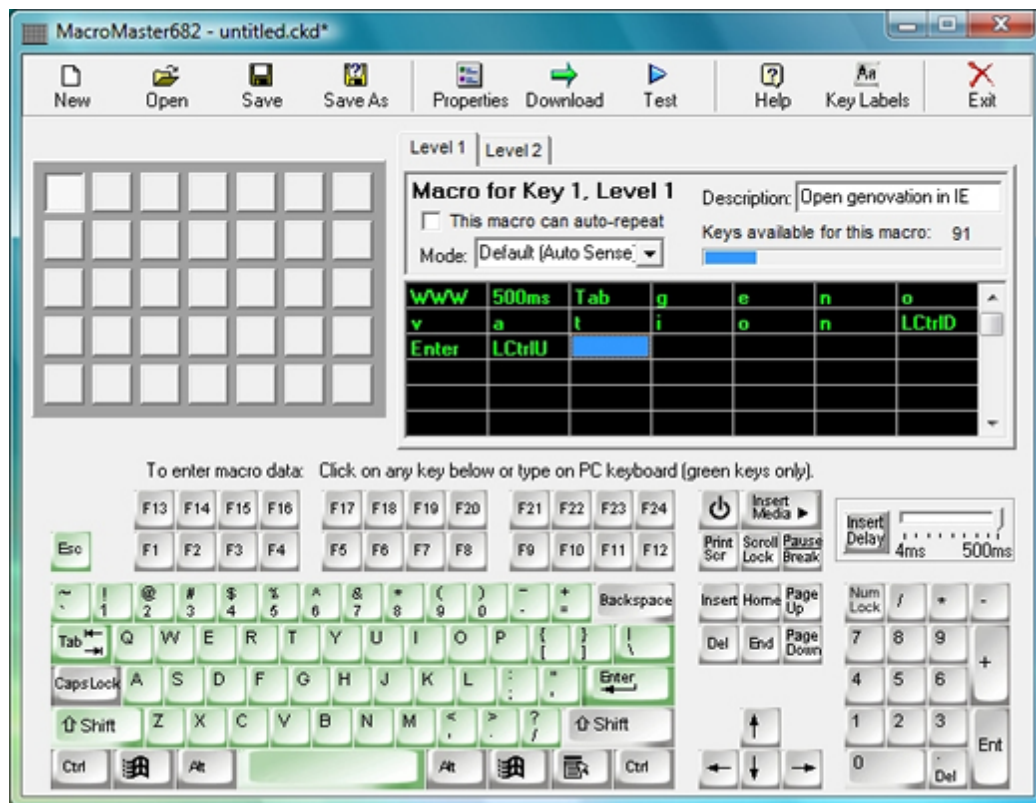
Function	Description	Monitor				
		1	2	3	4	5
Select Previous Ticket		Ctrl+Up	Ctrl+Alt+Up	Ctrl+Shift+Up	Alt+Shift+Up	Ctrl+Winkey+Up
Select Next Ticket		Ctrl+Down	Ctrl+Alt+Down	Ctrl+Shift+Down	Alt+Shift+Down	Ctrl+Winkey+Down
Bump Order	Remove the selected order from the list	Ctrl+B	Ctrl+Alt+B	Ctrl+Shift+B	Alt+Shift+B	Ctrl+Winkey+B
Unbump Order	Recall the last order that was bumped	Ctrl+U	Ctrl+Alt+U	Ctrl+Shift+U	Alt+Shift+U	Ctrl+Winkey+U

<b>Show Next Screen</b>	Show the next group of orders	Ctrl+Right	Ctrl+Alt+Right	Ctrl+Shift+Right	Alt+Shift+Right	Ctrl+Winkey+Right
<b>Show Order Details</b>	Display the order details	Ctrl+F	Ctrl+Alt+F	Ctrl+Shift+F	Alt+Shift+F	Ctrl+Winkey+F
<b>Refresh Screen</b>		Ctrl+R	Ctrl+Alt+R	Ctrl+Shift+R	Alt+Shift+R	Ctrl+Winkey+R
<i>Print Order</i>	<i>Not yet implemented</i>	<i>Ctrl+P</i>	<i>Ctrl+Alt+P</i>	<i>Ctrl+Shift+P</i>	<i>Alt+Shift+P</i>	<i>Ctrl+Winkey+P</i>
<b>Show Summary</b>	Show a list of all items and the quantity of each item	Ctrl+Q	Ctrl+Alt+Q	Ctrl+Shift+Q	Alt+Shift+Q	Ctrl+Winkey+Q
<b>Show Future Orders</b>	Show orders that are scheduled for a future date/time					
<b>Lock/Unlock Screen</b>	Disable auto-refresh	Ctrl+A	Ctrl+Alt+A	Ctrl+Shift+A	Alt+Shift+A	Ctrl+Winkey+A
<b>Show Settings</b>		Ctrl+S	Ctrl+Alt+S	Ctrl+Shift+S	Alt+Shift+S	Ctrl+Winkey+S
<b>Shut Down</b>						
<b>Select Order 1-12</b>	The shortcuts to select individual orders on screen	F1-F12	Alt+F1-F12	Shift+F1-F12	Ctrl+F1-F12	Winkey+F1-F12

### Programming Example

When configuring a generic programmable keypad, such as the Genovation ControlPad 682, connect the keypad to any PC and install the manufacturer provided programming utility. The MacroMaster programming utility allows the user to easily program a keystroke combination (macro) for each key so that the key can trigger a specific action in the remote display. Since the keypad in this example contains more keys than required by the Remote Display application, keys can be made double height or width for easier access. The Genovation 1x2 Relegendable Key Caps are used to combine 2 keys into a single key and can be used either vertically or horizontally. Frequently accessed functions (F1-F12 order selection, Bump, Un-Bump) can be assigned to two keys that are covered by the 1x2 plastic keycap.

\*Installing the programming utility on the Remote Display computer is not required. The keypad can be programmed from any Windows PC and will retain the settings when connected to a different computer. Click [here](#) to download the configuration file used in the example below.



Genovation MacroMaster Programming Utility

Begin by programming the order selection shortcuts 1-12. In the example below, the top left key is assigned to order #1. Click the F1 button on the screen to add the keystroke to the list that will be sent whenever the key is pressed. Enter a user friendly description and click **Save**. If you are using key caps for double-sized keys, repeat the process for the adjacent key.

### Advanced Configuration

By default, orders are first selected with a single keystroke, then bumped with a second single keystroke. Some users may wish to program a macro that sends the Select and Bump commands with a single keystroke, but allows the user to select the order (without bumping) by pressing Shift followed by pressing the order key. Each system presents a unique set of requirements and the keypad can be programmed to minimize the number of keystrokes for the prep staff and achieve maximum efficiency.

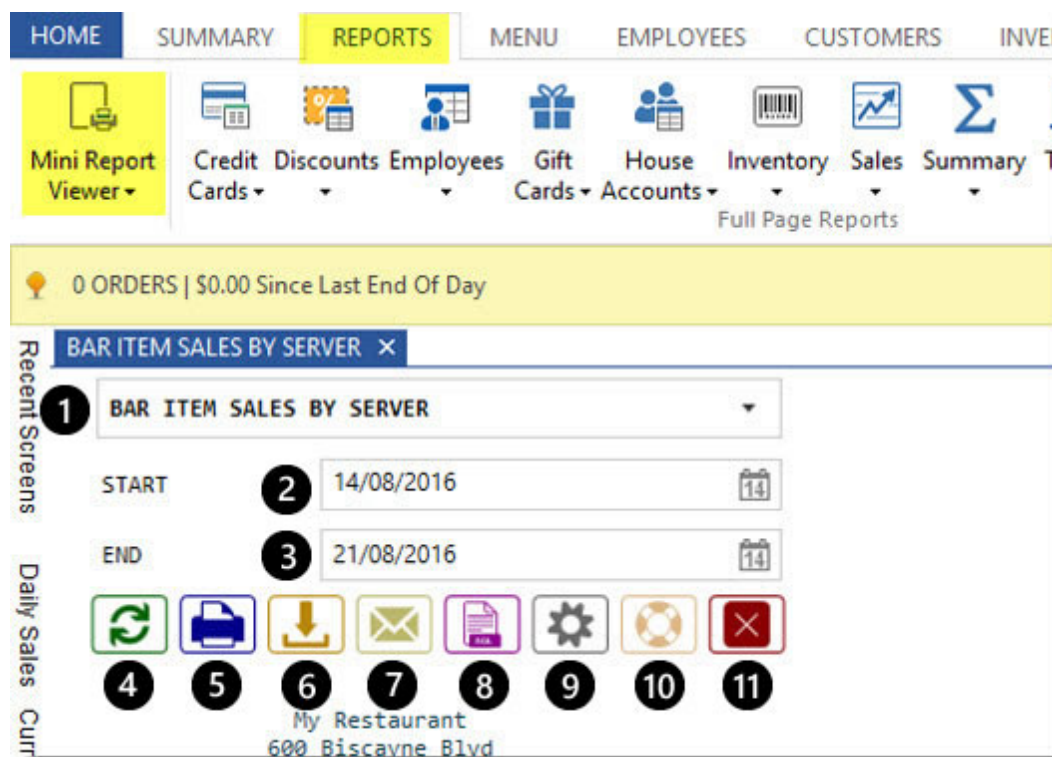
Part 29

# Reports

## 29 Reports

### 29.1 Mini Reports

Mini reports appear on both the manager screen and in Back Office under the Reports tab. The reports are designed to print to a standard thermal receipt printer. When printed from back office, the reports can also be printed to a full size printer.
























The following options are available in the back office mini report viewer:

1. **Reports List:** Select the report from the drop-down list to automatically load a report based on the selected start and end date
2. **Start Date:** Select the report start date. The business name start time is automatically appended to the start date
3. **End Date:** Select the report end date. The business day start time minus one second is automatically appended to the end date. For example, if the business day start time is 6:00 AM and April 5 is selected, the end date is formatted to April 6, 5:59:59 AM
4. **Refresh:** Reload the selected report based on the selected start and end date
5. **Print:** Print the report to any local or shared printer
6. **Save:** Save the report to disk as a text file
7. **Email:** Email the report to any recipient using the email settings specified in **Back Office>Settings>Email & SMS**<sup>978</sup>. The default email address is the From address specified in the email settings, but can be changed on a per-report basis. Separate multiple email addresses with a comma, i.e. [test1@test.com](mailto:test1@test.com),[test2@test.com](mailto:test2@test.com)
8. **SQL:** View the underlying SQL query used to generate the report. The SQL query is useful for designing custom reports
9. **Settings:** View the various report options
10. **Help:** View the mini reports help topic
11. **Close:** Close the mini report viewer.

The following mini reports are available:



- [Bar Item Sales By Server](#) 
- [Credit Card Gratuities](#) 
- [Credit Card Transactions](#) 
- [Deliveries By Driver](#) 
- [Inventory Usage](#) 
- [Item Sales By Type](#) 
- [Low Inventory \(Actual\)](#) 
- [Low Inventory \(Estimate\)](#) 
- [Non Cash Gratuities](#) 
- [Non Cash Gratuities Detail](#) 
- [Open PreAuth](#) 
- [PLU List \(By Name\)](#) 
- [PLU List \(By PLU\)](#) 
- [Sales By Hour](#) 
- [Sales By Item Type](#) 
- [Sales By Order Type](#) 
- [Sales By Server](#) 
- [Sales By pos station](#) 
- [Server Banking](#) 
- [Order Voids](#) 
- [Time Sheet Activity](#) 

#### Bar Item Sales By Server

- End of Day: This report is useful when servers are required to tip bartenders a percentage of sales. The report includes bar item and bar optional (subtotal) sales multiplied by the bar tax rate for the current business day grouped by server and excluding removed order items, order voids and archived orders. Advanced options for this report include **ExcludeBartendersFromBarSalesReport** (to ignore bar item sales by bartenders) and **IncludeTaxInBarSalesReport**, both configurable under Yes/No settings in Back Office.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current sales, if applicable. Discounts are not included in this report.

#### Credit Card Gratuities

- End of Day: This report is useful for restaurants that do not use server banking and disburse credit card gratuities daily or weekly. The report summarizes gratuities based on orders that have not yet been archived (any order still open or started after the last end of day was run), grouped by server. When using integrated credit card processing, the report summarizes gratuities added using the Add Gratuity or Post-Auth transaction type, as displayed under the **Gratuity** column in Back Office/Summary/Credit Cards. When using an external credit card computer, the report summarizes data from the **Gratuity Amount** column in Back Office/Summary/Transactions. The report excludes data for archived orders, order voids and transaction voids.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current sales, if applicable.

#### Credit Card Transactions

- End of Day: This report summarizes credit card sales by card type and lists credit card transaction details for orders that have not yet been archived (any order still open or started after the last end of day was run), grouped by order id. For integrated credit card processing, the report summarizes sales processed using the **Sale** or **Pre-Auth** transaction type, as displayed under the **TxAmount** column in Back Office/Summary/Credit Cards. When using an external credit card computer, the report summarizes data from the **Amount** column in Back Office/Summary/Transactions. The report excludes data for archived orders, order voids and transaction voids.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current sales, if applicable.

#### Deliveries By Driver

- End of Day: This report is used to display all deliveries for orders generated during the current business day (archived orders excluded), grouped by Driver and order ID. Gratuities are shown below each order's total along with the customer name. Voided orders, archived orders and voided deliveries are excluded
- Back Office: Same as above but allows a date range selection.

#### Inventory Usage

- End of Day: This report calculates inventory usage based on the recipe entered for each menu item and optional, grouped by inventory item name. The total cost and quantity used is shown next to each item (unused items are excluded). Quantities are rounded to 2 decimal places. Voided orders, removed order items and archived orders are not included in this report.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current sales, if applicable.

**Item Sales By Type**

- End of Day: This report summarizes sales by item type for current orders grouped by item type (i.e. regular menu item, bar optional, delivery charge, etc) and item name. Archived orders, order voids and removed order items are excluded. Only items with a price greater than zero are included in this report. The quantity of each item sold is included in parenthesis next to the item name and the total sales for each item (tax and discounts not included) appears in the right column. Note that this report will accurately reflect price changes, since the quantity is not used to calculate the total (totals are calculated on a per order basis).
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current sales, if applicable.

**Low Inventory (Actual)**

- End of Day: This report displays inventory items that have an actual quantity at or below the predefined reorder level. The actual quantity is the quantity entered at the last manual (physical) inventory count.
- Back Office: Same as above.

**Low Inventory (Estimate)**

- End of Day: This report displays inventory items that have an actual quantity at or below the predefined reorder level. The actual quantity is the remaining quantity calculated by AmigoPOS based on item sales (and the recipe entered for each item).
- Back Office: Same as above

**Non Cash Gratuities**

- End of Day: This report summarizes gratuities received for non-cash transactions, grouped by server. The report summarizes data from the **Gratuity Amount** column in Back Office/Summary/Transactions. It differs from the credit card gratuities report in that gratuities from house account transactions are also included. Voided orders, voided transactions and archived orders are not included in this report.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current transactions, if applicable.

**Non Cash Gratuities Detail**

- End of Day: This report is identical to the Non Cash Gratuities report but groups gratuities by server, transaction and order id with the total shown for each server.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current transactions, if applicable.

**Open PreAuth**

- End of Day: This report is used to determine the TroutD of any Pre-Auth transaction that has not been captured. Applies to integrated payment processing only and excludes voided transactions. This report does **NOT** exclude voided orders, since voiding an order does not automatically void a credit card transaction.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current transactions, if applicable.

**PLU List (By Name)**

- End of Day: Not available
- Back Office: This report displays a list of PLUs for items where the PLU is greater than zero. The PLU, item name and price are displayed, sorted by item name.

**PLU List (By PLU)**

- End of Day: Not available
- Back Office: This report displays a list of PLUs for items where the PLU is greater than zero. The PLU, item name and price are displayed, sorted by PLU.

**Sales By Hour**

- End of Day: Not available
- Back Office: This report summarizes sales (tax and discounts included) based on hour of the day for the specified date range, excluding voided orders.

**Sales By Item Type**

- End of Day: Not available
- Back Office: This report is similar to the [Item Sales By Type](#) report except that sales totals (tax and discounts not included) are grouped by item type (individual items totals are not displayed). Voided orders are excluded.

**Sales By Order Type**

- End of Day: Not available
- Back Office: This report summarizes total sales by order type for the specified date range, grouped by order type. The order type, order count and sales total (tax and discounts included) is shown for each order type with sales greater than zero. Voided orders are excluded.

**Sales By Server**

- End of Day: Not available
- Back Office: This report summarizes total sales by server for the specified date range, grouped by order type. The server name, order count and sales total (tax and discounts included) is shown for each order type with sales greater than zero. Voided orders are excluded.

**Sales By Pos Station**

- End of Day: Not available
- Back Office: This report summarizes total sales by pos station id for the specified date range, grouped by order type. The pos station id, order count and sales total (tax and discounts included) is shown for each order type with sales greater than zero. Voided orders are excluded.

**Server Banking**

- End of Day: This report is used to determine the server's liabilities when server banking is used. The total (including tax and discounts) for each server is shown, grouped by order type. The report will include the house bank in the calculation only if a house bank is used (servers do not start the shift with their own money). In addition, the report can also deduct non-cash gratuities, if the **ServerBankingDeductGratuities** Yes/No setting is enabled. The report also displays any current time sheet entries for the server.
- Back Office: Same as above but allows a date range selection. This report includes all sales within the specified date range, including current transactions, if applicable, but is not useful to determine server liabilities since the server has most likely submitted funds for historical sales.

**Order Voids**

- End of Day: This report displays individual order voids from the current business day and includes the order id, order type, user (that voided the order), void reason, and order total (tax and discounts included)
- Back Office: Same as above but allows a date range selection. This report includes all orders within the specified date range, including current orders, if applicable.

**Time Sheet Activity**

- End of Day: This report includes all time sheet entries for the current business day (based on the 24-hour period starting with the business open time), group by job type (permission) and sorted by the employee last name. The report also includes any open time sheet entry (clocked in but not clocked out), regardless of date.
- Back Office: Same as above but allows a date range selection. This report includes all time sheet entries within the specified date range, including current entries, if applicable.

## 29.2 Full Page Reports

The back office report viewer is used to display XML reports that are formatted printing. The reports are categorized as described below and multiple instances of the report viewer can be opened simultaneously. The following options are available in the report viewer:

**Tax Collected By Business Day**

Taxes: Tax Collected By Business Day

Date Range: 01/12/2015 - 01/06/2016

My Restaurant  
888 Biscayne Blvd  
Miami, FL 33132  
111-222-3333

**TAX COLLECTED BY BUSINESS DAY**

DATE RANGE: 01/12/2015 06:00:00 a.m. - 02/06/2016 05:59:59 a.m.

**REVENUE SUMMARY**

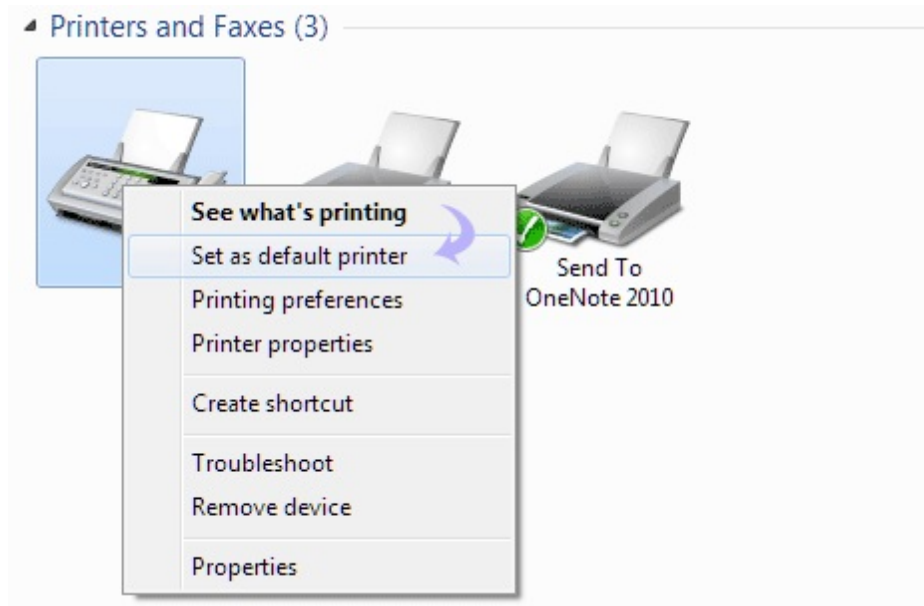
TOTAL SALES:	\$638,563.68	ORDER COUNT:	18736
SUBTOTAL:	\$590,000.13	AVERAGE ORDER:	\$34.08
TAX:	-\$47,071.34	MAXIMUM ORDER:	\$2,310.28
TAX (BAR INCLUSIVE):	\$0.00	MINIMUM ORDER:	\$0.00
DISCOUNTS:	-\$6,936.84	GUEST COUNT:	26023

Type text to find...

1. **Report Category:** Select the report category from the drop-down list. Each report category corresponds to an XML report definition which can be imported into the custom report designer.
2. **Report Name:** Select the report from the drop-down list. Each report category contains one or more reports.
3. **Start Date:** Select the report start date. The business name start time is automatically appended to the start date
4. **End Date:** Select the report end date. The business day start time minus one second is automatically appended to the end date. For example, if the business day start time is 6:00 AM and April 5 is selected, the end date is formatted to April 6, 5:59:59 AM
5. **Refresh:** Reload the selected report based on the selected start and end date
6. **Email:** Email the report to any recipient using the email settings specified in **Back Office>Settings>Email & SMS**. The default email address is the From address specified in the email settings, but can be changed on a per-report basis. Separate multiple email addresses with a comma, i.e. [test1@test.com](mailto:test1@test.com),[test2@test.com](mailto:test2@test.com)
7. **Settings:** View the various report options
8. **SQL:** View the underlying SQL query used to generate the report. The SQL query is useful for designing custom reports
9. **Print:** Print the report to any local or shared printer
10. **Copy:** Copy the selected text to the Windows clipboard
11. **Increase Size:** Increase the magnification
12. **Decrease Size:** Decrease the magnification
13. **View 100%:** Reset the magnification to view the report as designed
14. **Fit Width:** Adjust the magnification to view the stretch the report horizontally
15. **Fit Page:** Adjust the magnification to view the stretch the report vertically
16. **Fit 2 Pages:** Adjust the magnification to view the stretch the report vertically and view 2 pages simultaneously
17. **Export PDF:** Export the report to a PDF file
18. **Export HTML:** Export the report to an html file
19. **Export Excel:** Export the report to an Excel file
20. **Export Text:** Export the report to a text file
21. **Help:** View the full page reports help topic

### Page Size

Full Page Reports are designed to print to full size printers using letter-size paper. In order for the reports to display correctly on screen (and print correctly), the local default printer must be set to a full size printer. If a prep order or receipt printer is selected as the default printer, the reports will appear to be only 3 inches wide. If a full size printer is not installed, use the Windows Add Printer applet to install a generic full printer and set it to be the default printer, or select another installed printer, such as the Microsoft Office Document Image Writer or fax printer to act as the default printer.



**Windows Control Panel/Devices and Printers**

The following report types are available in Back Office - Reports - Full Page Reports:

- [Credit Cards](#) 1054
- [Discounts](#) 1055
- [Employees](#) 1055
- [Gift Cards](#) 1055
- [Customer Accounts](#) 1055
- [Inventory](#) 1055
- [Sales](#) 1054
- [Taxes](#) 1055
- [Orders](#) 1055
- [Time Sheet](#) 1055
- [Transactions](#) 1055

### Credit Cards

- Credit Card Transactions By Server: This report includes a summary for each credit card transaction processed in the specified date range, grouped by user id. Note that this report is for use with integrated payment processing only and will not display data when using an external credit card computer.
- Credit Card Transactions by Order ID: This report includes a summary for each credit card transaction processed in the specified date range, grouped by order id and sorted by date/time in descending order. Note that this report is relevant only when using integrated credit card processing and will not display data when using an external credit card computer.
- Credit Card Transactions Summary: Displays a summary of all credit card transactions grouped by transaction type (pre-auth, post-auth, sale, add gratuity) for the specified date range. This report is viewed and printed in landscape format.
- Credit Card Voids By order ID: This report includes a summary for each credit card transaction void processed in the specified date range, grouped by order id. Note that this report is for use with integrated credit card processing only and will not display data when using an external credit card computer.

**Discounts**

- Discount Definitions: Displays each discount definition with the amount/percent, order minimum, start/end date and time on/off.
- Discount Details: Displays discounts applied in the specified date range and includes the order id, date/time, user name, discount name and total amount. Voided orders are not included in this report.
- Discount Summary: Displays discounts applied in the specified date range and includes the discount name, total amount, item count and order count. Voided orders are not included in this report.

**Employees**

- Employee Actions Log: Shows each employee action grouped by user name and sorted by date/time in ascending order. The order id is included for order actions.
- Employees Summary: Displays detailed contact information for each employee, sorted by user id.
- Excessive Gratuities: Displays transactions where the gratuity amount meets or exceeds the predefined excessive gratuity threshold.

**Gift Cards**

- Gift Card Summary (Active): Displays a summary for each gift card and a list of gift card transactions for the specified date range where the gift card is still active (not expired). This report does not include voided transactions or disabled gift cards.
- Gift Card Summary (All): Displays a summary for each gift card and a list of gift card transactions for the specified date range, including expired gift cards. This report does not include voided transactions.
- Gift Card Transactions: Displays a list of gift card transactions grouped by user (cashier) for the specified date range. This report does not include voided transactions.
- Gift Card Transactions (Voids): Displays a list of gift card transactions grouped by user (cashier) for the specified date range. This report includes only voided transactions.

**Customer Accounts**

- Customer Account Summary: Displays a list of customer accounts with customer name, customer id, balance due, account limit and transaction count for all house accounts.
- Customer Account Summary (Balance Due): Displays a list of customer accounts with customer name, customer id, balance due, account limit and transaction count for house accounts with a balance due greater than zero.
- Customer Account Transactions: Displays a list of customer account transactions with customer name, user name, customer id, sale/deposit amount and transaction id for all house account transactions entered within the specified date range.

**Inventory**

- Inventory Physical Count: The report is useful when performing a manual count of inventory items. A list of all inventory items is shown grouped by inventory category and includes the Case SKU, Pack SKU, Unit SKU, QTY Estimate, Reorder Level and a space to enter the observed count.
- Inventory Summary: The report includes a list of all inventory items grouped by inventory category and includes the Case SKU, Pack SKU, Unit SKU, Actual Quantity, Quantity Estimate and Reorder Level
- PLU List: Includes a list of regular menu or retail items with a PLU greater than zero. Useful for programming deli scales.
- Retail Items Summary: This reports displays a list of all retail items grouped by menu category and includes the price, tax rate, bottle deposit amount, PLU and SKU.

**Sales**

- Bar Item Sales: Sales totals are shown for bar items grouped by menu category name for the specified date range. Totals do not include tax, discounts, removed order items or voided orders.
- Bar Optional Sales: Sales totals are shown for bar optional items for the specified date range. Totals do not include tax, discounts, removed order items or voided orders. Only modifiers with a price greater than zero are included in this report.
- Regular and Retail Item Sales: Sales totals are shown for regular menu items grouped by menu category name for the specified date range. Totals do not include tax, discounts, removed order items or voided orders.
- Regular Optional Sales: Sales totals and quantities are shown for regular optional items for the specified date range grouped by optional group name. Totals do not include tax, discounts, removed order items or voided orders. Only modifiers with a price greater than zero are included in this report.
- Retail Sales By Category: Sales totals are shown for retail items grouped by category name for the specified date range. Totals do not include tax, discounts, removed order items or voided orders.
- Sales By Hour: This report includes the order count, guest count, subtotal (total), tax (total), discount (total) and gratuity total for sales in the specified date range, grouped by hour of day. Voided orders are not included in this report.
- Sales By Order Type: This report includes the order count, guest count, subtotal (total), tax (total), discount (total) and gratuity total for sales in the specified date range, grouped by order type. Voided orders are not included in this report.

### Taxes

- **Tax Collected by Business Day:** This report displays sales tax collected for each business day along with the sales subtotal for that day. Tax is summarized by the tax alias, not the tax id, so that the total tax owed to different municipal agencies appears in separate columns, as shown below. Refer to the [sales tax](#) <sup>1073</sup> help topic for additional information on sales tax setup. Voided orders are not included in this report.

