

AmigoPOS 9 USER MANUAL

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Introduction

1 Introduction

1.1 Welcome



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
- Table Service
- Pizzeria
- Food Court
- Bar and Lounge
- Night Club

All aspects of the user interface can be customized 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 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.

1.2 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](#)^[726] and [Datacap NETePay](#)^[96] 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 computer will not work on other computers. 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).

Demo 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 tickets (or remote display). All devices and peripherals can be configured and tested using the evaluation version.

1.3 Features Overview

AmigoPOS includes three main components:

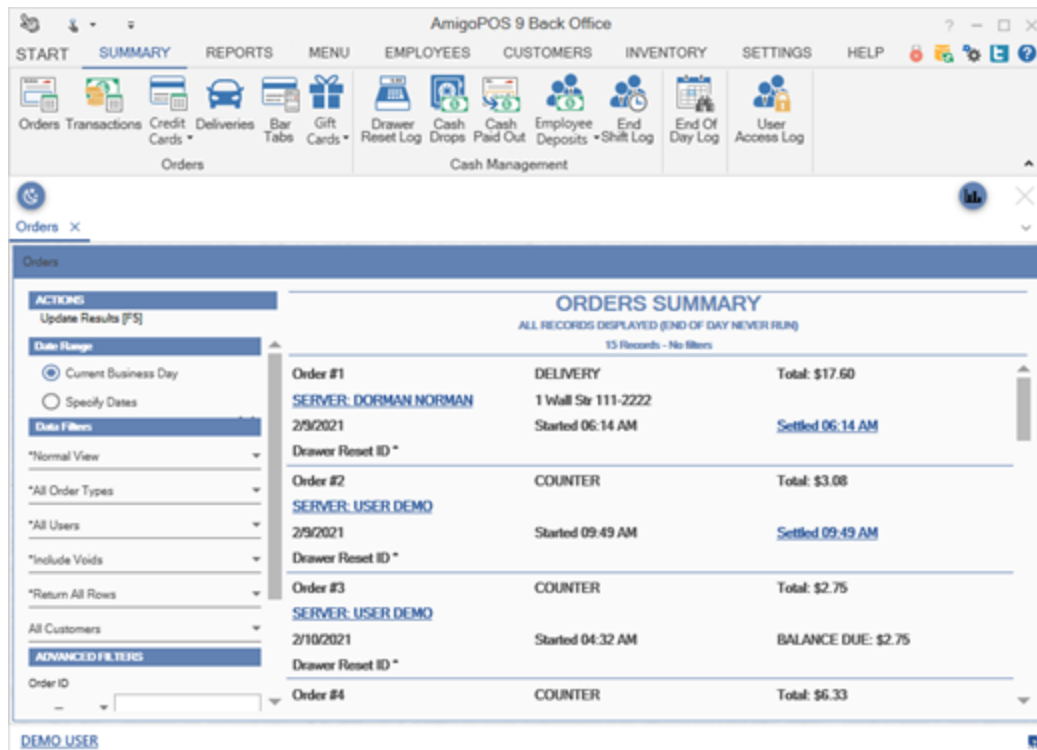
1. data service application (runs at the main pos station only)
2. pos user interface

3. back office



Back office is a keyboard/mouse based application that is used for program setup, configuration and management. When running back office at 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 used at any networked computer without a license. If a license is not present, back office cannot be used to reprint customer receipts, 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 shortcut in the AmigoPOS desktop shortcuts folder or run by clicking the back office icon on the pos application after logging in with appropriate back office permissions.

The pos application 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 screen resolution should be set to 1024x768 pixels or higher for the best user experience.



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

- Assign a customer to the 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 recall settled orders for transaction adjustments, refunds or voids
- Currency presets for one-touch cash-out
- Customizable signature slips for credit card transactions
- Customizable order types (dine-in, delivery, pickup, etc)
- Default menu category for each 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 and thermal printers (prep ticket)
- Full support for almost any thermal receipt printer using Windows drivers (customer receipt)
- 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
- Integrated Intuit QuickBooks accounting interface
- Mandatory gratuity based on order type
- Multi-line caller-id interface
- Primary and alternate address and phone numbers for each customer
- Up to 2 cash drawers per pos station
- One touch change order type on order entry screen
- Optional customer receipt printing
- Print modifiers and/or menu items in red
- Real-time inventory management
- 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 modifiers on customer receipts
- 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 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 modifier
- 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 serial interface 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
- 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 modifiers per modifier 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
- Share inventory items between retail and regular menus
- Smart color pickers for customizing button and font colors
- View on screen full sized reports or print to any letter sized printer

1.4 What's New

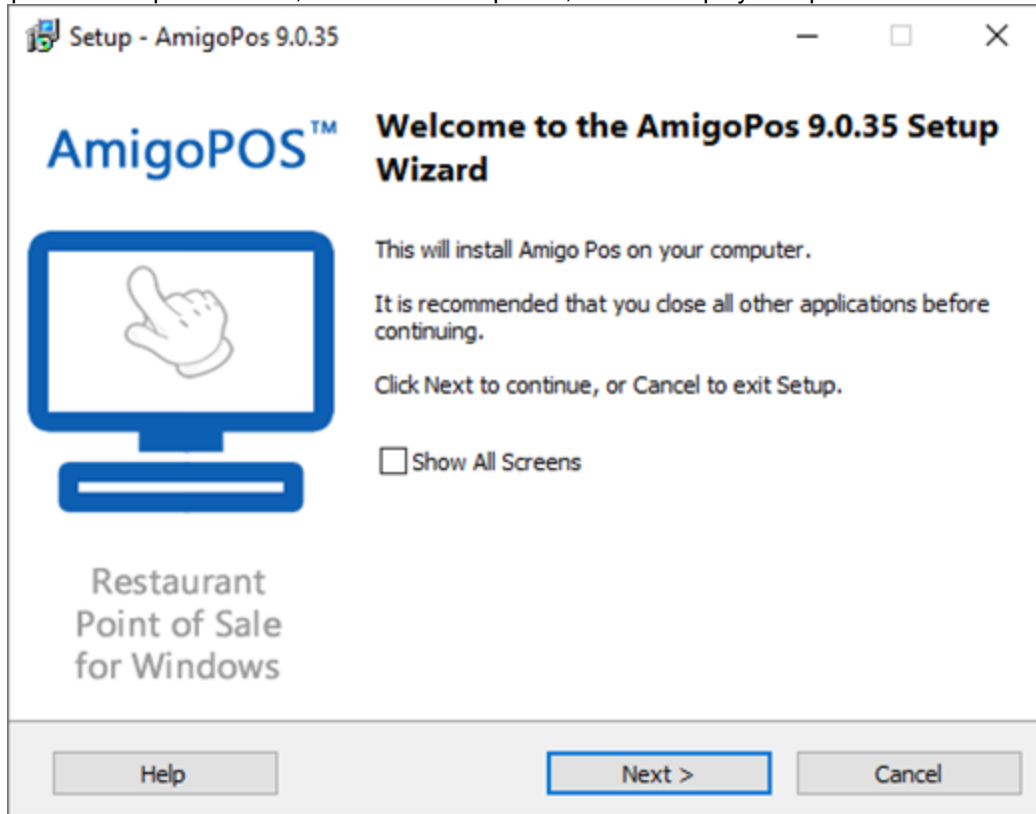
New features, program updates and fixes are continually added to AmigoPOS and made available as downloadable [updates](#)⁴⁴. Recent program updates and fixes are listed at <https://www.amigopos.com/Download/ProgramUpdates?version=9>.

Installation

2 Installation

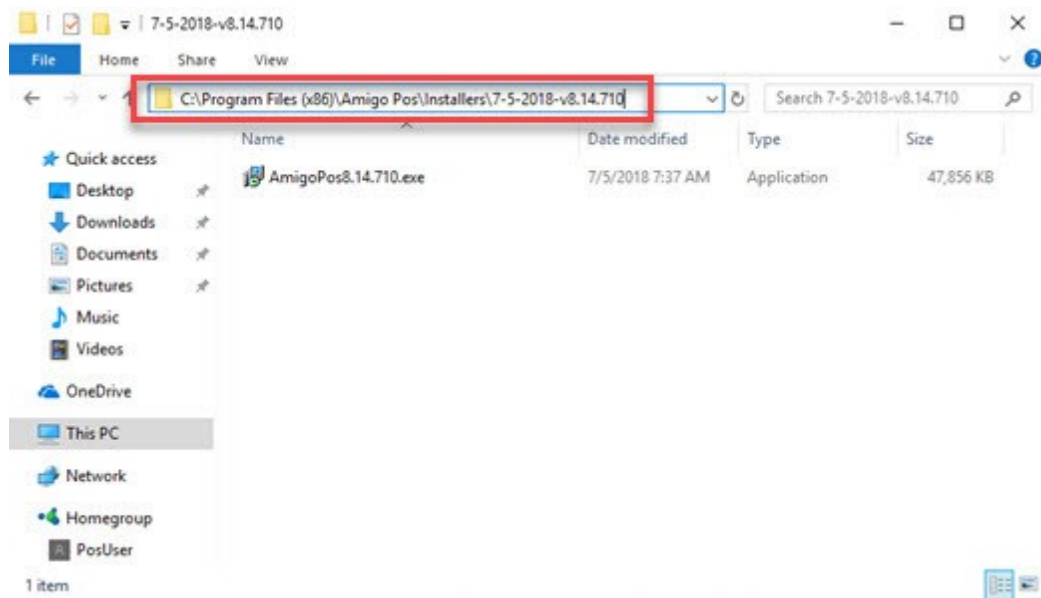
2.1 Getting Started

Before starting installation, make a note of any system settings that may be required including remote print server IP addresses and local COM port numbers for devices such as barcode scanners. Note that **the same version of AmigoPOS must be installed on all pos stations, back office computers, remote display computers and tablets**. In addition, when installing a [program update](#)^[44], install the same update on all pos stations, back office computers, remote display computers and tablets.



- AmigoPOS can be installed on any computer that meets the [minimum system requirements](#)^[52].
- 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. Be sure to back up the database before installing an update. A backup is required to revert to the previous previous.
- 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.

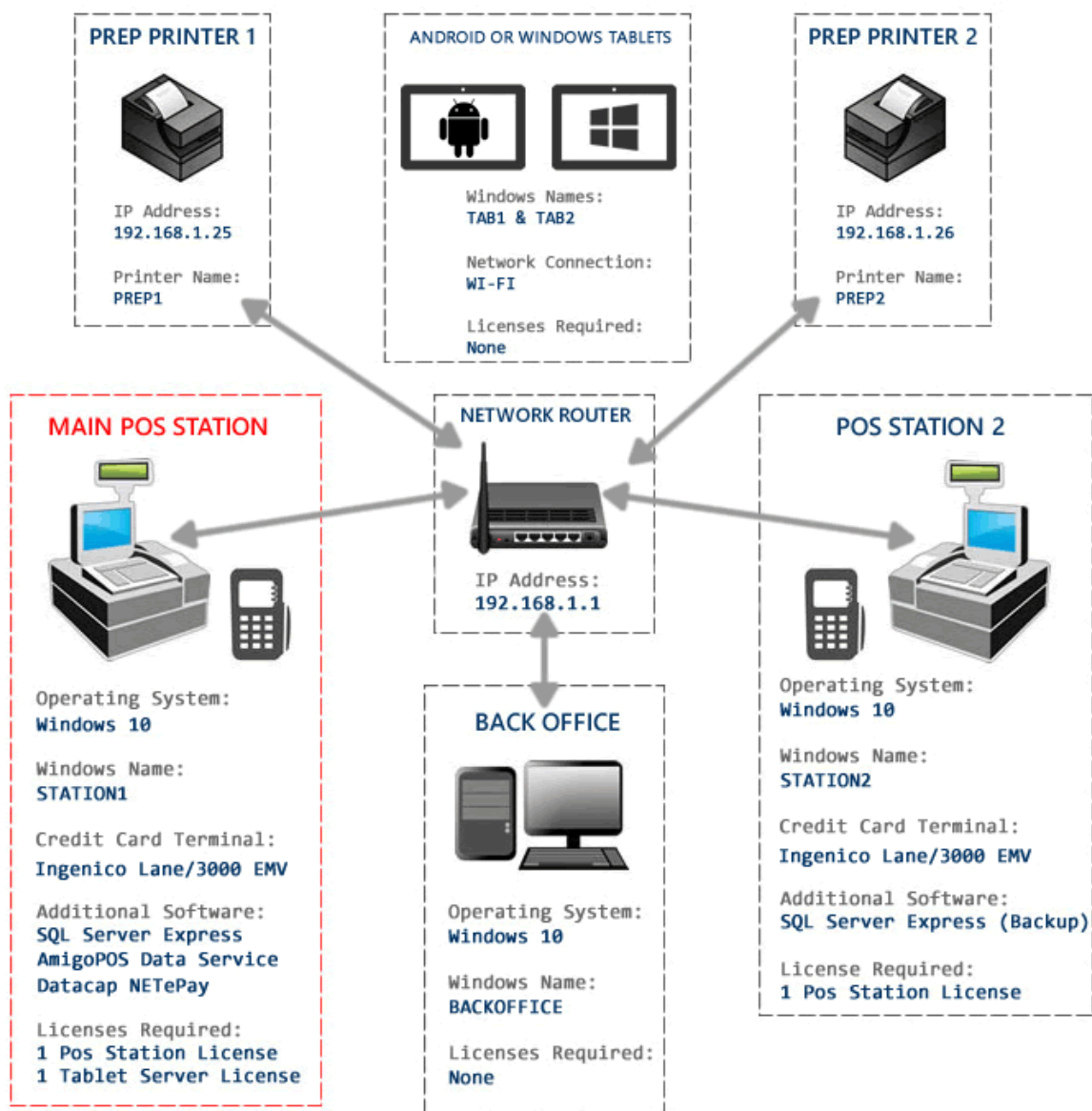
During installation, a backup of the installer is copied to the program installation directory. For example, on 32-bit Windows, the typical program installation directory is **C:\Program Files\AmigoPOS** and the installer backup is located in the directory named **Installers** and sub-directory named with the current date and program version, i.e. **C:\Program Files\AmigoPOS\Installers\1-2-2021-v9.0.22**. On 64-bit Windows, the directory is most likely **C:\Program Files (x86)\AmigoPOS\Installers\1-2-2021-v9.0.22**.



2.2 Typical System Setup

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 10 64-bit. The instructions are virtually identical for Windows 7, 8.1, 10 and 11 (32- and 64-bit). The estimated time to complete the following steps is 1-2 hours.

Verify that all devices except tablets are connected to the network router with a Cat6 Ethernet cable. The network type should be set to private network in Windows Control Panel | Network and Sharing Center.



Step 1: Main Pos Station

1. Power on the main pos station, power-off pos Station 2, power-off the back office computer and power-off both prep printers.
2. Verify that an internet connection is available, run Windows Update on the main pos station and reboot.
3. Install AmigoPOS on the main pos station using the default settings to install a new SQL Server Express instance and select the option to create a new database. The help file is not required as it will be installed on the back office workstation in Step 3.
4. Wait for the installation to complete and reboot the main pos station when prompted.
5. Double-click the Data Service Application icon in the desktop shortcuts folder.

6. Create a new database. Use an appropriate database name for easy identification, i.e. **MyRestaurantName**.
7. Click the settings icon at the lower right and set the Data Service application to start automatically with Windows.
8. Double-click the POS icon in the desktop shortcuts folder.
9. Verify that a new order can be submitted and recalled.
10. Note that the Data Service application on the main pos station must be running before attempting to run AmigoPOS on Station 2 or the back office computer.

Step 2: Pos Station 2

1. Verify that the Data Service application is running on the main pos station.
2. Power on Station 2.
3. Verify that an internet connection is available on Station 2, run Windows Update on the Station 2 and reboot.
4. Install AmigoPOS on Station 2. Select The Database Is On Another Computer on the database selection screen. The help file is not required as it will be installed on the back office workstation in Step 3.
5. Wait for the installation to complete and reboot Station 2 when prompted.
6. Double-click the POS icon in the desktop shortcuts folder on Station 2 and click Settings on the data service connection screen. Enter the Windows name of Station 1 and click Save. AmigoPOS will now connect to the data service application that is running on Station 1.

Step 3: Back Office Computer

1. Verify that the Data Service application is running on the main pos station.
2. Power on the back office computer.
3. Verify that an internet connection is available on the back office computer, run Windows Update on the back office computer and reboot.
4. Install AmigoPOS on the back office computer. Select The Database Is On Another Computer on the database selection screen and check the box to install the help file.
5. Wait for the installation to complete and reboot the back office computer when prompted.
6. Double-click the Back Office application icon in the desktop shortcuts folder and click Settings on the data service connection screen. Enter the Windows name of Station 1 and click Save. The back office application will now connect to the data service application that is running on Station 1.

Step 4: Prep Printer 1

Most pos impact printers are available with an integrated print server and include 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 as described in the prep printers [help topic](#)^[344].
5. Open the data service application at Station 1 and click Prep Ticket Server Settings. Enable Prep Printer 1, select the printer from the drop down list and select the printer type. Print a test prep ticket to verify that the settings are correct.

Step 5: Prep Printer 2

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 PREP2 using the Generic/Text Only driver as described in the prep printers [help topic](#)^[344].
5. Open the data service application at Station 1 and click Prep Ticket Server Settings. Enable Prep Printer 2, select the printer from the drop down list and select the printer type. Print a test prep ticket to verify that the settings are correct.

Step 6: Install Receipt Printers

Install the receipt printers at the main pos station and Station 2 as per the receipt printer [help topic](#)^[379].

Step 7: Configure Credit Card Processing

Install and configure Datacap NETePay credit card processing at the main pos station and Station 2 as per the Datacap NETePay [help topic](#)^[96].

Step 8: Install remaining devices

Install any remaining devices such as [barcode scanner](#)^[304], [customer display](#)^[343] or [scale](#)^[392].

2.3 Overview

The Microsoft SQL Server Express database engine is used by AmigoPOS because of its superior reliability and stability under heavy workloads. SQL Server Express is installed on the main pos station where the data service application is running. Client stations, back office computers, remote display computers and tablets do not connect to SQL Server Express.

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 5-10 minutes to the total setup time, depending on the

download speed. Windows 7 users should verify that Windows 7 Service Pack 1 and Microsoft .Net Framework 4 are installed before proceeding. Installation failures are often caused by failure to restart the workstation before running the AmigoPOS installer. The detailed system requirements for [SQL Server Express 2017](#) and [SQL Server Express 2014](#) are listed on the Microsoft web site.

SQL Server Version

Windows 10 32- and 64-Bit, Windows 8.1 32- and 64-Bit

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 10/8/8.1 ships with all of the prerequisites installed. Windows 8 users should update to Windows 8.1 before installing SQL Server Express (or AmigoPOS).

Windows 7/PosReady 7

SQL Server Express 2014 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. PosReady 7 does not typically ship with Service Pack 1 and Windows Update should be run before installing SQL Server Express.



Summary of Steps

1. Install AmigoPOS and SQL Server Express on the main pos station. 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.
2. Reboot and create a new database at the prompt.
3. The data service application will start automatically

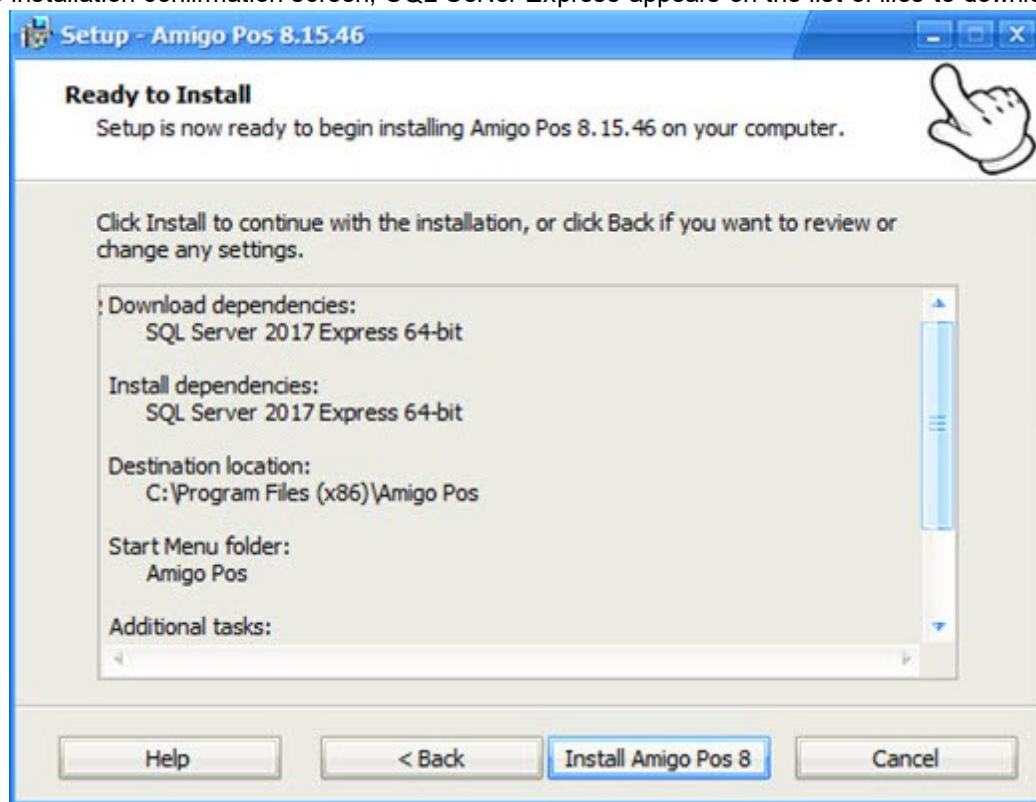
Main Pos Station

Installation Progress

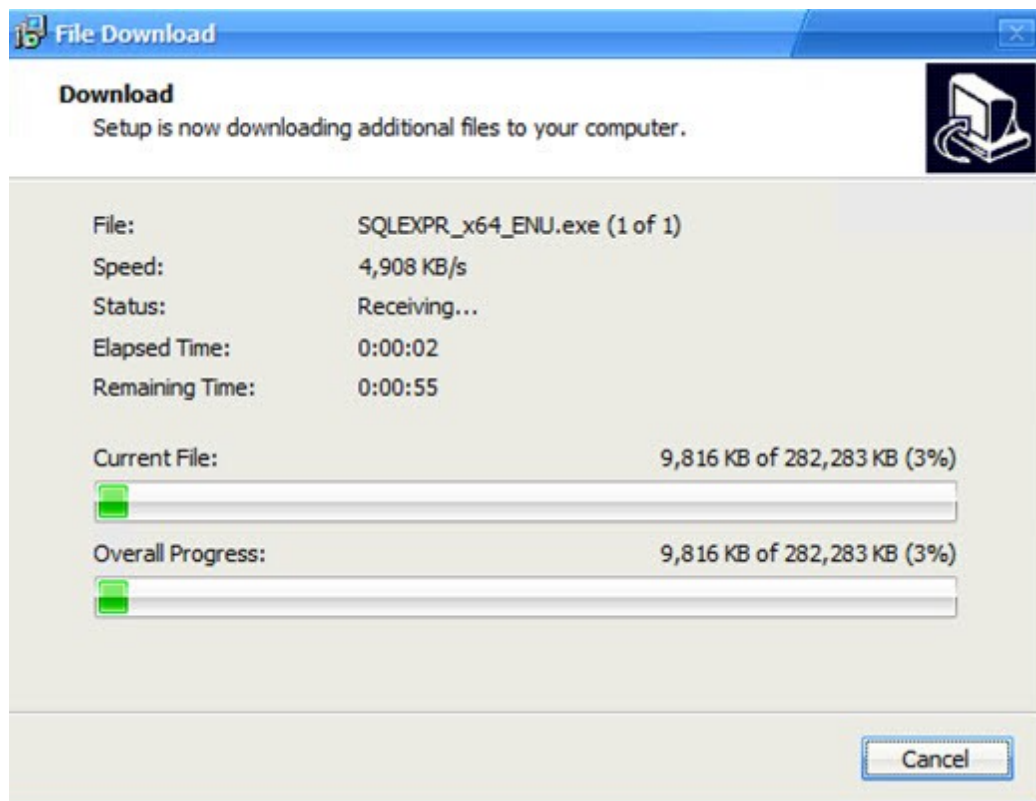
The following images describe the typical installation sequence of SQL Server Express. Total time is 5-10 minutes depending on the download speed, processor and available memory.



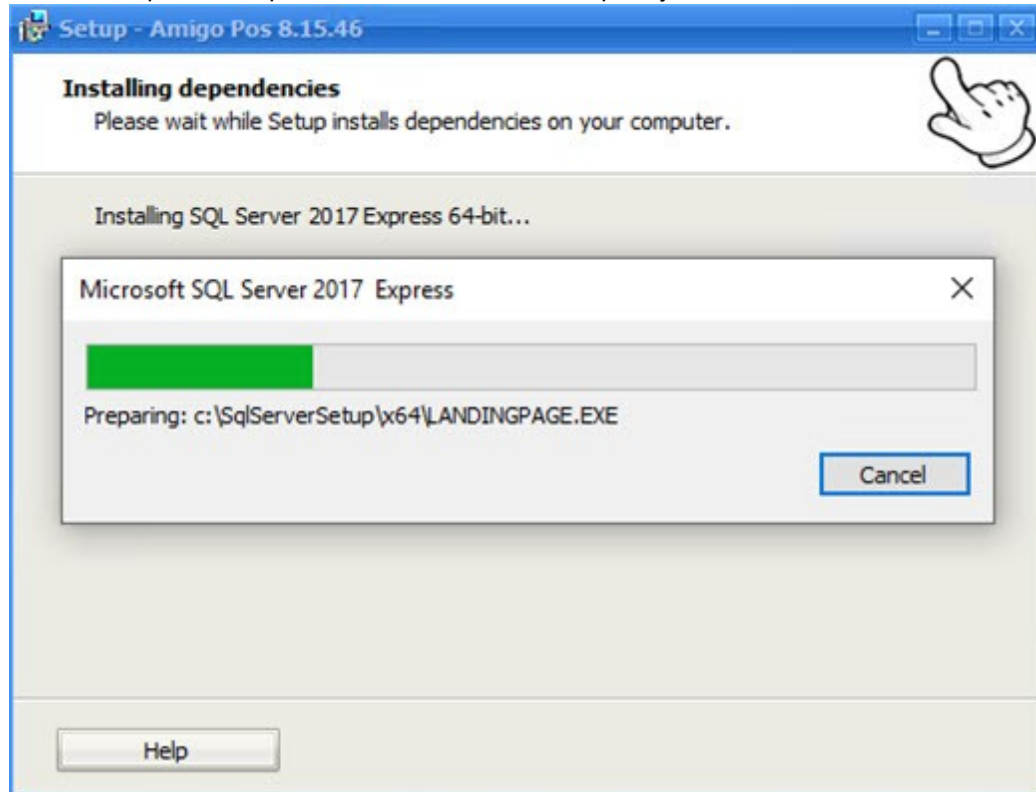
On the installation confirmation screen, SQL Server Express appears on the list of files to download.



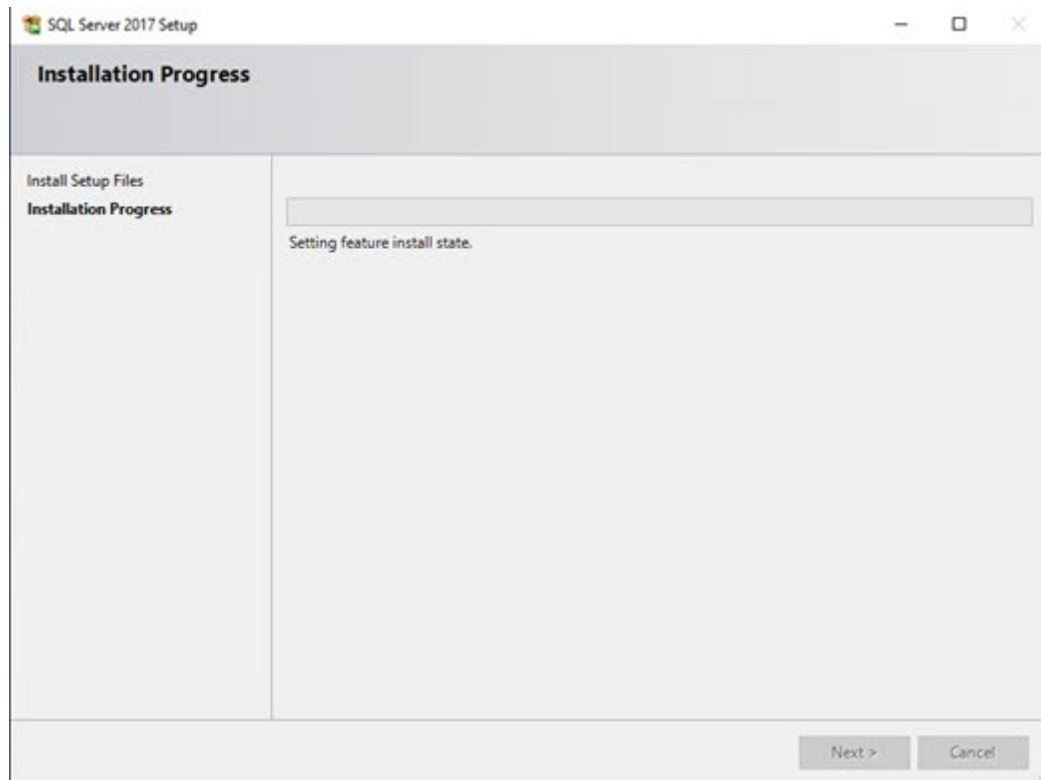
The download should require less than 5 minutes on a computer with a broadband internet connection



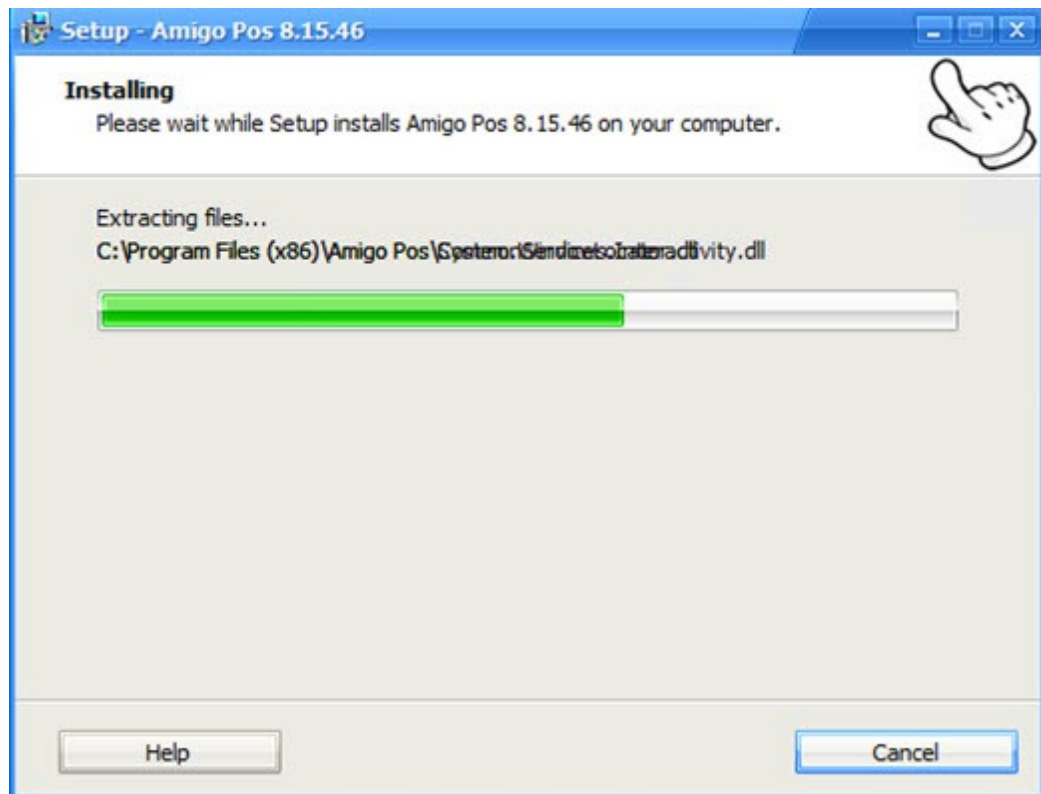
The SQL Server Express setup files are extracted to a temporary folder after the download is complete.



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

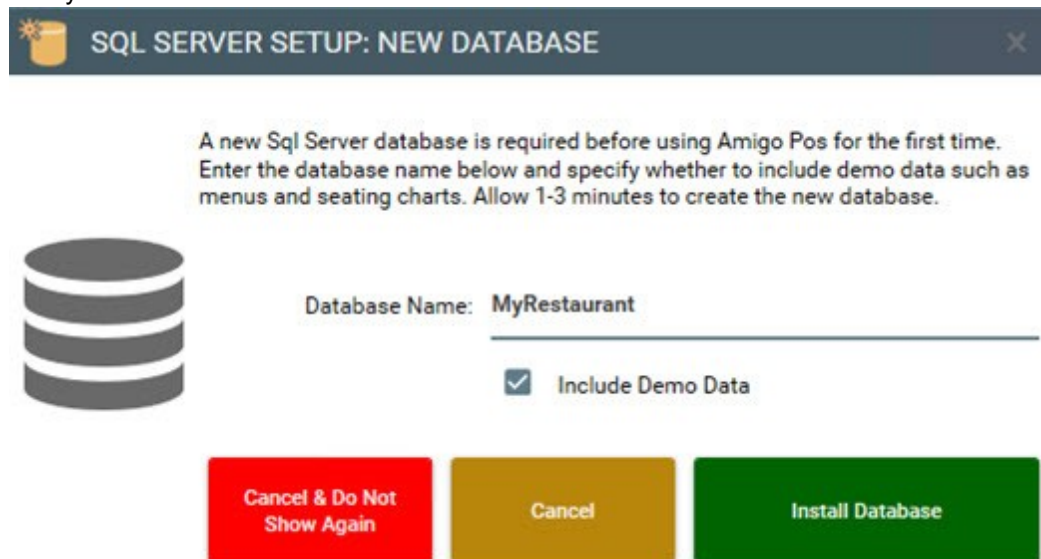


The AmigoPOS program files are copied to the program installation directory after SQL Server Express is installed.

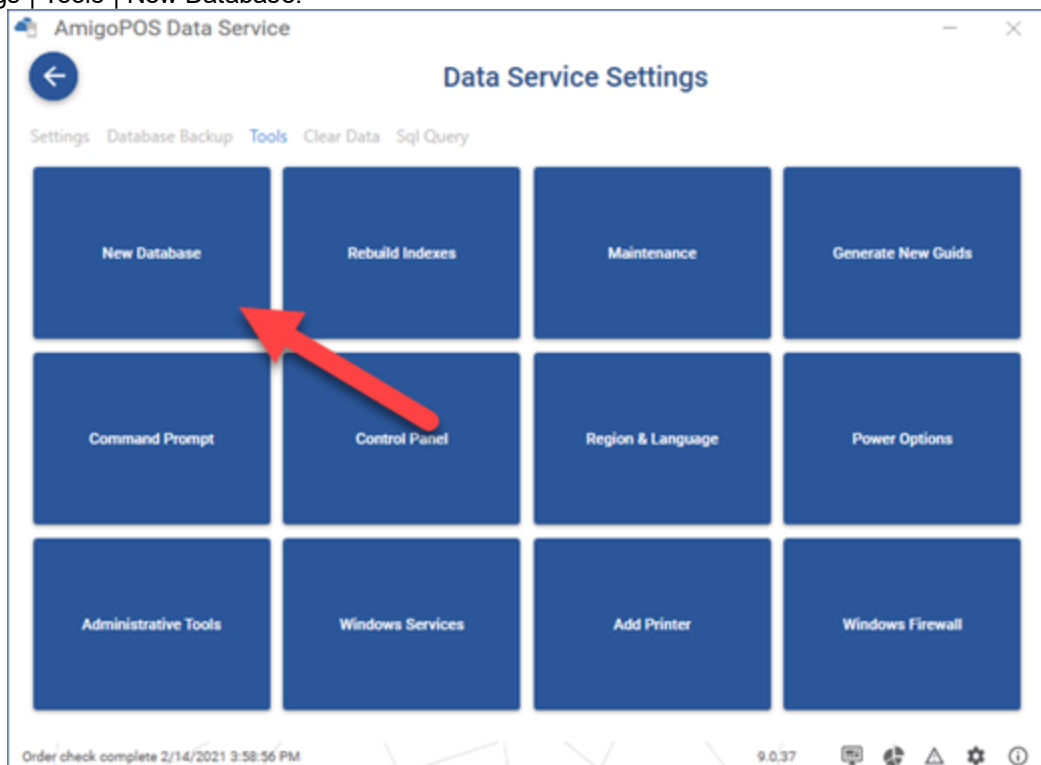


After AmigoPOS is installed, reboot the pos station and a prompt will appear to create a new database. Enter a database name (for example, enter the business name) and click Install Database to continue. If

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 computers. The data service application will start automatically after the new database is created.



Note that a new database can be created in the data service application by navigating to Data Service | Settings | Tools | New Database.



2.4 Prerequisites

Windows 10 and Windows 8.1 include the prerequisites to install SQL Server Express. Windows 7 and PosReady 7 users must verify that [Windows 7 Service Pack 1](#) and Microsoft .Net Framework 4.5 is installed. If not, run Windows Update and reboot.



MS SQL Server is disabled until prerequisites are installed

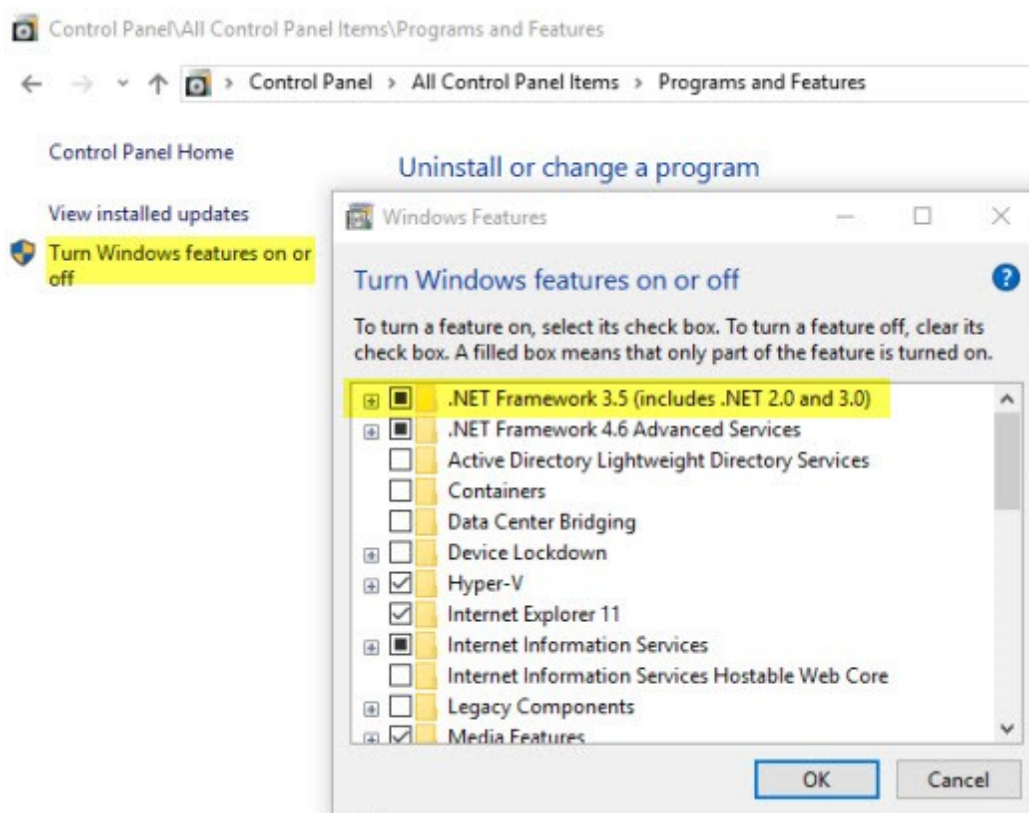
Microsoft .Net Framework 3.5 SP1

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 .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)



2.5 Firewall Exception

The data service application communicates using port 765. The following are typical scenarios for adding a firewall exception.

Automatic (using the default Windows Defender firewall)

The first time that the data service application is started, the user is prompted to create a new database and the application will start along with a prompt from Windows to add a firewall exception. Click Allow Access at the prompt and the data service application will be able to communicate using port 765 with other computers on the local network.

Manual (using the default Windows Defender firewall)

A firewall exception can be added to Windows Defender firewall by opening Windows Control Panel/Windows Defender Firewall and adding an exception for DataService.exe, typically located in C:\Program Files (x86)\Amigo Pos.

Manual (3rd party firewall)

Refer to the software vendor's website for specific instructions.

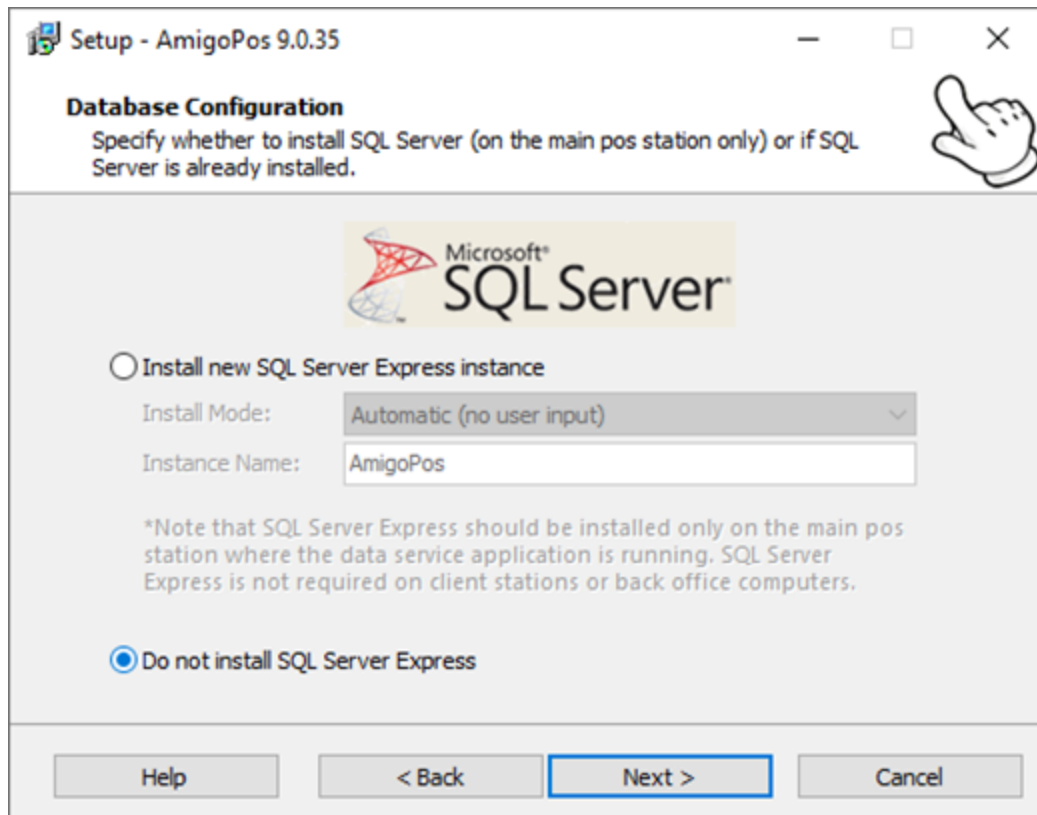
- Kaspersky: <https://support.kaspersky.com/11444>
- ESET: https://support.eset.com/kb2843/?locale=en_US&viewlocale=en_US
- McAfee: <https://service.mcafee.com/webcenter/portal/cp/home/articleview?articleId=TS100813>

2.6 Client Computers

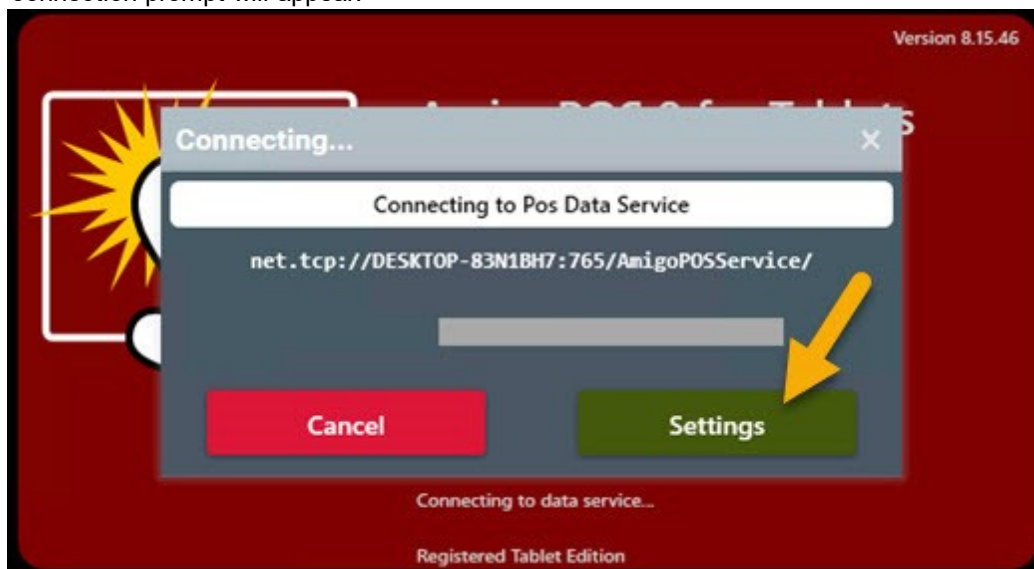
Additional pos stations, back office computers, remote display computers and tablets can quickly connect to the data service running at the main pos station by entering the Windows name or IP address of the main pos station.

Additional Station Installation

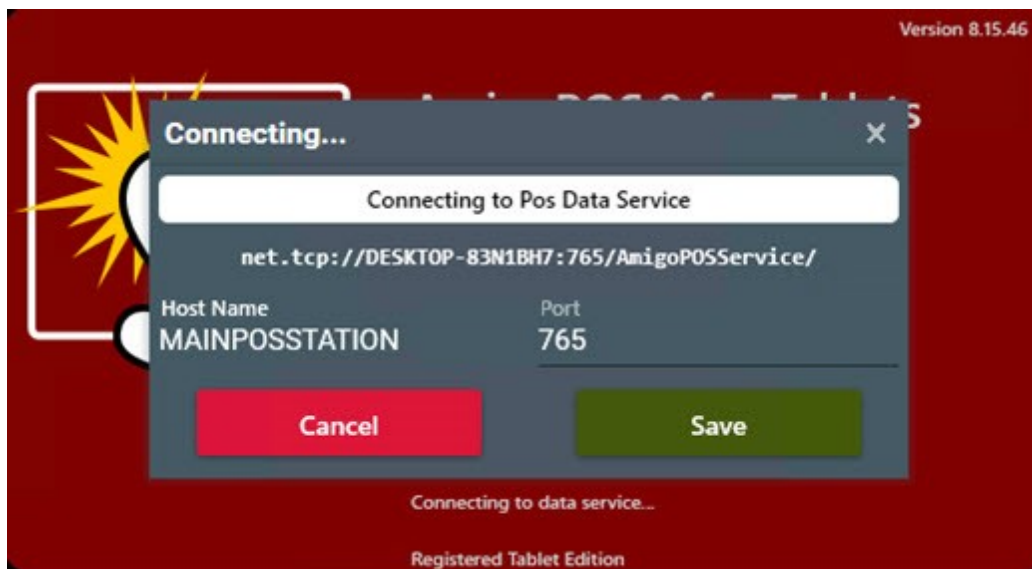
When installing AmigoPOS on the client computer, select Do not install SQL Server Express. Complete the installation and reboot.



Run the application (pos, tablet pos, remote display, back office, or quickbooks interface) and the data service connection prompt will appear.



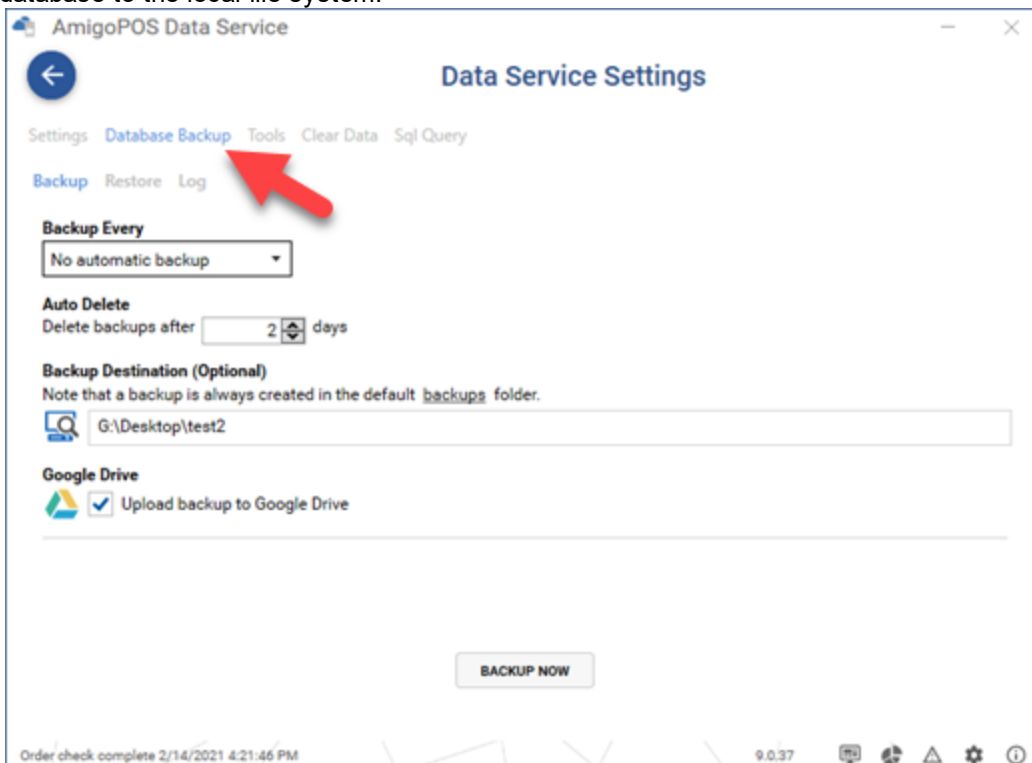
Click Settings and enter the Windows name of the main pos station where the data service application is running. Click Save and the application will resume the connection attempt.



If the application is still not able to connect, verify that the firewall on the main pos station is not blocking the data service application port 765. Refer to the [firewall](#) ^[33] topic for additional information.

2.7 Database Backup

The data service application includes the SQL Server Backup & Restore utility that can automatically backup the database. The utility is available by clicking Settings under the Data Service tab. Important note: If the database exceeds 100MB, a 3rd party backup and restore utility such as [SQL Backup Master Setup](#) ^[26] is recommended for maximum reliability and performance. Utilities generally use the Windows task scheduler to automatically backup and compress the database on a daily basis and do not affect the performance of the pos or data service. 3rd party are free to use when backing up a single database to the local file system.



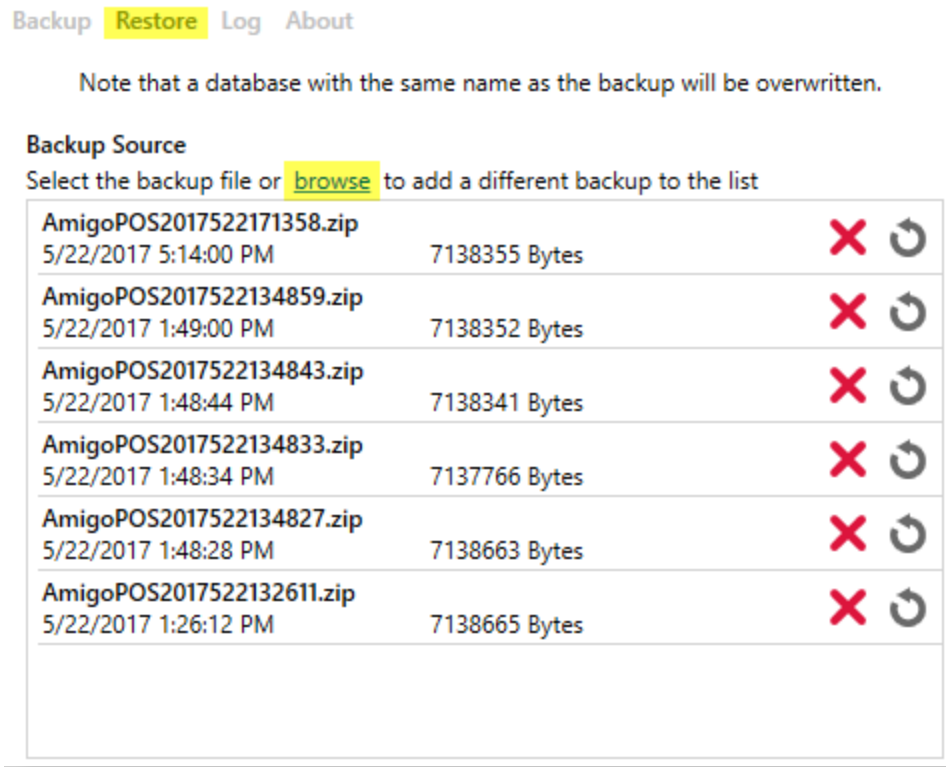
Default Backups Folder

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 Database Backup tab:

- **Backup Every**
 - No automatic backup: Disable automatic backup
 - 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
 - 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 computer or removable USB flash drive, so that a backup is available in the event of local disk failure.
- **Google Drive**³⁷: Automatically upload a compressed backup to your Google Drive account each time a backup is created.



Database Restore

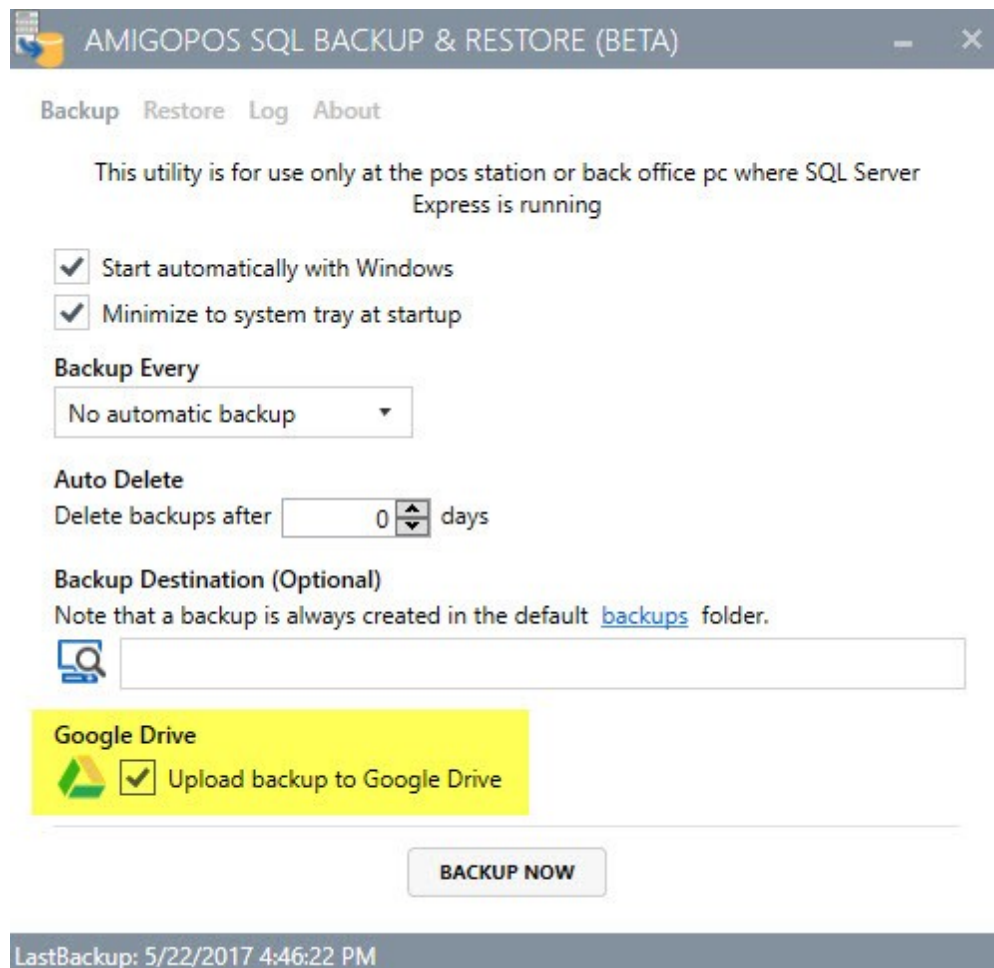
Click the Restore tab to view a list of all database backups that are located in the AmigoPOS SQL Backups folder. The files are ordered by date with the most recent backup at the top of the list. Each compressed backup file name includes the database name and the backup date and time, i.e. DatabaseNameYMDhms.zip.

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.

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'. Under 'Auto Delete', 'Delete backups after' is set to '0' days. The 'Backup Destination (Optional)' section includes a note that backups are created in the default 'backups' folder and a file explorer icon next to an empty text box. A yellow box highlights the 'Google Drive' section, which has 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.



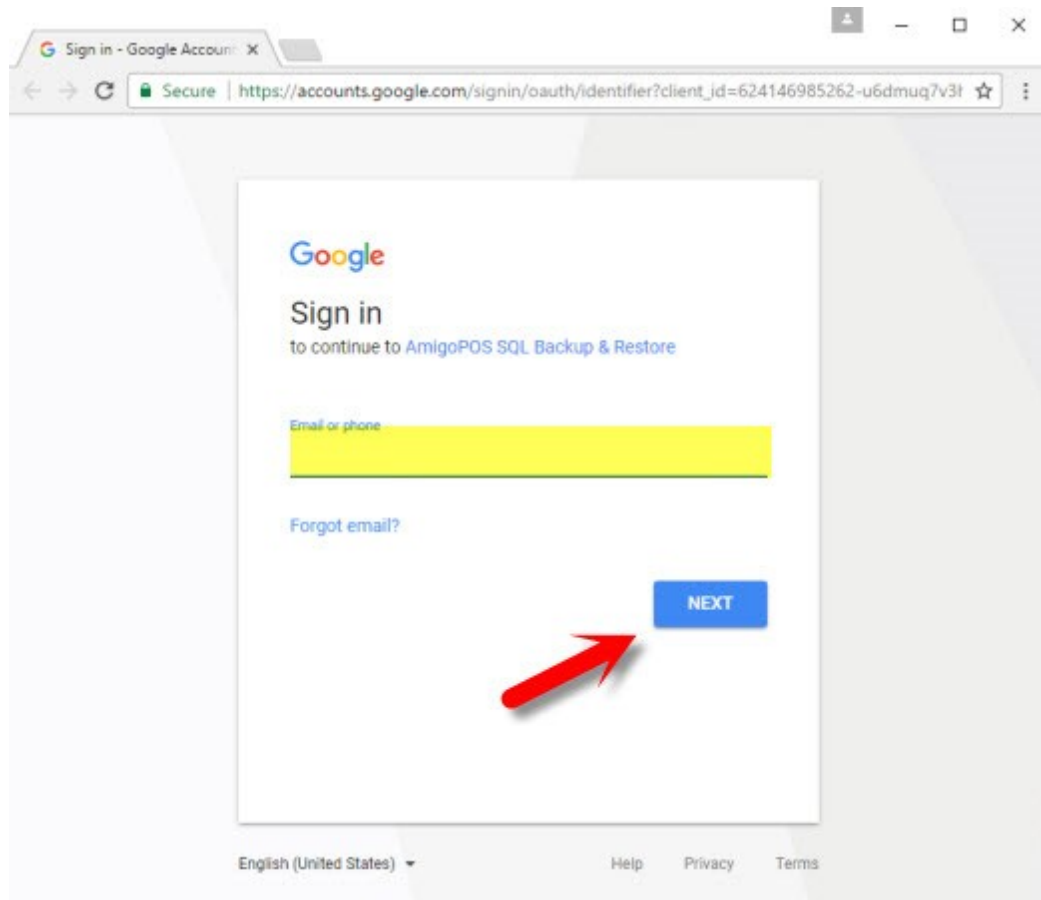
Google Drive

☒ Upload backup to Google Drive

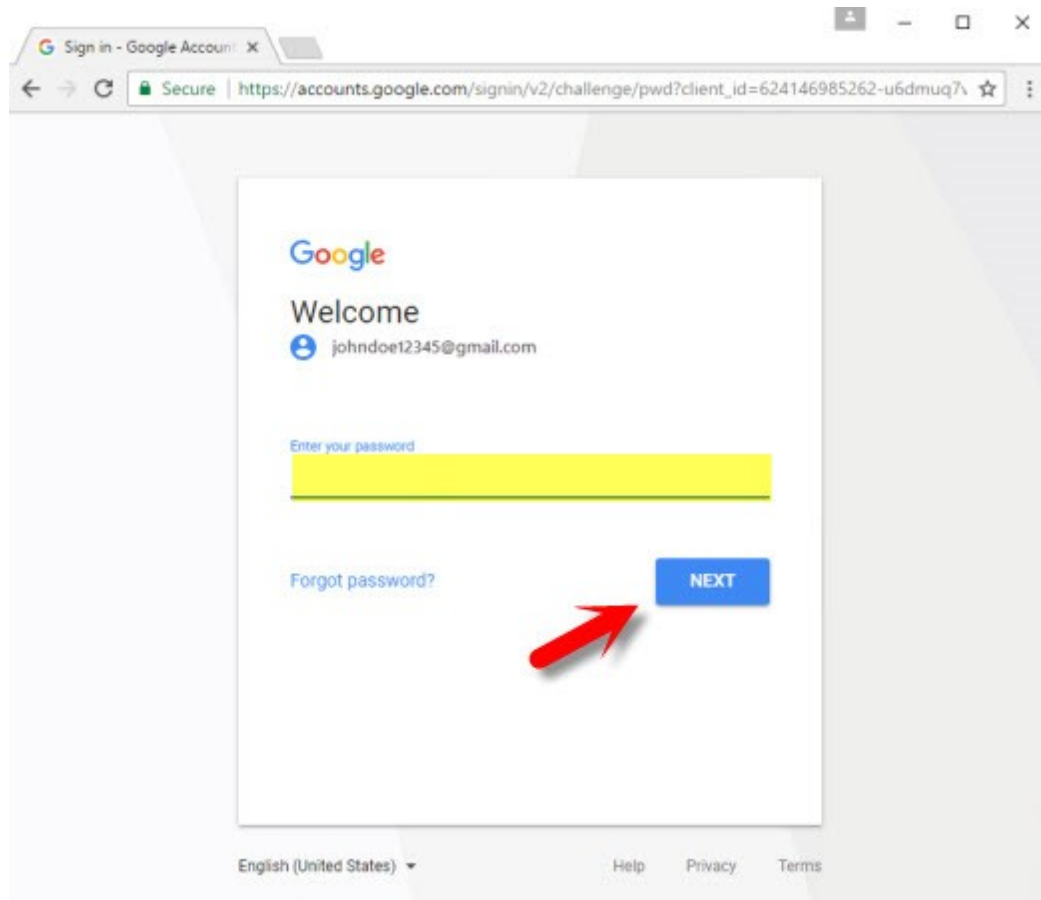
BACKUP NOW

LastBackup: 5/22/2017 4:46:22 PM

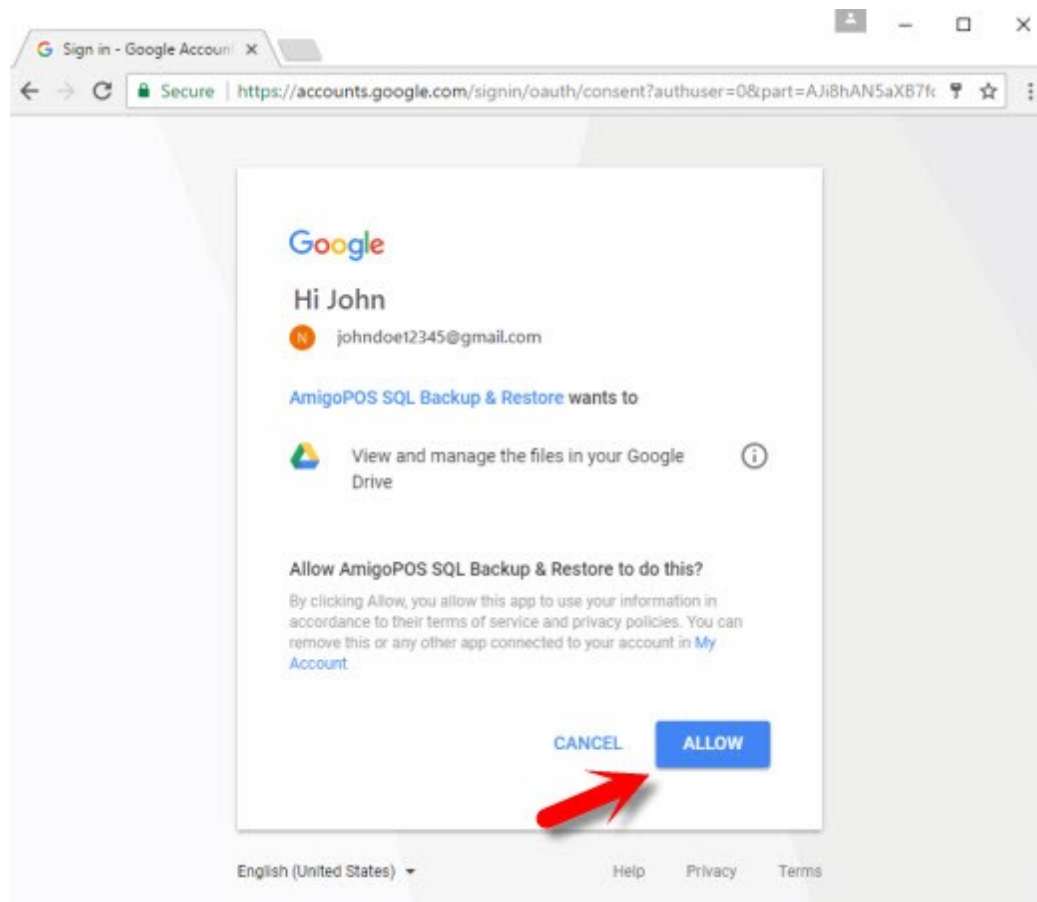
Click Backup Now to create a backup. A web browser will automatically launch prompting the user for the Google email or phone. Enter the email or phone and click **Next** to continue.



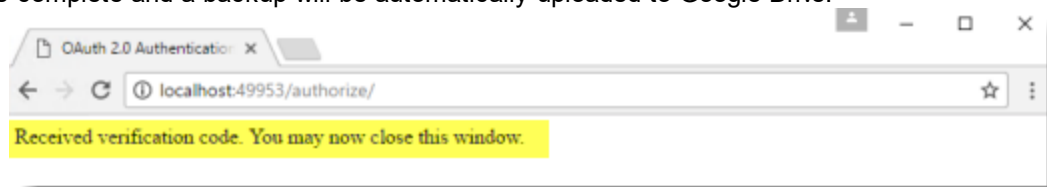
Enter the password and click **Next** to continue.



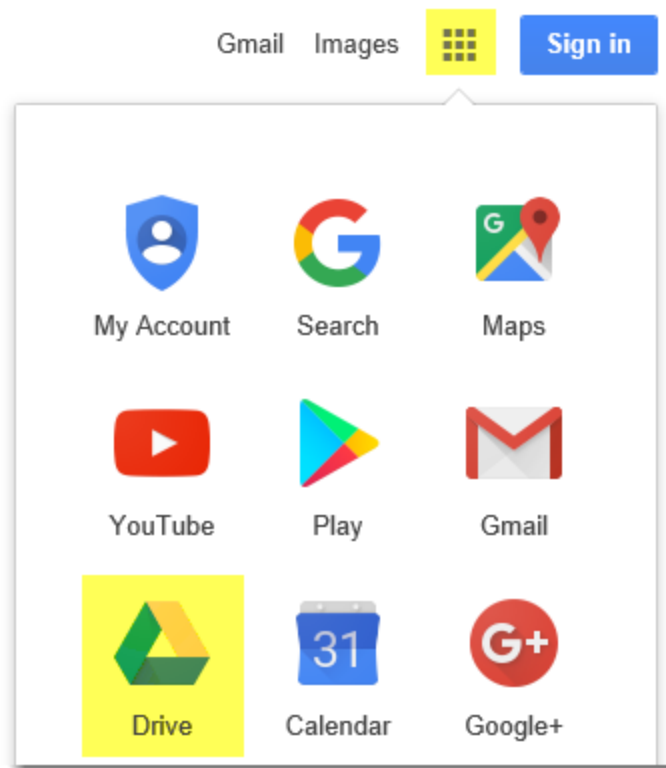
Verify that you are giving access to AmigoPOS SQL Backup & Restore by clicking **Allow**.



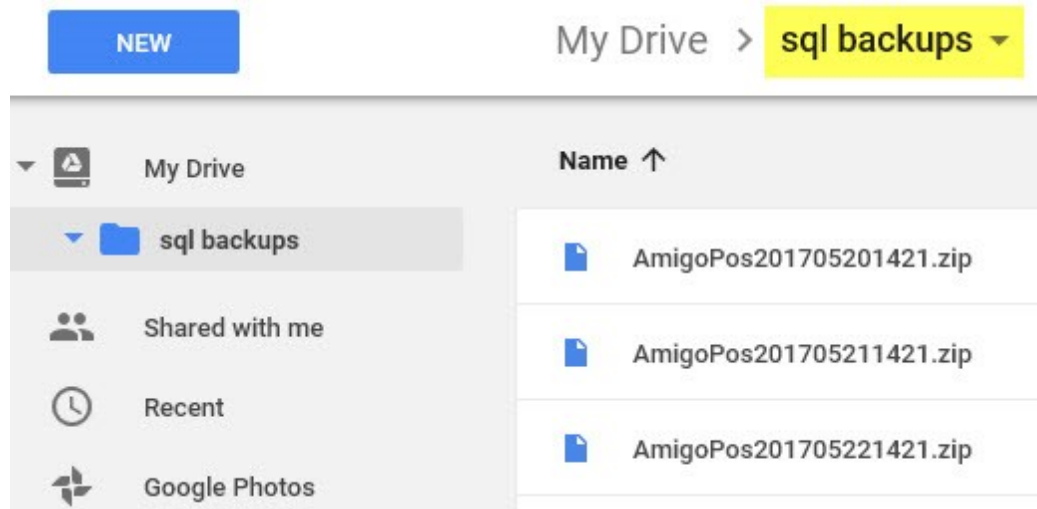
Set is complete and a backup will be automatically uploaded to Google Drive.



Login to Google and click the Google Drive icon.

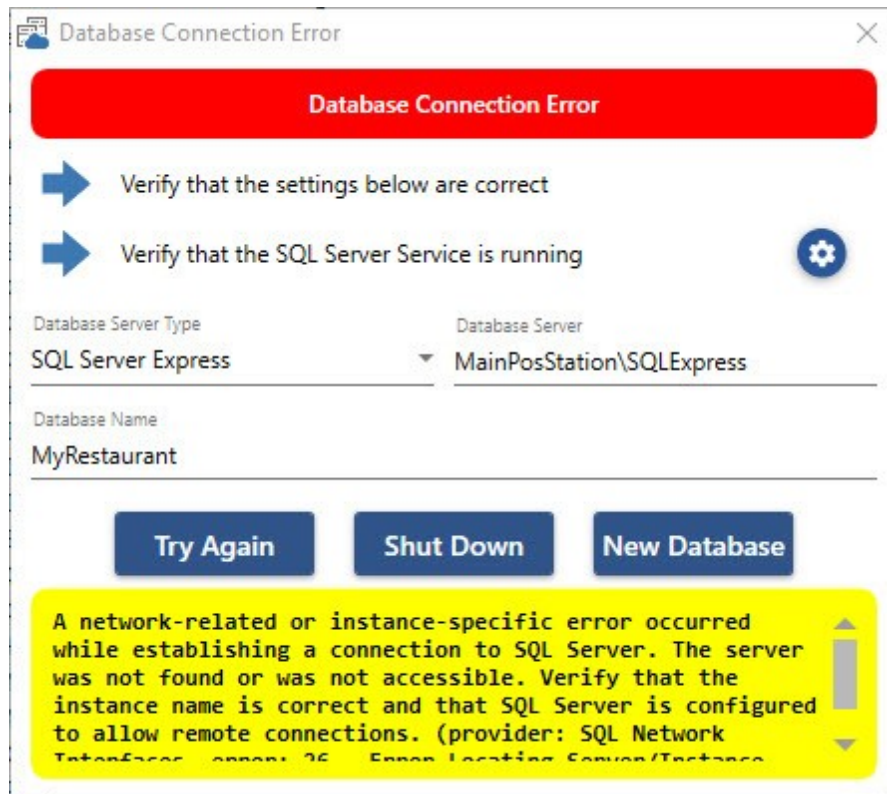


Create a backup and verify that it appears in the **My Drive | sql backups** folder.

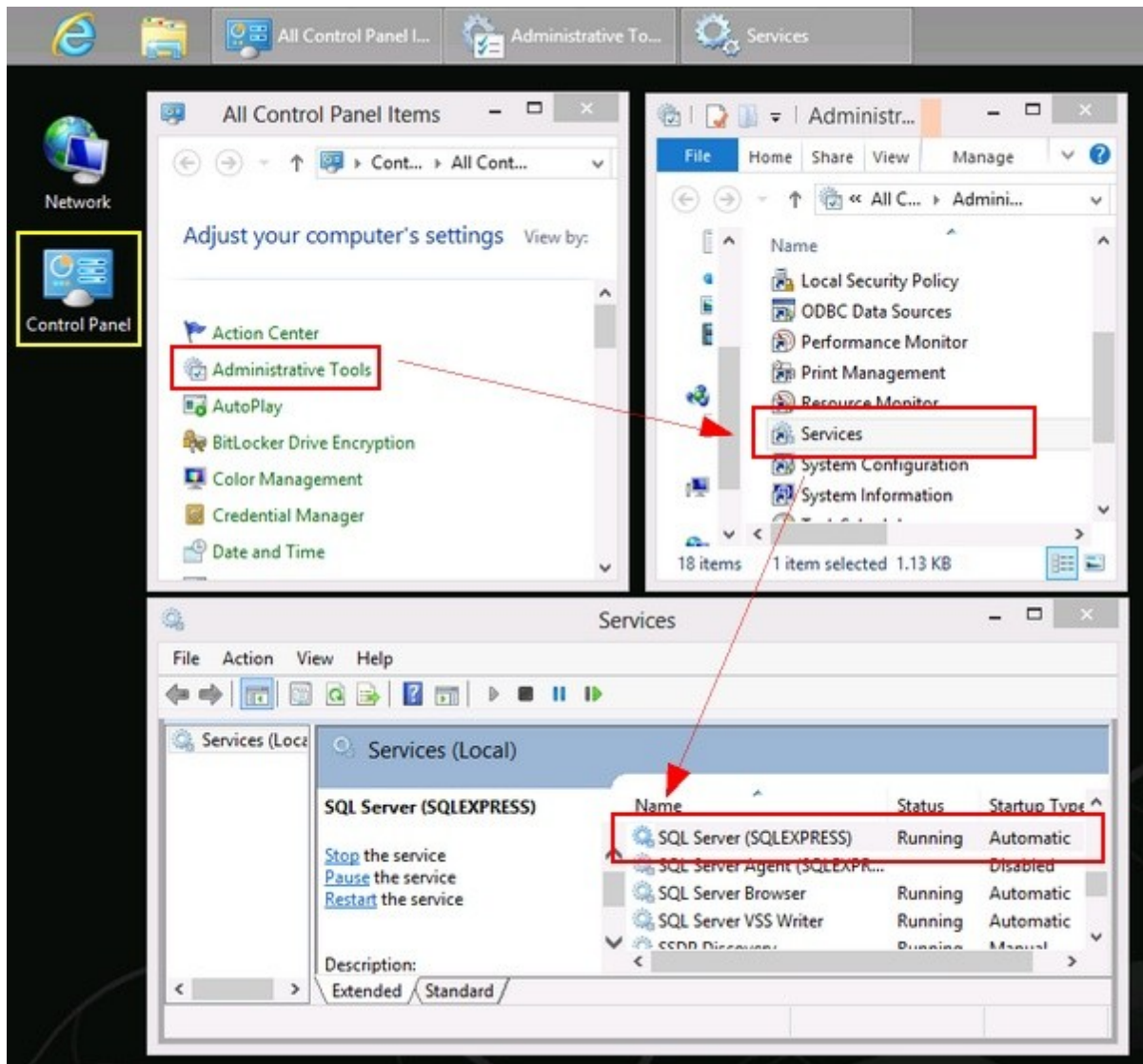


2.8 Troubleshooting

The data service application will attempt to connect to SQL Server at program startup. If the connection fails, the Connection Error message will appear as shown below. Click Try Again in case the service was delayed in starting. If the connection does not succeed, verify that the SQL Server Express instance is running, as described below.

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

In some cases (usually on Windows 8.1 32-Bit computers), the service restart may be delayed. Either reboot the computer or manually check to verify that the SQL Server 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.



2.9 Program Updates

Frequent updates with new features and fixes are made available for download at amigopos.com and can be installed over an existing release without uninstalling first. A list of new features and fixes is available at <https://twitter.com/amigopos>.

To install an update:

1. [Back up](#) the SQL Server database
2. Download the latest release at <https://amigopos.com/Download/Version9>. 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.

2.10 Update Version 8 to 9

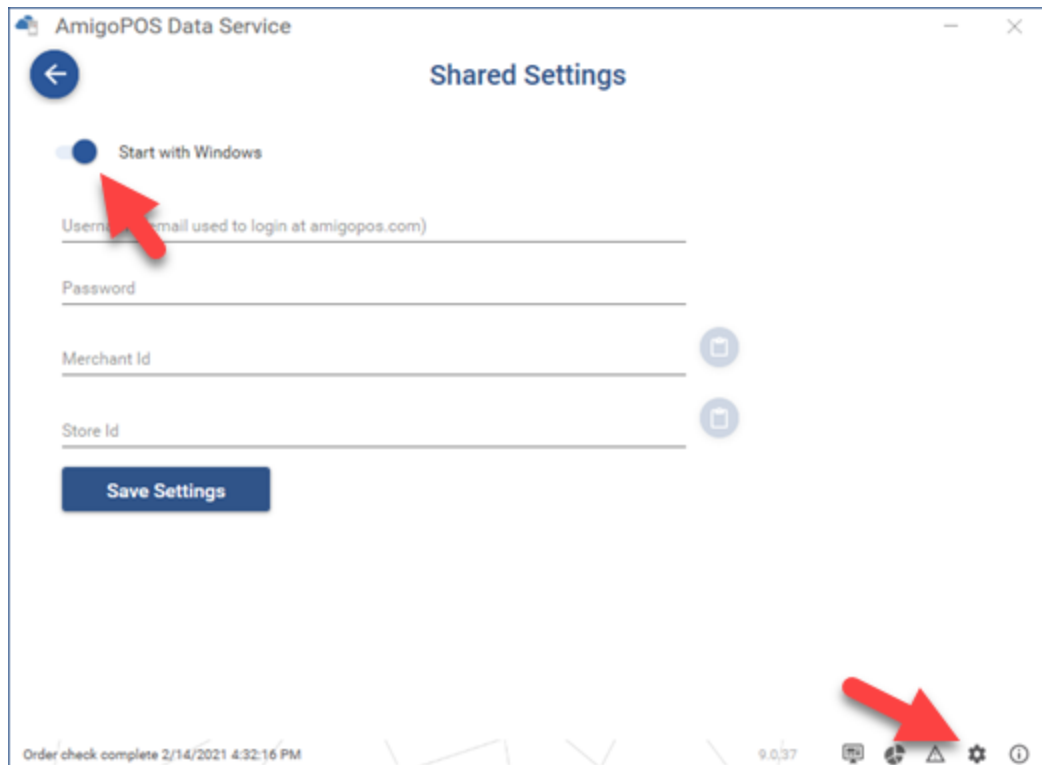
Users of AmigoPOS 8.17 or later can skip the first 10 update steps listed below and install version 9 after backing up the database. All users must configure the default [customer receipt template](#)^[186] after installing version 9.

This topic is intended for AmigoPOS 8.15 or older version users that are updating to version 9. Note that the [data service application](#)^[228] is a new application that simplifies pos station setup and provides improved performance and reliability.

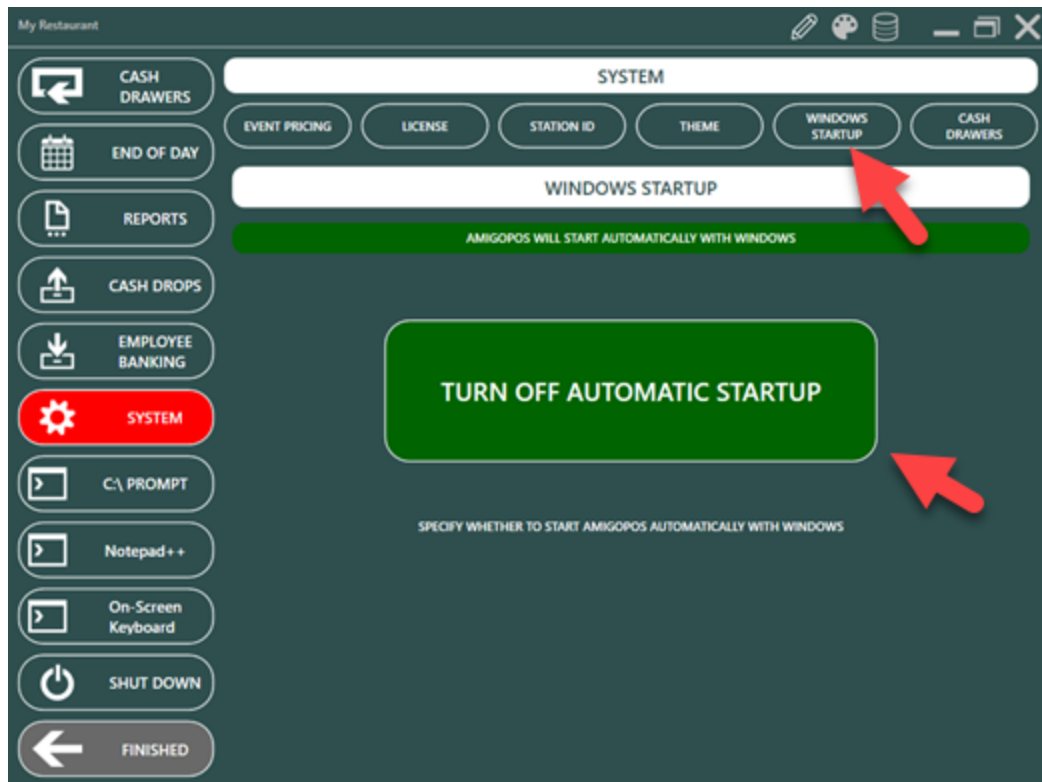
If you require remote assistance with the update and have a broadband internet connection, please submit a [support ticket](#). Include the business name, preferred date/time with time zone, and the total number of pos stations, back office computers, remote display computers and tablets.

Summary Of Steps

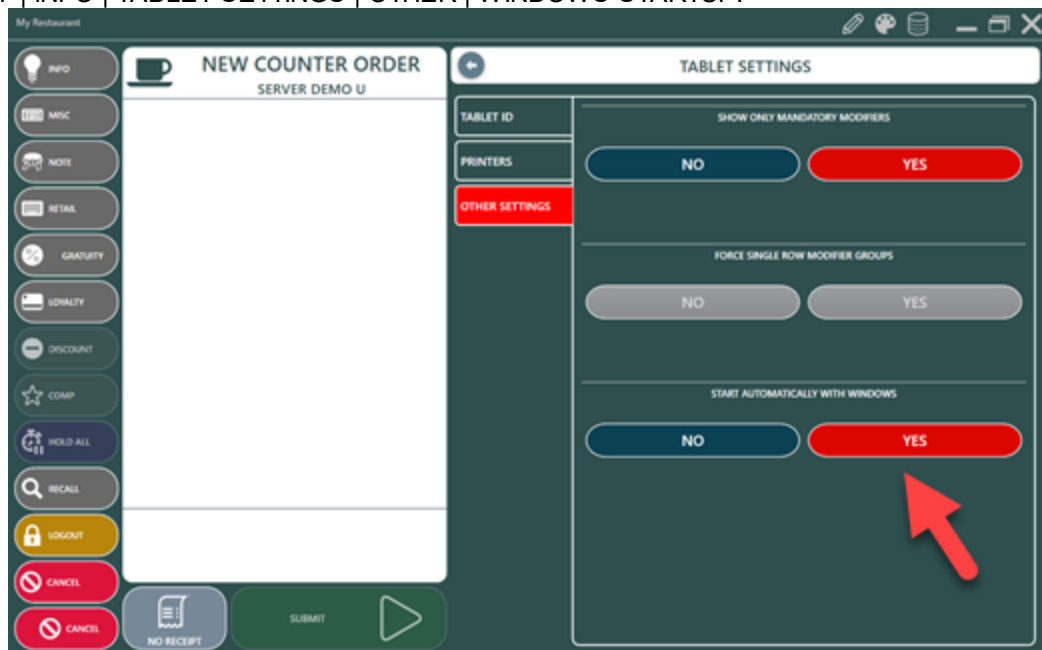
1. [Database Backup](#)^[45]
 2. [Delete Shortcuts](#)^[45]
 3. [Installation](#)^[45]
 4. [Set Data Service Automatic Startup](#)^[45]
 5. [Firewall Exception](#)^[45]
 6. [Configure Clients](#)^[45]
 7. [Set POS Automatic Startup](#)^[45]
 8. [Set Tablet POS Automatic Startup](#)^[45]
 9. [Configure Prep Ticket Server](#)^[45]
 10. [Configure Custom Reports](#)^[45]
 11. [Configure Customer Receipt Template](#)^[186]
1. [Backup](#)^[35] your current database in case an installation error occurs.
 2. Most application shortcuts now include startup parameters. The version 9 installer will automatically delete and recreate the program group shortcuts folder and the desktop shortcuts folder. Manually delete any other pos, tablet pos, back office, the remote display application and the Quickbooks interface shortcuts.
 3. Install [AmigoPOS version 9](#) on all pos stations, back office computers, remote display computers and tablets.
 4. Run the data service application at the main pos station where SQL Server is running and set it to start automatically with Windows. Click the small gear icon at the bottom right to access the shared settings and toggle the Start with Windows switch to the ON position.



5. Add a [firewall exception](#) ³³ for the data service application or set an exception for port 765.
6. Open an AmigoPOS application (pos, tablet pos, back office, remote display or quickbooks interface) at the client computers and enter the Windows name of the computer where the data service application is running on the data service connection screen.
7. The pos can be set to started automatically with Windows by enabling the setting in MANAGER | SYSTEM | WINDOWS STARTUP.



8. The tablet pos can be set to start automatically with Windows by enabling the setting in ORDER ENTRY | INFO | TABLET SETTINGS | OTHER | WINDOWS STARTUP.



9. Configure the prep printers in the data service application as described in the [prep ticket server](#) ²³⁶ topic.

10. If custom reports are in use, set a [direct database connection](#) ⁷⁹⁴ for the report designer and custom report viewer.

Update Details

Database Connectivity

AmigoPOS 9 no longer relies on a direct database connection from the pos, back office, remote display, or QuickBooks interface. The data service application runs on the main pos station and serves data to the pos, back office and other applications over the network.

Some advantages of using the data service application instead of a direct database connection:

- **Database Security:** SQL Server no longer requires the TCP/IP or Names Pipes protocols. Since the data service application is the only application that connects to the database server and runs on the same computer as SQL Server, the default Shared Memory protocol is sufficient. In addition, there is no longer a need to enable the system sa account, set a password or set firewall exceptions.
- **Station Setup:** Pos Stations, back office computers, remote display computers and tablets no longer require a complicated setup process to connect to the database server. Setup is as simple as entering the name of the computer on which the data service application is running.
- **Performance:** The data service application provides far better performance and reliability than a direct database connection.

Prep Ticket Server

AmigoPOS 9 does not require prep printers to be installed on each pos station. Prep printers are installed only at the main pos station where the data service application is running. In addition, all prep printer settings are stored in the local database instead of the system registry.

Tablet Server

AmigoPOS 9 no longer includes a separate tablet server application. The tablet server is a component of the data service application.

Online Ordering Client

AmigoPOS 9 no longer requires a separate online ordering client to receive orders from the online ordering cloud service. The online ordering client is a component of the data service application.

Call Center Client

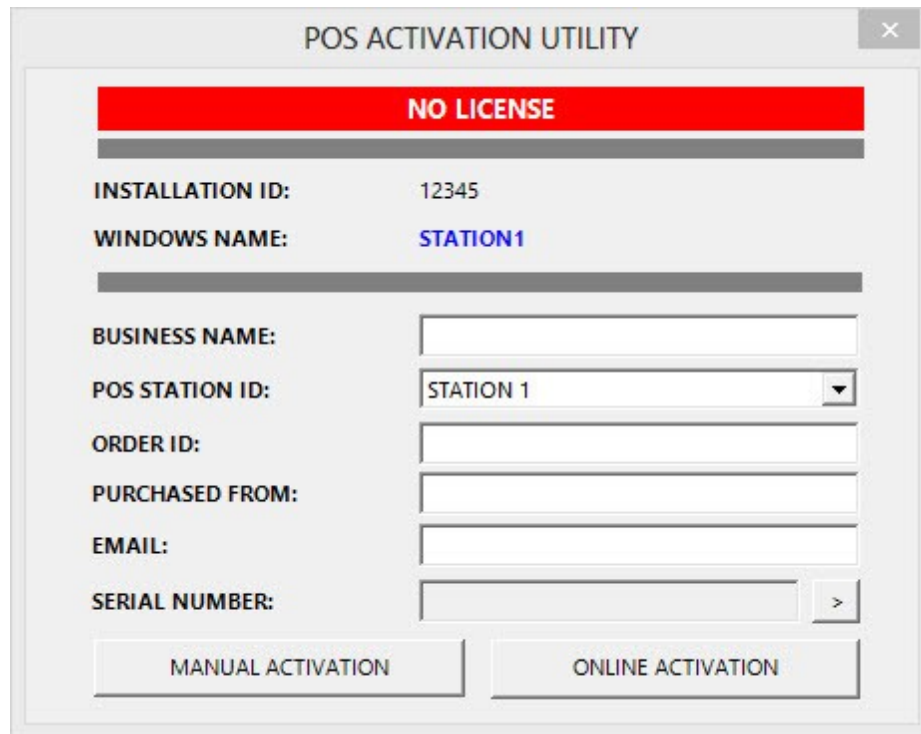
AmigoPOS 9 no longer requires a separate call center client to receive orders from the call center cloud service. The call center client is a component of the data service application.

2.11 Licensing

Complete the following procedure is used to license AmigoPOS 9. 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 is sent with instructions to download and install the AmigoPOS 9 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.

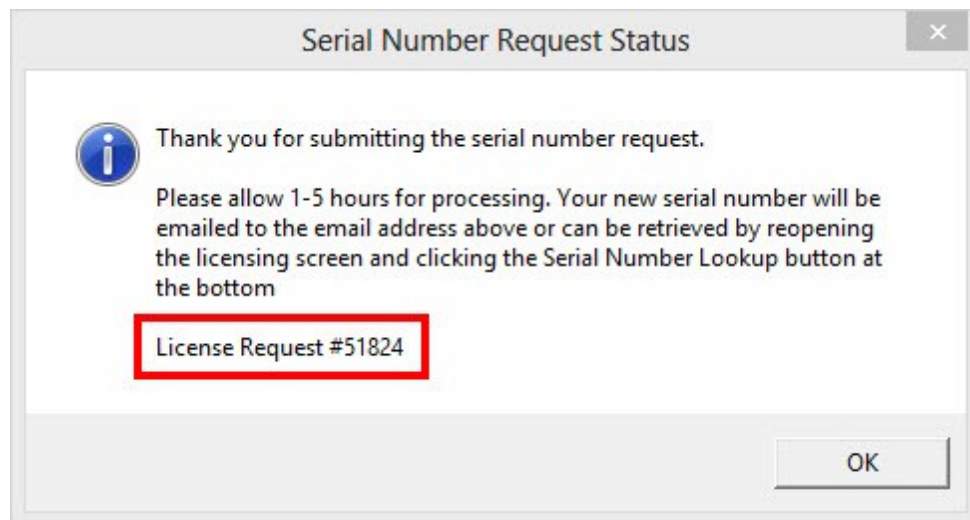


2. All information entered is permanent and is used to generate a unique serial number to license the pos station. Enter the business name as it should appear on the first line of the customer receipt (below the logo). Select a unique pos station id. Note that 2 pos stations may not share the same station 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.



The image shows a 'POS ACTIVATION UTILITY' dialog box. At the top, a red banner reads 'NO LICENSE'. Below this, the 'INSTALLATION ID' is '12345' and the 'WINDOWS NAME' is 'STATION1'. There are several input fields: 'BUSINESS NAME', 'POS STATION ID' (a dropdown menu showing 'STATION 1'), 'ORDER ID', 'PURCHASED FROM', 'EMAIL', and 'SERIAL NUMBER' (with a right arrow button). At the bottom are two buttons: 'MANUAL ACTIVATION' and 'ONLINE ACTIVATION'.

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.



The image shows a 'Serial Number Request Status' dialog box. It contains an information icon and the text: 'Thank you for submitting the serial number request. Please allow 1-5 hours for processing. Your new serial number will be emailed to the email address above or can be retrieved by reopening the licensing screen and clicking the Serial Number Lookup button at the bottom'. Below this text, 'License Request #51824' is displayed and highlighted with a red rectangle. An 'OK' button is at the bottom right.

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.

POS ACTIVATION UTILITY

NO LICENSE

INSTALLATION ID: 12345

WINDOWS NAME: STATION1

BUSINESS NAME: My Restaurant

POS STATION ID: STATION 1

ORDER ID: 00001

PURCHASED FROM: amigopos.com

EMAIL: support@amigopos.com

SERIAL NUMBER: >

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.

POS ACTIVATION UTILITY

REGISTERED

Activation Successful

Serial number retrieval successful. Please restart Amigo Pos to complete activation

OK

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.

2.12 System Requirements

The following are minimum system requirements to successfully install and run AmigoPOS 9:

Operating System

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

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

- 2 GB Ram (4GB Recommended)
- Intel i3 or equivalent
- Monitor capable of 1024x768px screen resolution or greater.
- Replacing the HDD with an inexpensive SSD will dramatically improve performance

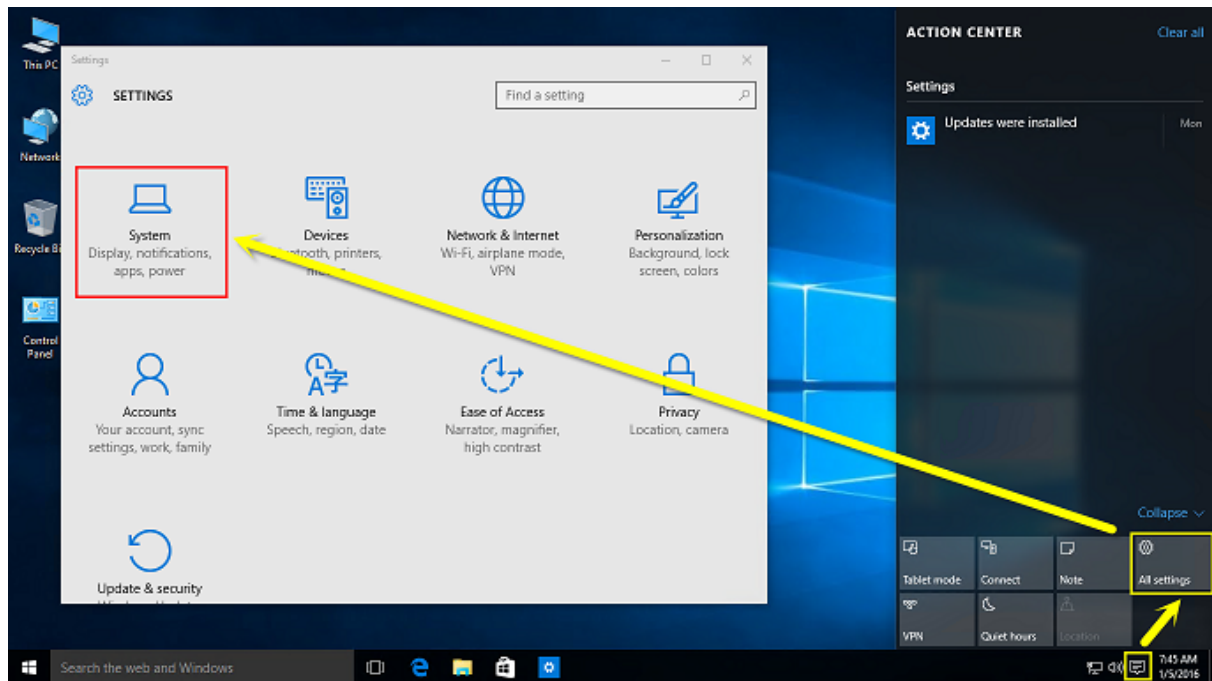
Network

- 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.

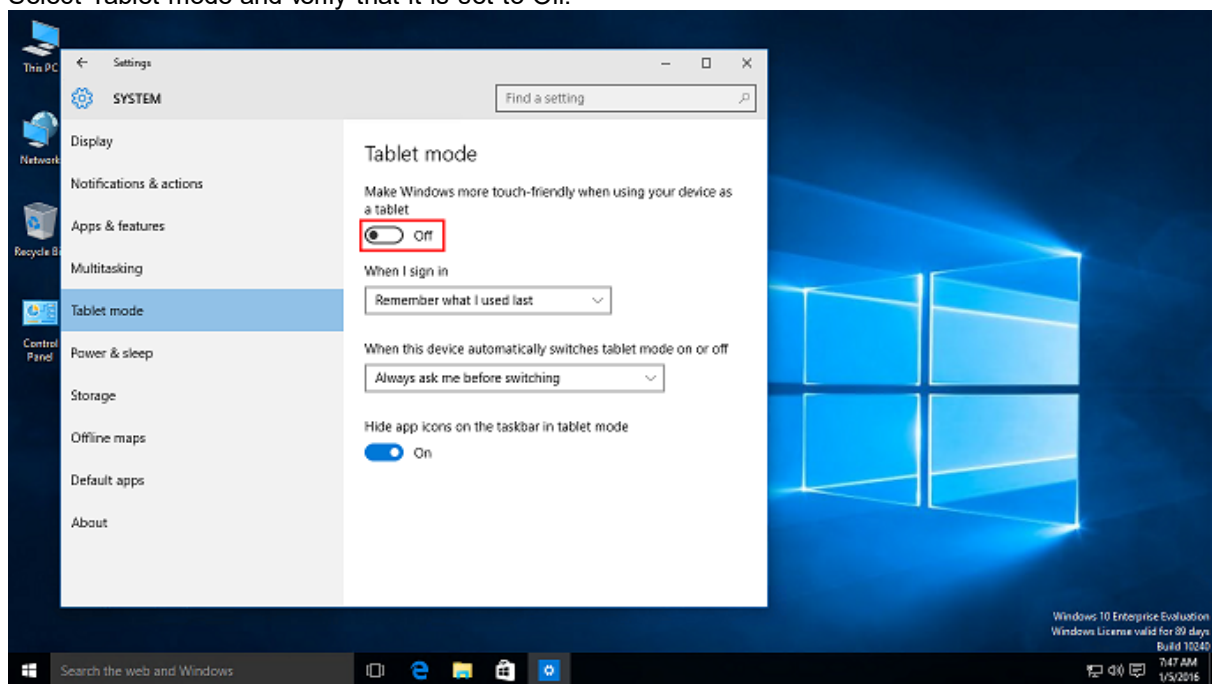
2.13 Windows 10

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.

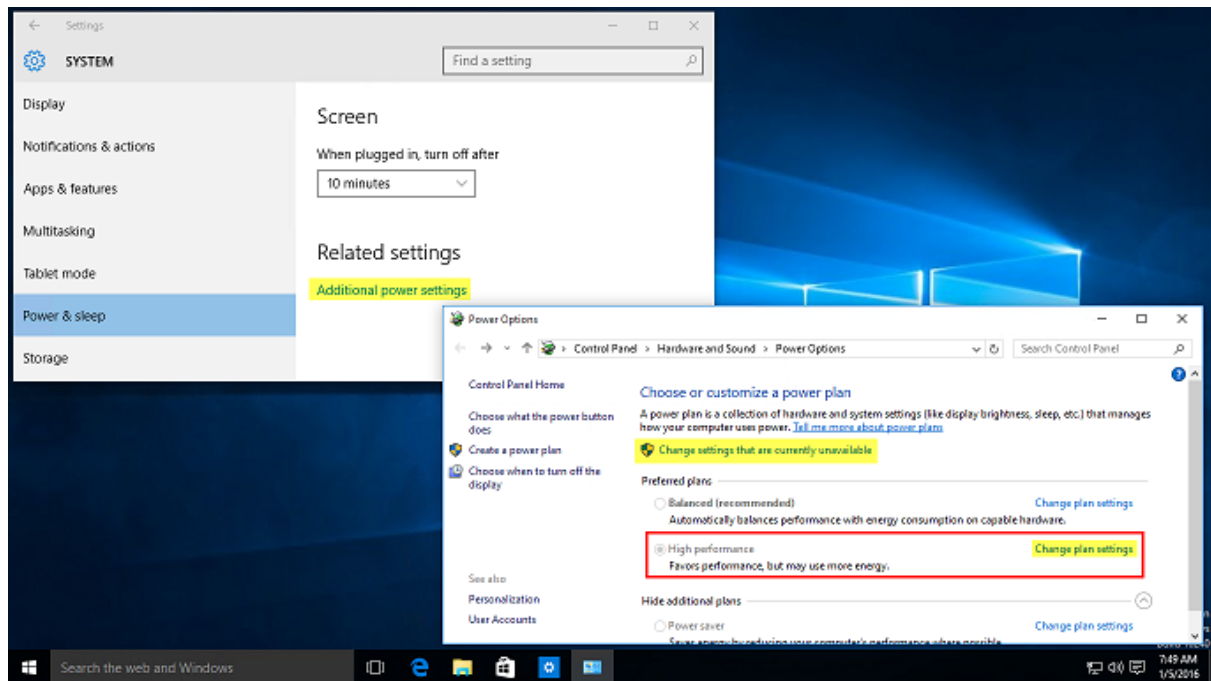
Login to Windows 10 and click the notifications icon at the bottom right. Click **All settings** followed by **System**.



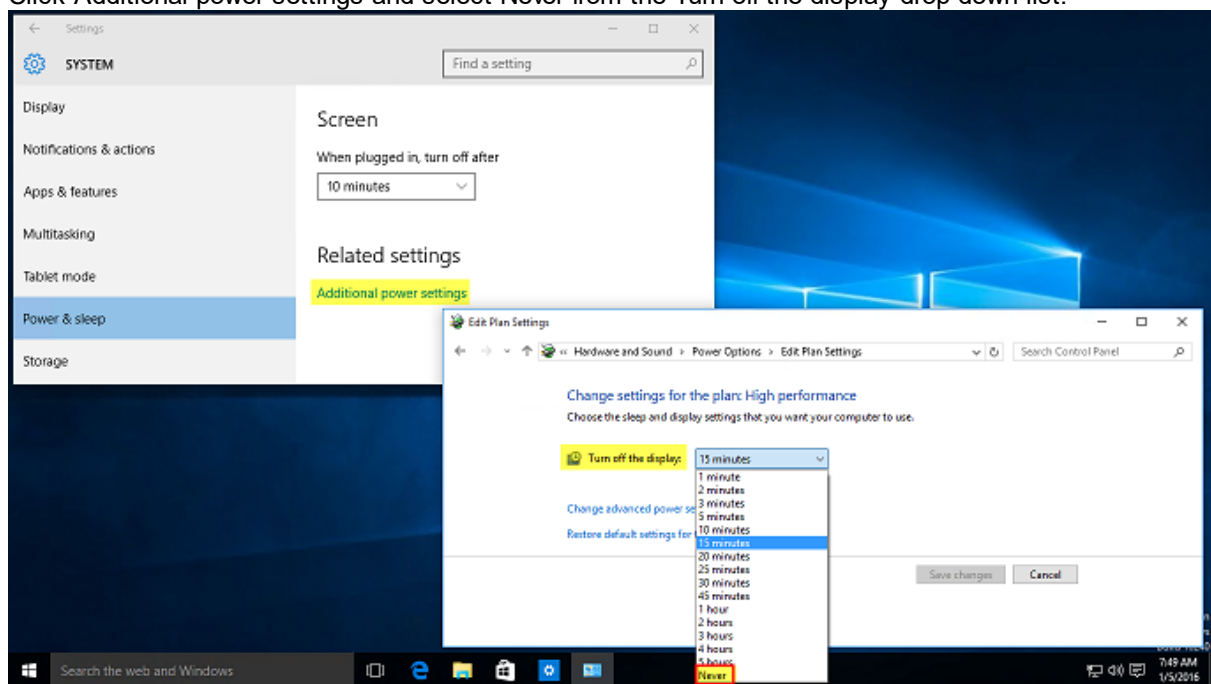
Select Tablet mode and verify that it is set to Off.



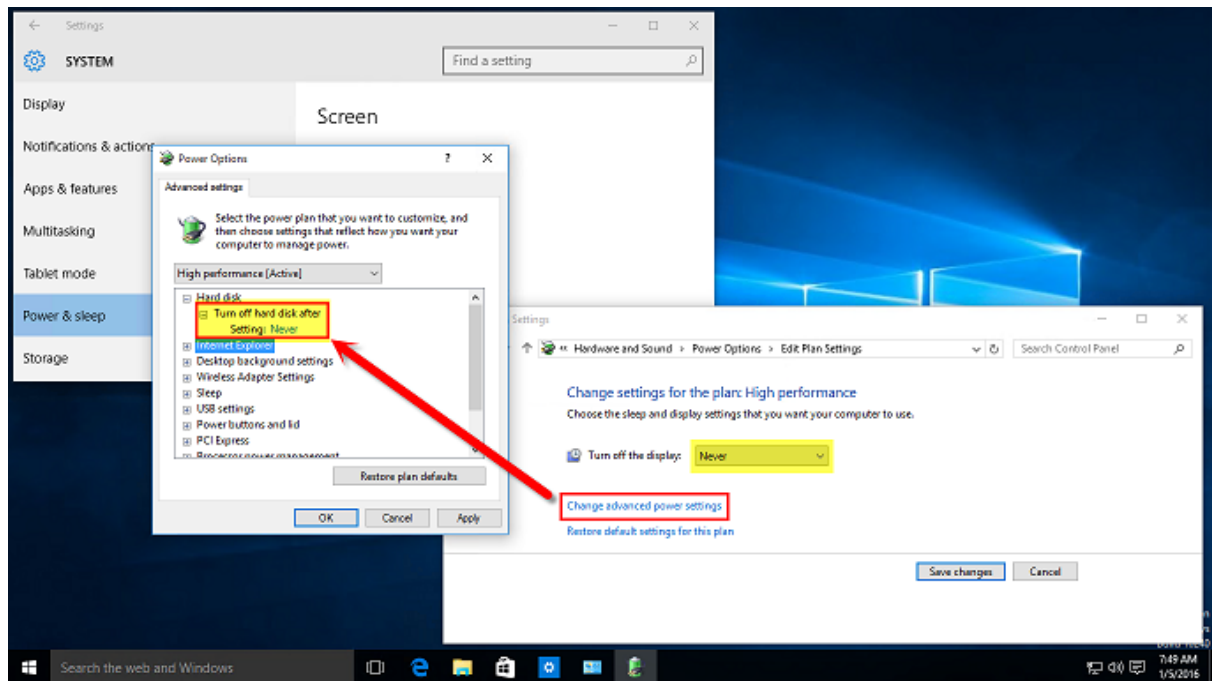
Select Power & sleep and click Additional power settings. Click Change settings that are currently unavailable, select High performance and click Change plan settings.



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



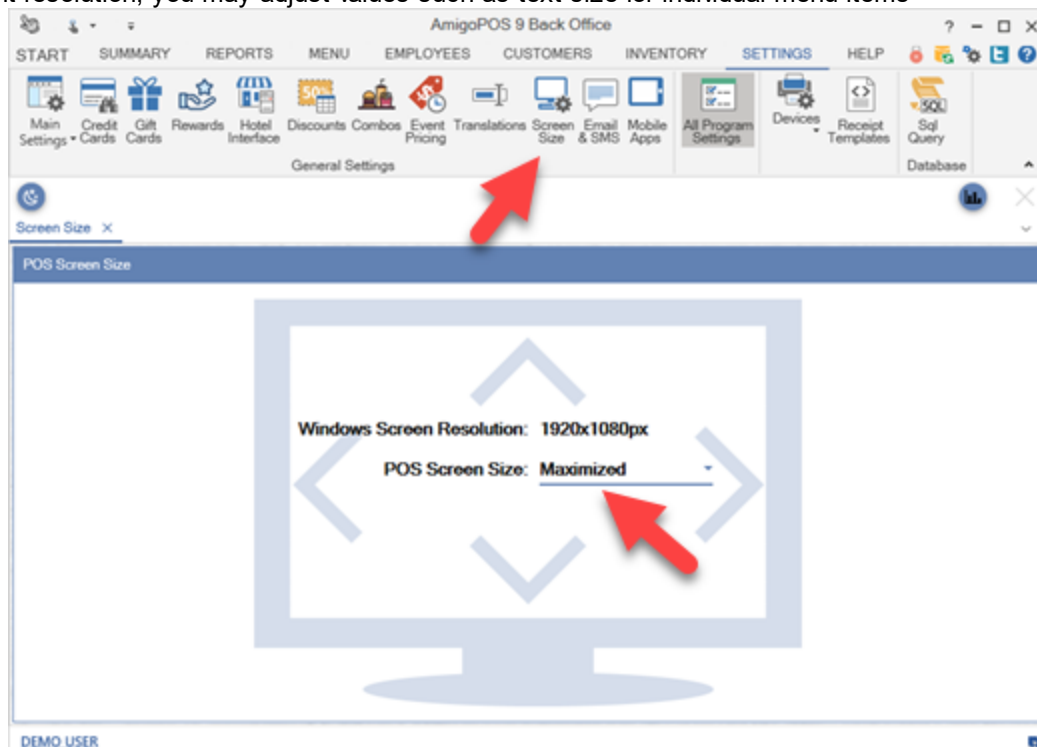
Click Change advanced power settings and set Turn off hard disk after to 0. Click Apply to verify that the 0 has been replaced by Never. Click OK followed by Save changes.



2.14 Screen Resolution

AmigoPOS is capable of resizing to any screen resolution. Select the screen resolution in Back Office | Settings | Screen Size. Note that running a very high screen resolution, i.e. over 1280x768 pixels, will consume more system resources. Most touch screen monitors will perform best at 1024x768 pixels. AmigoPOS must be restarted after the screen resolution is changed.

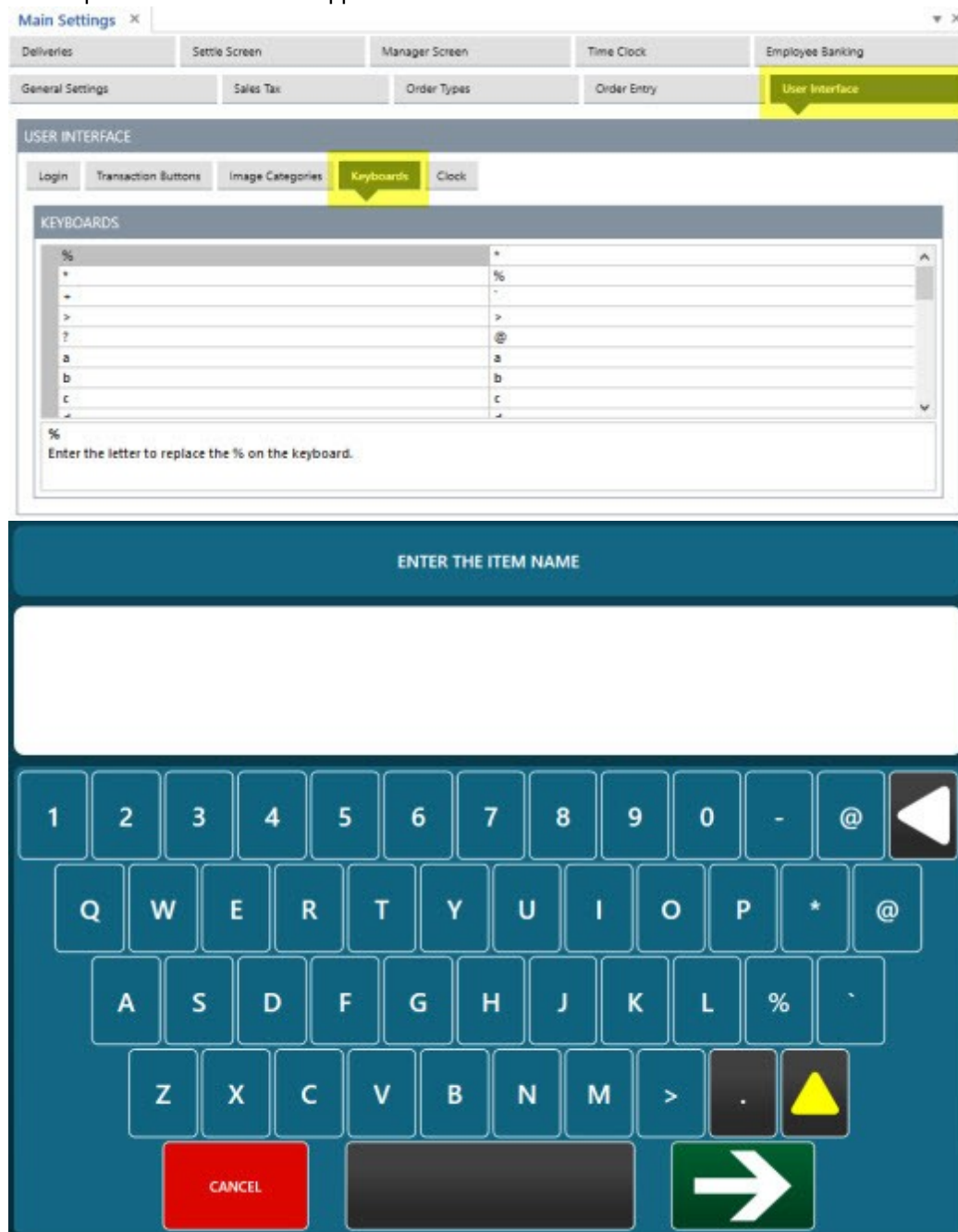
The demonstration database settings and images are optimized for 1024x768 pixels. When using a different resolution, you may adjust values such as text size for individual menu items



2.15 International Users

2.15.1 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.



2.15.2 Foreign Currency

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

Order No 31

Gratuity suggestions	25%	\$3.16
based on order total	20%	\$2.53
less discounts	15%	\$1.90

Foreign Exchange

Pound	£ 12.65	GBP
Baht	฿ 12.65	BHT
Yen	¥ 12.65	YEN

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 Name, Symbol and Abbreviation shown above correspond to column names in the image below.

Settle Screen Settings							
Settle Screen Settings							
Payment Types Currency Shortcuts Foreign Currency Cash Payouts Local Payment Types Cash Discount							
ID	COUNTRY	NAME	SYMBOL	ABBREVIATION	EXCHANGE RATE	ENABLED	PRINT ON RECEIPT
Click here to add a new row							
3	AUSTRALIA	Dollar	\$	AUD	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	CANADA	Dollar	\$	CND	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14	CHINA	Yuan	¥	YUN	1.00	<input type="checkbox"/>	<input type="checkbox"/>
8	EURO ZONE	Eur	€	EUR	1.00	<input type="checkbox"/>	<input type="checkbox"/>
5	FRANCE	Franc	F	FRF	1.00	<input type="checkbox"/>	<input type="checkbox"/>
16	ISRAEL	Sheqel	₪	SHK	1.00	<input type="checkbox"/>	<input type="checkbox"/>
15	JAPAN	Yen	¥	YEN	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
→ 17	KOREA	Won	₩	WON	1.00	<input type="checkbox"/>	<input type="checkbox"/>
18	QATAR	Rial	ر.ق	RIA	1.00	<input type="checkbox"/>	<input type="checkbox"/>
19	SAUDI ARABIA	Ri	ر.س	RIA	1.00	<input type="checkbox"/>	<input type="checkbox"/>
6	SURINAME	Dollar	ƒ	SRD	1.00	<input type="checkbox"/>	<input type="checkbox"/>
13	THAILAND	Baht	฿	BHT	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	UNITED KINGDOM	Pound	£	GBP	1.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1	UNITED STATES	*	\$	USD	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Open the receipt template editor and enter the following lines. Note that only the `<ForeignCurrency />` tag is required and the first line can be modified or omitted.

```
<TextAlign=Center /><TextSize=14 /><TextSemiBold />Foreign Exchange
<ForeignCurrency />
```



```

35 <TextAlign=Center /><TextSize=12 />欢迎再来
36 <Barcode />
37
38 <TextAlign=Center /><TextSize=14 />Order No <OrderNumber />
39
40 <TextSize=11 />Gratuity suggestions<ColumnDoubleWidth /><TextAlign=Right />
41 <TextSize=11 />based on order total<ColumnDoubleWidth /><TextAlign=Right />
42 <TextSize=11 />less discounts<ColumnDoubleWidth /><TextAlign=Right /> 15% <
43
44 <Validate=AgeVerification />AGE VERIFICATION
45 <Validate=AgeVerification /><AgeVerificationMethod />
46
47 <Validate=Void /><TextAlign=Center /><TextSize=22 /><TextSemiBold />Void
48 <TextAlign=Center /><TextSize=14 /><TextSemiBold />Foreign Exchange
49 <ForeignCurrency />
50

```

Gratuity suggestions	25%	\$3.16
based on order total	20%	\$2.53
less discounts	15%	\$1.90

Foreign Exchange		
Pound	£	12.65 GBP
Baht	฿	12.65 BHT
Yen	¥	12.65 YEN

2.15.3 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

1

2

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.

=====	
CUSTOMER COPY	COUNTER
SERVER: DEMO U	
=====	
Hamburger	6.90
رجندبکاب	
French Fries	8.40
فrench فريز	
SUBTOTAL: \$15.30	
=====	
PAY THIS AMOUNT: \$16.68	

=====	
CUSTOMER COPY	COUNTER
SERVER: DEMO U	
=====	
French Fries	2.25
Τηρανιτες πατάτες	
Hamburger (2 @1.75)	3.50
Χαμλουριερ	
SUBTOTAL: \$5.75	
=====	
PAY THIS AMOUNT: \$6.27	



Chinese



Greek



Arabic

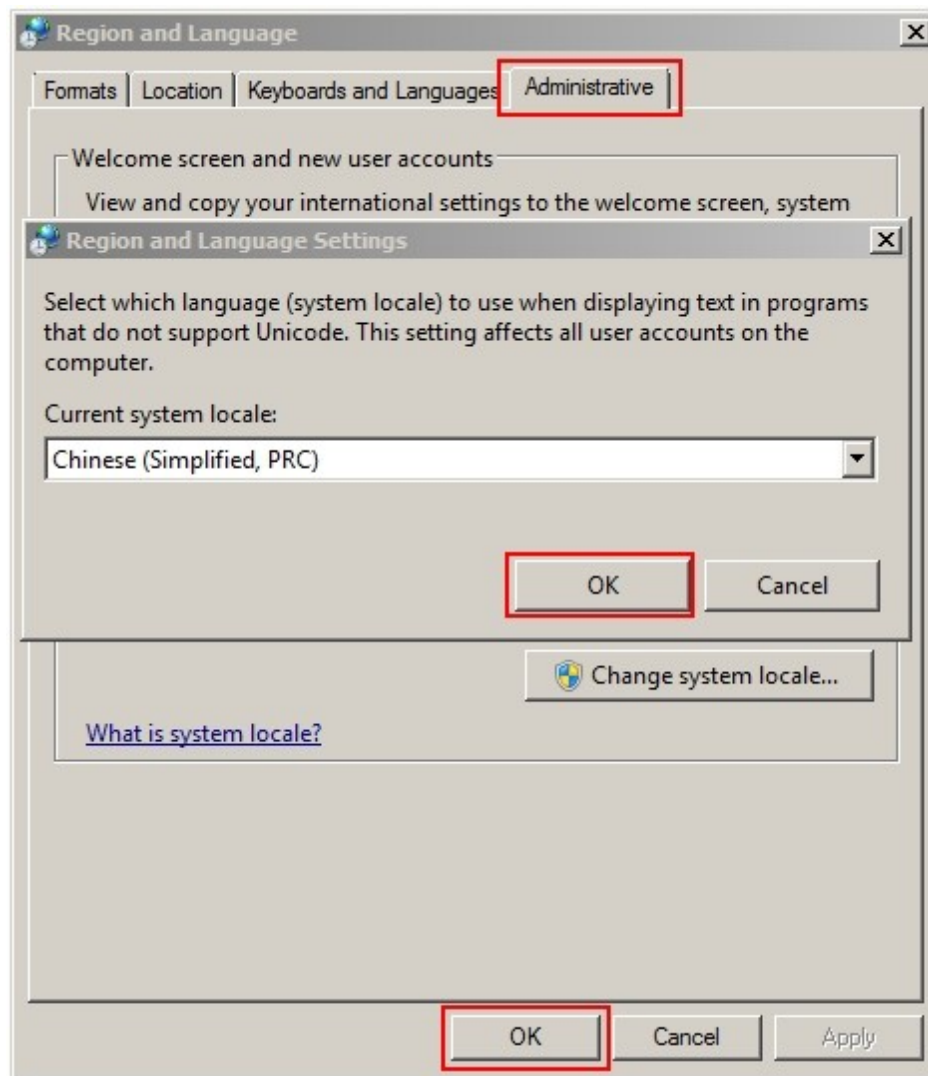
2.15.4 Chinese Language Example

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.

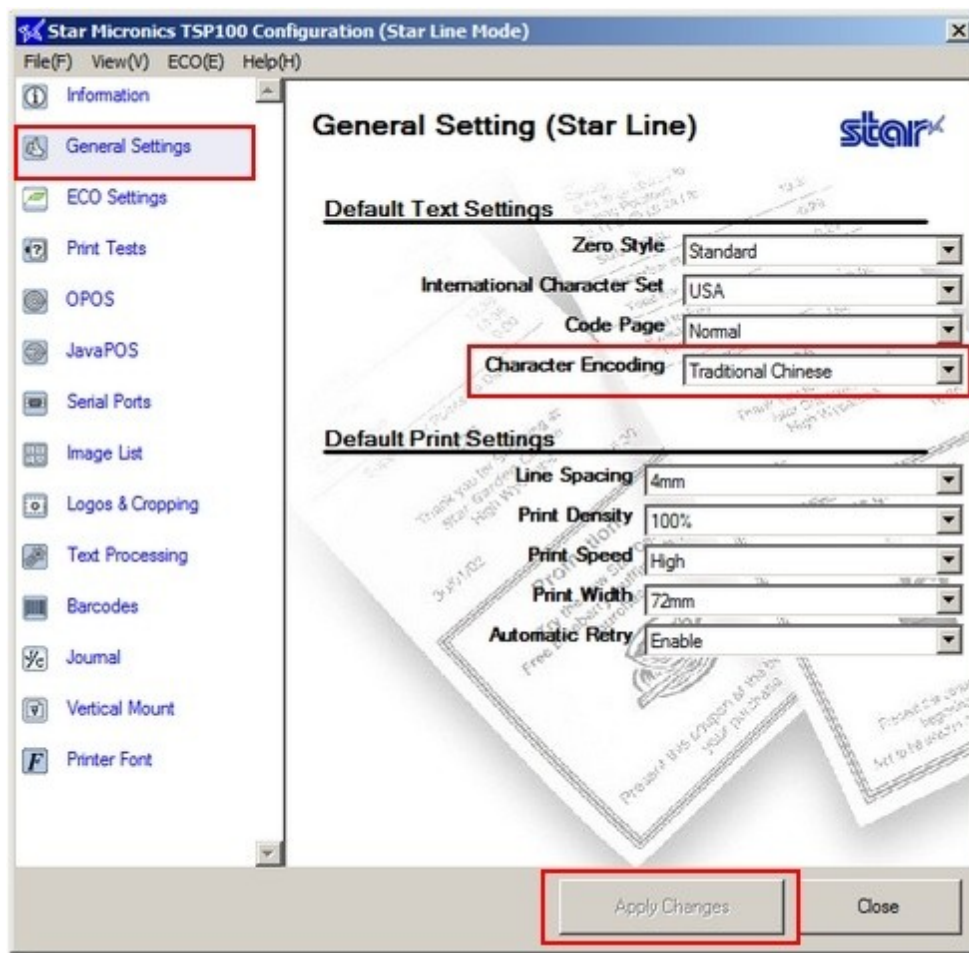
Note that many printers do not contain internal Chinese characters by default and must be special ordered. AmigoPOS uses internal printer fonts to achieve maximum printing speed and quality, in contrast to many other pos applications that use Windows drivers to print Chinese characters, resulting in 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.

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.

**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.



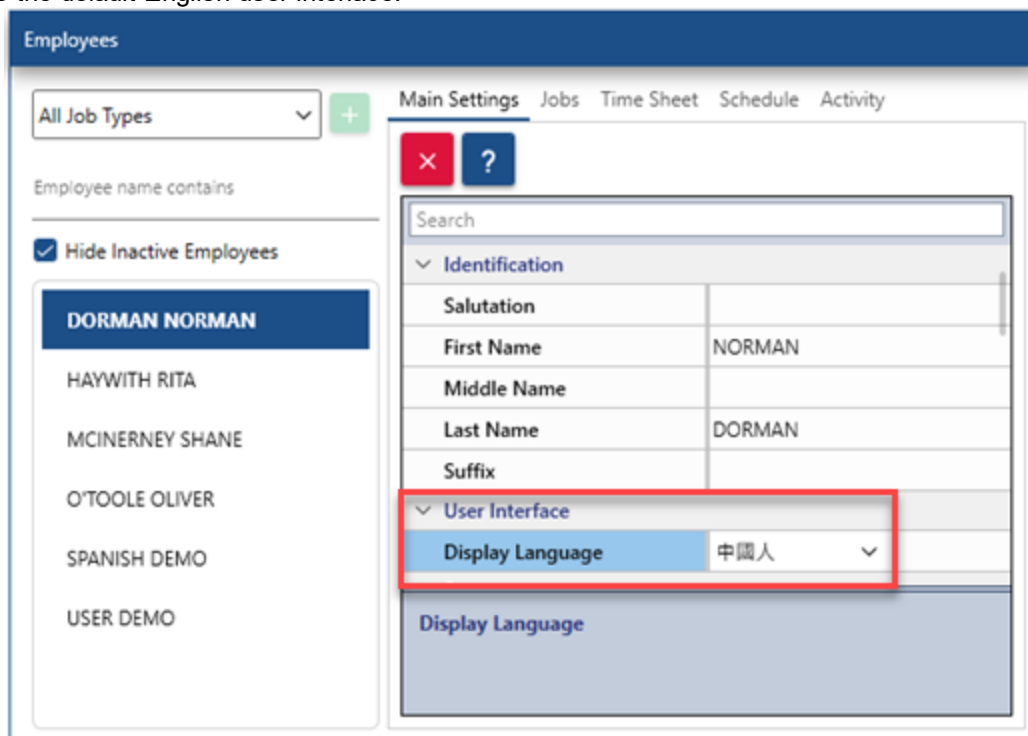
Configure AmigoPOS to use Chinese characters

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.

Translations			
Default Back Office Language		CHINESE	▼
Selected Language		CHINESE	▼
		All Translations <input type="checkbox"/> Missing Translations <input type="checkbox"/>	
		Auto-Fill	
Screen ID	ENGLISH TEXT	CHINESE TEXT	
Backoffice	Business Address	业务地址	
Backoffice	Business Address Line 2	业务地址行 2	
Backoffice	Business address line 2 to appear on	业务地址行 2 显示在报表	
Backoffice	Business address to appear on report	要显示在报表的业务地址	
Backoffice	Business City	商业城市	
Backoffice	Business city to appear on reports	商业城市, 显示在报表	
Backoffice	Business Day Log	业务一天日志	
Backoffice	Business Day Start	业务一天开始	
Backoffice	Business Fax	商务传真	

Assign Employee Language

Open the employee editor in back office | employees and assign the language to each employee that will not use the default English user interface.



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.



Age Verification

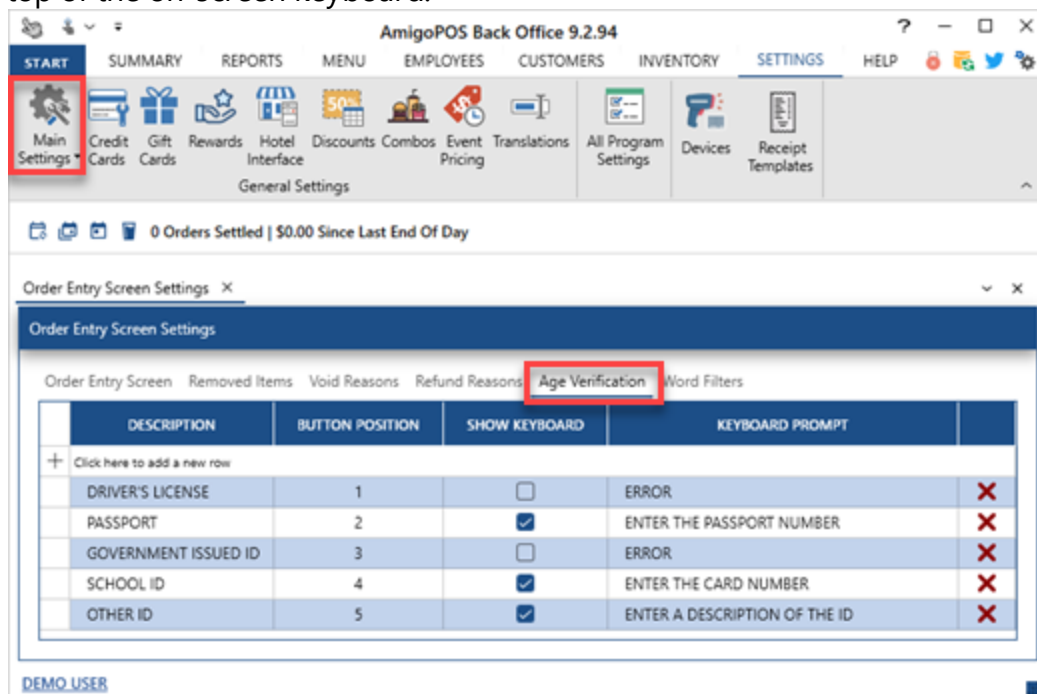
3 Age Verification

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 Screen**, 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.

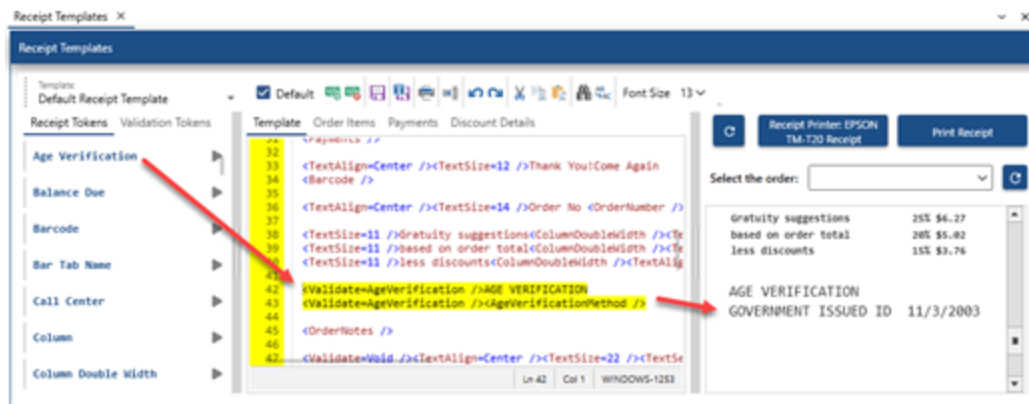
- **Age Verification Method:** The name that is displayed on the screen and printed at the bottom of the customer receipt.
- **Button Position:** Set the button position so that the most commonly used verification methods appear at the top of the list.
- **Show Keyboard:** Check the box if additional 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.



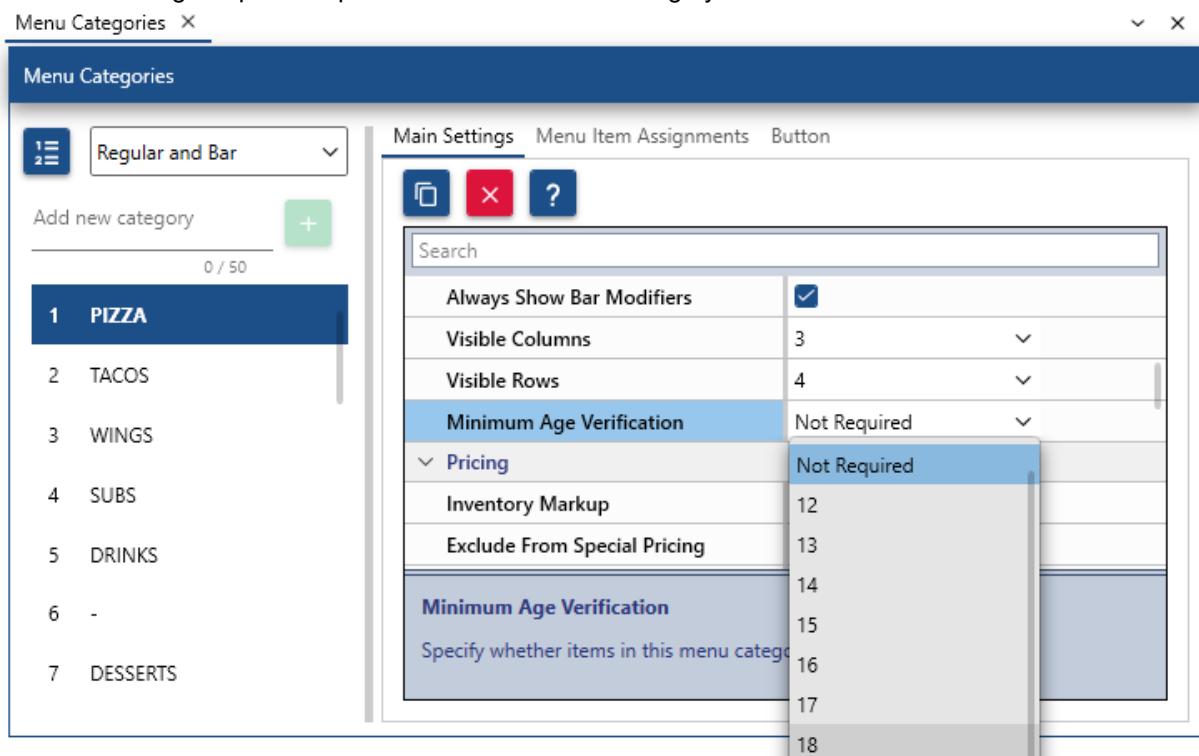
In **Back Office | Settings | Receipt Templates**, add the following tokens and text to the receipt template in order to display the age verification method on the customer receipt. Note that additional tokens can be added for text formatting and alignment.

<Validate=AgeVerification /> AGE VERIFICATION

<Validate=AgeVerification /><AgeVerificationMethod />



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.



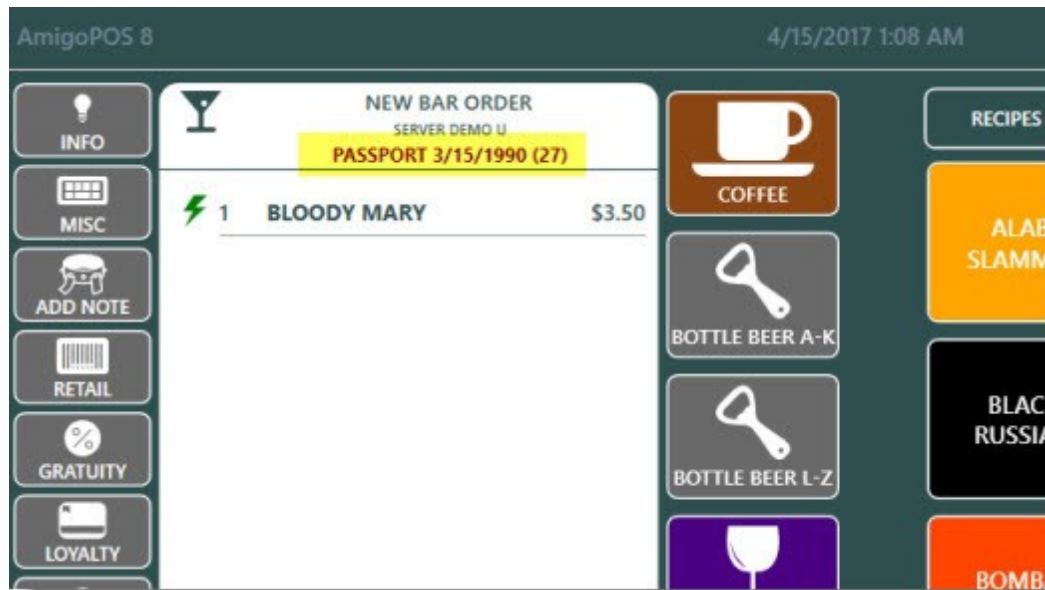
When the menu category is selected, the user is prompted to select the identification method and birthday.

The continue button remains disabled until the identification method and a valid birthday is selected.

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.



Call Center

4 Call Center

4.1 Overview

The AmigoPOS Call Center service consists of 4 components to facilitate communication between the call center and the store:

- **Call Center User Interface**
The call center application is used to enter orders and process credit card payments at the call center. All computers connect to the same instance of SQL Server Express.
- **Call Center Client**
The call center client runs at the call center server and is used to send orders and outgoing store messages to the cloud service and to download each store's menu, store settings and incoming store messages from the cloud service.
- **Data Service**
The Data Service application runs at the main pos station at each store and is used to upload the store's menu, settings and outgoing messages to the cloud service and to receive orders and incoming store message from the cloud service.
- **Pos User Interface**
The point of sale application runs at each computer and is used to recall and modify call center orders and to send messages to the call center cloud service.

4.2 Call Center Server

Before configuring the call center server, network all call center computers using a Windows HomeGroup so that all computers are visible on the local network.

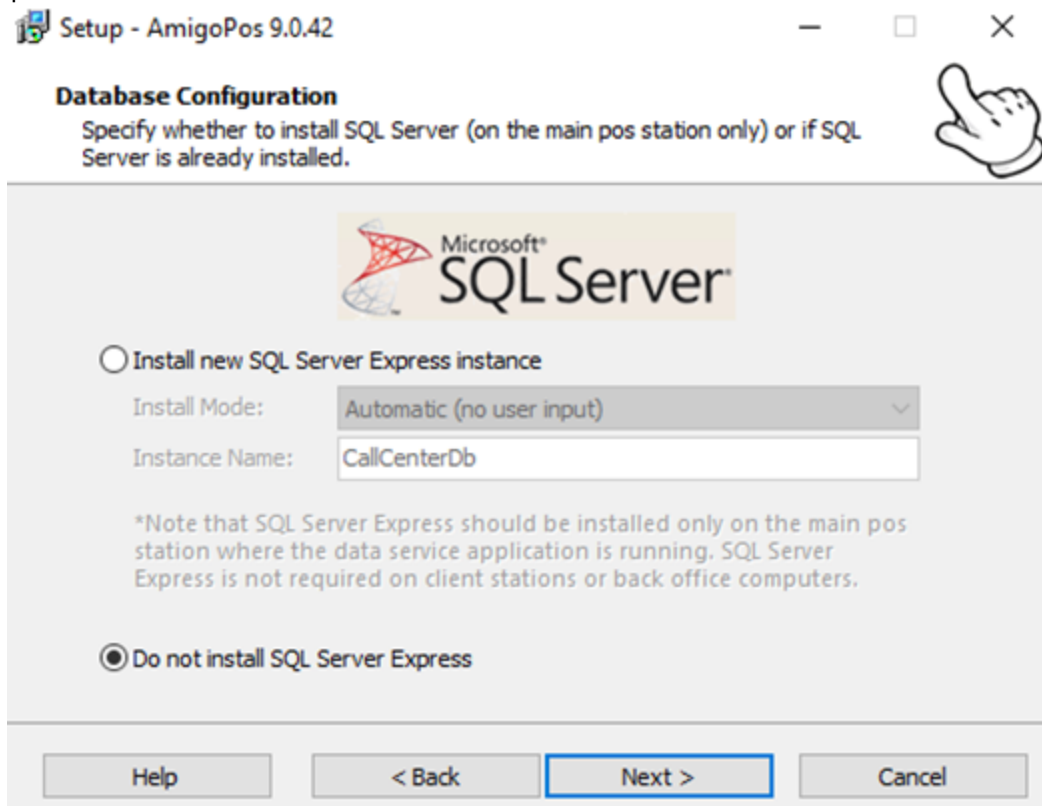
Server

Select a call center computer to act as the server. For best performance, an Intel i3 processor (or equivalent AMD) is recommended. Although wireless networking can be used where Ethernet is not possible, for best performance and reliability, the server should be connected to the network router using an Ethernet cable.

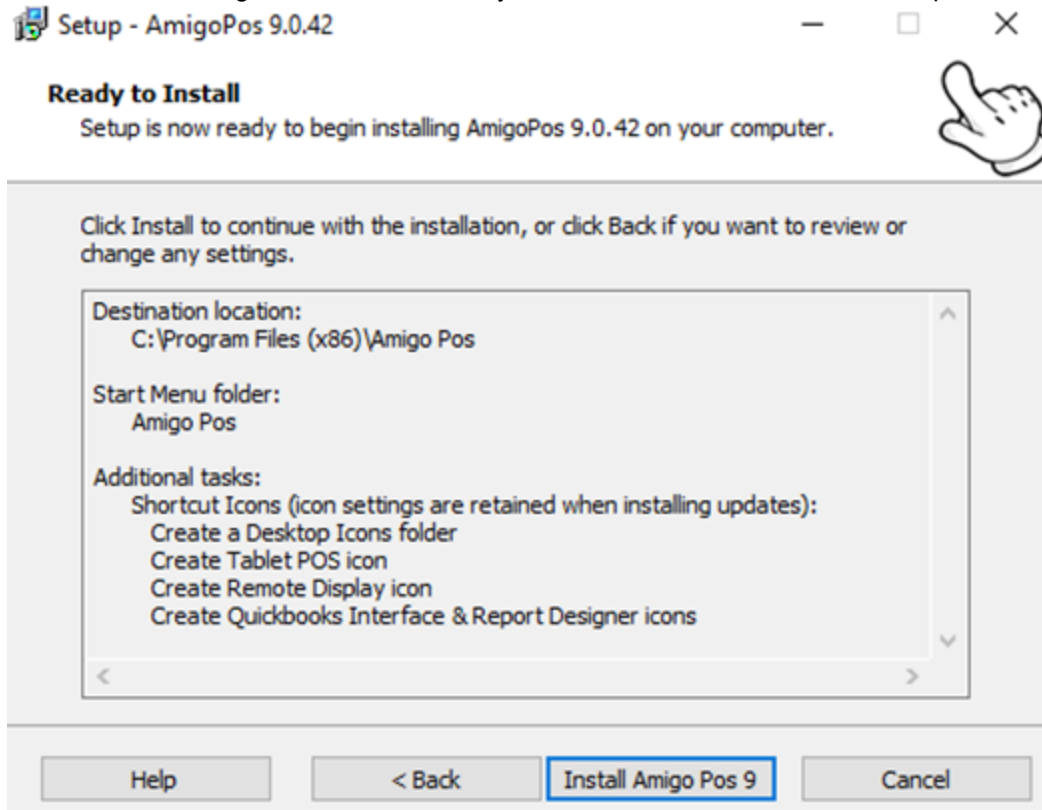
Download the current AmigoPOS installer from <https://amigopos.com/Download/Version9> and run the installer on the server.



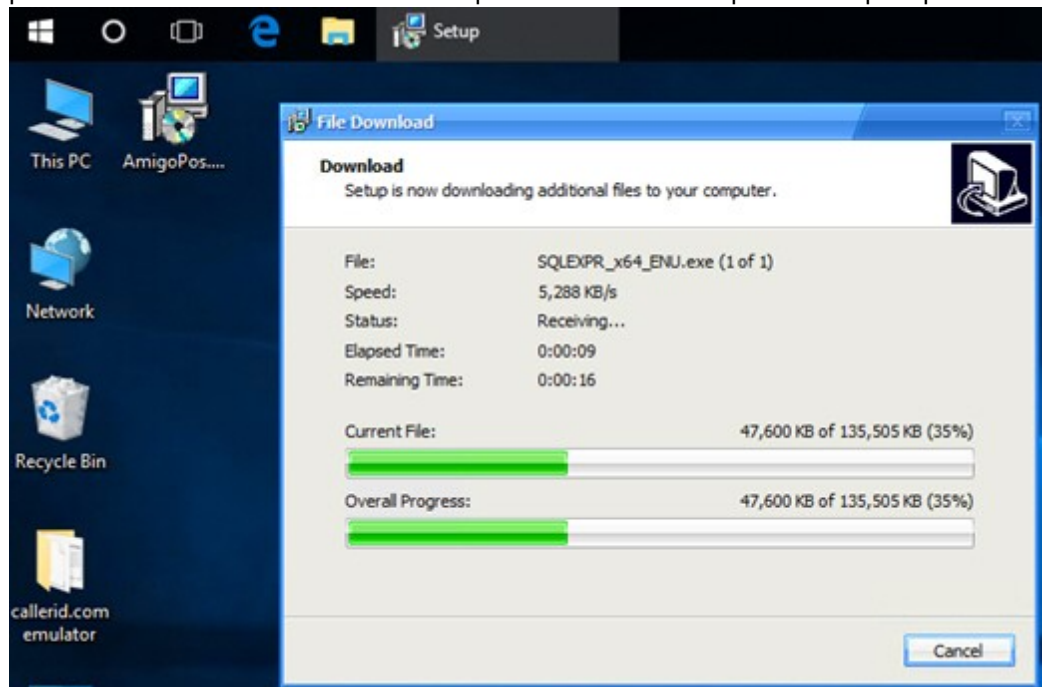
Run the installer and click Next on the welcome screen. Create a new database instance and enter a secure password.



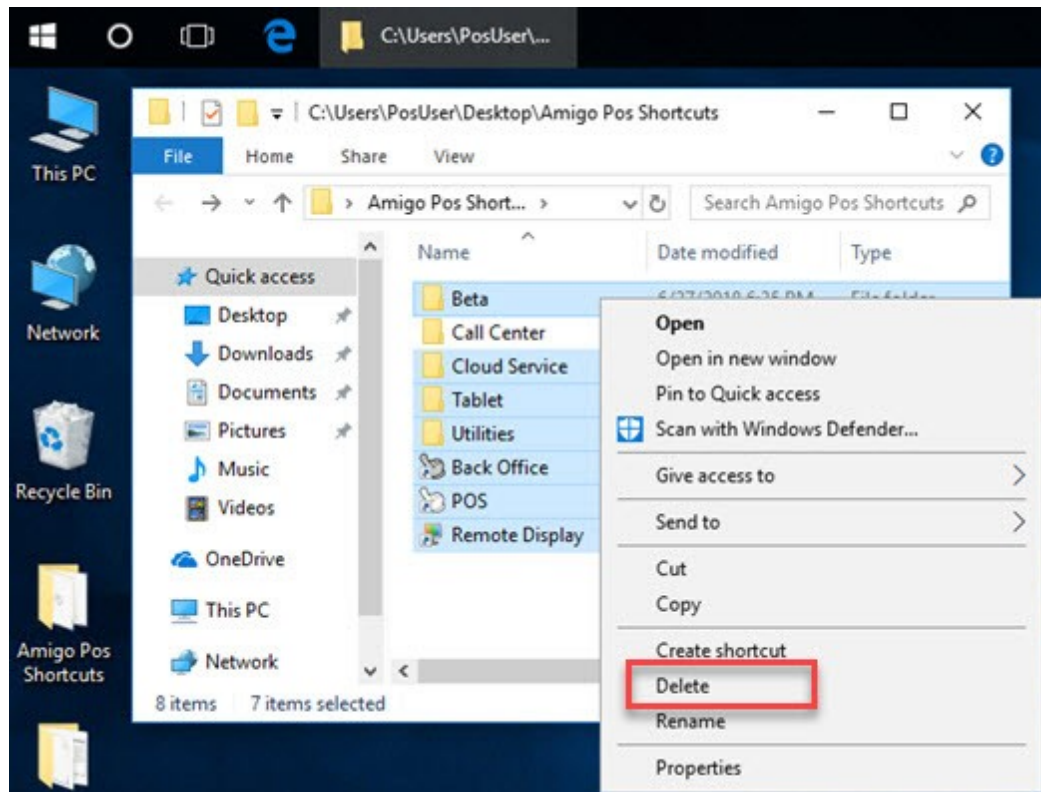
Click Next on the ensuing screens and do not check the box to start AmigoPOS automatically with Windows. Click Install AmigoPOS to automatically download and install SQL Server Express.