Tax Year 2009				
Date	Sales Subtotal	GST	PST	-
03/23	\$0.00	\$0.00	\$0.00	\$0.00
03/24	\$169.75	\$10.19	\$1.70	\$0.00
03/25	\$183.10	\$10.99	\$1.83	\$0.00
04/03	\$0.00	\$0.00	\$0.00	\$0.00
04/06	\$50.21	\$3.01	\$0.50	\$0.00
04/10	\$259.98	\$15.28	\$2.53	\$0.00
04/11	\$101.01	\$5.91	\$0.99	\$0.00
04/12	\$136.01	\$8.16	\$1.36	\$0.00
	\$900.06	\$53.53	\$8.91	\$0.00

**Tax Collected by Business Day**

- **Tax Collected by Calendar Week:** Similar to the **Tax Collected by Business Day** report except that totals are summarized over the year/calendar week.
- **Tax Collected by Month:** Similar to the **Tax Collected by Business Day** report except that totals are summarized over the year/month.

### Orders

- **Removed Items By Order Type:** This report displays each order item removed with the item type, price (tax not included), reason removed, date/time grouped by order type for the specified date range. This report includes voided orders.
- **Removed Items By User:** This report displays each order item removed with the item type, price (tax not included), reason removed, date/time grouped by user for the specified date range. This report includes voided orders.
- **order Voids By User:** This report displays the order id, date/time, void reason, order type pos station id, subtotal and tax for orders entered in the specified date range and grouped by user id. Note that the date/time calculation is based on time entered, not time voided.
- **order Voids By Void Reason:** This report displays the order id, date/time, void user, order type pos station id, subtotal and tax for orders entered in the specified date range and grouped by void reason id. Note that the date/time calculation is based on time entered, not time voided.

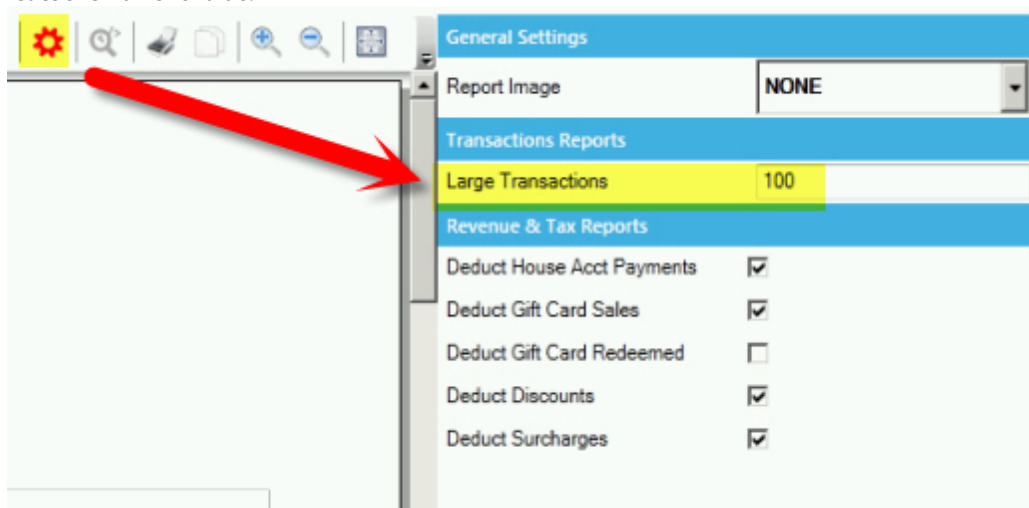
### Time Sheet

- **Employee Hours:** This report displays each time sheet entry and total hours (grouped by employee) for the specified date range.

### Transactions

- **Transactions (Large Amount):** Includes the transaction id, order id, pos station id, drawer id, date/time, user id (not login id) and transaction amount for each transaction entered within the specified date range. Voided

transactions are not included. The large transaction amount threshold is determined by the **Large Transactions** numeric value.



- Transactions By Order Type: Includes the order count, guest count and transaction type/total, grouped by order type for the specified date range. Voided transactions are not included.
- Transactions Detail Report: Includes the transaction id, order id, pos station id, drawer id, date/time, user id (not login id) and transaction amount for each transaction entered within the specified date range. Voided transactions are not included.
- Transactions Summary: Includes the order count, transaction total, transaction average, transaction minimum and transaction maximum for each transaction entered within the specified date range, excluding voided transactions.
- Transactions Voids: Includes the transaction id, order id, pos station id, drawer id, date/time, user id (not login id) and transaction amount for each transaction entered within the specified date range. Note that the time that the transaction was entered is used to calculate this report; the transaction void time is not used.

## 29.3 Report Designer

User defined reports can be created with the report designer. Reports are grouped into *report definitions*, with each enabled report definition corresponding to a drop-down button in the **Custom Reports** group **Back Office > Reports**. A maximum of 10 report definitions are available. Each report definition can contain an unlimited number of reports.

Review each of the following topics to become familiar with the report designer setup and usage:

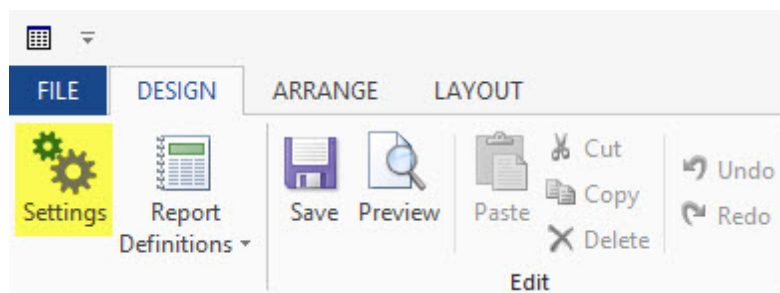
[Enable a Report Definition](#) <sup>1057</sup>

[Create a New Report](#) <sup>1059</sup>

[Display Date Range in Report Header](#) <sup>1065</sup>

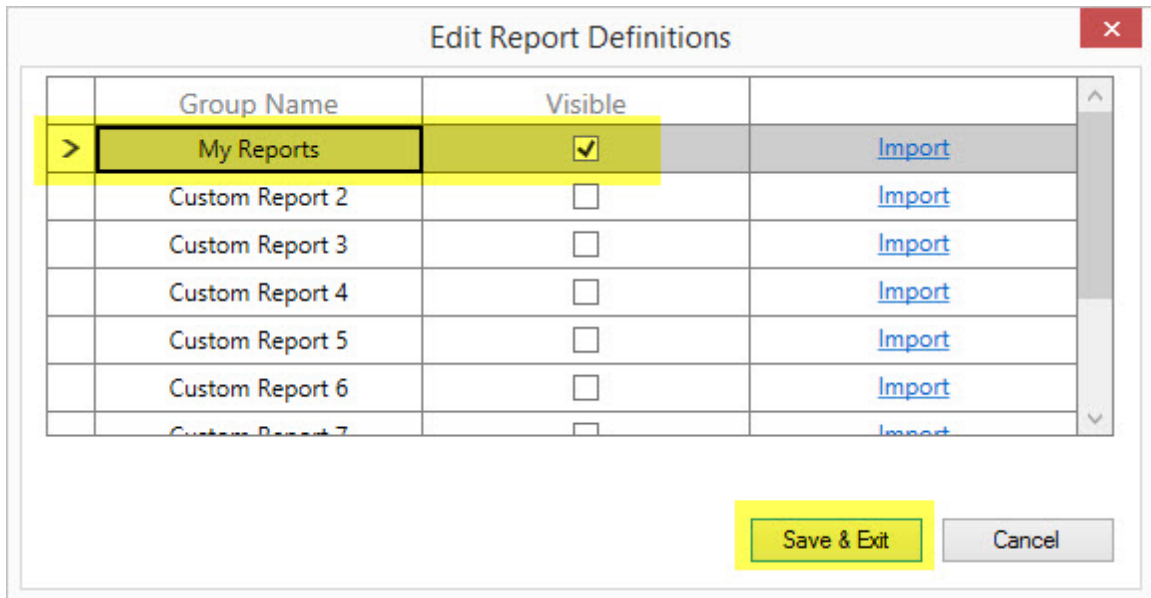
### Enable a Report Definition

To begin, open the report designer and click Settings to open the report definitions editor.



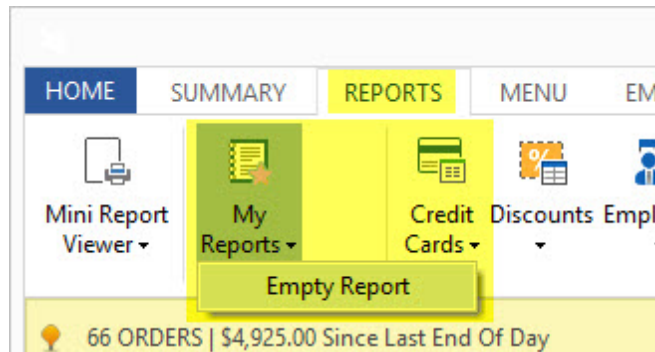


Check the Visibility box next to the first report definition and rename it to My Reports. Click Save & Exit.



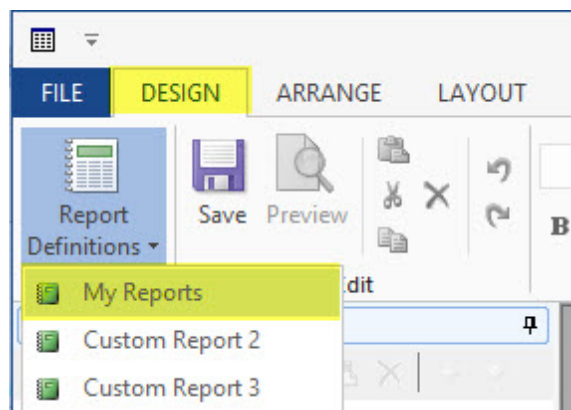
**Report Definitions Editor**

Start back office and verify that a new drop-down button is visible in the Custom Reports group.



**Back Office/Reports**

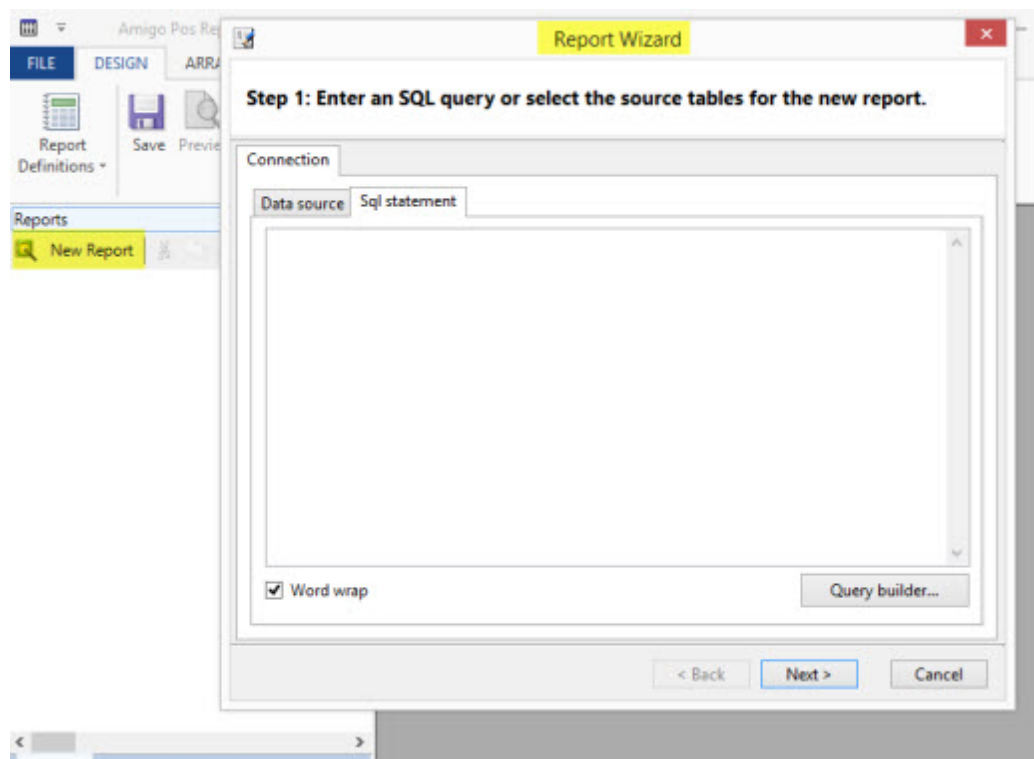
Close back office and return to the report designer. Select the new report definition named My Reports under Report Definitions.



**Report Definitions**

## Create a New Report

Click New Report to add a report to the report definition.



**New Report Wizard**

Enter an SQL statement for the new report. In this example, the report will query the Tickets table and prompt the user to select the start date and end date as follows:

**PARAMETERS** [Start Date] DateTime 1/1/2015, [End Date] DateTime 1/1/2017; **Select \* From Tickets Where TimeDateStamp Between [Start Date] And [End Date];**

Note that the parameters (displayed in blue text above) [Start Date] and [End Date] are specified before the SQL statement and are separated by a comma and end with a semicolon. The SQL statement (displayed in red text above) includes the parameters in the Where clause. The parameters displayed in blue text above are defined as follows:

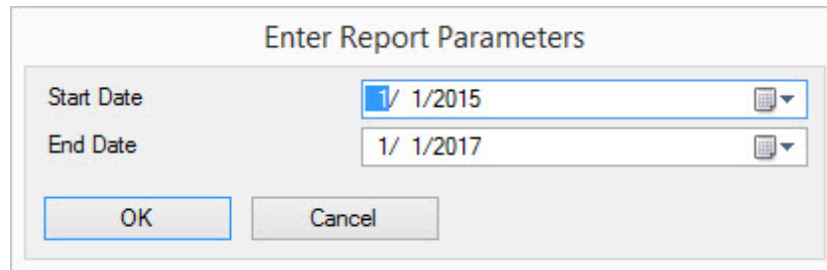
- [Start Date] : first parameter name
- DateTime : parameter data type
- 1/1/2015 : default value
- [End Date] : second parameter name
- DateTime : parameter data type
- 1/1/2017 : default value

The syntax for the PARAMETERS clause consists of a comma-separated list of items, ending with a semi-colon. Each item describes one parameter and includes the following information:

- Parameter name. If the name contains spaces, it must be enclosed in square brackets (for example, [Beginning Date]). The parameter name appears in the dialog box used to collect the information from the user, and it also appears in the WHERE clause for the SQL statement, where it is replaced with the value entered by the user. **Note that the parameter should not have the same name as the field(s) included in the SELECT statement.**
- Parameter type. The following types are recognized by the custom report designer:
  - Date

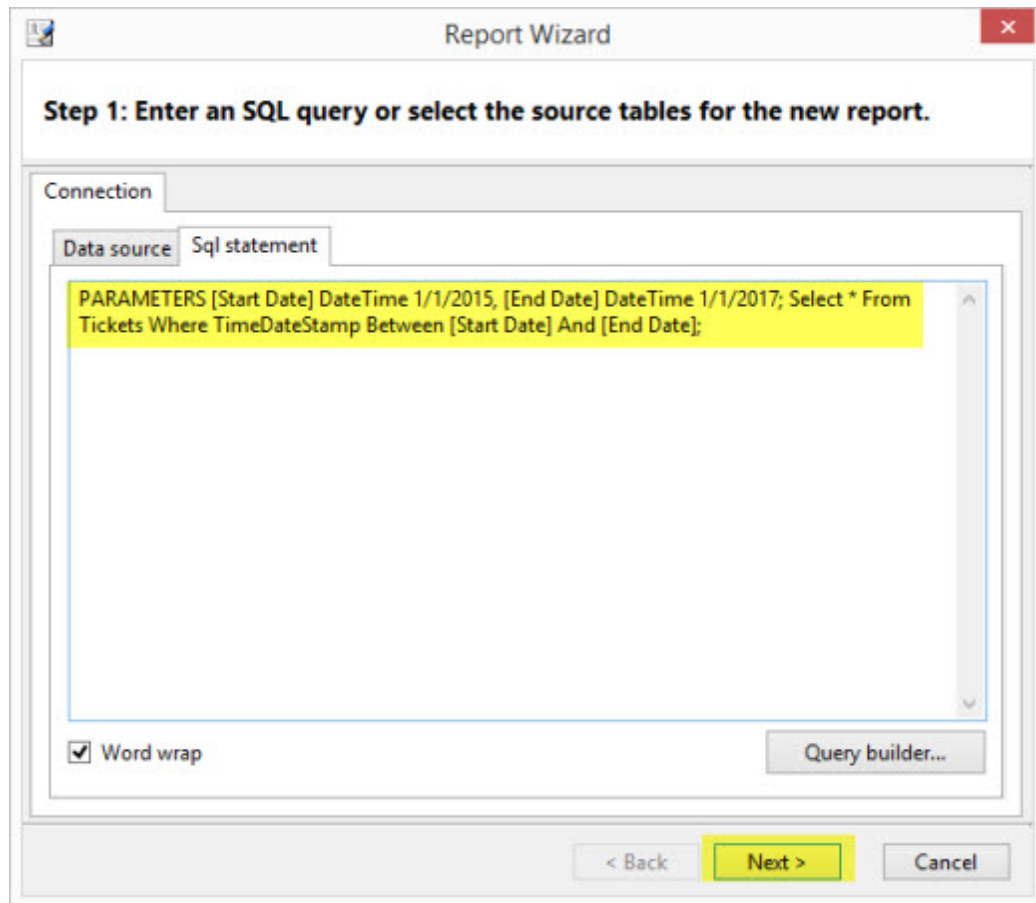
- o DateTime
- o Bit, Byte, Short, Long
- o Currency
- o Single
- o Double
- o Text, String
- o Boolean, Bool, YesNo

This parameter definition will prompt the end user to enter the dates as shown below:

A dialog box titled "Enter Report Parameters". It contains two input fields: "Start Date" with the value "1/ 1/2015" and "End Date" with the value "1/ 1/2017". Each field has a calendar icon to its right. At the bottom are "OK" and "Cancel" buttons.

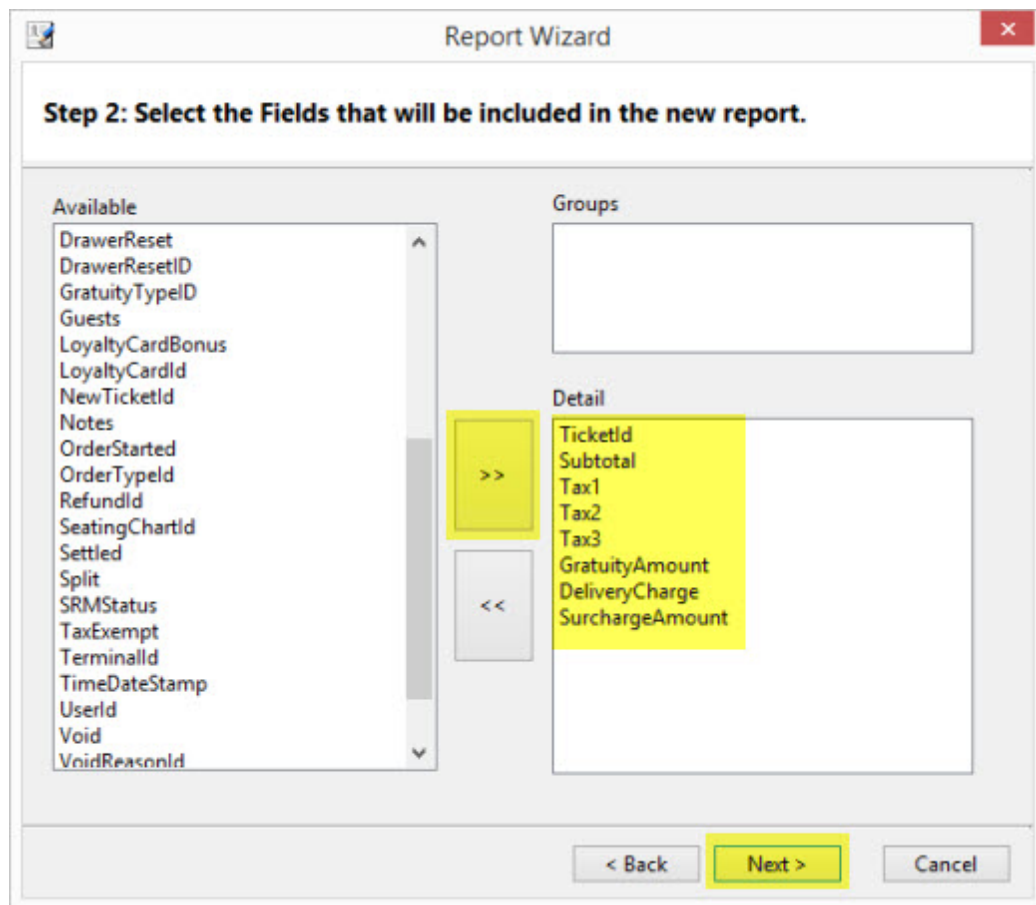
**Parameter Prompt**

Verify that the SQL statement is entered correctly and click Next.

A screenshot of the "Report Wizard" window, Step 1. The title bar says "Report Wizard". The main heading is "Step 1: Enter an SQL query or select the source tables for the new report." Below this is a "Connection" section with two tabs: "Data source" and "Sql statement". The "Sql statement" tab is active, showing a text area with the SQL query: "PARAMETERS [Start Date] DateTime 1/1/2015, [End Date] DateTime 1/1/2017; Select \* From Tickets Where TimeDateStamp Between [Start Date] And [End Date];". Below the text area is a "Word wrap" checkbox which is checked. To the right of the text area is a "Query builder..." button. At the bottom of the window are three buttons: "< Back", "Next >" (highlighted in yellow), and "Cancel".

**SQL Statement**

Specify the fields to display and groups. This simple example will not group the data and will display only the order id, subtotal, tax, delivery charge, surcharge and gratuity. Click Next to continue.



**Grouping and Field Selection**

Specify the layout for the report. The tabular layout is ideal for most reports. Reports that contain many fields can use landscape orientation for proper column spacing. Click Next to continue.

The image shows a 'Report Wizard' window with a title bar containing a close button. The main area is titled 'Step 3: Select the layout for the new report.' On the left, there is a preview of a report layout showing a table with 4 columns and 10 rows of data, preceded by a header row. The table is surrounded by a gray border. On the right, there are two sections: 'Layout' and 'Orientation'. The 'Layout' section has five radio buttons: 'Columnar', 'Tabular' (selected), 'Justified', 'Labels', and 'Stepped'. The 'Orientation' section has two radio buttons: 'Portrait' (selected) and 'Landscape'. Below these sections is a checkbox labeled 'Adjust fields to fit page' which is checked. At the bottom right, there are three buttons: '< Back', 'Next >' (highlighted in yellow), and 'Cancel'.

Report Wizard

Step 3: Select the layout for the new report.

Layout

☐ Columnar ☐ Stepped

☒ Tabular ☐ Outline

☐ Justified ☐ Aligned

☐ Labels

Orientation

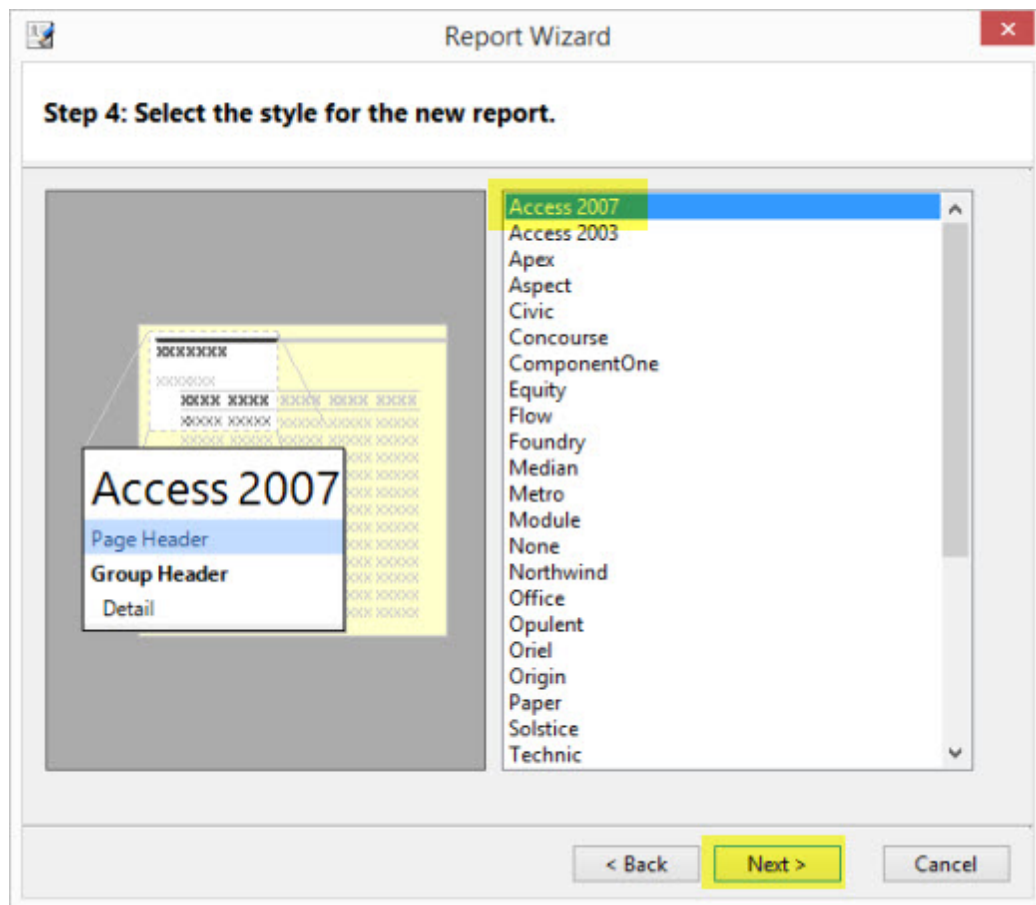
☒ Portrait ☐ Landscape

☒ Adjust fields to fit page

< Back Next > Cancel

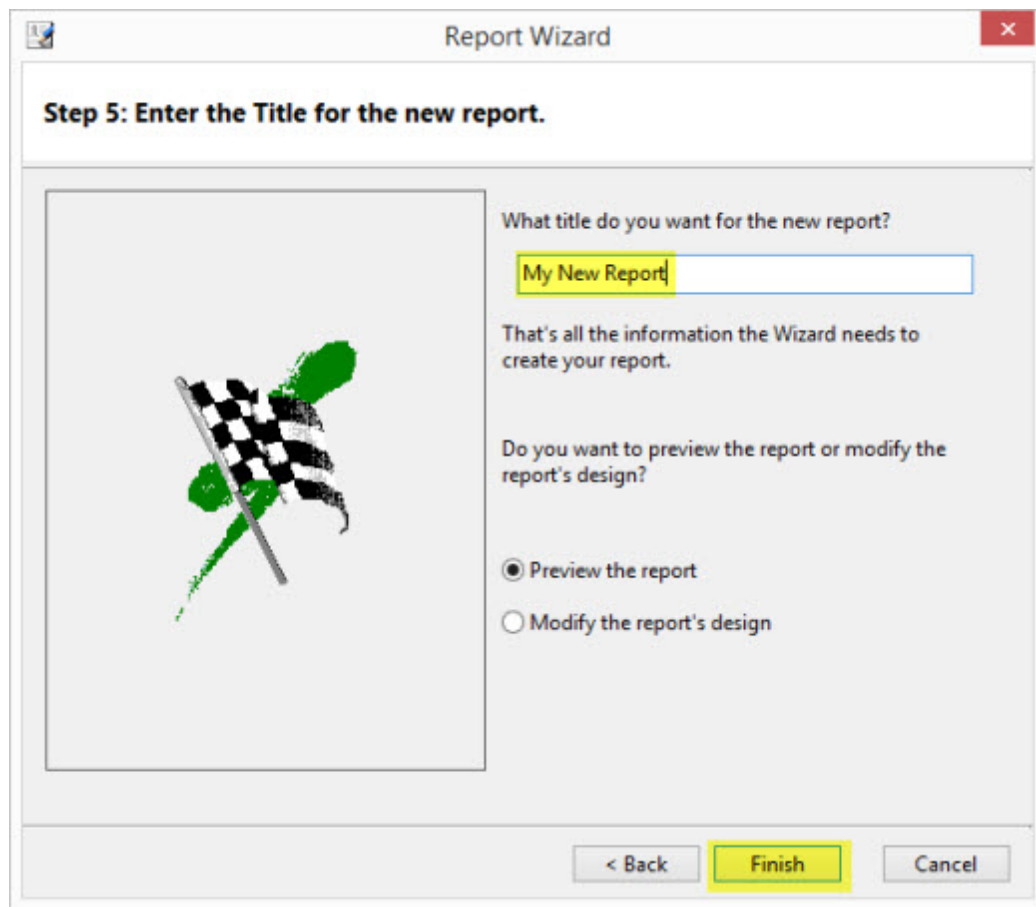
**Report Layout**

Select a visual style for the report and click Next to continue.