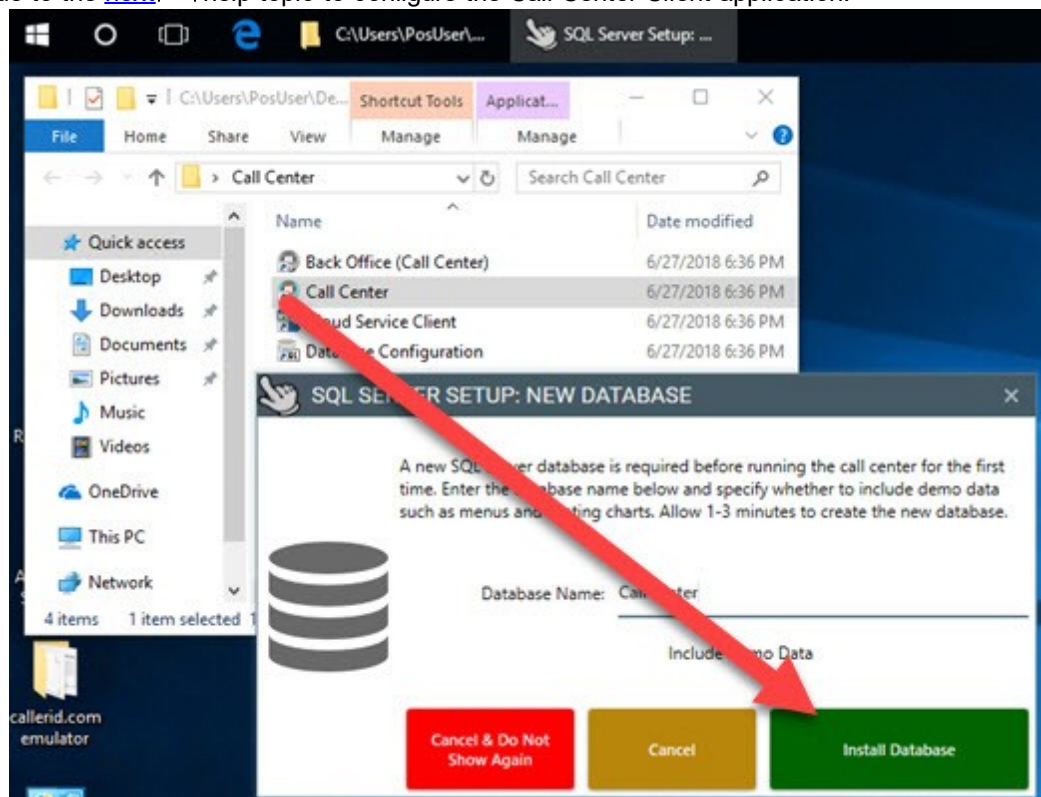
Allow up to 5 minutes for the installation to complete. Reboot the computer when prompted.



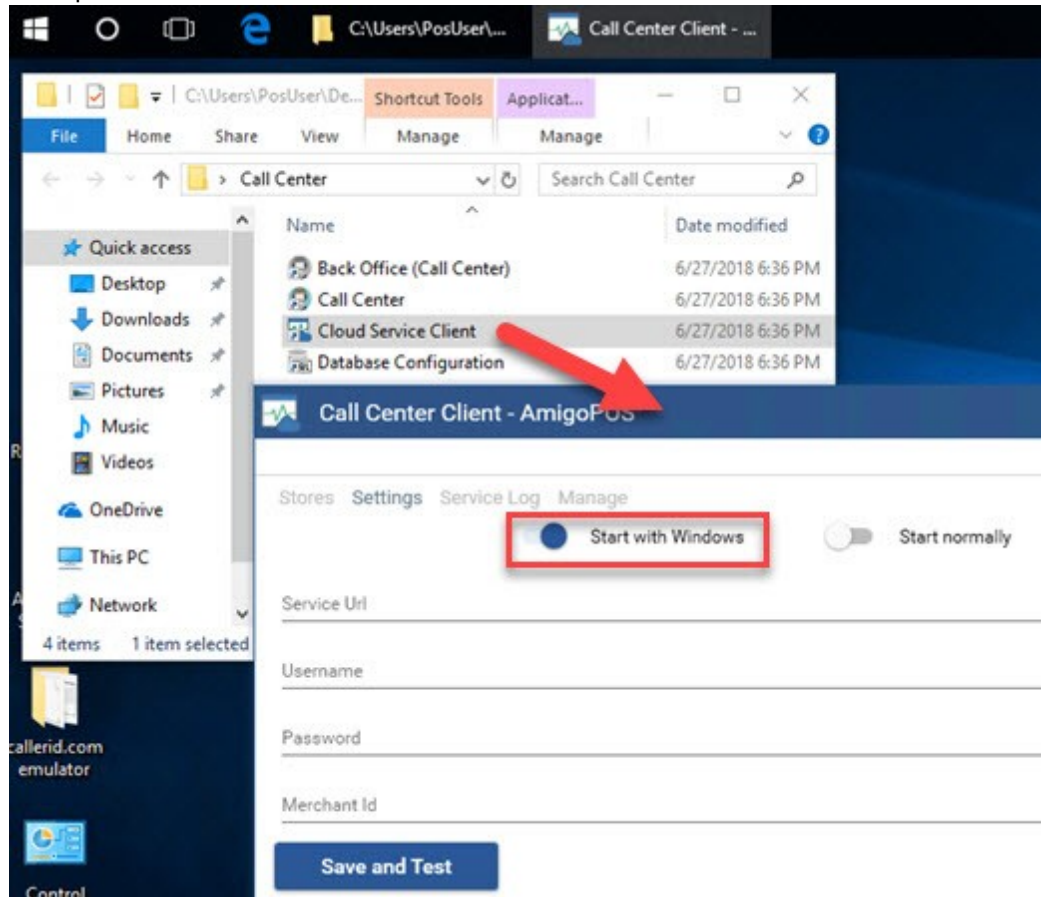
Open the desktop shortcuts folder and delete all folders except for the Call Center folder, which can be moved to e desktop for easy access.



Run the Call Center shortcut from the desktop shortcuts folder. The application will prompt the user to create a new database the first time it is run. Enter a database name and click Install Database. The call center application will start automatically after the database is created. Shut down the application and continue to the [next](#) ⁷⁴ help topic to configure the Call Center Client application.



Run the Cloud Service Client application from the desktop shortcuts folder. Enter the service credentials as shown in the [subscription](#)⁷⁸ confirmation email, set the application to start automatically with Windows and click **Save and Test** to verify connectivity with the call center cloud service. The server setup is complete.



4.3 Call Center Client

The call center client application runs on the same computer as the database server and is used to send orders and outgoing store messages to the cloud service and to download each store's menu, store settings and incoming store messages from the cloud service. The call center client application must be running in order to use the call center user interface.

Note: For best performance, the call center client application must run on the same computer as SQL Server Express

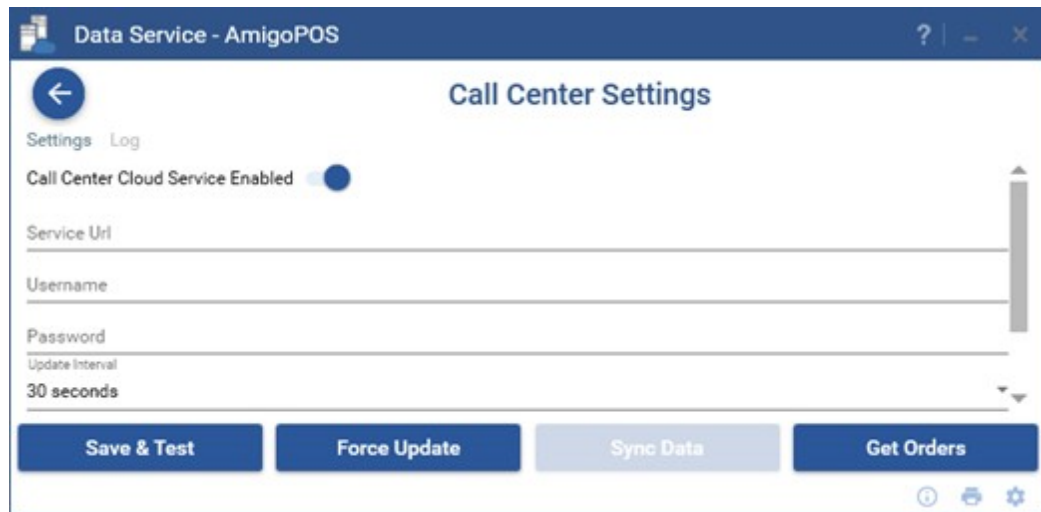
Run the application from the desktop shortcuts folder and click the Settings tab. Referring to the cloud service subscription confirmation email, enter the credentials and click **Save and Test** to verify connectivity with the call center cloud service.

Enable both the **Start with Windows** and **Start minimized** settings at the top to automatically start the application minimized to the system taskbar when logging in to Windows.

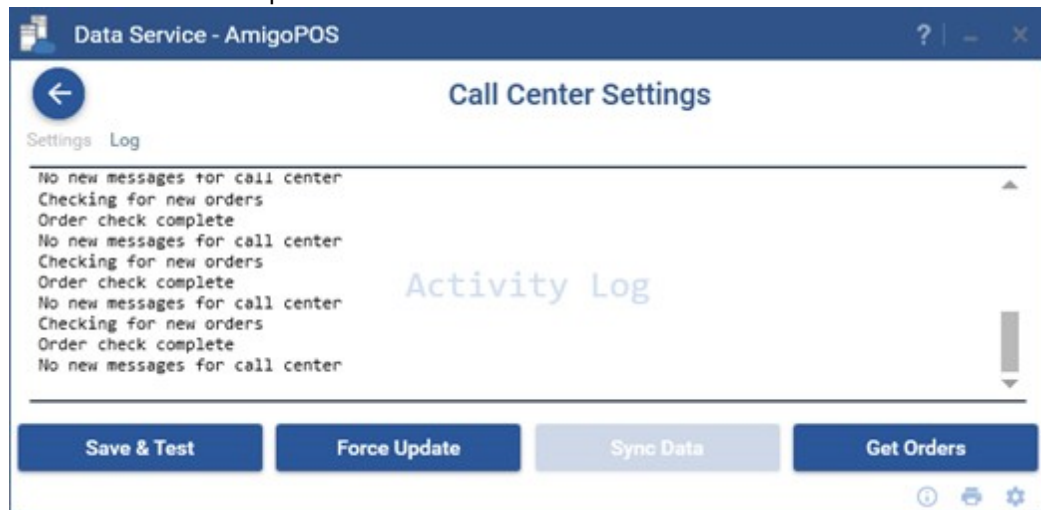
4.4 Pos Data Service

The AmigoPOS Data Service application runs at the main pos station where SQL Server Express is installed and is used to receive orders and messages from the call center cloud service and to upload the menu and send store messages to the call center cloud service. Run the application from the desktop shortcut and click the gear icon at the bottom right. Referring to the cloud service subscription confirmation email, enter the credentials and click **Save Settings**. Enable both the **Start with Windows** and **Start minimized** settings at the top to automatically start the application minimized to the system taskbar when logging in to Windows.

Return to the main screen and click the Call Center settings button. Referring to the cloud service subscription confirmation email, enter the credentials and click **Save and Test** to verify connectivity with the call center cloud service.

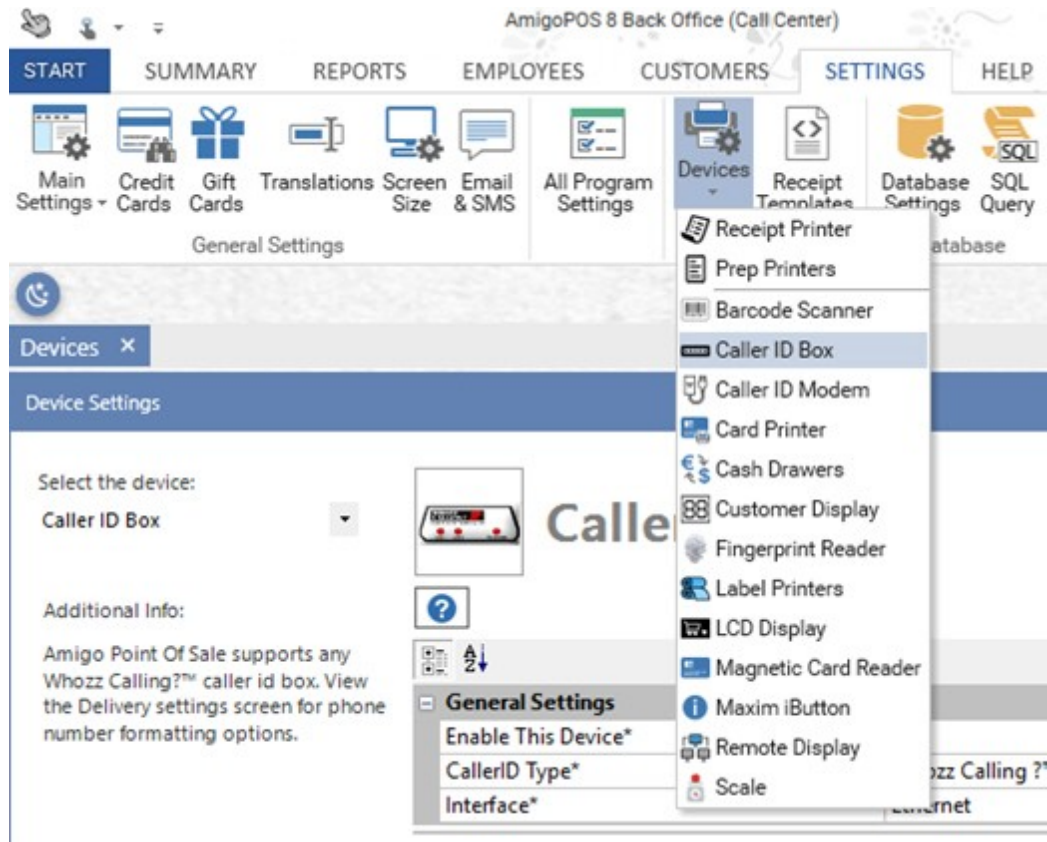


Click the **Force Update** to upload the menu and store settings to the cloud service. Allow a few minutes for the call center to download the data and enter an order at the call center and open the service log to verify that it is received at the pos within 30 seconds.



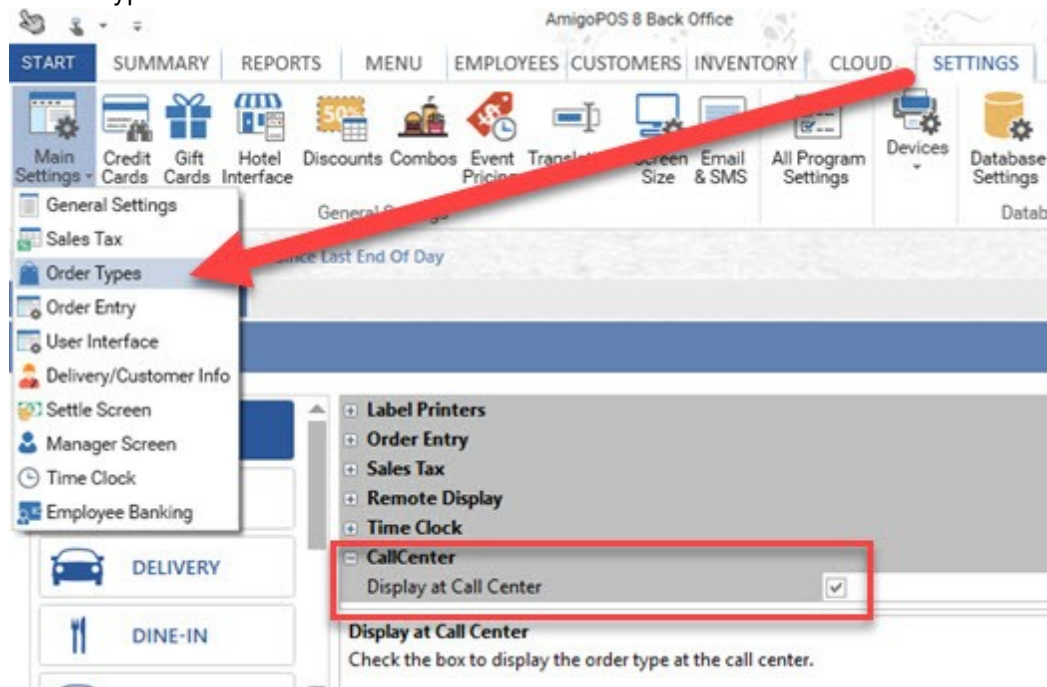
4.5 Call Center Caller Id

The caller center application is compatible with the pos caller id boxes available from callerid.com. Set up the box in Back Office | Settings | Devices as described in the [Caller Id Box](#)^[310] help topic. The call center application is also compatible with the 3CX PBX and can be configured as described at the [3CX PBX](#)^[304] help topic.



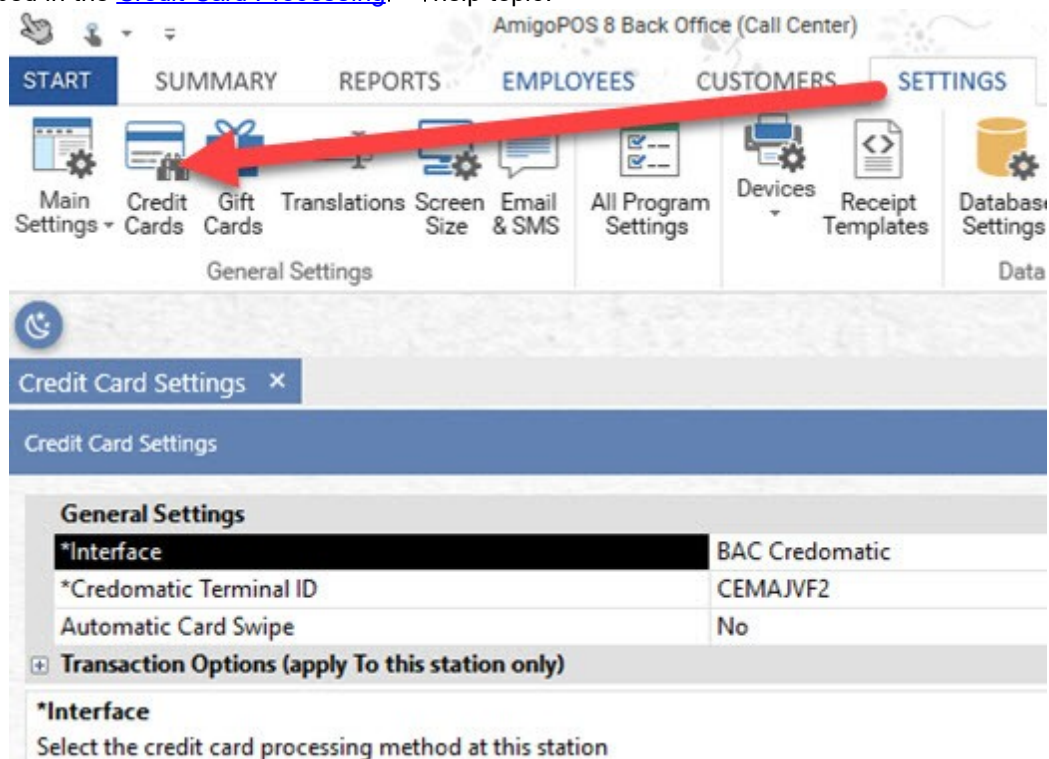
4.6 Call Center Order Types

Open back office | settings | main settings | order types at each store and enable the order type(s) that will appear at the call center when this store is selected on the customer information screen. Enable at least one order type at each store.





4.7 Call Center Credit Cards


The call center application supports integrated credit card processing using Datacap NETePay and BAC Credomatic. In addition, transactions can be entered manually if the payment processor is offline or voice authorization is used. Configure credit card processing in back office | settings | credit cards as described in the [Credit Card Processing](#) help topic.



4.8 Call Center Subscription

Complete the signup form at <https://www.amigopos.com/CloudServices> to obtain a trial subscription and login credentials for the call center cloud service.


Restaurant Point Of Sale



[FEATURES +](#)
[DOWNLOAD](#)
[CONTACT +](#)
[SUPPORT +](#)
[CLOUD SERVICES](#)
[PURCHASE +](#)
[COMING SOON](#)

AmigoPOS Cloud Service Registration

All fields are required. Please allow 24 hours to set up your account.

Services

Online Ordering Service
 Includes a free no-obligation 90 day trial. Subscription pricing will be released shortly with an estimated monthly cost of \$50 per store.

☐

Call Center Service
 Includes a free no-obligation 90 day trial. Subscription pricing will be released shortly with an estimated average monthly cost of \$60 USD per call center operator.

☐

Gift Card Service
 Includes a free no-obligation 90 day trial. Subscription pricing will be released shortly with an estimated monthly cost of \$25 per store.

☐

Enterprise Data Service
 Currently in private beta testing with expected release date July 2019. Subscription pricing will be released shortly with an estimated monthly cost of \$30 per store.

☐

Cash Payouts

5 Cash Payouts

Paid Out Reasons

The **Paid Out Reasons** tab in Back Office | Settings | Main Settings | Settle Screen contains the list of paid out reasons that appears on the drop-down list on the Paid Out screen.

Settle Screen Settings		
Payment Methods Payment Types Old Customer Receipt Currency Shortcuts Foreign Currency <u>Cash Payouts</u> Local Pay < >		
Payout Reasons 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	✗

Payout Recipients

The Payout Recipients tab in Back Office | Settings | Main Settings | Settle Screen contains the list of paid out recipients that appears on the drop-down list on the Paid Out screen.

Settle Screen Settings		
Payment Methods Payment Types Old Customer Receipt Currency Shortcuts Foreign Currency <u>Cash Payouts</u> Local Pay < >		
Payout Reasons <u>Recipients</u>		
RECIPIENT	BUTTON POSITION	
+ Click here to add a new row		
MISC	1	✗
BAKERY	3	✗
EXTERMINATOR	4	✗
UNLISTED	5	✗
CUSTOMER	6	✗
EMPLOYEE	7	✗
GROCERY STORE	8	✗

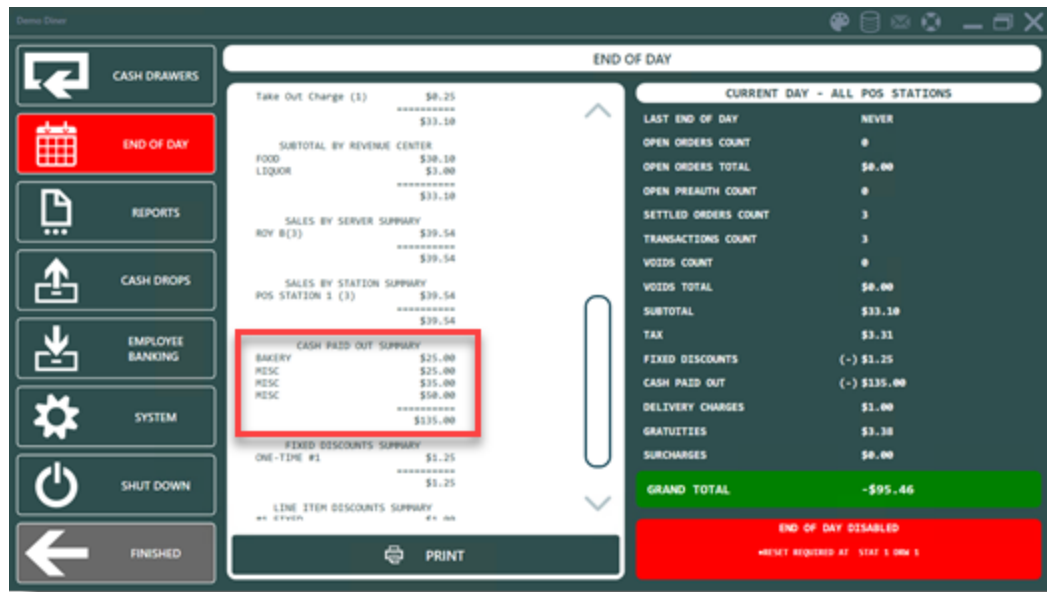
Usage

Login and press the PAYOUT button at the right. Select the reason, recipient and enter the amount. A note can be added at the top. Press the green continue button to save the transaction and open the cash drawer.

Manager Screen

Cash payouts are tracked both on the drawer reset report and the end of day report.

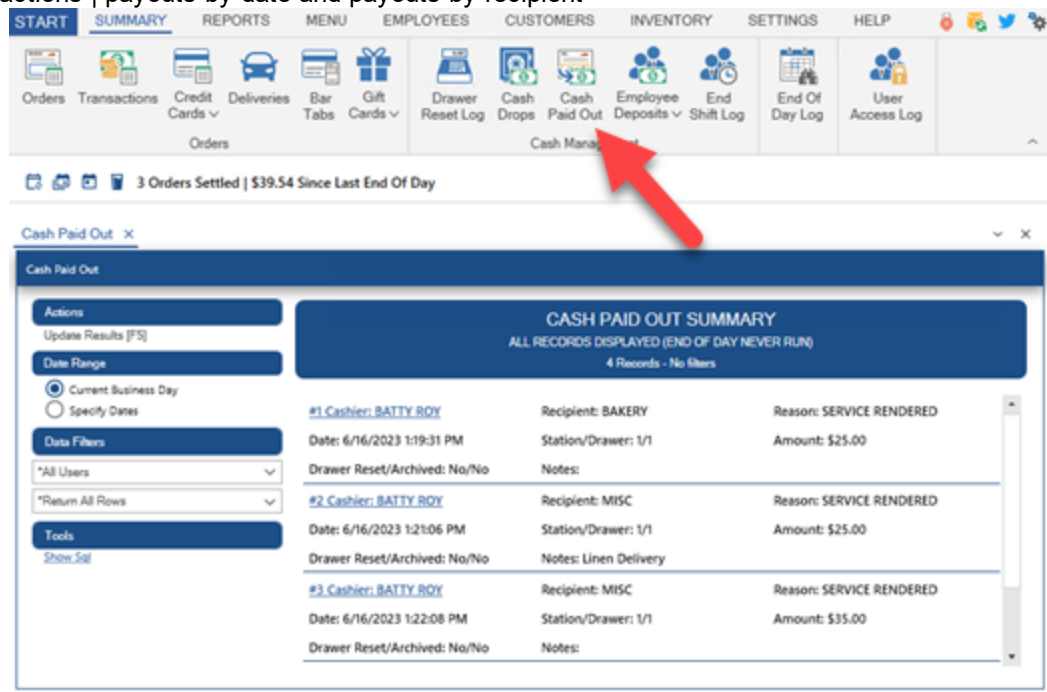
Drawer Reset Report



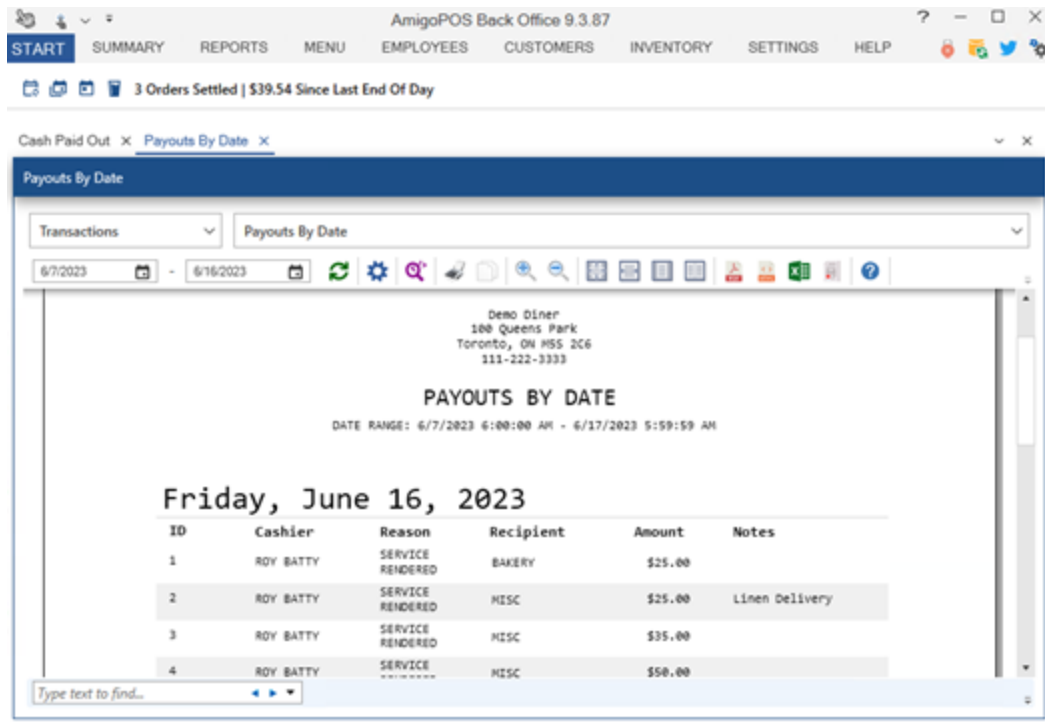
End of Day Report

Back Office

Cash payouts can be viewed in back office | summary | cash paid out and back office | reports | transactions | payouts by date and payouts by recipient



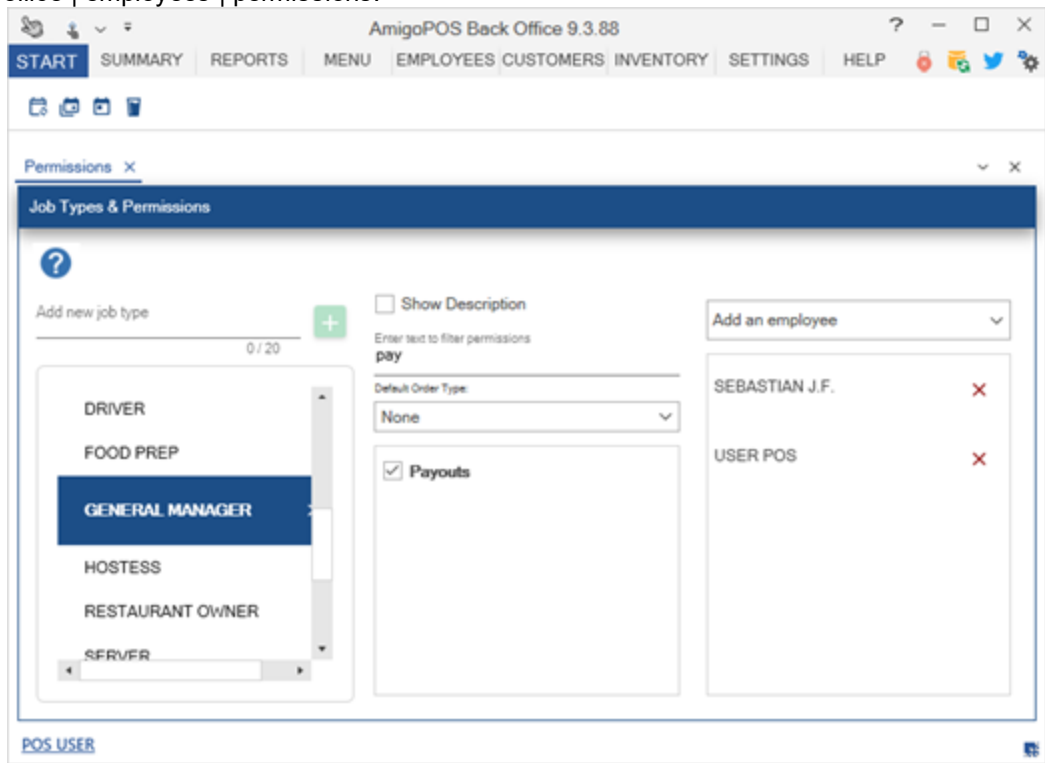
Cash Paid Out Summary



Cash Paid Out Report

Permissions

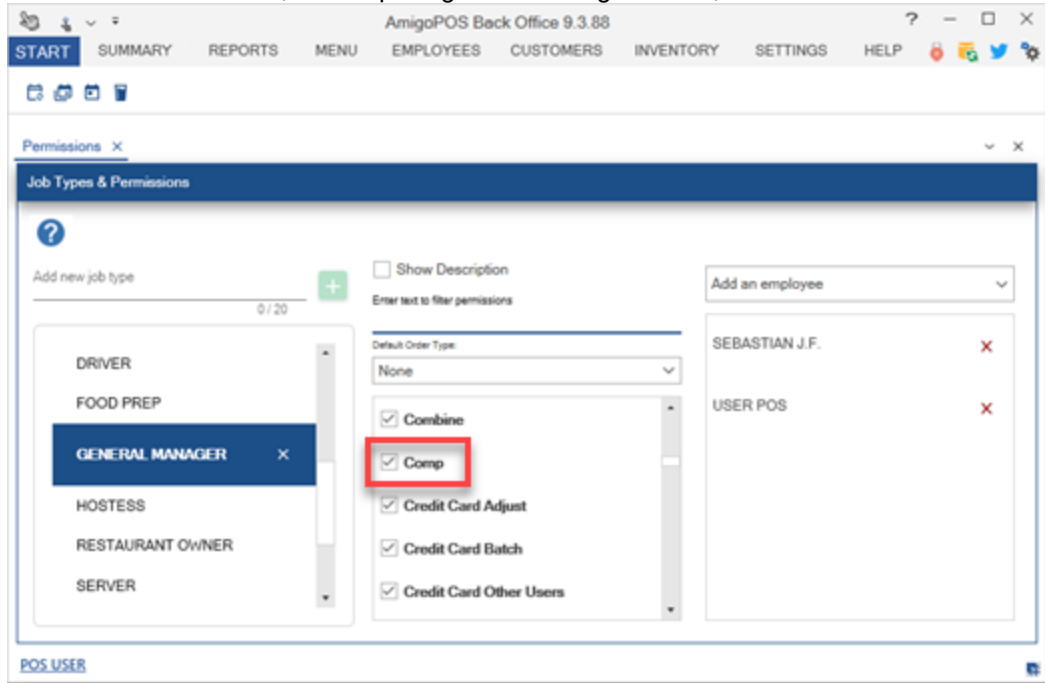
Employees can be prevented from accessing the payout screen by disabling the Payouts permissions in back office | employees | permissions.



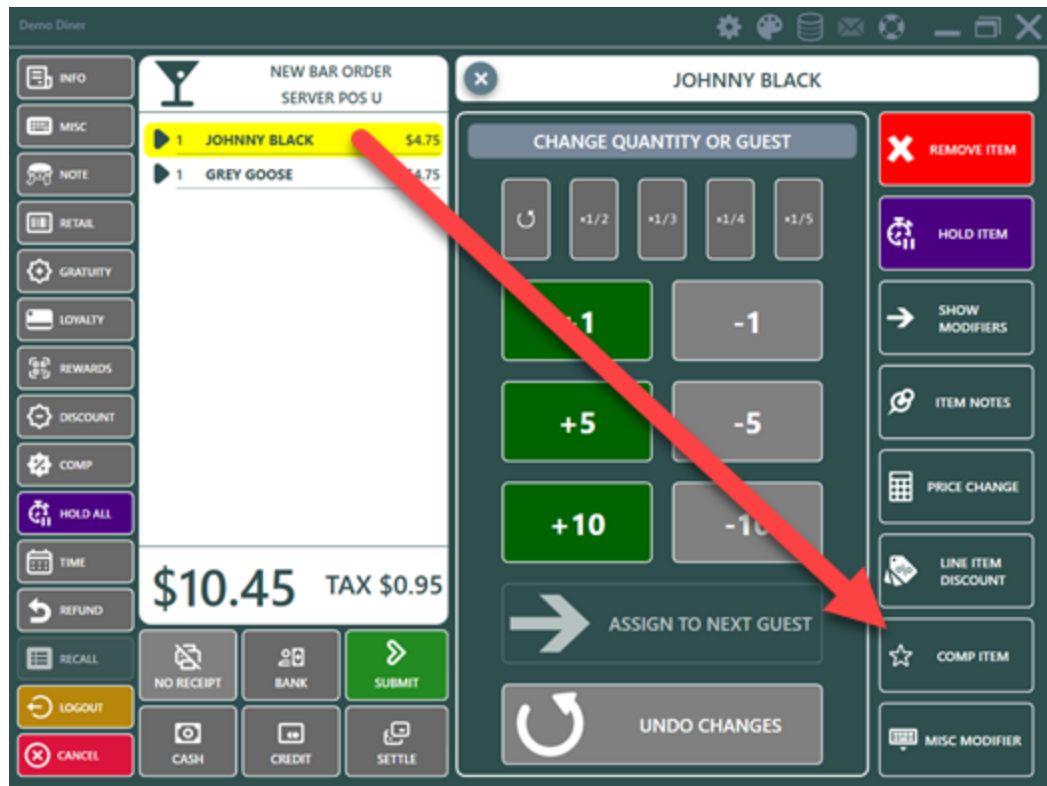
Comps

6 Comps

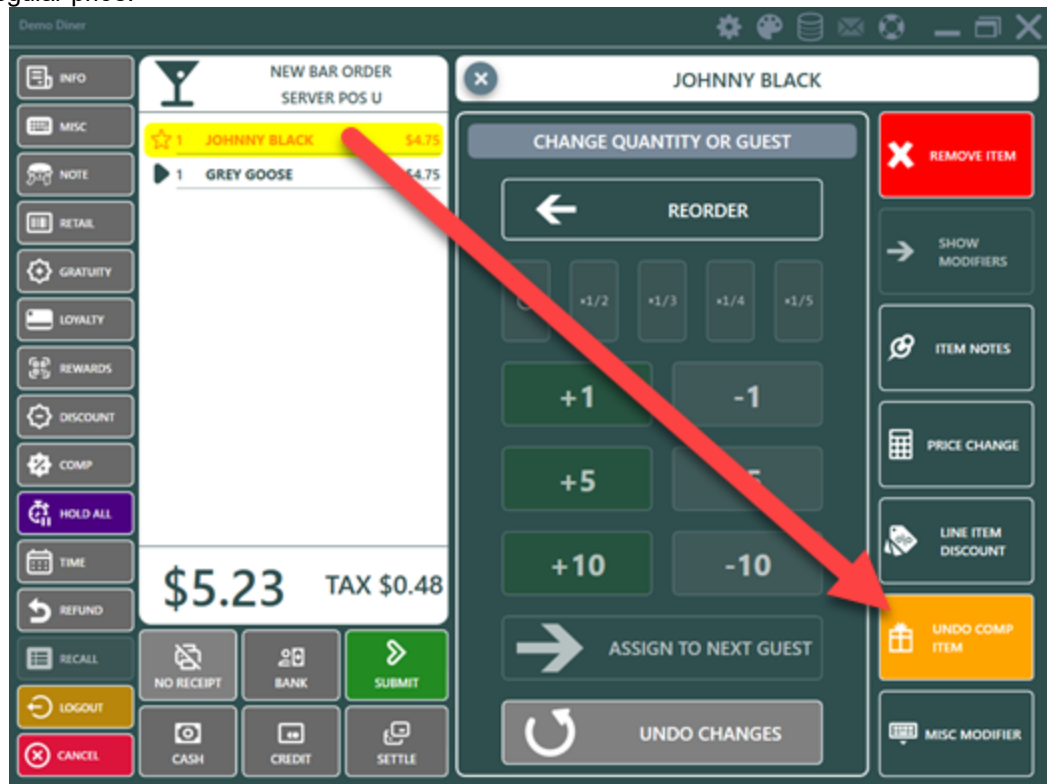
Orders and individual order items can be comped directly from the order entry screen by using the COMP ORDER or COMP ITEM buttons. Both comp buttons are enabled by selecting the job type from the drop-down list and setting the [Allow Comp](#)⁴³³ permission to Yes. Note that the COMP ORDER button is disabled for bar tabs, when splitting or combining an order, or if there are no order items.



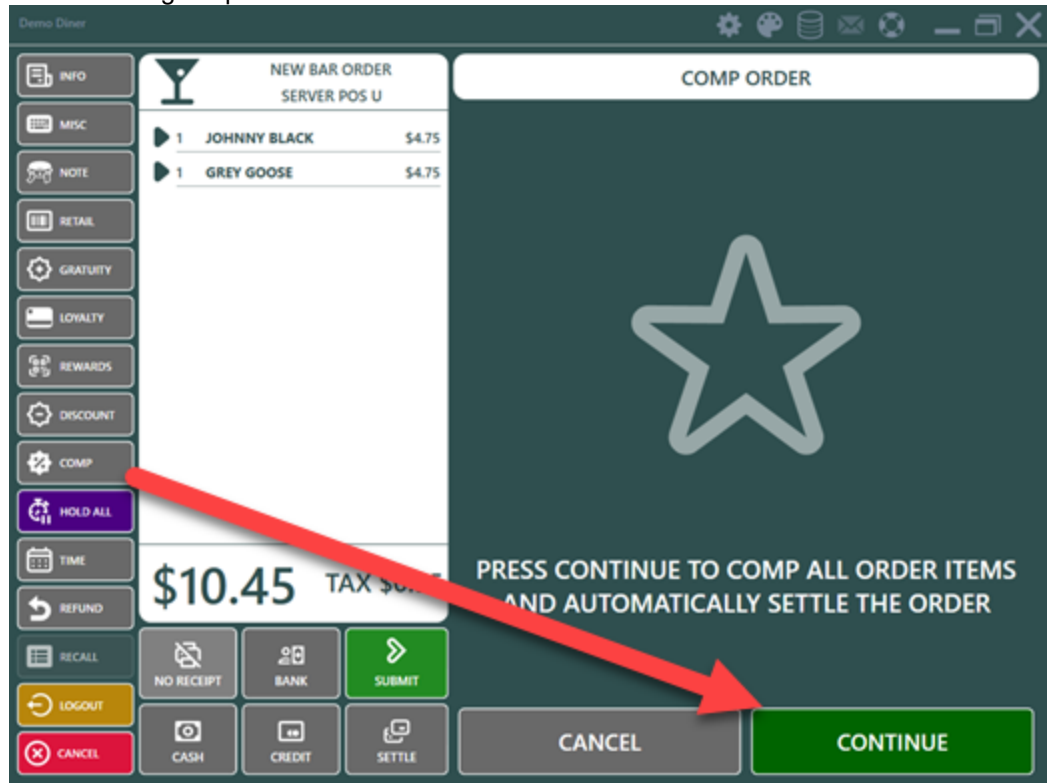
The COMP ITEM button appears after selecting the order item. Pressing the COMP ITEM button will set the price to zero.



If a mistake is made, select the order item again and press the UNDO COMP ITEM button to revert to the regular price.



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.



The current business day comps are shown on the manager screen end of day report.

Demo Diner

END OF DAY

CASH DRAWERS

END OF DAY

REPORTS

EMPLOYEE BANKING

SYSTEM

C:\ PROMPT

Notepad++

On-Screen Keyboard

FINISHED

PRINT

END OF DAY

DINE-IN(2) \$29.43

\$29.43

SUBTOTAL BY ITEM TYPE

Regular (3) \$19.25

Bar (2) \$9.50

Regular Modifier (6) \$7.50

\$36.25

SUBTOTAL BY REVENUE CENTER

FOOD \$26.75

LIQUOR \$9.50

\$36.25

SALES BY SERVER SUMMARY

POS U(3) \$29.43

\$29.43

SALES BY STATION SUMMARY

POS STATION 1 (1) \$0.00

POS STATION 51 (2) \$29.43

\$29.43

COMPS SUMMARY

GREY GOOSE (1) \$4.75

JOHNNY BLACK (1) \$4.75

\$9.50

CURRENT DAY - ALL POS STATIONS

LAST END OF DAY 6/16/2023 6:31 AM

OPEN ORDERS COUNT 2

OPEN ORDERS TOTAL \$29.43

OPEN PREAUTH COUNT 0

SETTLED ORDERS COUNT 1

TRANSACTIONS COUNT 0

VOIDS COUNT 0

VOIDS TOTAL \$0.00

SUBTOTAL \$0.00

TAX \$0.00

FIXED DISCOUNTS (-) \$0.00

CASH PAID OUT (-) \$0.00

DELIVERY CHARGES \$0.00

GRATUITIES \$0.00

SURCHARGES \$0.00

GRAND TOTAL \$0.00

RUN END OF DAY

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 **Comps Summary**.

Manager Screen Settings

Drawer Reset End Of Day End of Day Reports Special Events Revenue Centers Buttons External Applications

Search

Email

Email Report ☒

Report Email Recipients nick@amigopos.com

Report

Suppress Report Printing ☒

Cash Paid Out Summary ☒

Comps Summary ☒

Discounts Summary ☒

Include Scheduled Orders ☒

List Scheduled Orders ☒

Order Type Summary ☒

Removed Items Summary ☒

Show Confirmation

Display a confirmation prompt before running the end-of-day

Credit Cards

7 Credit Cards

7.1 Processing Choices

AmigoPOS offers a direct interface to [Datacap NETePay](#)^[96] and BAC Credomatic at no additional cost.

- Datacap NETePay supports all major US and Canada payment processors
- Datacap NETePay supports IP processing for rapid transaction processing.
- Datacap NETePay supports inexpensive card readers including those built in to many popular touch screen terminals
- Datacap NETePay supports EMV processing
- BAC Credomatic is offered for users in Central America and is available exclusively from LEXA S.A. Contact [LEXA S.A.](#) at +503 2223-3120
- AmigoPOS does not endorse any specific payment processor and does not accept residuals or payments of any sort from payment processors, banks or merchant account providers.

Businesses that prefer to use a [stand-alone credit/debit card terminal](#)^[94] 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 Credit Card payment method to complete the transaction. Refer to the [next help topic](#)^[94] for setup and usage instructions.

7.2 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.

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

AmigoPOS 9 Back Office

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS INVENTORY **SETTINGS**

Main Settings Credit Cards Gift Cards Rewards Hotel Interface Discounts Combos Event Pricing Translations Screen Size & SMS Email & SMS Mobile Apps All Program Settings Devices

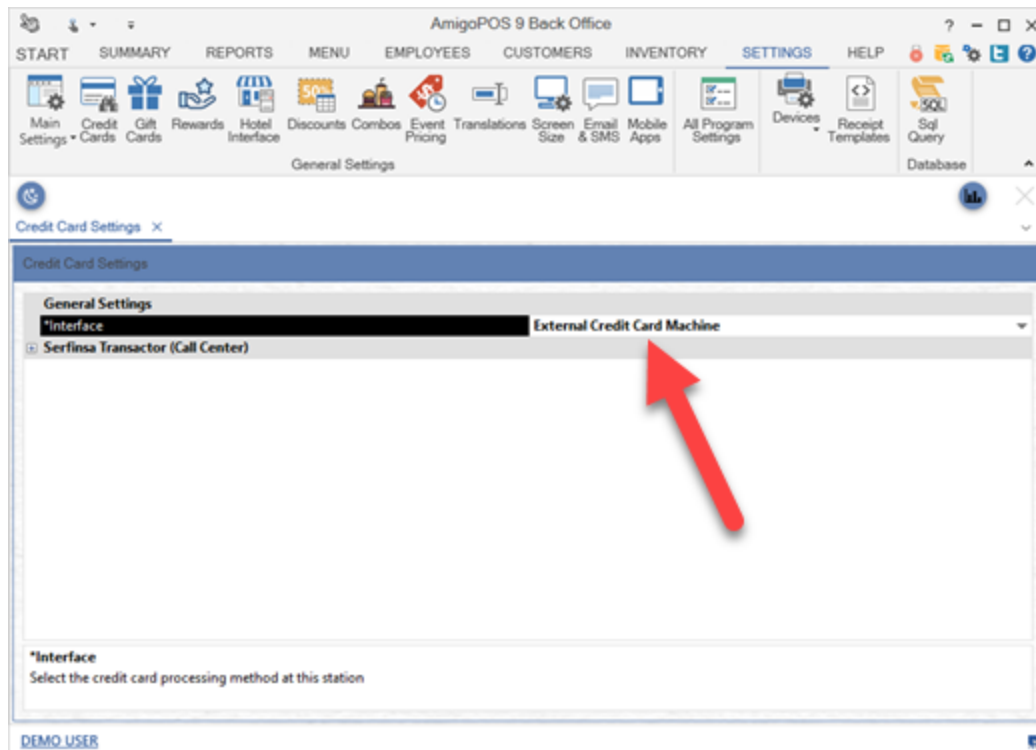
General Settings

Settle Screen Settings

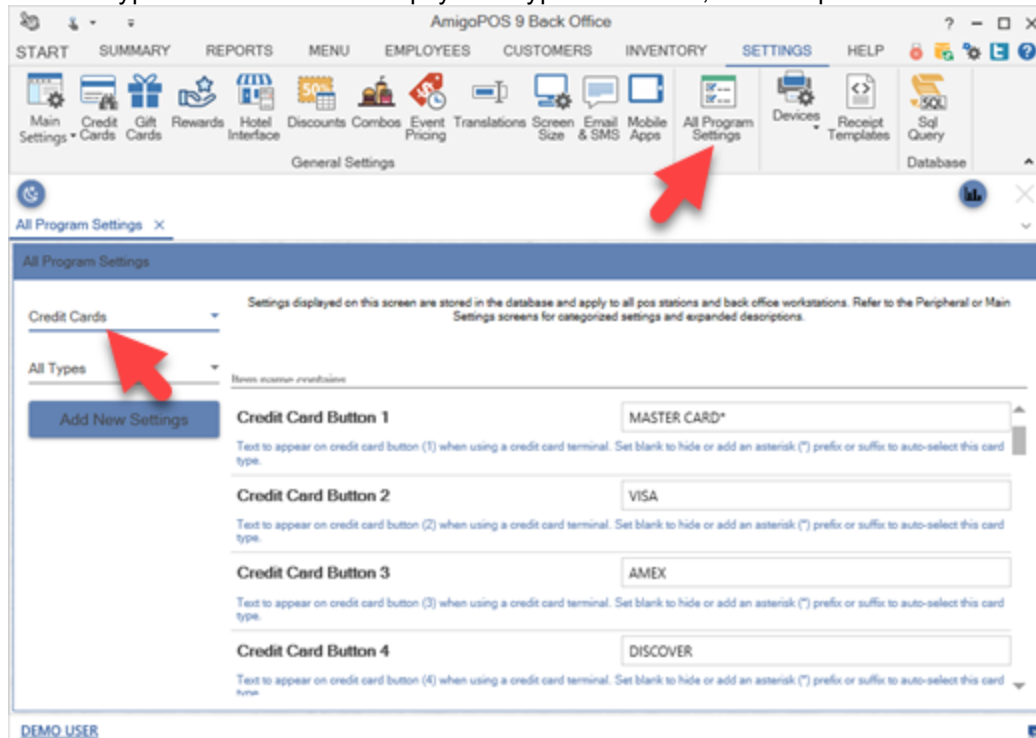
Payment Types Currency Shortcuts Foreign Currency Cash Payouts Local Payment Types

	DESCRIPTION	BUTTON CAPTION	BUTTON POSITION	HIDE BUTTON	OPEN
	Account Payment	ACCOUNT PAYMENT	14	<input type="checkbox"/>	
	Add Gratuity	ADD GRATUITY	3	<input type="checkbox"/>	
	Cash	CASH	1	<input type="checkbox"/>	
	Cash Bank	CASH BANK	9	<input type="checkbox"/>	
	Cash Refund	CASH REFUND	11	<input checked="" type="checkbox"/>	
	Check	CHECK	10	<input type="checkbox"/>	
	Comp	COMP	9	<input checked="" type="checkbox"/>	
>	Credit Card	CREDIT CARD	2	<input type="checkbox"/>	

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



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***.



7.3 Datacap NETePay

7.3.1 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>.

CREDIT Transactions	ADS	MP5	Nova Host	Nova Term	Concord EFS	Fifth Third Host	VITAL TSYS Term	VITAL TSYS Host	CardNet FDMS Term	Sterling Host	RBS Lynk Term	Heartland Term
	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	

CREDIT Transactions	GPS Term US	GPS Host US	Paymentech Host	Paymentech Term	FDMS Nashville
	Term US	Host US	Host	Term	Nashville
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

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 some 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 (also referred to as SALE/ADJUST) 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.

7.3.2 NETePay Installation

Datacap NETePay Director includes an installer that allows for a simplified installation process and go-forward automatic software updates. Contact your merchant account provider or payment processor to obtain NETePay. Many payment processors offer a lightweight In-Store version at no cost. Refer to Datacap [partner page](#) for additional information.

Important Notes Before you begin:

- Obtain a Deployment ID from your payment processor or merchant account provider
- A working internet connection is required for this process
- Firewalls should accept traffic on port 9000 (and port 9100 if using GIFTePay) so that other pos stations can connect to NETePay.

Complete the following steps to install and configure NETePay

Open the confirmation email sent from Datacap Systems with subject Epay Software Ready from Datacap Systems, Inc. and scroll to the bottom to find the Deployment ID.

Epay Software Ready from Datacap Systems, Inc.

Inbox X Ship.Notify@dcap.com X

Ship.Notify <ship.notify@dcap.com>

to Ship.Notify, datacapteam@mercurypay.com, techsupport@mercurypay.com, me

This order -123456.7- is ready. You can now load your ePay parameters using the deployment identifier below and begin processing payments.

Usage Program: Mercury Payments

Application: ePay Vantiv IP (Mercury) US EMV + Debit - MPH version 5.07.30

Deployment Identifier: MYDEPLOYMENTID

This deployment identifier will be required when NETePay is installed.

This version of NETePay is equipped with an installer that allows for a simplified installation process and go-forward automatic software updates. In lieu of a processor-specific NETePay, download the [NETePay 5 Director](#) to get started. [What is this?](#)

Part #	Description	Qty
8660.30	ePay Vantiv IP (Mercury) US EMV - MPH	1
SWIFB	Software Initial File Build	1

Ordered By: muser

Purchase Order: 1234567890

Notes

Amigo POS/8.x PDCX - Mtoken

Dealer

Company Name: Amigo Point of Sale

Contact:

Email: support@amigopos.com

Address 1:

Address 2:

City: Buffalo

State: NY

Postal Code: 14205

Country: US

Merchant

Name:

Store Number:

Contact:

Phone:

Address 1:

Address 2:

City:

State:

Postal Code:

Country:

Administrative MID:

POS/ECR: Amigo POS

Usage Program: Mercury Payments

Application: ePay Vantiv IP (Mercury) US EMV + Debit - MPH version 5.07.30

Deployment Identifier: MYDEPLOYMENTID

This deployment identifier will be required when NETePay is installed.

This version of NETePay is equipped with an installer that allows for a simplified installation process and go-forward automatic software updates. In lieu of a processor-specific NETePay, download the [NETePay 5 Director](#) to get started. [What is this?](#)

Click the [link](#) in the email to download NETePay 5 Director and download the file. Run the installer and click **Finish**. Click **Obtain Serial Number** when prompted to request a serial number and click **Next**. On the next screen select **I Have My Deployment ID**, enter the deployment identifier listed in the confirmation email and click **Next**. Verify that the merchant information is correct and click **Finish**.

Step 3 - Install NETePay 5 Director

Release date: 01/10/2018

This version of NETePay is equipped with an installer that allows for a simplified installation process and go-forward automatic software updates. In lieu of a processor-specific NETePay, download the NETePay 5 Director to get started.

To learn more about the NETePay 5 Director click [here](#).

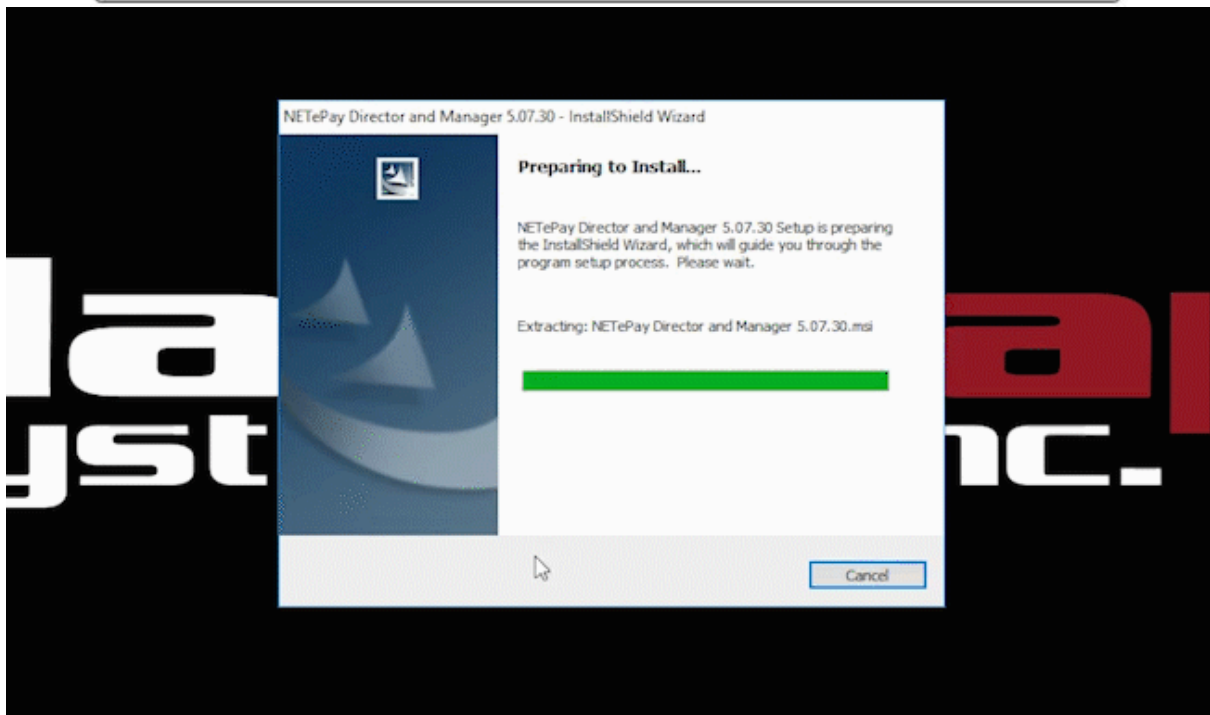
Download **User Guide**

- New build released 02/19/18
 - When applications are configured and running, the context menu now includes a new selection - Load Parameters (Stop/Start Director). The user can click one menu item to restart which will cause ePays to restart and reload parameters.
 - When a NETePay or QIFTePay window is opened, there are now four icons in the upper right corner that have the following functions.
 - View Merchant Parameters
 - PSCS
 - Email log
 - View log

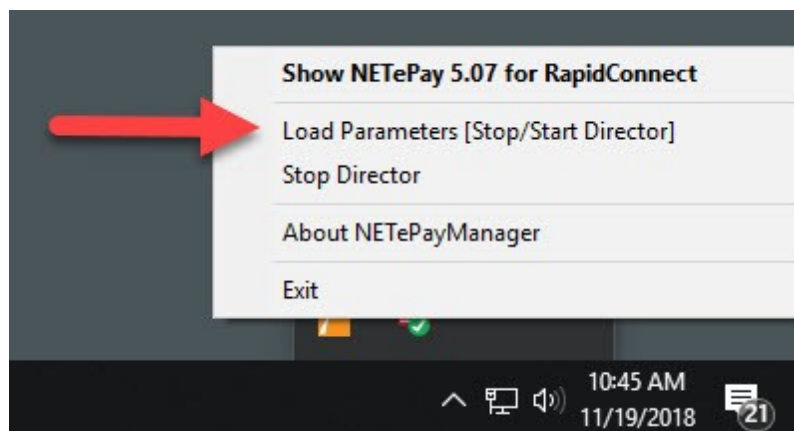
New build released 02/27/18 - Change made to properly close the connection between manager and director if an ePay window is being shown while manager is used to "Load Parameters [Start/Stop Director]" or "Stop Director".

New build released 08/28/18 - Changes to facilitate future release of terminal capture NETePays via NETePay Director.

10 Pro / 8 Pro / 7 Pro (Windows XP and Vista do not support TLS 1.2 which is now an industry requirement)



The merchant account parameters are automatically downloaded by NETePay. If the merchant account provider changes the account parameters in the future, the parameters must be downloaded to NETePay. Locate the Datacap NETePay Manager icon in the Windows taskbar and double-click on the icon.



7.3.3 Compatible Devices

Datacap NETePay is compatible with 2 types of devices:

- EMV: stand-alone credit card terminals that support EMV processing, generally connected to the pos station with a USB interface.
- PDCX: inexpensive mini magnetic card readers that can be purchased separately or are built in to all-in-one pos stations. Most magnetic card readers attached to all-in-one pos stations user either Magtek or IDTech firmware and are set to keyboard wedge emulation. These magnetic card readers must be set to use HID mode for compatibility with Datacap NETePay, as described in the [next help topic](#) ¹⁰¹.

Refer to <https://www.datacapsystems.com/compatible-devices> for the current list of devices that are compatible with Datacap NETePay.

7.3.4 Integrated Card Readers

This topic is for PDCX processing and does not apply to EMV processing.

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. Datacap NETePay requires the magnetic card reader to use HID mode. Most manufacturers provide a utility to convert the reader from keyboard wedge to HID mode, if the reader supports this function.

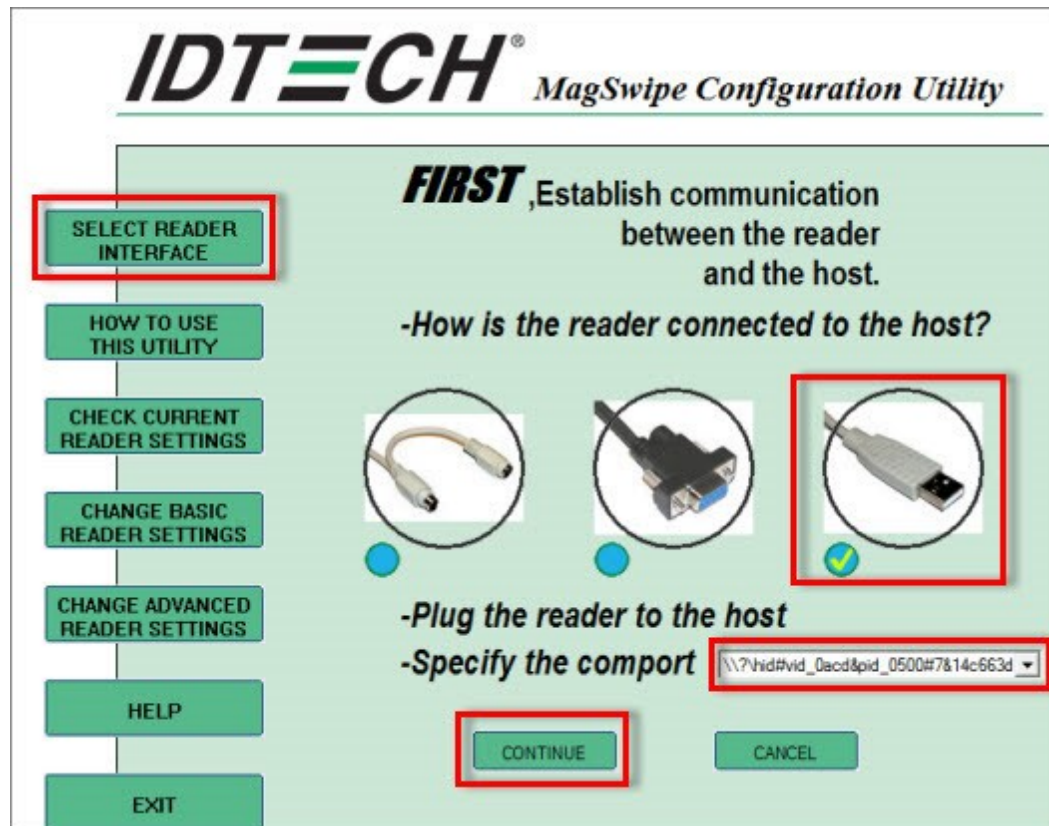
- [IDTech/Pos-X](#) ¹⁰¹
- [Magtek](#)

IDTech/Pos-X

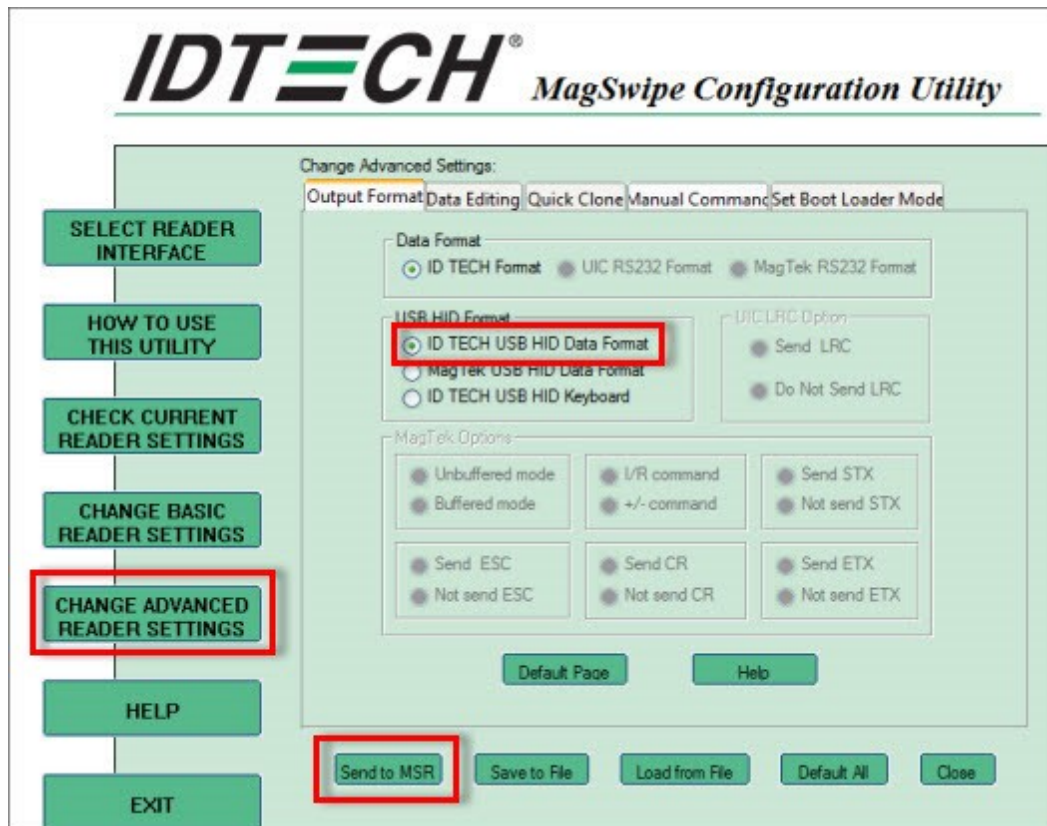
IDTech and Pos-X card readers are included with many popular touchscreens such as those manufactured by Pos-X. The card reader can be converted from keyboard wedge to HID by downloading the **Magswipe Configuration Utility** from <http://www.amigopos.com/Support/DriverDownload>.

1. Install the utility. Rebooting is not required.

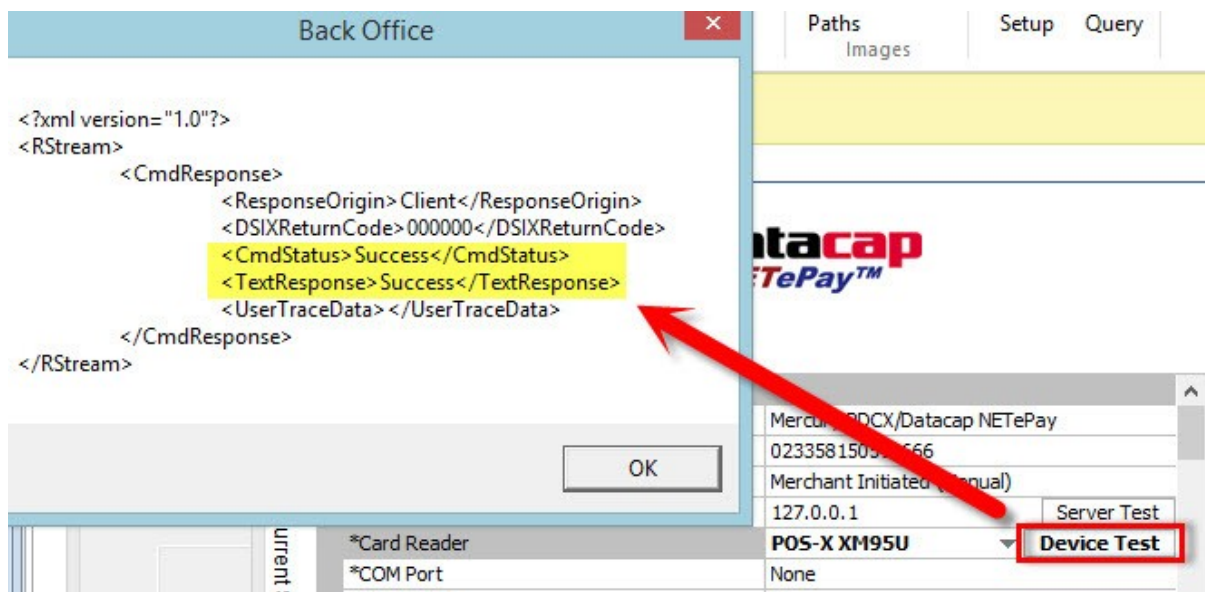
2. Click **SELECT READER INTERFACE** and select **USB**. The comport field should be set automatically. Click **CONTINUE**.



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.



4. Verify that the device is compatible by clicking **Device Test** in **Back Office | Settings | Credit Cards**.

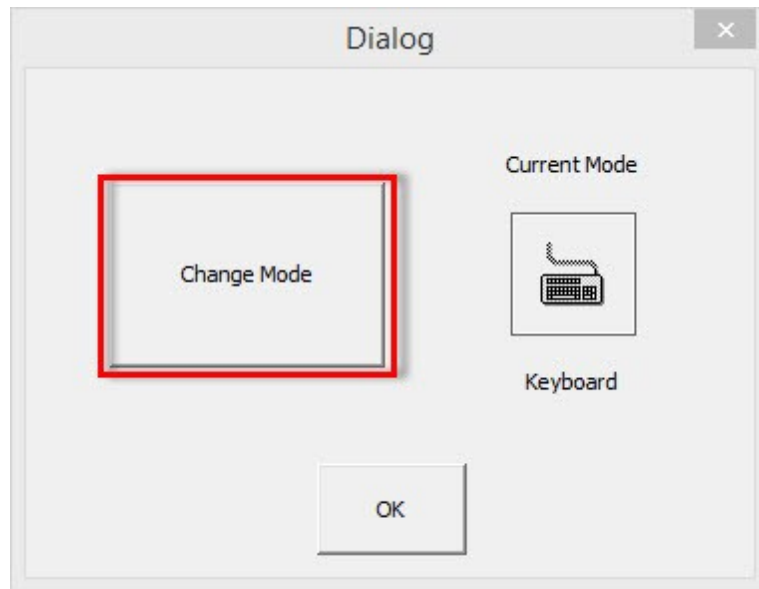


Magtek

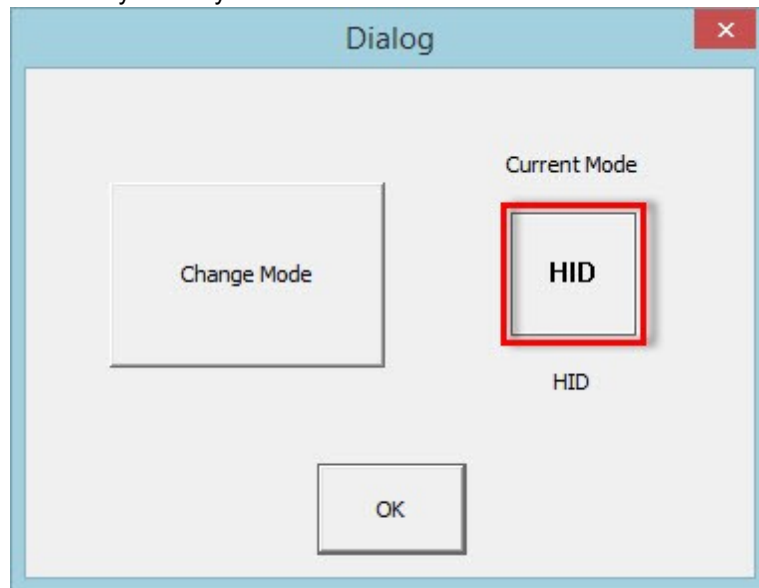
Magtek card readers are included with many popular touchscreens such as those manufactured by Elo Touch. The card reader can be converted from keyboard wedge to HID by downloading the **Magtek MSR Change Mode** utility from <http://www.amigopos.com/Support/DriverDownload>. The utility does not require installation.

1. Unzip the file to the desktop.

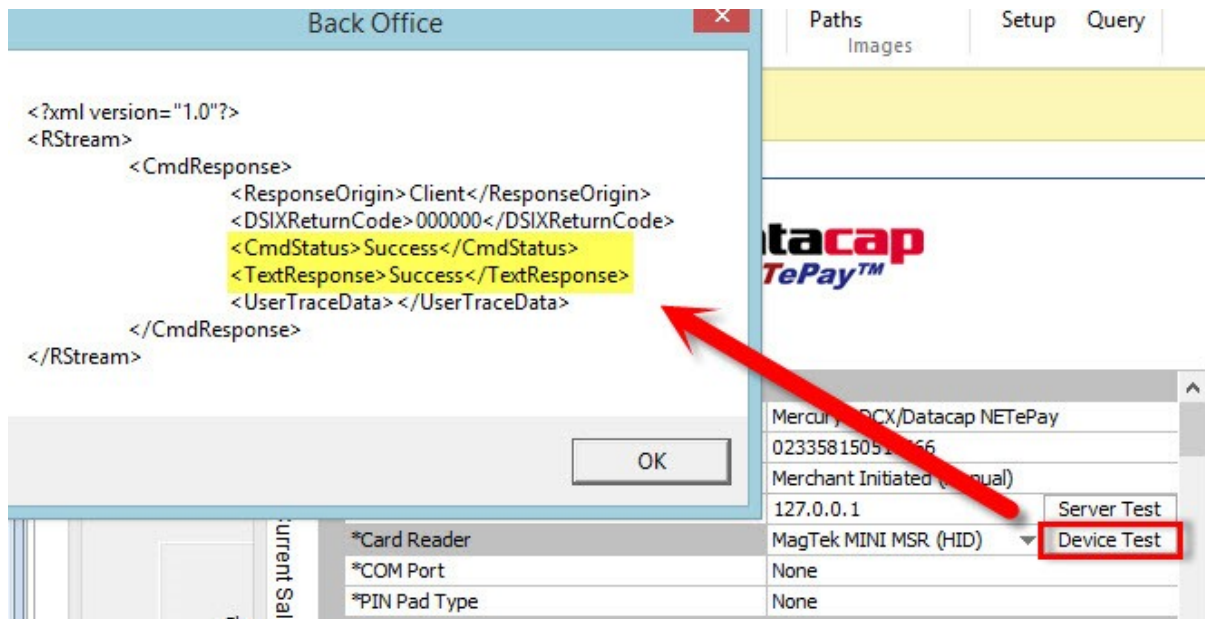
2. Right-click on the file and select **Run as administrator**.
3. Click **Change Mode**



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**.



7.3.5 Verifone VX805

This topic described the installation and setup of the Verifone VX805 with the USB interface. The installation of other devices is almost identical with the exception that a different device driver is used and the device may be assigned to a different Com port. Ethernet interface devices do not require the installation of a driver.

Obtain the Verifone VX805 or other compatible device from your payment processor or a vendor. A list of vendors is available by opening the [Datacap Systems device compatibility page](#) and clicking on the device, as shown below. Note that EMV devices must be programmed specifically for your payment processor; do not obtain the device from eBay or other retail outlets. Non-EMV devices generally do not require programming.



Driver Installation

The device 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 the vendor, download the driver from the AmigoPOS [Drivers and Utilities](#) download page.

Drivers and Utilities

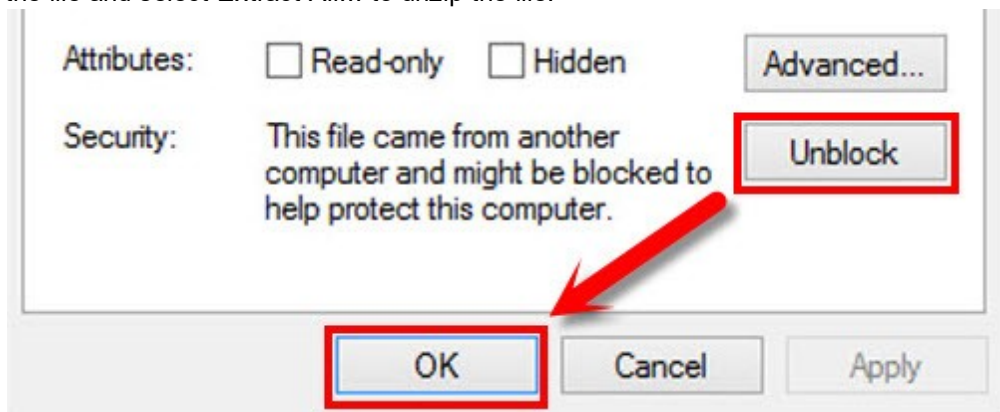
AMIGO POS PREREQUISITES

- [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 installation.

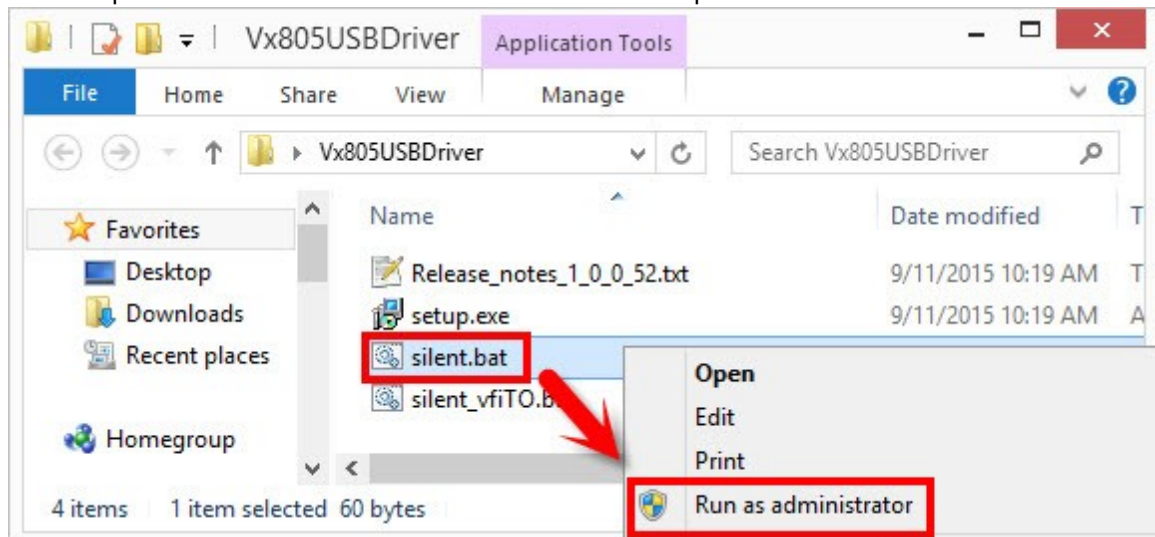
VERIFONE VX805 USB DRIVER

- [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.



Open the folder, right-click on silent.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.

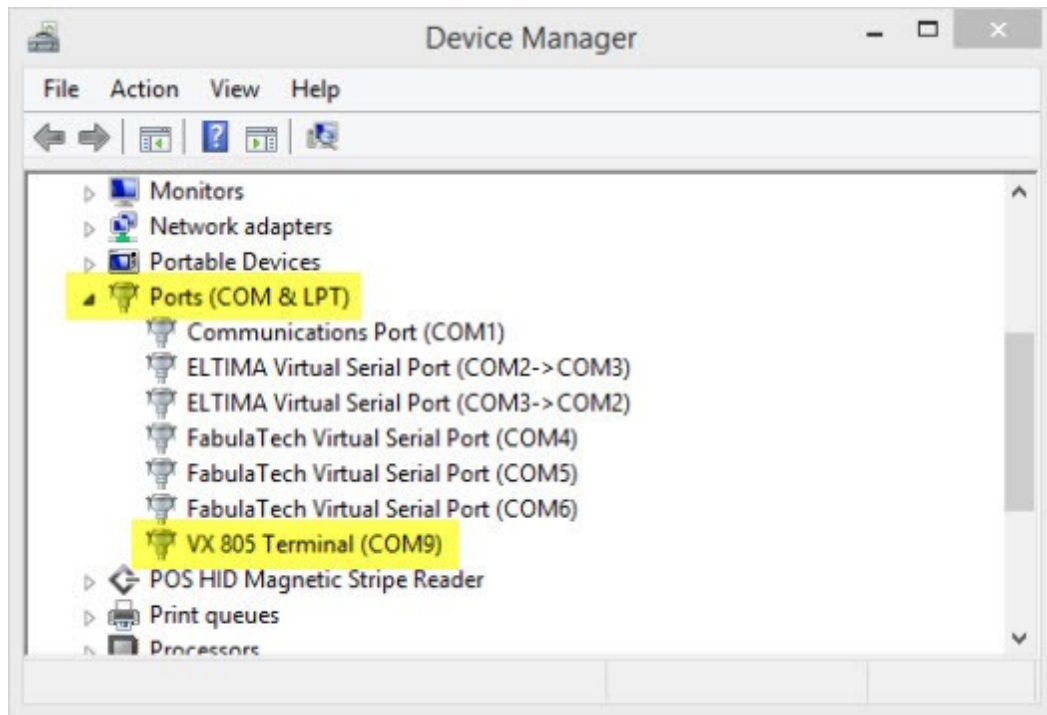


Connect the VX805

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.



7.3.6 EMV

7.3.6.1 Overview

Review the [EMV Fraud Liability Shift](#)^[115] topic to determine if an EMV merchant account is suitable for your business.

Prerequisites

1. Obtain a merchant account from your payment processor specifically for compatibility with Datacap NETePay EMV.
2. Obtain a device from your payment processor specifically for compatibility with Datacap NETePay EMV.
3. Obtain a deployment ID for Datacap NETePay from your payment processor. Many payment processors offer Datacap NETePay at no cost or reduced cost. Refer to the list of Datacap partners at <https://www.datacapsystems.com/partners/>.
4. Install and configure Datacap NETePay. Submit a [support ticket](#) if you prefer to have the technical support staff install and configure Datacap NETePay. When submitting the ticket, include the payment processor, device manufacturer, model and interface and a convenient time for a remote connection. The pos system should not be in use when NETePay is installed.
5. Install the [Verifone VX805](#)^[105] USB driver and attach the VX805 to the pos station

7.3.6.2 Settings

Device Compatibility

Open the [Datacap Systems device compatibility page](#) and click on the EMV or PDCX device to view the supported payment processors at the bottom of the page. In this example the Verifone VX805 is compatible with 9 payment processors.

The VX 805 is US EMV certified with the following Processors and Datacap products today:

CHASE	Elavon	electronic merchant systems	Electronic Payments	fiserv.
NETePay Hosted	NETePay	NETePay Hosted	NETePay Hosted	NETePay Hosted
NETePay	Tran Series	NETePay	NETePay	NETePay
Tran Series	TranCloud	Tran Series	Tran Series	Tran Series
TranCloud				TranCloud
global payments	TSYS	worldpay from FIS	worldpay from FIS Core 610	
NETePay	NETePay Hosted	NETePay	NETePay	
	NETePay	Tran Series	Tran Series	
	Tran Series	TranCloud	TranCloud	
	TranCloud			

Obtain the Verifone VX805 or other compatible device from your payment processor or a vendor. A list of vendors is available by opening the [Datacap Systems device compatibility page](#) and clicking on the device, as shown below. Note that EMV devices must be programmed specifically for your payment processor; do not obtain the device from eBay or other retail outlets. Non-EMV devices generally do not require programming.

Distribution Partners		
Verifone VX 805 PIN Pads can also be ordered from the distributors below - these distributors currently have access to the EMV-enabled version of XPI for the VX 805, allowing for an EMV-ready installation.		
POS Portal	Scansource	JRs POS Depot
The Phoenix Group	POS Data	UCP, Inc
Bluestar	CDE	

Secure Device ID

Both EMV and non-EMV devices are issued a Secure Device ID by Datacap. This value is required for the device to communicate with the POS. The chart at the bottom of the page displays a list of payment processors with the assigned Secure Device ID for both EMV and non-EMV devices.

Processor-Specific Secure Device IDs

EMV			Non-EMV	
Processor	Application Load	Encryption Key	SecureDeviceID	
			Encrypted (recommended)	Non-Encrypted
Chase	XPI 8.42b/8.43c		N/A	EMV_VX805_PAYMENTTECH
Elavon	XPI 12.05.13	Elavon PAN	EMV_VX805_ELAVON	N/A
First Data Rapid Connect	XPI 8.42b/8.43c		N/A	EMV_VX805_RAPIDCONNECT
Global Payments	XPI 12.05.13		N/A	EMV_VX805_GLOBALPAY
Electronic Payments	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
EMS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
EVO	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
Sterling	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
TSYS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
Worldpay Core 610 (formerly Vantiv/Fifth-Third)	XPI 8.42b/8.43c		N/A	EMV_VX805_VANTIV
Worldpay IP (MercuryPay)	XPI 12.11.35	Mercury TDES/DUKPT	EMV_VX805_MERCURY	
Worldpay Host	XPI 8.42b/8.43c		N/A	EMV_VX805_WORLDPAY

Back Office Settings

Open back office and navigate to Settings | Credit Cards. Select Datacap NETePay as the interface to reveal the parameters. Enter the merchant id and server URLs. The server URL is 127.0.0.1 when NETePay is installed at the local POS Station. All changes are saved immediately. Repeat the setup procedure on all pos stations used to process credit card transactions. Click [here](#) to view a description of batch settlement options.

Credit Card Settings

Transaction Settings Signature Slip Settings Log

Server Test Download Parameters

Search

General Settings (this station only)

Interface	Datacap NETePay	▼
Datacap Integration Type	EMV	▼
Merchant ID	AMIGOBUFF0GP	
Terminal ID	01352621	
NETePay IP Address	127.0.0.1	
NETePay Network Port	9000	
Datacap Secure Device Id	EMV_LANE3000_DATACAP_E2E	
USB Device COM Port	9	▼
Ethernet Device IP Address	192.168.1.8	
Ethernet Device Network Port	12000	

Card Swipe (all stations)

Automatic Card Swipe ☐

USB Device COM Port

Select the virtual COM port assigned to this USB device in the Windows Control Panel Device Manager. This setting is not required for devices with an Ethernet interface.

The following settings are available for Datacap NETePay EMV processing:

- **Interface:** Select Datacap NETePay
- **Integration Type:** Select EMV or PDCX
- **Merchant ID:** Enter the merchant number provided by the merchant account provider or payment processor.
- **Terminal ID:** This optional field should be empty for most payment processors. Some payment processors require a terminal id in addition to the merchant id.
- **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, 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. The computer running Datacap NETePay should use a static IP address so that the IP address does not changed if the network router is rebooted.
-

```

Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.522]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\Windows\system32>ipconfig

Windows IP Configuration

Ethernet adapter vEthernet (sw-local):

    Connection-specific DNS Suffix  . : 
    IPv6 Address. . . . . : 
    Temporary IPv6 Address. . . . . : 
    Link-local IPv6 Address . . . . . : fe80::1%11
    IPv4 Address. . . . . : 192.168.2.3
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : fe80::1%11
                                192.168.2.1

Ethernet adapter Ethernet 2:
  
```

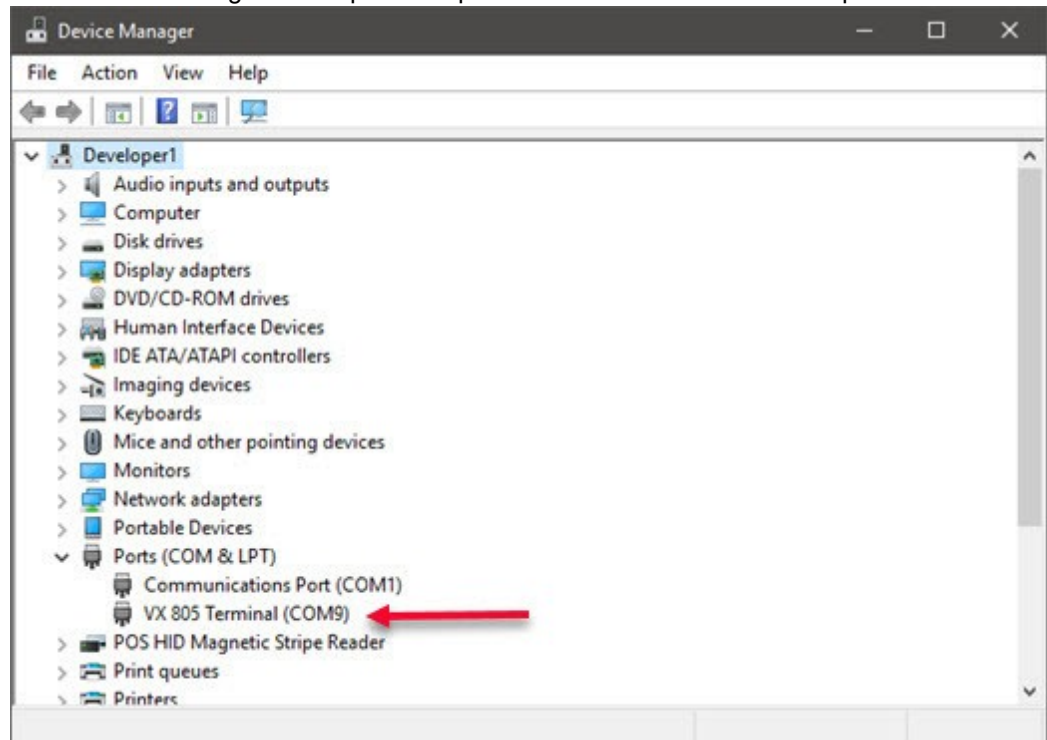
-
- **NETePay Network Port:** Enter the IP port Of the workstation running NETePay. The default port For NETePay Is 9000. This value can be verified in the NETePay setup screen.
- **Datacap Secure Device ID:** Locate the device on the [Datacap Systems device compatibility page](https://www.datacapsystems.com/device-compatibility-page) and click on the device to view a list of Secure Device IDs. Copy the Secure Device ID for your device/payment processor and paste it into the Datacap Secure Device ID field. In the example below, the Secure Device IDs for the Verifone VX805 and compatible payment processors are displayed on the right (the image below is copied from <https://www.datacapsystems.com/verifonevx805>).

Processor-Specific Secure Device IDs

EMV			Non-EMV	
Processor	Application Load	Encryption Key	SecureDeviceID	
			Encrypted (recommended)	Non-Encrypted
Chase	XPI 8.42b/8.43c		N/A	EMV_VX805_PAYMENTTECH
Elavon	XPI 12.05.13	Elavon PAN	EMV_VX805_ELAVON	N/A
First Data Rapid Connect	XPI 8.42b/8.43c		N/A	EMV_VX805_RAPIDCONNECT
Global Payments	XPI 12.05.13		N/A	EMV_VX805_GLOBALPAY
Electronic Payments	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
EMS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
EVO	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
Sterling	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
TSYS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
Worldpay Core 610 (formerly Vantiv/Fifth-Third)	XPI 8.42b/8.43c		N/A	EMV_VX805_VANTIV
Worldpay IP (MercuryPay)	XPI 12.11.35	Mercury TDES/DUKPT	EMV_VX805_MERCURY	
Worldpay Host	XPI 8.42b/8.43c		N/A	EMV_VX805_WORLDPAY

-
- **USB Device COM Port:** This setting applies only to devices with a USB interface. In most cases the Verifone VX805 driver is installed with COM Port 9 when using the batch file to install the

driver. Ingenico devices are usually set to use Com Port 3. Open the Windows Control Panel Windows Device Manager and expand the ports tab to view the virtual serial port.



-
- Ethernet Device IP Address: This setting is only used for devices with an Ethernet interface. Enter the IP address of the terminal (For example 192.168.x.x). Leave this setting empty for USB devices.
- Ethernet Network Port: This setting is only used for devices with an Ethernet interface. Enter the network port of the terminal (for example Ingenico devices use port 12000). Set to zero for USB devices.

Automatic Card Swipe

When this setting is enabled, the user is not required to click Swipe Card before starting the transaction. This setting is typically enabled for fast food and bars. If the setting is enabled and manual card entry is required, click cancel at the prompt and select the keyboard input method.

Credit Card Settings

Transaction Settings Signature Slip Settings Log

Server Test Download Parameters

Search

- > General Settings (this station only)
- > Card Swipe (all stations)
 - Automatic Card Swipe ☐
- > Processing Fee (all stations)
- > Transaction Options (this station only)

Automatic Card Swipe

Set to Yes to automatically prompt the cashier to swipe the card when starting a credit card sale. Set to No to force the cashier to select Swiped or Keyed Entry. This setting applies to all stations

Transaction Options

Credit Card Settings

Transaction Settings Signature Slip Settings Log

Server Test Download Parameters

Search

- > General Settings (this station only)
- > Card Swipe (all stations)
- > Processing Fee (all stations)
- > Transaction Options (this station only)

Transaction Type	Sale/Add Gratuity	▼
Print Sale/PreAuth Signature Slips	Both	▼
Print Gratuity/Capture Signature Slips	Both	▼
Disable Print Gratuity Line	<input type="checkbox"/>	
Disable Print Signature Line	<input type="checkbox"/>	
Print Copies	0	▼

Automatic Card Swipe

Set to Yes to automatically prompt the cashier to swipe the card when starting a credit card sale. Set to No to force the cashier to select Swiped or Keyed Entry. This setting applies to all stations

- **Transaction Type**

- **Sale/Add Tip:** The sale is captured and added to the batch 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 payment processor's web portal 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.

- **Preauthorize/Capture:** The initial sale is only preauthorized and is not added to the batch until the preauthorized transaction is captured. The gratuity is added to the preauthorized transaction when captured. Note that all preauthorized transactions must be captured in order to be added to the batch, even if the gratuity amount is zero. Note that to correct a mistake when entering the wrong gratuity amount, most payment processors require that the capture transaction is voided before the correct gratuity amount can be added. Preauthorized transactions cannot be voided. If a preauthorized transaction is not captured within a few days, the funds will no longer be withheld from the cardholder's account and the preauthorized transaction will be invalidated by the payment processor.
- **Print Sale/PreAuth Signature Slips:** Specify whether to print a signature slip when a sale or preauth is approved
- **Print Gratuity/Capture Signature Slips:** Specify whether to print a signature slip when a gratuity is added to a sale or a preauth is captured.
- **Disable Print Gratuity Line:** Check the box to suppress the signature slip gratuity line.
- **Disable Print Signature Line:** Check the box to suppress the signature slip signature line.
- **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.

7.3.6.3 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.

The following description of the fraud liability shift is paraphrased from the payment processor's 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 magnetic stripe 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 magnetic stripe 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.**

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.

7.3.7 PDCX

7.3.7.1 Overview

Overview

The Datacap NETePay PDCX integration method is fully PCI compliant and out of scope so that no sensitive cardholder data is passed to the pos software. The PDCX component is ideal for users with an existing magnetic card reader such as those included with many all-in-one pos stations. Many popular Magtek, IDTech and Pos-X card readers (both stand-alone and integrated) are compatible simply by [switching the mode](#)^[10] from keyboard wedge to HID. Refer to the [compatible device list](#)^[10] before ordering a new card reader or pin pad.

In addition, the Datacap Dial Bridge Backup can be used to provide a redundant connection using the phone line in case of internet or network disruption. Contact your merchant account provider's representative to verify compatibility with your payment processor.

Prerequisite

- Obtain a merchant account from the payment processor specifically for Datacap NETePay PDCX
- Install and configure Datacap NETePay

Setup

First change the mode of the magnetic card reader from keyboard wedge to HID, if necessary. A brief video describing the procedure to change the mode of the Pos-X or IDTech reader is available [here](#)^[10]. Obtain the merchant account parameters from your merchant account provider and open **Back Office | Settings | Credit Cards**.

General Settings	
*Interface	Datacap NETePay
*Integration Type	Datacap NETePay PDCX
*Merchant ID	755847002
*Terminal ID	
*NETePay IP Address	127.0.0.1 Server Test
*Server Port	9000
*Batch Method	Time Initiated (Automatic)
*Card Reader	POS-X XM95U Device Test
*COM Port	9

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

Setup Parameters

- **Interface:** Select Datacap NETePay
- **Integration Type:** Select Datacap NETePay PDCX
- **Merchant ID:** Enter the merchant number as shown in the email from the merchant account provider.
- **Server URLs:** Enter the IP address of the pos station that is running Datacap NETePay. Use 127.0.0.1 if Datacap NETePay 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. If the manufacturer and model of the card reader is unknown, use trial and error until the [test](#)¹¹⁷ 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 and fields.

Credit Card Settings X

Back Office

```

<?xml version="1.0"?>
<RStream>
  <CmdResponse>
    <ResponseOrigin>Client</ResponseOrigin>
    <DSIXReturnCode>000000</DSIXReturnCode>
    <CmdStatus>Success</CmdStatus>
    <TextResponse>Success</TextResponse>
    <UserTraceData></UserTraceData>
  </CmdResponse>
</RStream>

```

OK

General

*Interf

*Integ

*Merch

*Serve

*Batch

*Card

*COM

*PIN P

Trans

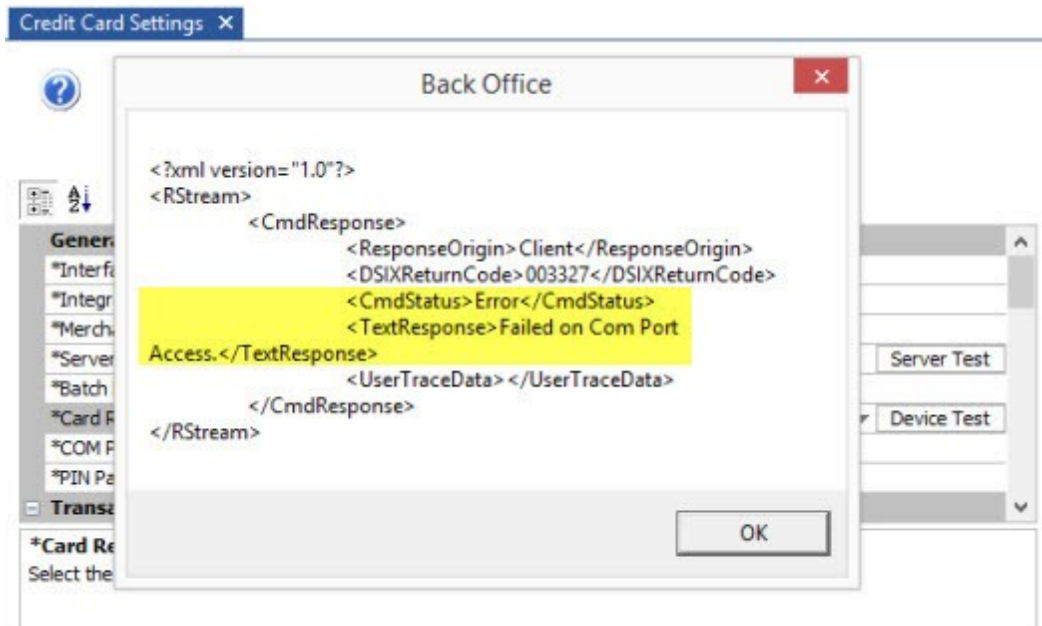
*Card R

Select the

Server Test

Device Test

An unsuccessful test is indicated by Error in the field and will include a detailed error description in the field. The 'Failed on Com Port Access' error is usually due to incorrect card reader selection or incorrect COM port selection.



7.3.7.2 Compatible Devices

Datacap NETePay is compatible with 2 types of devices:

- EMV: stand-alone credit card terminals that support EMV processing, generally connected to the pos station with a USB interface.
- PDCX: inexpensive mini magnetic card readers that can be purchased separately or are built in to all-in-one pos stations. Most magnetic card readers attached to all-in-one pos stations use either Magtek or IDTech firmware and are set to keyboard wedge emulation. These magnetic card readers must be set to use HID mode for compatibility with Datacap NETePay, as described in the [next help topic](#).

Refer to <https://www.datacapsystems.com/compatible-devices> for the current list of devices that are compatible with Datacap NETePay.

7.3.7.3 Existing Card Readers

This topic is for PDCX processing and does not apply to EMV processing.

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. Datacap NETePay requires the magnetic card reader to use HID mode. Most manufacturers provide a utility to convert the reader from keyboard wedge to HID mode, if the reader supports this function.

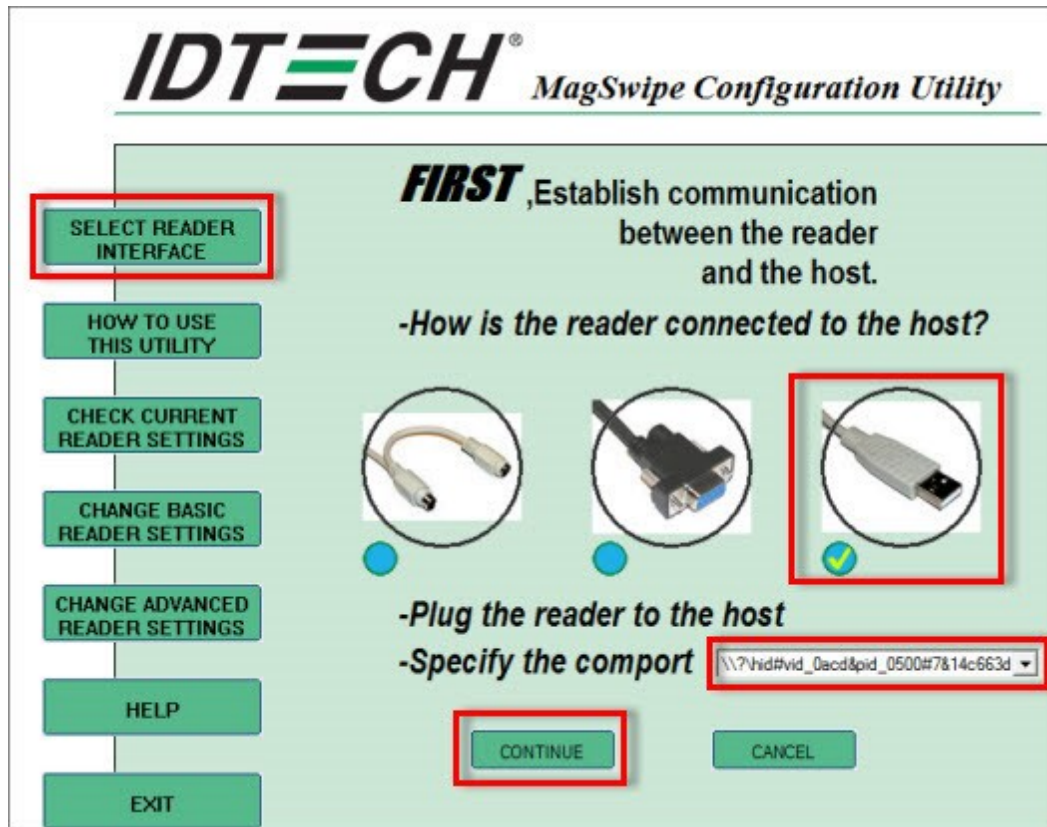
- [IDTech/Pos-X](#)
- [Magtek](#)

IDTech/Pos-X

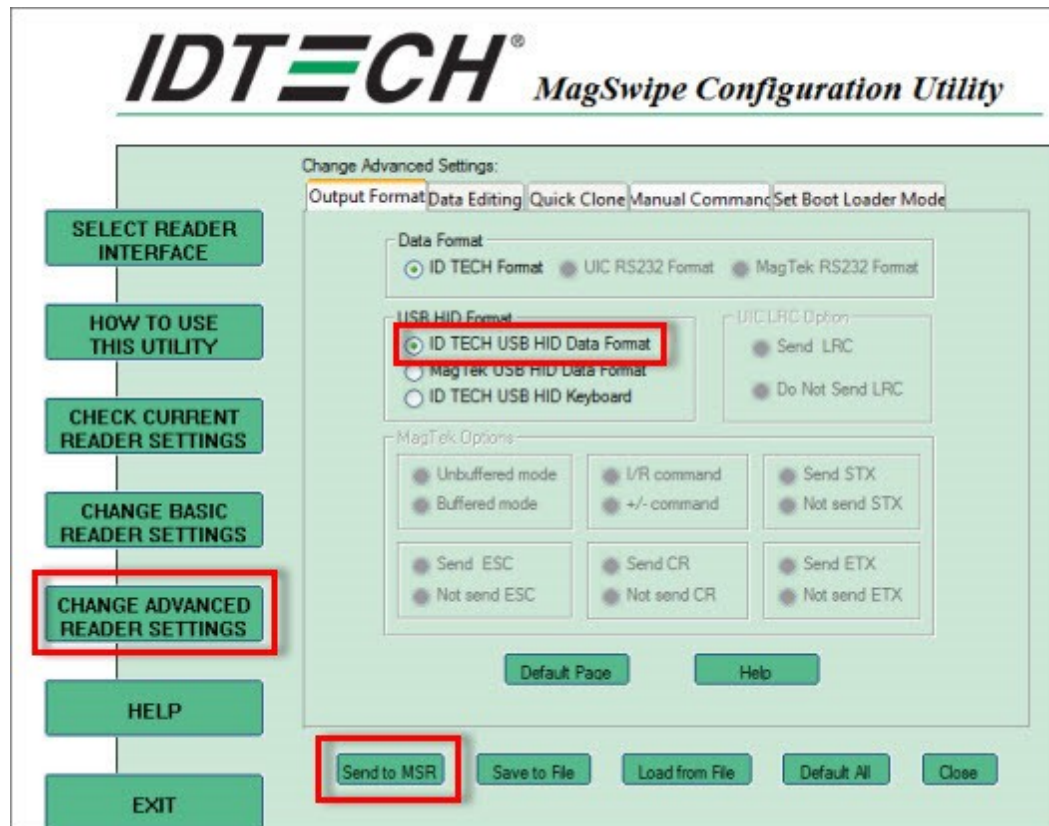
IDTech and Pos-X card readers are included with many popular touchscreens such as those manufactured by Pos-X. The card reader can be converted from keyboard wedge to HID by downloading the **Magswipe Configuration Utility** from <http://www.amigopos.com/Support/DriverDownload>.

1. Install the utility. Rebooting is not required.

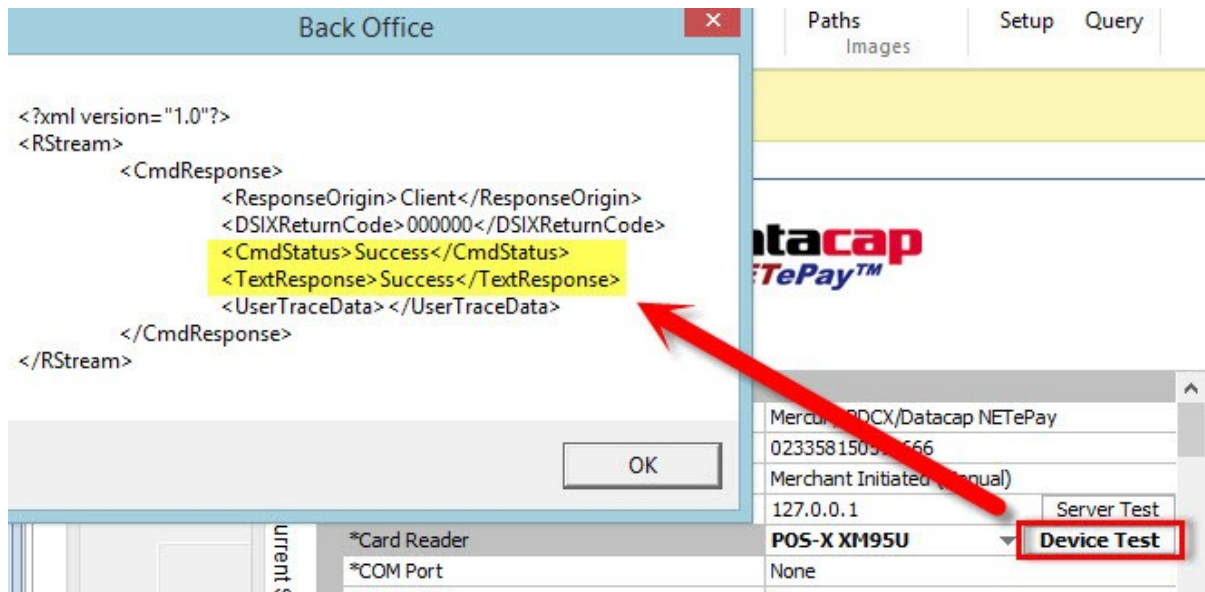
2. Click **SELECT READER INTERFACE** and select **USB**. The comport field should be set automatically. Click **CONTINUE**.



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.



4. Verify that the device is compatible by clicking **Device Test** in **Back Office | Settings | Credit Cards**.

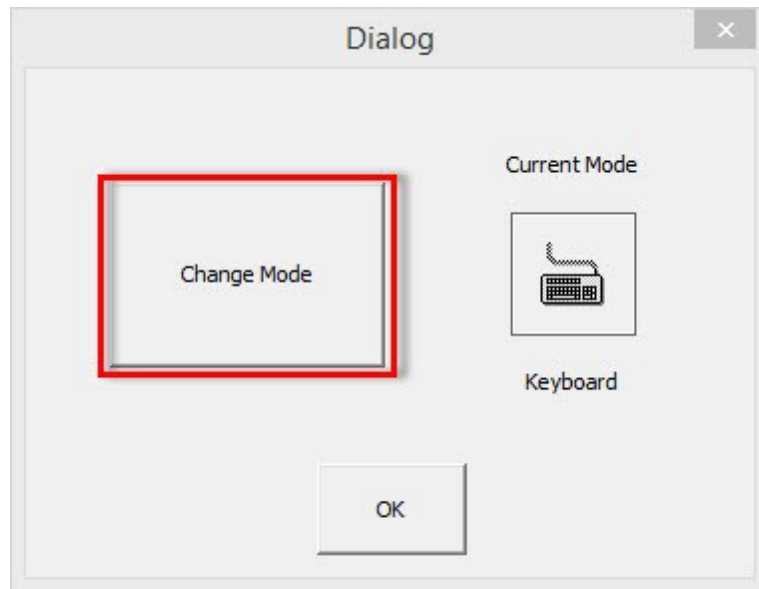


Magtek

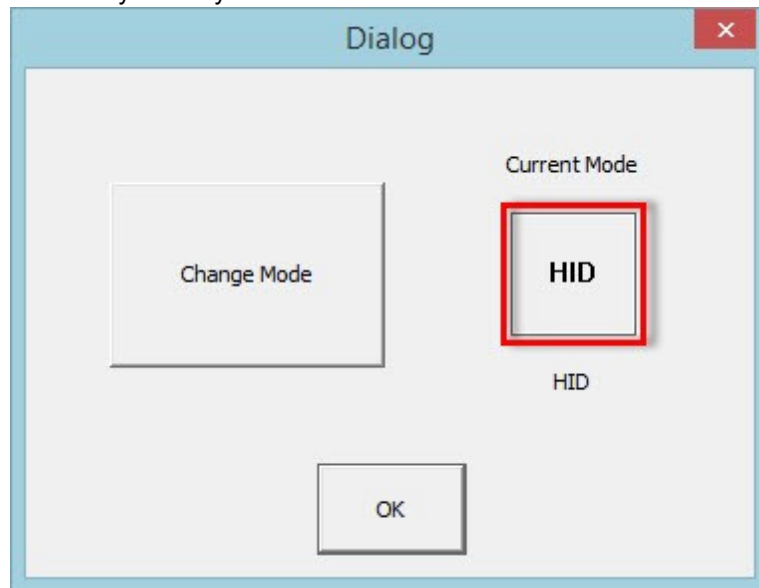
Magtek card readers are included with many popular touchscreens such as those manufactured by Elo Touch. The card reader can be converted from keyboard wedge to HID by downloading the **Magtek MSR Change Mode** utility from <http://www.amigopos.com/Support/DriverDownload>. The utility does not require installation.

1. Unzip the file to the desktop.

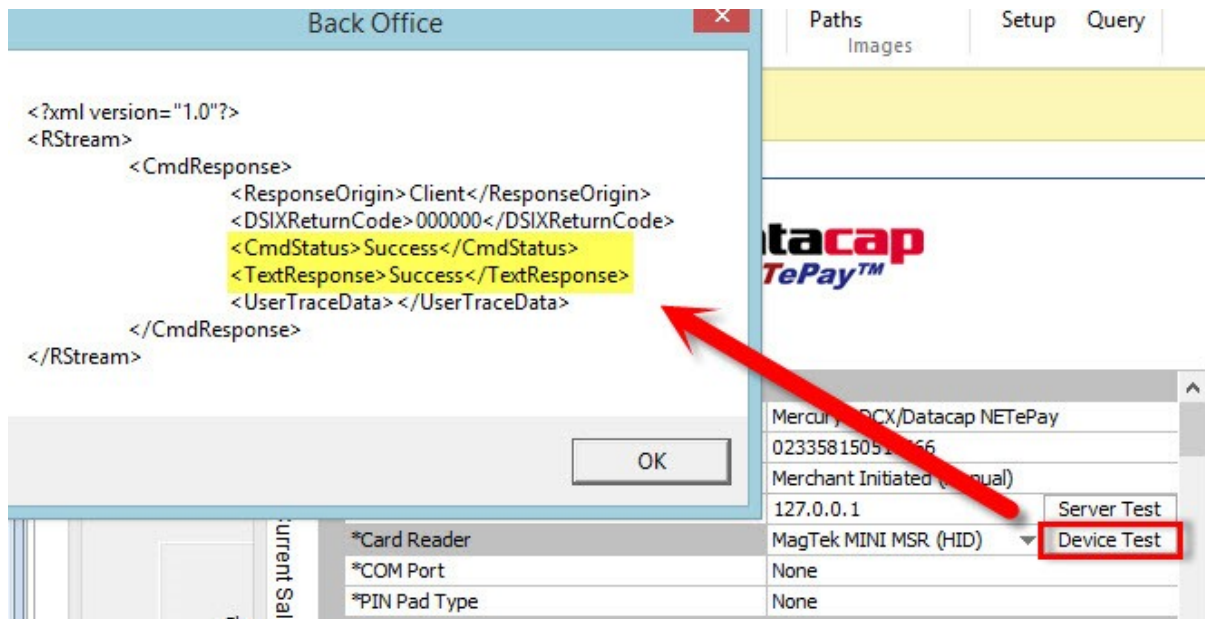
2. Right-click on the file and select **Run as administrator**.
3. Click **Change Mode**



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**.



7.3.7.4 Setup

Device Compatibility

Open the [Datacap Systems device compatibility page](#) and click on the EMV or PDCX device to view the supported payment processors at the bottom of the page. In this example the Verifone VX805 is compatible with 9 payment processors.

The VX 805 is US EMV certified with the following Processors and Datacap products today:

CHASE	Elavon	electronic merchant systems	ElectronicPayments	fiserv.
NETePay Hosted	NETePay	NETePay Hosted	NETePay Hosted	NETePay Hosted
NETePay	Tran Series	NETePay	NETePay	NETePay
Tran Series	TranCloud	Tran Series	Tran Series	Tran Series
TranCloud				TranCloud
globalpayments	TSYS	worldpay from FIS	worldpay from FIS Core 610	
NETePay	NETePay Hosted	NETePay	NETePay	
	NETePay	Tran Series	Tran Series	
	Tran Series	TranCloud	TranCloud	
	TranCloud			

Obtain the Verifone VX805 or other compatible device from your payment processor or a vendor. A list of vendors is available by opening the [Datacap Systems device compatibility page](#) and clicking on the device, as shown below. Note that EMV devices must be programmed specifically for your payment processor; do not obtain the device from eBay or other retail outlets. Non-EMV devices generally do not require programming.



Secure Device ID

Both EMV and non-EMV devices are issued a Secure Device ID by Datacap. This value is required for the device to communicate with the POS. The chart at the bottom of the page displays a list of payment processors with the assigned Secure Device ID for both EMV and non-EMV devices.

Processor-Specific Secure Device IDs

EMV					Non-EMV				
Processor	Application Load	Encryption Key	SecureDeviceID		Processor	Application Load	Encryption Key	SecureDeviceID	
			Encrypted (recommended)	Non-Encrypted				Encrypted (recommended)	Non-Encrypted
Chase	XPI 8.42b/8.43c		N/A	EMV_VX805_PAYMENTECH					
Elavon	XPI 12.05.13	Elavon PAN	EMV_VX805_ELAVON	N/A					
First Data Rapid Connect	XPI 8.42b/8.43c		N/A	EMV_VX805_RAPIDCONNECT					
Global Payments	XPI 12.05.13		N/A	EMV_VX805_GLOBALPAY					
Electronic Payments	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS					
EMS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS					
EVO	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS					
Sterling	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS					
TSYS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS					
Worldpay Core 610 (formerly Vantiv/Fifth-Third)	XPI 8.42b/8.43c		N/A	EMV_VX805_VANTIV					
Worldpay IP (MercuryPay)	XPI 12.11.35	Mercury TDES/DUKPT	EMV_VX805_MERCURY						
Worldpay Host	XPI 8.42b/8.43c		N/A	EMV_VX805_WORLDPAY					

Back Office Settings

Open back office and navigate to Settings | Credit Cards. Select Datacap NETePay as the interface to reveal the parameters. Enter the merchant id and server URLs. The server URL is 127.0.0.1 when NETePay is installed at the local POS Station. All changes are saved immediately. Repeat the setup procedure on all pos stations used to process credit card transactions. Click [here](#) to view a description of batch settlement options.

Credit Card Settings

Transaction Settings Signature Slip Settings Log

Server Test Download Parameters

Search

General Settings (this station only)

Interface	Datacap NETePay	▼
Datacap Integration Type	EMV	▼
Merchant ID	AMIGOBUFF0GP	
Terminal ID	01352621	
NETePay IP Address	127.0.0.1	
NETePay Network Port	9000	
Datacap Secure Device Id	EMV_LANE3000_DATACAP_E2E	
USB Device COM Port	9	▼
Ethernet Device IP Address	192.168.1.8	
Ethernet Device Network Port	12000	

Card Swipe (all stations)

Automatic Card Swipe ☐

USB Device COM Port

Select the virtual COM port assigned to this USB device in the Windows Control Panel Device Manager. This setting is not required for devices with an Ethernet interface.

The following settings are available for Datacap NETePay EMV processing:

- **Interface:** Select Datacap NETePay
- **Integration Type:** Select EMV or PDCX
- **Merchant ID:** Enter the merchant number provided by the merchant account provider or payment processor.
- **Terminal ID:** This optional field should be empty for most payment processors. Some payment processors require a terminal id in addition to the merchant id.
- **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, 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. The computer running Datacap NETePay should use a static IP address so that the IP address does not changed if the network router is rebooted.
-

```

Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.522]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\Windows\system32>ipconfig

Windows IP Configuration

Ethernet adapter vEthernet (sw-local):

    Connection-specific DNS Suffix  . : 
    IPv6 Address. . . . . : 
    Temporary IPv6 Address. . . . . : 
    Link-local IPv6 Address . . . . . : fe80::1%11
    IPv4 Address. . . . . : 192.168.2.3
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : fe80::1%11
                                192.168.2.1

Ethernet adapter Ethernet 2:
  
```

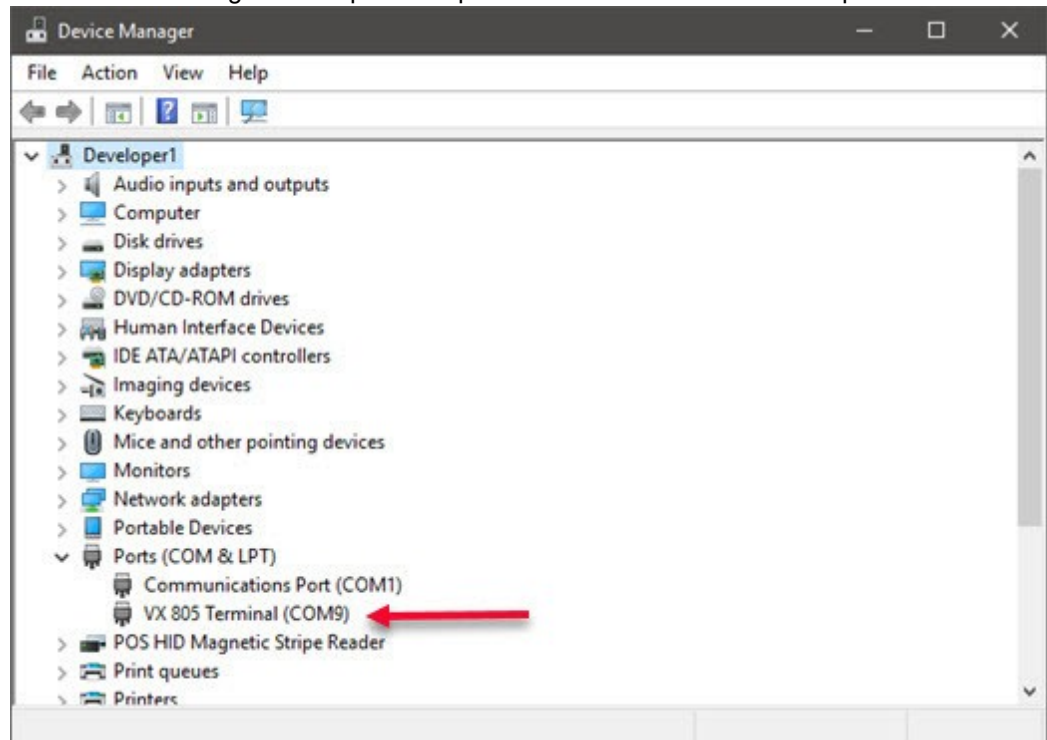
- **NETePay Network Port:** Enter the IP port Of the workstation running NETePay. The default port For NETePay Is 9000. This value can be verified in the NETePay setup screen.
- **Datacap Secure Device ID:** Locate the device on the [Datacap Systems device compatibility page](https://www.datacapsystems.com/verifonevx805) and click on the device to view a list of Secure Device IDs. Copy the Secure Device ID for your device/payment processor and paste it into the Datacap Secure Device ID field. In the example below, the Secure Device IDs for the Verifone VX805 and compatible payment processors are displayed on the right (the image below is copied from <https://www.datacapsystems.com/verifonevx805>).

Processor-Specific Secure Device IDs

EMV			Non-EMV	
Processor	Application Load	Encryption Key	SecureDeviceID	
			Encrypted (recommended)	Non-Encrypted
Chase	XPI 8.42b/8.43c		N/A	EMV_VX805_PAYMENTTECH
Elavon	XPI 12.05.13	Elavon PAN	EMV_VX805_ELAVON	N/A
First Data Rapid Connect	XPI 8.42b/8.43c		N/A	EMV_VX805_RAPIDCONNECT
Global Payments	XPI 12.05.13		N/A	EMV_VX805_GLOBALPAY
Electronic Payments	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
EMS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
EVO	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
Sterling	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
TSYS	XPI 8.42b/8.43c		N/A	EMV_VX805_TSYS
Worldpay Core 610 (formerly Vantiv/Fifth-Third)	XPI 8.42b/8.43c		N/A	EMV_VX805_VANTIV
Worldpay IP (MercuryPay)	XPI 12.11.35	Mercury TDES/DUKPT	EMV_VX805_MERCURY	
Worldpay Host	XPI 8.42b/8.43c		N/A	EMV_VX805_WORLDPAY

- **USB Device COM Port:** This setting applies only to devices with a USB interface. In most cases the Verifone VX805 driver is installed with COM Port 9 when using the batch file to install the

driver. Ingenico devices are usually set to use Com Port 3. Open the Windows Control Panel Windows Device Manager and expand the ports tab to view the virtual serial port.



-
- Ethernet Device IP Address: This setting is only used for devices with an Ethernet interface. Enter the IP address of the terminal (For example 192.168.x.x). Leave this setting empty for USB devices.
- Ethernet Network Port: This setting is only used for devices with an Ethernet interface. Enter the network port of the terminal (for example Ingenico devices use port 12000). Set to zero for USB devices.

Automatic Card Swipe

When this setting is enabled, the user is not required to click Swipe Card before starting the transaction. This setting is typically enabled for fast food and bars. If the setting is enabled and manual card entry is required, click cancel at the prompt and select the keyboard input method.

Credit Card Settings

Transaction Settings Signature Slip Settings Log

Server Test Download Parameters

Search

- > General Settings (this station only)
- > Card Swipe (all stations)
 - Automatic Card Swipe ☐
- > Processing Fee (all stations)
- > Transaction Options (this station only)

Automatic Card Swipe

Set to Yes to automatically prompt the cashier to swipe the card when starting a credit card sale. Set to No to force the cashier to select Swiped or Keyed Entry. This setting applies to all stations

Transaction Options

Credit Card Settings

Transaction Settings Signature Slip Settings Log

Server Test Download Parameters

Search

- > General Settings (this station only)
- > Card Swipe (all stations)
- > Processing Fee (all stations)
- > Transaction Options (this station only)

Transaction Type	Sale/Add Gratuity	▼
Print Sale/PreAuth Signature Slips	Both	▼
Print Gratuity/Capture Signature Slips	Both	▼
Disable Print Gratuity Line	<input type="checkbox"/>	
Disable Print Signature Line	<input type="checkbox"/>	
Print Copies	0	▼

Automatic Card Swipe

Set to Yes to automatically prompt the cashier to swipe the card when starting a credit card sale. Set to No to force the cashier to select Swiped or Keyed Entry. This setting applies to all stations

- **Transaction Type**

- **Sale/Add Tip:** The sale is captured and added to the batch 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 payment processor's web portal 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.

- **Preauthorize/Capture:** The initial sale is only preauthorized and is not added to the batch until the preauthorized transaction is captured. The gratuity is added to the preauthorized transaction when captured. Note that all preauthorized transactions must be captured in order to be added to the batch, even if the gratuity amount is zero. Note that to correct a mistake when entering the wrong gratuity amount, most payment processors require that the capture transaction is voided before the correct gratuity amount can be added. Preauthorized transactions cannot be voided. If a preauthorized transaction is not captured within a few days, the funds will no longer be withheld from the cardholder's account and the preauthorized transaction will be invalidated by the payment processor.
- **Print Sale/PreAuth Signature Slips:** Specify whether to print a signature slip when a sale or preauth is approved
- **Print Gratuity/Capture Signature Slips:** Specify whether to print a signature slip when a gratuity is added to a sale or a preauth is captured.
- **Disable Print Gratuity Line:** Check the box to suppress the signature slip gratuity line.
- **Disable Print Signature Line:** Check the box to suppress the signature slip signature line.
- **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.

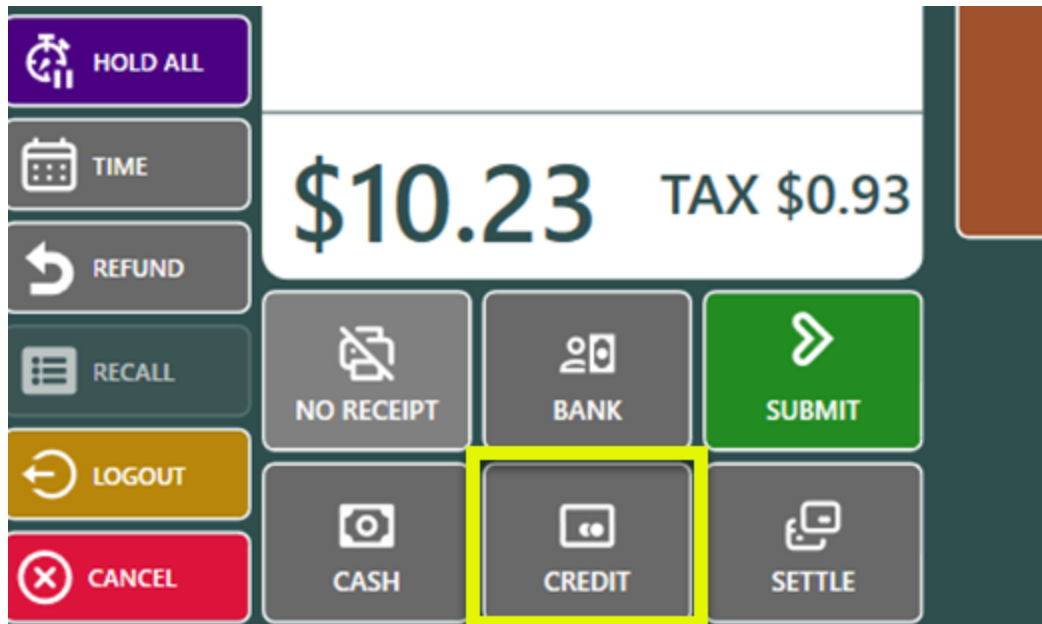
7.3.8 Usage

The transaction types listed below are available when Datacap NETePay integrated credit card processing interface.

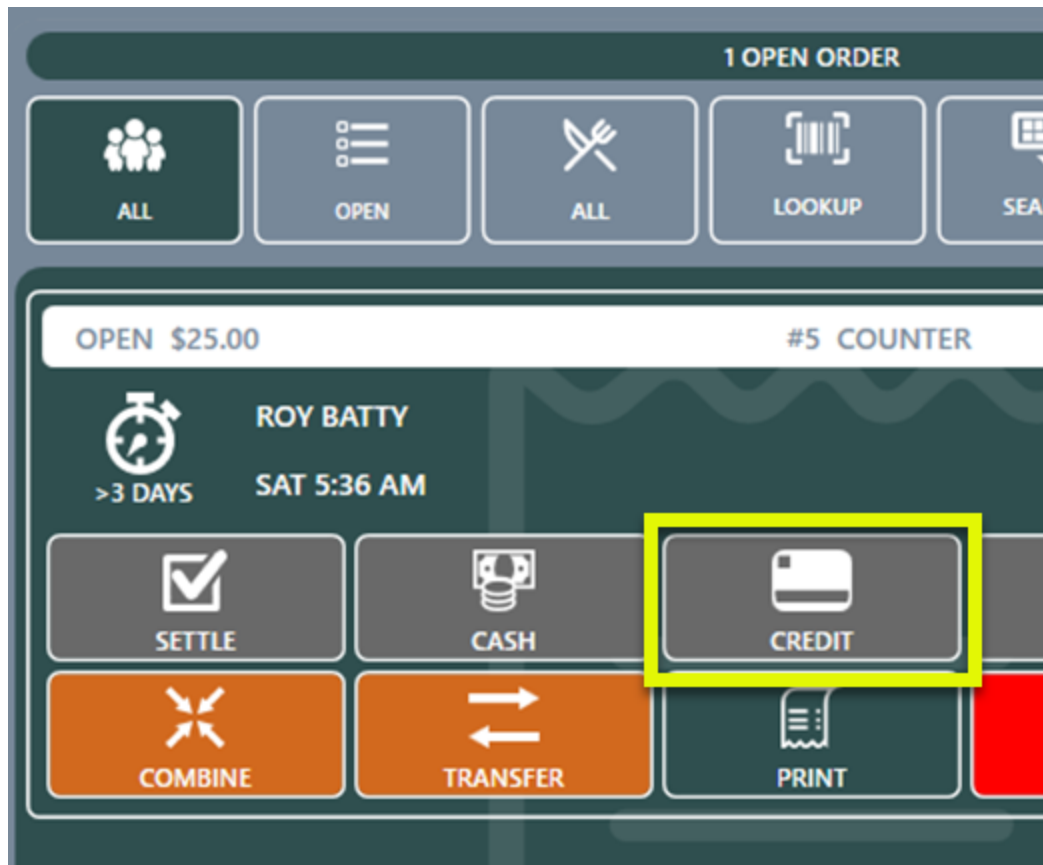
- [SALE](#) ¹²⁹
- [DEBIT](#) ¹³³
- [VOICE AUTH](#) ¹³⁴
- [ADD TIP](#) ¹³⁶
- [VOID](#) ¹³⁸
- [REFUND](#) ¹³⁹
- [REVERSAL](#) ¹⁴¹

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

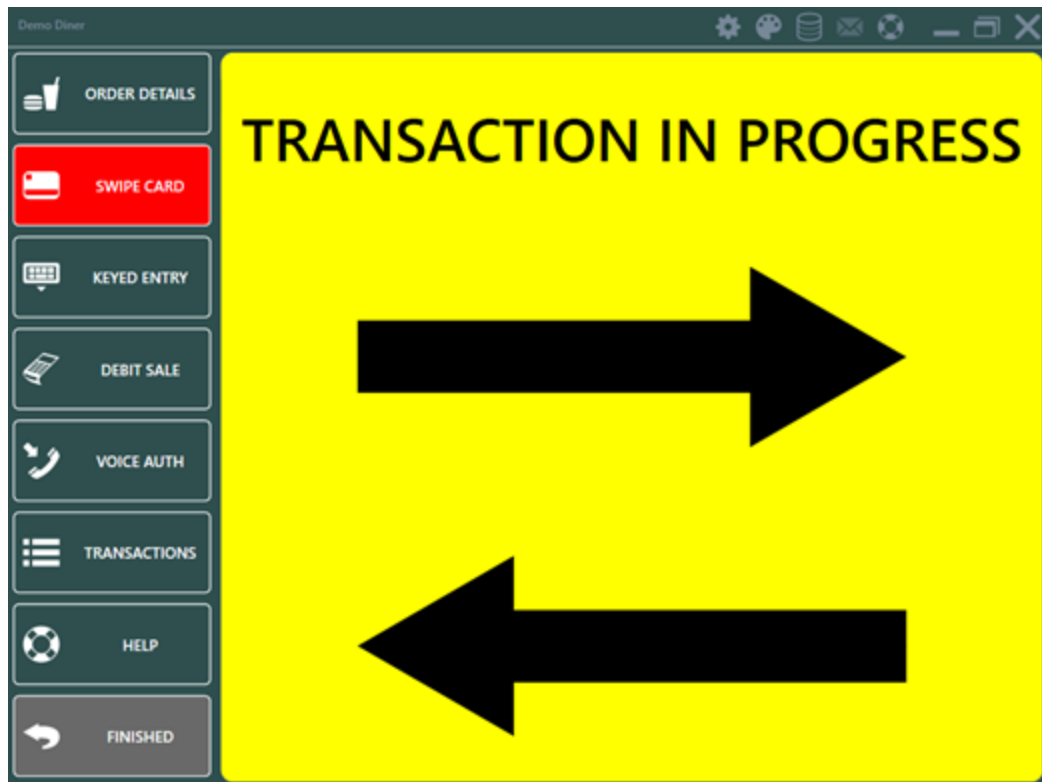


Order Recall List

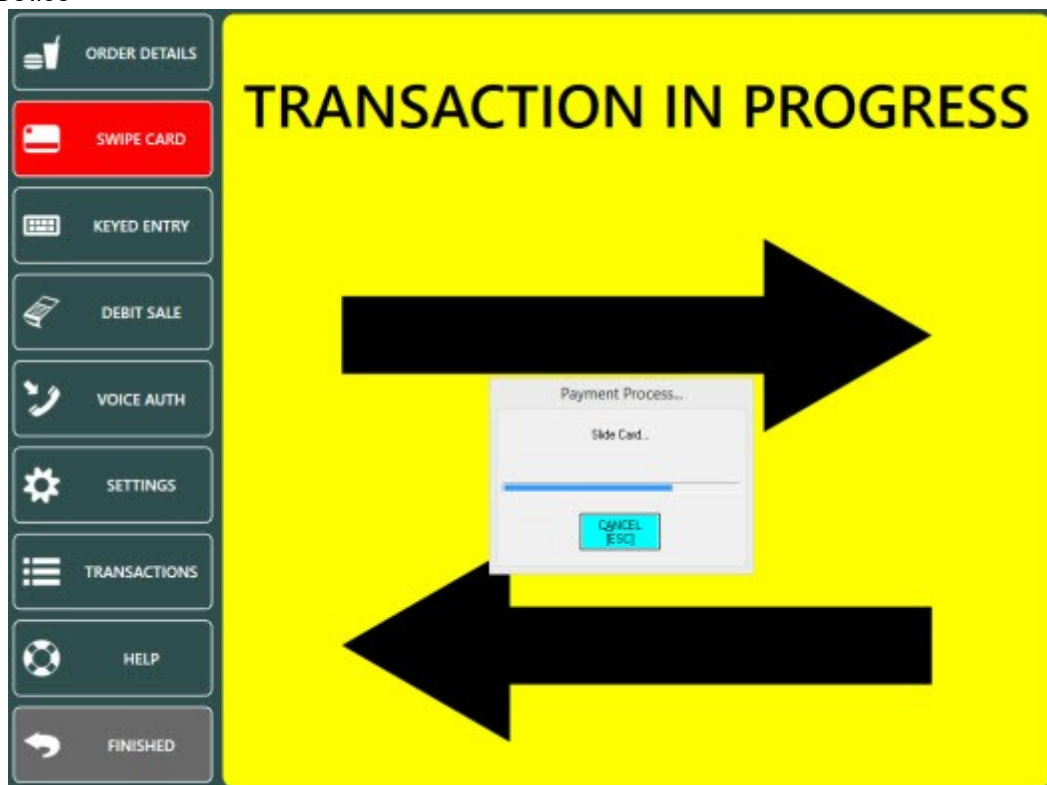


Settle Screen

Press the CREDIT button following by the SWIPE CARD button to automatically initialize the card reader and display the card swipe prompt on the device for EMV devices or on screen for PDCX devices.

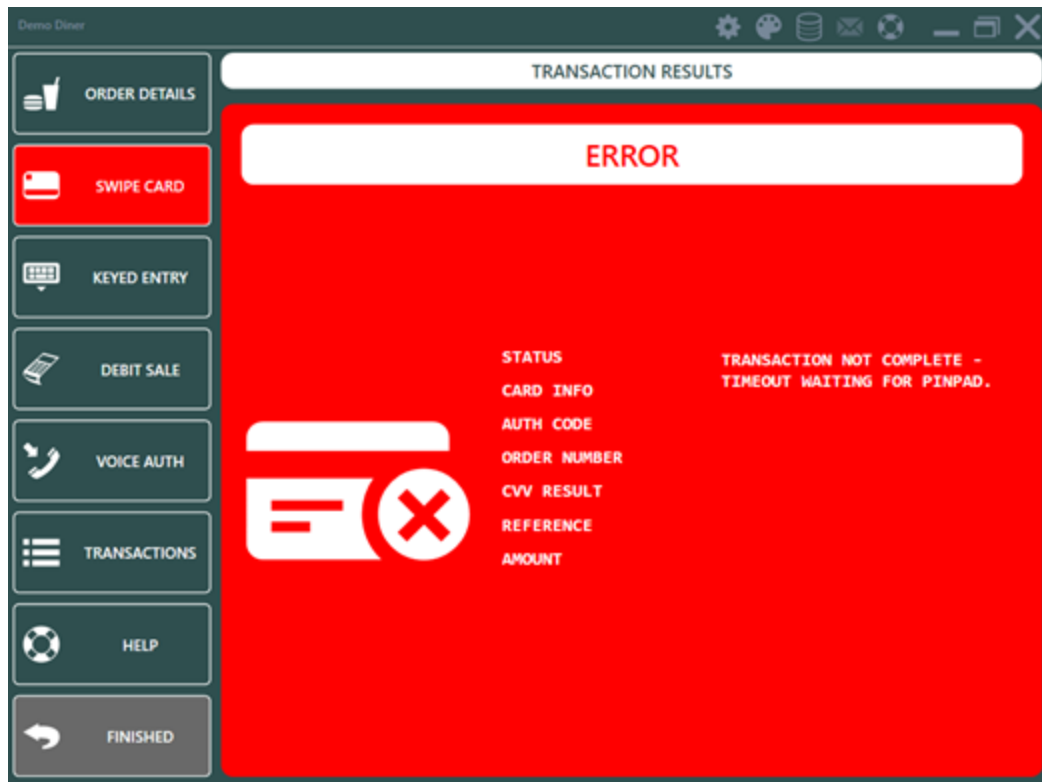


EMV Device

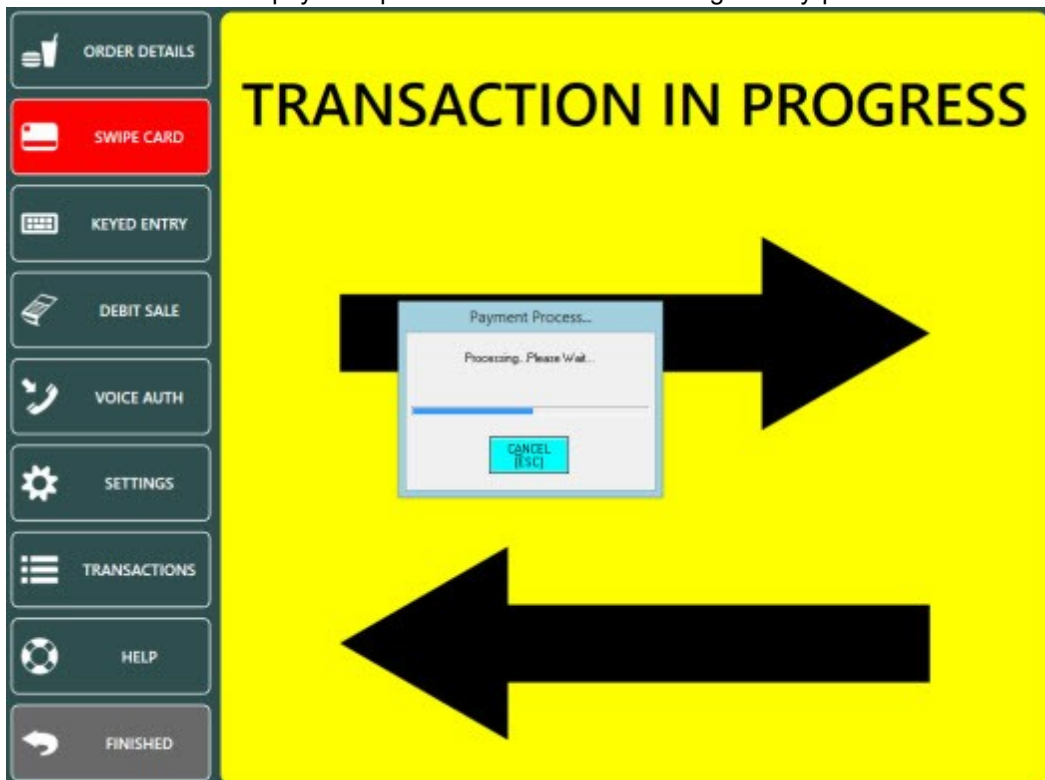


PDCX Device

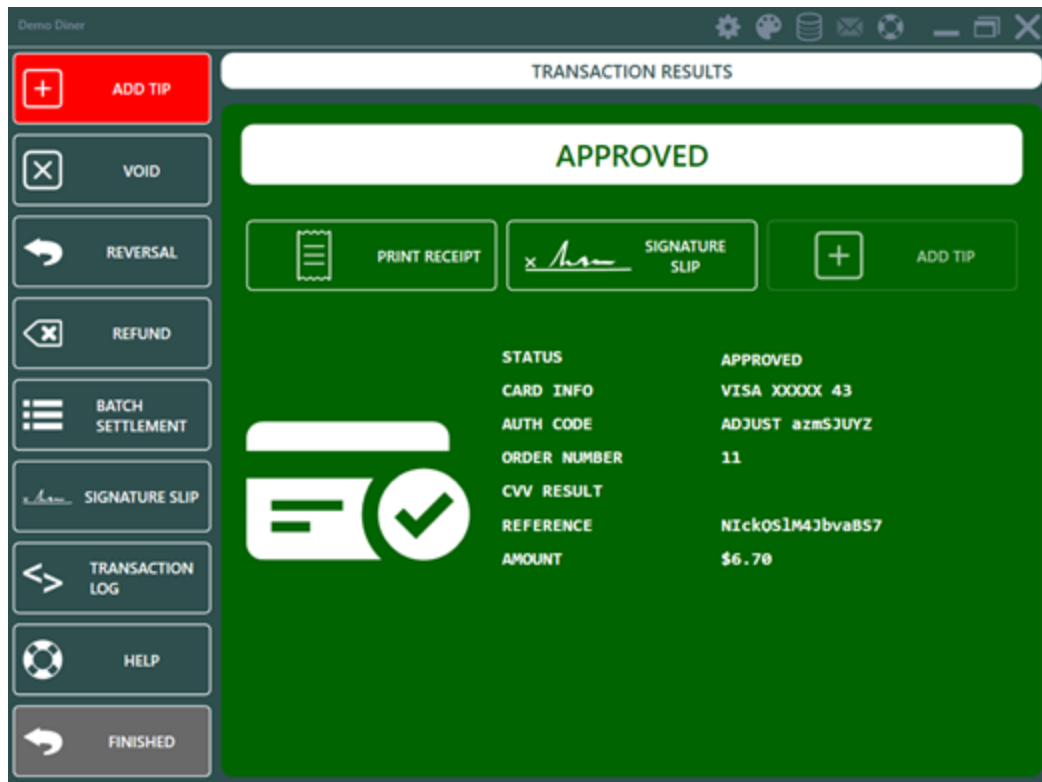
The transaction is canceled if the card is not swiped within 1 minute for EMV devices or 20 seconds or PDCX Devices.



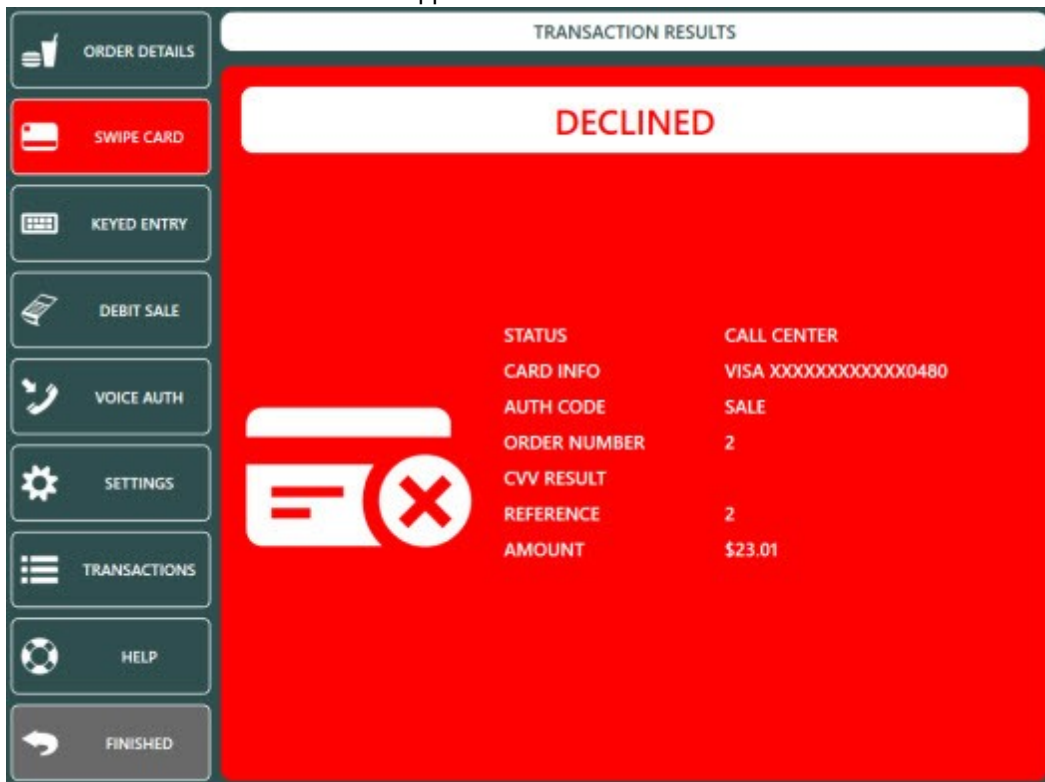
The transaction is sent to the server. EMV devices display the transaction progress on the device and the screen remains yellow until the transaction is processed. PDCX devices display the transaction progress on screen and the screen displays the "Processing...Please Wait" prompt is displayed until a response is received from the payment processor. Transactions are generally processed in 3-5 seconds.



A green background indicates a successful 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.



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.

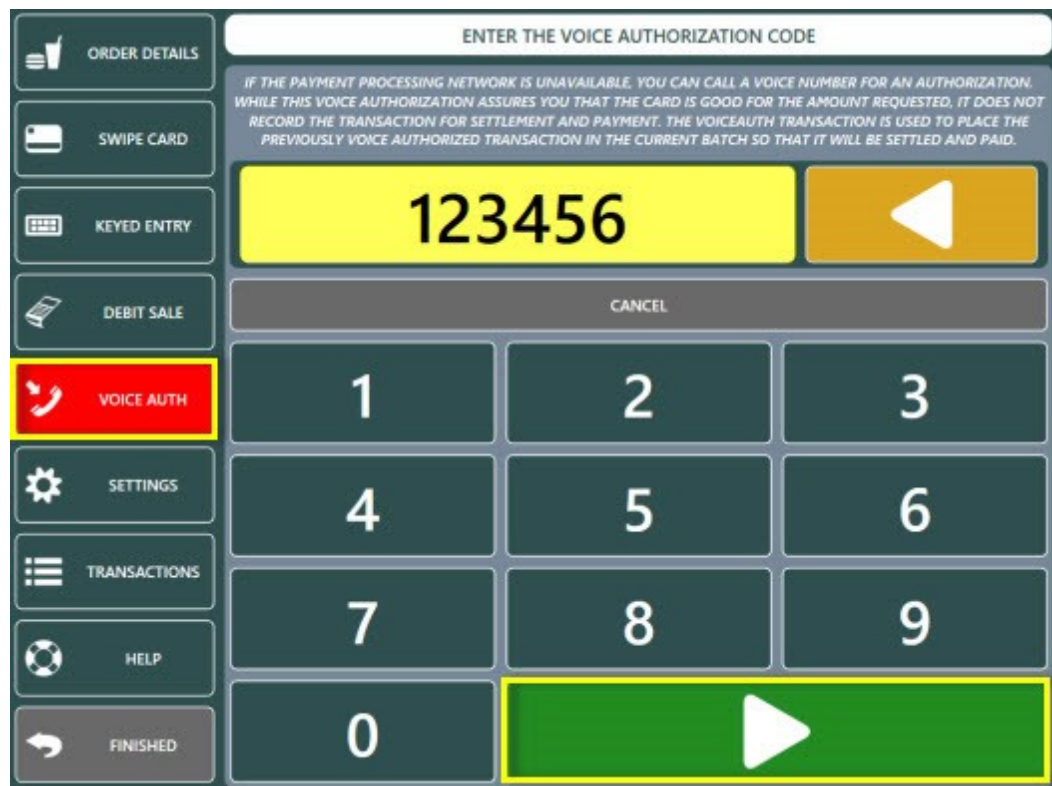
VOICE AUTH

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.