**Report Visual Style**

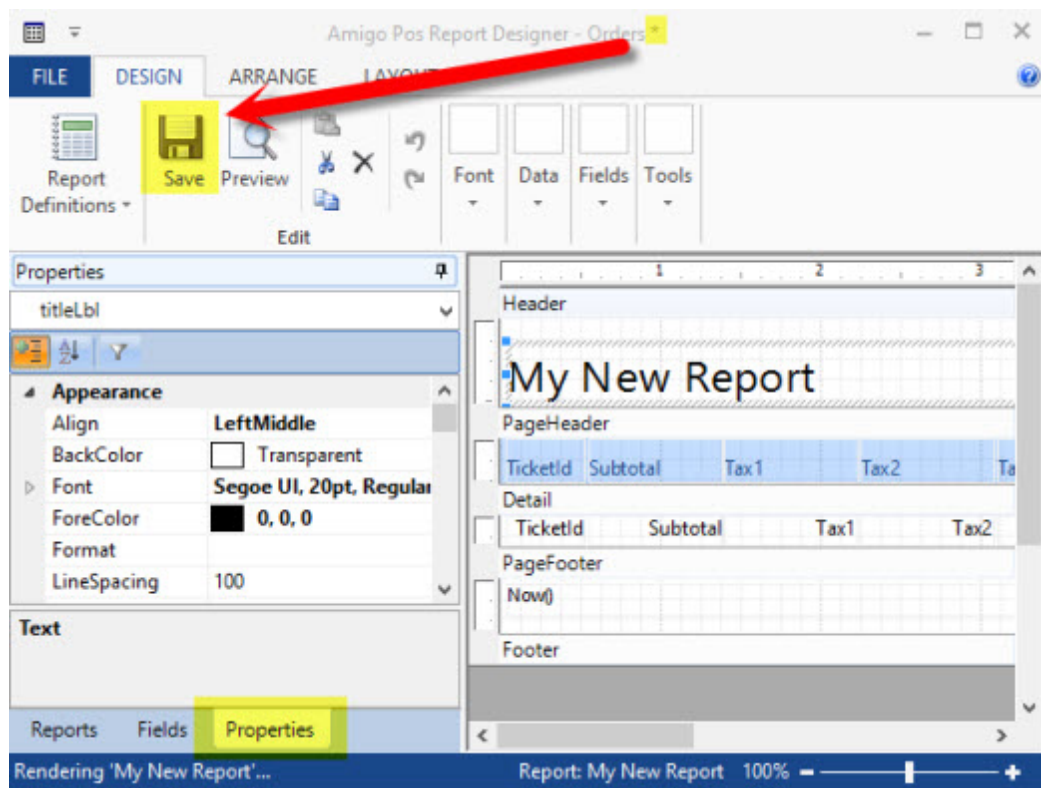
Duplicate report names cannot be used in the same report definition. Enter a unique name for the report and click Finish.



The screenshot shows a window titled "Report Wizard" with a red close button in the top right corner. The window content is titled "Step 5: Enter the Title for the new report." On the left side, there is a large rectangular area containing a graphic of a checkered flag with a green brushstroke. On the right side, the text "What title do you want for the new report?" is followed by a text input field containing "My New Report". Below this, the text "That's all the information the Wizard needs to create your report." is displayed. Further down, the question "Do you want to preview the report or modify the report's design?" is followed by two radio buttons: "Preview the report" (which is selected) and "Modify the report's design". At the bottom of the window, there are three buttons: "< Back", "Finish" (highlighted in yellow), and "Cancel".

**Report Name**

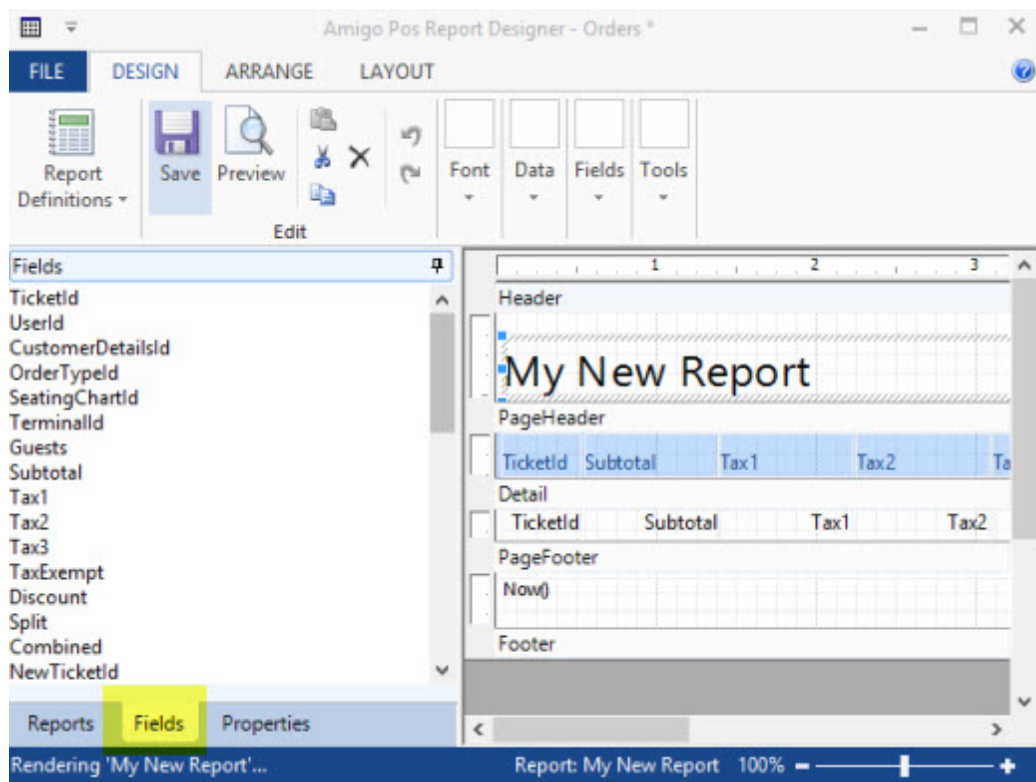
The report is displayed in preview mode and the parameter prompt appears. Click Close Print Preview at the far right to view the report on the designer canvas. Select any field to view its properties above the properties tab. Note that the asterisk in the Window caption indicates that the report definition has unsaved changes. Click Save to write the report definition to the database.



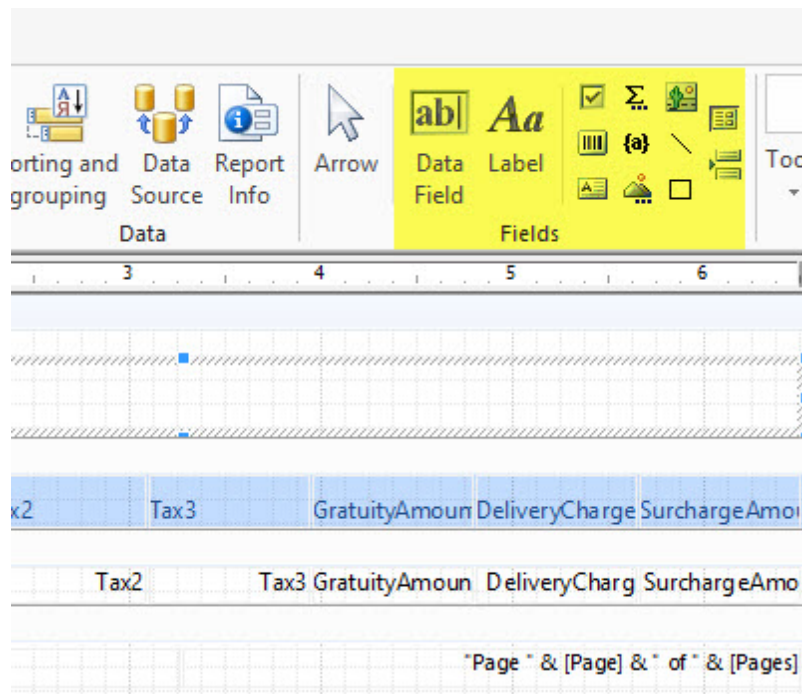
#### Field Properties

The SQL statement used in this example selects all of the columns in the Tickets table. Fields that are not currently displayed on the report can be added later by dragging the field onto the designer canvas.



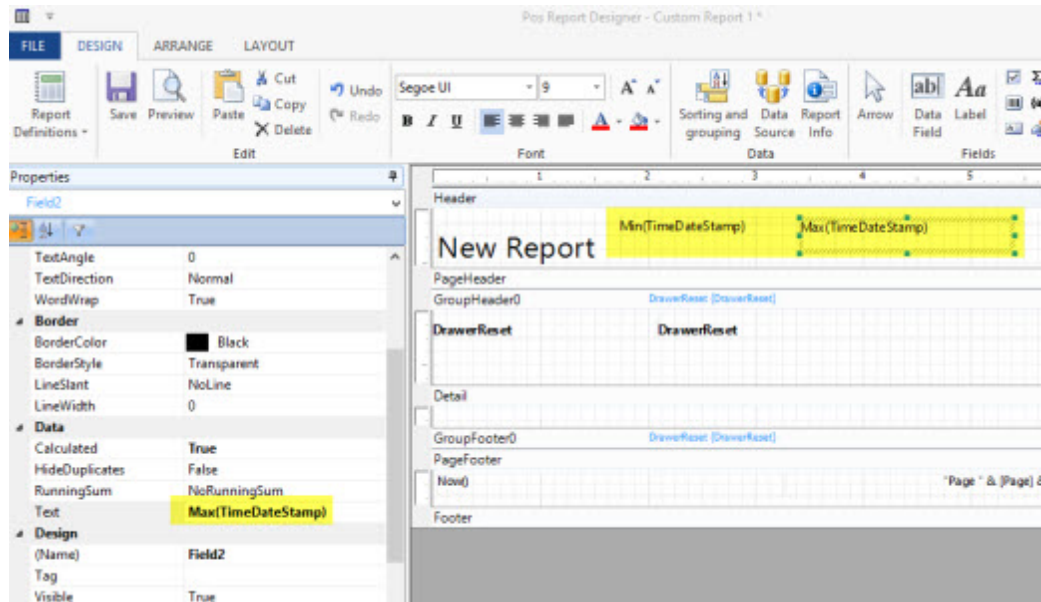
**Report Fields**

Other items that are not bound to the SQL statement (such as text labels or lines) are available in the fields toolbar and can be dragged onto the designer canvas. After adding the unbound field to the canvas, select the field to view the editable properties such as the text caption, background color or font.

**Unbound Fields**

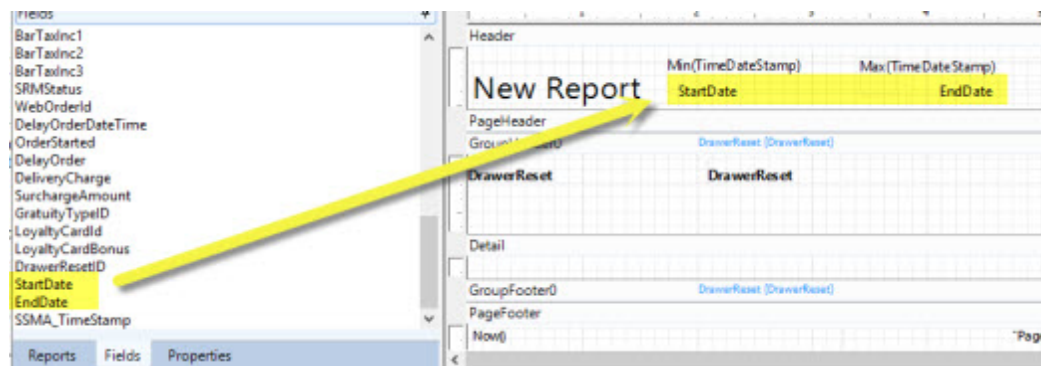
**Display Date Range in Report Header**

Use basic SQL syntax to modify the fields (using the selected field's property grid). In this case, you may not need to display the parameters, just the minimum date and maximum date, which may or may not be the same as the value of the date parameters, but does cover the date range for all of the data that is displayed on the report. Drag the **TimeDateStamp** field into the header twice and set the **Text** value of the first date to **Min(TimeDateStamp)** and the **Text** value of the second date to **Max(TimeDateStamp)**.



Alternately, change the query to also include the parameters as fields and drag the StartDate and EndDate fields into the header. Verify that the spelling is exactly the same (including spaces) for each parameter.

**PARAMETERS [Start Date] DateTime 1/1/2015, [End Date] DateTime 1/1/2017; Select \*, [Start Date] As StartDate, [End Date] As EndDate From Tickets Where TimeDateStamp Between [Start Date] And [End Date];**



## 29.4 Revenue Centers

Revenue centers can be used to apply custom labels to each menu item for use when generating the end of day Revenue Center Summary or on custom reports. Additional revenue center features will be added in upcoming releases.

End of Day Report

The Subtotal By Revenue Center Summary can be enabled in **Back Office>Settings>Main Settings>Manager Screen>End Of Day**.

End of Day Report Settings

Revenue center definitions can be added, edited or deleted in **Back Office>Settings>Main Settings>Manager Screen>Revenue Centers**. Click the top row to add a new revenue center.

**Main Settings** x

General Settings Sales Tax Order Types Order Entry User Interface

Deliveries Settle Screen **Manager Screen** Time Clock Employee Banking

Drawer Reset End Of Day End of Day Reports Special Events

**Revenue Centers** User Interface External Applications

**REVENUE CENTER SETTINGS**

ID	REVENUE CENTER	
+ Click here to add a new row		
1	FOOD	✗
2	LIQUOR	✗
3	BEER AND WINE	✗
4	DESSERTS	✗

**Revenue Centers Editor**

After adding revenue center definitions, open the menu items list to assign a revenue center to each menu item.

**MENU ITEMS LIST**

REGULAR MENU REFRESH

PRICE COLUMNS PRINTER COLUMNS AVAILABILITY COLUMNS APPEARANCE COLUMNS

ID	ITEM NAME	PRICE BY WEIGHT SUFFIX	REVENUE CENTER	CONTAINER CHARGE	DEPOS
+ Click here to add a new row					
▼ APPETIZERS - 2 Menu Items					
798	FRENCH FRIES		FOOD	\$0.00	\$0.00
799	ONION RINGS		NONE	\$0.00	\$0.00
▼ BREAKFAST - 11 Menu Items					
286	BACON & CHEESE OMEL		LIQUOR	\$0.00	\$0.00
			BEER AND WINE		
			DESSERTS		

**Menu Items List**

A revenue center can also be assigned to each regular and bar menu item in the menu item editor.

Menu Items Editor

A revenue center can be assigned to each regular menu modifier in the modifiers editor by selecting the modifier group at the left followed by the Modifiers tab at the top.

Regular Menu Modifiers Editor

A revenue center can be assigned to each bar menu modifier in the bar modifiers editor under the General Settings tab.

BAR MODIFIERS EDITOR

1

2

Bar Menu Modifiers

Settings

Appearance

Inventory

Add New Modifier

+

✖

?

Item name contains

✖

0 RED BULL

1 DRY

2 EX DRY

3 ULT DRY

4 DIRTY

5 EX VERM

7 CHILL

General Settings

Item Name

RED BULL

Prep Text

Red Bull

Price

2.5

Revenue Center

LIQUOR

Visibility

Visible

Button Position

Menu Categories

Show For All Bar Categories

☐

Bar Menu Category 1

WELL

Bar Menu Category 2

TOP SHELF

Bar Menu Category 3

TOP 10

Bar Menu Category 4

None

Revenue Center

Select the revenue center in which to include this item when generating the sales by revenue center summary on the end of day report.

Bar Modifiers Editor

Part 30

# Sales Tax



## 30 Sales Tax

### 30.1 Overview

AmigoPOS includes support for most municipalities sales tax requirements. Sales tax preferences are entered in Back Office/Settings/Main Settings by clicking the **Tax Rates** tab.

**Main Settings** ×

General Settings

**Sales Tax**

Order Types

Order Entry

User Interface

Deliveries

Settle Screen

Manager Screen

Time Clock

Employee Banking

☐ VAT Tax (tax is included in the price of all items)

Print tax line(s) on customer receipt: Normal

Print Item Tax Type on Retail Transactions Only

**SAVE CHANGES** (click to save changes)

Select the tax rate: Tax Rate 1 Description: SALES TAX Abbreviation: T1

Value	Alias	Minimum	Value	Alias	Minimum	Value	Alias	Minimum
0.1	TAX	0	0	-	0	0	-	0

#### Main Settings/Sales Tax

Up to 4 tax rate definitions can be created (in addition to Tax Rate 5 which is reserved for non-taxable items). Most users will have a single tax rate definition with one or two components. Each tax rate component corresponds to the portion of the tax paid to a municipality or other tax collection agency. Refer to the [sales tax full size report](#) to determine if separate tax rate components are required for your municipality.

For example, users in Ontario, Canada should define two components, one for the federal Goods and Services Tax (GST) of 5% and one for the Ontario provincial sales tax (PST) of 8% as shown below. Note that the PST will only be applied when the order subtotal is more than \$4, as defined by the **Minimum** value next to PST. The values for Tax Rate 2 through Tax Rate 4 are shown for reference only. Generally only Tax Rate 1 is needed for food service establishments. Note that users in Ontario must define an additional tax rate for alcoholic beverages, where the PST is charged regardless of the order subtotal.

**SAVE CHANGES** (click to save changes)

Select the tax rate: Tax Rate 1 Description: SALES TAX Abbreviation: T1

Value	Alias	Minimum	Value	Alias	Minimum	Value	Alias	Minimum
0.07	GST	0.00	0.08	PST	4.00	0.00	-	0.00

#### Sample tax configuration for users in Ontario, Canada

In many areas, users may require only a single tax component, as shown below. Note that all values are set to zero except for the first component of Tax Rate 1.



(click to save changes)

Select the tax rate: 
 Description: 
 Abbreviation:

Value	Alias	Minimum		Value	Alias	Minimum		Value	Alias	Minimum
0.10	Tax	0.00	+	0.00	-	0.00	+	0.00	-	0.00

Sample tax configuration

**Value Added Tax (Inclusive)**

Users in countries such as Australia where tax is included in the price of the item should check the box next to **VAT TAX** and enter the correct tax rates. This ensures that tax reports are accurate. Note that VAT Tax inclusive is different from Non-Taxable and should not be used in areas where the tax is not already included in the price of the item.

**Special Case: Tax Included for Bar Menu Items Ordered at the Bar**

- **Use this setting only when the tax settings are not VAT (value added tax) and bar menu items ordered at the bar have tax included in the price**

In some environments, tax is added to the price of bar menu items when the customer is seated in the dining room, but tax is included in the price of the bar menu item when the customer is seated at the bar. To enable this feature, navigate to Back Office/Settings/Main Settings Order Types and check the box under the **Bar Menu Tax Included** column next to the order type used at the bar, as shown below. Note that this setting affects bar menu items and bar menu item modifiers only. Regular menu, pizza and retail items are taxed normally.

In the example below, bar items ordered for the Bar order type are considered tax-included, but tax is added to bar menu items ordered when using any other order type. For example, a beer that costs \$3.00 (\$2.78 + .22 tax) at the bar will cost \$3.24 when ordered at the dining room (at 8% tax rate).

**Main Settings** X

**Order Types**

**View** ☒ Categorized ☐ Alphabetical

**Sales Tax**

Bar Menu Tax Included ☒

**Remote Display**

Remote Display Background Color 204; 255; 255

Remote Display Text Color 0; 0; 0

Specific Order Type Tax-Inclusive Bar Menu Items

### Non-Taxable Menu Categories For Takeout

Some locations may charge tax on food for dine-in orders but not takeout orders, while always charging tax on drinks regardless of order type. In order to specify that tax should not be charged for takeout orders, open the menu category editor and check the box next to Takeout Non-Taxable for any menu category that is tax exempt for takeout orders. In addition, verify that the order type is set to charge for takeout containers (even if the container charge is 0), as described in the [Order Types](#) topic.

**All Menu Types**

1 - PIZZA

1 - TACOS

2 - WINGS

3 - SUBS

4 - DRINKS

4 - -

**Category Settings** Menu Item Assignments Button A

**General Settings**

Category Name DRINKS

Button Position 4

Menu Type Regular Menu

Web Description

Visibility Visible

Availability In-Store & Web

**Pricing**

Inventory Markup 4

Exclude From Special Pricing ☐

Exclude From Event Pricing ☐

Takeout Non-Taxable ☒

**Day/Time Availability**

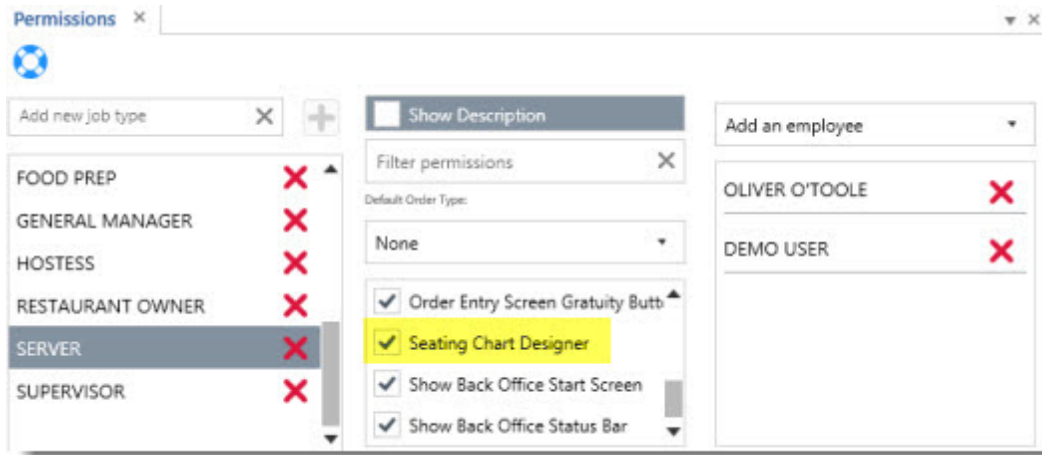
Menu Category Editor

Part 31

# Seating Charts

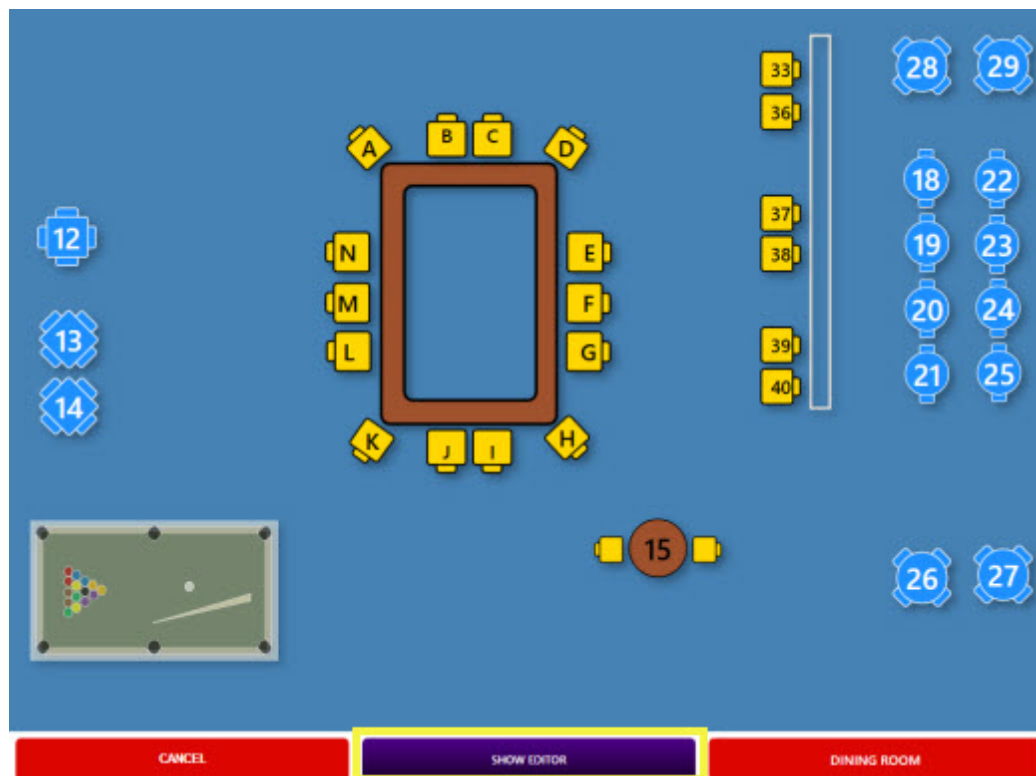
## 31 Seating Charts

AmigoPOS includes an intuitive drag & drop seating chart designer for rapid floor plan entry. The seating chart editor is integrated into the seating chart and can be accessed by starting a new dine-in order and pressing the **SHOW EDITOR** button. The button is only visible for job types that have the Seating Chart Designer [permission](#)<sup>698</sup> enabled as in the image below.



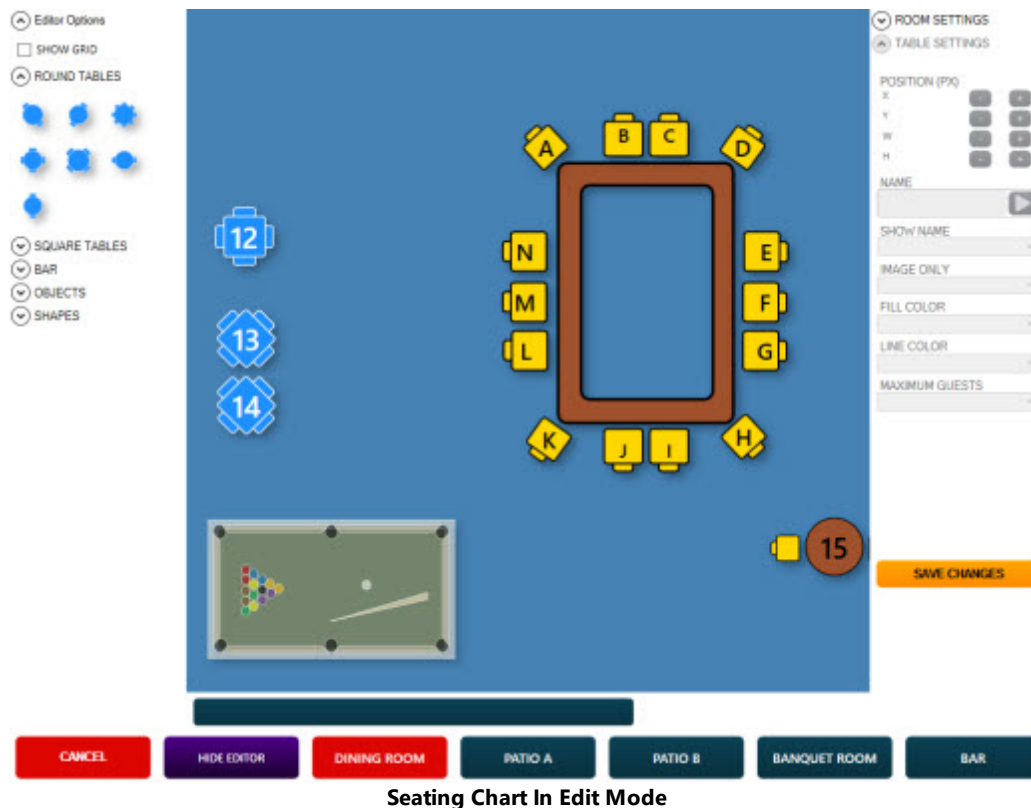
**Seating Chart Designer Permission**

The seating chart is composed of an unlimited number of images that can be dragged to any coordinates on the screen when the seating chart is in edit mode. When designing a seating chart, each image can be designated as "Image Only" so that it is only used for visual effect and cannot be selected. In the image below, the white wall at the right and brown bar in the center are not selectable when starting a new order. All other images are selectable.