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

Enter the sale amount and press the green button to process the transaction.



ORDER DETAILS

SWIPE CARD

KEYED ENTRY

DEBIT SALE

VOICE AUTH

SETTINGS

TRANSACTIONS

HELP

FINISHED

ENTER THE VOICE AUTH CHARGE AMOUNT

\$8.02

CANCEL

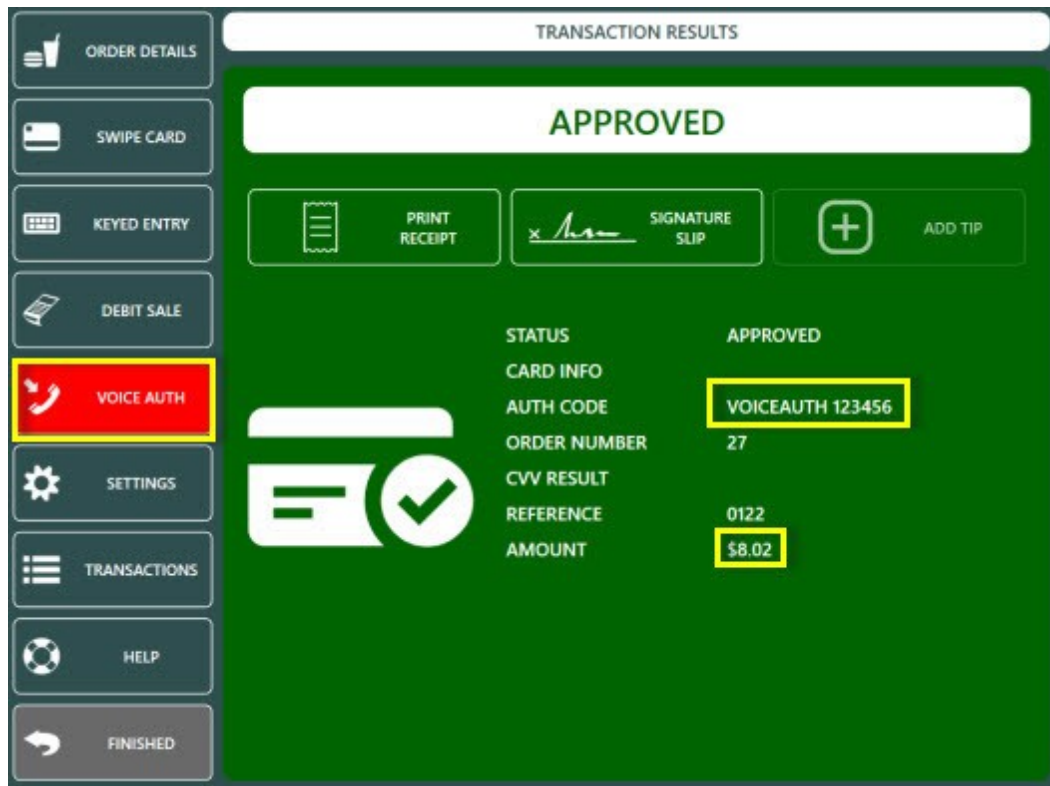
1 2 3

4 5 6

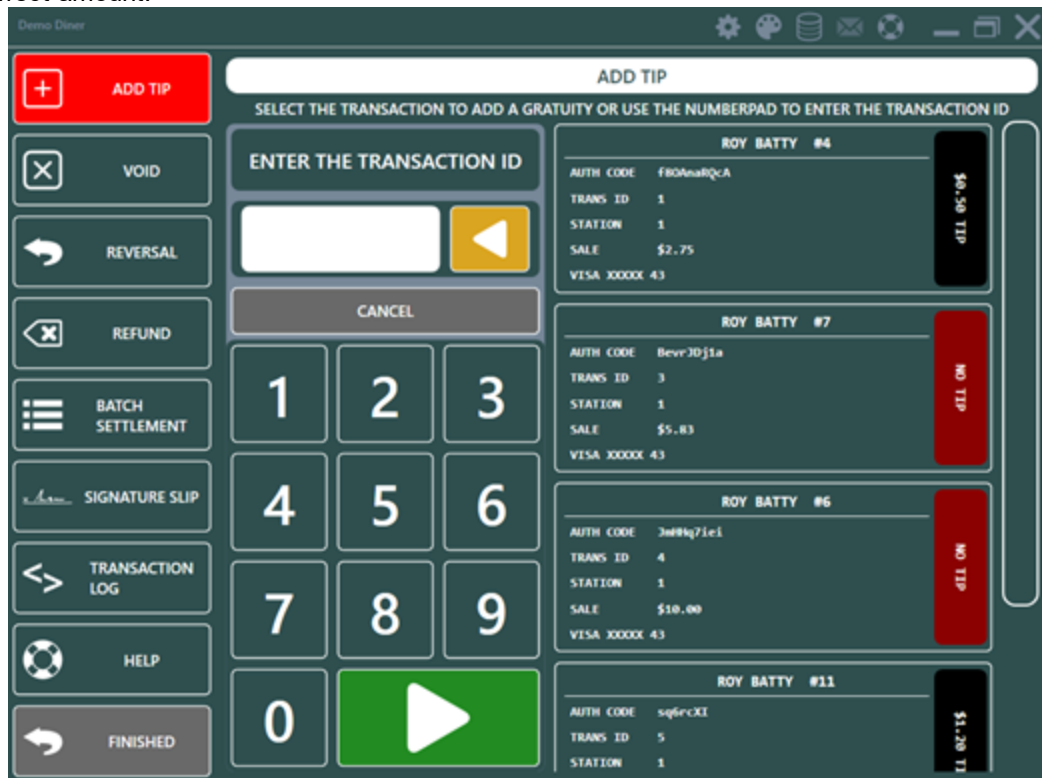
7 8 9

0

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.

**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.



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.

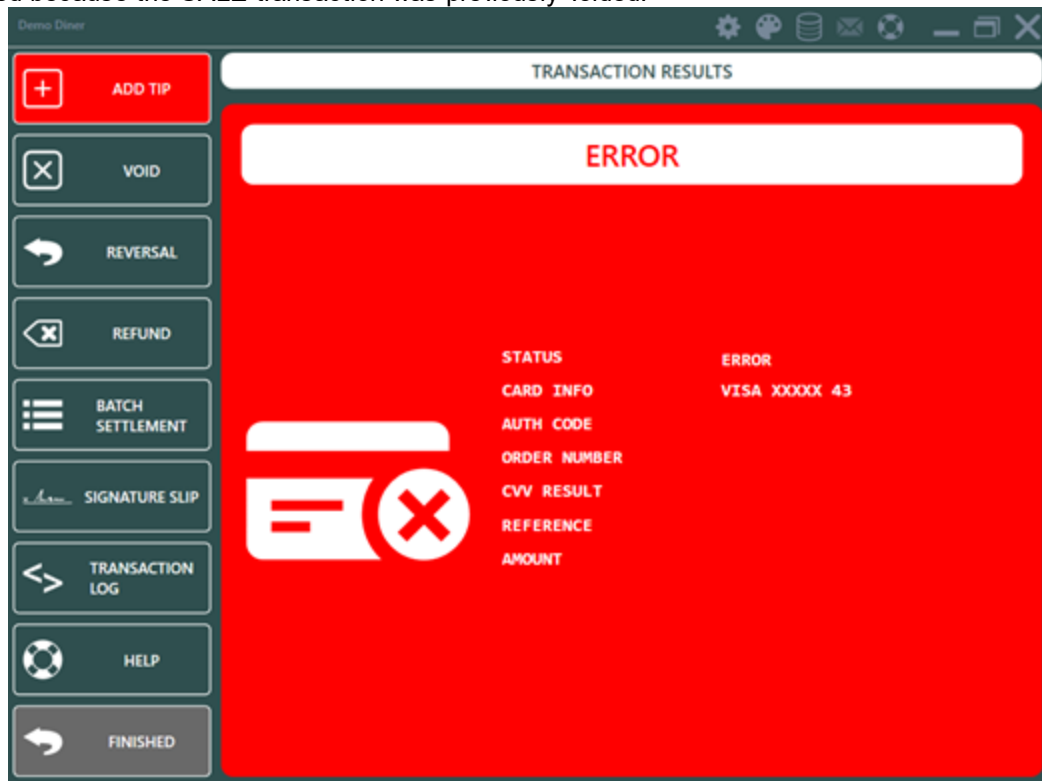
The screenshot shows the 'ENTER THE GRATUITY AMOUNT' screen. The top field displays '\$1.20'. Below the field is a numeric keypad with digits 0-9 and a green 'PROCESS' button. The left sidebar contains buttons for ADD TIP, VOID, REVERSAL, REFUND, BATCH SETTLEMENT, SIGNATURE SLIP, TRANSACTION LOG, HELP, and FINISHED.

Review the transaction information shown on the confirmation screen and press the green PROCESS ADD GRATUITY button to process the transaction.

The screenshot shows the 'CONFIRM THE TRANSACTION DETAILS TO PROCEED' screen. A large question mark icon is on the left. On the right, a table displays transaction details. At the bottom, there are 'CANCEL' and 'PROCESS ADD GRATUITY' buttons. The left sidebar is the same as the previous screen.

CONFIRM THE TRANSACTION DETAILS TO PROCEED	
TRANSACTION ID	5
CARD ISSUER	12/6/2022 4:27:24 AM
CARD HOLDER	VISA
ACCT NUMBER	XXXXXXXXXXXX0043
BAR TAB ID	0
CASHIER	ROY B
ORDER ID	11
TRANSACTION TYPE	SALE
SHEP	YES
AUTHORIZED AMOUNT	\$5.50
BALANCE DUE	\$0.00
GRATUITY	\$1.20

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.



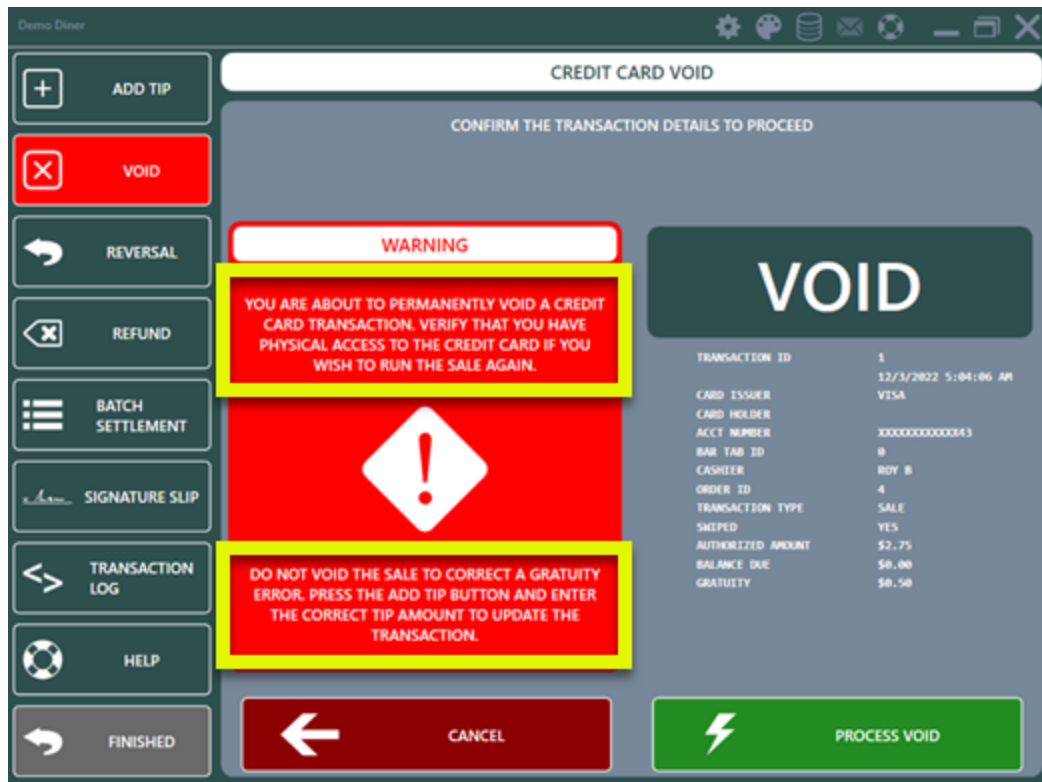
VOID

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, Dinerâ€™s Club, JCB or other supported card type). Preauth transactions cannot be voided.

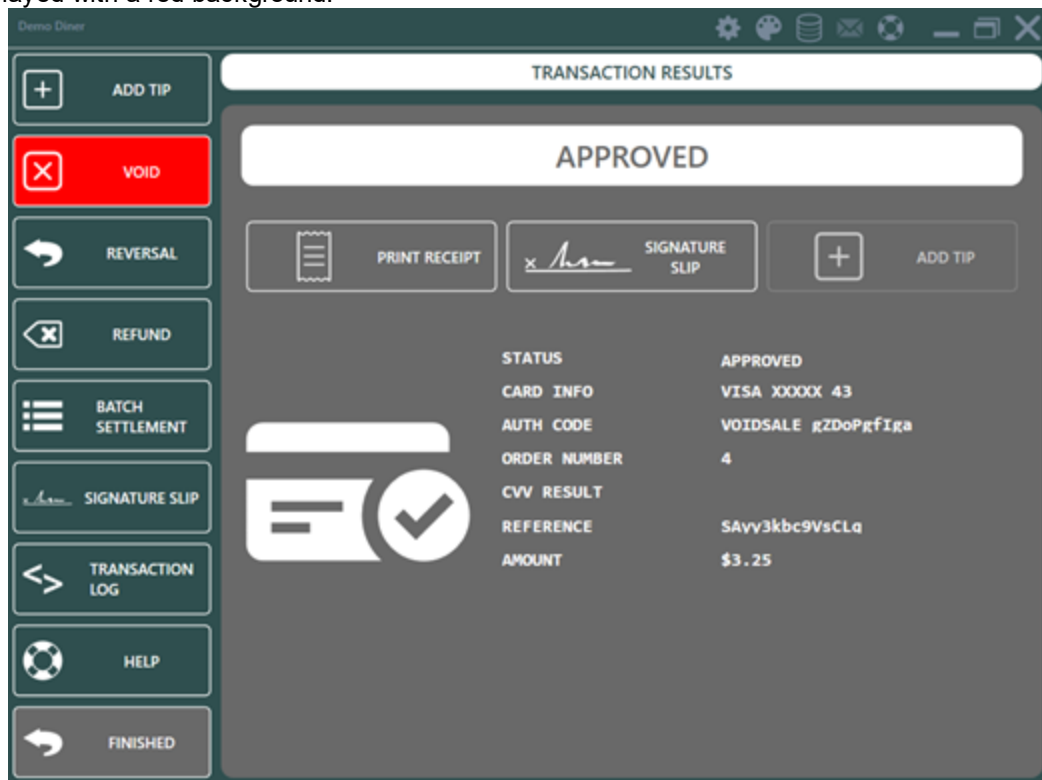
Warning: A credit card void is permanent and cannot be reversed

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.



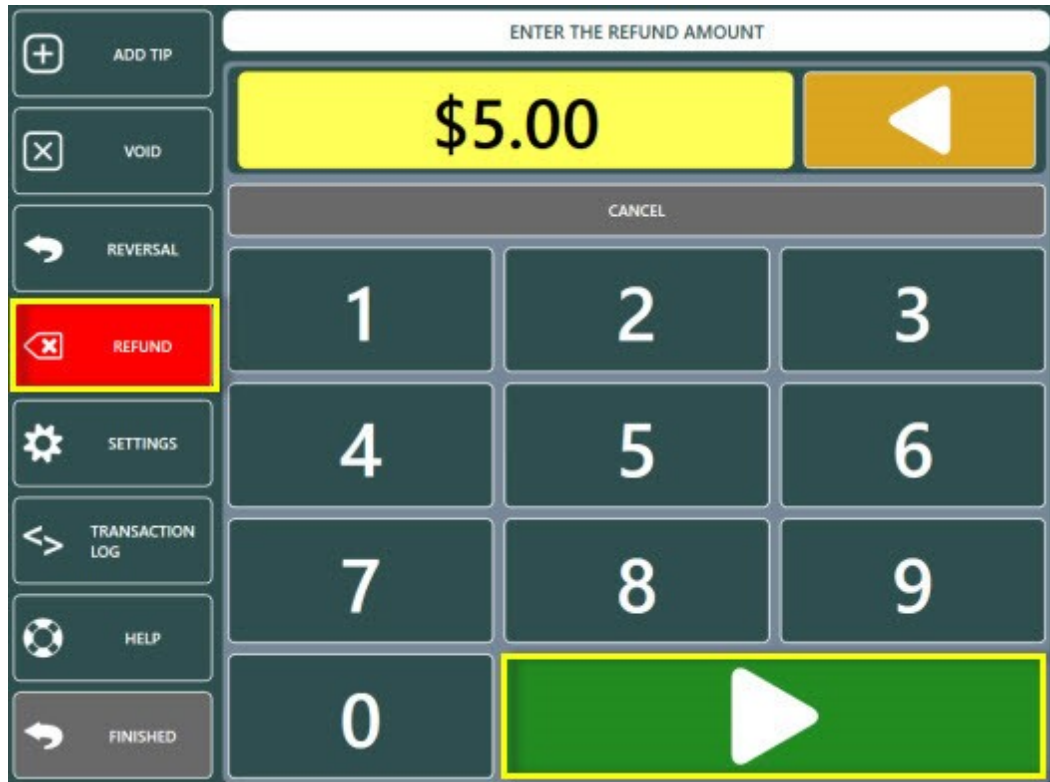
A successful VOID transaction is displayed with a gray background. An unsuccessful VOID transaction is displayed with a red background.



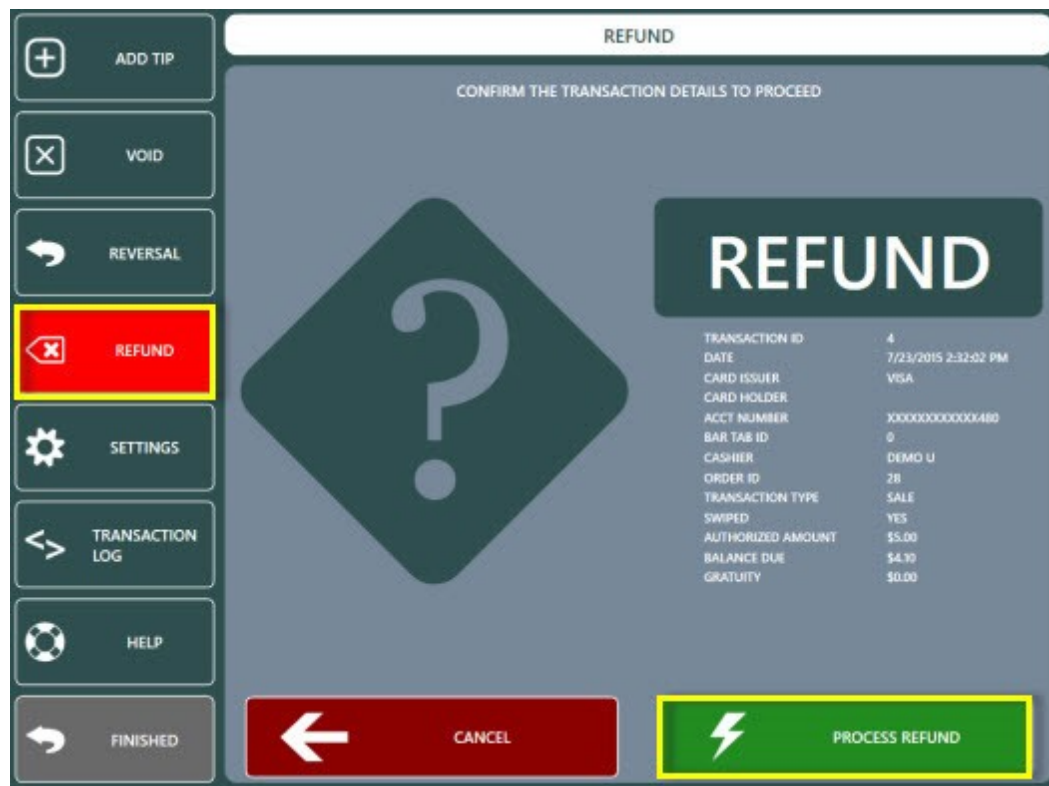
REFUND

The REFUND transaction type is used to process a return (Datacap NETePay refers to a refund as a RETURN transaction) to a credit card (VISA, MasterCard, American Express, Discover, Carte Blanche, Dinerâ€™s Club, JCB or other supported card type).

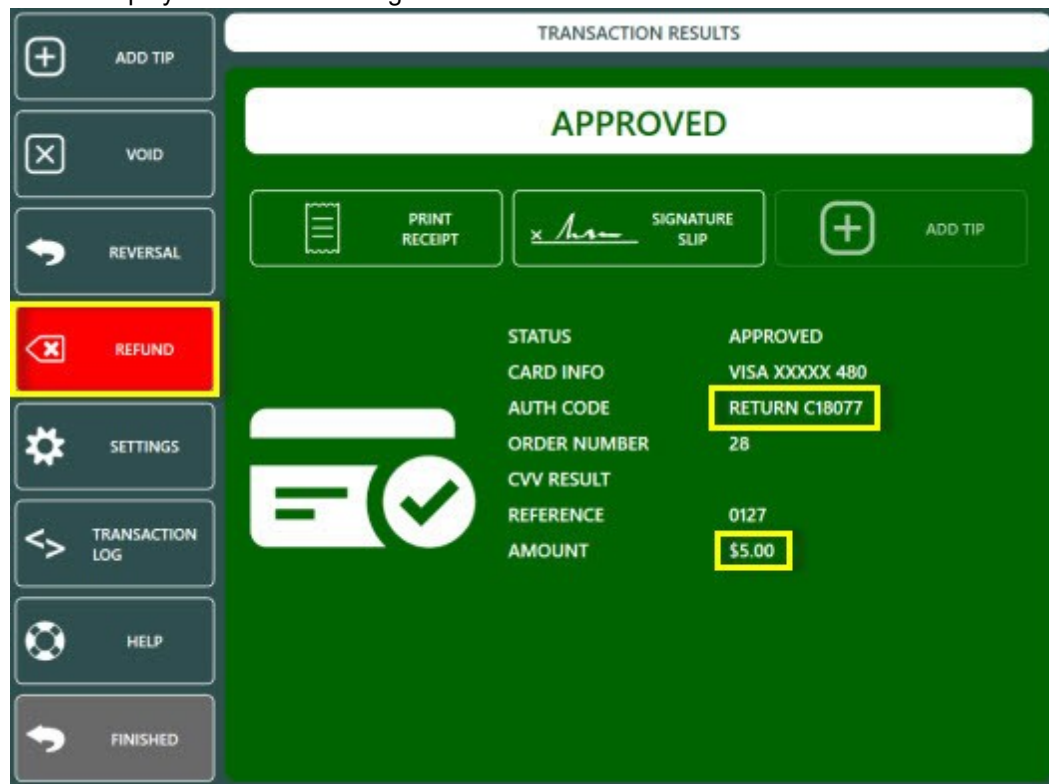
To start a refund transaction, recall the order and press the CREDIT button. Click Cancel on the card swipe prompt and press the REFUND button to enter the refund amount using the on-screen number pad.



Review the transaction information shown on the confirmation screen and press the green button to process the REFUND transaction.



A successful REFUND transaction is displayed with a green background. An unsuccessful REFUND transaction is displayed with a red background.



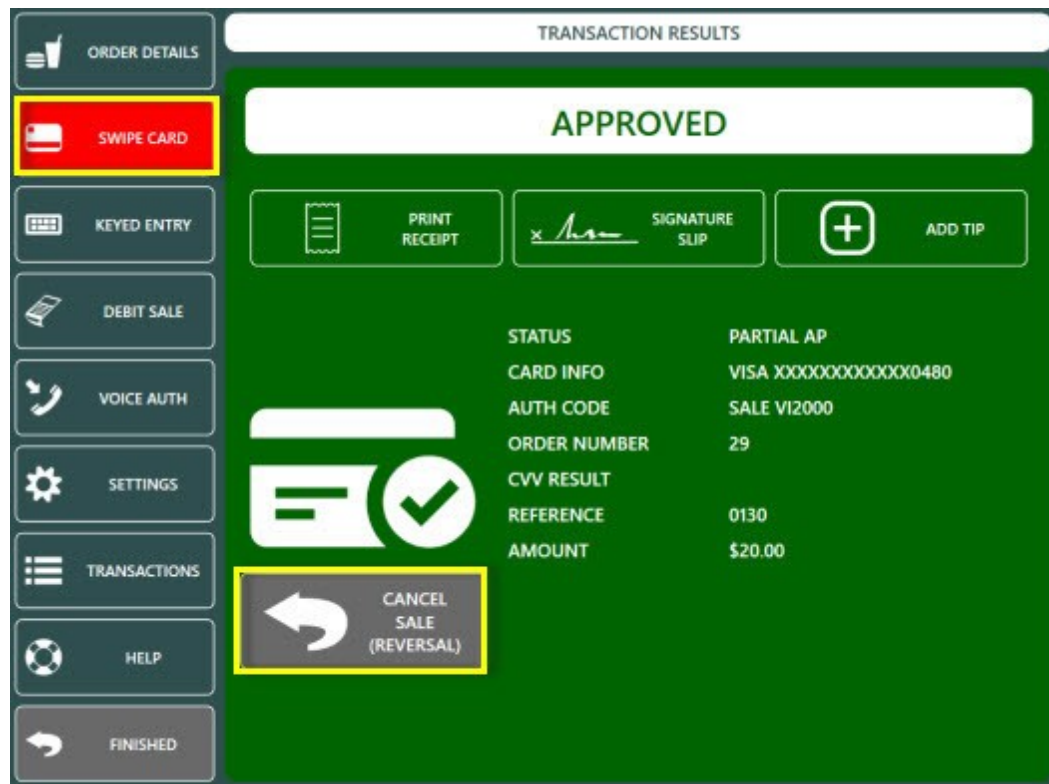
REVERSAL

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.

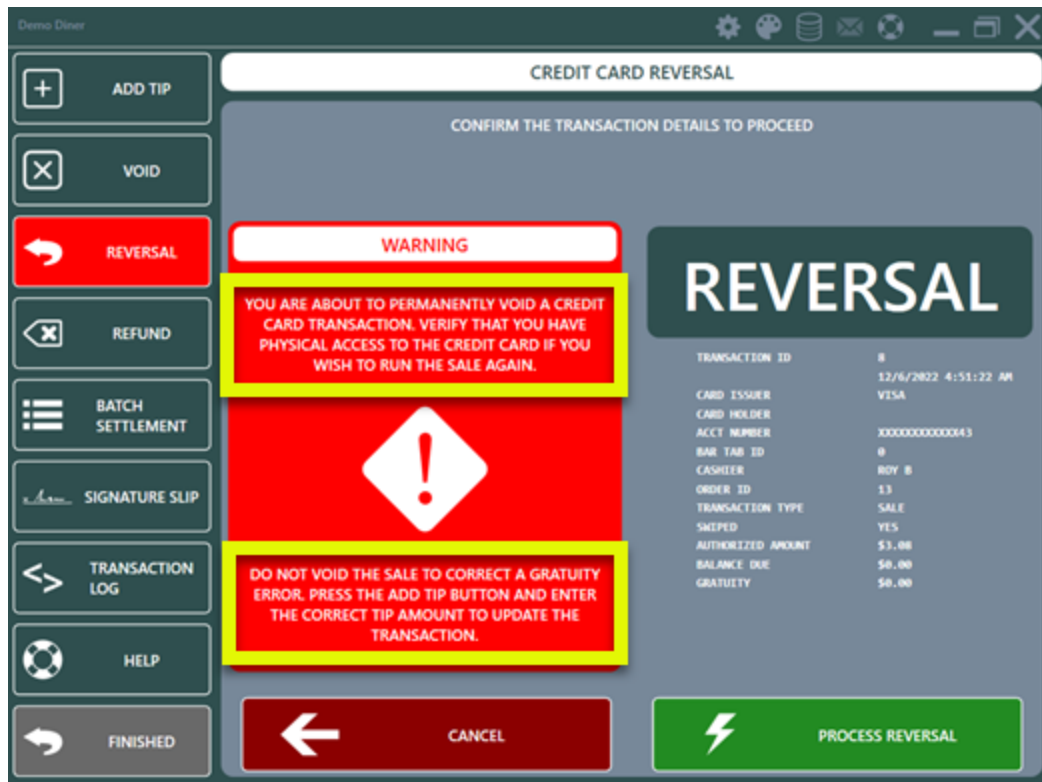
Warning: A credit card reversal is permanent and cannot be reversed

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.

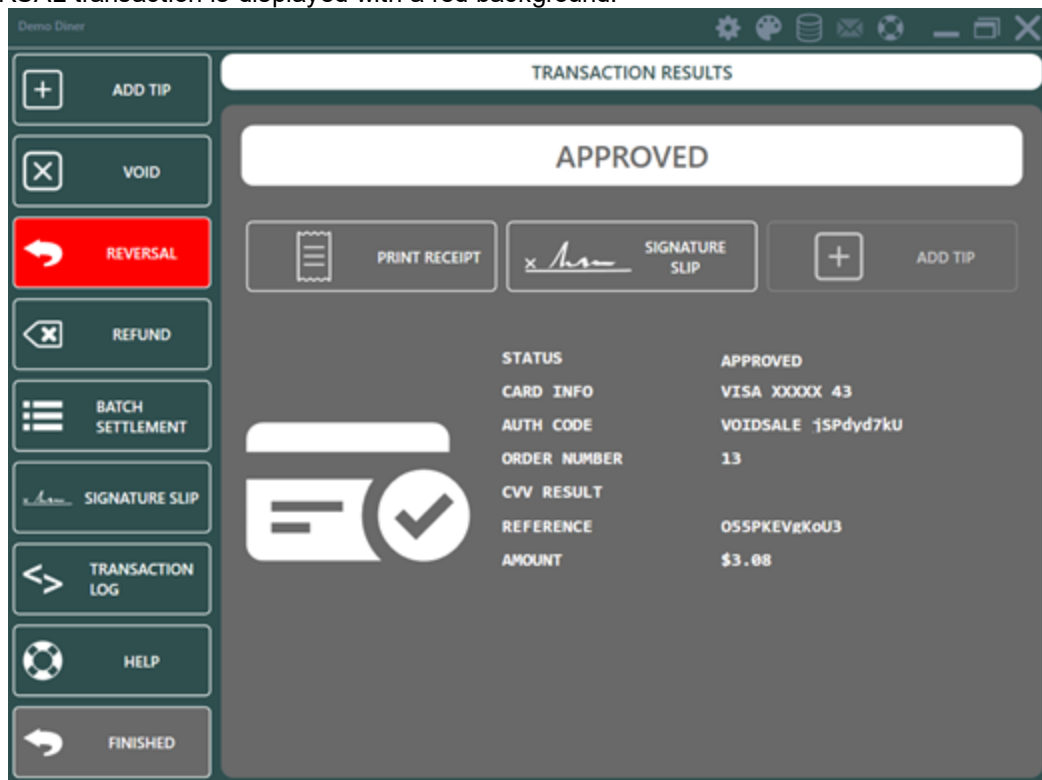
A typical scenario for a REVERSAL transaction is when a prepaid card is authorized for a partial amount of the balance due and the customer wishes to use a different card. A successful SALE transaction displays the REVERSAL button on the results screen. If the credit card screen is not open, login to 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.



Review the transaction information shown on the confirmation screen and press the green button to process the REVERSAL transaction.



A successful REVERSAL transaction is displayed with a gray background. An unsuccessful REVERSAL transaction is displayed with a red background.

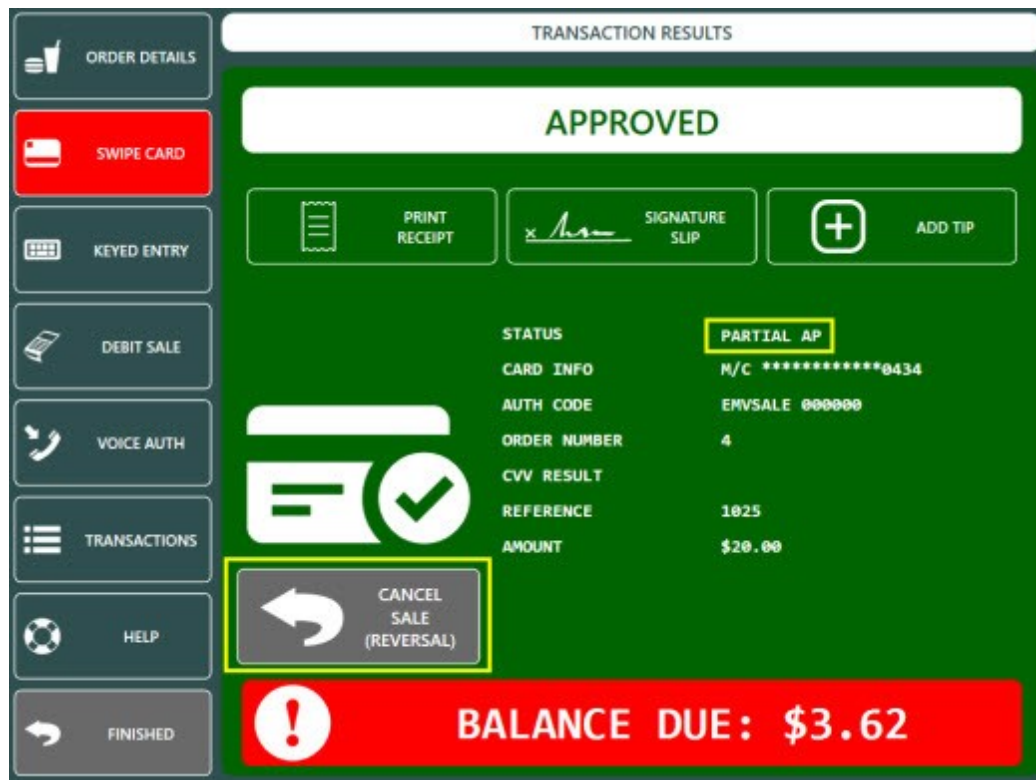


7.3.9 Partial Approvals

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.



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	XXXXXXXXXXXX000000000000
BAR 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.

TRANSACTION RESULTS

APPROVED

PRINT RECEIPT **SIGNATURE SLIP** **ADD TIP**

STATUS	APPROVED
CARD INFO	M/C XXXXX 434
AUTH CODE	VOIDSALE 000000
ORDER NUMBER	4
CVV RESULT	
REFERENCE	1025
AMOUNT	\$20.00

7.3.10 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 payment processor's web portal.

- [Incorrect gratuity amount added to a SALE / ADD GRATUITY transaction](#)^[146]
- [Incorrect gratuity amount added to a PREAUTH / CAPTURE transaction in the current batch](#)^[146]
- [A transaction has been Pre-Authorized but not captured. The user wants to void the transaction and start over](#)^[146]
- [A SALE / ADD GRATUITY transaction must be voided](#)^[146]
- [A PREAUTH / CAPTURE transaction must be voided](#)

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.

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 the payment processor's web portal 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 payment 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.**

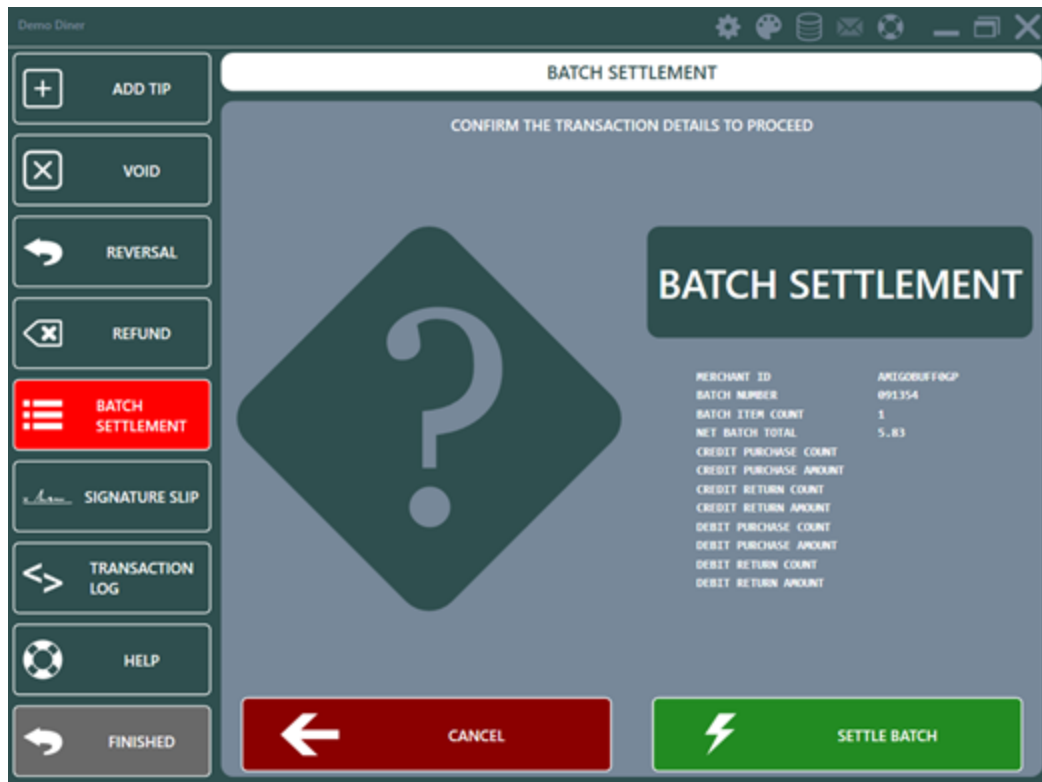
Issue: A **PREAUTH / CAPTURE** transaction must be permanently voided

Solution: Although the capture transaction can be voided, the original preauth transaction cannot be voided. Void the capture transaction and if the original preauth is not captured again, the funds will be released to the cardholder's account within a few days.

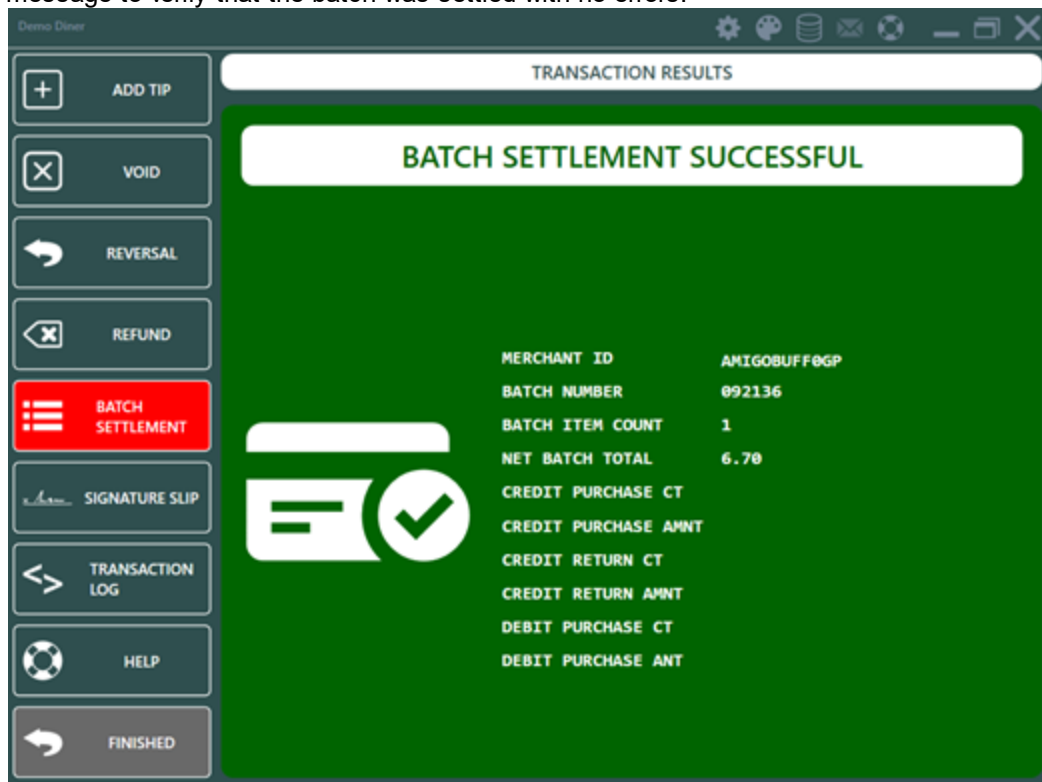
7.3.11 Batch Settlement

In most cases the batch is settled automatically by the payment processor at the same time each day. The batch can be manually settled as described below. Note that some payment processor do not support manual batch settlement with Datacap NETePay, in which case the payment processor's online portal can be used to view and manually settle the batch.

Open the credit cards screen and select BATCH SETTLEMENT to view the batch summary. The batch summary displays transactions that have been processed since the batch was last settled. The information is retrieved directly from the payment processor and is not stored in the POS database.



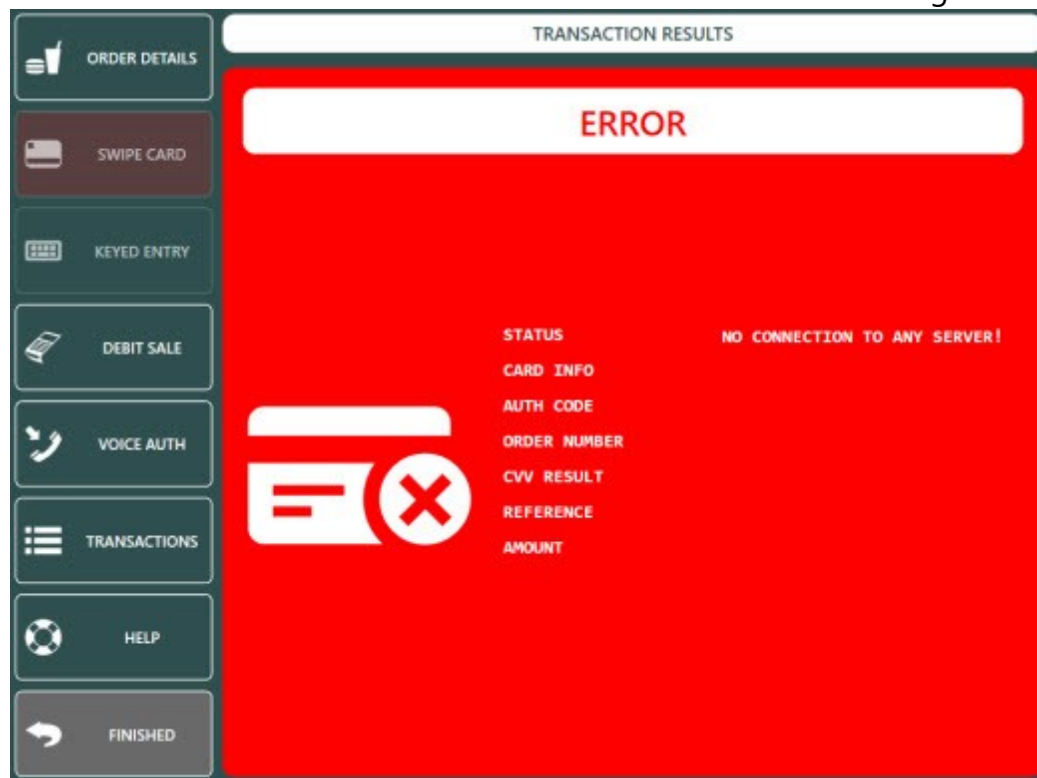
Press **SETTLE BATCH** to settle the batch. Allow a few seconds for the batch to settle and review the status message to verify that the batch was settled with no errors.



7.3.12 Troubleshooting

The following is a list of common errors that may occur when using the Datacap NETePay credit and gift card processing interface.

- **No Connection To Any Server:** Datacap NETePay is not running at the main pos station or an incorrect IP address is entered in the back office settings.



7.3.13 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.

The screenshot shows the 'TRANSACTION RESULTS' screen. The status is 'APPROVED' in a green banner. Below this, there are buttons for 'PRINT RECEIPT', 'SIGNATURE SLIP', and 'ADD TIP'. A card icon with a checkmark is displayed. To the right, transaction details are listed: STATUS (PARTIAL AP), CARD INFO (N/C *****0434), AUTH CODE (EMVSALE 000000), ORDER NUMBER (4), CVV RESULT, REFERENCE (1025), and AMOUNT (\$20.00). A 'CANCEL SALE (REVERSAL)' button with a left arrow icon is highlighted with a yellow box. At the bottom, a red banner displays 'BALANCE DUE: \$3.62' with an exclamation mark icon. The left sidebar contains buttons for ORDER DETAILS, SWIPE CARD, KEYED ENTRY, DEBIT SALE, VOICE AUTH, TRANSACTIONS, HELP, and FINISHED.

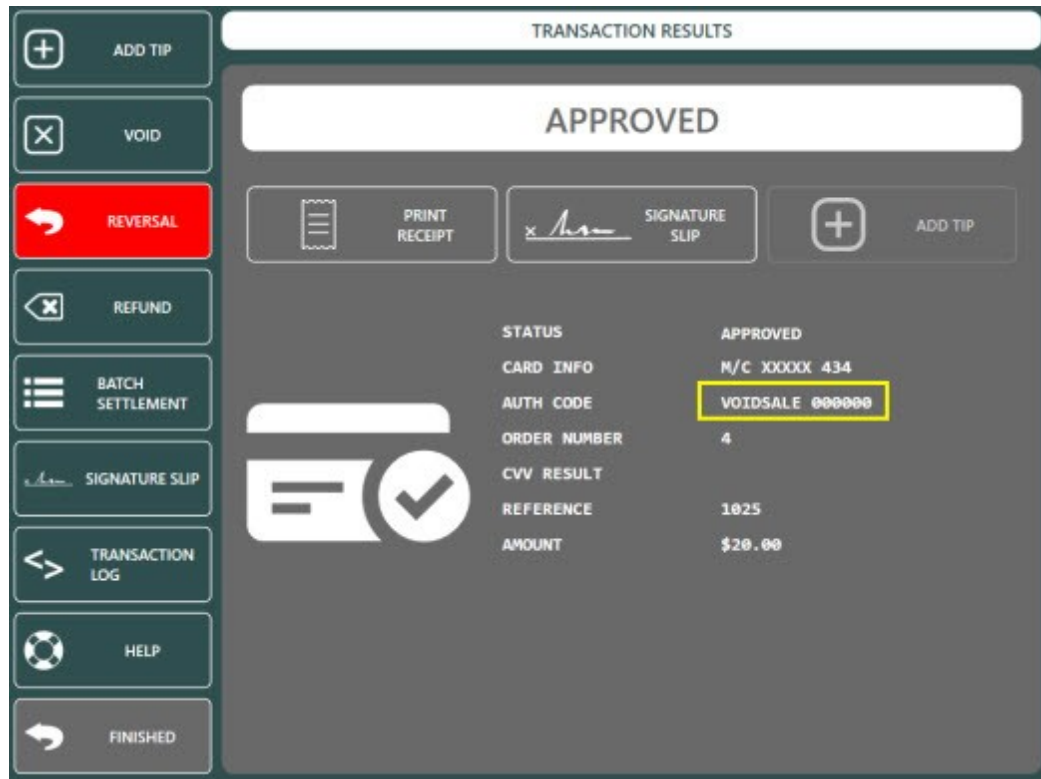
STATUS	PARTIAL AP
CARD INFO	N/C *****0434
AUTH CODE	EMVSALE 000000
ORDER NUMBER	4
CVV RESULT	
REFERENCE	1025
AMOUNT	\$20.00

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.

The screenshot shows the 'CREDIT CARD REVERSAL' screen. It prompts the user to 'CONFIRM THE TRANSACTION DETAILS TO PROCEED'. A large question mark icon is centered on the screen. To the right, transaction details for the reversal are listed: TRANSACTION ID (1), DATE (12/12/2016 6:15:43 AM), CARD ISSUER (N/C), CARD HOLDER (Test Card 10), ACCT NUMBER (XXXXXXXXXXXX0434), BAR TAB ID (0), CASHIER (DEMO U), ORDER ID (4), TRANSACTION TYPE (SALE), SWIPED (YES), AUTHORIZED AMOUNT (\$20.00), BALANCE DUE (\$3.62), and GRATUITY (\$0.00). At the bottom, there are two buttons: 'CANCEL' (red with a left arrow) and 'PROCESS REVERSAL' (green with a lightning bolt icon, highlighted with a yellow box). The left sidebar contains buttons for ADD TIP, VOID, REVERSAL, REFUND, BATCH SETTLEMENT, SIGNATURE SLIP, TRANSACTION LOG, HELP, and FINISHED.

TRANSACTION ID	1
DATE	12/12/2016 6:15:43 AM
CARD ISSUER	N/C
CARD HOLDER	Test Card 10
ACCT NUMBER	XXXXXXXXXXXX0434
BAR 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

The issuer returns an approval indicating that the transaction has been successfully voided.



7.4 Processing Transactions

Processing Credit Card Transactions in AmigoPOS using integrated processing

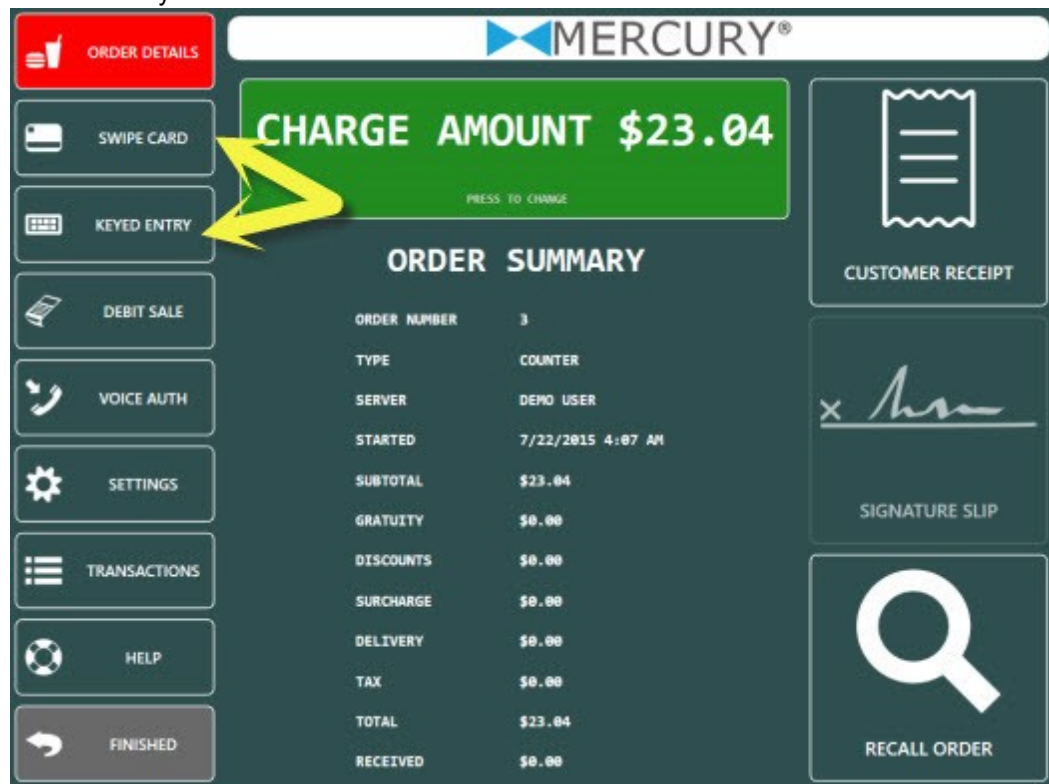
1. Select The Payment Type

To begin a credit card transaction, select the order on the main screen and press the **SETTLE CREDIT** payment button.



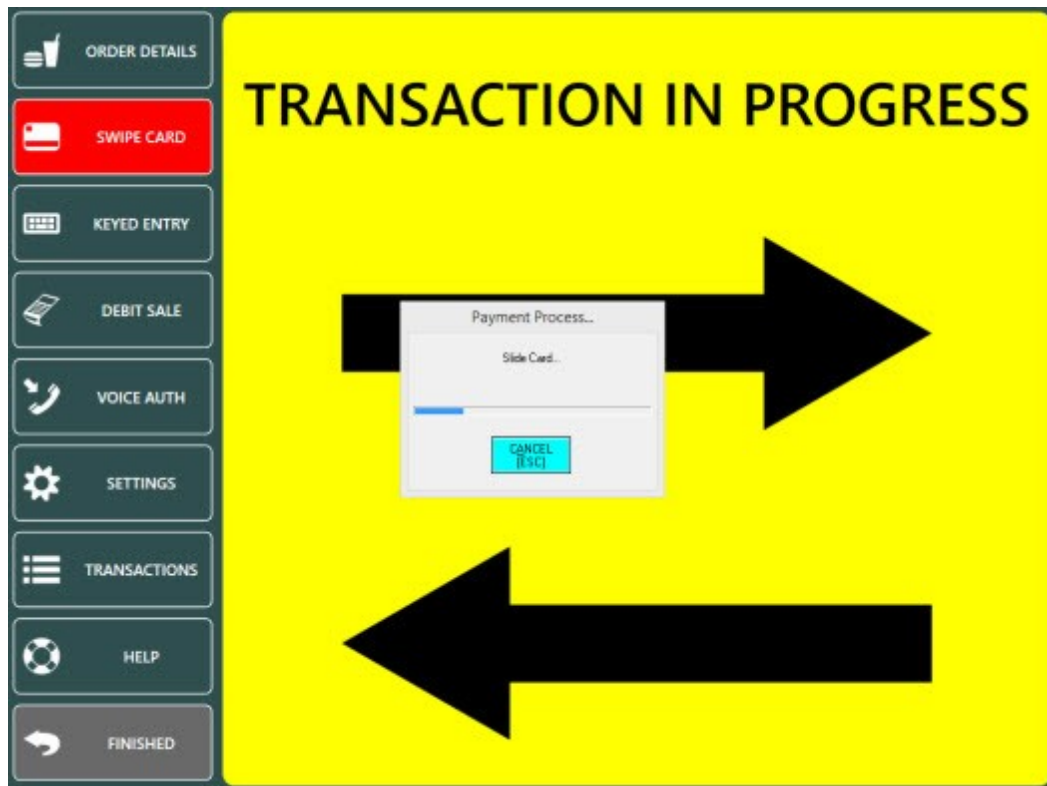
2. Select The Action

Select the card entry method to start the transaction.



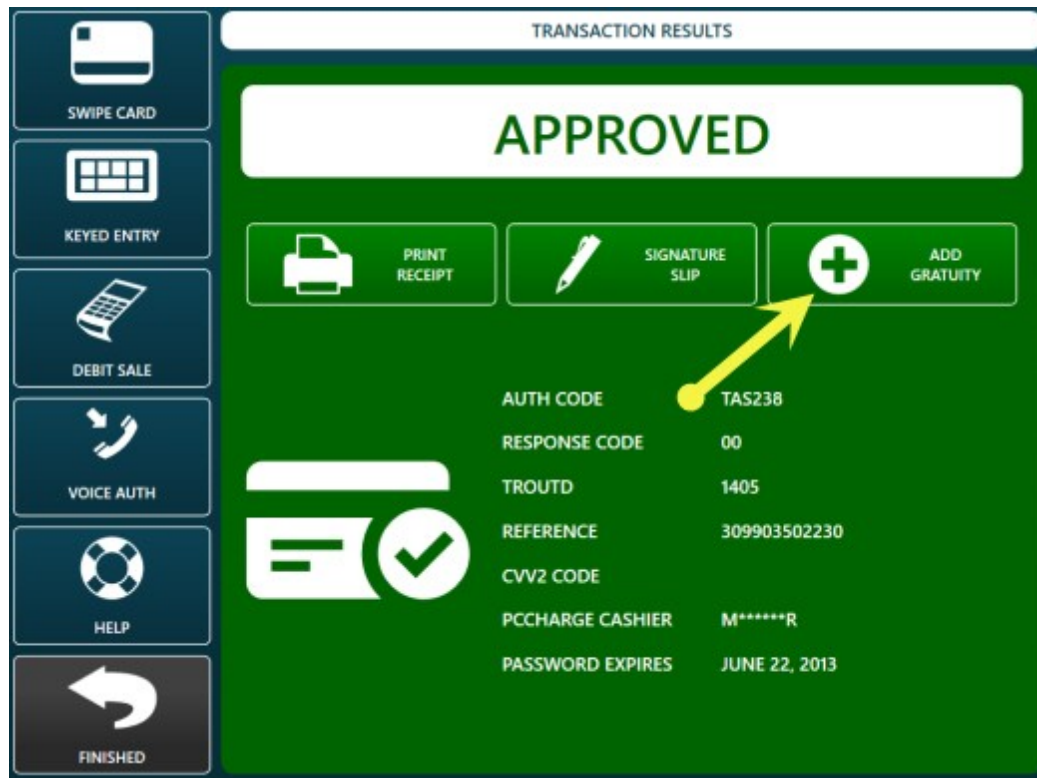
3. Swipe The Card

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](#)¹⁵². If the card cannot be swiped, the card number and expiration date must be entered manually, as described below.



4. 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.



5. 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.



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: XXXXXXXXXXXXXXXX01
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

Select the transaction or enter the transaction id using the on-screen number pad and press the green button to continue.

ORDER #	DESCRIPTION	SALE AMOUNT	CARD TYPE	STATUS
ORDER #3	DEMO U	SALE \$4.74	AMEX XXXXX1001	OPEN
ORDER #4	DEMO U	SALE \$4.09	VISA XXXXX6781	OPEN
ORDER #5	DEMO U	SALE \$5.72	M/C XXXXX6781	OPEN
ORDER #6	DEMO U	SALE \$11.55	M/C XXXXX6781	OPEN
ORDER #24	DEMO U	SALE \$4.80	VISA XXXXX1897	CAPTURED
ORDER #25	DEMO U	PREAUTH \$4.80	VISA XXXXX1897	OPEN
ORDER #1	DEMO U	PREAUTH \$6.10	VISA XXXXX1897	CAPTURED

Enter the gratuity amount and press the **ADD GRATUITY** button to complete the transaction.

ORDER #	DESCRIPTION	SALE AMOUNT	CARD TYPE	STATUS
ORDER #3	DEMO U	SALE \$4.74	AMEX XXXXX1001	OPEN
ORDER #4	DEMO U	SALE \$4.09	VISA XXXXX6781	OPEN
ORDER #5	DEMO U	SALE \$5.72	M/C XXXXX6781	OPEN
ORDER #6	DEMO U	SALE \$11.55	M/C XXXXX6781	OPEN
ORDER #24	DEMO U	SALE \$4.80	VISA XXXXX1897	CAPTURED
ORDER #25	DEMO U	PREAUTH \$4.80	VISA XXXXX1897	OPEN
ORDER #1	DEMO U	PREAUTH \$6.10	VISA XXXXX1897	CAPTURED

6. 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](#)^[205] 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).

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

PRINT

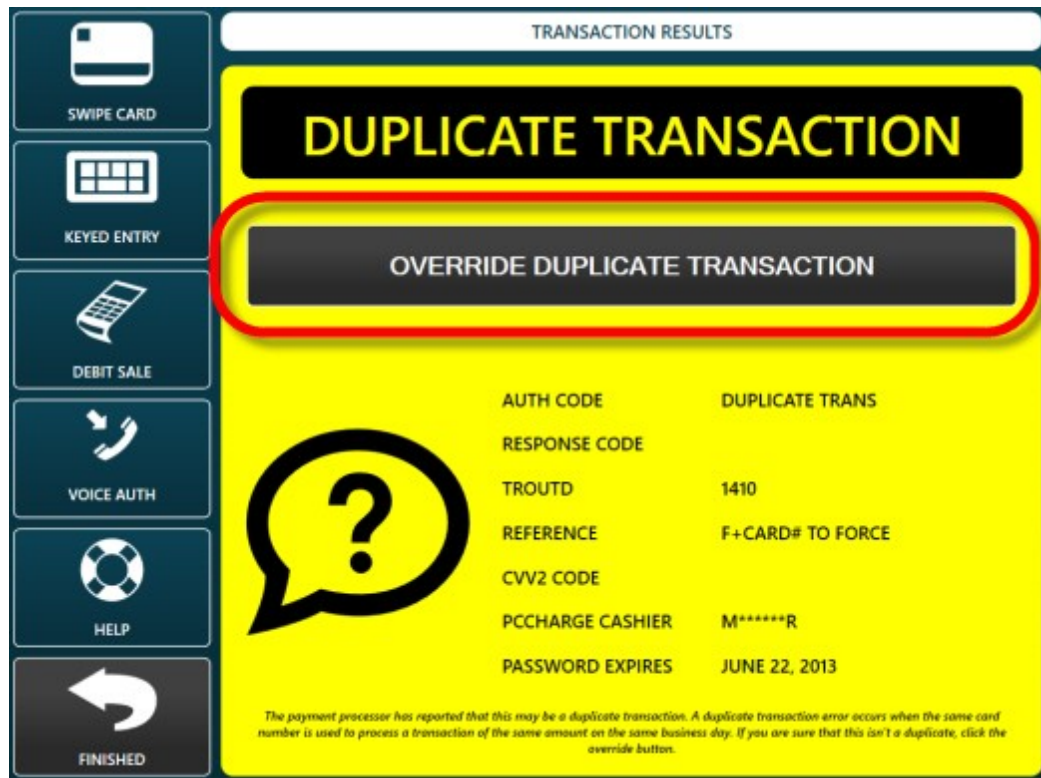
CURRENT DAY - ALL POS STATIONS

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
GRAND TOTAL	\$65.74

END OF DAY DISABLED
 *CAPTURE 1 OPEN PREAUTH
 *SETTLE 10 OPEN ORDERS

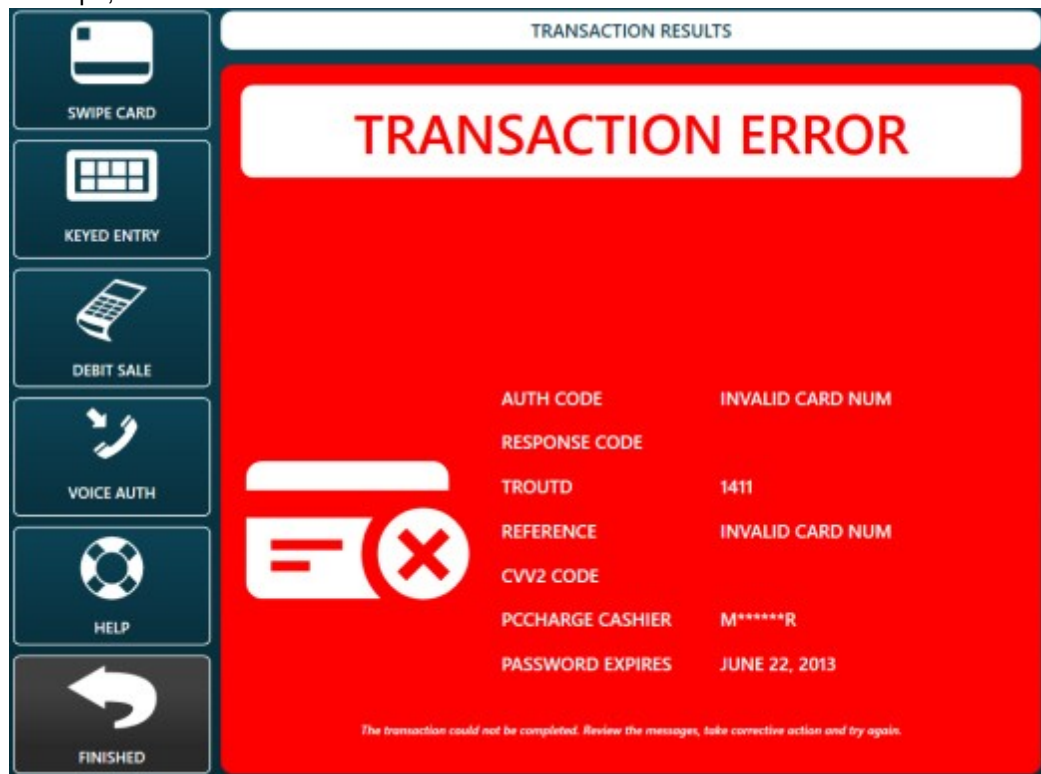
7. Duplicate Transaction Alert

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.



8. 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.



7.5 Processing Fees

A percentage can be added automatically to each Sale and subsequent Add Gratuity transaction to offset credit card processing fees. Open the credit card settings screen and set the value to a percentage value larger than zero. For example, enter 2.5 to apply a 2.5% processing fee to each credit card transaction. Note that this setting is used only when integrated credit card processing is enabled and has no effect when credit card transactions are entered manually on the order settlement screen.

Credit Card Settings

Credit Card Settings	
General Settings	
*Interface	Datacap NETePay
*Integration Type	Datacap NETePay PDCX
*Merchant ID	939650001885
*Terminal ID	01352621
*NETePay IP Address	127.0.0.1 Server Test
*Server Port	9000
*Batch Method	Time Initiated (Automatic)
*Card Reader	POS-X XM95U Device Test
*COM Port	9
*PIN Pad Type	None
*Device IP Address	
*Network Port	0
Automatic Card Swipe	No
Processing Fee (all stations)	
Processing Fee	3.5
Transaction Options (this station only)	
*Transaction Type	Sale/Add Gratuity
*Drink Sale/Draft/With Signature Cline	Both
Processing Fee	
Enter the percentage amount to add to the transaction total when processing a credit card payment. Set to zero to disable this setting.	

A message is displayed at the top of the credit card screen to remind the cashier that a fee is added automatically to each credit card transaction. A message should also be added to the bottom of the [customer receipt](#)^[19] and credit card [signature slip](#)^[100].

My Restaurant 3/14/2021 9:17 AM

3.5% PROCESSING FEE AUTOMATICALLY ADDED TO CREDIT CARD TRANSACTIONS

CHARGE AMOUNT \$2.75

PRESS TO CHANGE

\$10 \$50 \$75 \$100

BAR TAB BAR TAB BAR TAB BAR TAB

ORDER SUMMARY

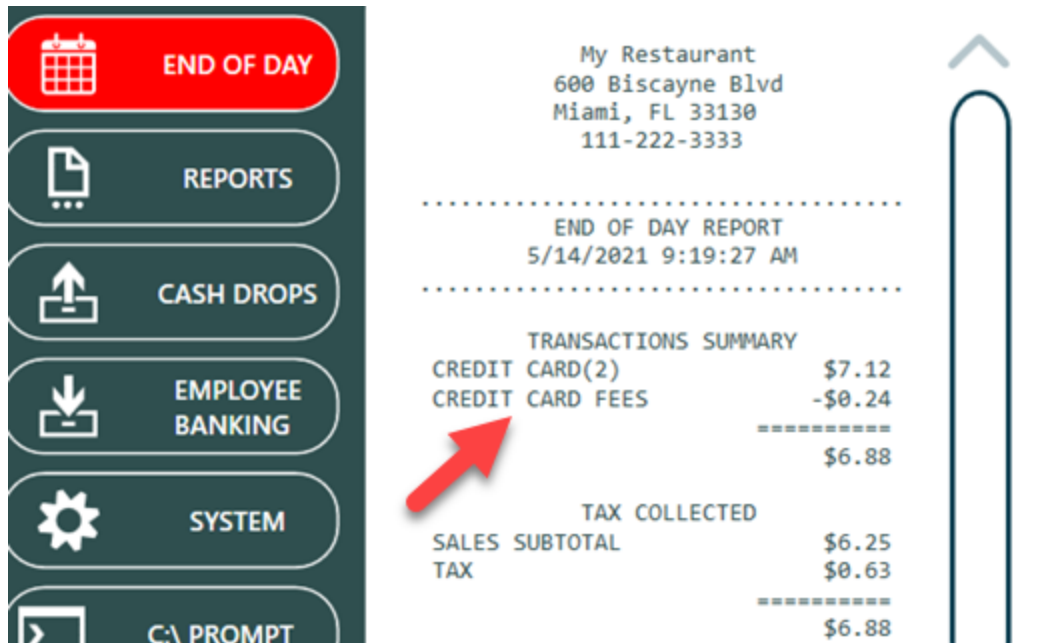
ORDER NUMBER	1
TYPE	COUNTER
SERVER	DEMO USER
STARTED	5/14/2021 9:15 AM
SUBTOTAL	\$2.50
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.25
TOTAL	\$2.75
RECEIVED	\$0.00

PRINT RECEIPT

SIGNATURE SLIP

RECALL ORDER

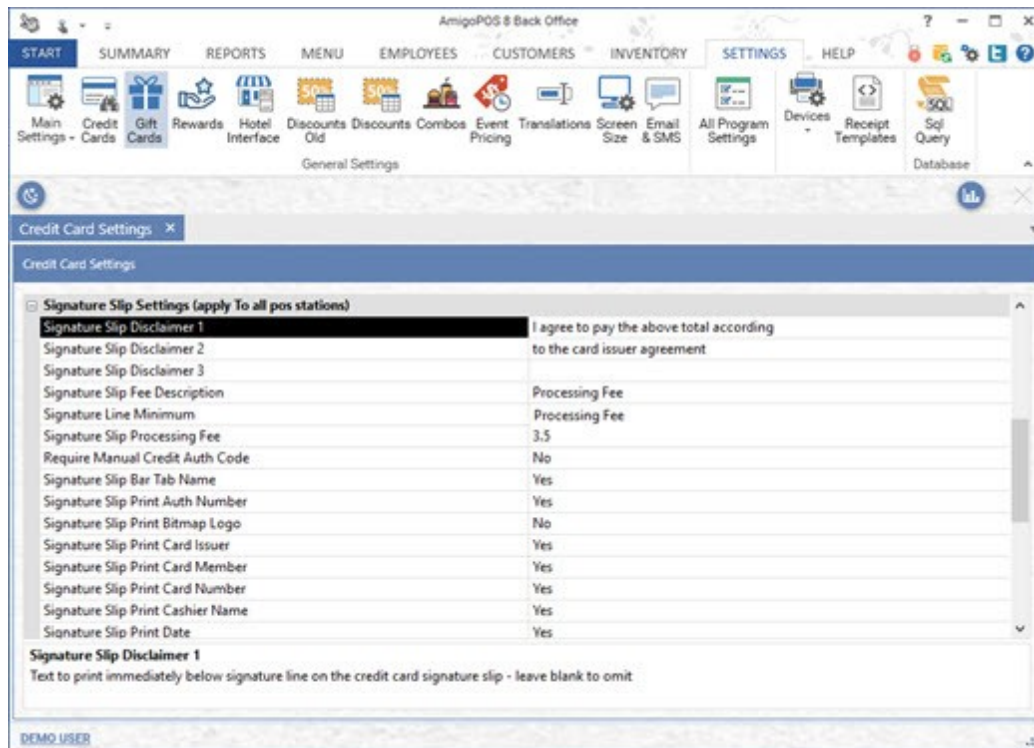
The fees collected are deducted from the transactions total on the end of day report so that the transactions and sales totals remain balanced.



7.6 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 capture 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.



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 Slip Disclaimer 1:** text to print immediately below the signature line on the credit card signature slip - leave blank to omit.
- **Signature Slip Disclaimer 2:** text to print on 2nd line below the signature line on the credit card signature slip - leave blank to omit.
- **Signature Slip Disclaimer 3:** text to print on 3rd line below the signature line on the credit card signature slip - leave blank to omit.
- **Signature Slip Fee Description:** text to print before processing fee (15 characters maximum). The fee must be set to a value larger than zero to display the text.
- **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 Processing Fee:** if the payment processor automatically adds a fee, set to value to the fee percentage to display on the signature slip (for example, if the fee is 3.5%, enter 3.5). This value does not affect pos reports or end of day.

- **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.

7.7 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.

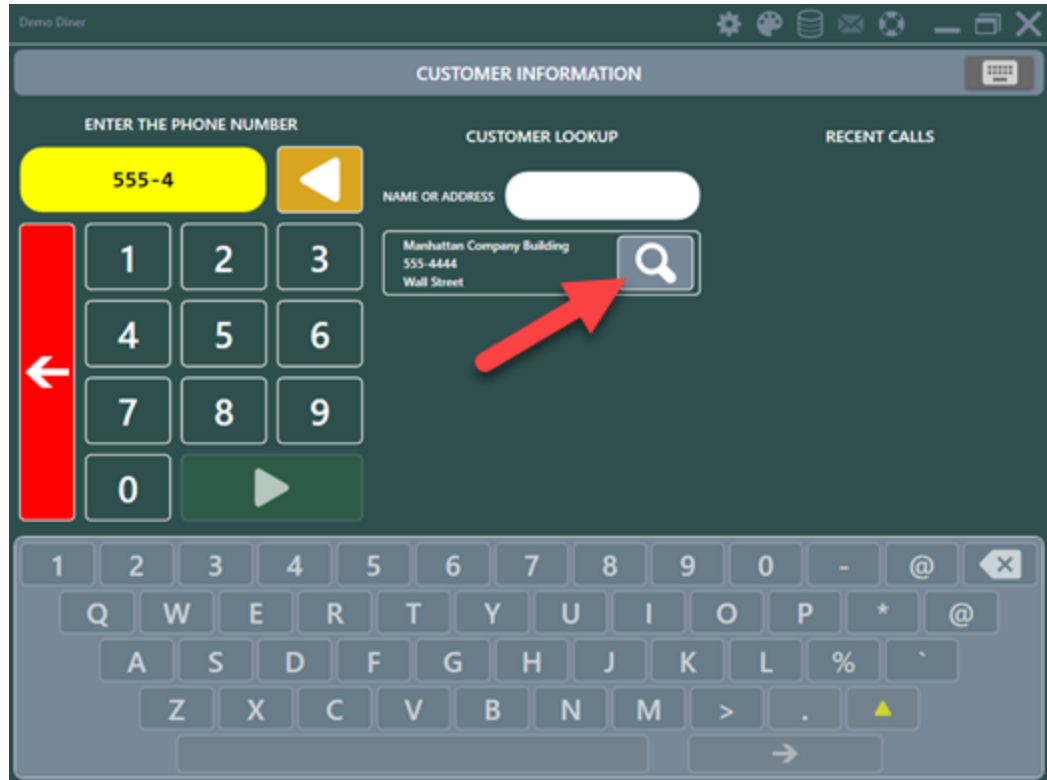
CREDIT CARD SIGNATURE SLIP	
CONFIRM THE TRANSACTION DETAILS TO PROCEED	
SIGNATURE SLIP	
TRANSACTION ID	18
DATE	9/8/2015 2:14:55 PM
CARD ISSUER	AMEX
CARD HOLDER	
ACCT NUMBER	XXXXXXXXXXXX8431
BAR TAB ID	0
CASHIER	
ORDER ID	18
TRANSACTION TYPE	SALE
SWIPED	YES
AUTHORIZED AMOUNT	\$1.69
BALANCE DUE	\$0.00
GRATUITY	\$0.00

Customers

8 Customers

8.1 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.