**Seating Chart**

Press SHOW EDITOR to display the edit controls at the left and right. The expandable controls on the left contain images that can be dragged onto the seating chart. The controls on the right are used to change settings for the selected room and selected image.

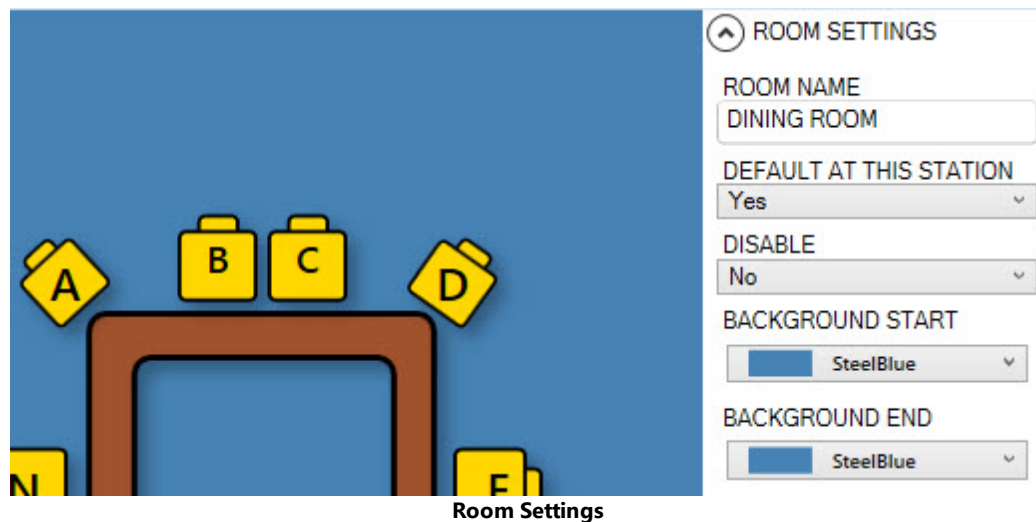


Seating Chart In Edit Mode

### Room Settings

Up to 5 rooms are available. Select the room from the bottom 5 buttons on the right to display the settings.

- **Room Name:** Enter the text to appear on the button
- **Default:** Set to Yes if this room should be displayed whenever a new dine-in order is started. This setting is specific to each pos station.
- **Disable:** Set to Yes to hide the room button when the seating chart is not in edit mode
- **Background Start:** Select the starting background color. The starting background color begins at the top left and blends with the ending background color to form a gradient.
- **Background End:** Select the ending background color. The ending background color begins at the bottom right and blends with the starting background color to form a gradient.



### Table Settings

Each image can be customized by selecting the image to display the available table settings on the bottom right.

- **Position:** The position of each image is specified by the x-y (left-top) coordinates and the size of each image is specified by the w-h (width-height) coordinates. Normally, these values are set by dragging or resizing the image with the mouse, but can also be edited manually by clicking the plus-minus buttons for better control.
- **Name:** Enter the name that should appear on the image, order entry screen, customer receipt and prep ticket.
- **Show Name:** Select Yes to display the table name on the image.
- **Image Only:** Select Yes if the image cannot be selected to start a new order.
- **Fill Color:** Select the background color for the image.
- **Line Color:** Select the border color for the image.
- **Maximum Guests:** Select the maximum number of guests normally seated at the table. For example, if it is a table for 2, the order entry screen guest selection button will display guest 1 of 2, where 2 is the maximum guests. This value can be overridden by setting the guest number for a specific order.

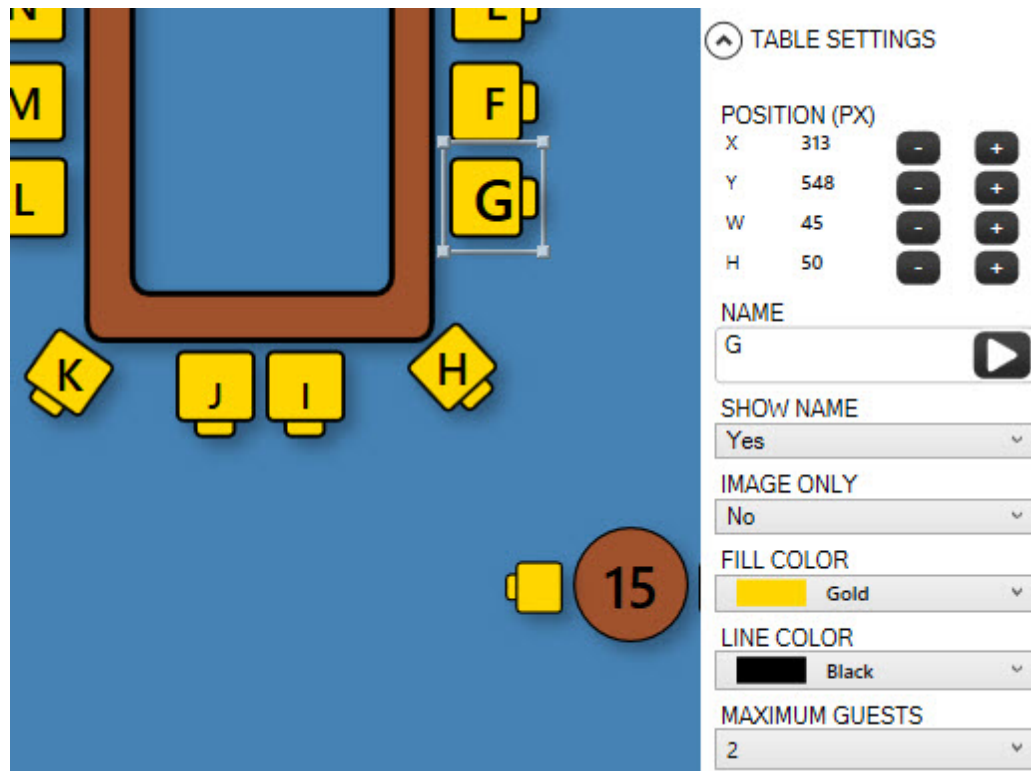


Table Settings

Click **SAVE CHANGES** to update the database. Note the the table borders correspond to the image size. Table placement is shown at the bottom left in pixels. To achieve exact placement, use the arrow buttons to nudge the table 1 pixel in any direction. Ensure that the tables do not overlap.

Part 32

# Server Banking



## 32 Server Banking

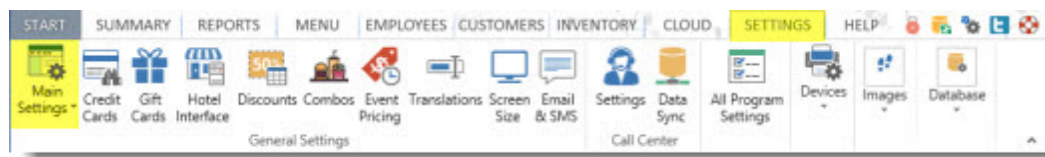
AmigoPOS includes an employee banking module for use when servers hold cash until the end of shift. Server banking can be used in combination with normal cash transactions. Available options include the ability to accept server deposits throughout the shift and the ability to deduct non-cash gratuities from the server's total liabilities.

Server banking configuration and usage is described below:

- [Configuration](#) <sup>1082</sup>
- [Order Check-In](#) <sup>1085</sup>
- [Server Deposits](#) <sup>1086</sup>
- [End Shift](#) <sup>1087</sup>
- [Gratuity Payout](#) <sup>1089</sup>
- [Server Bank Report](#) <sup>1090</sup>

### Configuration

Server banking is configured in **Back Office>Settings>Main Settings>Employee Banking**. Settings are shared between all pos stations.



**Back Office/Settings/ Main Settings**

The available options are:

- **Allow Server Deposits:** Set to Yes to accept server deposits on the manager screen
- **End Shift Print Server Report:** Set to Yes to automatically print the server liability report when the end shift is run
- **End Shift Server Auto Clock Out:** Set to Yes to automatically clock-out the server when the end shift is run. Set to No if the server is required to enter cash gratuities at clock-out
- **Server Banking:** Set to Yes to enable server banking
- **Server Banking Credit Card Tips Deduct Fee:** When using server banking, automatically deduct a fixed percentage for credit card tips (to offset credit card processing fees).
- **Server Banking Credit Card Tips Percentage:** Enter the percentage to deduct from credit card tips (to offset credit card processing fees).
- **Server Banking Deduct Gratuities:** When using server banking, deduct non-cash gratuities from server liabilities
- **Server Banking Deduct Mandatory Gratuities:** When using server banking, deduct mandatory gratuities from server liabilities
- **Server Banking Prompt Start Amount:** If server banking is enabled, setting this value to Yes will prompt the user to enter the bank start amount and source of funds when starting a shift
- **Server Report Show Mandatory Gratuities:** Set to Yes to itemize the sum of the mandatory gratuities collected by each driver on the server liability report
- **Server Report Show Tips Collected:** Set to Yes to itemize the sum of the tips collected by each server on the server liability report
- **Server Report order Details:** Set to Yes to itemize each order on the server liability report
- **Server Report Transaction Details:** Set to Yes to itemize the sum of transactions for each payment type on the server liability report. Set to No to show the cash total only
- **Server Job Type** <sup>1084</sup>: Select the permission name that corresponds with the server job type. Set this value to zero to show all users with orders for the current business day (not recommended when both server banking and [driver banking](#) <sup>664</sup> are enabled).

- **Server Gratuity Payout:** Select the cash paid out reason to use for server gratuity disbursements

Setting	Value
Allow Server Deposits	Yes
End Shift Print Server Report	Yes
End Shift Server Auto Clock Out	Yes
Server Banking	No
Server Banking Deduct Gratuities	Yes
Server Banking Deduct Mandatory Gratuities	Yes
Server Banking Prompt Start Amount	Yes
Server Gratuity Payout	SERVER TIPS
Server Job Type	SERVER
Server Payout Vendor	EMPLOYEE
Server Report Show Mandatory Gratuities	Yes
Server Report Show Tips Collected	Yes
Server Report Ticket Details	Yes
Server Report Transaction Details	Yes

**Allow Server Deposits**  
Set to Yes to accept server deposits on the manager screen

### Server Banking Settings

In addition, the **CASH BANK** payment type can be set to *Enabled* in Back Office/Settings/ Main Settings/Settle Screen to allow the server to check in a order so that it is no longer on the active orders list and the seating chart displays the table as available. Note that the order of the payment type buttons can be customized so that the CASH BANK button appears at the top of the list. The Allow Settle [permission](#) <sup>698</sup> must be set to Yes for the server job type (the Allow Cash permission can be set to No).

	DESCRIPTION	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON	OPEN DRAWER
	Account Payment	ACCOUNT PAYMENT	14	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Add Gratuity	ADD GRATUITY	3	<input type="checkbox"/>	<input type="checkbox"/>
	Cash	CASH	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Cash Bank	CASH BANK	9	<input type="checkbox"/>	<input type="checkbox"/>
	Cash Refund	CASH REFUND	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Check	CHECK	10	<input type="checkbox"/>	<input type="checkbox"/>
	Comp	COMP	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Credit Card	CREDIT CARD	2	<input type="checkbox"/>	<input type="checkbox"/>
	Credit Refund	CREDIT REFUND	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Debit Card	DEBIT CARD	3	<input type="checkbox"/>	<input type="checkbox"/>
	Foreign Currency	FOREIGN CURRENCY	7	<input type="checkbox"/>	<input type="checkbox"/>
	Gift Card	GIFT CARD	4	<input type="checkbox"/>	<input type="checkbox"/>

### Cash Bank Payment Type

Note: Only users with the Server job type are shown on the Add Server Deposit screen. If permissions have been changed from change the value for **Server Server Job Type** so that the correct job type appears on the drop-down list. The job type name may be different than the value shown below if new job types were defined.

The screenshot shows the 'Main Settings' window with the 'Employee Banking' tab selected. The 'Server Banking' sub-tab is active. The 'Server Job Type' is set to 'SERVER'. Below the table, there is a section for 'Allow Server Deposits' with a description: 'Set to Yes to accept server deposits on the manager screen'.

Setting	Value
Allow Server Deposits	Yes
End Shift Print Server Report	Yes
End Shift Server Auto Clock Out	Yes
Server Banking	No
Server Banking Deduct Gratuities	Yes
Server Banking Deduct Mandatory Gratuities	Yes
Server Banking Prompt Start Amount	Yes
Server Gratuity Payout	SERVER TIPS
Server Job Type	SERVER
Server Payout Vendor	EMPLOYEE
Server Report Show Mandatory Gratuities	Yes
Server Report Show Tips Collected	Yes
Server Report Ticket Details	Yes
Server Report Transaction Details	Yes

**Allow Server Deposits**  
Set to Yes to accept server deposits on the manager screen

Back Office/Settings/Main Settings/Employee Banking

Set this value to zero to show all employees with orders for the current business day (not recommended when both server banking and [driver banking](#)<sup>67</sup> are enabled).

The screenshot shows the 'All Program Settings' window. The 'Server Permission' is set to 28. The 'Server Payout Vendor' is set to 7. The 'Server Report Show Mandatory Gratuities' checkbox is checked.

Settings displayed on this screen are stored in the database and apply to all pos stations and back office workstations. Refer to the Peripheral or Main Settings screens for categorized settings and expanded descriptions.

Item name contains

Server Payout Vendor: 7

Select the paid out vendor id to use when entering a cash payout to offset the server non-cash gratuities or mandatory gratuities.

Server Permission: 28

Permission corresponding to server job type

Server Report Show Mandatory Gratuities: ☒

Set to Yes to itemize the sum of the mandatory gratuities collected by each driver on the server liability report

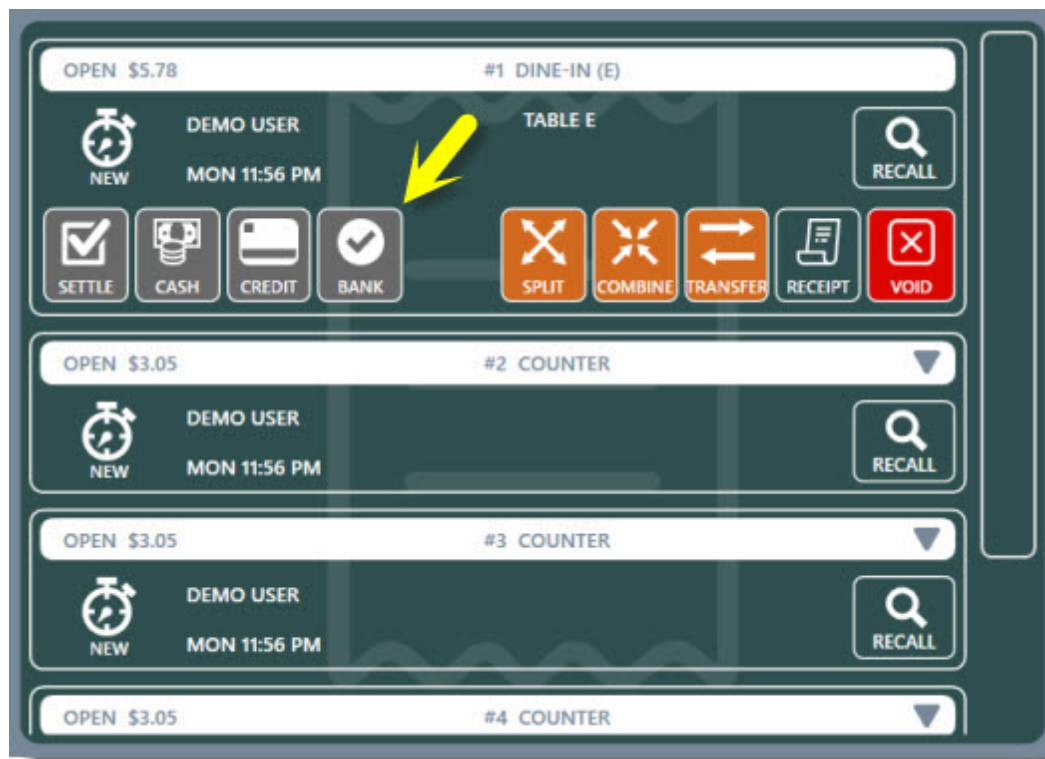
Back Office/Settings/All Program Settings

The value of any permission id is available by opening the permissions editor and hovering over the permission name. For example, the permission id for servers in the evaluation version database is 28, as show below.

### Permissions Editor

## Order Check-In

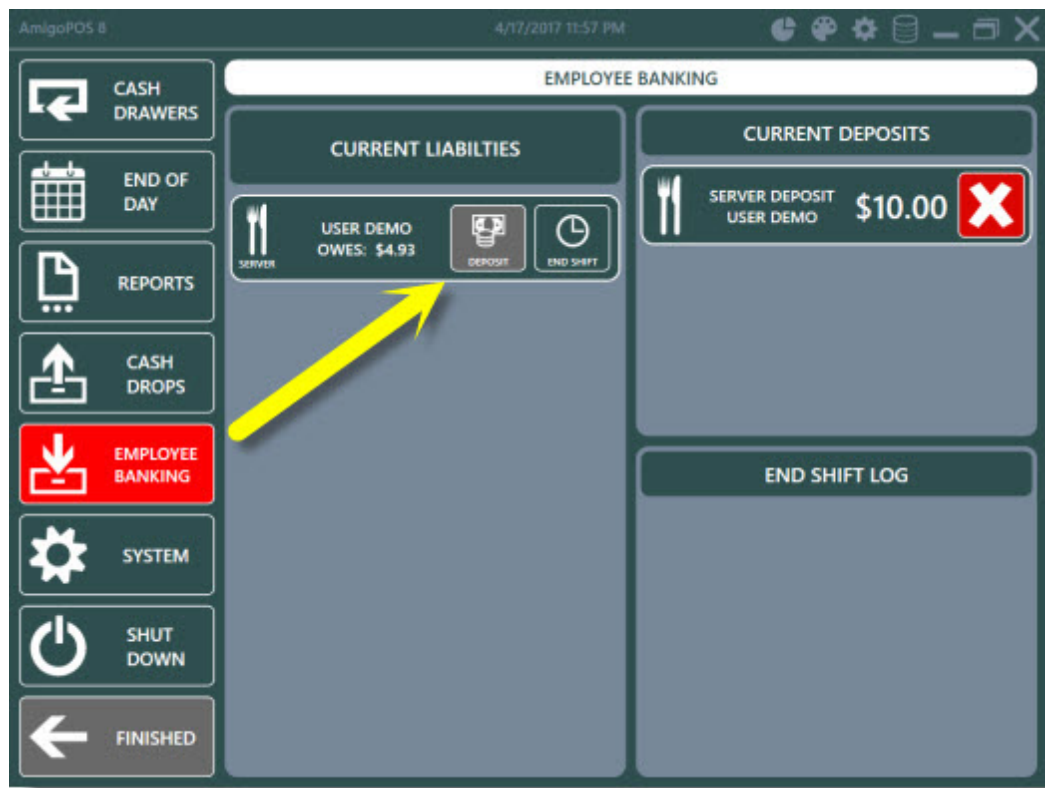
When using server banking, orders paid with cash are generally not settled until the end of the shift. The order must be "checked-in" to remove the order from the recall list and reset the table status on the seating chart. When an order is checked-in, no transactions are recorded in the database and the order is not settled. To check-in an order select the order on the recall list and click **SERVER BANK**.



Cash Bank

### Server Deposits

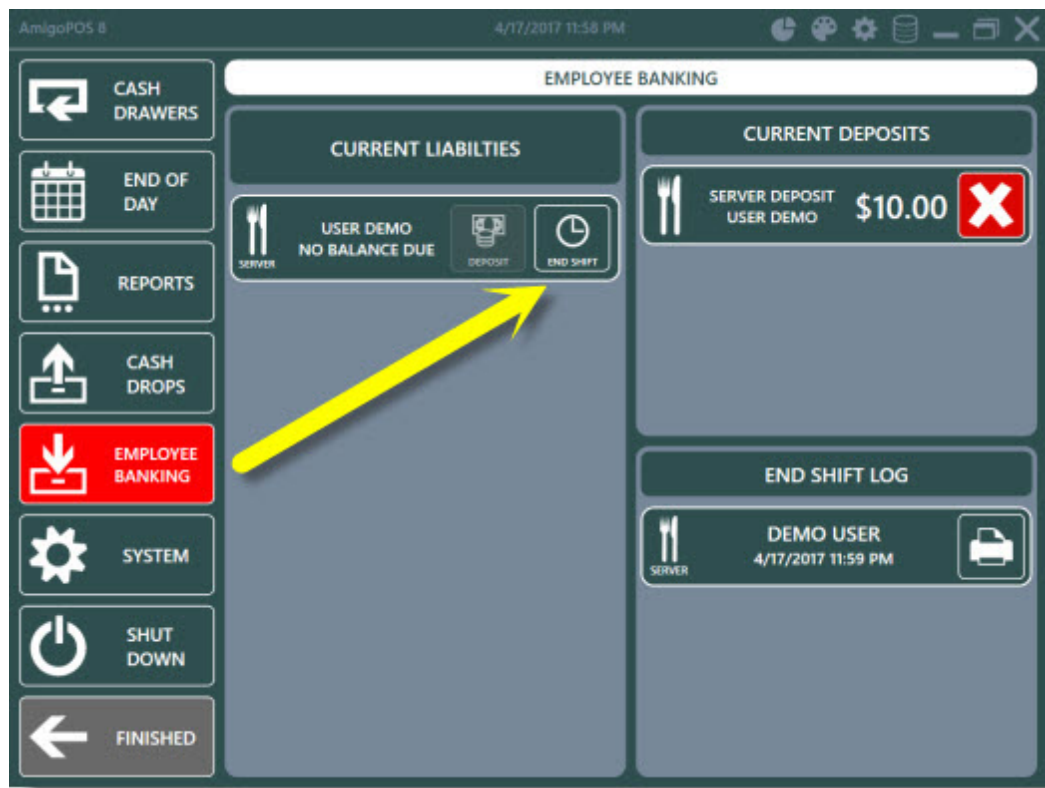
The server may wish to make deposits throughout the shift. Only a user with permission to access the manager screen can accept server deposits. Press the **Employee Banking** button at the top of the manager screen and select **Server Deposit/End Shift**. A list of server deposits for the current business day is shown. Press the **New Deposit/End Shift** button and select the server. Enter the deposit amount and press **Save Deposit**.



Server Deposit

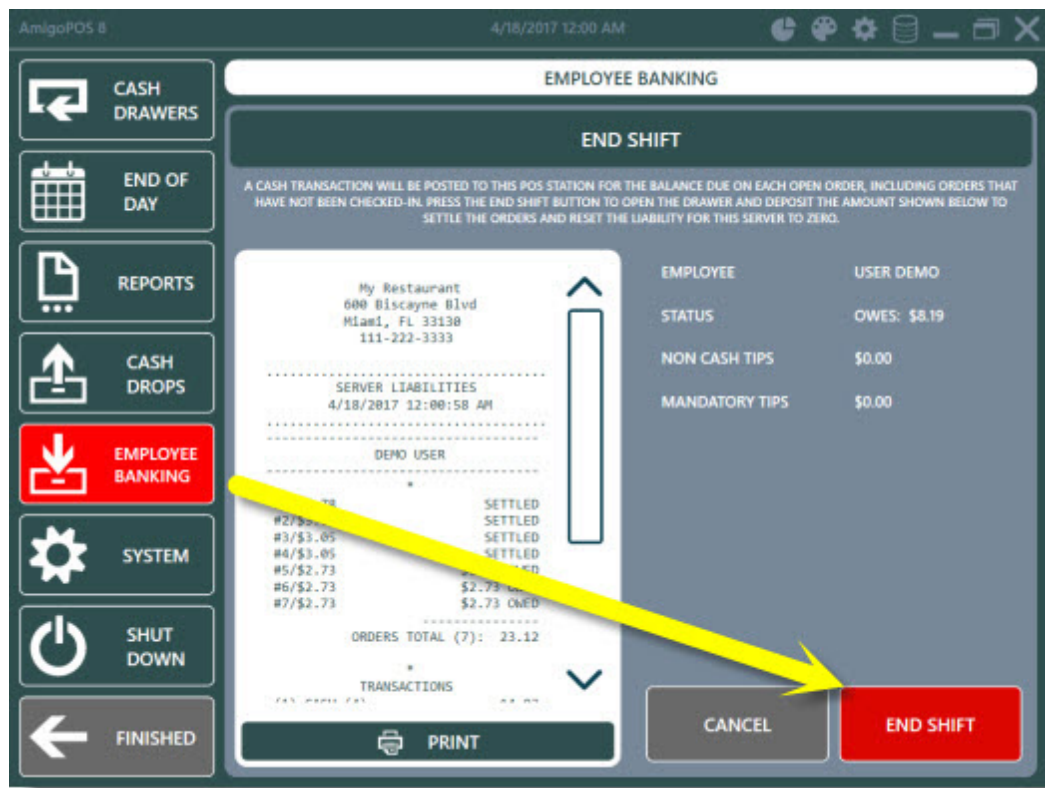
### End Shift

Each server's cash liability is determined by summing all checked-in and settled orders and deducting the sum of all transactions previously applied to those orders, server deposits and optionally deducting non-cash gratuities such as credit card tips (if enabled as described above). When the server's shift is completed, a manager can accept cash from the server for the server's liabilities and settle the balance due on each of the server's open orders. Login as manager and press the **Employee Banking** button on the manager screen.



### End Shift

A list of employees with the current business day liabilities is displayed. Click the END SHIFT button for the employee and the liability report is displayed and can be printed to the local receipt printer if required. When the server remits the total due, press the End Shift button to open the cash drawer. An individual cash transaction is entered for the balance due on each open order and each open order is subsequently settled.



End Shift

### Gratuity Payout

In order to offset the server's non-cash gratuities, if the non-cash gratuities total shown on the server bank report is greater than zero, a cash payout transaction is automatically recorded at the local pos station for the amount of the non-cash gratuities. The entry can be assigned a specific payout reason in the [configuration](#) <sup>1082</sup> settings shown above and will appear on the cash drawer report immediately after the server end shift is completed.



My Restaurant  
1 Main Street  
South Park, Co 00001  
111-222-3333

.....  
DRAWER REPORT  
POS STATION 1 - DRAWER 1  
  
GENERATED 1/5/2011 8:11:13 PM  
.....

DRAWER START AMOUNT  
\$100.00

.....  
CASH TRANSACTIONS  
CASH(2) \$9.45

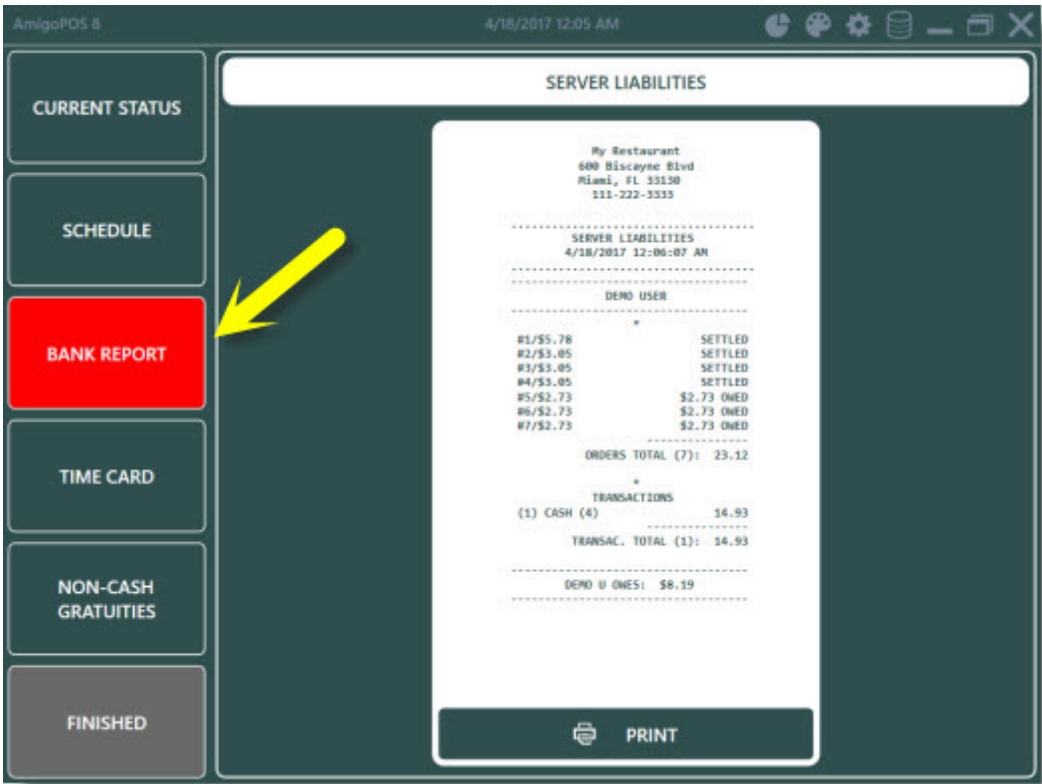
CREDIT CARD TRANSACTIONS  
(GRATUITIES NOT INCLUDED)  
CREDIT CARD(1) \$4.05  
.....

CASH PAYOUTS  
SERVER TIPS(EMPLOYEE) \$1.25

.....  
CASH IN DRAWER  
\$108.20  
.....

**Cash Drawer Report****Server Bank Report**

The server may obtain the liability report (identical to the report shown above) on the time clock screen, even if the time clock feature is not in use or the server is not clocked in. If the server does not have appropriate permissions to access the time clock, the manager can view the server's liability report at any time during the business day by logging in and navigating to Manager > Employee Banking > Server Deposit/End Shift.



Time Clock Server Bank Report

My Restaurant  
1 Main Street  
South Park, Co 00001  
111-222-3333

.....  
SERVER LIABILITIES

GENERATED 1/5/2011 8:12:25 PM  
.....

-----  
KRINGLE, KRIS  
-----

\*

3 ORDERS

#13/\$2.70	\$2.70 Owed
#14/\$6.75	\$6.75 Owed
#15/\$4.05	Settled

-----  
ORDERS TOTAL (3): 13.50

\*

TRANSACTIONS

(1) CREDIT CARD (1)	4.05
---------------------	------

-----  
TRANSAC. TOTAL (1): 4.05

\*

NON-CASH TIPS

(1) ORDER 15/CREDIT CARD	1.25
--------------------------	------

-----  
GRATUITIES TOTAL (1): 1.25

-----  
KRIS K. OWES: \$8.20  
-----

**Server Bank Report**

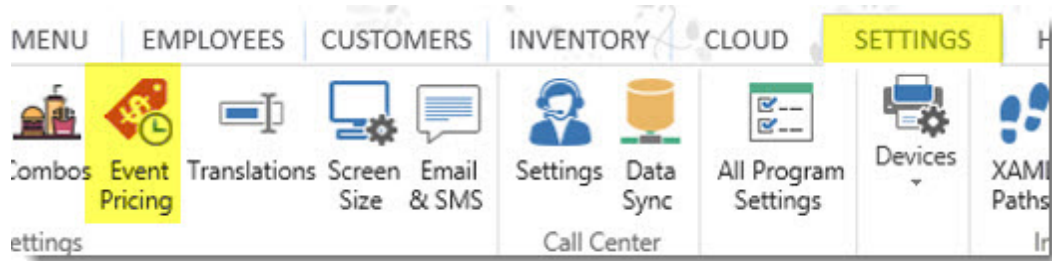
Part 33

# Special Event Pricing

### 33 Special Event Pricing

Some establishments impose a per-item surcharge for special events such as holidays, live music or charity auctions. AmigoPOS can automatically add the charge to each item as described below. In contrast with special pricing (i.e. happy hour pricing) where category or item discounts are defined, event pricing uses a single amount that is applied to all menu items.

Navigate to **Back Office>Settings** and click **Event Pricing** as shown below:



**Back Office/Settings/Event Pricing**

Event Pricing						
	DESCRIPTION	DISABLE	ENABLE METHOD	MENU TYPE	ADDITIONAL AMOUNT	
Click here to add a new row						
	House Band	<input checked="" type="checkbox"/>	Enable Manually	Bar Menu	\$1.00	Tuesday, September
	Charity Auction	<input checked="" type="checkbox"/>	Enable Manually	Regular Menu	-\$1.00	Tuesday, September
	New Years Eve	<input checked="" type="checkbox"/>	Automatic	All Menus	\$5.00	Friday, December 3

**Event Pricing List**

Click on the top row to add a new event price definition.

Event Pricing						
	DESCRIPTION	DISABLE	ENABLE METHOD	MENU TYPE	ADDITIONAL AMOUNT	
<input checked="" type="checkbox"/>		<input type="checkbox"/>	Enable Manually	All Menus	\$0.00	Tuesday, April 18, 2
	House Band	<input checked="" type="checkbox"/>	Enable Manually	Bar Menu	\$1.00	Tuesday, September
	Charity Auction	<input checked="" type="checkbox"/>	Enable Manually	Regular Menu	-\$1.00	Tuesday, September
	New Years Eve	<input checked="" type="checkbox"/>	Automatic	All Menus	\$5.00	Friday, December 3

**New Event Price Definition**

**Each field is described below:**

- **Event Name:** This field is required for all events. The name will be used on the order entry screen (and manager screen for manually enabled events)
- **Enable Method:** two types of events are available, manual and automatic. Manual events are enabled by selecting the event on the Manager screen, as described below. Automatic events are in use when the current date/time falls within the specified time range.
- **Amount:** the amount to add to (or deduct from) the menu item's regular price. Enter a negative amount with a minus sign to decrease the regular price.

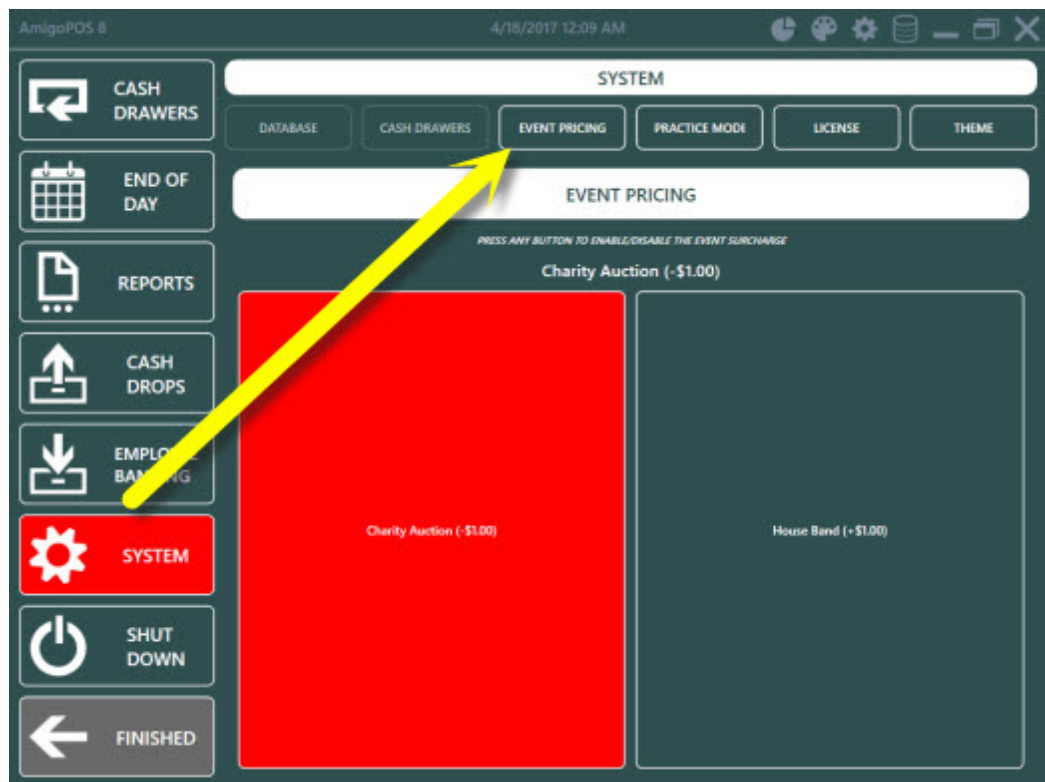
- Menu Type: Select all menus, regular menu or bar menu. Individual menu items can be excluded from event pricing, as described below
- Start: The event's start date/time. This value is used only when the Enable Method is set to Automatic.
- Finish: The event's finish date/time. This value is used only when the Enable Method is set to Automatic.
- Disable: This value is used to disable events. Manual events can be enabled on the Manager screen.
- Show on manager screen: The manager screen can display up to 8 Manual event definitions, as shown below.

#### Notes:

- When an automatic event is active and a manual event is simultaneously enabled, the manual event will be used.
- When 2 automatic events are active, only the first (in alphabetical order) will be used.
- When 2 manual events are active, only the first (in alphabetical order) will be used.
- Negative amounts are displayed within parentheses in the Amount column on the Event Pricing screen.
- Disabled events are shown with a red background on the Event Pricing screen.
- Double-click on any event to edit the event; right-click on any event to view available options.
- Event pricing for all pizza menu items can be disabled by setting the value of the [ChargeEventPricingForPizzaMenu](#) setting to No in Back Office > Configuration > All Program Settings > Yes/No Settings

#### Manager Screen

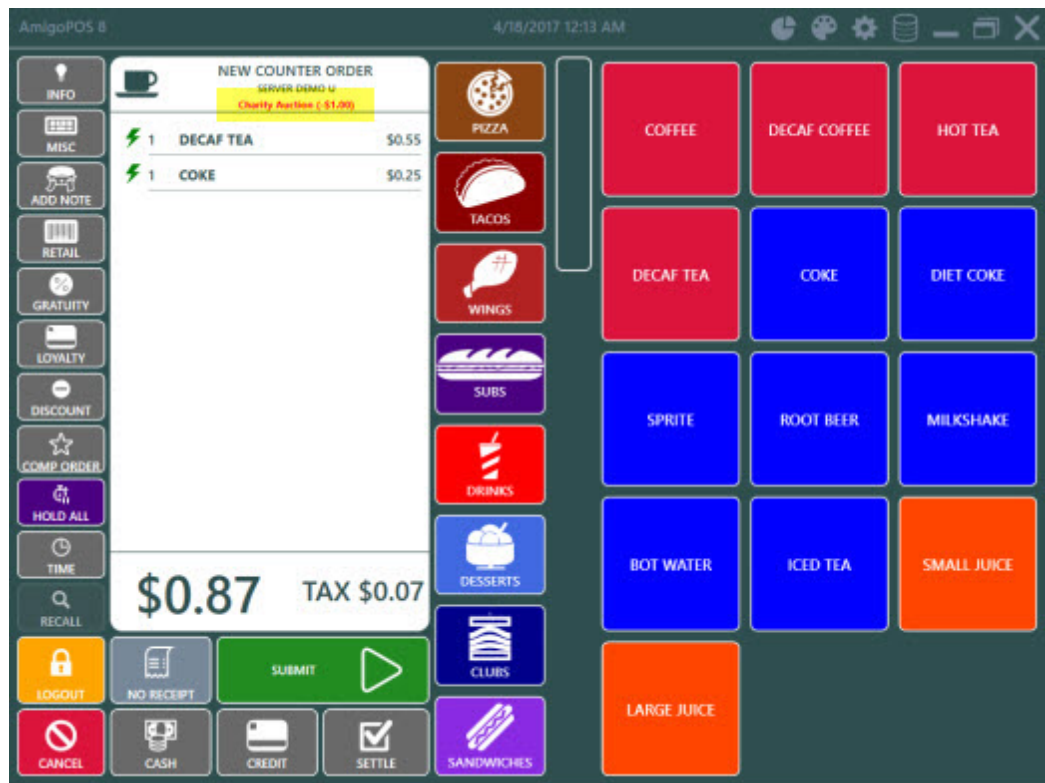
Manually enabled events are shown on the Manager screen if the Show on manager screen box is checked. To manually enable a manual event, open the manager screen and press System > Event Pricing. Press the event button to enable the event. Press the button again to disable the event. Only one event can be active at any time. The current active event, if any, is shown with a red background above the event buttons. If the event pricing button is not visible, set the value for the [ShowEventPricingOnManagerScreen](#) setting to Yes in Back Office > Configuration > All Program Settings > Yes/No Settings.



Manager Screen

#### Order Entry Screen

No additional user action is required when event pricing is active. Prices are increased (or decreased) automatically as each menu item is selected. The order information header is shown with a red background and contains the event name to remind the user that event pricing is in effect.



Order Entry Screen

### Exclusions

Any individual regular or bar menu item can be excluded from event pricing by checking the box under the Exclude From Event Pricing column on the menu items or bar menu items grids.

**Menu Items** x

1 APPETIZERS

Add a new menu item x +

Item name contains x

FRENCH FRIES (1)

ONION RINGS (2)

**Main Settings** Button Special Pricing Modifiers Inventory Nutrition

General Settings

Online Ordering

**Pricing**

Price	1.75
Tax Rate	9% (ID:1/Sales Tax)
Revenue Center	FOOD
SKU	0
Retail Inventory	Add Inventory Item
PLU	0
Sold By Weight	<input type="checkbox"/>
Price By Weight Multiplier	1
Price By Weight Suffix	
Container Charge	0
Exclude From Special Pricing	<input type="checkbox"/>
<b>Exclude From Event Pricing</b>	<input checked="" type="checkbox"/>
Exclude From Discounts	<input type="checkbox"/>

**Exclude From Event Pricing**  
Set to Yes to exclude this menu item when event pricing is enabled

#### Excluding Menu Items From Event Pricing



Part 34

# Special Pricing

## 34 Special Pricing

Special pricing based on time and weekday is available for regular and bar menu items. Special price definitions can be set for individual menu items using the menu item editor or the special pricing grid. Bar menu special price definitions can be defined for individual menu items or all items in a bar menu category.

### Regular Menu Item Specials

Open the menu item editor for any regular menu item and select the special pricing tab. In the example below, the western omelet is assigned a special price of \$5 every day from 5AM-12PM.

The screenshot shows the 'Menu Items' editor with the 'Special Pricing' tab selected. On the left, a list of menu items is shown, with 'WESTERN OMELETE (1)' selected. The main area displays a grid for special pricing definitions.

Type	Amount	Percent	Day	Start	End	Disable
+ Click here to add a new row						
Fixed	\$5.00		All	5:00 AM	12:00 PM	<input type="checkbox"/>

The following fields are displayed on the special pricing grid:

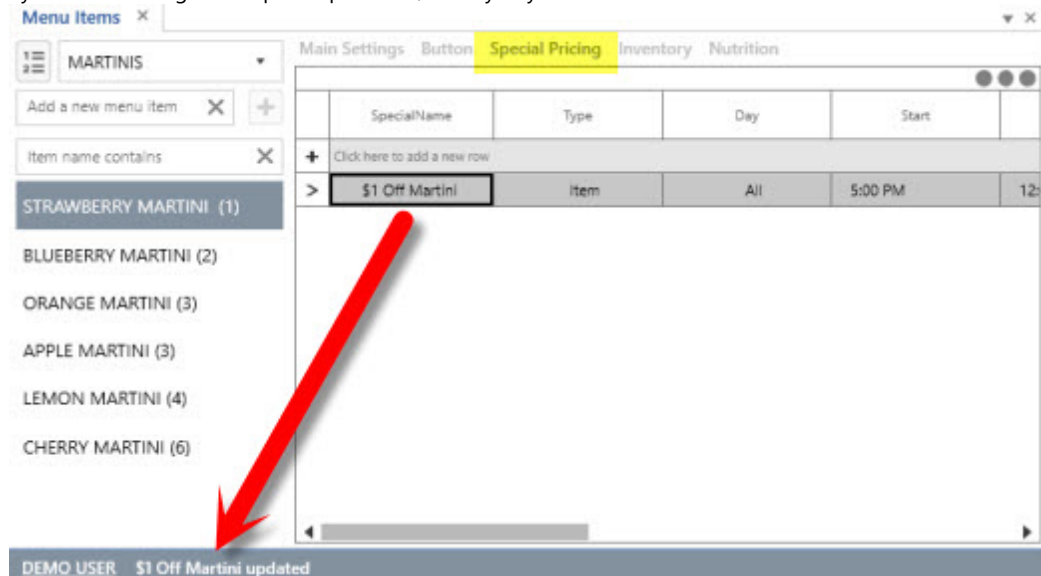
- **Method:** Specify whether the amount is fixed or percentage. A fixed amount indicates that the regular price will be replaced by the special price amount when the special price is in effect. A percentage amount indicates that the percentage will be deducted from the regular price when the special.
- **Amount:** Enter the amount which will **replace the regular price**. Applies only to fixed special price definition type.
- **Percent:** Enter the amount which will be **deducted from the regular price**. Applies only to percentage special price definition type.
- **Day:** Specify whether the special is in affect every day or for a single day.
- **Start:** Enter the time of day when the special price begins.
- **End:** Enter the time of day when the special price ends.
- **Disable:** Check the box to disable the special price definition.

After adding or editing a special price definition, update the database and test the special price by adding the item to the order. If the special is in effect, a note with the original price will appear in red text below the item name.

The screenshot shows the 'NEW COUNTER ORDER' screen. The item 'B-B-Q BURGER' is added to the order with a regular price of \$5.75. A special price of \$5.18 is applied, indicated by a yellow highlight and a red note: 'SPECIAL PRICE (REGULAR PRICE \$5.75)'. The screen also shows a sidebar with various icons (INFO, MISC, ADD NOTE, RETAIL) and a 'SELECT' button on the right.

### Bar Menu Item Specials

Open the menu item editor for any regular menu item and select the special pricing tab. In the example below, the strawberry martini is assigned a special price of \$1 every day from 5PM-12AM.

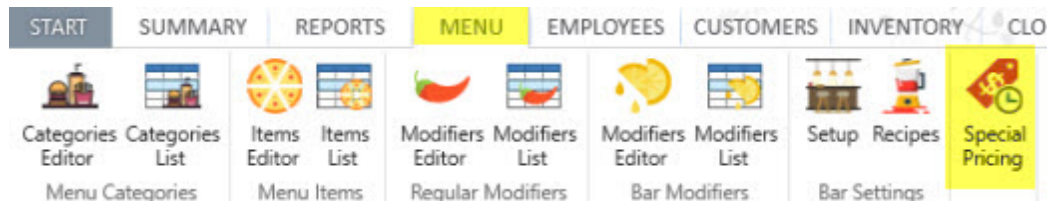


The following fields are displayed on the special pricing grid:

- **Day:** Specify whether the special is in affect every day or for a single day.
- **Start:** Enter the time of day when the special price begins.
- **End:** Enter the time of day when the special price ends.
- **Method:** Specify whether the amount is fixed or percentage. A fixed amount indicates that the regular price will be replaced by the special price amount when the special price is in effect. A percentage amount indicates that the percentage will be deducted from the regular price when the special.
- **Amount:** Enter the amount which will **be deducted from the regular price**. Applies only to fixed special price definition type.
- **Percent:** Enter the amount which will be **deducted from the regular price**. Applies only to percentage special price definition type.
- **Disable:** Check the box to disable the special price definition.

### Special Pricing Grid

Special price definitions can be quickly added and edited by using the special price grid in **Back Office > Menu > Special Pricing**.



Regular menu special definition fields are identical to the fields in the menu item editor described above.

Specials ×

Regular Menu ▼

	Item	Method ▲	Amount	Percent	Day	Start	End	Disable	
+	Click here to add a new row								
	B-B-Q BURGER	Percentage		10 %	All	12:00 AM	12:00 AM	<input type="checkbox"/>	✖

Bar menu special definition fields are identical to the fields in the menu item editor described above but includes an additional Type field that can be used to assign the special to an individual bar menu item or to all items in a bar menu category.

Specials ×

Bar Menu ▼

	SpecialName	Type	Category	Item	Day	Start	End	Method	Amount	Percent
+	Click here to add a new row									
	\$1 Off Well	Category	WELL		All	5:00 PM	11:00 AM	Fixed	\$1.00	

Part 35

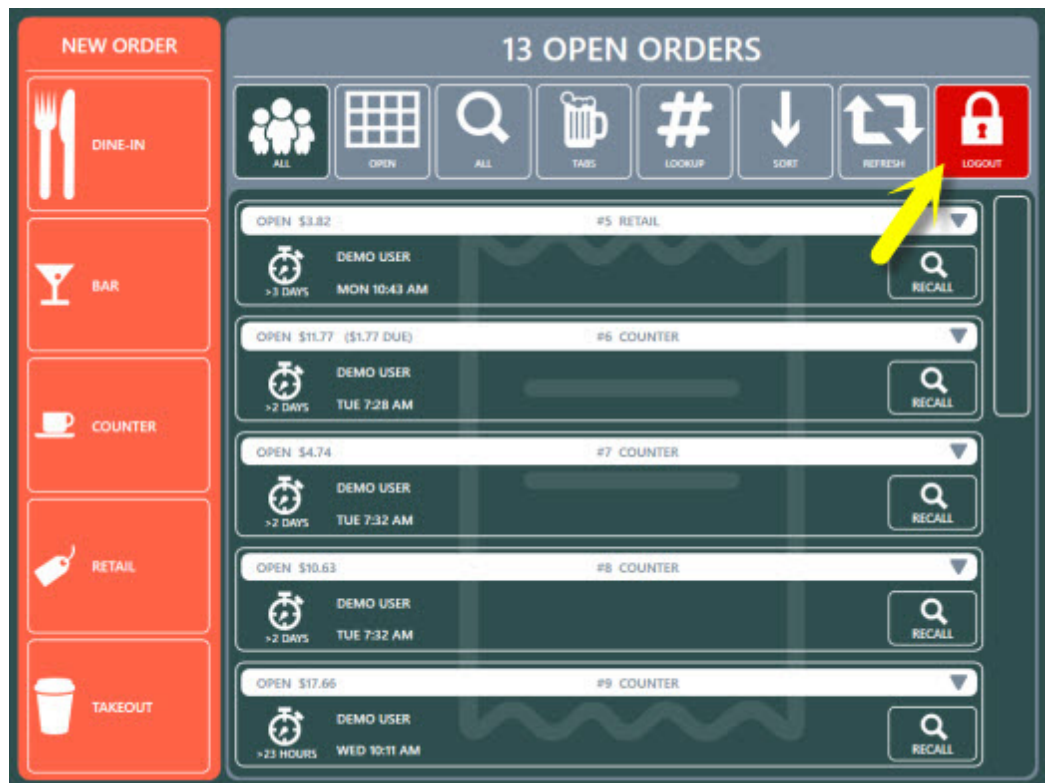
# Tablet Edition

## 35 Tablet Edition

### 35.1 Tablet Server

#### Overview

The tablet user interface is a lightweight edition of AmigoPOS intended to run on 7" (or larger) Windows 8.1 tablets. The AmigoPOS Tablet Server is used to print customer receipts and prep tickets for orders submitted from the tablet user interface. An unlimited number of tablets can be run from a single tablet server license.



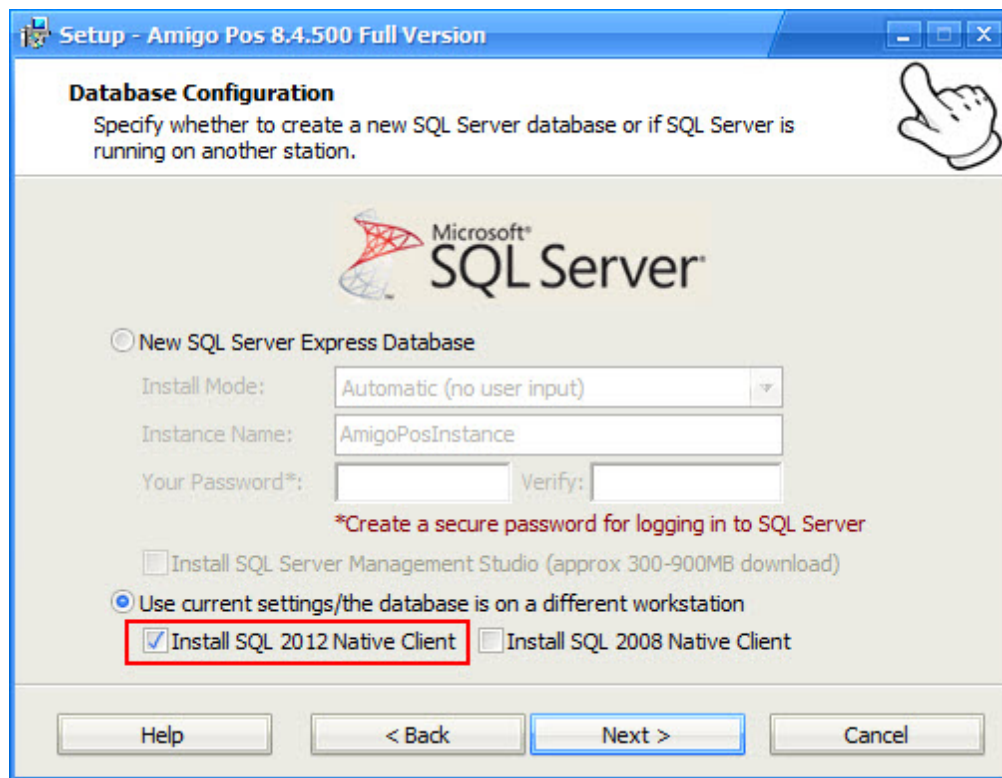
Amigo Pos Tablet User Interface

#### Installation

The tablet user interface and tablet server are installed by default. The tablet server should be run at the main pos station after the [receipt printer](#)<sup>[24]</sup> and [prep printers](#)<sup>[159]</sup> have been configured in **Back Office>Peripherals**.

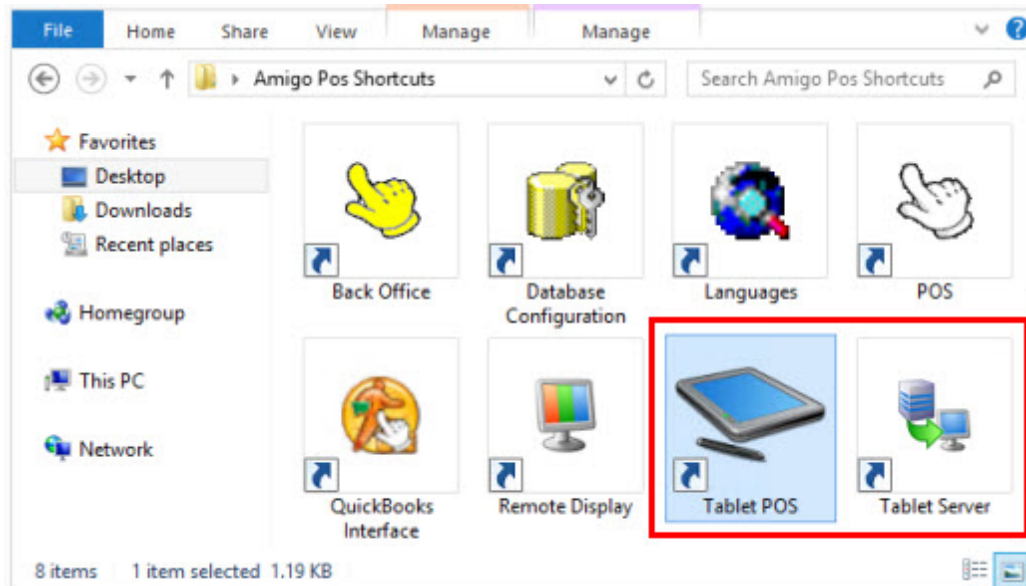
#### Setup

Verify that each tablet is connected to the local network and install AmigoPOS on each tablet. On the database setup screen, choose **Use current settings/the database is located on a different workstation** and check the box to install SQL 2012 Native Client. After installation, reboot and run the Database Configuration Utility from the desktop shortcuts folder. Set the same database connection parameters used at any other pos station. Close the Database Configuration Utility and run the tablet user interface from the desktop shortcut. Note that the tablet user interface does not require a license.