Demo Diner

CUSTOMER INFORMATION

PHONE: 555-4444

ALTERNATE PHONE

LAST NAME: Manhattan Company Building

FIRST NAME

ADDRESS: Wall Street

DELIVERY CHARGE: North End (\$2.20) Web Order (\$2.50) Free Web Order (FREE) Downtown (\$2.75) West Side (\$1.00) No Charge

LOCATION NAME: Wall Street

STREET NUMBER: 40

STREET: Wall Street

ADDRESS LINE 2

ADDRESS LINE 3

ADDRESS NOTES

Navigation Bar: CANCEL, CHANGE, SUMMARY, ORDERS, LOYALTY, ROUTE, MAP, EMAIL, BLOCK, CONTINUE

8.2 Customer Email

The customer email utility is intended to send bulk emails based on customizable HTML templates to one or more recipients.

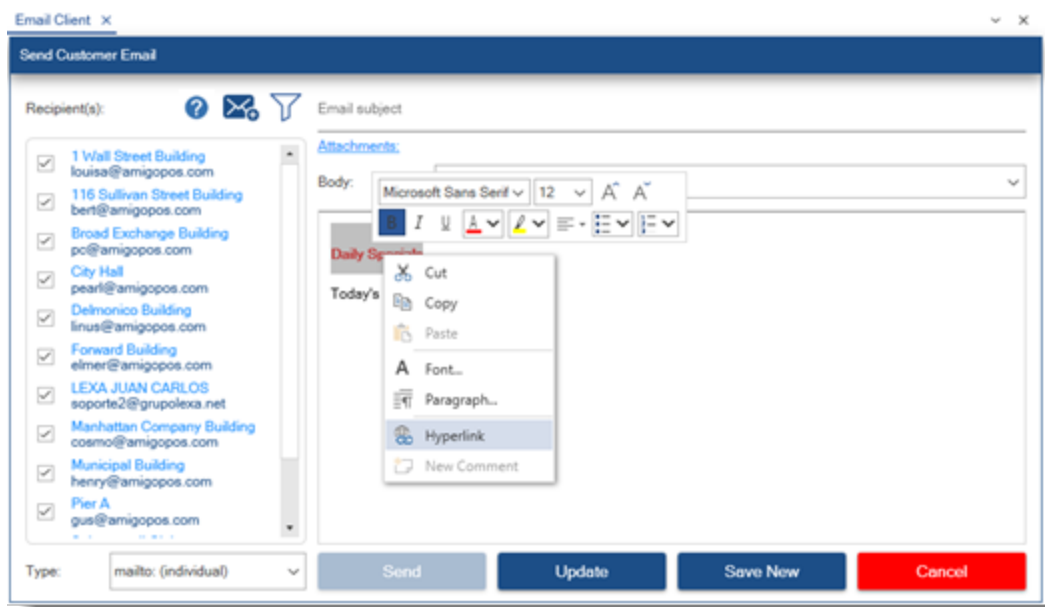
- [Email Settings](#) ¹⁶⁷
- [HTML Templates](#) ¹⁶⁷
- [Email List](#) ¹⁶⁸
- [Filters](#) ¹⁶⁹
- [Message Type](#)

Email Settings

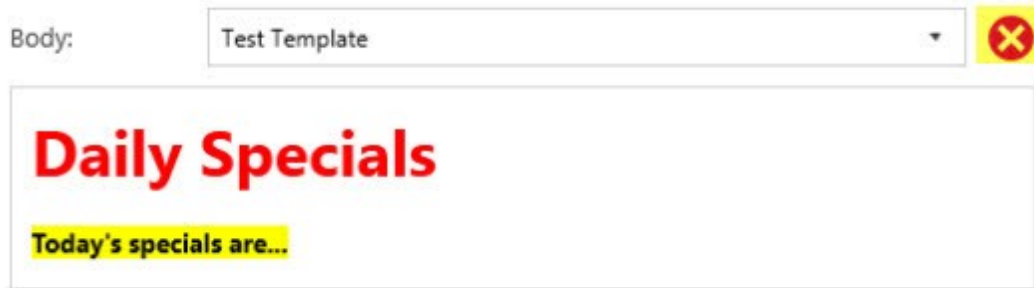
Verify that the [cloud service settings](#) ⁴²⁴ are correct in the data service application.

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.



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. 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.

Primary 111-2222 North End \$2.20 (\$25.00 FREE)

LAST NAME FIRST NAME

ADDRESS

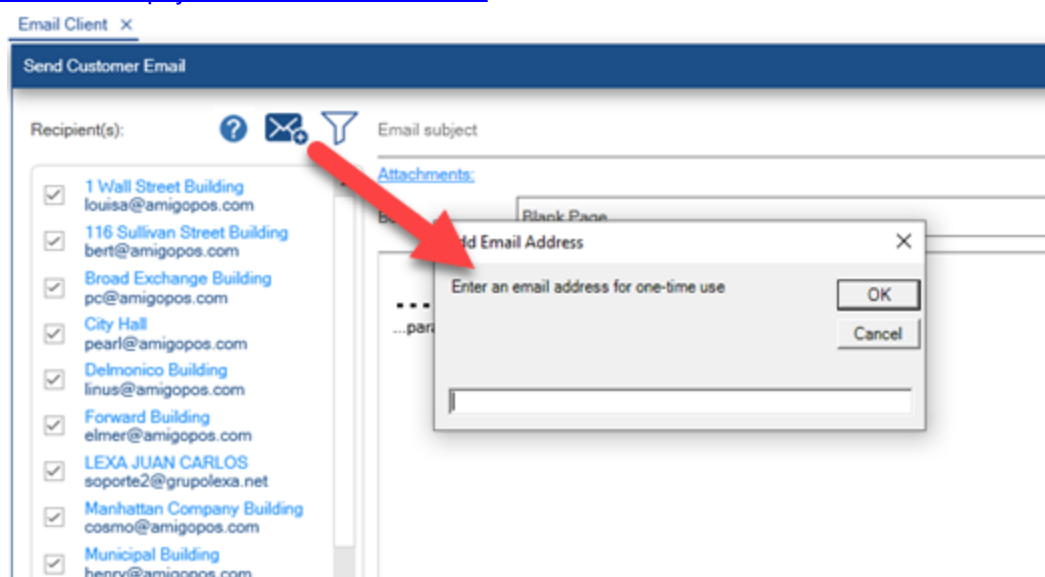
ADDRESS 2

CITY/STATE/ZIP

NOTES

EMAIL TAXABLE ☐

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

Send Customer Email

Recipient(s):

- ☒ 1 Wall Street Building
louisa@amigopos.com
- ☒ 116 Sullivan Street Building
bert@amigopos.com
- ☒ Broad Exchange Building
pc@amigopos.com
- ☒ City Hall
pearl@amigopos.com
- ☒ Delmonico Building
linus@amigopos.com
- ☒ Forward Building
elmer@amigopos.com
- ☒ LEXA JUAN CARLOS
soporte2@grupolexa.net
- ☒ Manhattan Company Building
cosmo@amigopos.com
- ☒ Municipal Building
henry@amigopos.com
- ☒ Pier A
gus@amigopos.com

Type: mailto: (individual)

Customer Since: All 6/16/2023

Last Order: All 6/16/2023

Total Spent: All 0.00

Order Count: All 0

Average Order: All 0.00

Minimum Order: All 0.00

Maximum Order: All 0

Loyalty Bonus: All 0

Message Type

Email can be sent using any of the following methods:

- **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](#)^[424] 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](#)^[424] and all recipients are listed in the bcc: field. This method does not allow each recipient to view other recipients.

116 Sullivan Street Building
bert@amigopos.com

Broad Exchange Building
pc@amigopos.com

City Hall
pearl@amigopos.com

Delmonico Building
linus@amigopos.com

Forward Building
elmer@amigopos.com

LEXA JUAN CARLOS
soporte2@grupolexa.net

Manhattan Company Building
cosmo@amigopos.com

Municipal Building
henry@amigopos.com

Pier A
gus@amigopos.com

Type: mailto: (individual)

Send Update

...heading...
...paragraph...

Customer Accounts

9 Customer Accounts

9.1 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 customer 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 customer 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 customer account can be disabled by checking the box
- **Void Reason:** Optionally add a text memo with the reason that the customer account is disabled

The summary for any customer 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 customer account can be deleted by clicking the delete button next to the account info. To prevent errors, only customer accounts with no active transactions can be deleted. Each individual transactions must be voided or deleted before deleting the customer account.

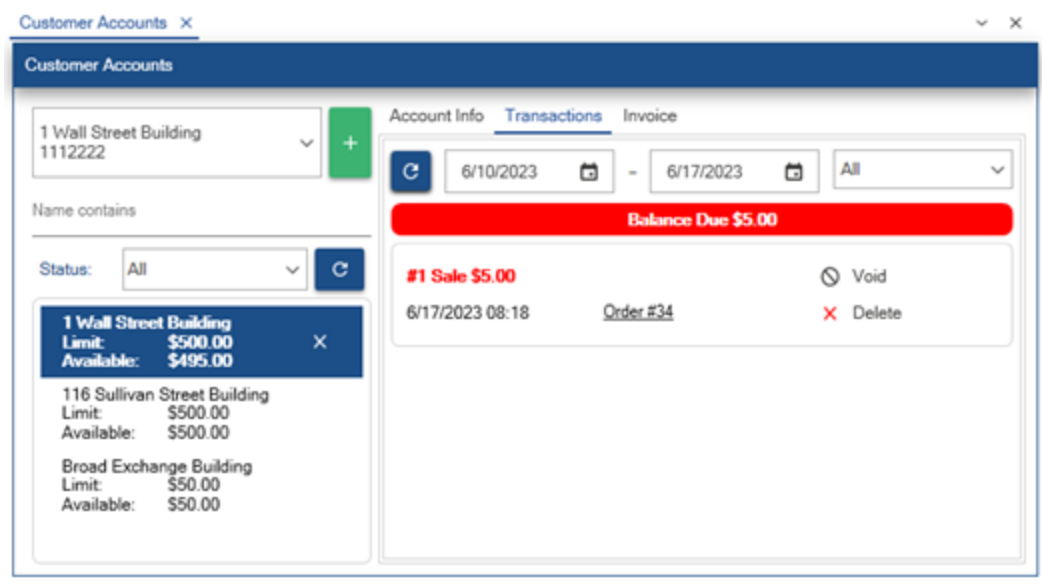
A new customer account can be added by selecting a customer from the drop-down list and then clicking the green + button. If using swipe card or barcode, swipe or scan the card to automatically insert the card number; otherwise enter the card number manually or leave the field blank. Each customer can have multiple customer accounts.

The screenshot shows the 'Customer Accounts' window. On the left, there is a search bar with '1 Wall Street Building 1112222' and a green '+' button. Below it, a list of accounts is shown with columns for Name, Limit, and Available. The first account is highlighted. On the right, the 'Account Info' tab is active, showing details for the selected account.

Customer Accounts	
1 Wall Street Building	Limit: \$500.00
1112222	Available: \$495.00
116 Sullivan Street Building	Limit: \$500.00
	Available: \$500.00
Broad Exchange Building	Limit: \$50.00
	Available: \$50.00

Account Info	
Customer Name	1 Wall Street Building
Payment Status	\$5.00 Due
Date Created	1/5/2022
Created By	POS USER
Account Limit	500.00
Expires	1/6/2022
Deactivated	<input type="checkbox"/>

A list of customer account transactions grouped by customer is available by clicking the Transactions tab. A transaction can be voided to remove the transaction from the customer account's liabilities but still retain the transaction info. A transaction can be permanently deleted if the transaction info is no longer required. The summary for any customer account can be printed by highlighting any of the customer account transactions and then selecting **Print Selected Customer Account Summary** from the drop-down list. The summary is formatted for thermal receipt printers.



9.2 New Customer Account

To start a new customer account or accept payment on an existing customer 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](#) ^[670] 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 customer accounts list will automatically display the New Customer Account screen.

Swiping a card with a card number that is already associated with a customer account will display the Customer Account Payment Screen.

The screenshot displays the 'CUSTOMER INFORMATION' screen. It includes a title bar with 'Demo Diner' and system icons. The main area is divided into three sections: 'ENTER THE PHONE NUMBER' with a yellow input field, a left arrow button, a numeric keypad, a green right arrow button, and a red vertical bar with a left arrow; 'CUSTOMER LOOKUP' with a 'NAME OR ADDRESS' input field; and 'RECENT CALLS'. A full QWERTY keyboard is visible at the bottom.

If starting a new customer 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.

The screenshot shows the 'CUSTOMER INFORMATION' form in the AmigoPOS 9 application. The form is titled 'Demo Diner' and includes fields for 'PHONE' (444-5555), 'ALTERNATE PHONE', 'LAST NAME' (City Hall), and 'FIRST NAME'. Below these is an 'ADDRESS' field with 'Broadway' entered, and buttons for 'DELETE' and 'ADD NEW'. A 'DELIVERY CHARGE' section shows 'North End (\$2.20)' selected, with other options like 'Web Order (\$2.50)', 'Free Web Order (FREE)', 'Downtown (\$2.75)', 'West Side (\$1.00)', and 'No Charge'. A row of icons includes 'CANCEL', 'CHANGE', 'SUMMARY', 'ORDERS', 'LOYALTY', 'ACCOUNT' (highlighted in red), 'ROUTE', 'MAP', 'EMAIL', 'BLOCK', and 'FINISHED'. At the bottom, a section titled 'SELECT THE ACCOUNT LIMIT TO START A NEW ACCOUNT' features four buttons: '\$20.00', '\$50.00', '\$100.00', and '\$500.00', along with a large green play button.

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.

Demo Diner

CUSTOMER INFORMATION

PHONE: **444-5555** ALTERNATE PHONE:

LAST NAME: **City Hall** FIRST NAME:

ADDRESS: **Broadway** DELETE ADD NEW

DELIVERY CHARGE: **North End (\$2.20)** Web Order (\$2.50) Free Web Order (FREE) Downtown (\$2.75) West Side (\$1.00) No Charge

← CANCEL
CHANGE
SUMMARY
ORDERS
LOYALTY
ACCOUNT
ROUTE
MAP
EMAIL
BLOCK
→ FINISHED

CUSTOMER ACCOUNT SUMMARY

ACCOUNT STATUS		TRANSACTION HISTORY	
ACCOUNT ID	4	NO RECORDS	
STARTED	6/17/2023		
EXPIRES	6/18/2023		
LAST USED	NEVER		
LIMIT	\$500.00		
AVAILABLE	\$500.00		
BALANCE DUE	\$0.00		

BARCODE
PRINT STATUS
PAYMENT

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](#)¹⁷⁴ can be edited in back office, as shown in the following topic.

Demo Diner

CUSTOMER INFORMATION

PHONE: **111-2222** ALTERNATE PHONE:

LAST NAME: **1 Wall Street Building** FIRST NAME:

ADDRESS: **Wall Street** DELETE ADD NEW

DELIVERY CHARGE: **West Side (\$1.00)** North End (\$2.20) Web Order (\$2.50) Free Web Order (FREE) Downtown (\$2.75) No Charge

← CANCEL
CHANGE
SUMMARY
ORDERS
LOYALTY
ACCOUNT
ROUTE
MAP
EMAIL
BLOCK
→ FINISHED

CUSTOMER ACCOUNT SUMMARY

ACCOUNT STATUS		TRANSACTION HISTORY	
ACCOUNT ID	2		
STARTED	1/3/2022	<div>\$50.00 Payment 6/17/2023 09:08 Order #35</div> <div>\$5.00 Sale 6/17/2023 08:18 Order #34</div>	
EXPIRES	1/6/2022		
LAST USED	6/17/2023 9:08 AM		
LIMIT	\$500.00		
AVAILABLE	\$545.00		
BALANCE DUE	-\$45.00		

BARCODE
PRINT STATUS
PAYMENT

9.3 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 customer account balance can be paid at a later date.



To settle a order with a customer account, open the order on the **SETTLE** screen and select the **CUSTOMER ACCOUNT** payment method.

The screenshot displays two panels. The left panel shows a receipt summary with a red 'BALANCE DUE \$5.00' banner. The right panel is titled 'SELECT THE CUSTOMER ACCOUNT' and shows a search bar with '1 Wall Street Building 111-2222' and '\$46.95 AVAILABLE'.

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

Buttons at the bottom: TRANSACTIO, RECALL, PRINT RECEIPT, CANCEL, FINISHED.

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.

The screenshot displays a 'Demo Diner' window with a 'CUSTOMER ACCOUNT TRANSACTION' section. A red arrow points to the 'PRINT SIGNATURE SLIP' button.

CUSTOMER ACCOUNT STATUS	
CUSTOMER	1 Wall Street Building [ID 2]
ACCOUNT ID	2
LIMIT	\$500.00
BALANCE DUE	\$5.00
AVAILABLE	\$495.00

Buttons: PRINT SUMMARY, CHANGE PAYMENT METHOD, PRINT SIGNATURE SLIP.

AMOUNT	50.00
GRATUITY	0.00
TOTAL	\$50.00

Buttons: 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, and a green play button.

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.

The screenshot shows the AmigoPOS 9 interface. The left panel has a green button at the top that says "NO BALANCE DUE". Below it is a section titled "CUSTOMER ACCOUNT STATUS" which is highlighted with a yellow border. This section contains the following information:

CUSTOMER	1 Wall Street Building 111-2222
ACCOUNT ID	1
LIMIT	\$50.00
BALANCE DUE	\$3.05
AVAILABLE	\$46.95

Below this table is a button labeled "PRINT SUMMARY". At the bottom of the left panel is a section titled "TRANSACTIONS" which contains a list of transaction details:

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

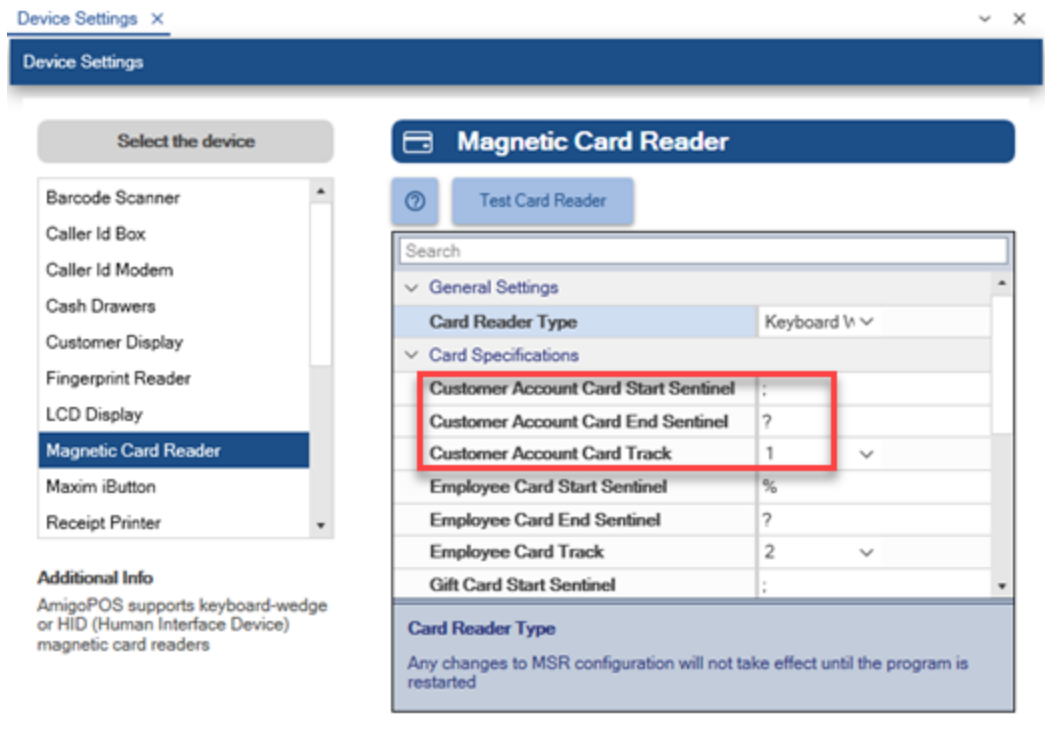
The right panel has a green button at the top that says "TRANSACTION COMPLETE". Below it is a section titled "AMOUNT TENDERED \$5.00" which is highlighted with a white border. Below this section is a large white button that says "NO CHANGE DUE". At the bottom of the right panel are four buttons: "ADDITIONAL PAYMENT" (with a dollar bill icon), "PRINT RECEIPT" (with a printer icon), "FINISHED" (with a back arrow icon), and "LOGOUT" (with a red lock icon).

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](#)¹⁷².

9.4 Card Swipe/Barcode

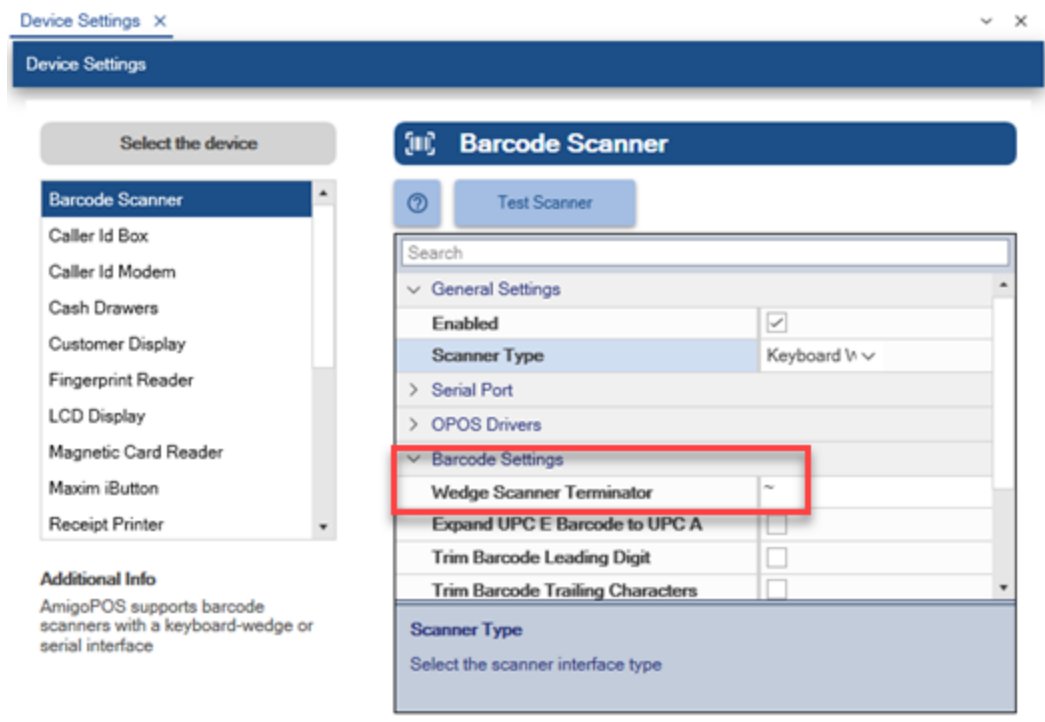
Magnetic Swipe Card

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](#)⁴⁷² topic for additional information.



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](#)^[304] for additional information.



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.

9.5 Signature Slip

Signature lines can be inserted at the bottom of the customer receipt by adding additional tags to the customer receipt template. Note that the signature lines print only when the customer receipt is printed from the customer account transaction number pad on the settle screen.

Open the customer receipt template editor, copy/paste the following text and tokens at the bottom and click Save. Note that the customer receipt preview does not display the changes since the receipt must be printed from the settle screen to display the signature lines.

```

46 <Validate=Void /><TextAlign=Center /><TextSize=22 /><TextSemiBold />Void
47
48
49 <Validate=SignatureSlip /><TextAlign=Center />CUSTOMER ACCOUNT TRANSACTION
50 <Validate=SignatureSlip /><TextAlign=Center /><CustomerAccountName />
51 <Validate=SignatureSlip />
52 <Validate=SignatureSlip /><TextSize=12 />AMOUNT<Column /><TotalAmount />
53 <Validate=SignatureSlip />
54 <Validate=SignatureSlip /><TextSize=12 />GRATUITY<Column />_____
55 <Validate=SignatureSlip />
56 <Validate=SignatureSlip /><TextSize=12 />TOTAL<Column />_____
57 <Validate=SignatureSlip />
58 <Validate=SignatureSlip /><TextSize=12 />SIGNATURE<Column />_____
59 <Validate=SignatureSlip />
60 <Validate=SignatureSlip /><TextAlign=Center /><TextSize=10 />I AGREE TO CHARGE THE TOTAL
61 <Validate=SignatureSlip /><TextAlign=Center /><TextSize=10 />TO MY HOUSE ACCOUNT
62 <Validate=SignatureSlip />

```

<Validate=SignatureSlip /><TextAlign=Center />CUSTOMER ACCOUNT TRANSACTION

<Validate=SignatureSlip /><TextAlign=Center /><CustomerAccountName />

<Validate=SignatureSlip />

<Validate=SignatureSlip /><TextSize=12 />AMOUNT<Column /><TotalAmount />

<Validate=SignatureSlip />

<Validate=SignatureSlip /><TextSize=12 />GRATUITY<Column />_____

<Validate=SignatureSlip />

<Validate=SignatureSlip /><TextSize=12 />TOTAL<Column />_____

<Validate=SignatureSlip />

<Validate=SignatureSlip /><TextSize=12 />SIGNATURE<Column />_____

<Validate=SignatureSlip />

<Validate=SignatureSlip /><TextAlign=Center /><TextSize=10 />I AGREE TO CHARGE THE TOTAL

<Validate=SignatureSlip /><TextAlign=Center /><TextSize=10 />TO MY HOUSE ACCOUNT

Recall the order on the settle screen and select the CUSTOMER ACCOUNT payment method. Click PRINT SIGNATURE SLIP to print a customer receipt with the signature lines.

TH **BALANCE DUE \$50.00**
\$48.75 CASH (2.5% DISCOUNT = \$1.25)

CUSTOMER ACCOUNT STATUS

CUSTOMER	1 Wall Street Building [ID 2]
ACCOUNT ID	2
LIMIT	\$500.00
BALANCE DUE	\$5.00
AVAILABLE	\$495.00

PRINT SUMMARY

ORDER NUMBER 35
TYPE DINE-IN
SERVER POS USER
STARTED 6/17/2023 9:08 AM
SUBTOTAL \$50.00
GRATUITY \$0.00
DISCOUNTS \$0.00
SURCHARGE \$0.00
DELIVERY \$0.00
TAX \$0.00
TOTAL \$50.00
RECEIVED \$0.00

TRANSACTIONS **RECALL** **PRINT RECEIPT** **CANCEL**

CUSTOMER ACCOUNT TRANSACTION

AMOUNT 50.00
GRATUITY 0.00
TOTAL \$50.00

CHANGE PAYMENT METHOD **PRINT SIGNATURE SLIP**

1 2 3
4 5 6
7 8 9
0 [PLAY]

Verify that the receipt is printed correctly with the correct signature lines and proper alignment, as shown in the following image.

CUSTOMER ACCOUNT TRANSACTION
1 Wall Str

AMOUNT \$6.05

GRATUITY

TOTAL

SIGNATURE

I AGREE TO CHARGE THE TOTAL
TO MY HOUSE ACCOUNT

Customer Receipt

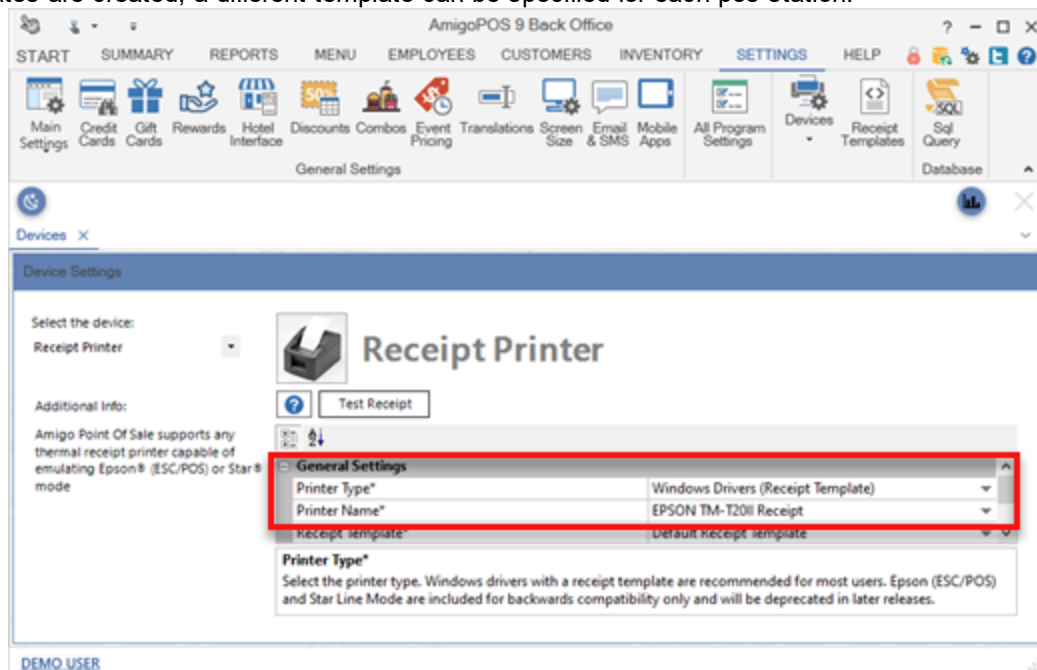
10 Customer Receipt

10.1 Overview

Customer receipt templates are used to completely customize the appearance of the customer receipt by using text and tokens to specify the values that are printed. Multiple languages and text alignments can be used on the same line of text in order to meet regional mandates multilingual receipts. Printing speed and quality is equal to or better than the printer's native command set (ESC/POS or Star Line Mode). In addition, templates are printed using Windows drivers so that virtually any thermal printer can be used to print customer receipts.

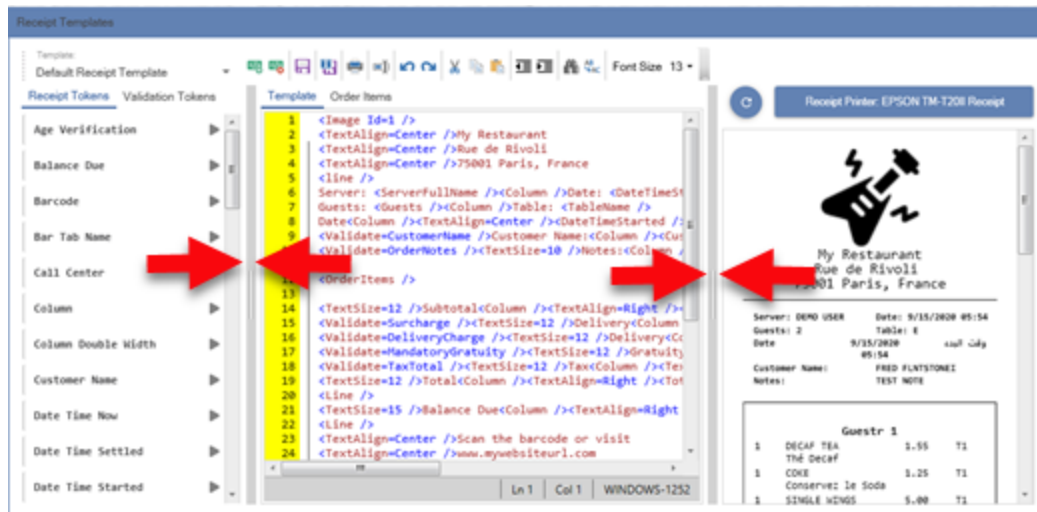
Receipt Printer

Install the receipt printer using the manufacturer's drivers, print a test page to verify that the installation is successful and select the printer in back office | settings | devices | receipt printer. Set the printer type to Windows Drivers (Receipt Template). The default receipt template is automatically selected. If multiple templates are created, a different template can be specified for each pos station.



Receipt Template Editor

Open the template editor in back office | settings | receipt templates. The editor is divided into 3 variable width sections. Drag either vertical handle with the mouse to resize. The receipt preview width is determined by the receipt printer's default paper size.



10.2 Receipt Template Tokens

The receipt templates uses XML tokens to determine the text and calculated order variables that should be printed on the customer receipt. The following tokens are currently in use. Please contact support if your business requires additional tokens that are not listed.

- **Age Verification:** Age verification method, description and birth date.
- **Balance Due:** The balance due after payments are subtracted from the order total.
- **Barcode:** Order number encoded in Code39 barcode.
- **Bar Tab Name:** Bar tab name entered when the bar tab is started. Use with bar tab validation tag to suppress when the name has not been entered.
- **Bottle Deposit:** The sum of the bottle deposits collected for all order items.
- **Call Center:** Call center order number from call center cloud service. Use with call center validation tag to suppress value when zero.
- **Column:** Separate 2 blocks of text in equal width columns. Multiple columns can be used on the same line.
- **Column Double Width:** Create 2 columns with the first column twice as wide. Useful for tip suggestions and foreign currency. One single double width column can be used on one line.
- **Customer First Name*:** The first name entered on the customer information screen.
- **Customer Last Name*:** The last name entered on the customer information screen.
- **Customer Full Name*:** The first and last name entered on the customer information screen.
- **Customer Street Number*:** The street number entered on the customer information screen.
- **Customer Address*:** The address entered on the customer information screen. The alternate address will print if the "Use Alternate Address" box is checked.

- Customer Address2*: The address line 2 entered on the customer information screen. The alternate address line 2 will print if the "Use Alternate Address" box is checked.
- Customer City*: The city entered on the customer information screen. The alternate city will print if the "Use Alternate Address" box is checked.
- Customer City Region Postal Code*: The city, region and postal code entered on the customer information screen. The alternate city, region and postal code will print if the "Use Alternate Address" box is checked.
- Customer Email*: The email entered on the customer information screen when starting a delivery or pickup order.
- Customer Name Prompt*: Customer name entered at the prompt when the order is started. This is not the customer name entered on the customer information screen for delivery and pickup orders.
- Customer Region*: The region entered on the customer information screen. The alternate region will print if the "Use Alternate Address" box is checked.
- Customer Postal Code*: The postal code entered on the customer information screen. The alternate postal code will print if the "Use Alternate Address" box is checked.
- Customer Phone Number*: The phone number entered on the customer information screen.
- Customer Phone Alternate*: The alternate phone number entered on the customer information screen.
- Customer Notes*: The additional notes entered on the customer information screen.
- Customer User Field 1*: The customer field 1 entered on the customer information screen.
- Customer User Field 2*: The customer field 2 entered on the customer information screen.
- Customer User Field 3*: The customer field 3 entered on the customer information screen.
- Date Time Now: Current date and time formatted according to the Windows Control Panel region settings.
- Date Time Settled: Date and time when order was settled formatted according to the Windows Control Panel region settings.
- Date Time Started: Date and time when order was started formatted according to the Windows Control Panel region settings.
- Delivery Charge: The delivery charge applied to the order. Use with the delivery charge validation tag to suppress value when zero.
- Discount Details: Itemized order discounts (not including line item discounts).
- Discounts: Sum of all order discounts. Use with the discount validation tag to suppress value when zero.

- **Gratuity:** Gratuity applied on the order entry screen. This value is different from the mandatory gratuity. Use with the gratuity validation tag to suppress value when zero.
- **Guests:** Number of guests. Use with the guests validation tag to suppress value when zero.
- **Image:** Select a high resolution png image. Recommended size 64x64. The Scale value is used to increase reduce the size of the image to accomodate different paper widths.
- **Line:** Print a horizontal line with 10 pixel margin.
- **Mandatory Gratuity:** Mandatory gratuity value. Use with the mandatory gratuity validation tag to suppress value when zero.
- **Order Items:** Order items as defined by order items template.
- **Order Events:** Order events such as notes received from the call center and web orders.
- **Order Notes:** Notes entered on the order entry screen.
- **Order Number:** The order number.
- **Order Type:** The order type as displayed in back office | settings | order types.
- **Payments:** List of payments. Use with the Payments validation token to suppress when the order has no payments.
- **PercentSubtotal:** Whole number percentage. Useful for mandatory gratuities and foreign currency. The value is calculated before the mandatory gratuities, tax, surcharge, delivery charge, discount is added to the total.
- **Percent Total Before Discount:** Whole number percentage. Useful for mandatory gratuities and foreign currency. The value is calculated before the discount is deducted from the total.
- **Percent Total:** Whole number percentage. Useful for mandatory gratuities and foreign currency. The value is calculated after the discount is deducted from the total.
- **QR Code:** 3D barcode with an encoded url.
- **Server First Name:** The server's first name.
- **Server First Last Init:** The server's first name and last initial.
- **Server Full Name:** The server's full name.
- **Split Even Amount:** Print the order total divided by the number of times the order is split.
- **Split Even Count:** Print the divisor for orders that are split evenly.
- **Subtotal:** Order subtotal before tax and discounts.
- **Surcharge:** Order surcharge. Use with Surcharge validation tag to suppress value when zero.
- **Table Name:** Table name. Use with Table Id validation tag to suppress value for orders with no table selected.
- **Tax 1:** Tax part 1. Useful when displaying itemized tax.

- Tax 2: Tax part 2.
- Tax 3: Tax part 3.
- Tax Total: Total order tax.
- Text Align: Specify left, center or right alignment. Default alignment is left.
- Text Bold: Print in bold text.
- Text Semi Bold: Print in semi bold text.
- Text Size: Set the text size. Typical values are 10 to 25.
- Total Amount: The order total with currency symbol.
- Web Order Number: Web order number from online ordering service. Use with Web Order validation tag to suppress value when zero.
- Web Order Payment: Web order payment method from online ordering service. Use with Web Order validation tag to suppress value when web order id is zero.

*Additional validation is not required. The line is printed only if the field contains text.

10.3 Receipt Template Validation

Validation tokens are used to conditionally print or suppress lines. The line is printed only when the condition is true. The following validation tokens are currently in use. Please contact support if your business requires additional tokens that are not listed.

- Bar Tab Name: Print line if the customer name is entered when starting the bar tab.
- Bottle Deposit: Print line if the sum of the bottle deposits is greater than zero.
- Call Center: Print line only for call center orders.
- Customer Name: Print line only if the customer name is entered.
- Customer Exists: Print line only when the customer id is greater than zero. Useful for delivery and pick-up orders when the customer information is saved in the database.
- Delay Order: Print line only for scheduled orders.
- Delivery Charge: Print line only when the delivery charge is greater than zero.
- Discount: Print line only when the discount is greater than zero.
- Drawer Reset: Print line only when the drawer reset id is greater than zero.
- Guests: Print line only when the guest count is greater than zero.
- Customer Account: Print line only if customer account transaction exist.
- Loyalty Card: Print line only if a loyalty card is assigned to the order.
- Mandatory Gratuity: Print line only when the mandatory gratuity is greater than zero.
- Minimum Age: Print only if an age verification method has been selected on the order entry screen.
- Order Events: Print line only if order events exist.
- Order Notes: Print line only if order notes exist.
- Refund: Print line only for refunds.
- Seating Chart: Print line only if a table is assigned to the order.
- Split By Guest: Print line only if the order is split by guest.

- Split Even: Print line only if the order is split even.
- Split Even Hide: Print line only if the order is not split even.
- Subtotal: Print line only when the subtotal is greater than zero.
- Surcharge: Print line only when the surcharge is greater than zero.
- Table: Print line only when table is selected on seating chart.
- Tax Total: Print line only when the total tax is greater than zero.
- Transactions: Print line only if transactions exist.
- Vat Subtotal: Print line only if the Vat tax is greater than zero.
- Void: Print line only for voids.
- Web Order: Print line only for web orders.

10.4 Receipt Template Usage

Each line in the receipt template consists of a series of text and/or tokens that are analyzed before the line is printed. The following components

- Static Text: Always printed on the customer receipt; typically the business name, address, phone and url.
- Conditional Text: Printed only when the [validation token](#)¹⁹⁰ condition is met.
- Image: A bitmap image that is always printed on the customer receipt; typically the business logo at the top
- Tokens: Calculated variables or [tokens](#)¹⁸⁷ that are replaced by text when the receipt is printed.
- Barcode: Code 39 barcode created using the order number
- QR Code: 3D barcode that can be scanned to open a url
- Order Items: A formatted list of order items printed in uniform columns. The header can be customized to include the item, quantity, item name, price each, price total and the tax abbreviation. Text size and weight can be adjusted depending on the number of columns and page width.

Begin with the default receipt template and modify the template according to the specific requirements. Adhere to the following guidelines when editing the receipt template:

- Ensure that the receipt printer is selected before designing the receipt template so that the correct printable paper area can be calculated.
- Do not insert a space between the token name and equals sign or the equals sign and value. For example, the line's text size should be defined as `<TextSize=15 />` and not `<TextSize = 15 />`
- Insert a carriage return when extra space is required between lines.

The toolbar is used to execute common editing commands.



The commands listed in order from the left are as follows:

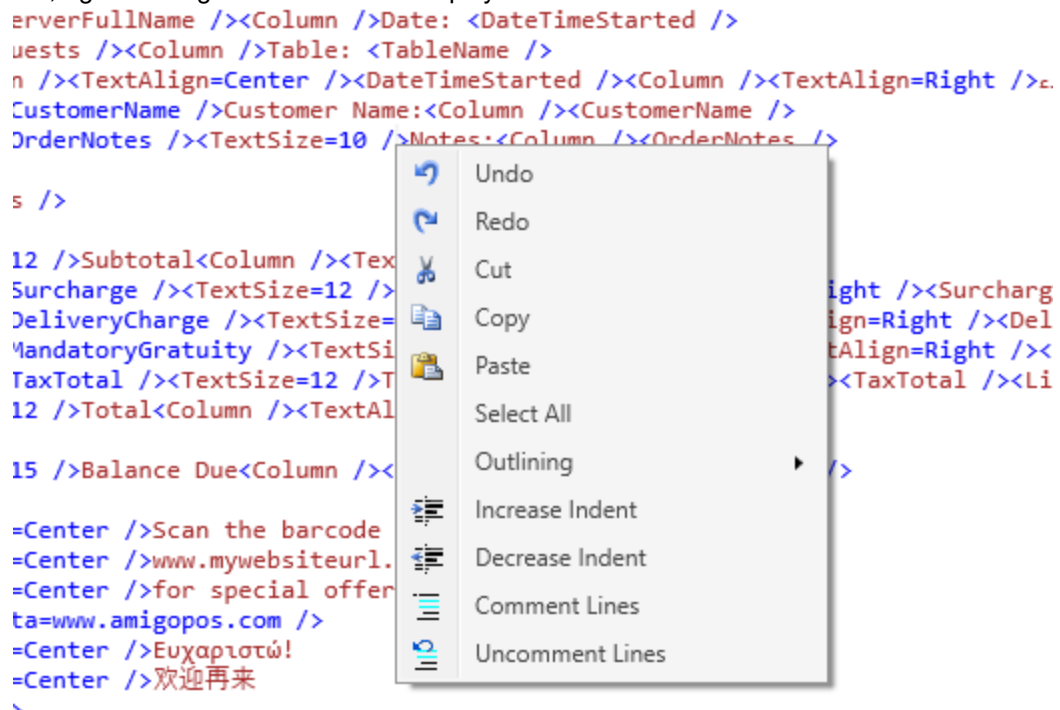
- Add new template
- Delete selected template
- Save changes to selected template

- Save selected template as new template
- Print receipt
- Rename selected template
- Undo last edit
- Redo
- Cut selection
- Copy selection
- Paste copied text
- Find
- Replace
- Set editor font size

Note that the editor also supports keyboard shortcuts including:

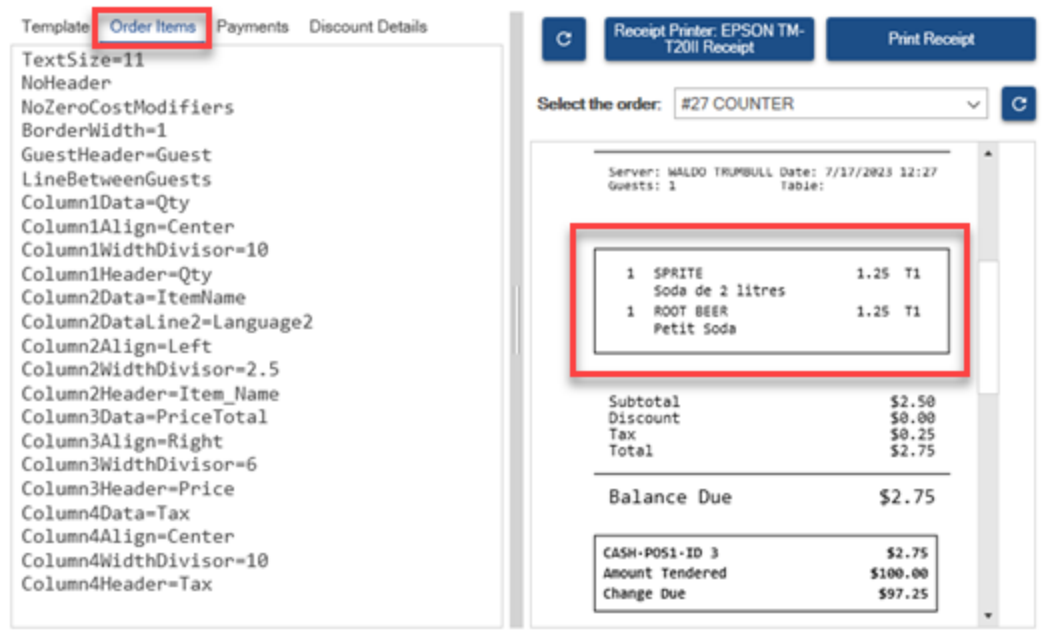
- CTL+A: Select all
- CTL+C: Copy selection
- CTL+V: Paste copied text
- CTL+Z: Undo last edit
- CTL+X: Cut selection
- CTL+F: Find
- CTL+H: Replace

In addition, right-clicking on the editor will display a context menu that includes the edit commands:



10.5 Receipt Template Order Items

The order items template is an additional template that defines the columns printed when order items are itemized on the customer receipt. The order items are printed at the position where the [order items token](#) is inserted into the receipt template.



The following tokens are used to define the order items template. Note that the tokens do not use XML notation and only one token per line can be used. The text with a yellow background is user defined.

- **TextSize=11**: The text size to use when printing the order item details. The text size can be increased when using fewer columns or reduced when using more columns.
- **NoHeader**: The text at the top of each column is omitted when this token is included.
- **NoZeroCostModifiers**: Print only order item modifiers with a price greater than zero.
- **GuestHeader=Guest**: This value determines the text that precedes the guest number when the order items are grouped by guest and the guest count is 2 or more.
- **LineBetweenGuests**: When this token is included, a line is inserted between each guest's order items.
- **BorderWidth=1**: Determines the line thickness of the border that is printed around the order items. When a border is not required, set to zero or omit the tag.

The [x] should be replaced by the column number in the following tokens:

- **Column[x]Data=ItemName**: The data printed in the first column. Choose from *Qty*, *ItemName*, *PriceEach*, *PriceTotal*, or *Tax*
- **Column[x]DataLine2=Language2**: When this token is included, the order item name's Language2 field will print immediately below the order item name. Note that the value will not print if the regular or bar menu item does not have a second language defined.

- Column[x]DataLine3=ItemNotes: When this token is included, the order item notes field will print immediately below the order item name. Note that the value will not print if the regular or bar menu item does not have item notes defined.
- Column[x]Align=Center: The text alignment of the header and text. Choose from Left, Right or Center. The default alignment is Left when this token is omitted.
- Column[x]WidthDivisor=10: The printable page width is divided by this value to determine the column width. Use trial and error to determine the proper column widths. Proper column widths are dependent on the number of digits in the price, the length of the menu item name and the typical quantity per item.
- Column[x]Header=Item_Name: The text that should appear at the top of the column. This token is not used if the NoHeader tag is included.

The following is a typical order items template with 4 columns, where the order item name is printed in 2 languages. When defining the order items template, verify that each token appears on a separate line and that there are no empty lines between tokens.

```

TextSize=11
NoHeader
NoZeroCostModifiers
BorderWidth=1
GuestHeader=Guestr
LineBetweenGuests
Column1Data=Qty
Column1Align=Center
Column1WidthDivisor=10
Column1Header=Qty
Column2Data=ItemName
Column2DataLine2=Language2
Column2DataLine3=ItemNotes
Column2Align=Left
Column2WidthDivisor=2.5
Column2Header=Item_Name
Column3Data=PriceTotal
Column3Align=Right
Column3WidthDivisor=6
Column3Header=Price
Column4Data=Tax
Column4Align=Center
Column4WidthDivisor=10
Column1Header=Tax
Order items template viewed in the receipt template editor:

```


Template
Order Items

```

TextSize=11
NoHeader
BorderWidth=1
GuestHeader=Guest
LineBetweenGuests
Column1Data=Qty
Column1Align=Center
Column1WidthDivisor=10
Column1Header=Qty
Column2Data=ItemName
Column2DataLine2=Language2
Column2Align=Left
Column2WidthDivisor=2.5
Column2Header=Item_Name
Column3Data=PriceTotal
Column3Align=Right
Column3WidthDivisor=6
Column3Header=Price
Column4Data=Tax
Column4Align=Center
Column4WidthDivisor=10
Column1Header=Tax

```

Receipt Printer: EPSON TM-T20III Receipt

SERVER: DEMO USER
DATE: 9/16/2020 14:01

Guests: 2
Table: G

Date
9/16/2020
وقت البدء
14:01

Notes:
EXTRA NAPKINS

Guest 1

1
ITALIAN SAUSAGE SUB
5.50
T1

Sous de la Saucisse
Italien

1
AMER CHEESE
1.25
T1

COFFEE
Café

Guest 2

1
SINGLE WINGS
5.00
T1

Ailes seules

Discount
-0.50

PLAIN
EXTR CARROT

1
DIET COKE
1.25
T1

Soda de 1 litres

Subtotal
\$12.50

Gratuity
\$2.00

Tax
\$1.25

Total
\$15.75

Order as entered on the order entry screen:

NEW DINE-IN ORDER
SERVER DEMO U

GUEST 2 OF 2

GUEST 1

- 1 **ITALIAN SAUSAGE** \$5.50
- AMER CHEESE
- 1 **COFFEE** \$1.25

GUEST 2

- 1 **SINGLE WINGS** \$5.00
FIXED DISCOUNT -\$0.50
- PLAIN
- EXTR CARROT
- 1 **DIET COKE** \$1.25

\$15.75 GRATUITY \$2.00
TAX \$1.25

SUBMIT

NO RECEIPT **CASH** **CREDIT** **SETTLE**

INFO **MISC** **EXTRA...** **RETAIL** **GRATUITY** **LOYALTY** **DISCOUNT** **COMP** **HOLD ALL** **TIME** **REFUND** **RECALL** **LOGOUT** **CANCEL**

PIZZA **WINGS** **SUBS** **DRINKS** **DESSERT** **CLUBS** **SANDWICH** **BURGER**

Customer receipt printed using an Epson TM-T20II thermal receipt printer:



My Restaurant
Rue de Rivoli
75001 Paris, France

Server: DEMO USER Date: 9/16/2020 14:07
Guests: 2 Table: G
Date 9/16/2020 وقت البدء
14:07
Notes: EXTRA NAPKINS

Guest 1			
1	ITALIAN SAUSAGE SUB	5.50	T1
	Sous de la Saucisse		
	Italien		
	AMER CHEESE		
1	COFFEE	1.25	T1
	Café		

Guest 2			
1	SINGLE WINGS	5.00	T1
	Ailes seules		
	Discount	-0.50	
	PLAIN		
	EXTR CARROT		
1	DIET COKE	1.25	T1
	Soda de 1 litres		

Subtotal	\$12.50
Gratuity	\$2.00
Tax	\$1.25
Total	\$15.75

10.6 Receipt Template Payments

The payments template is an additional template that defines the columns printed when payments are itemized on the customer receipt. The payments are printed at the position where the [payments token](#) is inserted into the receipt template.



The following tokens are used to define the payments template. Note that the tokens do not use XML notation and only one token per line can be used. The text with a yellow background is user defined.

- TextSize=**11**: The text size to use when printing the payments.
- AmountTenderedText=**Amount_Tendered**: When the ShowChangeDue token is included, this text will print on the amount tendered line. The underscore is replaced by a space when printing.
- AmountAlign=**Right**: Sets the alignment for the transaction amount, amount tendered and change due.
- ChangeDueText=**Change_Due**: When the ShowChangeDue token is included, this text will print on the change due line. The underscore is replaced by a space when printing.
- PaymentDescriptionColumn=**1**: Set to 1 to print the text on the left and the amount on the right. Set to 2 to print the text on the right and the amount on the left.
- PaymentDescriptionAlign=**Left**: Sets the alignment for the payment description, amount tendered text and change due text.
- Margin=**0**: Sets the margin in pixels that is inserted around the payments.
- BorderWidth=**1**: The border that prints around the payments. Set to zero to hide the border.
- ShowChangeDue: Insert this tag to display the amount tendered and change due.
- ShowPosStation: Append the pos station id to the transaction description
- ShowTransactionId: Append the transaction id to the transaction description
- LineBetweenPayments: Print a line between each payment. Has no affect for a single payment.

10.7 Receipt Template Discounts

The itemized discounts template is an additional template that defines the columns printed when discounts are itemized on the customer receipt. The discounts are printed at the position where the [discounts token](#)¹⁸⁸ is inserted into the receipt template.

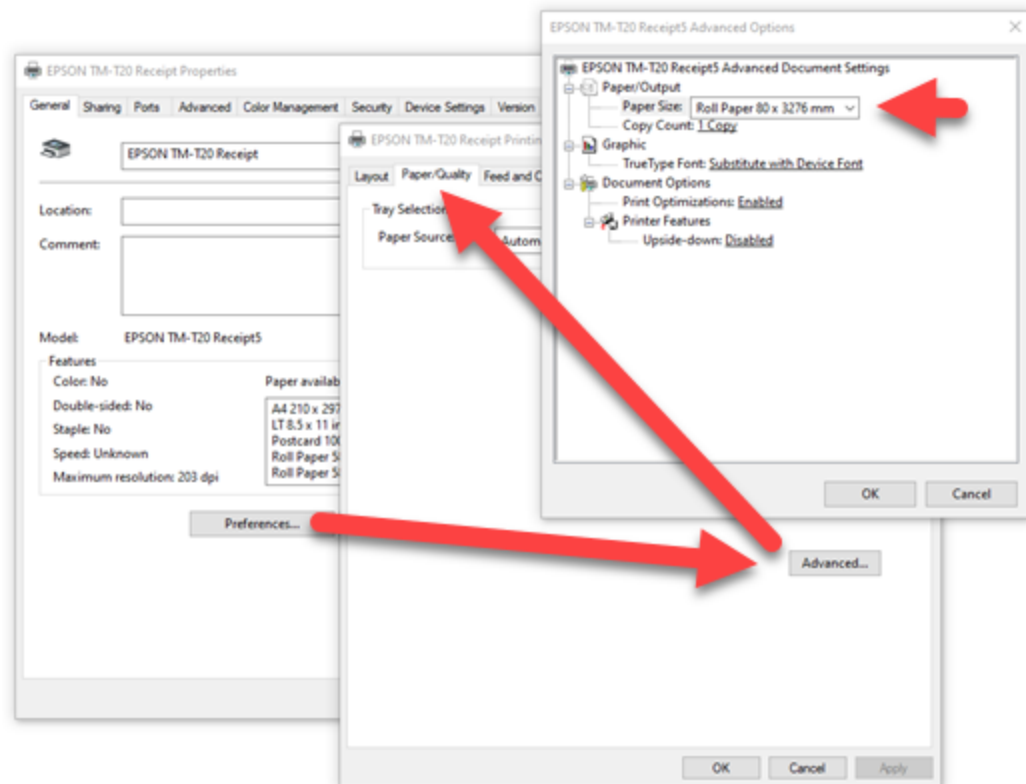
The following tokens are used to define the itemized discounts template. Note that the tokens do not use XML notation and only one token per line can be used. The text with a yellow background is user defined.

- TextSize=**11**: The text size to use when printing the discounts.
- AmountAlign=**Right**: Sets the alignment for the discount amount.
- DiscountDescriptionColumn=**1**: Set to 1 to print the text on the left and the amount on the right. Set to 2 to print the text on the right and the amount on the left.
- DiscountDescriptionAlign=**Left**: Sets the alignment for the discount description.
- Margin=**0**: Sets the margin in pixels that is inserted around the discounts.
- BorderWidth=**1**: The border that prints around the discounts. Set to zero to hide.
- LineBetweenDiscounts: Print a line between each discount. Has no affect for a single discount.

10.8 Paper Size

In some cases Windows will automatically cut the receipt before the entire print job has been rendered. Adjust the paper size to prevent this issue from occurring.

Open Windows Control Panel | Devices and Printers and right-click on the receipt printer. Select Printer Properties to display the printer driver dialog and click Preferences... Select the Paper/Quality tab and click Advanced... Set the Paper Size setting to 80 x 3276 mm.



Daily Usage

11 Daily Usage

11.1 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](#) 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

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

2/18/2021 5:39 PM

RESET CASH DRAWER

POS STATION 1 - DRAWER 1

START AMOUNT
\$11.11
PRESS TO CHANGE

CASH IN DRAWER \$14.07
LAST RESET NEVER

ALL STATIONS

OPEN ORDERS TOTAL \$7.92
SETTLED ORDERS TOTAL \$11.88

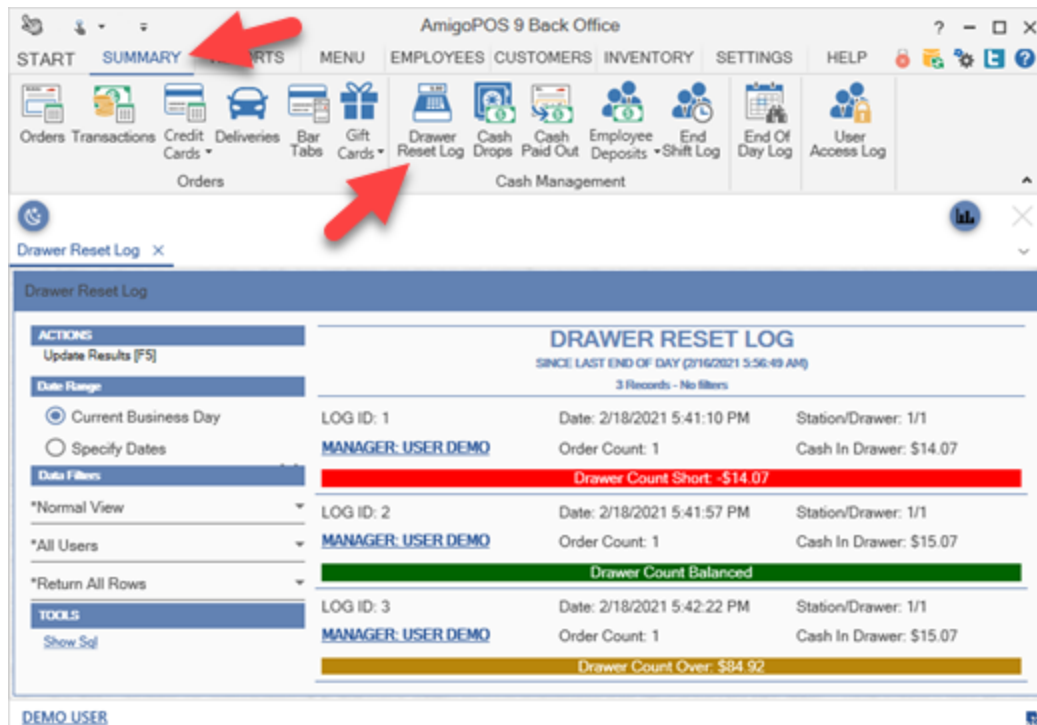
COUNT DRAWER

DRAWER REPORT
POS STATION 1 - DRAWER 1
2/18/2021 5:40:26 PM

DRAWER START	\$11.11
TRANSACTIONS (+)	
CASH(1)	\$3.96
CASH PAYOUTS (-)	
PRODUCT DELI(MISC)	\$1.00
CASH IN DRAWER	\$14.07

PRINT

Always reset all active cash drawers before performing the [End Of Day](#) 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.



Previous drawer reset reports are available in Back Office | Summary | Cash Drawer Reset Log. 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
- **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](#)^[205] procedure is completed.

The screenshot shows the 'Manager Screen Settings' window with the 'Drawer Reset' tab selected. The settings are organized into sections: 'Drawer Count', 'DrawerReport', and 'Drawer Reset'. Each section contains a list of settings with checkboxes.

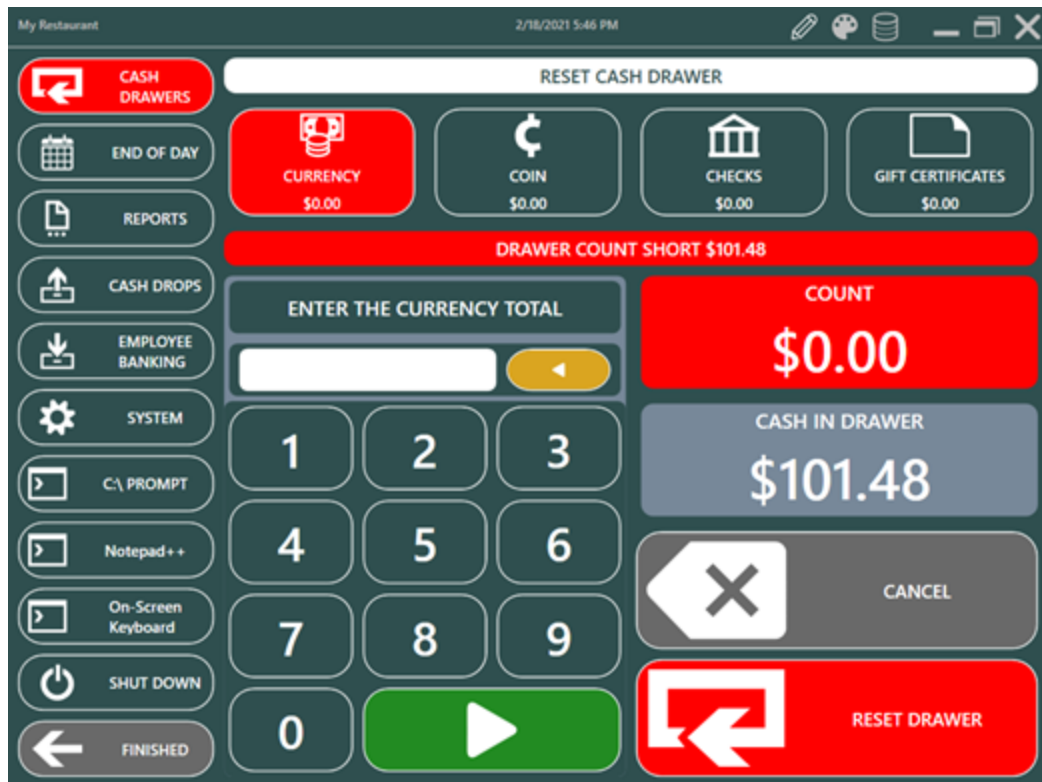
Section	Setting	Value
Drawer Count	Show Drawer Count	<input checked="" type="checkbox"/>
	Blind Drawer Count	<input type="checkbox"/>
DrawerReport	Non-Cash Transactions	<input checked="" type="checkbox"/>
	Transaction Details	<input type="checkbox"/>
Drawer Reset	Hide Totals	<input type="checkbox"/>
	Open Drawer After Reset	<input checked="" type="checkbox"/>
	Print Report After Reset	<input checked="" type="checkbox"/>

Below the settings table, there is a section titled 'Blind Drawer Count' with a description: 'Check the box to hide the expected cash in drawer amount when performing the cash drawer count'.

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.



11.2 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](#)^[202] 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 | Main Settings | Manager Screen | End Of Day.

Manager Screen Settings x

Drawer Reset **End Of Day** End of Day Reports Special Events Revenue Centers

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 Confirmation	Yes
End Of Day Discounts Summary	Yes
End Of Day Email Report	No
End Of Day Hide Totals	No
End Of Day Include Scheduled Orders	Yes
End Of Day List Scheduled Orders	Yes

Disable End Of Day Open Tickets
Set to Yes to disable the End-Of-Day button when open orders exist

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.

My Restaurant 2/18/2021 5:55 PM

END OF DAY

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

END OF DAY REPORT
2/18/2021 5:56:06 PM

TRANSACTIONS SUMMARY

CASH(4)	\$102.25
TAX	\$92.95
SUBTOTAL	\$92.95
TAX	\$9.30
TOTAL	\$102.25

SALES BY ORDER TYPE SUMMARY

COUNTER(1)	\$90.37
PICK-UP(3)	\$11.88
TOTAL	\$102.25

SUBTOTAL BY ITEM TYPE

Regular (3)	\$89.35
Regular Modifier (2)	\$12.90
TOTAL	\$102.25

PRINT

CURRENT DAY - ALL POS STATIONS

LAST END OF DAY	2/16/2021 5:56 AM
OPEN ORDERS COUNT	0
OPEN ORDERS TOTAL	\$0.00
OPEN PREAUTH COUNT	0
SETTLED ORDERS COUNT	4
TRANSACTIONS COUNT	4
VOIDS COUNT	0
VOIDS TOTAL	\$0.00
SUBTOTAL	\$92.95
TAX	\$9.30
FIXED DISCOUNTS	(-) \$0.00
CASH PAID OUT	(-) \$1.00
DELIVERY CHARGES	\$0.00
GRATUITIES	\$0.00
SURCHARGES	\$0.00
GRAND TOTAL	\$101.25

END OF DAY DISABLED
*RESET REQUIRED AT STAT 1 DOW 1

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.

My Restaurant 2/18/2021 5:56 PM

END OF DAY

CASH DRAWERS

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

C:\ PROMPT

Notepad ++

On-Screen Keyboard

SHUT DOWN

FINISHED

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

END OF DAY REPORT
2/18/2021 5:56:59 PM

TRANSACTIONS SUMMARY

CASH(4)	\$102.25
	\$102.25

TAX COLLECTED

SALES SUBTOTAL	\$92.95
TAX	\$9.30
	\$102.25

SALES BY ORDER TYPE SUMMARY

COUNTER(1)	\$90.37
PICK-UP(3)	\$11.88
	\$102.25

SUBTOTAL BY ITEM TYPE

Regular (3)	\$89.35
Regular Modifier (2)	\$0.00
	\$89.35

PRINT

CURRENT DAY - ALL POS STATIONS

LAST END OF DAY	2/16/2021 5:56 AM
OPEN ORDERS COUNT	0
OPEN ORDERS TOTAL	\$0.00
OPEN PREAUTH COUNT	0
SETTLED ORDERS COUNT	4
TRANSACTIONS COUNT	4
VOIDS COUNT	0
VOIDS TOTAL	\$0.00
SUBTOTAL	\$92.95
TAX	\$9.30
FIXED DISCOUNTS	(-) \$0.00
CASH PAID OUT	(-) \$1.00
DELIVERY CHARGES	\$0.00
GRATUITIES	\$0.00
SURCHARGES	\$0.00
GRAND TOTAL	\$101.25

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, as described [below](#). New users are encouraged to enable the confirmation screen, since the end of day procedure cannot be reversed.

My Restaurant 2/18/2021 5:58 PM

END OF DAY

END OF DAY CONFIRMATION

CASH DRAWERS

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

C:\ PROMPT

Notepad ++

On-Screen Keyboard

SHUT DOWN

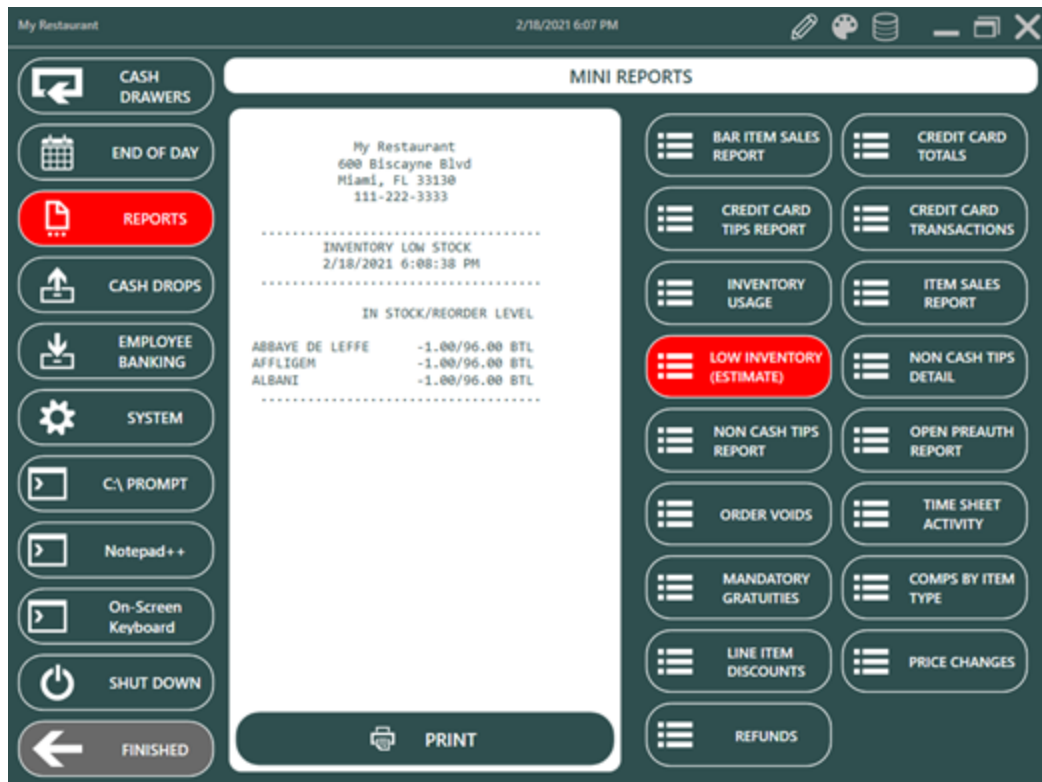
FINISHED

RUN END OF DAY

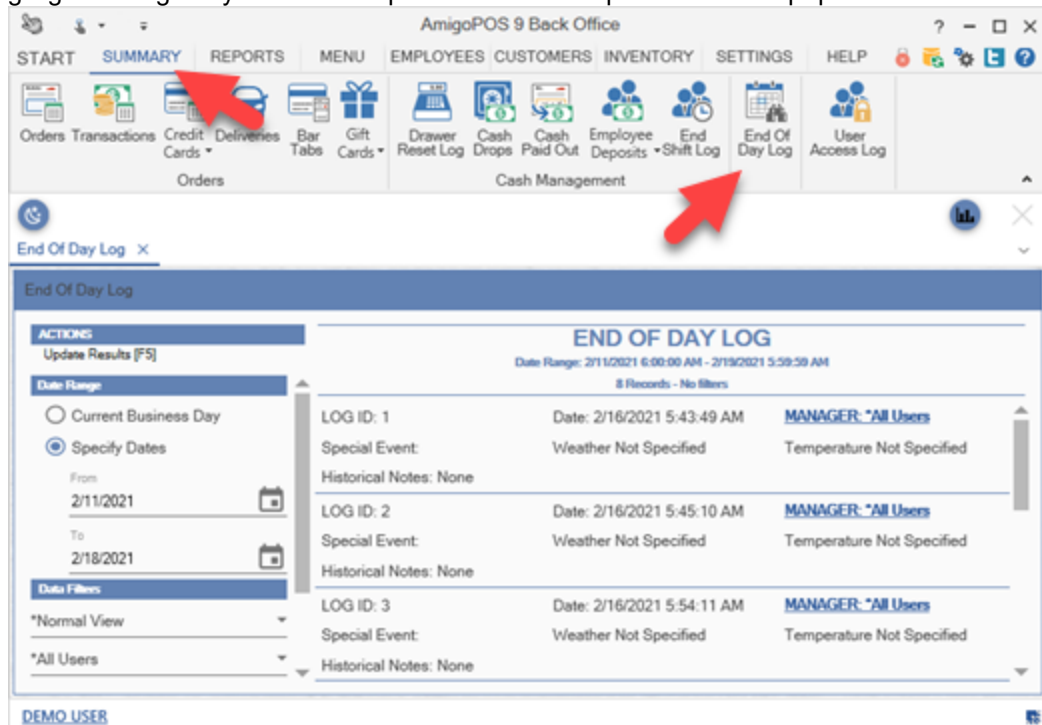
CANCEL

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 No in Back Office | Settings | Main Settings | Manager | End Of Day.

Many commonly used 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](#)²¹⁰ for details). The reports contain current sales data only (data from sales since the last End of Day was run).



Previous end of day reports are available in Back Office | Summary | Cash Management | End Of Day Log. Highlight the log entry and click Reprint to send the report to the receipt printer.



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:

Manager Screen Settings ×

Drawer Reset **End Of Day** End of Day Reports Special Events Revenue Centers ◀ ▶

End Of Day Include Scheduled Orders	Yes
End Of Day List Scheduled Orders	Yes
End Of Day Order Type Summary	Yes
End Of Day Removed Items Summary	Yes
End Of Day Report Email Recipients	XXXX
End Of Day Revenue Center Summary	Yes
End Of Day Server Sales Summary	Yes
End Of Day Subtotal By Item Type Summary	Yes
End Of Day Tax Collected	Yes
End Of Day Terminal Sales Summary	Yes
End Of Day Transactions 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.