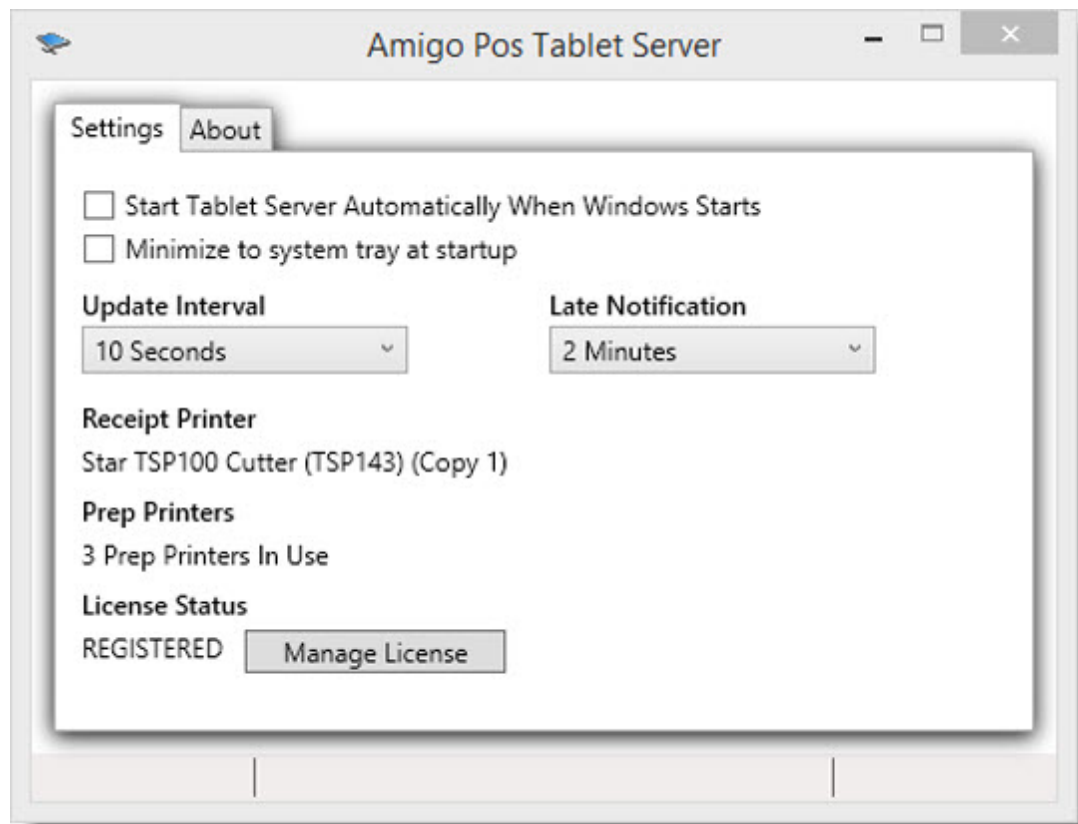
Amigo Pos Installer

The desktop shortcuts folder contains a shortcut for the tablet user interface (AmigoPOS Tablet UI) and the tablet server. Add the AmigoPOS Tablet UI shortcut to the Windows Startup folder at each tablet so that the tablet user interface is launched automatically at startup. Add the Tablet Server shortcut to the Windows Startup folder at the main pos station so that the tablet server is started automatically at startup.



Desktop Shortcuts Folder

The tablet server's database connection parameters, receipt printer and prep printers are configured in AmigoPOS Back Office. Run the tablet server at the main pos station and verify that the receipt printer and the correct number of prep printers are listed.

**Amigo Pos Tablet Server**

Click Manage License to open the Activation Utility. Refer to the order confirmation email for the order id and submit the license request to receive a serial number. Restart the tablet server after the serial number is retrieved to complete activation.

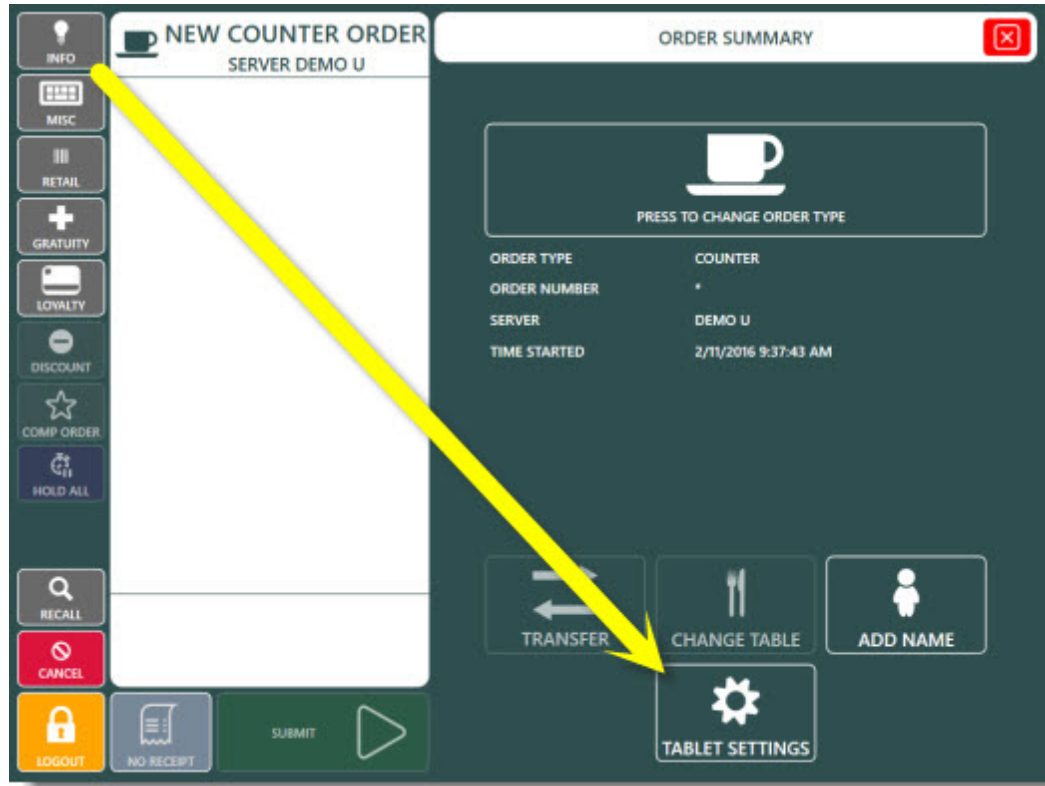
The screenshot shows the 'TABLET SERVER ACTIVATION UTILITY' window. It has a title bar with a close button. A prominent red banner at the top reads 'NO LICENSE'. Below this, there are labels for 'INSTALLATION ID:' and 'WINDOWS NAME:' followed by empty text input fields. Further down, there are labels for 'BUSINESS NAME:', 'ORDER ID:', 'PURCHASED FROM:', 'EMAIL:', and 'SERIAL NUMBER:', each followed by a text input field. A right-pointing arrow button is located to the right of the 'SERIAL NUMBER' input field. At the bottom of the window are two buttons: 'MANUAL ACTIVATION' and 'ONLINE ACTIVATION'.**Activation Utility**



**POS Settings**

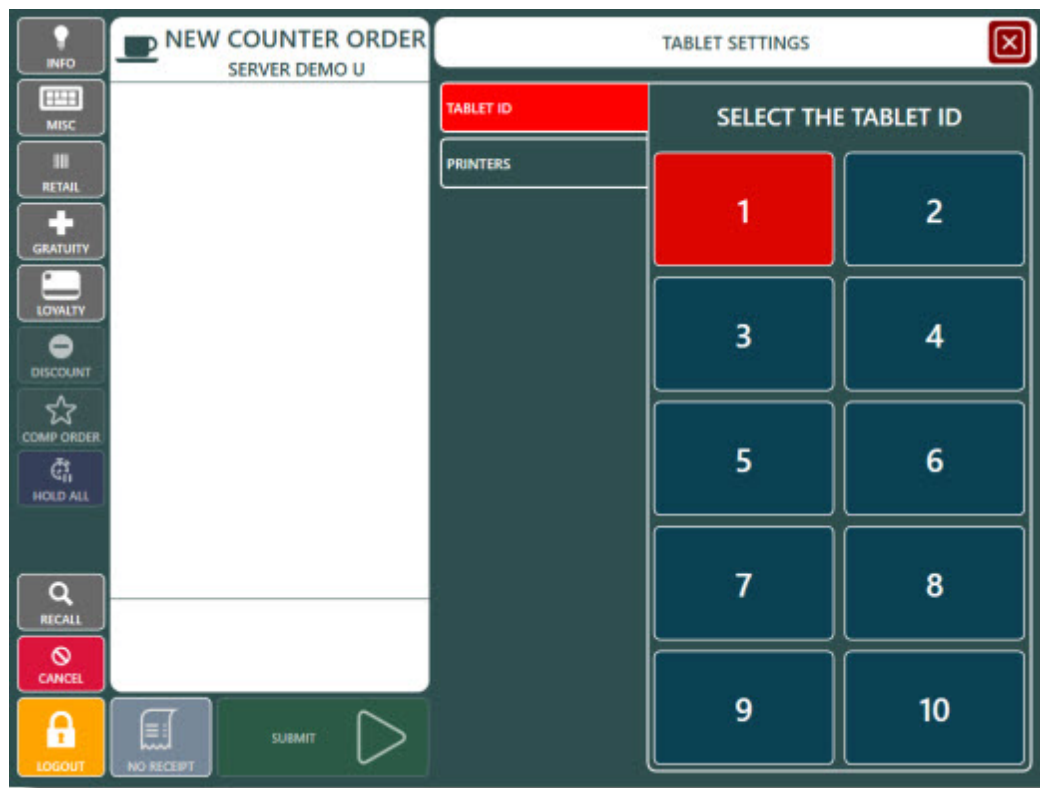
Most settings are shared and stored in the database so that each tablet does not require configuration. The following settings are set at each tablet:

- [Tablet ID](#) <sup>1106</sup>
- [Prep Printer Mapping](#) <sup>1107</sup>



**Order Summary Screen**

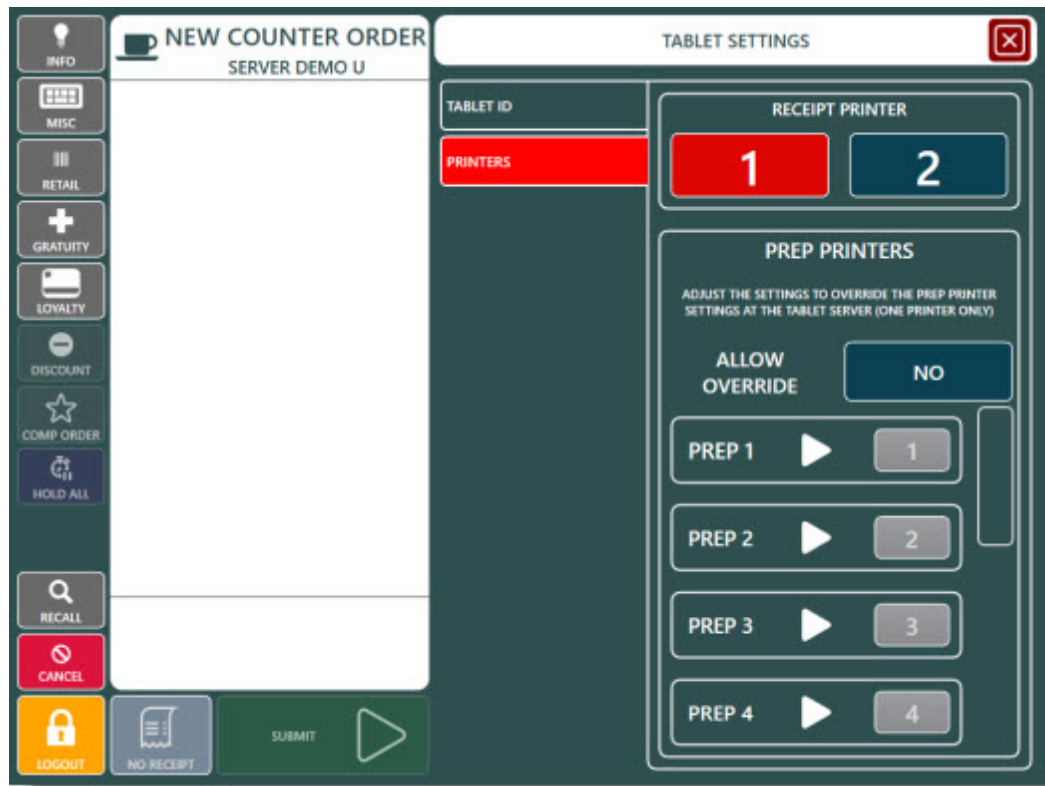
**Tablet ID:** The tablet identifier used to print on reports, prep tickets and on the remote display.



**Tablet ID Setting**

**Prep Printer Mapping:** Each tablet has the ability to override the default prep printer settings at the tablet server. This is useful for large restaurants with multiple bars and/or drink stations so that the drink order is routed to the prep printer that is closest to the customer. Press the button to increment the destination prep printer id (the maximum destination printer id is 10 and will start again at 1).

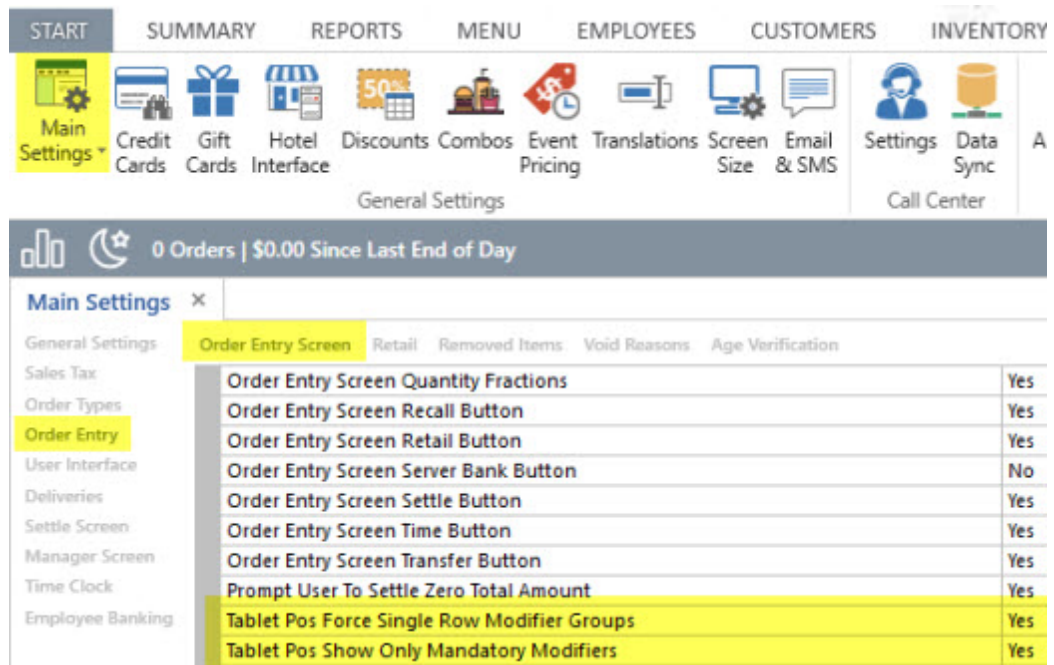
**Receipt Printer Override:** Each tablet has the ability to override the default receipt printer settings at the tablet server. This is useful for large restaurants so that the customer receipt is routed to the receipt printer that is closest to the customer. Select button 1 to use the default receipt printer or button 2 to use the 2nd receipt printer. Note that Receipt Printer 2 must be installed at the station running the tablet server in order to override the receipt printer settings.



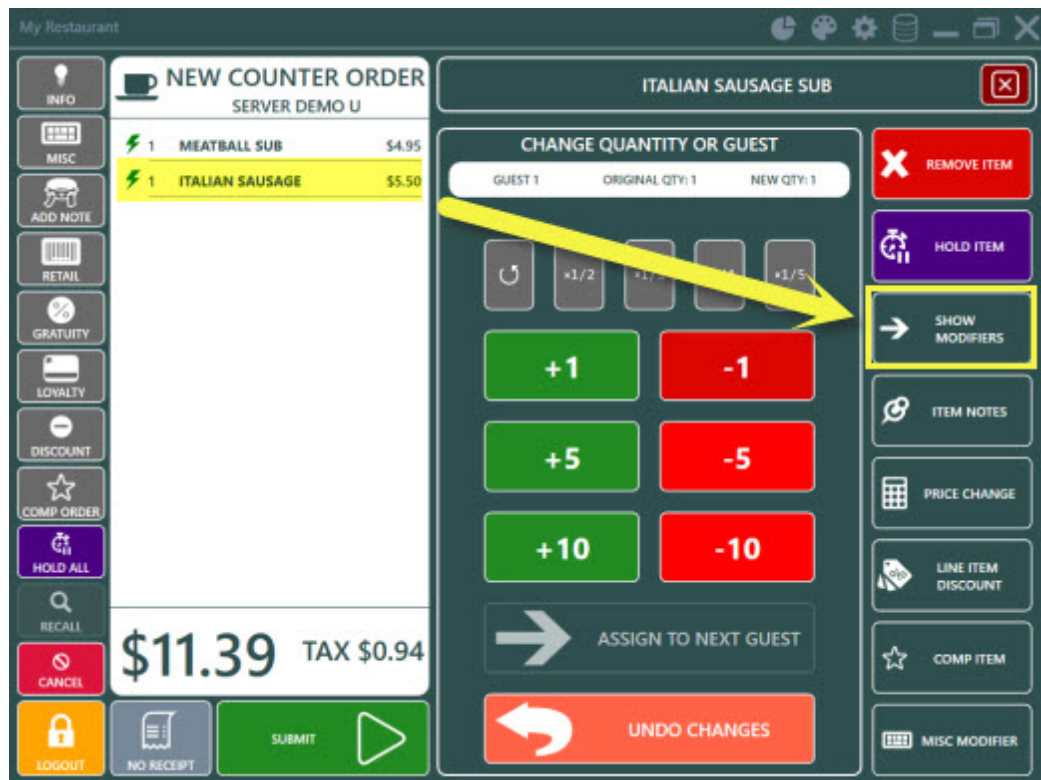
Customer Receipt and Prep Printer Override

### Modifier Groups

For best performance, non-mandatory modifier groups can be suppressed by setting **Tablet Pos Show Only Mandatory Modifiers** to **Yes**. In addition, set **Tablet Pos Force Single Row Modifier Groups** to **Yes** so that the buttons are large enough on the smaller tablet user interface.



Non-mandatory modifiers can be viewed by selecting the order item followed by Show Modifiers.

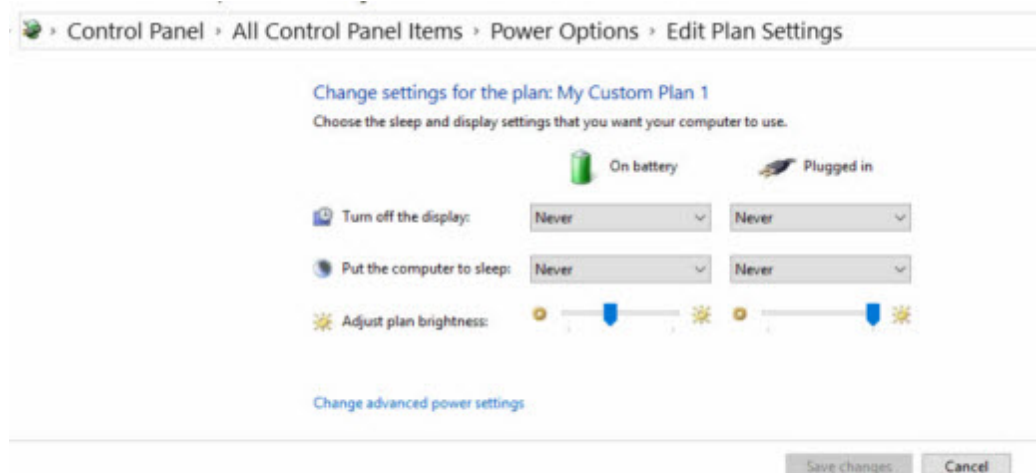
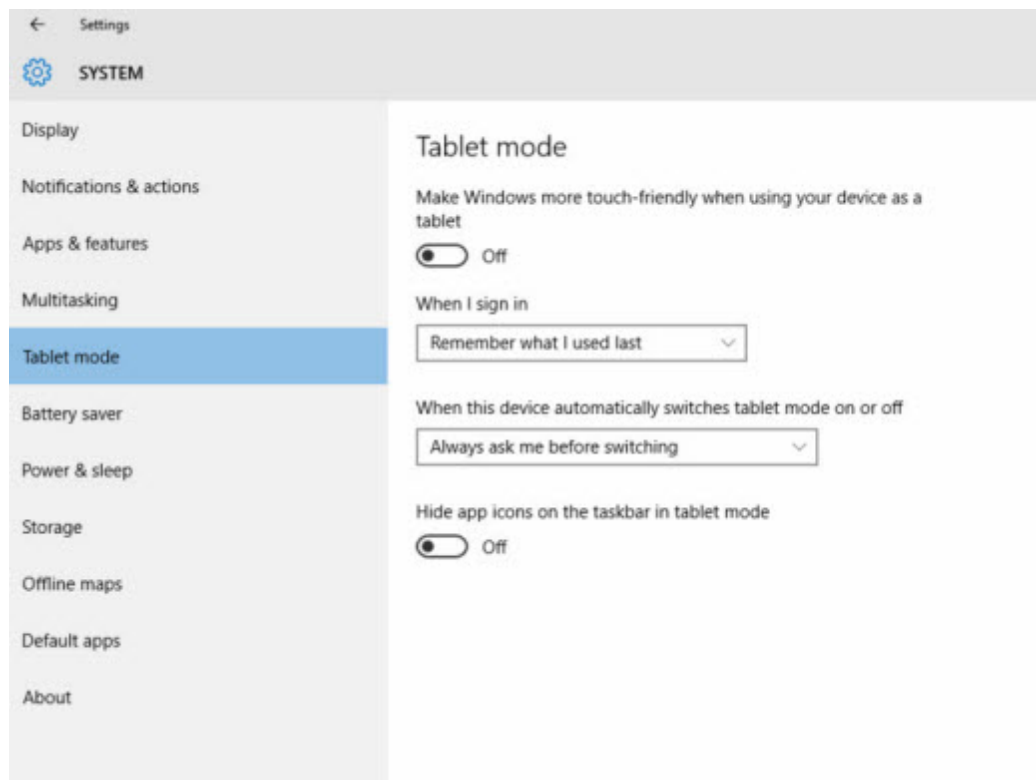


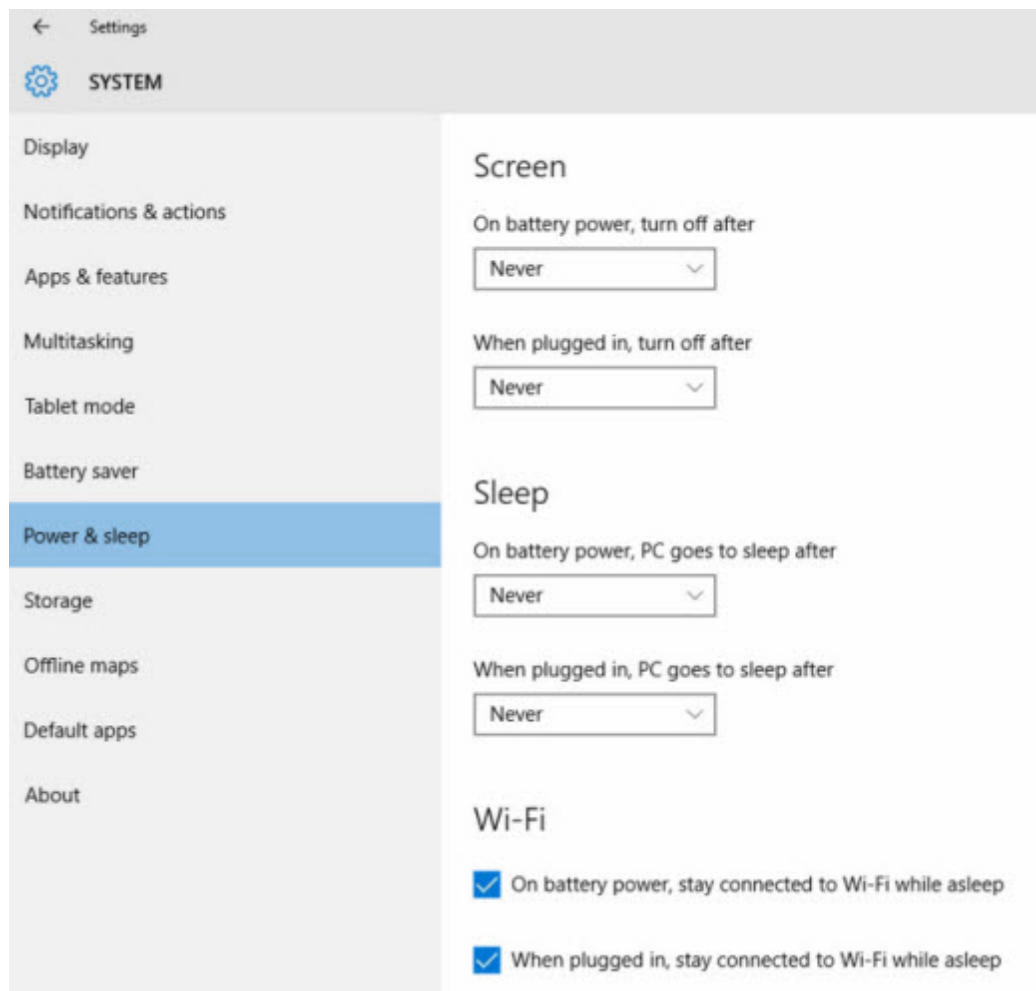
#### Usage

The tablet user interface order entry procedure is identical to the regular user interface. Customer receipts are printed at the station running the tablet server and prep tickets are printed from the station running the tablet server. Note that there may be a slight delay in printing customer receipts and prep tickets, allow up to 10 seconds depending on the Update Interval and the number of tablets in use.

## 35.2 Windows Tablet Notes

The following settings can be customized on Windows 10 tablets to ensure that the tablet does not enter sleep mode when powered on.





Part 36

# Troubleshooting

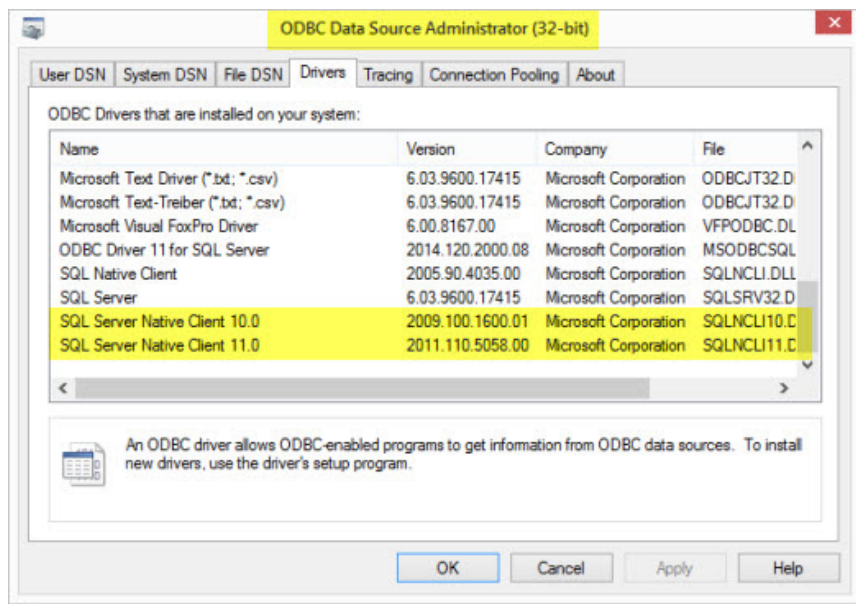
## 36 Troubleshooting

### 36.1 Common Issues

Below are a list of common errors that may be encountered when installing or using AmigoPOS:

**Issue: Unable to connect to SQL Server Express running on a different PC**

- If you have already referred to the [installation and initial setup help topics to confirm](#) that Named Pipes protocol is enabled, Firewalls are properly configured, etc. and you still receive a connection error (generally with the word *Provider* in the description), the local PC may have an outdated SQL Native Client database driver. Referring to the image below, ensure that **SQL Server Client 11.0 or later** is installed. The ODBC Data Source Administrator can be accessed in **Windows Control Panel > Administrative Tools > Data Sources (ODBC)**. Although AmigoPOS attempts to install the latest SQL Native Client silently at installation, it is sometimes not successful on computers with previous version installed and must be downloaded and installed manually [here](#) (scroll down to Microsoft SQL Server 2012 Native Client).



SQL Server Native Client

**Issue: Unable to print customer receipts or prep orders**

- Verify that AmigoPOS is properly licensed on the manager screen by pressing System > License buttons. If the Licensing button is not visible, follow the instructions in the order confirmation message to license the application.

**Issue: The business name or menu item names are not printing correctly on the customer receipt, mini reports, etc.**

- Some special characters cannot be used in item names. Verify that there are no apostrophes, commas, percent signs, etc.

**Issue: Long delay after Submit button is pressed**

- When the submit button is pressed on the order entry screen, the order should be processed, the customer receipt sent to receipt printer and the prep ticket(s) sent to prep printers within 1-2 seconds. If the delay is longer, the most likely reason is that remote printers are not properly configured. If the remote printer is not found, AmigoPOS will attempt to send the print job to the default Windows printer. If that printer is also offline, a delay will occur. If the default printer is a network printer, an exceptionally long delay may occur. To verify that the delay is caused by printer configuration, temporarily disable the local receipt and remote printers in back office, then start a new order and press the Submit button. To solve this issue, ensure that the remote printer settings are correct. In addition, you may wish to disable the setting for **Use default printer when this printer is offline** on the receipt/prep printer setup screens (this value affects both the receipt & prep printers).



**Issue: Seating chart tables do not appear with red background when the table is in use**

- Using the AmigoPOS image editor, ensure that the proper transparency color is selected for each table image. The transparency color is the background color of the image, which will turn red when the table is in use.

**Issue: Receipt printer output is not legible or improperly formatted**

- Parallel port receipt printers are recommended for ease of setup and reliability. If you are using a printer with a parallel port, the most likely cause of improperly formatted text is the **Printer Type** setting. Ensure that the correct type is selected (Epson or Star) and try again. If using a serial port and you are certain that the correct printer type is selected, confirm that you are using the correct cable and that the serial port settings on the pc match those on the printer. Many USB printers require a driver that runs as a Windows service. If your USB interface printer is not printing correctly, ensure that the printer driver application is not intercepting and reformatting the data sent to the printer. For maximum speed, AmigoPOS uses raw printer commands specific to the printer type. For remote printers, one possible cause of printer errors is network print server configuration.

**Issue: I have accidentally deleted all user permissions and can't log in to back office**

- For security, users are not allowed to modify employee permissions unless they have access to back office. If you have accidentally deleted all employee permissions, send a compressed copy of your database support personnel, who will quickly add appropriate permissions and return the database to you. The database location can be found by running the Database configuration utility from the AmigoPOS> program group in the start menu.

**Issue: Full size reports in back office are only 3 inches wide.**

- The screen (and print) size of full sized back office reports are based on the default paper size of the default Windows printer. Select a full size printer as the default printer to display reports correctly. If no full size printer is available, use the Microsoft Office Document Writer as the default printer or install a generic/text only printer by using the Add Printer function in the Windows Printer and Faxes folder and set it as default printer.

**Issue: I have changed the order type or order entry settings in back office and now the order entry screen does not respond to mouse clicks**

- If you have assigned a specific menu to an order type but that menu is disabled, errors may occur when selecting the order type. For example, if the pizza menu is disabled but is set as the default menu type for delivery orders, the disabled pizza menu will appear when starting a delivery order. To correct this issue, select an active menu as default for the order type and try again.

**Issue: I am able to test my OPOS device using the manufacturer utility, but not in AmigoPOS**

- First, ensure that no other application is attempting to use the same device and try again. If the issue is not corrected, the manufacturer's OPOS configuration utility may have installed older OPOS drivers over the new OPOS drivers installed with AmigoPOS. Most manufacturer configuration utilities show the version of the OPOS driver in use. AmigoPOS uses version 1.12.901 (as of November 2008). If the manufacturer's OPOS configuration utility is using older drivers, reinstall AmigoPOS to use the newer drivers, reboot and try again.

**Issue: Unable to start AmigoPOS after initial installation**

- Most likely, another program was using files that required updating by the installer. Shut down all other programs, including antivirus utilities, and run the installer again. If that does not solve the issue, ensure that you have the latest service packs installed on the pc. AmigoPOS requires Microsoft XML v6, MDAC 2.8 and MS Jet 4.0.

**Issue: Unable to start AmigoPOS or access devices such as barcode scanner or fingerprint reader after installing a manufacturer provided drivers**

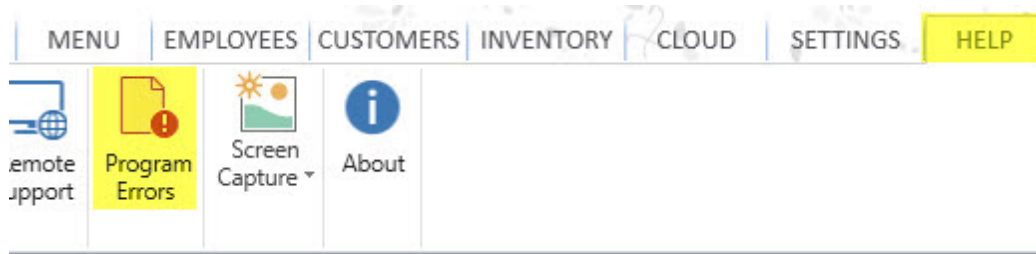
- Some drivers may overwrite new OPOS drivers required by AmigoPOS with outdated drivers. This will cause errors when attempting to start AmigoPOS or use any devices, whether through OPOS or traditional interface. Reinstall AmigoPOS, reboot and try again.

**Issue: Unable to create a database backup in MS Windows Vista or MS Windows Server 2008**

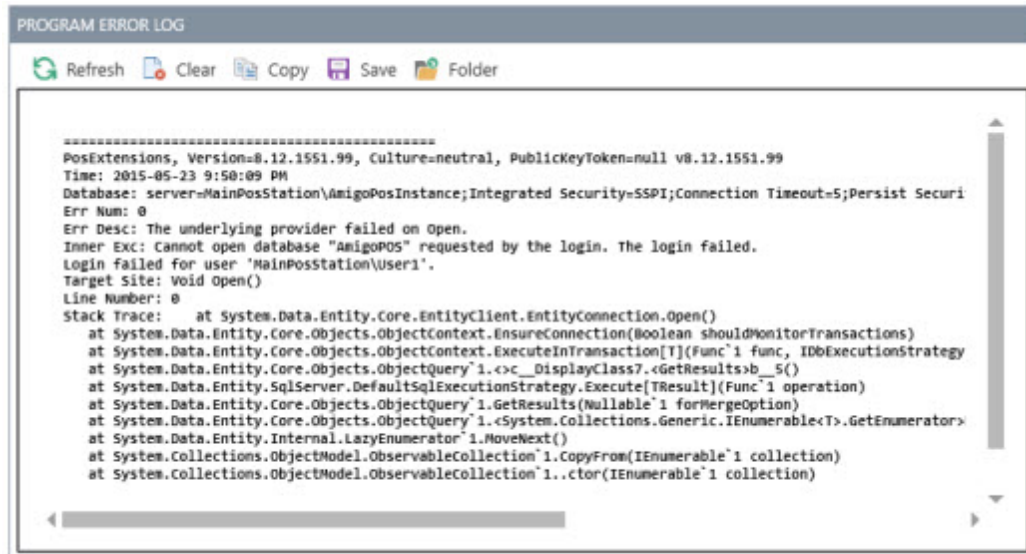
- Permission errors may prevent AmigoPOS from saving a database backup file. Ensure that the path to a folder that is writeable by AmigoPOS is specified, click **Save Settings** and click the **Backup Database** button.

## 36.2 Error Log

AmigoPOS includes a comprehensive error reporting system that will provide support personnel with the information needed to troubleshoot program errors. Errors may occur during program installation, setup or usage. The error log records the date/time of the error, the program location and error description.



Back Office>Help>Program Errors

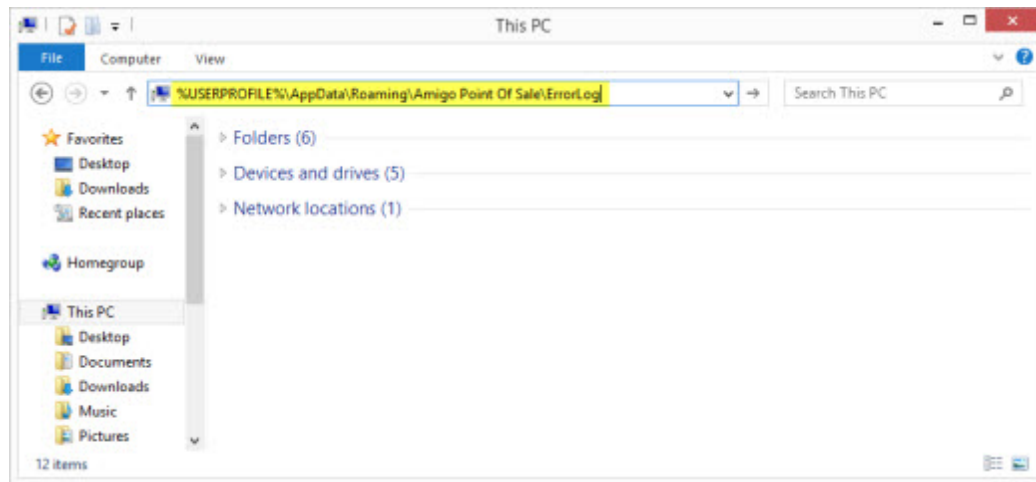


Program Error Log

To resolve your issue as fast as possible, complete the following steps to submit your error log to AmigoPOS support:

1. Open back office
2. Click **Help > Program Errors** to open the error log screen
3. If entries exist, click **Save to desktop**. The log is saved to the desktop as **amigoposerrors.log**.
4. Open a support ticket at <http://www.amigopos.com> and use the **Upload** button to attach the log file to the order
5. You may also wish to attach a compress backup of the database
6. Provide as much information as possible, including the operating system, version of AmigoPOS, a description of the error and submit the order

Note that the program error log can be accessed directly in Windows Explorer by pasting **%USERPROFILE%\AppData\Roaming\Amigo Point Of Sale\ErrorLog** into the address bar:



### 36.3 Screenshots

On occasion it may be helpful to attach a screenshot to a support ticket. Select **Back Office>Help** and expand the Screen Capture button to select the screenshot type as follows:

- **Capture Screen** will create and save a snapshot of the current view
- **Capture Window** will create and save a snapshot of back office only

The screenshot is saved as a **.jpg** file to the current user's desktop. The file does not have to be zipped before attaching to a support ticket.

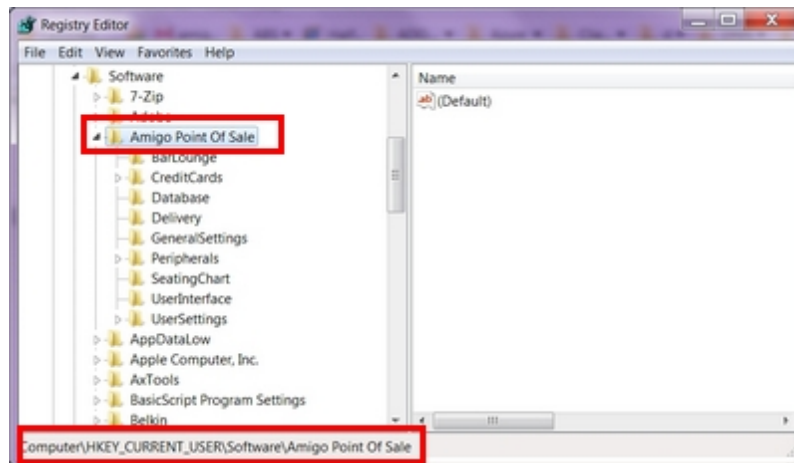


**Back Office>Help>Screen Capture**

### 36.4 Registry Backup

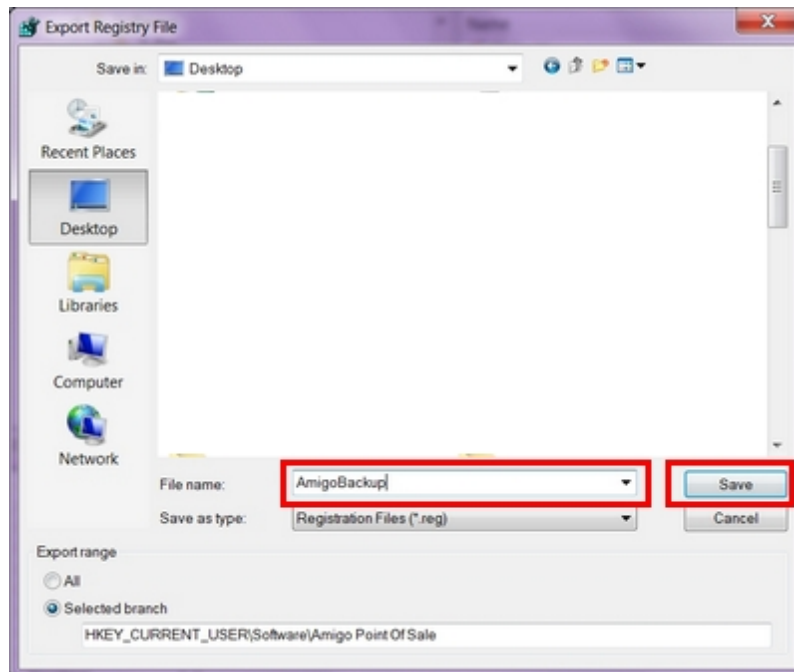
When reinstalling AmigoPOS on a new computer, local settings that contain peripheral and other local configuration settings can be backed up as follows:

1. Click **Start > Run**. Type **Regedit** in the box and click OK
2. In the Registry Editor, navigate to **HKEY\_CURRENT\_USER\Software\AmigoPOS**.



Registry Editor

3. Right-click on the **AmigoPOS** node in the left pane and click **Export**. Enter a file name and click **Save**.



Registry Editor Export

4. Move the file to the new computer. Double-click on the backup file and click **Yes** at the prompt to import the settings from the registry backup file.
























Part 37

# Appendix

## 37 Appendix

### 37.1 Shared Settings

The following settings are available in **Back Office/Settings/ All Program Settings** and are shared by all order entry and back office computers. A database update or program restart is required after changing a setting. Note that some legacy (Version 5) settings have been deprecated and are included for reference only.

- [\(1\) Bar Menu](#) 
- [\(2\) Bar Menu Settings](#) 
- [\(3\) Bar Tabs](#) 
- [\(4\) Barcode scanner](#) 
- [\(5\) Card Specifications](#) 
- [\(6\) Credit Cards](#) 
- [\(7\) Currency Presets](#) 
- [\(8\) Custom Text](#) 
- [\(9\) Database](#) 
- [\(10\) Deliveries](#) 
- [\(11\) Discounts](#) 
- [\(12\) DrawerReset](#) 
- [\(13\) End Of Day](#) 
- [\(14\) General Settings](#) 
- [\(15\) Gift Cards](#) 
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#### Bar Menu

##### Numeric Settings

- **Default Bar Menu Category** If set to 0, the category selection screen appears when the bar menu is accessed. Otherwise, a specified bar menu category's items will be visible.

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#### Bar Menu Settings

**Numeric Settings**

- **Bar Menu Tax Rate** Default tax rate for all bar menu items

[^Top](#) **Yes/No Settings**

- **Bar Menu Allow Tax Included** Set to No to charge tax on bar menu items for order types that are configured to be tax inclusive
- **Bar Menu Enabled** Enable the bar menu on the order entry screen
- **Order Bar Menu Items Alphabetically** Set to No to use button position value to order bar menu items on the order entry screen
- **Remote Print Bar Upcharge Asterisk** Set to Yes to print an asterisk before and after the upcharge description when sent to prep printer

[^Top](#) **Bar Tabs****Text Settings**

- **Bar Tab Number Card End Sentinel** Bar Tab Number card end sentinel character
- **Bar Tab Number Card Start Sentinel** Bar Tab Number card start sentinel character

[^Top](#) **Numeric Settings**

- **Bar Tab Number Card Track** When using bar tab numbers in conjunction with magnetic cards
- **Default Bar Tab Amount** The default amount that new bar tabs are preauthorized for

[^Top](#) **Yes/No Settings**

- **Bar Tabs Order Alphabetically** Set to Yes to order bar tabs alphabetically by customer name on the order selection screen. Set to No to order bar tabs by time entered
- **Enable Bar Tab Number** Set to Yes to enable bar tab number entry after new bar tab preauthorization
- **Enforce Bar Tab Preauth Limit** Do not allow the bar tab order to exceed the preauthorization amount
- **Force Bar Tab Number** Set to Yes to force bar tab number entry (EnableBarTabNumber must also be set to Yes)
- **Mandatory Bar Tab Seat Selection** Force user to select a seat when starting a new bar tab
- **Show Bar Tab Button** Set to No to hide the NEW TAB and TABS buttons on the order entry screen
- **Show Bar Tab Pre Auth Button** Set to No to hide the bar tab Pre Authorize button on the order entry screen

[^Top](#) **Barcode scanner****Text Settings**

- **Wedge Scanner Terminator** The special character transmitted by a keyboard wedge scanner at the end of the scan

[^Top](#) **Yes/No Settings**

- **Expand UPC E Barcode To UPC A** Set to Yes to automatically expand UPC-E barcodes to UPC-A before looking up a scanned barcode
- **Trim Barcode Leading Digit** Set to Yes to automatically trim the leading digit from the scanned barcode before looking up a scanned barcode
- **Trim Barcode Trailing Characters** Set to Yes to automatically trim the last 2 trailing characters from the scanned barcode before looking up a scanned barcode

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## Card Specifications

## Text Settings

- **Employee Card End Sentinel** Employee card end sentinel character
- **Employee Card Start Sentinel** Employee card start sentinel character
- **Gift Card End Sentinel** Gift card end sentinel character
- **Gift Card Start Sentinel** Gift card start sentinel character
- **Loyalty Card End Sentinel** Loyalty card end sentinel character
- **Loyalty Cards Start Sentinel** Loyalty card start sentinel character

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## Numeric Settings

- **Employee Card Track** Track number to read for obtaining employee card id
- **Gift Card Track** Track number to read for obtaining gift card id
- **Loyalty Card Track** Track number to read for obtaining loyalty card id

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## Credit Cards

## Text Settings

- **Credit Card Button 1** Text to appear on credit card button 1 - leave blank to hide button (for external card computers only)
- **Credit Card Button 2** Text to appear on credit card button 2 - leave blank to hide button (for external card computers only)
- **Credit Card Button 3** Text to appear on credit card button 3 - leave blank to hide button (for external card computers only)
- **Credit Card Button 4** Text to appear on credit card button 4 - leave blank to hide button (for external card computers only)

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## Numeric Settings

- **Signature Line Minimum** Fast food restaurants: minimum amount before a signature line is printed on a cc signature slip. This applies to integrated payment processing only and should only be used when approved by the payment processor. Many processors require a customer signature.

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## Yes/No Settings

- **Signature Slip Print Auth Number** Set to Yes to print the authorization number on credit card signature slips (applies only to integrated credit card processing)
- **Signature Slip Print Card Issuer** Set to Yes to print the credit card issuer on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Card Member** Set to Yes to print the cardholder name on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Card Number** Set to Yes to print the last 4 digits of the credit card number on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Date** Set to Yes to print the transaction date on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Expiration Date** Set to Yes to print the masked expiration date on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Reference Number** Set to Yes to print the reference number on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Result** Set to Yes to print the transaction result on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Sequence Number** Set to Yes to print the sequence number on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Swipe Type** Set to Yes to print the swipe method on credit card signature slips (applies only to integrated credit card processingusers)
- **Signature Slip Print Table Name** Set to Yes to print the dine-in table name on credit card signature slips (applies only to integrated credit card processingusers)



○ <b>Signature Slip Print order Number</b>	Set to Yes to print the order id on credit card signature slips (applies only to integrated credit card processing users)
○ <b>Signature Slip Print Time</b>	Set to Yes to print the transaction time on credit card signature slips (applies only to integrated credit card processing users)
○ <b>Signature Slip Print Transaction</b>	Set to Yes to print the transaction id on credit card signature slips (applies only to integrated credit card processing users)
○ <b>Signature Slip Print Transaction Type</b>	Set to Yes to print the transaction type on credit card signature slips (applies only to integrated credit card processing users)
○ <b>Signature Slip Print Trout D</b>	Set to Yes to print the TroutD on credit card signature slips (applies only to integrated credit card processing users)
○ <b>Signature Slip Print User Name</b>	Set to Yes to print the user name on credit card signature slips (applies only to integrated credit card processing users)

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### Currency Presets

#### Numeric Settings

○ <b>Currency Preset 1</b>	Value of settle screen currency preset button #1
○ <b>Currency Preset 2</b>	Value of settle screen currency preset button #2
○ <b>Currency Preset 3</b>	Value of settle screen currency preset button #3
○ <b>Currency Preset 4</b>	Value of settle screen currency preset button #4
○ <b>Currency Preset 5</b>	Value of settle screen currency preset button #5
○ <b>Currency Preset 6</b>	Value of settle screen currency preset button #6

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#### Yes/No Settings

○ <b>Currency Preset 1 Enabled</b>	Show currency preset button #1 on the cash transaction screen
○ <b>Currency Preset 2 Enabled</b>	Show currency preset button #2 on the cash transaction screen
○ <b>Currency Preset 3 Enabled</b>	Show currency preset button #3 on the cash transaction screen
○ <b>Currency Preset 4 Enabled</b>	Show currency preset button #4 on the cash transaction screen
○ <b>Currency Preset 5 Enabled</b>	Show currency preset button #5 on the cash transaction screen
○ <b>Currency Preset 6 Enabled</b>	Show currency preset button #6 on the cash transaction screen

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### Custom Text

#### Text Settings

○ <b>Default Customer Location Name</b>	Name to assign to the first customer location
○ <b>NCF Header Consumer</b>	Text to print above the NCF Final Value - leave blank to omit
○ <b>NCF Header Final Value</b>	Text to print above the NCF Final Value - leave blank to omit
○ <b>NCF Prefix Consumer</b>	Text to print before NCF Final Value - leave blank to omit
○ <b>NCF Prefix Final Value</b>	Text to print before NCF Final Value - leave blank to omit
○ <b>Text Text Receipt Number</b>	Text to print on customer receipt next to order number at the bottom of the order (visible only when a barcode is not printed)
○ <b>Ticket Delivery Charge Text</b>	Text to print on order for delivery charge
○ <b>Ticket Print Guest Prefix</b>	When order details are grouped by guest, print this before the guest#
○ <b>Ticket Print Guest Suffix</b>	When order details are grouped by guest, print this after the guest#
○ <b>Ticket Text Amount Tendered</b>	Text to print on order for amount tendered
○ <b>Ticket Text Bottom Line 1</b>	Text to print on order if bottom line 1 is enabled
○ <b>Ticket Text Bottom Line 2</b>	Text to print on order if bottom line 2 is enabled
○ <b>Ticket Text Bottom Line 3</b>	Text to print on order if bottom line 3 is enabled
○ <b>Ticket Text Bottom Line 4</b>	Text to print on order if bottom line 4 is enabled
○ <b>Ticket Text Bottom Line 5</b>	Text to print on order if bottom line 5 is enabled
○ <b>Ticket Text Change Due</b>	Text to print on order for change due
○ <b>Ticket Text Customer Copy</b>	Text to print on customer receipt when indicating that the receipt is a customer copy
○ <b>Ticket Text Customer Information</b>	Text to print on customer receipt above the customer name and address

○ <b>Ticket Text Guest</b>	Text to print on customer receipt when displaying the number of guests on the customer receipt (1 Guest)
○ <b>Ticket Text Guests</b>	Text to print on customer receipt when displaying the table number on the customer receipt (more than 1 Guest)
○ <b>Ticket Text Item Count</b>	Text to print on order for total number of items
○ <b>Ticket Text Mandatory Gratuity</b>	Text to print on customer receipt when a mandatory gratuity is added to an order
○ <b>Ticket Text Order Number</b>	Text to print on customer receipt above the large order number at the bottom of the order
○ <b>Ticket Text Pay This Amount</b>	Text to print on order for amount to pay
○ <b>Ticket Text Seat</b>	Text to print on order for seat
○ <b>Ticket Text Server</b>	Text to print on order for server
○ <b>Ticket Text Split</b>	Text to print above total on split orders
○ <b>Ticket Text Subtotal</b>	Text to print on order for subtotal
○ <b>Ticket Text Table</b>	Text to print on customer receipt when displaying the table number on the customer receipt
○ <b>Ticket Text Top Line 1</b>	Text to print on order if top line 1 is enabled
○ <b>Ticket Text Top Line 2</b>	Text to print on order if top line 2 is enabled
○ <b>Ticket Text Top Line 3</b>	Text to print on order if top line 3 is enabled
○ <b>Ticket Text Top Line 4</b>	Text to print on order if top line 4 is enabled
○ <b>Ticket Text Top Line 5</b>	Text to print on order if top line 5 is enabled
○ <b>Ticket Text Total Due</b>	Text to print on order for total due (total due appears instead of amount to pay if the order is already settled)
○ <b>Ticket Text Transactions</b>	Text to print on order for transactions header

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#### Numeric Settings

○ <b>NCF Type</b>	For NCF users: set to 0 for final value (on demand) or 1 for consumer (continuous)
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#### Yes/No Settings

○ <b>NCF Enabled</b>	For NCF users: enable NCF (fiscal tax number) and display the NCF configuration button on the tax rates screen
○ <b>NCF Print Top</b>	For NCF users: set to Yes to print NCF below the receipt header - set to No to print NCF above the receipt footer

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#### Database

##### Numeric Settings

○ <b>Database Update Interval</b>	Interval in hours to synchronize the local database with the server database at user login
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#### Deliveries

##### Numeric Settings

○ <b>Auto Customer Lookup Minimum Digits</b>	Enter the minimum number of digits required before the auto-lookup is performed as the phone number is entered
○ <b>Customer List Length Limit</b>	Maximum number of items to show on customers lookup list on order entry screen (use small number for slower systems)
○ <b>Delivery Charge Tax Rate</b>	When adding a new delivery zone on the customer information screen, the default delivery charge tax rate id (applies only when the delivery charge is taxable). This value can be changed on the delivery zones screen in back office.
○ <b>Delivery Order Type</b>	Default order type for delivery orders
○ <b>Phone Number Format Length</b>	When formatting a phone number, assume this number of digits will be entered
○ <b>Phone Number Format Length Group 1</b>	Number of digits in the first phone number group
○ <b>Phone Number Format Length Group 2</b>	Number of digits in the second phone number group

- **Phone Number Format Length Group 3** Number of digits in the third phone number group

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#### Yes/No Settings

- **Allow Driver Deposits** Set to Yes to accept driver deposits on the manager screen
- **Default Delivery Zone Tax Status** This value sets the initial tax status when entering a new delivery zone on the customer data screen
- **Disable Auto Customer Phone Lookup** Set to Yes to disable the customer lookup list from refreshing as the phone number is entered
- **Driver Check In Edit Disable** When checking in delivery orders, the delivery order total and payment type cannot be edited
- **Driver Check In Only Disable** When checking in delivery orders, the orders must be settled (check-in is not allowed)
- **Late Delivery Alert Beep** System beep on late delivery alerts
- **Late Delivery Alert Enabled** Show alerts for late delivery orders
- **Phone Number Format Numbers Only** Set to Yes to disable the insertion of dashes into phone number
- **Phone Number Verify Length** When entering a customer phone number, force the user to enter a fixed number of digits
- **Reprint Driver orders Default Value** The default value of the reprint orders buttons on the driver routing screen
- **Show Driver Statistics** Show driver statistics at the top of the driver routing screen

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#### Discounts

##### Text Settings

- **Manual Discount Text** Name to use when user enters a manual discount amount

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#### Yes/No Settings

- **Discount Order Minimum Based On Subtotal Only** Set to No if the Subtotal + Tax should be used when calculating the minimum order amount before a discount is applied (has no effect for VAT tax users)

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#### DrawerReset

##### Yes/No Settings

- **Allow Partial Drawer Count** Set to Yes to allow the drawer to be reset even if a mandatory drawer count is not complete
- **Print Drawer Reset Report** Set to Yes to automatically print the drawer report when resetting the cash drawer. This report is archived and can be printed later in Back Office.
- **Show Drawer Count** Set to Yes to force the manager to preform a manual drawer count when resetting the drawer

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#### End Of Day

##### Numeric Settings

- **Default Weather Image** Default weather image that appears on end of day screen

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#### Yes/No Settings

- **Disable End Of Day Open Preauth** Set to Yes to prevent the user from completing the End Of Day procedure if preauth transactions that have not been captured exist
- **Disable End Of Day Open orders** Set to Yes to disable the End-Of-Day button when open order exist

○ <b>End Of Day Cash Paid Out Summary</b>	Set to Yes to show cash paid out summary on the end of day report
○ <b>End Of Day Deliveries Summary</b>	Set to Yes to show deliveries by driver summary on the end of day report
○ <b>End Of Day Order Type Summary</b>	Set to Yes to show sales by order type summary on the end of day report
○ <b>End Of Day Refunds Summary</b>	Set to Yes to show refunds summary on the end of day report
○ <b>End Of Day Removed Items Summary</b>	Set to Yes to show deleted order items summary on the end of day report
○ <b>End Of Day Server Sales Summary</b>	Set to Yes to show sales by server summary on the end of day report
○ <b>End Of Day Subtotal By Item Type Summary</b>	Set to Yes to show subtotal (tax not included) by item type summary on the end of day report
○ <b>End Of Day Tax Collected</b>	Set to Yes to show tax summary on the end of day report
○ <b>End Of Day pos station Sales Summary</b>	Set to Yes to show sales by pos station summary on the end of day report
○ <b>End Of Day Transactions Summary</b>	Set to Yes to show revenue by transaction type summary on the end of day report
○ <b>End Of Day Void Open orders</b>	Set to Yes to automatically void all open orders and associated transactions when performing end of day
○ <b>Exclude Bartenders From Bar Sales Report</b>	Set to Yes to exclude bartenders from the end of day bar sales report. Generally used for tip-out.
○ <b>Include Tax In Bar Sales Report</b>	Set to Yes to include tax in bar sales report totals (applies to non-VAT users only)
○ <b>Show End Of Day Confirmation Screen</b>	Set to Yes to show the confirmation screen after the user presses the Confirm End Of Day button
○ <b>Show End Of Day Event Weather</b>	Prompt the manager to enter business day characteristics when performing end-of-day
○ <b>Suppress Print End Of Day Report</b>	Set to No to automatically print the drawer report when the End-Of-Day procedure is completed. Override this value by pressing the printer icon button on the End-Of-Day screen.