- **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

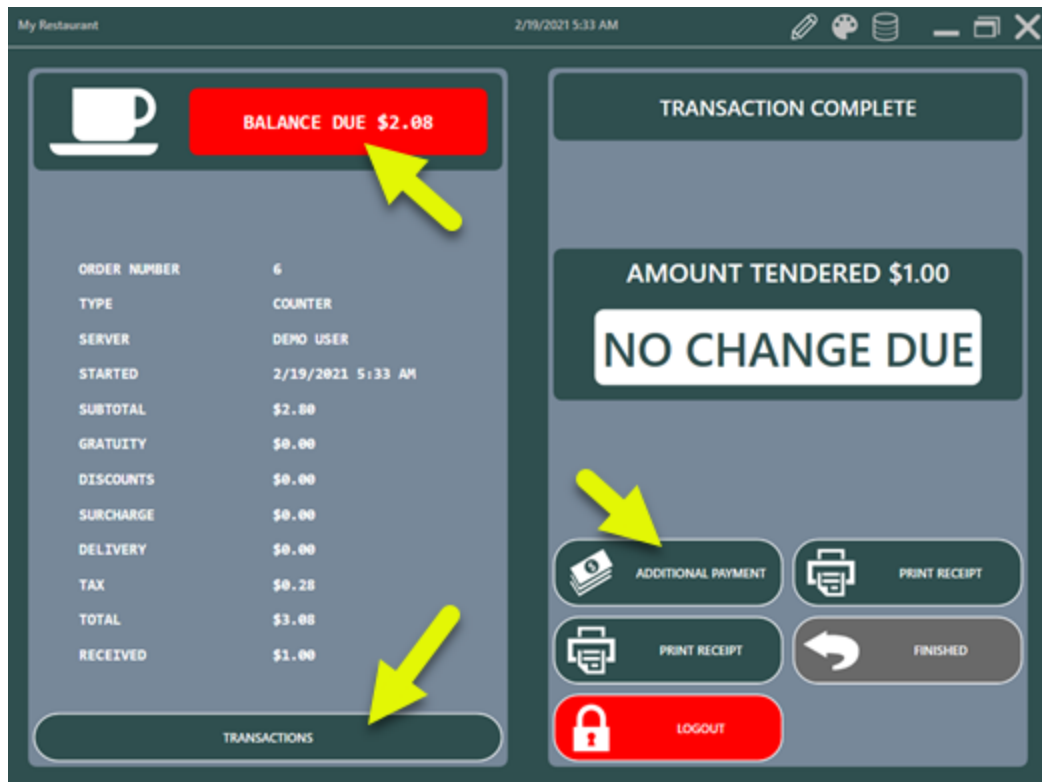
The End Of Day reports list can be customized in Back Office | Settings | Main Settings | Manager. The database must be synchronized to apply any changes. The following settings are available for each report:

Manager Screen Settings ×				
Drawer Reset End Of Day End of Day Reports Special Events Revenue Centers				
	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 (ACTUAL)	7	<input type="checkbox"/>	<input checked="" 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"/>

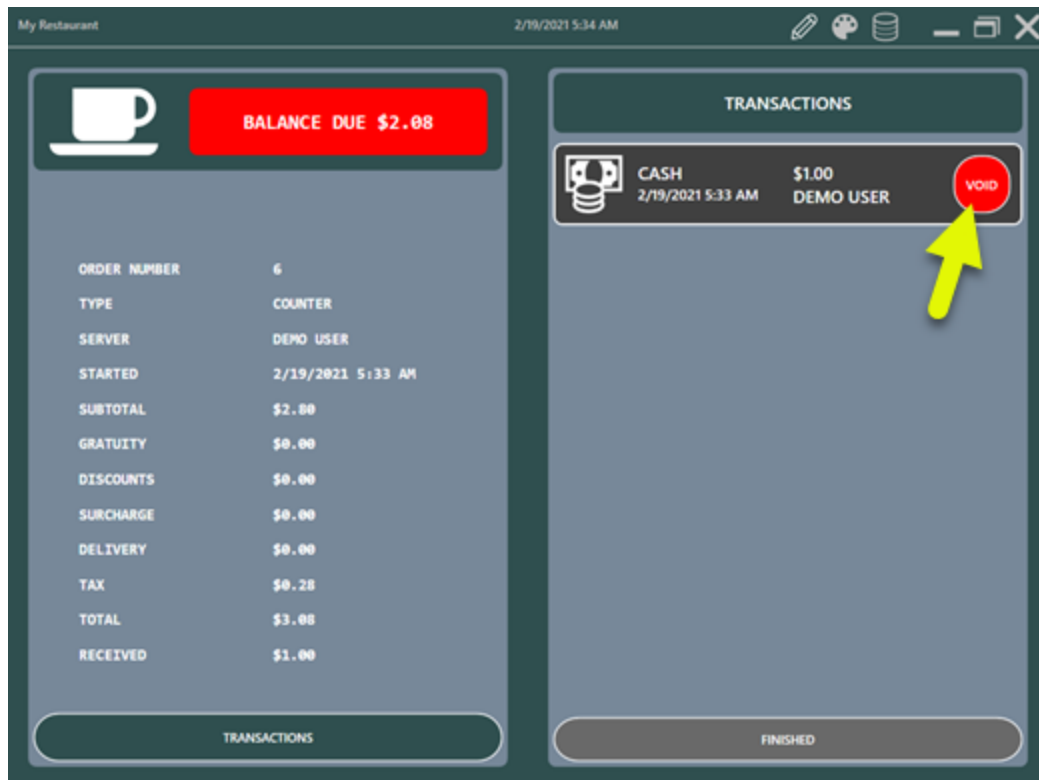
- **Report Name:** The text that appears on the report button
- **Button position:** The position of the report button relative to the button position of other report buttons
- **Auto-Print End Of Day:** Set to True to print this report automatically when the End Of Day procedure is performed
- **Disable:** Hide this report

11.3 Transactions Management

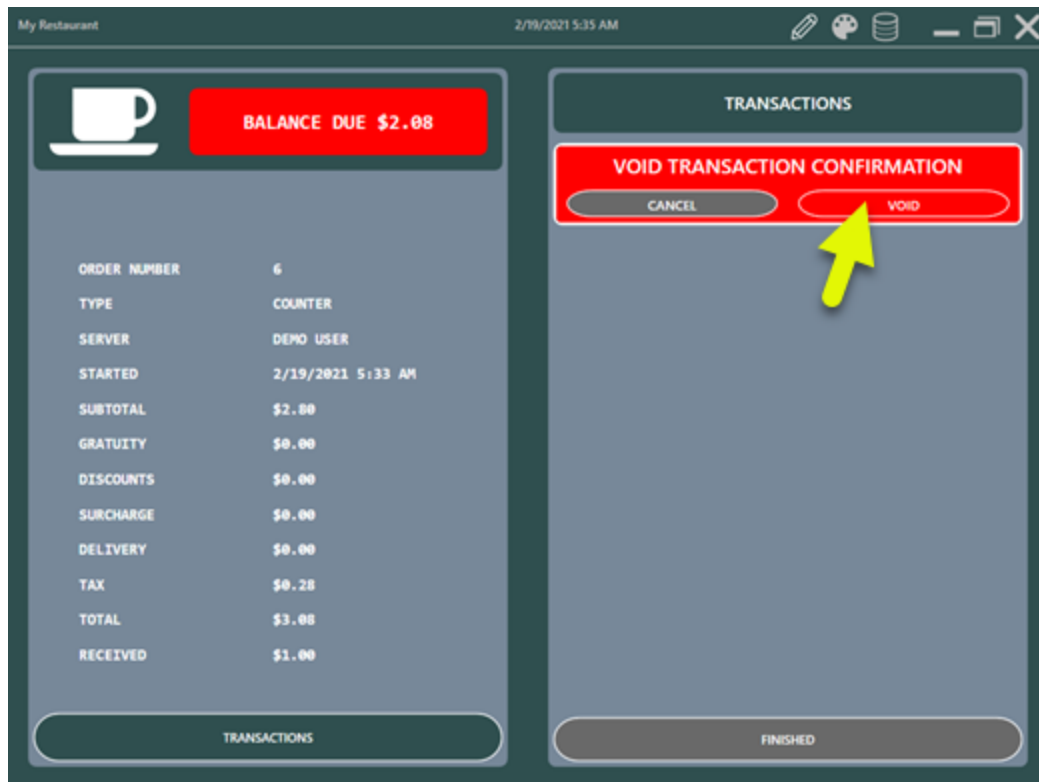
Each order will have one or more associated tender transactions. In some cases, a customer may wish to use multiple payment methods. The order will not be considered settled until the balance due is zero. The order will also continue to appear on the order selection screens until the balance due is zero. Review the [settle order](#)^[673] help topic for additional details



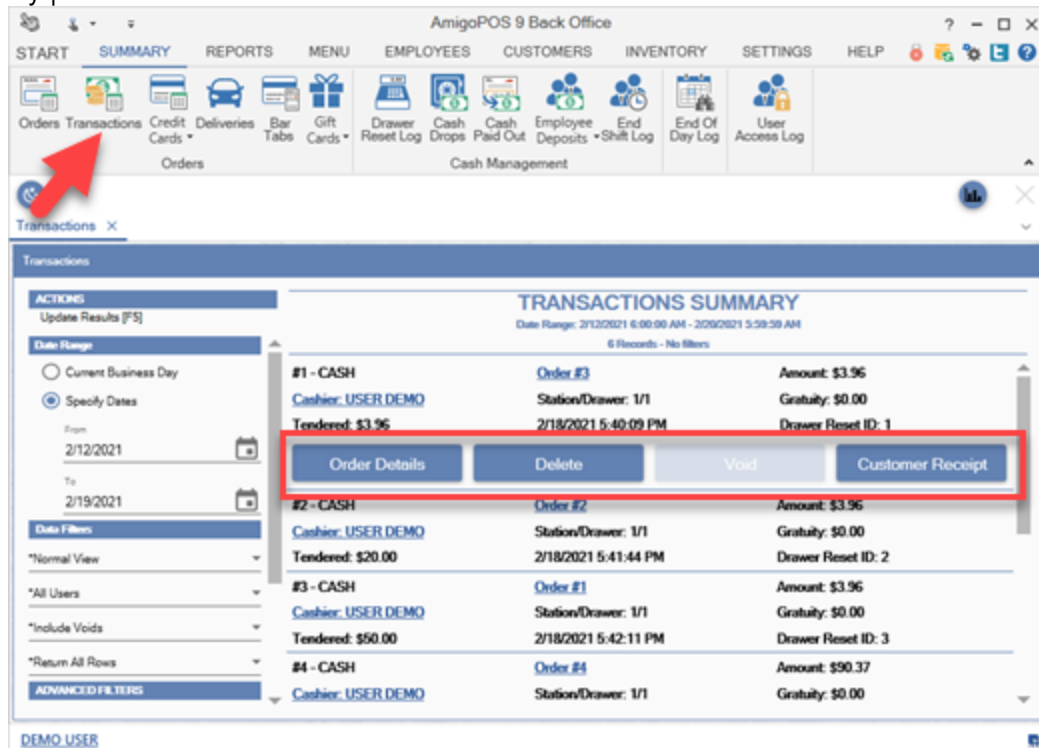
The cash drawer will open for some transaction types. Press the **ADDITIONAL PAYMENT** button to add another payment to the order. The **ADDITIONAL PAYMENT** will not appear if the order balance due is zero.



Review the information displayed on the void transaction confirmation prompt. If correct, press the **VOID** button.



If a mistake is made, the void transaction can be reversed by selecting the transaction in Back Office | Summary | Transactions.



11.4 Driver Banking

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](#) ^[210] 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 customer 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 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

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 | Employee Banking | Driver Banking** and adjust the settings that contain the **Driver Report** prefix, as shown below.

Employee Banking Settings

Server Banking **Driver Banking**

Search

General Settings

Enable Driver Banking	<input checked="" type="checkbox"/>
Driver Job Type	DRIVER

Delivery Charges

Deduct Delivery Charges	<input checked="" type="checkbox"/>
-------------------------	-------------------------------------

Gratuities

Deduct Delivery Charge Percentage	100.00
Deduct Non Cash Gratuities	<input checked="" type="checkbox"/>
Credit Card Tips Percentage	0.00

Cash Payout

Delivery Charge Payout Reason	DRIVER DELIVERY
Gratuity Payout Reason	DRIVER TIPS
Payout Vendor	EMPLOYEE

Report

Delivery Charges	<input checked="" type="checkbox"/>
Itemize Gratuities	<input checked="" type="checkbox"/>
Itemize Order Details	<input checked="" type="checkbox"/>
Itemize Transaction Details	<input checked="" type="checkbox"/>

Enable Driver Banking

Check the box to use driver banking

Driver Liability Calculation

The total liability for each driver is determined for a given business day, regardless of cash drawer 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

```

*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.

11.5 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.

The typical usage scenario for dine-in restaurants is:

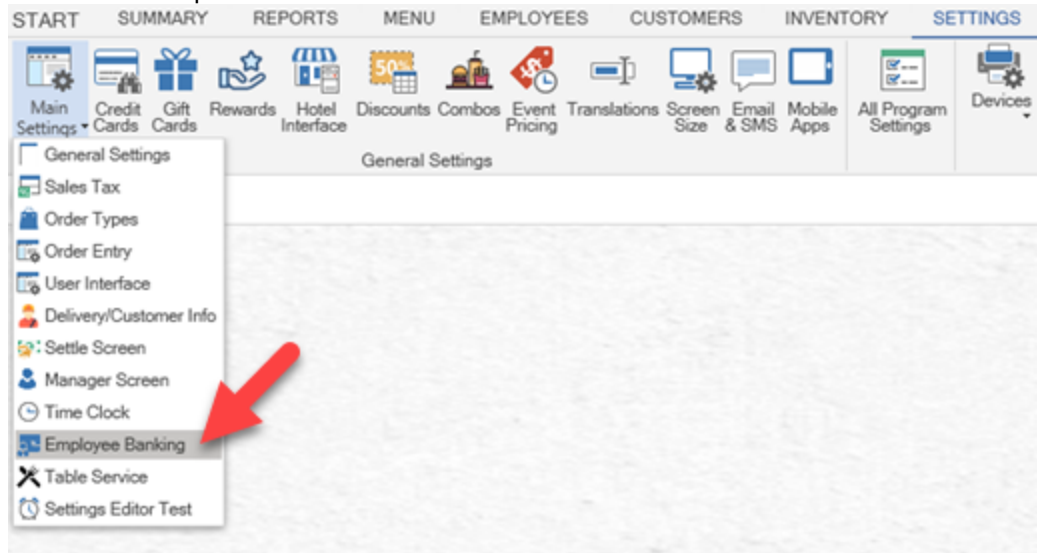
1. The server presents the guest check when the customer is ready to pay.
2. The customer pays with cash and optionally include a cash gratuity in the amount tendered.
3. The server selects the order on the recall list and presses the CHECK IN or BANK button to hide the order. Checked in orders can be recalled by toggling the OPEN/ALL filter at the top. Note that settling the order with the CASH BANK payment method can also be used to check in the order so that the order no longer appears on the recall list.
4. The server retains the funds for all checkin in orders until the end of the shift.
5. When the server's shift has ended, the manager opens the EMPLOYEE BANKING on the MANAGER screen selects the server and presses the end shift button.
6. The server's end shift report includes the total amount of all orders less any credit card gratuities. Note that credit card gratuities can be ignored as described below.
7. The server remits the amount owed in cash and the manager presses the END SHIFT button. A cash transaction is automatically submitted for each order and the orders are settled.

Server banking configuration and usage is described below:

- [Configuration](#) ^[218]
- [Order Check-In](#) ^[221]
- [Server Deposits](#) ^[221]
- [End Shift](#) ^[222]
- [Gratuity Payout](#) ^[224]
- [Server Bank Report](#)

Configuration

Server banking is configured in **Back Office | Settings | Main Settings | Employee Banking**. Settings are shared between all pos stations.



The settings 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** ^[220]: 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](#) ^[279] are enabled).
- **Server Gratuity Payout:** Select the cash paid out reason to use for server gratuity disbursements

Employee Banking Settings ×

Server Banking Driver Banking

End Shift Print Server Report	Yes
End Shift Server Auto Clock Out	Yes
Server Banking	No
Server Banking Credit Card Tips Deduct Fe	No
Server Banking Credit Card Tips Percentag	0
Server Banking Deduct Gratuities	Yes
Server Banking Deduct Mandatory Gratuiti	Yes

Server Banking
Use server banking

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](#) ^[433] must be set to Yes for the server job type (the Allow Cash permission can be set to No).

Settle Screen Settings					
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"/>	

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.

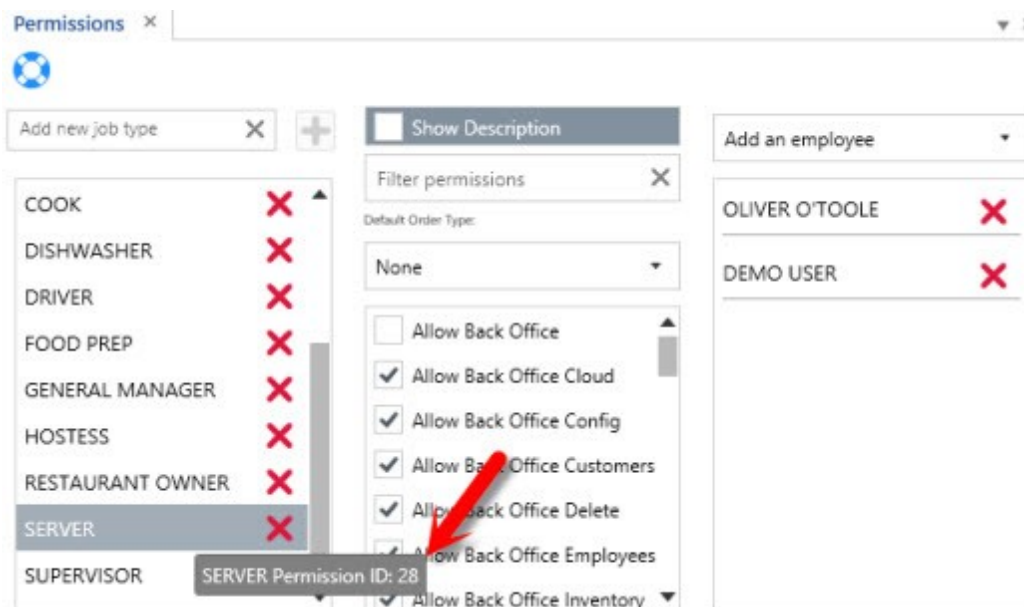
Employee Banking Settings	
Server Banking	Driver Banking
Server Banking Deduct Mandatory Gratuities	Yes
Server Gratuity Payout	SERVER TIPS
Server Job Type	SERVER
Server Payout Vendor	EMPLOYEE
Server Report Show Mandatory Gratuities	Yes
Server Report Show Tips Collected	Yes
Server Report Ticket Details	Yes

Server Job Type
Select the permission name that corresponds with the server job type

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](#)²¹⁴ are enabled).

All Program Settings	
All Categories	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 Types	Item name contains
Server Payout Vendor	7
Server Permission	28
Server Report Show Mandatory Gratuities	<input checked="" type="checkbox"/>

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.



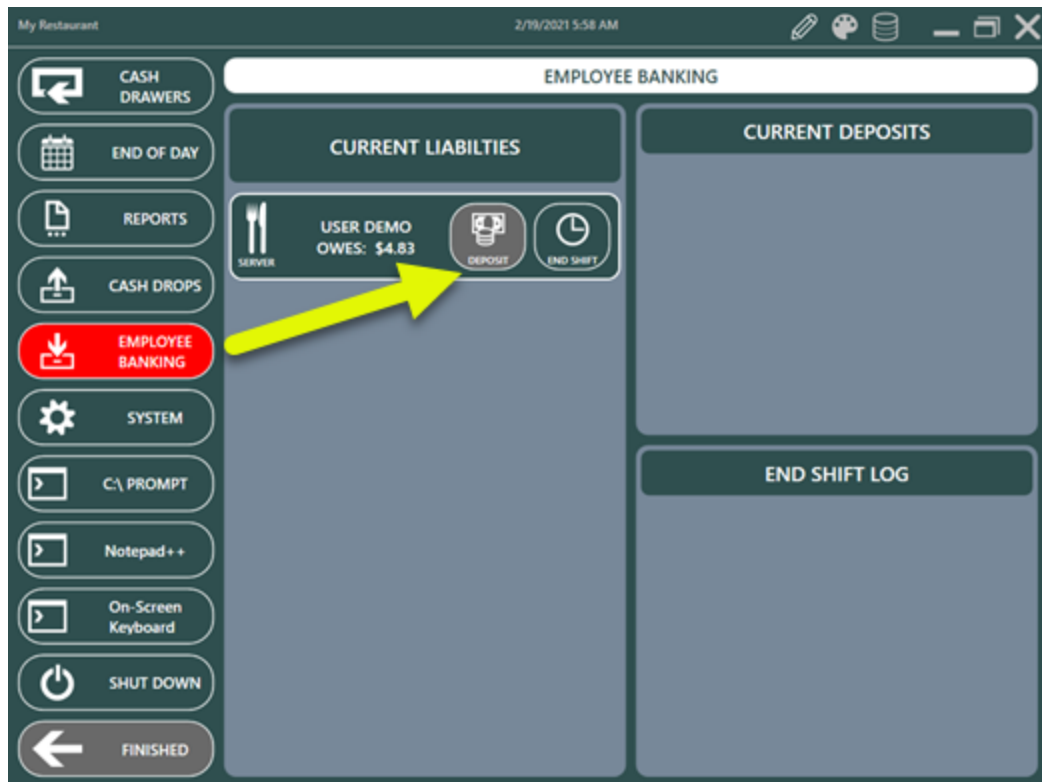
Order Check-In

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**.



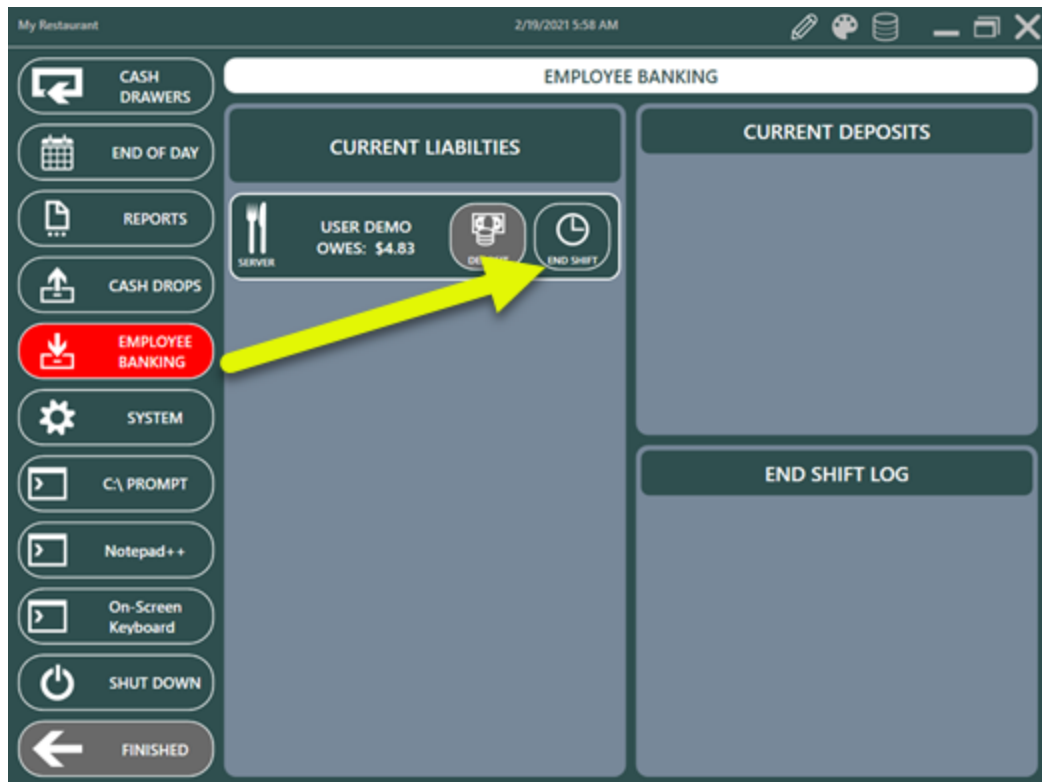
Server Deposits

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**.

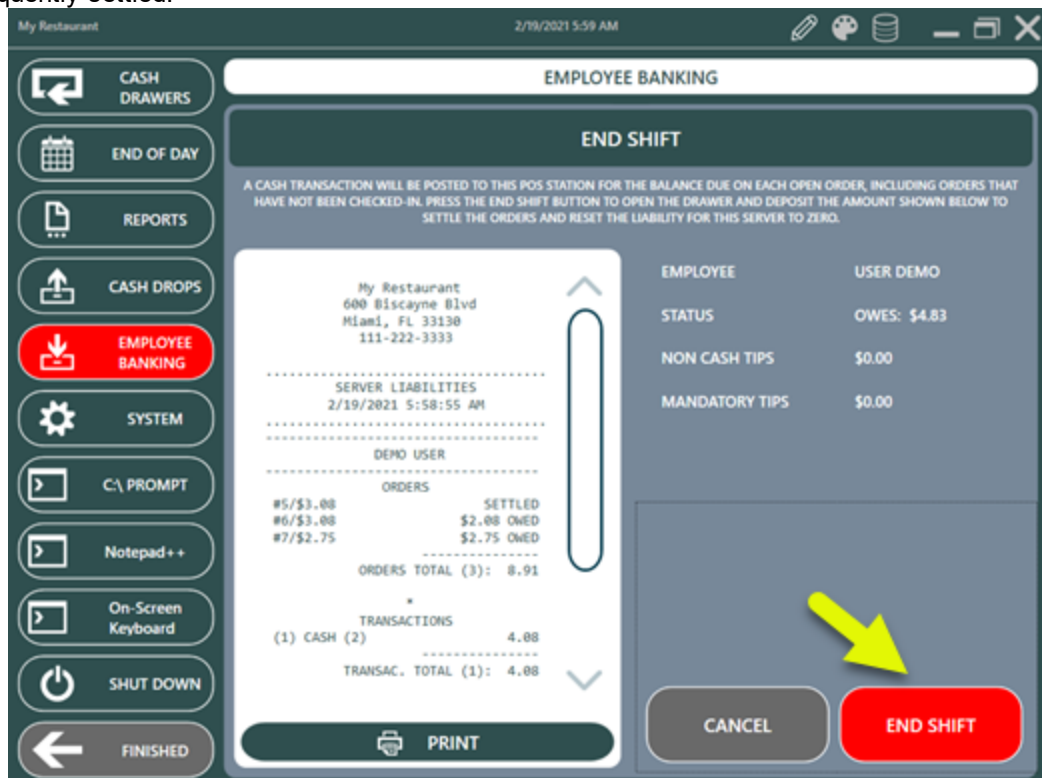


End Shift

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.



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.



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](#) ⁽²¹⁸⁾ 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
.....
```

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.

My Restaurant2/19/2021 6:03 AM

CURRENT STATUS

SCHEDULE

BANK REPORT

TIME CARD

NON-CASH GRATUITIES

FINISHED

SERVER LIABILITIES

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

SERVER LIABILITIES
2/19/2021 6:04:04 AM

DEMO USER

ORDERS	
#5/\$3.08	SETTLED
#6/\$3.08	\$2.08 OWED
#7/\$2.75	\$2.75 OWED
ORDERS TOTAL (3): 8.91	
* TRANSACTIONS	
(1) CASH (2)	4.08
TRANSACTIONS TOTAL (1): 4.08	
DEMO USER OWES: \$4.83	

PRINT

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

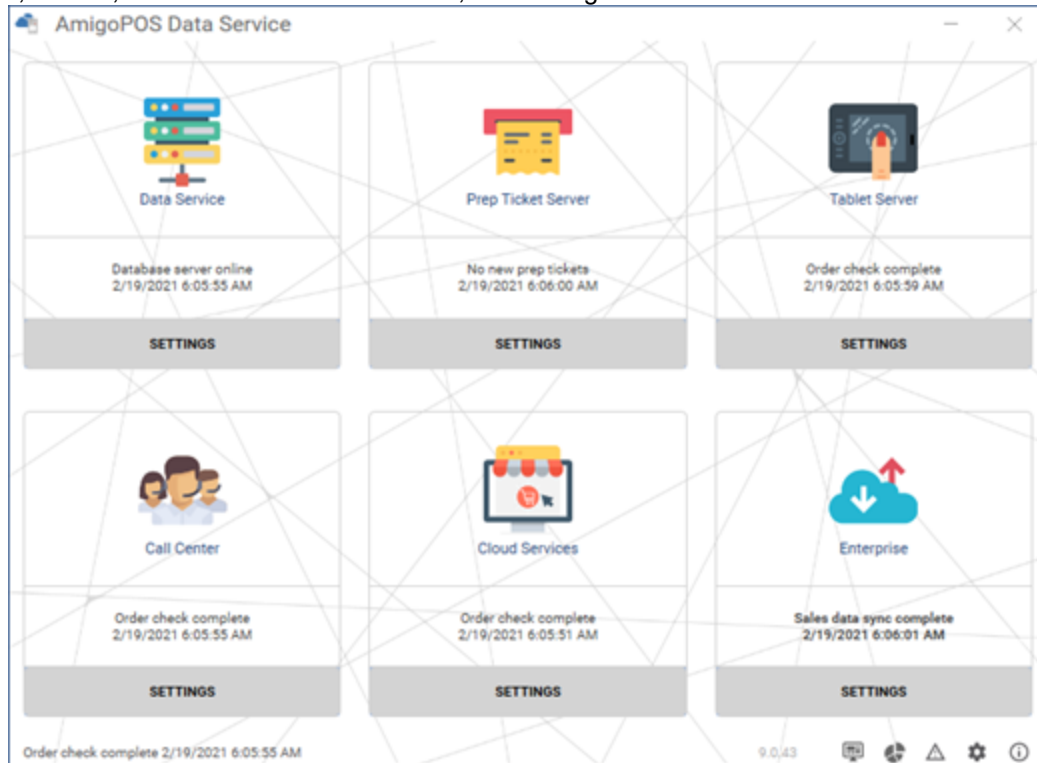
KRIS K. OWES: \$8.20

Data Service

12 Data Service

12.1 Overview

The AmigoPOS Data Service is a stand-alone Windows application that provides data to the pos stations, tablets, back office and other utilities, eliminating the need for a direct database connection.



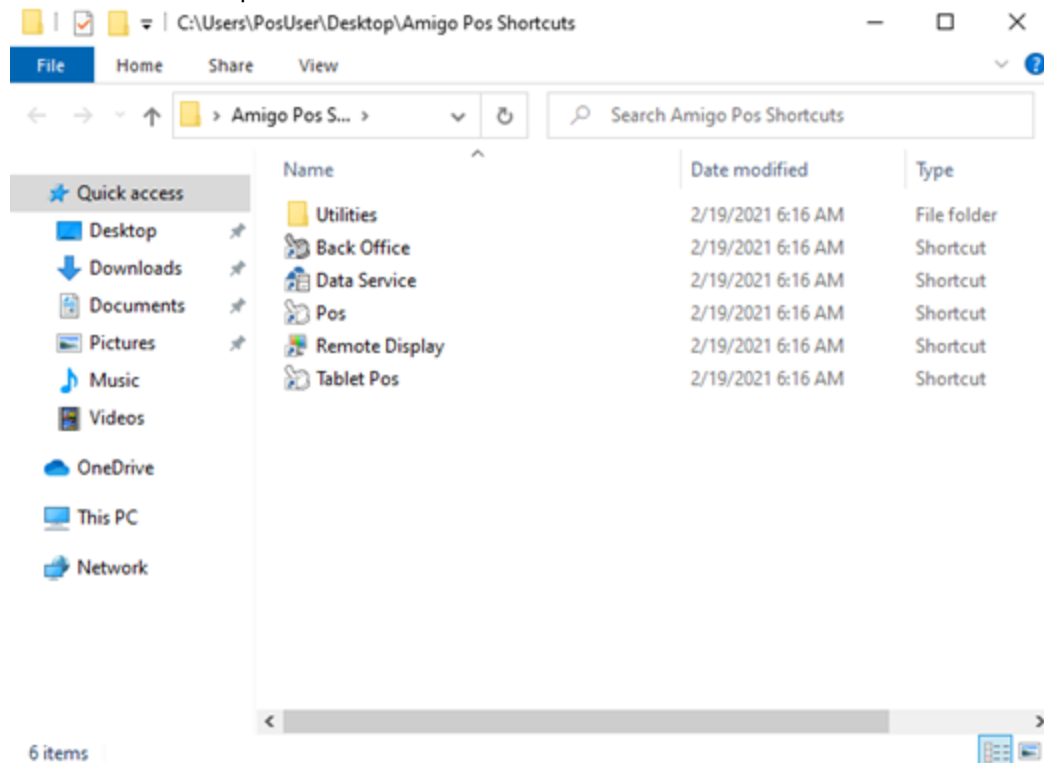
- [Database Connectivity](#)^[230]: The Data Service application is the only application that connects to the database. All other applications connect to the Data Service to retrieve and submit data.
- [Tablet Server](#)^[235]: Is a direct replacement for the current tablet server application
- [Call Center](#)^[239]: Is a direct replacement for the current call center client application
- [Online Ordering](#)^[237]: Is a direct replacement for the current online ordering client application
- [Enterprise Data](#)^[239]: Provides real-time data synchronization between the local database and the enterprise cloud service
- [Prep Ticket Server](#)^[236]: Manages all prep print jobs and eliminates the need to install prep printers at each pos station.

12.2 Current Users

Current AmigoPOS 8 users can begin using the data service application instead of a direct database connection by completing the steps below. The data service application is now in late beta testing, where all known issues have been fixed, but new issues may occur. Issues are generally fixed within 1 day of being reported.

*Note that the SQL Native Client database driver is no longer required except when using the QuickBooks interface, which is not yet compatible with the data service application.

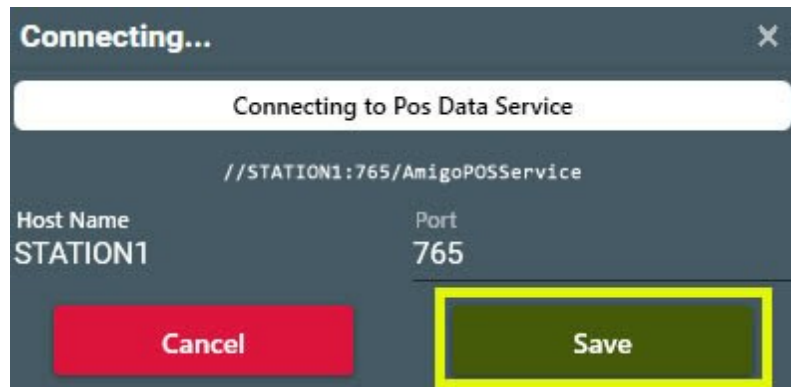
1. Run the data service application at the main pos station where SQL Server Express is running, add a firewall exception for port 765 and set the application to start automatically with Windows, as described at the [next help topic](#)^[230]. Database configuration is not necessary, since the data service application uses the same database settings as AmigoPOS.
2. If the pos application is set to start automatically with Windows, delete the shortcut from the Program Files Startup Folder. Verify that the data service is running at the main pos station and run the pos application from the desktop shortcuts folder.



Applications that are compatible with the data service will display a small connection dialog at startup so that a connection can be established by entering the host name and port.



Enter the name of the computer where the data service application is running. The default port should be changed only if the data service application is configured to communicate using a different port. The pos will connect to the data service after a few seconds.

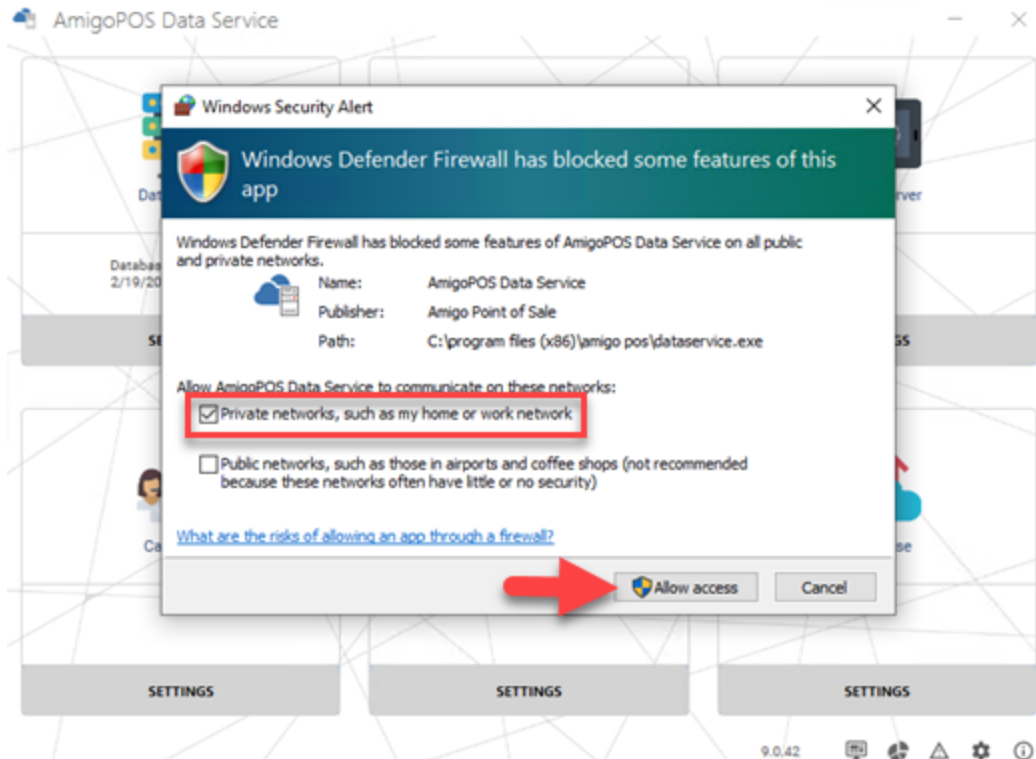


Repeat this procedure for both the back office and remote display applications. Always use the shortcuts in the Program Files Startup Folder to run the back office and remote display applications so that the application does not attempt a direct database connection at program startup.

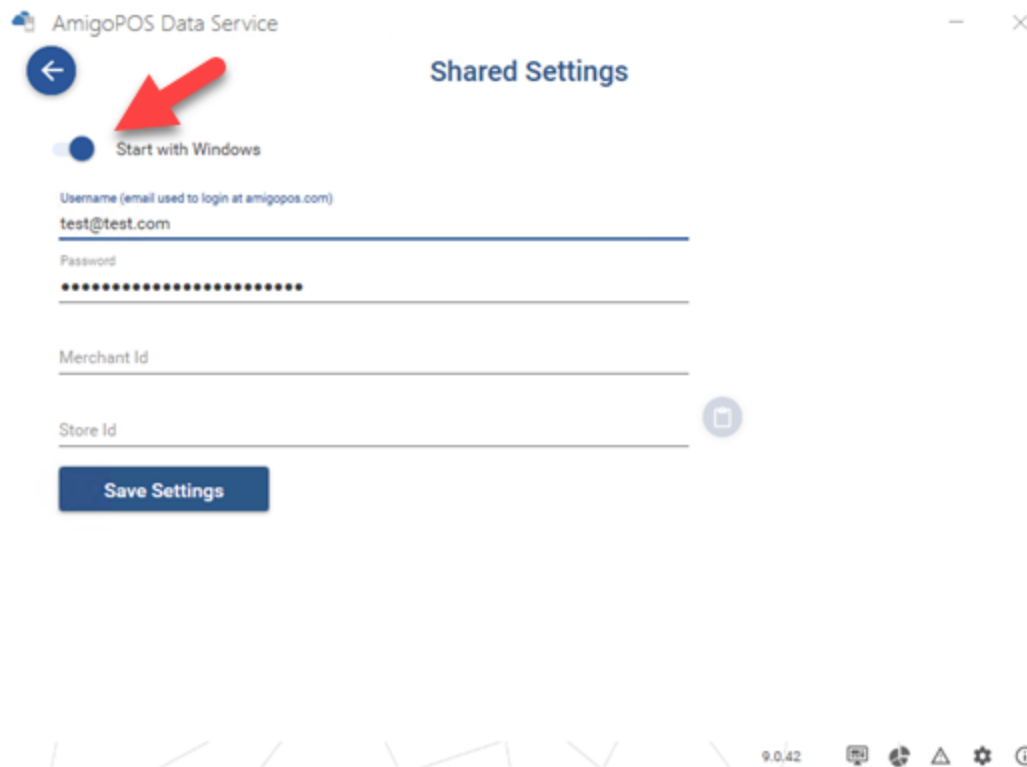
12.3 Host Settings

Run the AmigoPOS Data Service application only on the computer where the database server is installed.

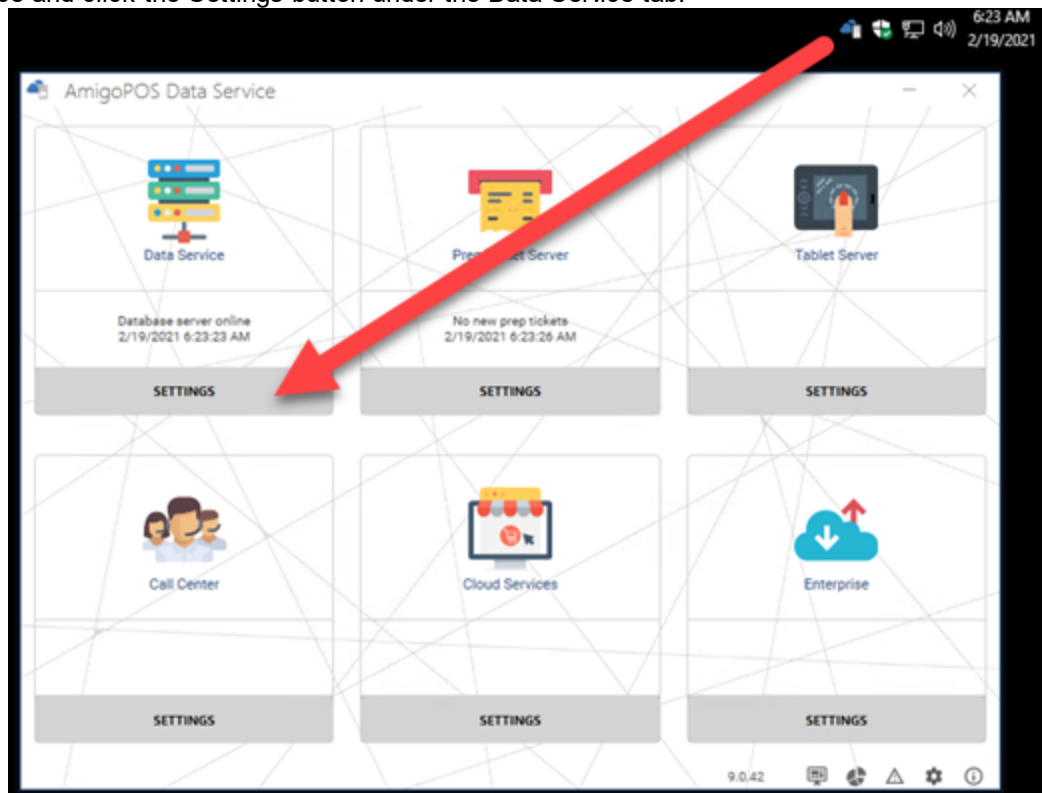
Windows Defender Firewall will display a security alert. The AmigoPOS Data Service application communicates on the local network using port 765. Check the box to allow communication on private networks and click Allow Access. Note that other firewall applications may not display a notification, in which case an exception must be added to allow local network communications using the TCP protocol on port 765.



Click the gear icon at the bottom right to display the settings and set the application to start automatically with Windows.



Reboot the computer, double-click the Data Service icon in the Windows taskbar to activate the user interface and click the Settings button under the Data Service tab.



Note the host name and network port and click the arrow to return to the main screen. The Host Name should match the computer's Windows name as displayed in Windows Control Panel/System.

AmigoPOS Data Service

Data Service Settings

Settings Database Backup Tools Clear Data Sql Query

Computer Name
STATION1

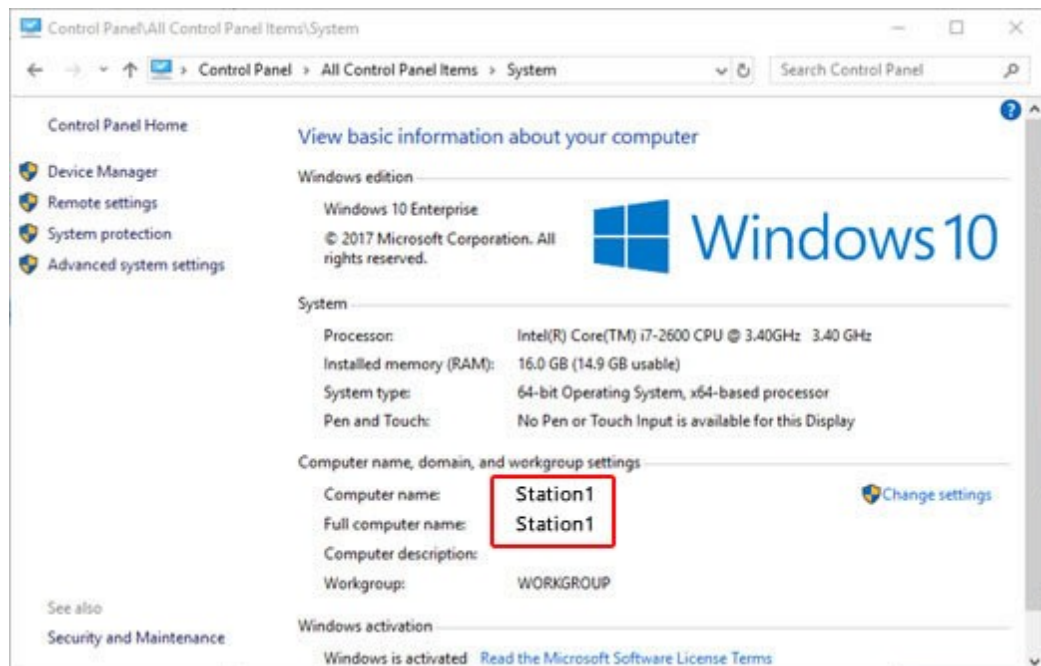
Network Port
765

SQL Server Express Database Server
STATION1\AmigoPos

Database Name
MyRestaurant

Save and test

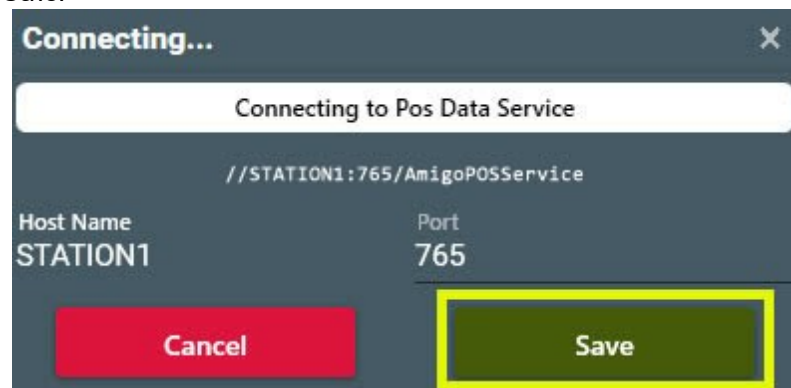
9.0.42



Run the pos, tablet pos and back office at each computer. Click the Settings button at the bottom of the connection window.



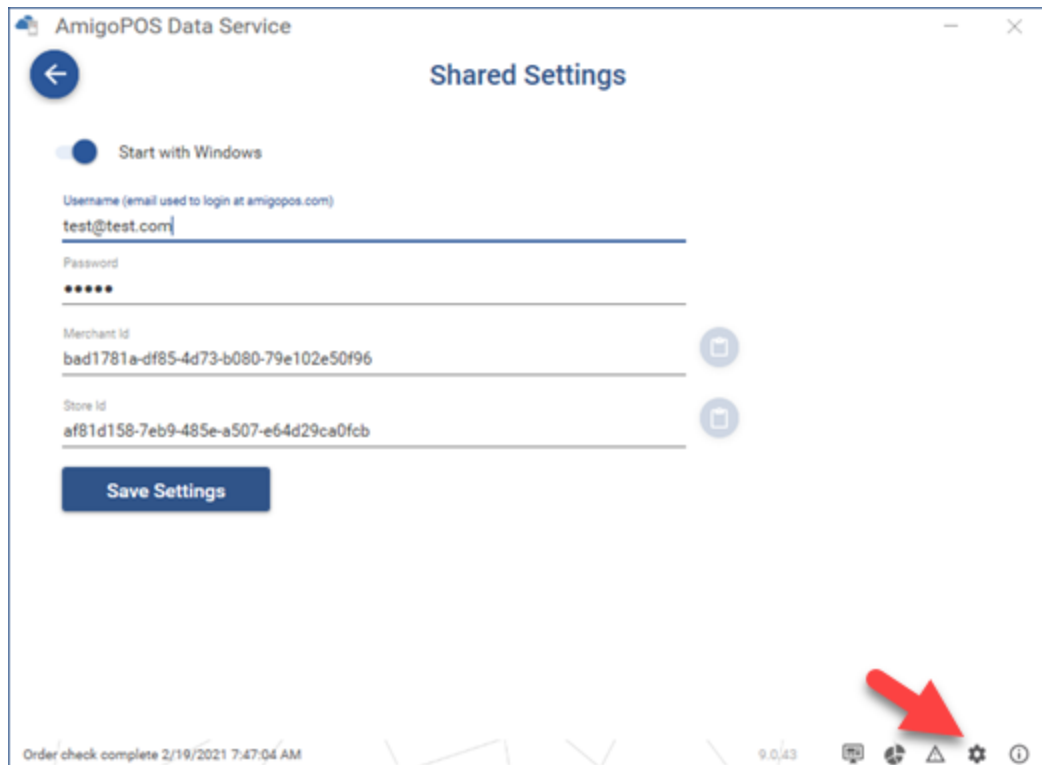
Verify that the Host Name and Port match the settings that are displayed in the Data Service settings screen and click Save.



12.4 Call Center

The call center client is used to upload the menu and store settings to the call center cloud service and to download orders and store messages from the call center cloud service. Complete the following steps to begin using the call center client.

Run the AmigoPOS Data Service application and click the settings button at the bottom right and enter the merchant id and store id as displayed in the call center cloud service subscription email. Click Save Settings and the left arrow to return to the main screen.



AmigoPOS Data Service

Shared Settings

☒ Start with Windows

Username (email used to login at amigopos.com)
test@test.com

Password

Merchant Id
bad1781a-df85-4d73-b080-79e102e50f96

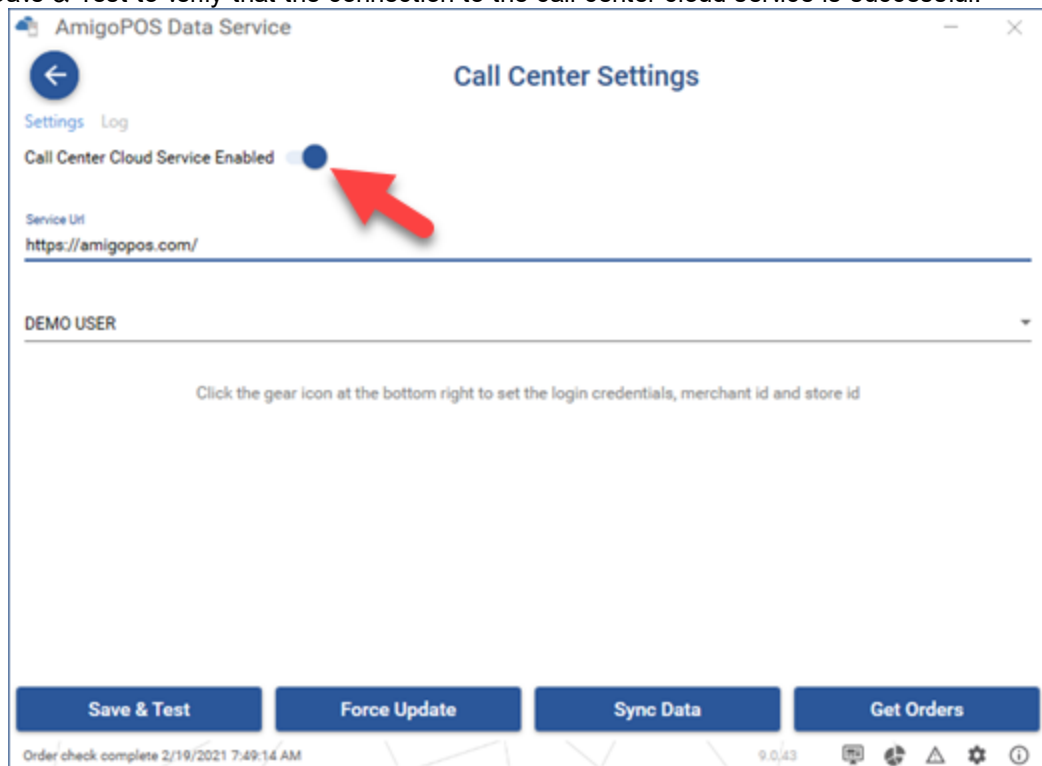
Store Id
af81d158-7eb9-485e-a507-e64d29ca0fcb

Save Settings

Order check complete 2/19/2021 7:47:04 AM

9.0.43

Click the call center settings button on the main screen and enter the service url as displayed in the call center cloud service subscription email. Select the user that is used to save new call center orders and click Save & Test to verify that the connection to the call center cloud service is successful.



AmigoPOS Data Service

Call Center Settings

Settings Log

Call Center Cloud Service Enabled ☒

Service Url
https://amigopos.com/

DEMO USER

Click the gear icon at the bottom right to set the login credentials, merchant id and store id

Save & Test Force Update Sync Data Get Orders

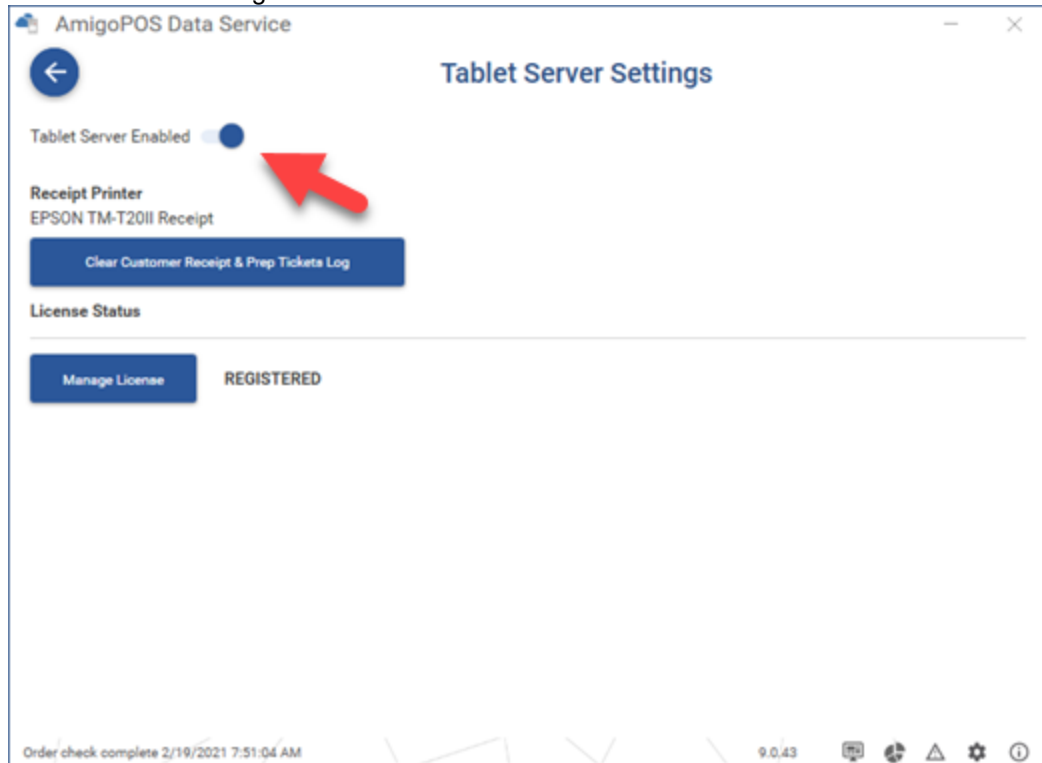
Order check complete 2/19/2021 7:49:14 AM

9.0.43

12.5 Tablet Server

The tablet server is used to receive orders from the tablet pos application. Complete the following steps to configure and license the tablet server at the pos station where the AmigoPOS Data Service application is running.

Click the tablet server Settings button and enable the tablet server.



Click the Manage License to open the licensing dialog and complete the steps displayed in the tablet server order confirmation email.

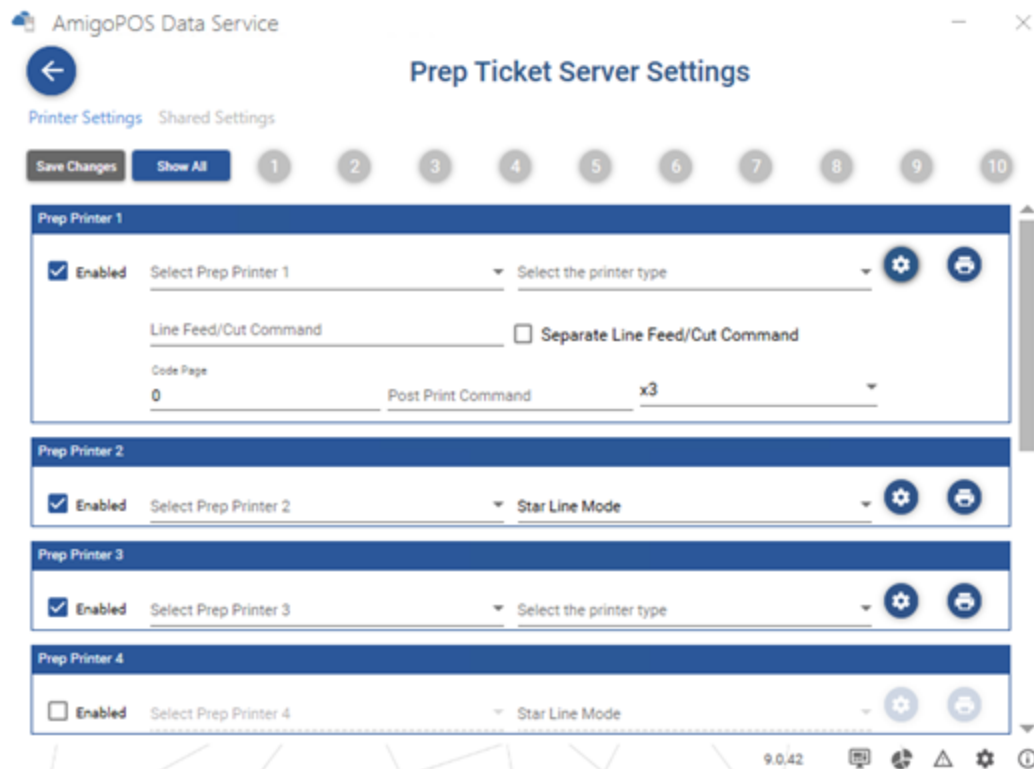


Enable the [customer receipt printer](#)^[385] in back office and configure the [prep ticket server](#)^[236] as described in the next help topic.

12.6 Prep Ticket Server

The prep ticket server simplifies the initial setup of prep printers by printing all prep tickets from the same computer. Prep printers are installed only at the computer where the AmigoPOS Data Service application is running. Complete the following steps to enable the prep ticket server.

1. [Install the prep printers](#)^[344] on the computer where the AmigoPOS Data Service application is running. Skip this step if prep printers are already installed and are in use with AmigoPOS.
2. Run the AmigoPOS Data Service application and enable the Prep Ticket Server service on the printer settings screen. Note that enabling the Prep Ticket Server service automatically disables prep ticket printing directly from the pos. Click the settings icon for each enabled printer and verify that the printer settings are correct.

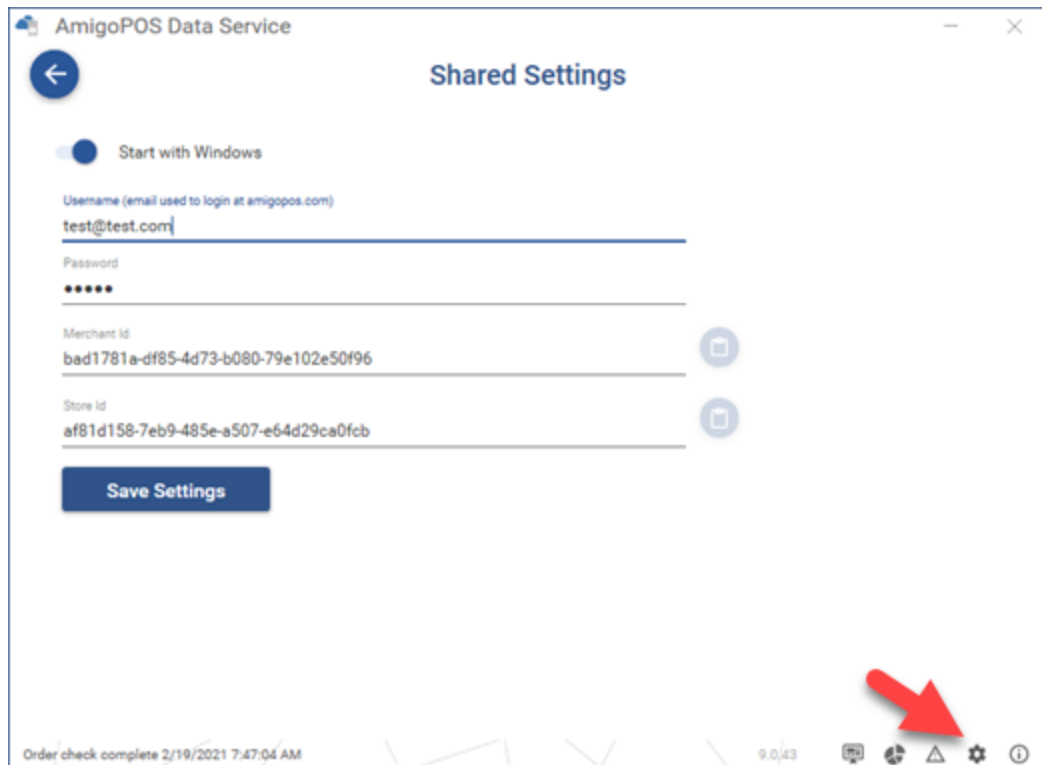


3. Verify that the AmigoPOS Data Service application is running and enter an order at any pos station. Allow 1-5 seconds for the prep tickets to begin printing.

12.7 Online Ordering

The online ordering client is used to upload the menu and store settings to the online ordering cloud service and to download orders from the online ordering cloud service. Complete the following steps to begin using the online ordering client.

Run the AmigoPOS Data Service application and click the settings button at the bottom right and enter the merchant id and store id as displayed in the online ordering cloud service subscription email. Click Save Settings and the left arrow to return to the main screen.



AmigoPOS Data Service

Shared Settings

☒ Start with Windows

Username (email used to login at amigopos.com)
test@test.com

Password

Merchant Id
bad1781a-df85-4d73-b080-79e102e50f96

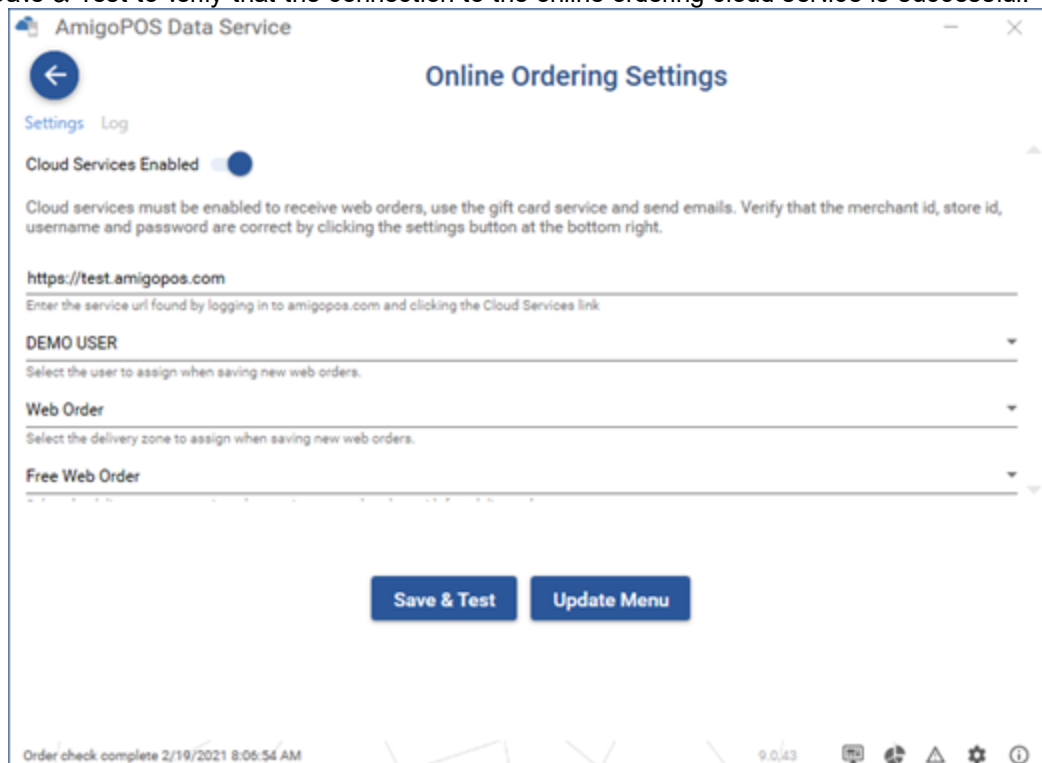
Store Id
af81d158-7eb9-485e-a507-e64d29ca0fcb

Save Settings

Order check complete 2/19/2021 7:47:04 AM

9.0.43

Click the online ordering settings button on the main screen and enter the service url as displayed in the online ordering cloud service subscription email. Select the user that is used to save new orders and click Save & Test to verify that the connection to the online ordering cloud service is successful.



AmigoPOS Data Service

Online Ordering Settings

Settings Log

Cloud Services Enabled ☒

Cloud services must be enabled to receive web orders, use the gift card service and send emails. Verify that the merchant id, store id, username and password are correct by clicking the settings button at the bottom right.

https://test.amigopos.com
Enter the service url found by logging in to amigopos.com and clicking the Cloud Services link

DEMO USER
Select the user to assign when saving new web orders.

Web Order
Select the delivery zone to assign when saving new web orders.

Free Web Order

Save & Test **Update Menu**

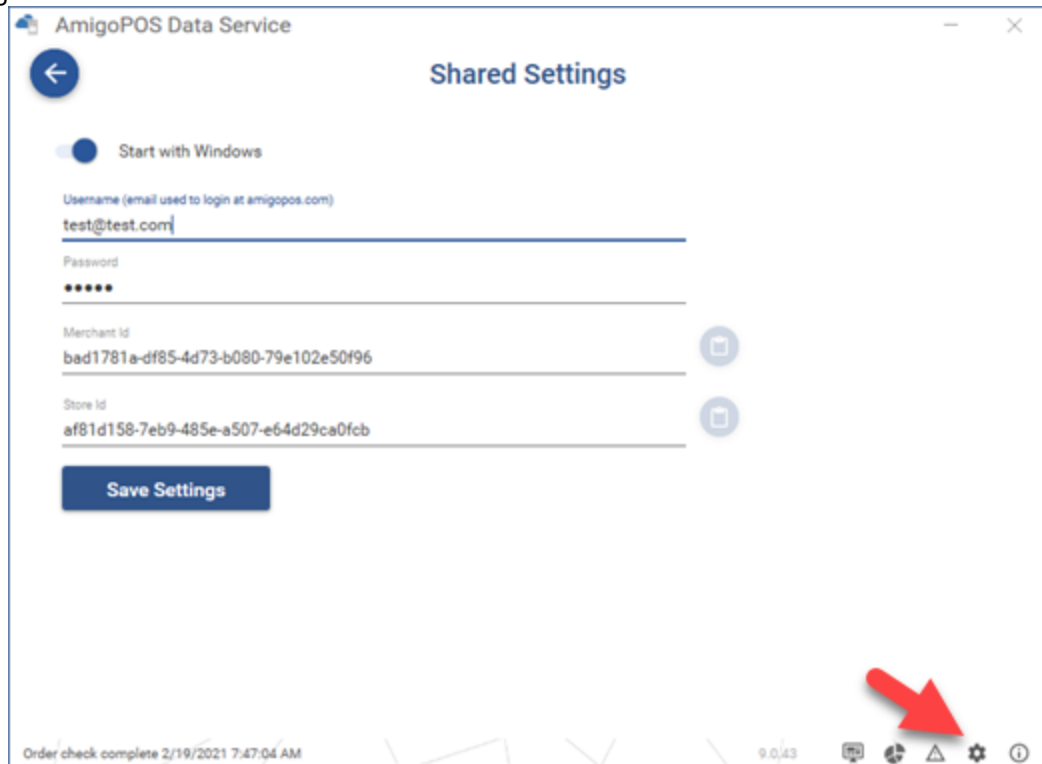
Order check complete 2/19/2021 8:06:34 AM

9.0.43

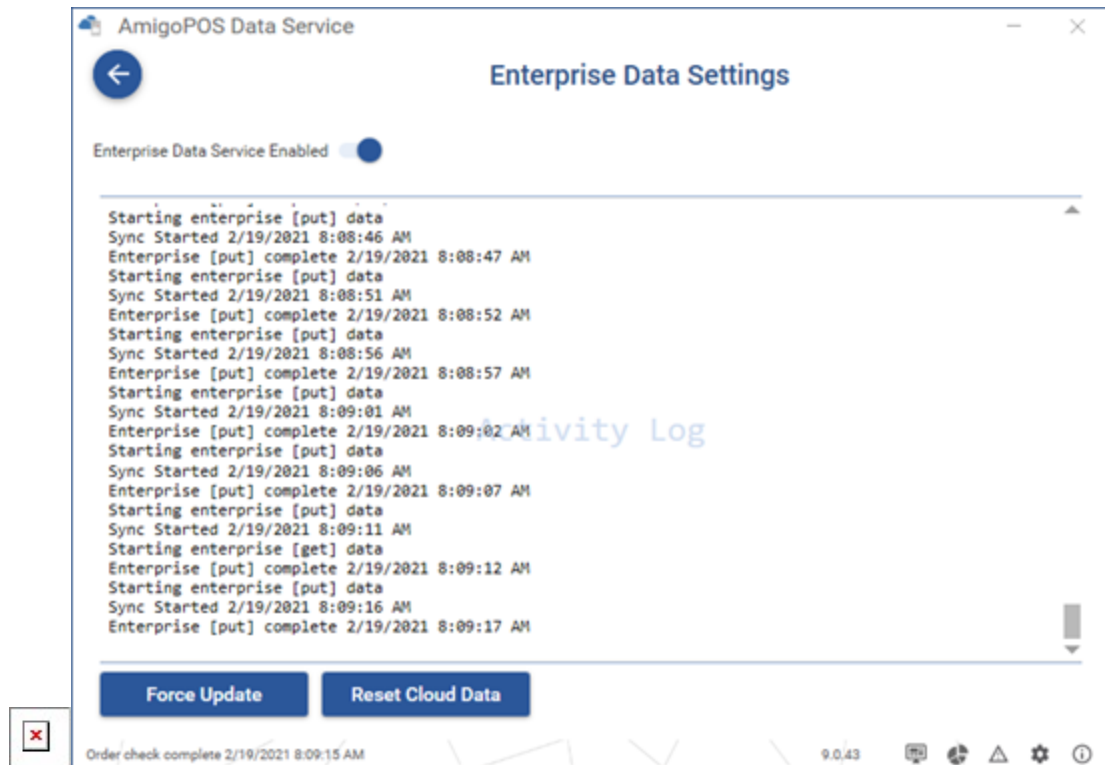
12.8 Enterprise

The enterprise client is used to send settings, menu, sales and data from each store to the AmigoPOS Enterprise cloud service. Complete the following steps to begin using the enterprise client.

Run the AmigoPOS Data Service application and click the settings button at the bottom right and enter the merchant id and store id as displayed in the enterprise cloud service subscription email. Click Save Settings and the left arrow to return to the main screen.



Click the enterprise settings button on the main screen and enter the service url as displayed in the enterprise cloud service subscription email and click Save & Test to verify that the connection to the enterprise cloud service is successful.



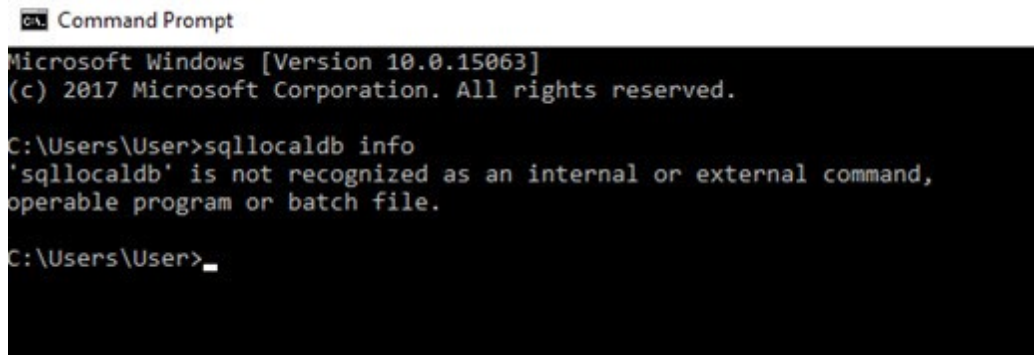
12.9 LocalDB

Microsoft SQL Server Express LocalDB is a lightweight database server that is primarily intended for developers but can be used as a reliable database server for systems with 3 or fewer pos stations or by users that simply wish to test AmigoPOS without installing SQL Server Express.

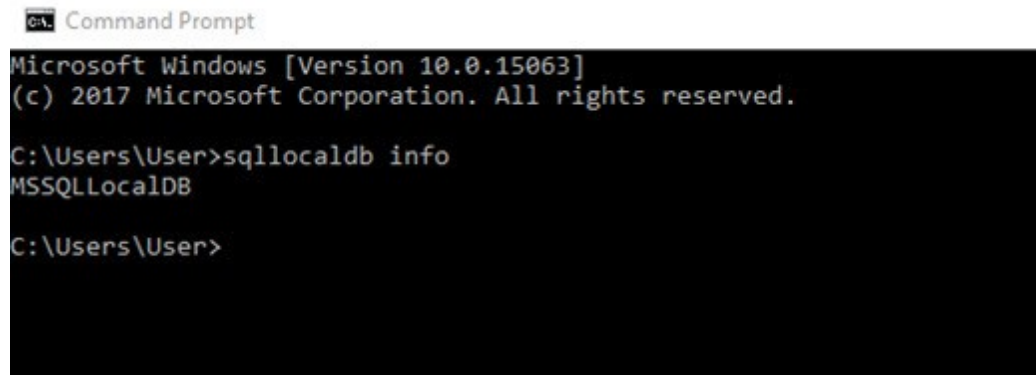
LocalDB can be installed in less than 1 minute and does not require any advanced configuration. Note that LocalDB requires **64-Bit** Windows. To begin, download Microsoft LocalDB 2017 directly from Microsoft [here](#). Install LocalDB at the main pos station where the data service application will run. To determine if LocalDB was previously installed on the computer, open a command prompt, type **SqlLocalDB info** and click Enter. If LocalDB is installed on the computer, one of the following will appear. If **MSSQLLocalDB** does not appear on the list, install LocalDB as described above.