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## General Settings

### Text Settings

○ <b>Last Location Setting Update</b>	Version check for last location settings update (do not alter this value)
○ <b>Screen Font Name</b>	System font to use on front end user interface

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### Numeric Settings

○ <b>Bartender Permission</b>	Job Type Id corresponding to bartender job type
○ <b>Database Version</b>	Current database version. Do not modify this value.
○ <b>Default Misc Item Tax Rate</b>	Enter the default tax rate to use for MISC items. This value can be changed on the MISC item entry screen.
○ <b>Driver Job Type</b>	Job Type Id corresponding to driver job type
○ <b>Driver Permission</b>	Job Type Id corresponding to driver job type
○ <b>Split Void Reason</b>	Void reason id to use when voiding an order if splitting by guest

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### Yes/No Settings

○ <b>Compress Backup Files</b>	Set to Yes to automatically compress the backup file and then delete it
○ <b>Prevent Overlapping Schedule Entries</b>	Set to Yes to disable the ability to add conflicting schedule entries for individual employees (also applies to cloning schedule)
○ <b>Show Loyalty Card Prompt</b>	Set to Yes to prompt the user to swipe the customer's loyalty card before settling an order
○ <b>Show Message Alert</b>	Set to Yes to show animated icon when user has unread messages
○ <b>Temp Files All Users</b>	Set to Yes to use the All Users documents folder for temporary files; set to No to use the Current User documents folder
○ <b>order List Scrolling</b>	Set to No to scroll one order per button press or True to scroll to the top or bottom of the list
○ <b>Use Default Printer On Printer Error</b>	Set to Yes to use the default windows printer when the specified printer is not available (the default printer should be a locally attached printer)

- **Use Gift Card Web Service** Set to Yes to use a remote gift card web service to process gift card transactions
- **Use Item Modifiers** Show Item Options button on order entry screen
- **Use Order Optionals** Show Order Options button on order entry screen
- **Vat Tax** Items include tax in price

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## Gift Cards

### Text Settings

- **Gift Card Management Url** URL of gift card management site
- **Gift Card Ws Account Name** Account name used to login to the gift card web service
- **Gift Card Ws Account Token** Encrypted account token used to access the gift card web service. This value is encrypted and cannot be modified directly.
- **Gift Card Ws Host** Address of gift card web service
- **Gift Card Ws Password** Encrypted password used to login to the gift card web service. This value is encrypted and cannot be modified directly.

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### Numeric Settings

- **Gift Card Valid Days** Enter the default value in days for which new gift card is valid. The value can be changed when activating a new gift card

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## Images

### Numeric Settings

- **Thumbnail Image Height** Height (in pixels) of thumbnail images in the image management window
- **Thumbnail Image Width** Width (in pixels) of thumbnail images in the image management window

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## Ingredient Abbreviations

### Text Settings

- **Bottom Half** Abbreviation for Bottom Half Of Pizza
- **Bottom Left Quarter** Abbreviation for Bottom Left Quarter Of Pizza
- **Bottom Right Quarter** Abbreviation for Bottom Right Quarter Of Pizza
- **Top Half** Abbreviation for Top Half Of Pizza
- **Top Left Quarter** Abbreviation for Top Left Quarter Of Pizza
- **Top Right Quarter** Abbreviation for Top Right Quarter Of Pizza

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## Label Printer Settings

### Text Settings

- **Label Print Bottom Line 1** First line to display at bottom of label
- **Label Print Bottom Line 2** Second line to display at bottom of label
- **Label Printer Font** System font to use when printing labels using Windows printer driver
- **Label Print Top Line 1** First line to display at top of label
- **Label Print Top Line 2** Second line to display at top of label

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### Numeric Settings

- **Label Printer Font Size** Font size to use for labels
- **Label Printer Line Feeds Bottom** Number of blank lines at bottom of label
- **Label Printer Line Feeds Top** Number of blank lines at top of label

[^Top](#) **Yes/No Settings**

o <b>Label Print Customer Info Bottom</b>	Print customer information at bottom of label
o <b>Label Print Customer Info Top</b>	Print customer information at top of label
o <b>Label Print Date Time Bottom</b>	Print date and time at bottom of label
o <b>Label Print Date Time Top</b>	Print date and time at top of label
o <b>Label Printer Name Top</b>	Print the name of the printer at top of label. Useful when testing multiple label printers
o <b>Label Print Item Count</b>	Print item count at bottom of label
o <b>Label Print Modifiers</b>	Print menu item optionals on labels
o <b>Label Print Order Total Due</b>	Print order total at bottom of label
o <b>Label Print Order Type Bottom</b>	Print order type and order number at bottom of label
o <b>Label Print Order Type Top</b>	Print order type and order number at top of label

[^Top](#) **Label Printers****Loyalty Cards****Numeric Settings**

o <b>Loyalty Card Coupon Amount</b>	When using amount based loyalty card rewards, enter the amount of the coupon issued when the purchase amount level is reached
o <b>Loyalty Card Coupon Expiration</b>	When using amount based loyalty card rewards, enter the value in days that the coupon is valid from the date of issue
o <b>Loyalty Card Method</b>	The value indicating the type of loyalty card promotion used. 0=disabled, 1=amount based 2=points based
o <b>Loyalty Card Purchase Amount</b>	When using amount based loyalty card rewards, enter the amount that must be purchased before a coupon is issued

[^Top](#) **Order Entry****Text Settings**

o <b>Take Out Container Charge</b>	order Line Item Description for Takeout Container Charge
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[^Top](#) **Yes/No Settings**

o <b>Keep Original User After order Recall</b>	Set to No to replace the user id on a recalled order with the new user (when a different user opens the order)
o <b>Show Category Select Button</b>	Set to Yes to show the category selection button (All-Food-Bar) on the order entry screen
o <b>Use Table In Use Indicator</b>	Set to Yes to show seating chart table buttons with a red background when the table is in use
o <b>Use Table Reserved Indicator</b>	Set to Yes to show seating chart table buttons with a yellow background when the table is in reserved

[^Top](#) **Order Entry Buttons****Yes/No Settings**

o <b>Order Entry Screen Submit Button</b>	Set to No to hide the submit button on the order entry screen
o <b>Order Entry Screen Suspend Button</b>	Set to No to hide the suspend button on the order entry screen

o <b>Remain On Previous Category Selection</b>	Set to Yes to remain on the previously selected regular menu category instead of using the predefined startup category when starting a new order
o <b>Retail Module Enabled</b>	Set to No to hide the retail button on the order entry screen
o <b>Use Exact Change For Cash Button</b>	When pressing the CASH button on the order entry screen, assume exact change is tendered and settle order

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## Pizza Menu

### Yes/No Settings

o <b>Pizza Menu Allow Tax Included</b>	Set to No to charge tax on pizza menu items for order types that are configured to be tax inclusive
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## Pizza Menu Settings

### Numeric Settings

o <b>Pizza Half Style Multiplier</b>	When a pizza order consists of 2 different half styles on a single pizza, enter the value to multiply the regular price to determine the half price
o <b>Pizza Ingredient Half</b>	Amount to multiply price for half pizza ingredient order
o <b>Pizza Ingredient Qtr</b>	Amount to multiply price for quarter pizza ingredient order
o <b>Pizza Menu Suggested Price Markup</b>	Amount by which to multiply the recipe cost to arrive at the suggested selling price for pizza menu items
o <b>Pizza Menu Tax Rate</b>	Default tax rate for all pizza menu items

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### Yes/No Settings

o <b>Pizza Half Charge Higher Price</b>	Set to Yes to charge the higher of the 2 style prices when entering a pizza with 2 styles. If set to No, each price is multiplied by one-half
o <b>Pizza Menu Enabled</b>	Enable the pizza menu on the order entry screen
o <b>Pizza Styles Allow Half</b>	Allow half style selection when selecting a pizza style

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## Receipt Printer

### Numeric Settings

o <b>Print Item Tax Type</b>	Print a 2 character tax type next to each order item (0=retail only, 1=all order types, 2=don't print)
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## Receipt Settings

### Numeric Settings

o <b>Print Tax Lines</b>	Print tax lines on customer receipt
o <b>Print order Line Above Bottom Text</b>	Print a line above the bottom 5 order text lines. Set to 0 for no line 1 for single line 2 for double line
o <b>Print order Line Above Total</b>	Print a line above the order total. Set to 0 for no line 1 for single line 2 for double line
o <b>Print order Line Below Bottom Text</b>	Print a line under the bottom 5 order text lines. Set to 0 for no line 1 for single line 2 for double line
o <b>Print order Line Below Header</b>	Print a line under the header. Set to 0 for no line 1 for single line 2 for double line
o <b>Print order Line Below Logo</b>	Print a line under the order logo or at top of order if no logo is used. Set to 0 for no line 1 for single line 2 for double line
o <b>Print order Line Below Top Text</b>	Print a line under the top 5 order text lines. Set to 0 for no line 1 for single line 2 for double line

- **Print order Line Below Total** Print a line under the order total. Set to 0 for no line 1 for single line 2 for double line

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### Yes/No Settings

- **Auto Settle Fractional Balance** Set to Yes to automatically settle orders with a balance less than .01.
- **Print Large Number** Print 3 digit number on bottom of order
- **Print Space Between order Items** Print a blank line between order items
- **Print order After Void** Set to Yes to automatically print order after voiding it
- **Print order Bitmap Logo** Print the stored bitmap image on the customer receipt
- **Print order Bottom Barcode** Print scannable Code 39 barcode at the bottom of the customer receipt
- **Print order Bottom Line 1** Print additional text at the 1st line on the bottom of the customer receipt
- **Print order Bottom Line 2** Print additional text at the 2nd line on the bottom of the customer receipt
- **Print order Bottom Line 3** Print additional text at the 3rd line on the bottom of the customer receipt
- **Print order Bottom Line 4** Print additional text at the 4th line on the bottom of the customer receipt
- **Print order Bottom Line 5** Print additional text at the 5th line on the bottom of the customer receipt
- **Print order Bottom Time** Print time on bottom of receipt
- **Print order Header** Print server name, order type, table at the top of the customer receipt
- **Print order Space Between Items** Print a blank line between each order item (excluding modifiers)
- **Print order Subtotal** Print the subtotal on the customer receipt
- **Print order Top Line 1** Print additional text at the 1st line on the top of the customer receipt
- **Print order Top Line 2** Print additional text at the 2nd line on the top of the customer receipt
- **Print order Top Line 3** Print additional text at the 3rd line on the top of the customer receipt
- **Print order Top Line 4** Print additional text at the 4th line on the top of the customer receipt
- **Print order Top Line 5** Print additional text at the 5th line on the top of the customer receipt
- **Print order Transactions** Print all transactions at the bottom of the order
- **Print order Zero Cost Optionals** Print zero-cost Optionals under menu items on the customer receipt

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### Regular Menu

#### Numeric Settings

- **Mandatory Beverage Category** Menu category used for mandatory beverage selection

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### Yes/No Settings

- **Auto Display Mandatory Optional Only** Show modifiers only when required modifier groups are assigned to the menu item
- **Order Menu Items Alphabetically** Order regular menu and retail items alphabetically on the order entry screen after pressing a category button
- **Regular Menu Allow Tax Included** Set to No to charge tax on regular menu items for order types that are configured to be tax inclusive
- **Send Misc Items To Prep 1** Set to Yes to send MISC items to prep printer or remote display 1 by default. A different destination can be selected on the MISC item entry screen.

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### Remote Display

#### Text Settings

- **Remote Display Font Name** Font to use for remote display order text

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#### Numeric Settings

- **Remote Display Border Color** Border color of selected screen orders
- **Remote Display Default Sound** System sound to play when a new order is added to the list
- **Remote Display Late Alert Minutes** Minutes before late alert color is used (set to 0 to disable)
- **Remote Display Late Color** Late Alert color for remote display main screen



o <b>Remote Display Late Sound</b>	System sound to play when the oldest order duration is longer than the late alert minutes
o <b>Remote Display Late Text Color</b>	Remote display footer late font color
o <b>Remote Display Lines Double</b>	Number of lines to show on screen order in double view
o <b>Remote Display Lines Normal</b>	Number of lines to show on screen order in normal view
o <b>Remote Display Lines Triple</b>	Number of lines to show on screen order in full screen height view
o <b>Remote Display Menu Item Color</b>	Remote display menu item text color
o <b>Remote Display Normal Alert Color</b>	Normal footer color for remote display main screen
o <b>Remote Display Normal Text Color</b>	Remote display footer normal font color
o <b>Remote Display Optional Color</b>	Remote display optional text color
o <b>Remote Display Order Type Text Color</b>	Remote display order type font color
o <b>Remote Display Screen Color</b>	Background color for remote display main screen
o <b>Remote Display Screen Refresh Disable Interval</b>	Time in seconds to disable screen updates when the Previous, Next or Lock button is pressed
o <b>Remote Display Screen Refresh Interval</b>	Time in seconds to pause between screen updates
o <b>Remote Displays In Use</b>	Enter the highest remote display id. This value is used to speed up order submission, similar to disabling prep printers that are not in use.
o <b>Remote Display Summary Color</b>	Background color of summary view
o <b>Remote Display Summary Text Color</b>	order color of summary view
o <b>Remote Display Text Color</b>	Text color for remote display main screen
o <b>Remote Display Text Size</b>	Remote display font size
o <b>Remote Display order Color</b>	order and list background color for remote display main screen
o <b>Remote Display Totals Position</b>	Position of the item totals list
o <b>Remote Display Warning Alert Minutes</b>	Minutes before warning alert color is used (set to 0 to disable)
o <b>Remote Display Warning Color</b>	Warning alert color for remote display main screen
o <b>Remote Display Warning Late Sound Interval</b>	Number of minutes between playing sound when the oldest order duration is longer than the warning or late alert minutes
o <b>Remote Display Warning Sound</b>	System sound to play when the oldest order duration is longer than the warning alert minutes
o <b>Remote Display Warning Text Color</b>	Remote display footer warning font color

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#### Yes/No Settings

o <b>Remote Display Enabled</b>	Set to Yes to enabled remote display(s)
o <b>Remote Display Show Totals</b>	Set to Yes to enable the item totals list
o <b>Remote Display Show Totals Double Wide</b>	Set to Yes to display the item totals list double with width or height
o <b>Remote Display Text Bold</b>	Set to Yes to use bold font on remote displays

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#### Remote Printer Settings

##### Numeric Settings

o <b>Remote Printer Line Feeds Bottom</b>	Number of blank lines to print at the bottom of prep tickets
o <b>Remote Printer Line Feeds Top</b>	Number of blank lines to print at the top of prep tickets

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##### Yes/No Settings

o <b>Delete prep ticket Alerts</b>	Set to Yes to delete prep ticket alerts so that they are not printed again if the order is recalled and new items are added.
o <b>Remote Print Customer Info</b>	Print customer name, address and phone on prep tickets
o <b>Remote Printer Date Time</b>	Set to Yes to print the date and time on the prep ticket header

○ <b>Remote Printer Header Height</b>	Print prep ticket header text in double-height font
○ <b>Remote Printer Header Width</b>	Print prep ticket header text in double-wide font
○ <b>Remote Printer Menu Item Line Feed</b>	Set to Yes to insert a blank line after each menu item and optional is printed
○ <b>Remote Printer Order Type</b>	Set to Yes to print the order type on the prep ticket header
○ <b>Remote Printer Printer Name</b>	Set to Yes to print the printer name on the prep ticket header
○ <b>Remote Printer Server Name</b>	Set to Yes to print the server name on the prep ticket header
○ <b>Remote Printer Table Name</b>	Set to Yes to print the table name on the prep ticket header
○ <b>Remote Printer order</b>	Set to Yes to print the order id on the prep ticket header
○ <b>Remote Print Guest</b>	Set to Yes to print guest number above menu items for order types that have guest assignment enabled
○ <b>Remote Print Ticket Number</b>	Print large 3-digit number at bottom of prep tickets

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### Remote Printers

#### Yes/No Settings

○ <b>Print Discounts On Remote orders</b>	Set to Yes to print any discounts at the bottom of remote orders
○ <b>Print Prices On Remote orders</b>	Set to Yes to print prices next to each item on remote orders. Enabling this feature shortens the item name.
○ <b>Send Remote Removed Item Alert</b>	Print message to remote printers when an item is removed from an active order

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### Remote Printers Menu Items

#### Yes/No Settings

○ <b>Remote Printer Menu Items Height</b>	Print prep ticket menu items in double-height font
○ <b>Remote Printer Menu Items Red</b>	Print prep ticket menu items in red
○ <b>Remote Printer Menu Items Width</b>	Print prep ticket menu items in double-wide font
○ <b>Remote Printer Show Price</b>	Show item price on remote orders
○ <b>Remote Print Optional Level Asterisk</b>	Set to Yes to print an asterisk before and after the optional level description when sent to prep printer
○ <b>Use Delivery Zones</b>	Prompt the user to select a pre-defined delivery zone when starting a delivery order

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### Remote Printers Modifiers

#### Yes/No Settings

○ <b>Remote Printer Modifiers Height</b>	Print prep ticket modifiers in double-height font
○ <b>Remote Printer Optionals Red</b>	Print prep ticket Optionals in red
○ <b>Remote Printer Optionals Width</b>	Print prep ticket Optionals in double-wide font

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### Reports

#### Numeric Settings

○ <b>Report Logo Image</b>	Image to display at top of full size reports (use 0 for no image)
○ <b>Report Transactions Large Amount</b>	Large amount transactions threshold for Transactions (Large Amount) report

## Retail Module

## Text Settings

○ <b>Bottle Deposit Text</b>	Text to display on reports and print on customer receipt for retail item bottle deposits
○ <b>Default Misc Item Name</b>	Text to use if the use default misc item setting is set to true
○ <b>Retail Shortcuts Heading 1</b>	Text to display at top of retail shortcuts group 1
○ <b>Retail Shortcuts Heading 2</b>	Text to display at top of retail shortcuts group 2
○ <b>Retail Shortcuts Heading 3</b>	Text to display at top of retail shortcuts group 3
○ <b>Weight Scale Unit</b>	Text to print on order for scale unit of measurement

## Numeric Settings

○ <b>Cumulative Rental Limit Amount</b>	Reserved for future use - Maximum value of items that a customer can rent
○ <b>Cumulative Rental Limit Items</b>	Reserved for future use - Maximum number of items that a customer can rent
○ <b>Inventory Suggested Price Markup</b>	Amount by which to multiply the recipe cost to arrive at the suggested price
○ <b>Retail Items Category</b>	Default category id for retail items
○ <b>Retail Items List Length Limit</b>	Maximum number of items to show on retail items lookup list on order entry screen (use small number for slower systems)

## Yes/No Settings

○ <b>Group Retail Items On Single order Line</b>	Set to Yes to automatically add one to the quantity if a scanned retail item already exists on the order. Set to No to show each item on a separate line.
○ <b>Retail Menu Allow Tax Included</b>	Set to No to charge tax on retail menu items for order types that are configured to be tax inclusive
○ <b>Show Retail PLU Button</b>	Set to Yes to enable the retail item PLU button on the order entry screen
○ <b>Show Retail Price Change Button</b>	Set to Yes to enable the retail item price change button on the order entry screen
○ <b>Show Retail Search Button</b>	Set to Yes to enable the retail item search button on the order entry screen
○ <b>Show Retail Shortcuts</b>	Set to Yes to enable the retail shortcuts buttons on the order entry screen
○ <b>Show Retail SKU Button</b>	Set to Yes to enable the retail item SKU button on the order entry screen
○ <b>Use Default Misc Item Name</b>	Set to Yes to automatically use the default misc item name when adding a misc item to an order, eliminating the need to enter a name

## Security

## Numeric Settings

○ <b>Clear User Actions Log Interval</b>	Interval in days to clear old user actions log data. Any older data will be deleted automatically. Set to 0 to never delete data. Frequent clearing of this table will reduce the size of the database.
○ <b>Order Screen Delay</b>	Delay (in seconds) after settling order before returning to the start screen due to inactivity
○ <b>Server Job Type</b>	Job Type Id corresponding to server job type
○ <b>Server Permission</b>	Permission corresponding to server job type
○ <b>Settle Screen Delay</b>	Delay (in seconds) after settling order before returning to the start screen due to inactivity. Enter a value between 5 and 300 seconds
○ <b>Start Screen Delay</b>	Delay (in seconds) after logging in before auto-logout due to inactivity. Enter a value between 5 and 300 seconds

## Yes/No Settings

○ <b>Allow Permission Overrides</b>	Set to Yes to allow a one user to temporarily allow another user to perform unassigned functions (Manager Override)
-------------------------------------	---

- **Allow Self Permission Overrides** Allows users with multiple job types to override their current permissions with permissions from their default job type
- **Allow Settled order Selection** Display closed orders on existing order selection screens
- **Assign Cash Drawers** Assign Cash Drawers To Users (2-drawer pos stations)
- **Display Only Clocked In Servers** Set to Yes to show only servers that are clocked in on the transfer order server list
- **Print Clock In Confirmation** Print Confirmation After Clock In
- **Print Clock Out Confirmation** Print Confirmation After Clock Out
- **Print Driver Delivery Charges** Print Driver's Delivery Charges Collected After Clock Out
- **Require Clock In For Override** Set to Yes if managers must be clocked in before being allowed to perform overrides
- **Single User Mode** Bypass login screen

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### Server Banking

#### Yes/No Settings

- **Allow Server Deposits** Set to Yes to accept server deposits on the manager screen
- **Server Banking** Use server banking
- **Server Banking Deduct Gratuities** When using server banking, deduct non-cash gratuities from server liabilities
- **Server Banking Prompt Start Amount** If server banking is enabled, setting this value to Yes will prompt the user to enter the bank start amount and source of funds when starting a shift

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### Settle Screen

#### Yes/No Settings

- **Show Settled orders** Show settled orders on order selection screen

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### Store Information

#### Text Settings

- **Business Address** Business address to appear on reports
- **Business Address Line 2** Business address line 2 to appear on reports
- **Business City** Business city to appear on reports
- **Business Fax** Business fax number to appear on reports
- **Business Name** Business Name To Appear On Reports
- **Business Postal Code** Business postal code to appear on reports
- **Business Region** Business state/region to appear on reports
- **Business Telephone** Business phone number to appear on reports

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#### Numeric Settings

- **Business Week Start Day** First day of business week
- **Location** Numeric value used to identify this location for enterprise data sharing, loyalty card data sharing and gift card data sharing
- **Merchant** Numeric value used to identify this merchant for enterprise data sharing, loyalty card data sharing and gift card data sharing

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#### Time Settings

- **Business Day Start** Business open time (Enter 00:00 for 24 hours)

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## Suggested Gratuities

## Text Settings

- o **order Text Suggested Gratuities** Text to print on order for suggested gratuities header

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## Numeric Settings

- o **Print Suggested Gratuity Value 1** Whole number percentage value of suggested gratuity #1
- o **Print Suggested Gratuity Value 2** Whole number percentage value of suggested gratuity #2
- o **Print Suggested Gratuity Value 3** Whole number percentage value of suggested gratuity #3
- o **Print Suggested Gratuity Value 4** Whole number percentage value of suggested gratuity #4
- o **Print Suggested Gratuity Value 5** Whole number percentage value of suggested gratuity #5

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## Yes/No Settings

- o **Print Suggested Gratuities** Enable suggested gatuities at the bottom of the customer receipt
- o **Print Suggested Gratuities 1** Set to Yes to print suggested gratuities #1 at the bottom of the customer receipt
- o **Print Suggested Gratuities 2** Set to Yes to print suggested gratuities #2 at the bottom of the customer receipt
- o **Print Suggested Gratuities 3** Set to Yes to print suggested gratuities #3 at the bottom of the customer receipt
- o **Print Suggested Gratuities 4** Set to Yes to print suggested gratuities #4 at the bottom of the customer receipt
- o **Print Suggested Gratuities 5** Set to Yes to print suggested gratuities #5 at the bottom of the customer receipt

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## Time Clock/Schedule

## Numeric Settings

- o **Late Clock In Grace Period** Time difference in minutes (between current time and scheduled time) before an employee is considered late

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## Yes/No Settings

- o **Allow Cash Drawer Change** Allow users to change drawer assignment in the middle of a shift
- o **Prevent Open orders Clock Out** Prevent clock-out if the user has open orders
- o **Prevent Unscheduled Clock In** Set to Yes to disable clock in for users that are no currently scheduled
- o **Print Clock Out Bank Report** Set to Yes to auto-print the server bank summary report when the user clocks out on the time clock screen
- o **Print Delivery Charges Clock Out** Print collected delivery charges on clock out report for drivers
- o **Suppress Time Clock Activity Report** Hide time clock activity on drawer change report

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## User Interface

## Numeric Settings

- o **Bar Menu Item Image Category** Image category for bar menu item images
- o **Button Appearance** Theme to use on most user interface buttons  
0=3D;1=Flat;2=Transparent;3=WinXP4=MS Explorer;5=MS Office
- o **Button Border Color** Color to use on regular and bar menu buttons
- o **Button Color Highlight** Select the alternate color to use on POS buttons
- o **Button Color Normal** Select the color to use on most POS buttons
- o **Caller Popup Exit Delay** Delay in seconds before caller id popup window closes
- o **Delivery Alert Popup Exit Delay** Delay in seconds before caller id popup window closes
- o **Login Screen Logo Image** Image that appears on the left side of the login screen

○ <b>Login Screen Logo Mask Color</b>	Transparency color of login screen image
○ <b>Menu Group Image Category</b>	Image category for regular menu category images
○ <b>Menu Item Image Category</b>	Image category for menu item images
○ <b>Normal Text Size</b>	Enter the font size (pts) to use on most buttons. This value can be adjusted for individual buttons if required.
○ <b>Optional Image Category</b>	Image category for Optional item images
○ <b>Pizza Menu Item Image Category</b>	Image category for pizza menu item images
○ <b>Recipe Image Category</b>	Image category for recipe images (used for internet ordering and remote kitchen display)
○ <b>Room Layout Image Category</b>	Image category for seating chart background images
○ <b>Screen Color Highlight</b>	Select the color to use on screen accents and some borders
○ <b>Screen Color Normal</b>	Select the color to use on most POS screens
○ <b>Screen order Image</b>	Image Id of the screen order watermark
○ <b>Screen order Image Transparency</b>	Transparency percentage of the screen order logo
○ <b>Seating Chart Image Category</b>	Image category for seating chart images
○ <b>Weather Image Category</b>	Image category for weather images that appear on end of day screen

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#### Yes/No Settings

○ <b>Show Tooltips Back Office</b>	If set to Yes, buttons will show tooltips
○ <b>Show Tooltips Front End</b>	If set to Yes, buttons will show tooltips

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