- v11.0
- v12.0
- v13.0 and
- MSSQLLocalDB

The image below indicates the output when LocalDB has not been installed:



The image below indicates the output when LocalDB has been installed:



```

C:\> Command Prompt

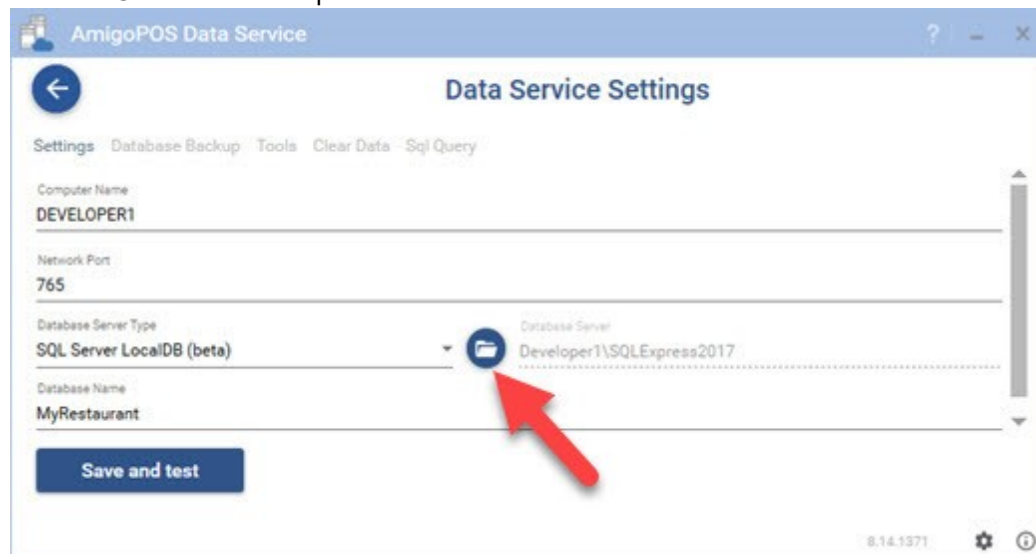
Microsoft Windows [Version 10.0.15063]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\Users\User>sqllocaldb info
MSSQLLocalDB

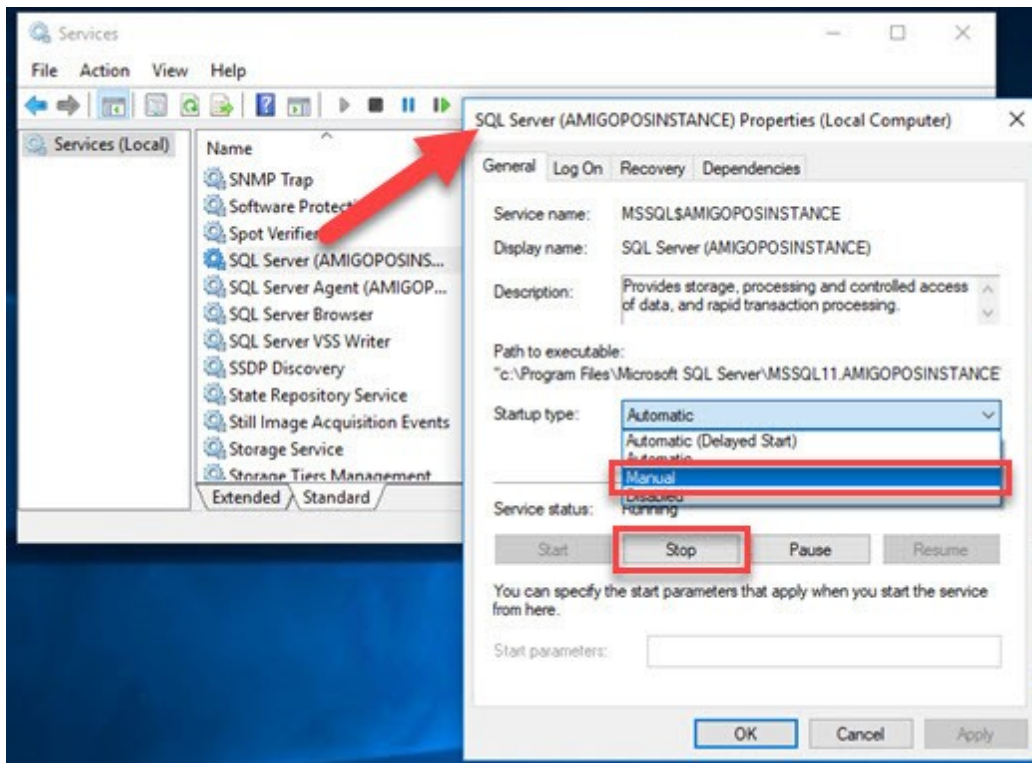
C:\Users\User>
  
```

Current AmigoPOS users with an existing SQL Server database:

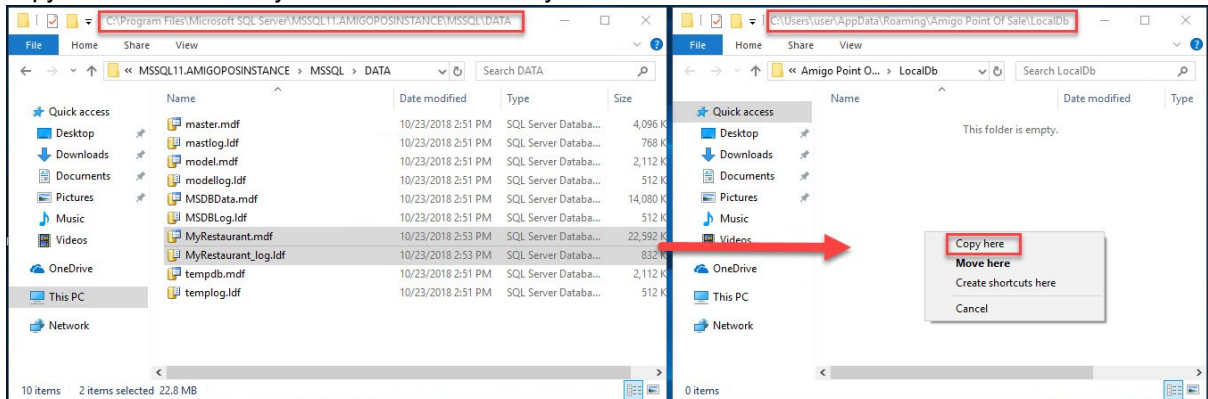
1. Open back office\settings\database setup and note the database name
2. Open the SQL Server Express data directory. On 64-Bit computers (when running 64-Bit SQL Server Express 2012), the data folder is located at **C:\Program Files\Microsoft SQL Server\MSSQL11.AmigoPosInstance\MSSQL\Data**, where AmigoPosInstance is the default named instance, but may be different on your computer.
3. Open the LocalDB data directory by clicking the browse folder button in the Data Service application or on the database connection error screen. The default location is **C:\Users\WindowsUserName\AppData\Roaming\Amigo Point Of Sale\LocalDb**, where WindowsUserName corresponds to the Windows.



4. Shut Down the SQL Server Express instance in Windows Control Panel\Administrative Tools\Services and set the service to start manually so that it does not consume system resources.



5. Copy the 2 files with the same name as the database found in step 1 from the SQL Server Express data directory to the LocalDB data directory. For example, if your database is named MyRestaurant, copy the files named MyRestaurant.mdf and MyRestaurant.ldf.



6. Open the Data Service application and select **SQL Server LocalDB** for the Database Type. The database name should be automatically filled in. If not, enter the same database name as determined in step 1. Click **Save and Test** to verify connectivity.

AmigoPOS Data Service

Data Service Settings

Settings Database Backup Tools Clear Data Sql Query

Computer Name
DEVELOPER1

Network Port
765

Database Server Type
SQL Server LocalDB (beta)

Database Server
Developer1\SQLEXPRESS2017

Database Name
MyRestaurant

Save and test

8.14.1371

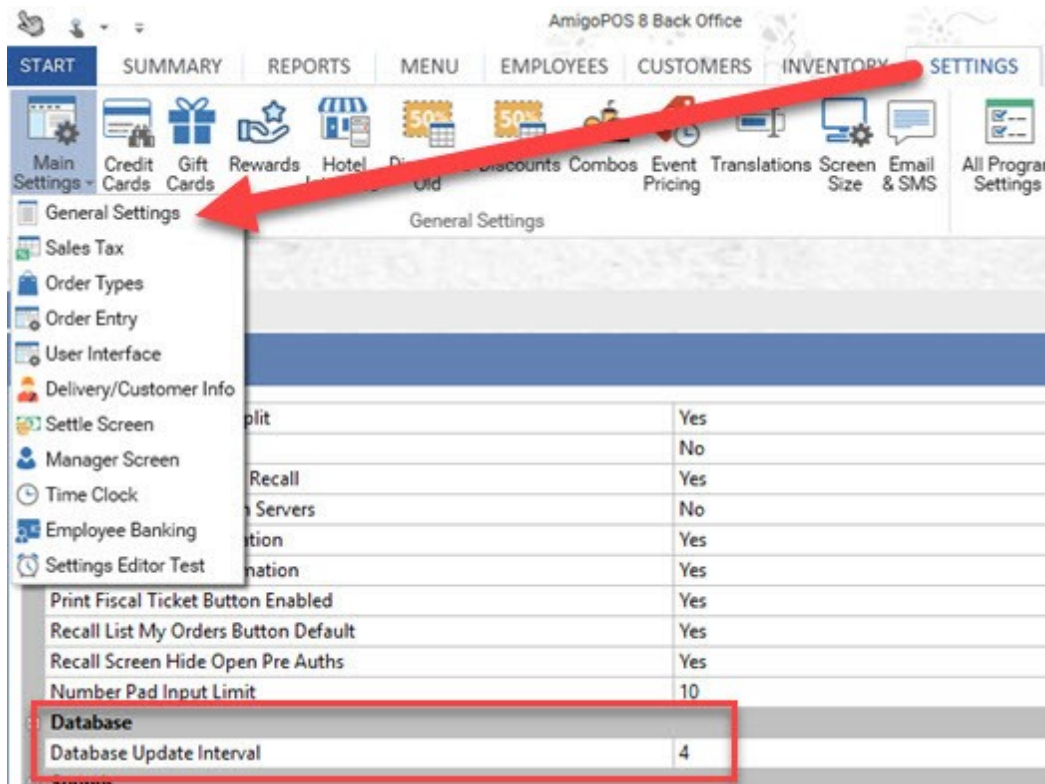
Database Backup & Restore

13 Database Backup & Restore

13.1 Synchronization

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 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.

To minimize network traffic and speed data access, a locally cached copy of commonly used data is created on each pos station at program startup. This cache is routinely discarded and replaced to reflect any changes to the main system database. The update interval is defined in Back Office | Settings | Main Settings | Security. The update occurs immediately after user login. During this update, a small message will appear at the top 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.



Speed Up Database Synchronization

The time required to perform database update varies with the size of the database and the availability of 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 or bar menu items) and other data that is not used. Sales history, transaction history and other logs do not affect database synchronization.

Forced Database Synchronization

In some cases you 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

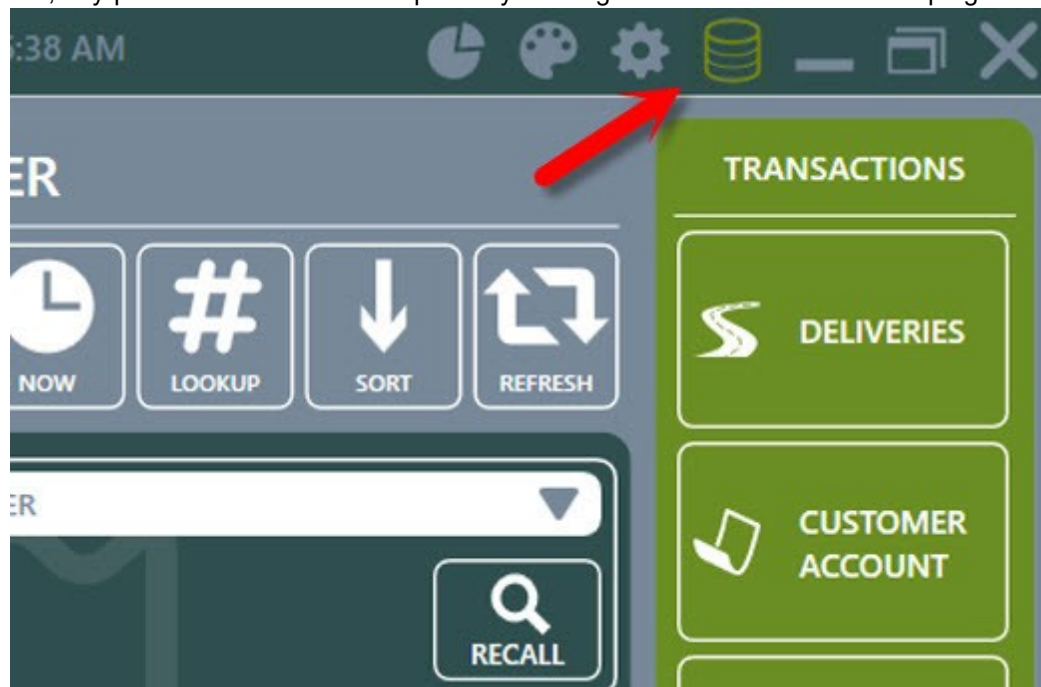
below. **Note that instant database updates are performed on the local computer only.** Click the Force Update button to synchronize all pos stations at the next user login.

Forced Database Update Keyboard Shortcuts

Click the **Update POS Stations** icon at the top right to force all pos stations to perform a database update at the next user login.



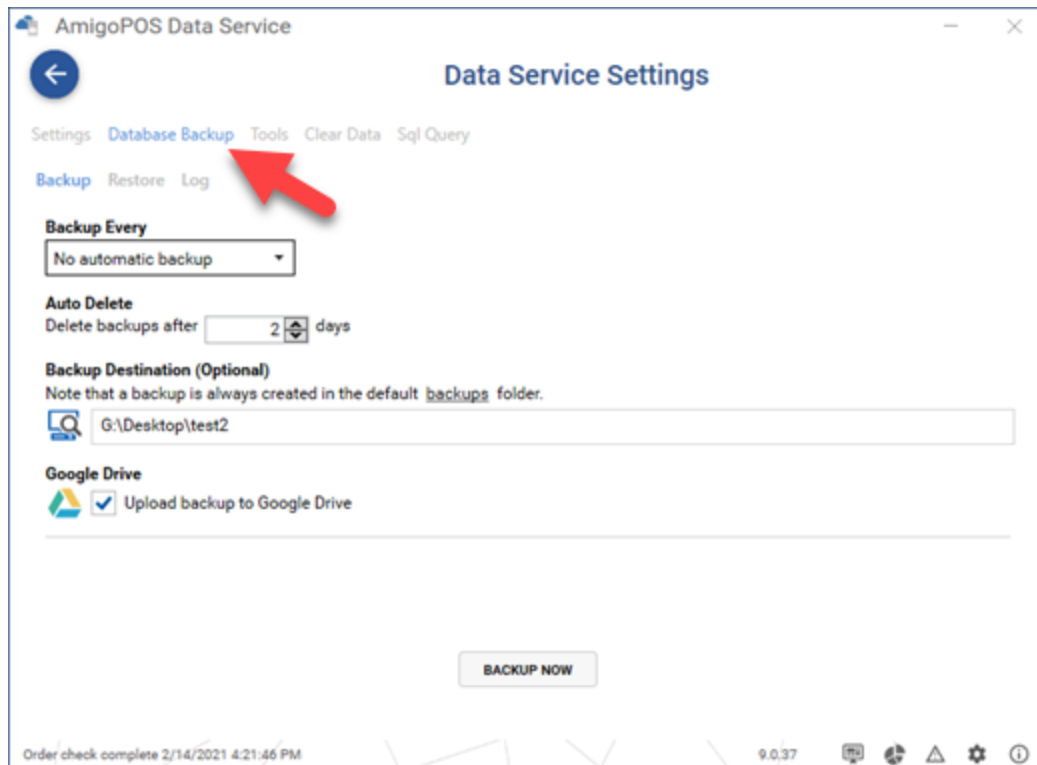
In addition, any pos station can force an update by clicking the database icon at the top right.



13.2 AmigoPOS Backup

13.2.1 Setup

The data service application includes the SQL Server Backup & Restore utility that can automatically backup the database. The utility is available by clicking Settings under the Data Service tab. Important note: If the database exceeds 100MB, a 3rd party backup and restore utility such as [SQL Backup Master Setup](#) ⁽²⁶⁾ is recommended for maximum reliability and performance. Utilities generally use the Windows task scheduler to automatically backup and compress the database on a daily basis and do not affect the performance of the pos or data service. 3rd party are free to use when backing up a single database to the local file system.



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 Database Backup tab:

- **Backup Every**
 - No automatic backup: Disable automatic backup
 - 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
 - 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 computer or removable USB flash drive, so that a backup is available in the event of local disk failure.













- [Google Drive](#)³⁷: 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	5/22/2017 5:14:00 PM	7138355 Bytes		
AmigoPOS2017522134859.zip	5/22/2017 1:49:00 PM	7138352 Bytes		
AmigoPOS2017522134843.zip	5/22/2017 1:48:44 PM	7138341 Bytes		
AmigoPOS2017522134833.zip	5/22/2017 1:48:34 PM	7137766 Bytes		
AmigoPOS2017522134827.zip	5/22/2017 1:48:28 PM	7138663 Bytes		
AmigoPOS2017522132611.zip	5/22/2017 1:26:12 PM	7138665 Bytes		

Database Restore

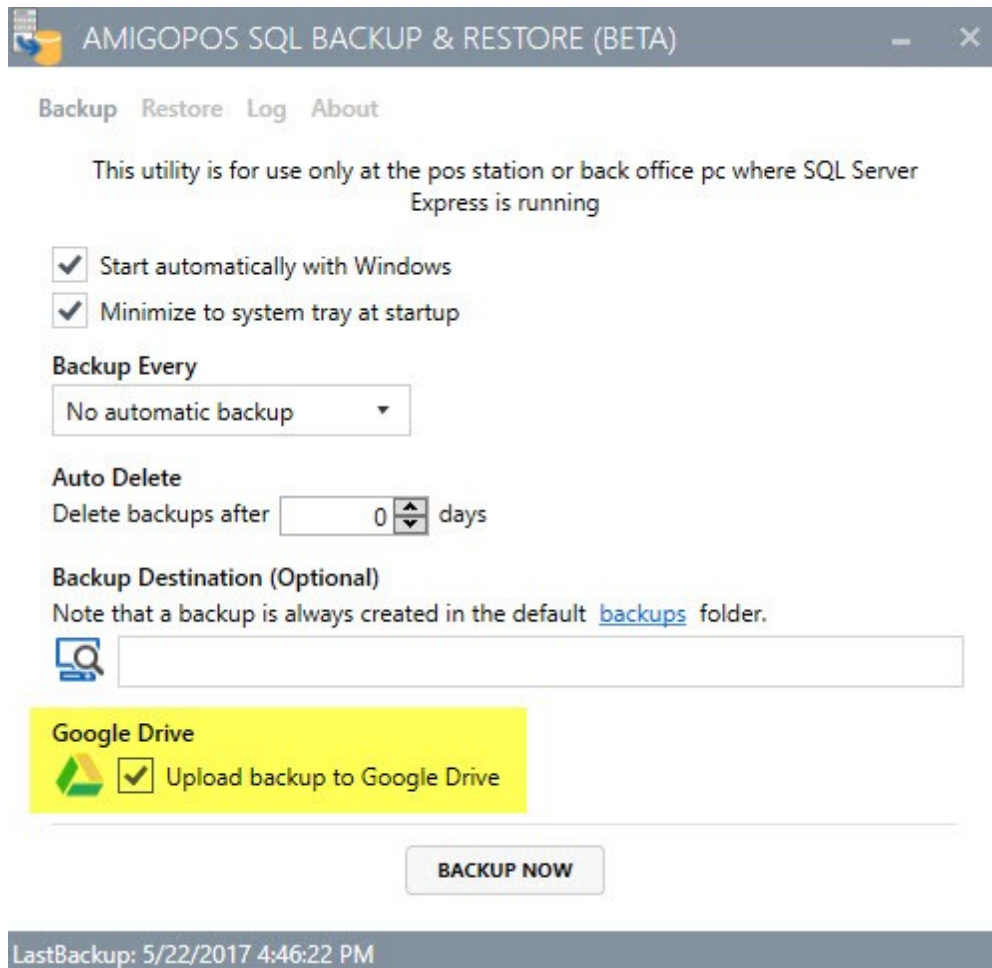
Click the Restore tab to view a list of all database backups that are located in the AmigoPOS SQL Backups folder. The files are ordered by date with the most recent backup at the top of the list. Each compressed backup file name includes the database name and the backup date and time, i.e. DatabaseNameYMDhms.zip.

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.

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'. Under 'Auto Delete', 'Delete backups after' is set to '0' days. Under 'Backup Destination (Optional)', a note says 'Note that a backup is always created in the default [backups](#) folder.' and there is a search icon and an empty text box. A yellow box contains the Google Drive logo, a checked checkbox, and the text '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.



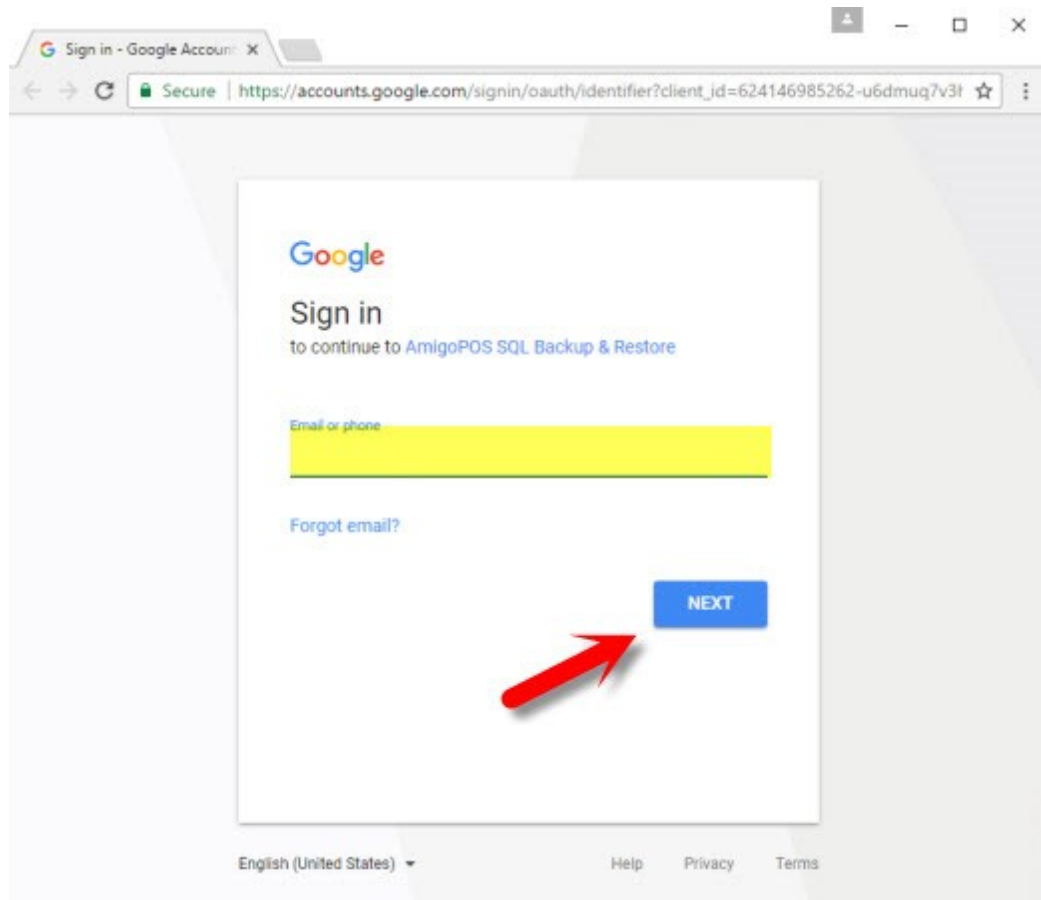
Google Drive

☒ Upload backup to Google Drive

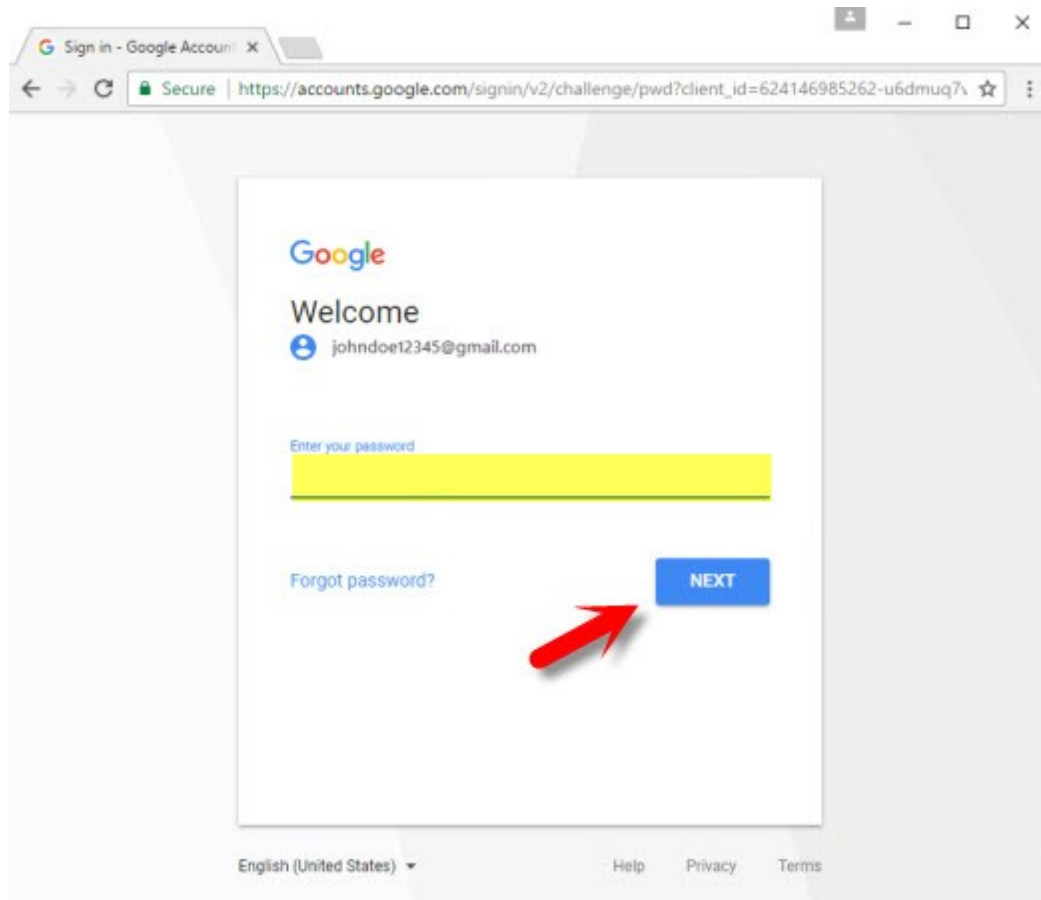
BACKUP NOW

LastBackup: 5/22/2017 4:46:22 PM

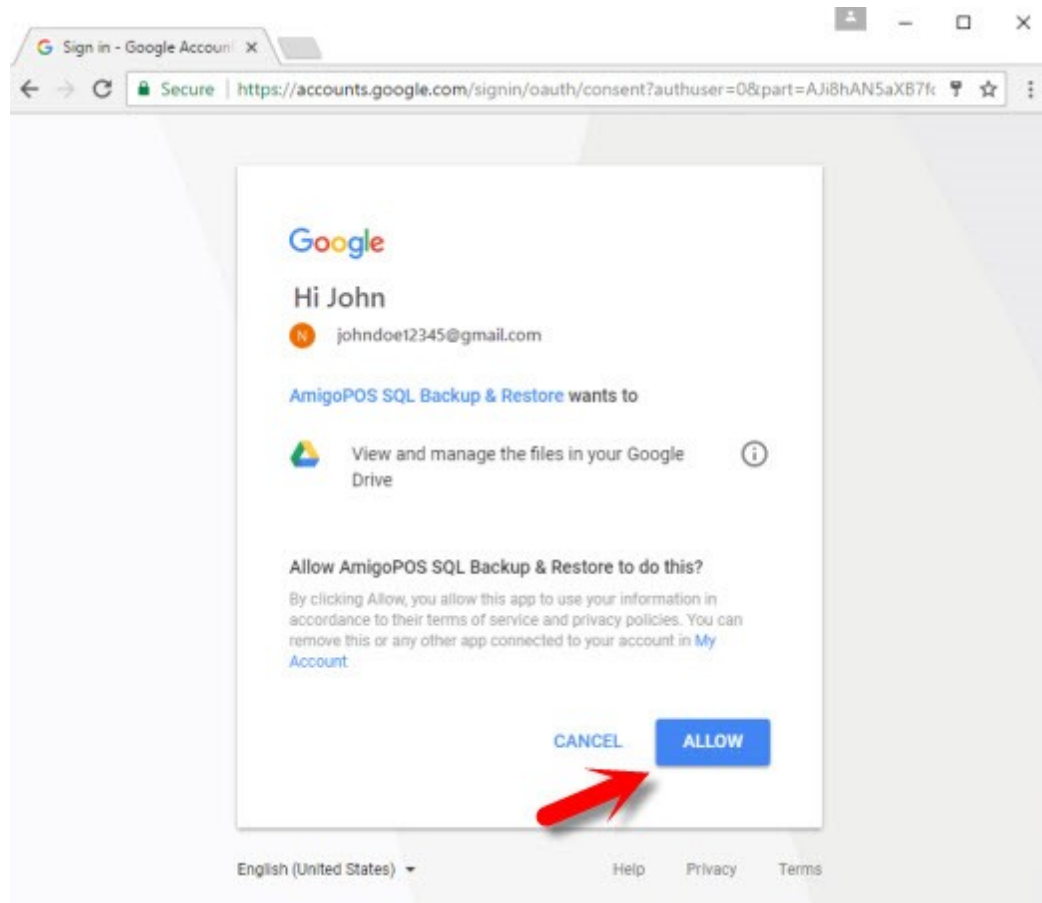
Click Backup Now to create a backup. A web browser will automatically launch prompting the user for the Google email or phone. Enter the email or phone and click **Next** to continue.



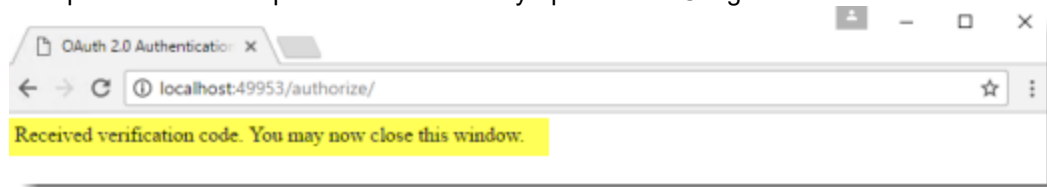
Enter the password and click **Next** to continue.



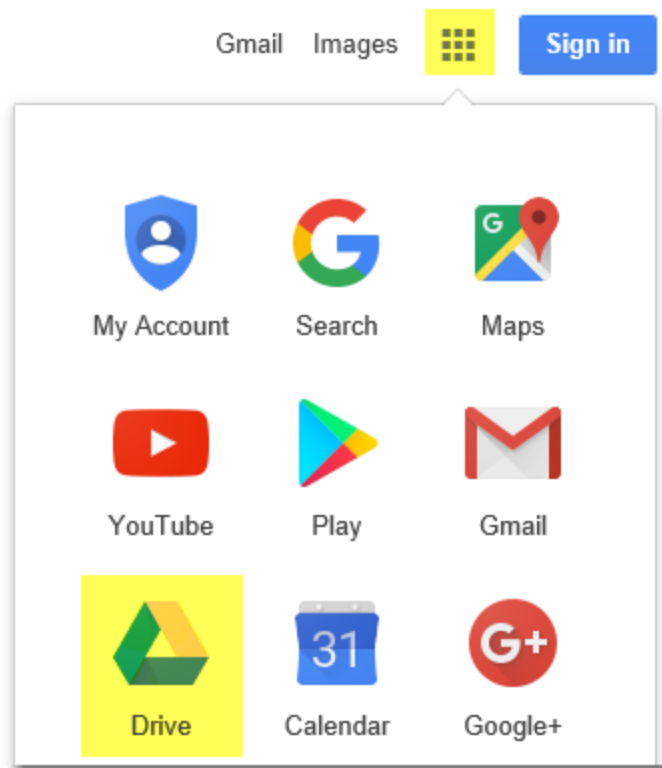
Verify that you are giving access to AmigoPOS SQL Backup & Restore by clicking **Allow**.



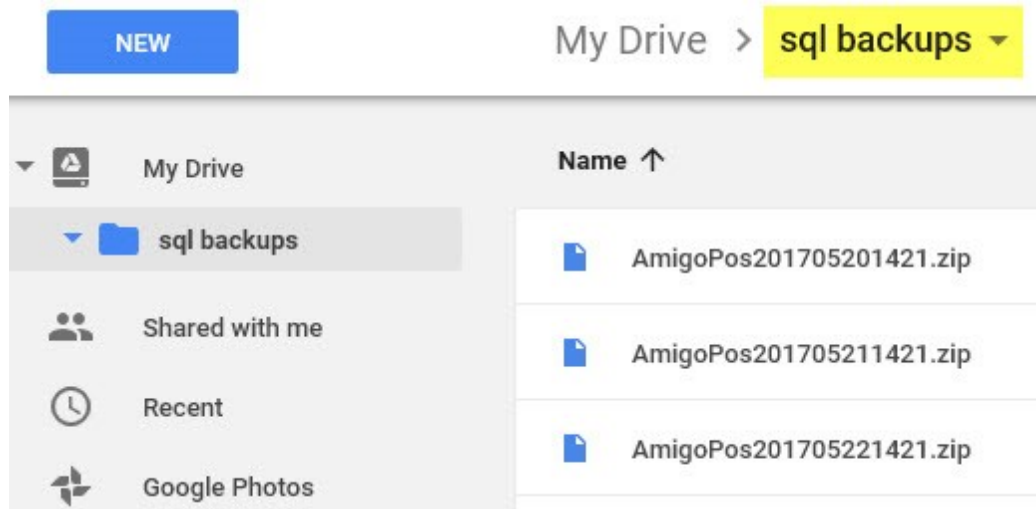
Set is complete and a backup will be automatically uploaded to Google Drive.



Login to Google and click the Google Drive icon.

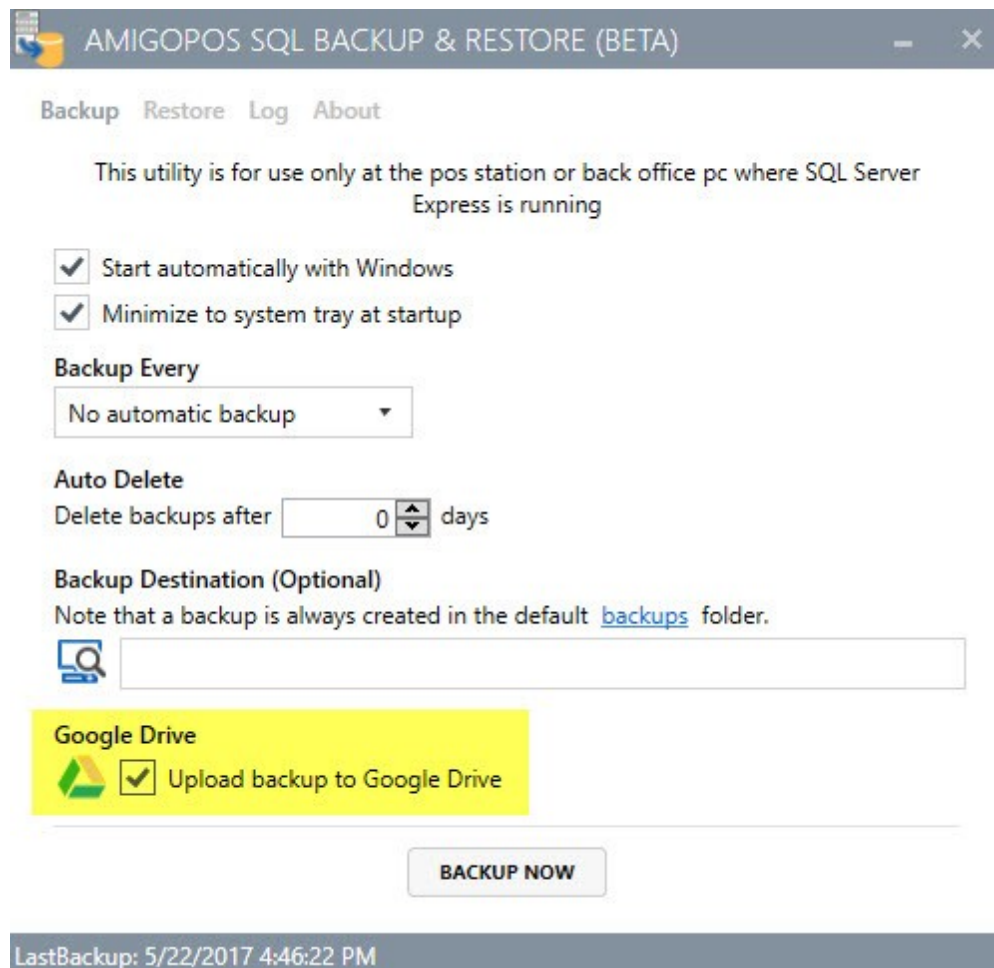


Create a backup and verify that it appears in the **My Drive | sql backups** folder.



13.2.2 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 that backups are created in the default 'backups' folder and a file explorer icon next to an empty text box. A yellow box highlights the 'Google Drive' section with 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.



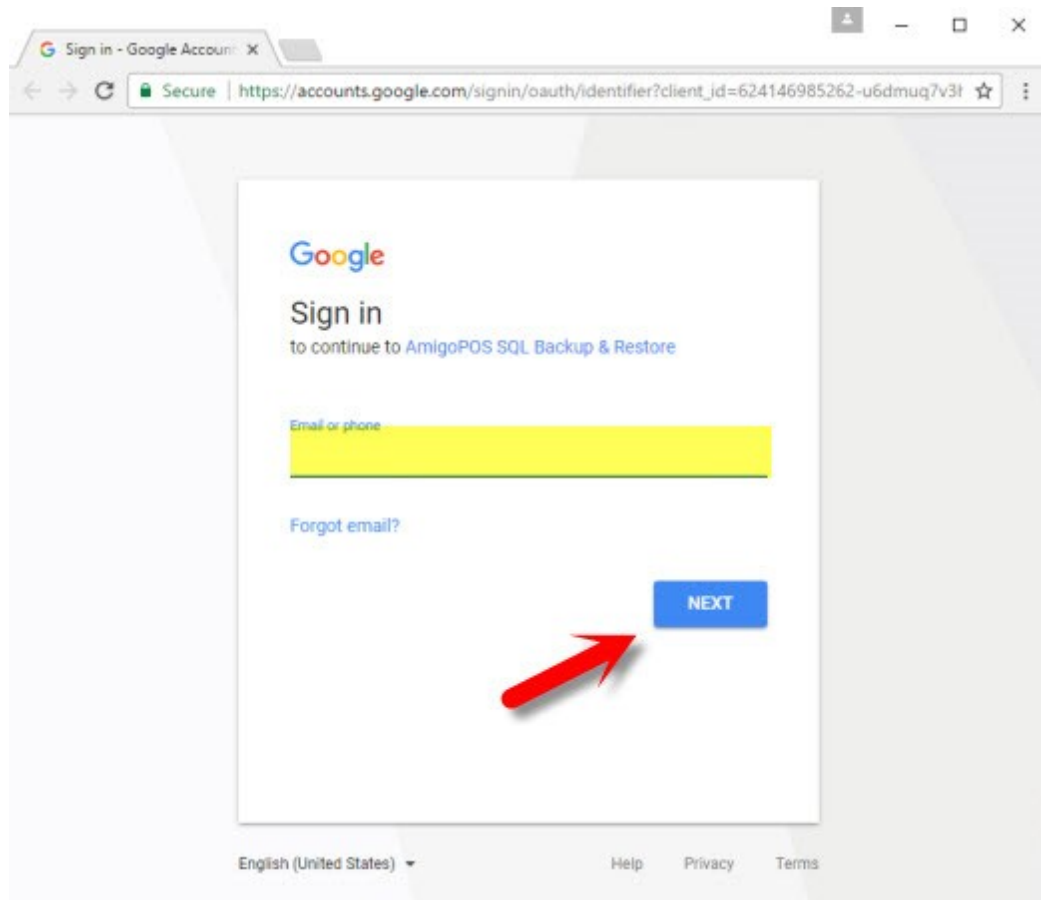
Google Drive

☒ Upload backup to Google Drive

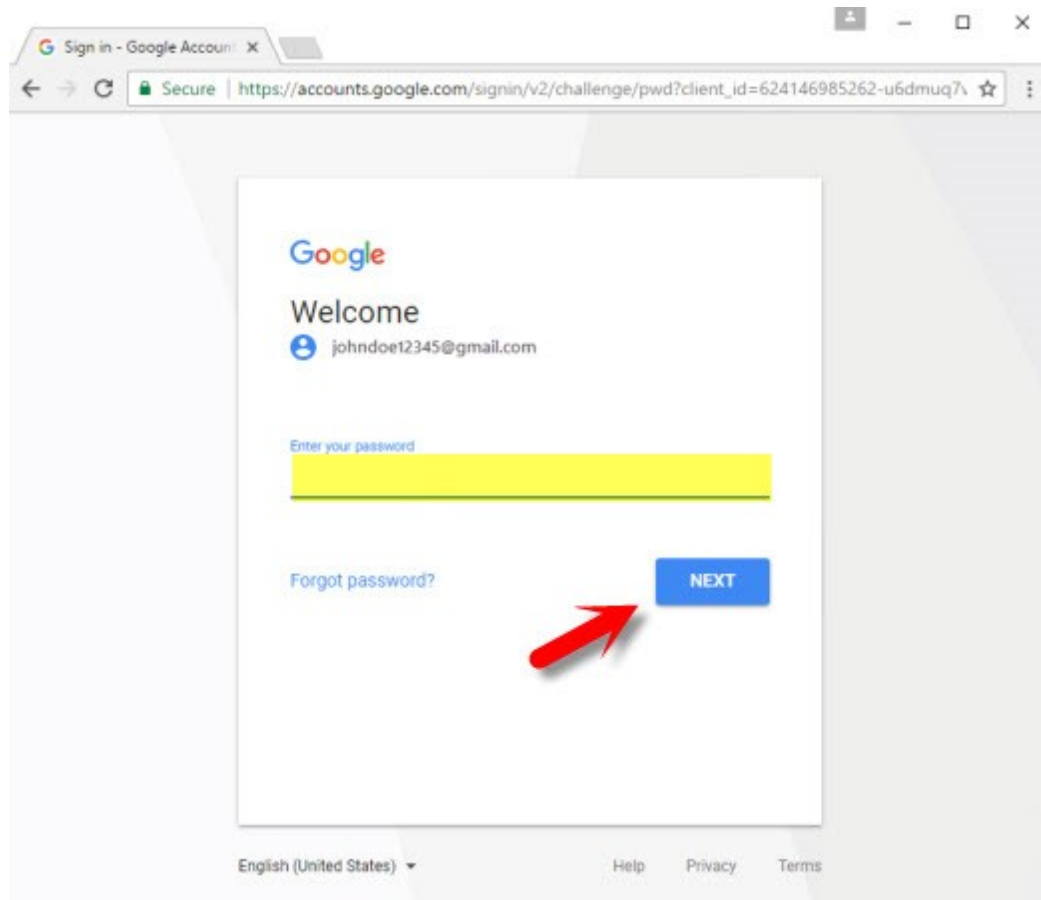
BACKUP NOW

LastBackup: 5/22/2017 4:46:22 PM

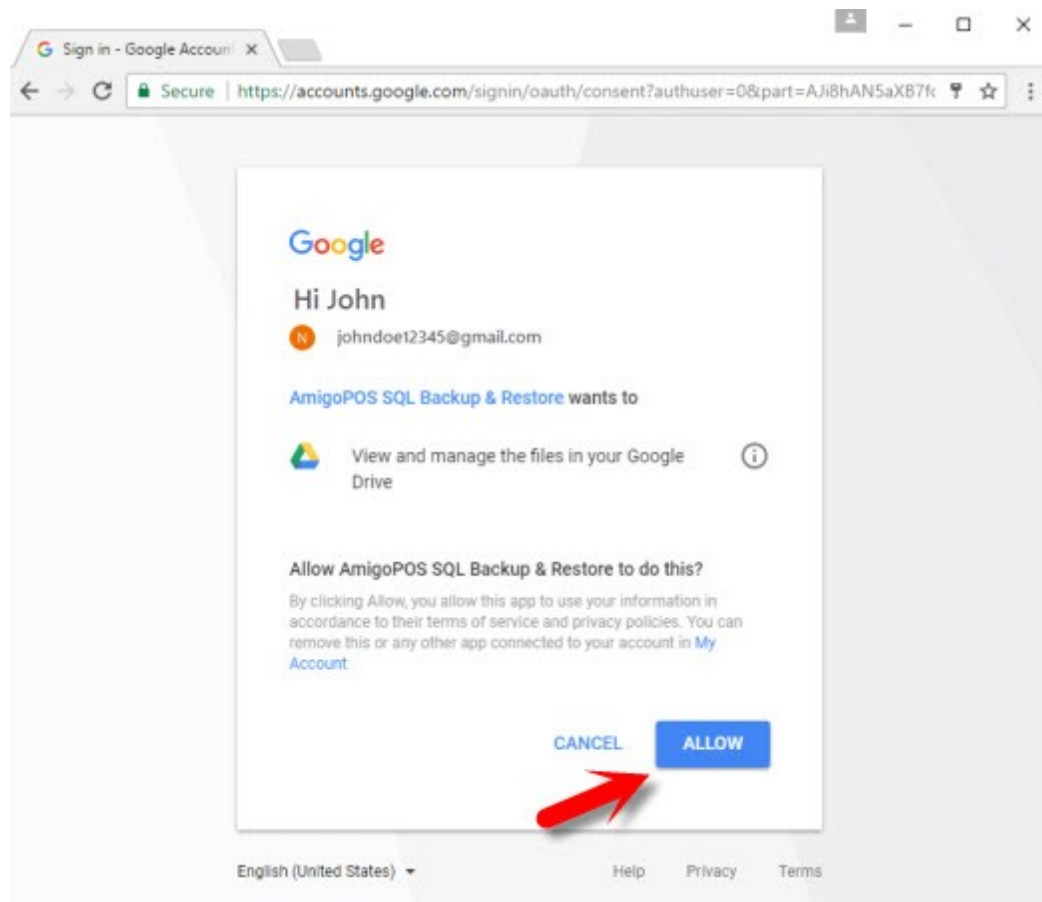
Click Backup Now to create a backup. A web browser will automatically launch prompting the user for the Google email or phone. Enter the email or phone and click **Next** to continue.



Enter the password and click **Next** to continue.



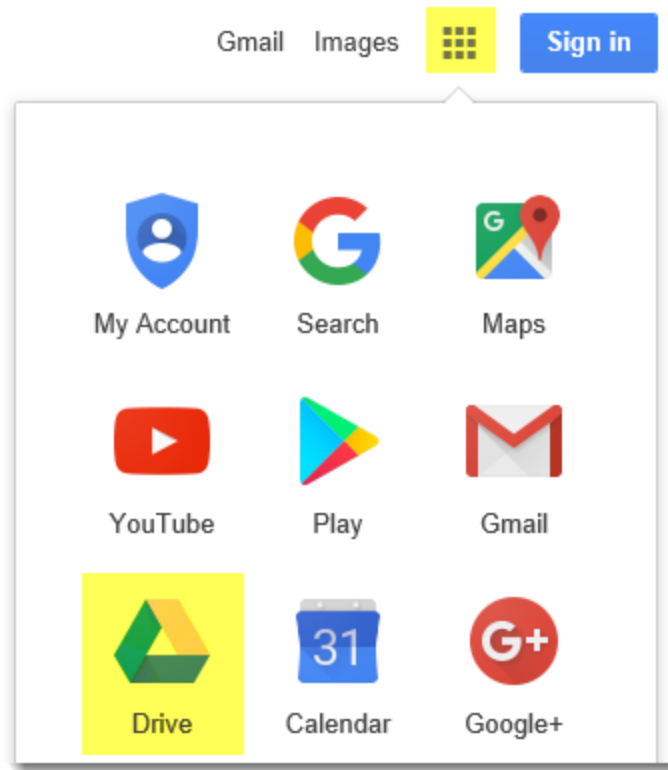
Verify that you are giving access to AmigoPOS SQL Backup & Restore by clicking **Allow**.



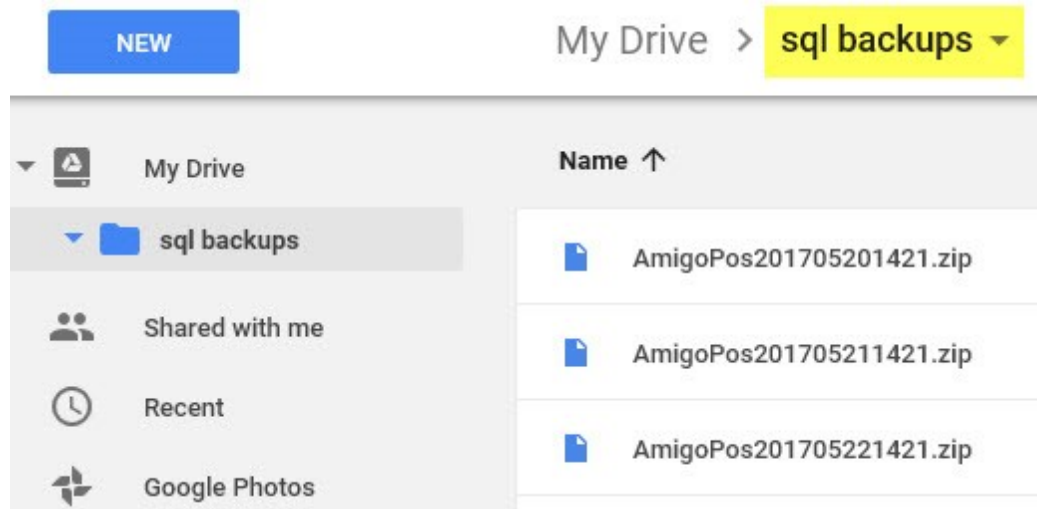
Set is complete and a backup will be automatically uploaded to Google Drive.



Login to Google and click the Google Drive icon.



Create a backup and verify that it appears in the **My Drive | sql backups** folder.



13.3 SQL Backup Master

SQL Backup Master is a lightweight database backup application that will automatically backup the pos database on a schedule using the Windows Task Schedule. The free edition allows backing up to the local file system including USB flash drives or external hard drives, [dropbox](#) or [box](#). The [paid editions](#) include Google Drive, Google Drive, Microsoft OneDrive, Secure FTP, Amazon S3 and other backup destinations.

Installation and Setup

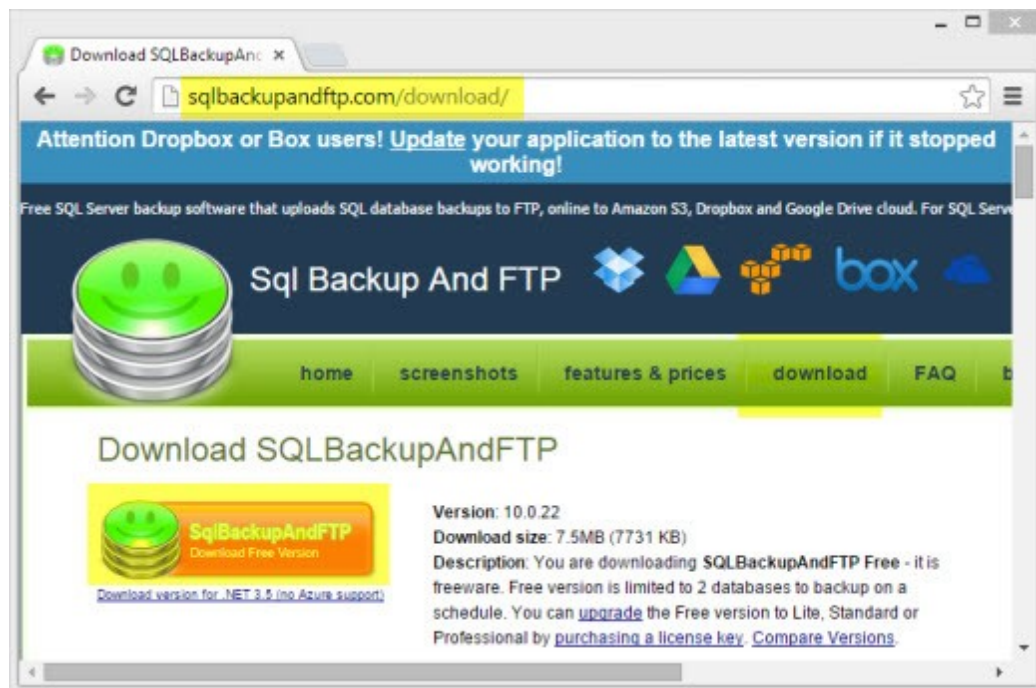
SQL Backup Master on the main pos station where the data service application is running. Complete the following steps to install and configure SQL Backup Master:

1. Select a backup destination: An external drive, shared drive on a different computer or a USB flash drive is preferred. A directory on the local file system can also be used.
2. Download and Install SQL Backup Master: <https://www.sqlbackupmaster.com/download>
3. Create a new backup job: Specify the database server and database, the backup destination and the schedule. After the job is created, click the backup button to verify that the database is backed up to the correct destination.

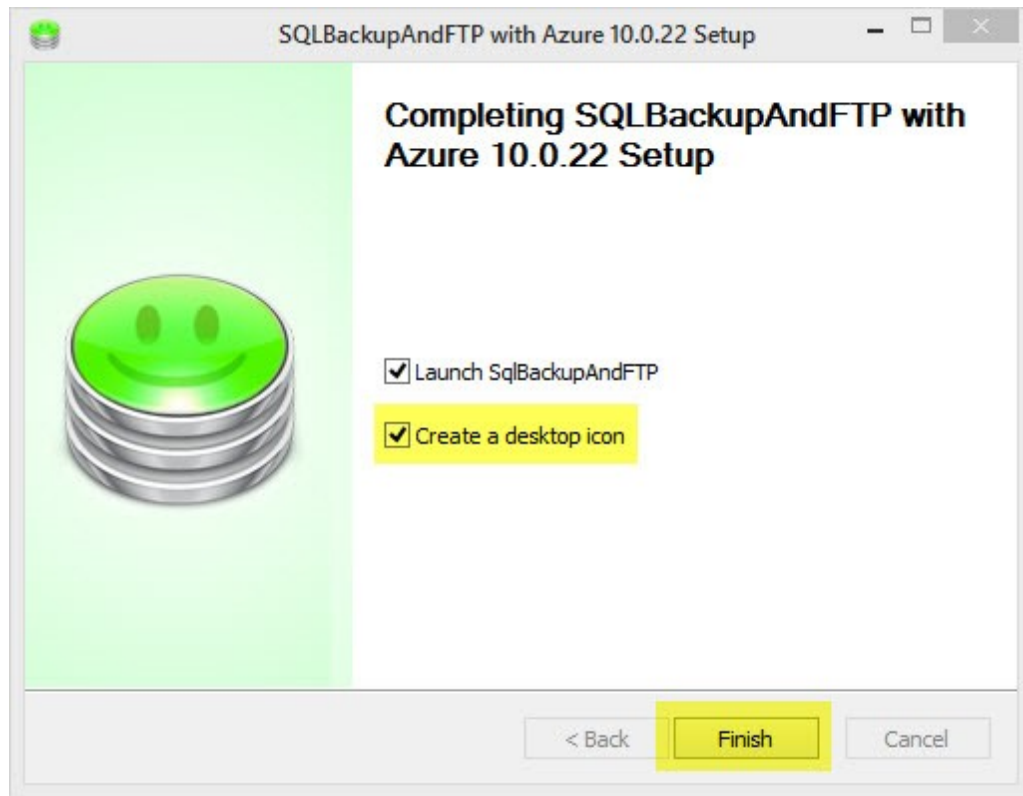
Refer to the following video for SQL Backup Master installation on Windows 10 with a local backup destination directory.

13.4 SQL Backup and FTP

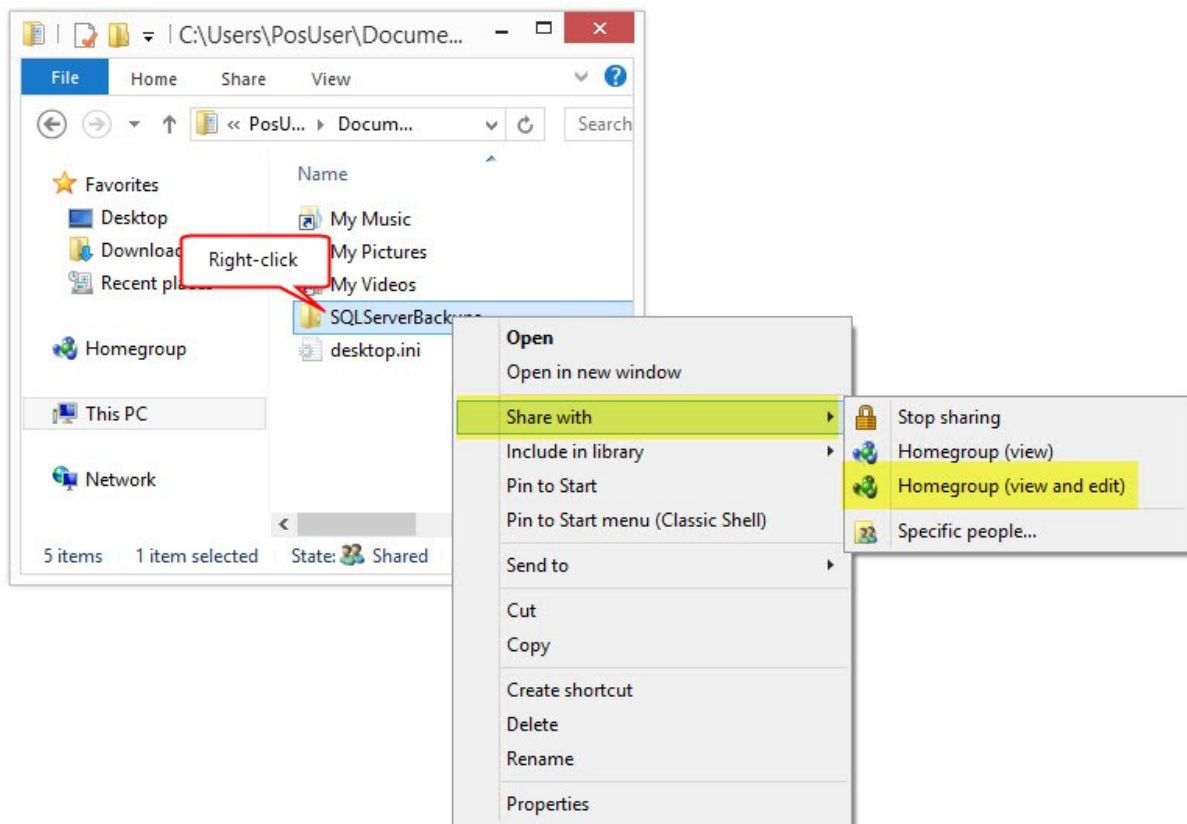
A freeware application is available to automatically backup and restore your SQL Server Express database in the event of failure. Download and install SQL Backup and FTP on the pos station running SQL Server from <http://sqlbackupandftp.com> using the default installer settings.



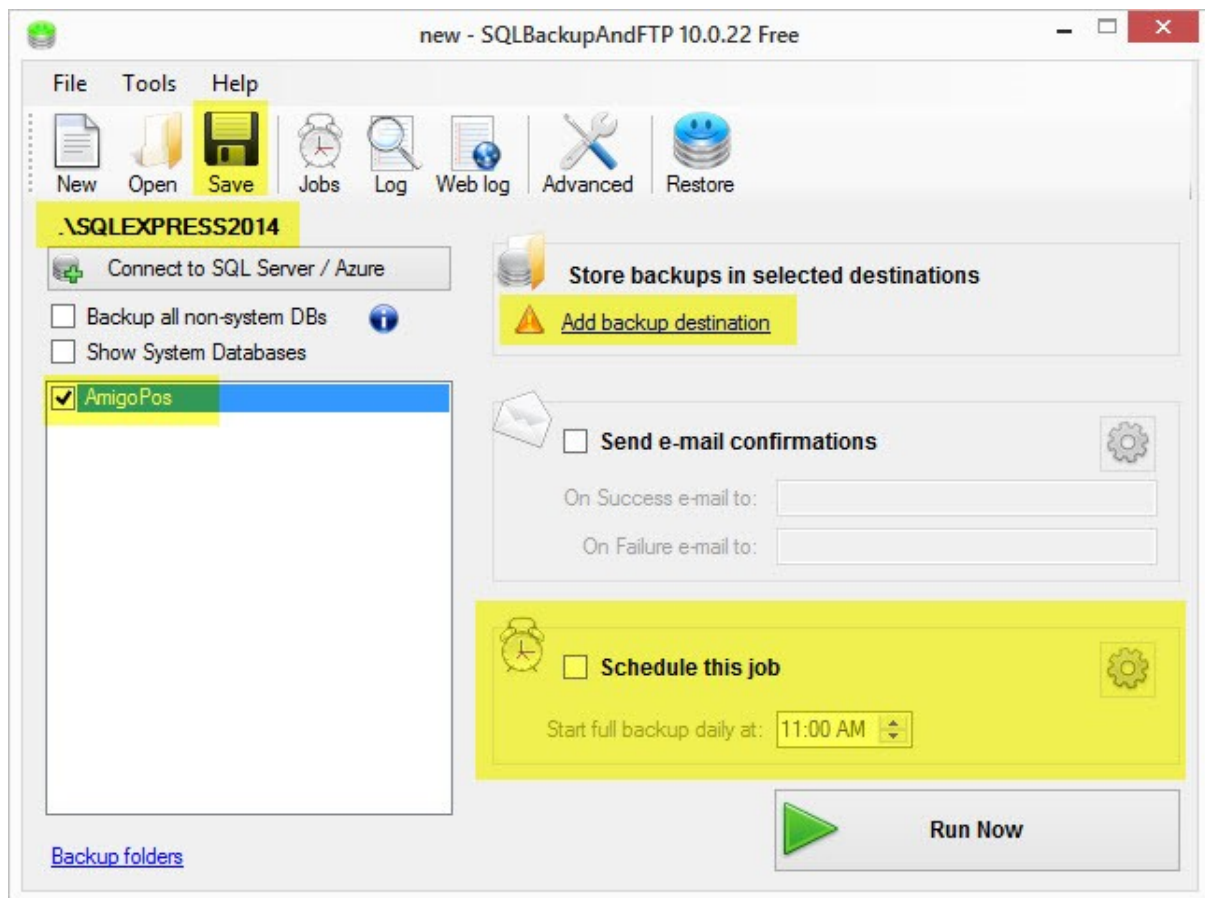
Download and run the SQLBackupAndFTP installer on the main pos station (where the SQL Server Express is installed). Proceed with the default settings. On the final screen check the box to create a desktop icon for easy access.



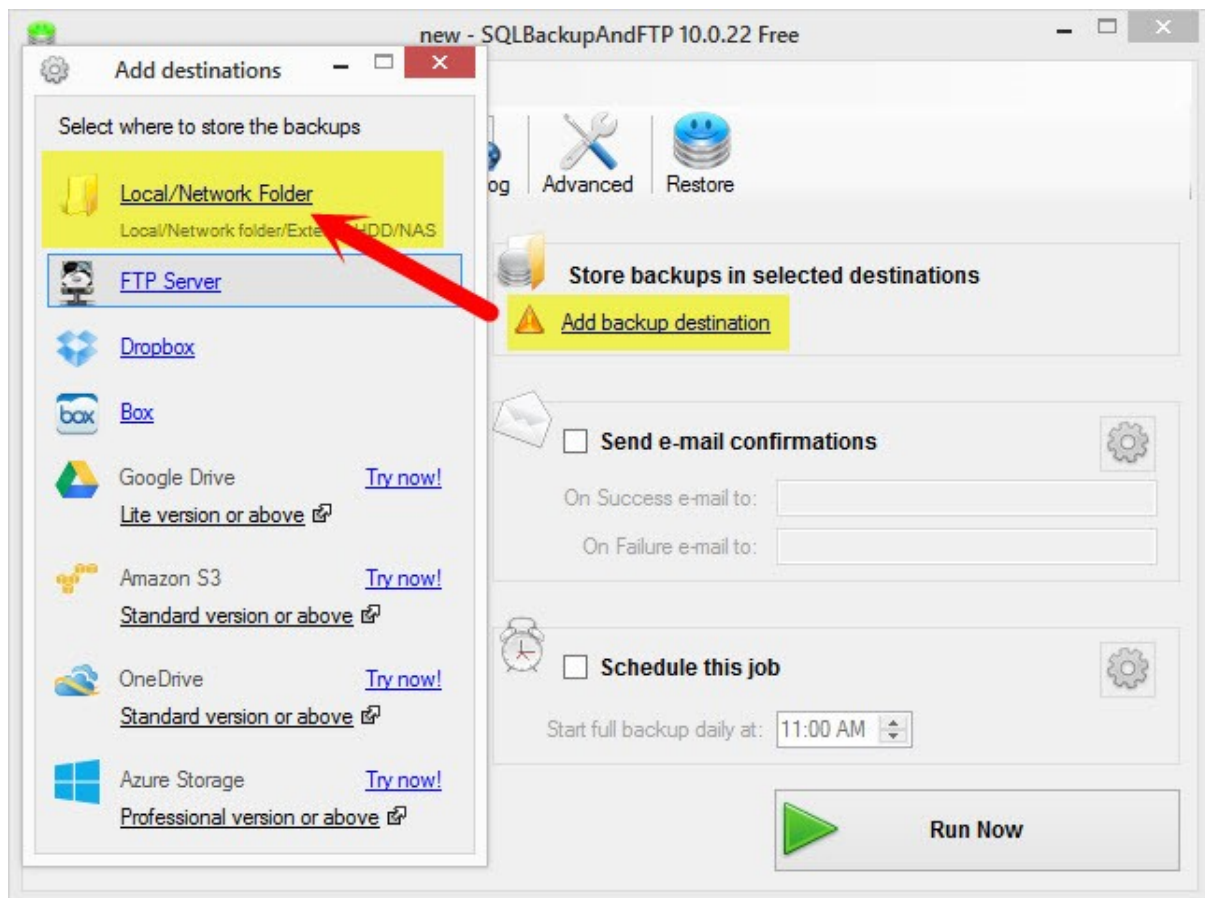
Create a backup destination on a different computer. In this example a backup folder named SQLServerBackups is created at STATION2. The folder is in the user/documents folder and can be shared with other Homegroup users by right-clicking on the folder and selecting Share with | Homegroup (view and edit). 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.



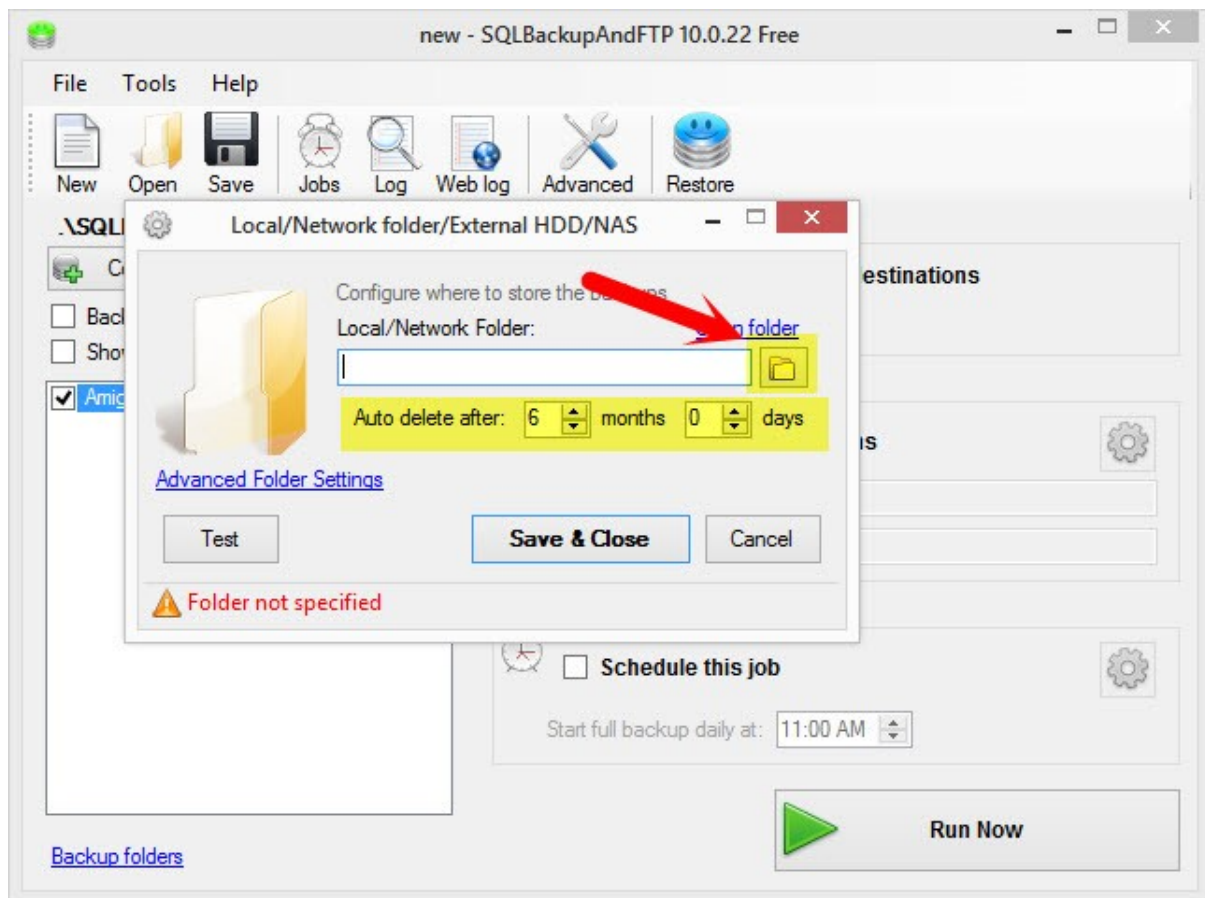
Run SQLBackupAndFTP from the desktop shortcut on STATION1 and verify that the SQL Server Express instance is displayed with the AmigoPOS database. If the correct SQL Server Express instance is not shown, click the Connect to SQL Server/Azure button to browse for the server instance that contains the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



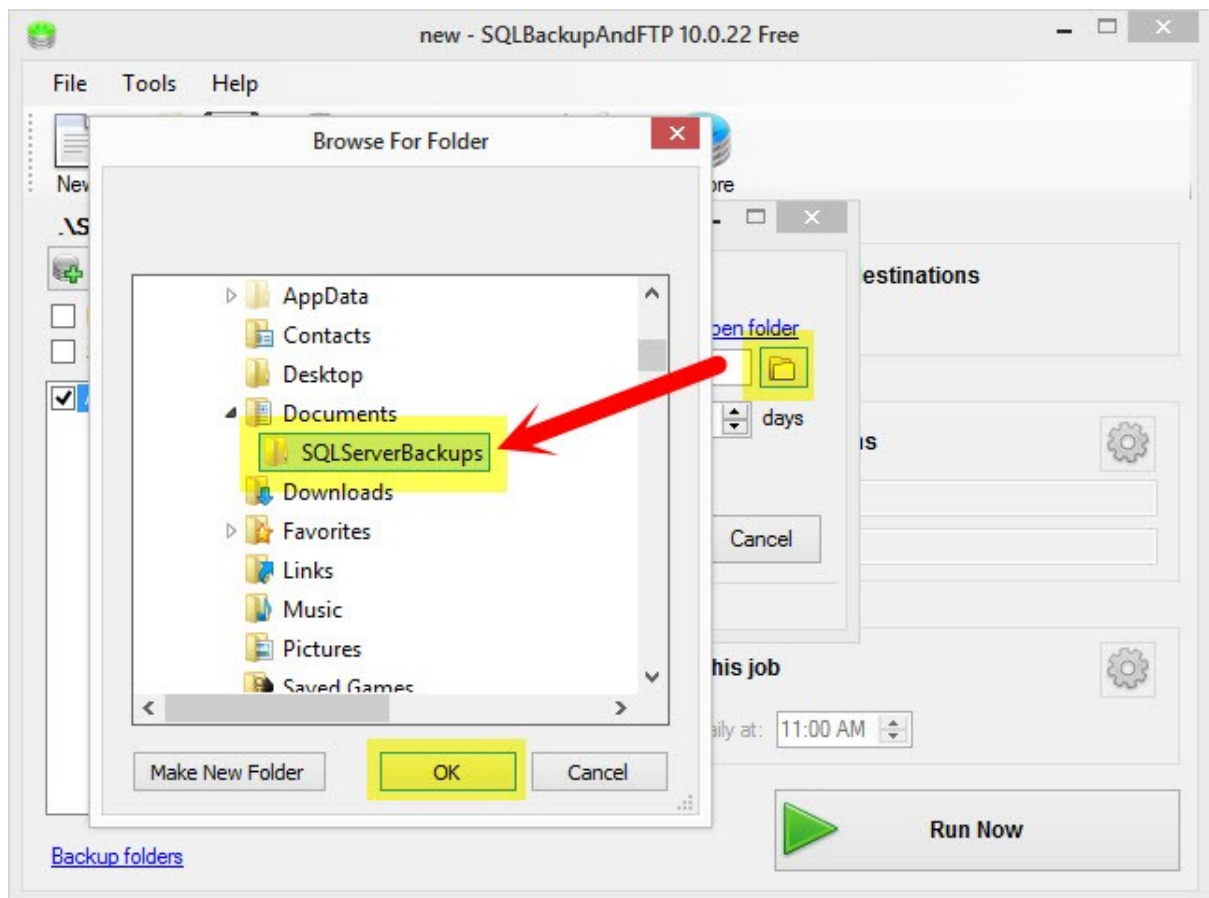
In the backup destinations windows, click Local/Network Folder to browse for the folder that is shared on STATION2.



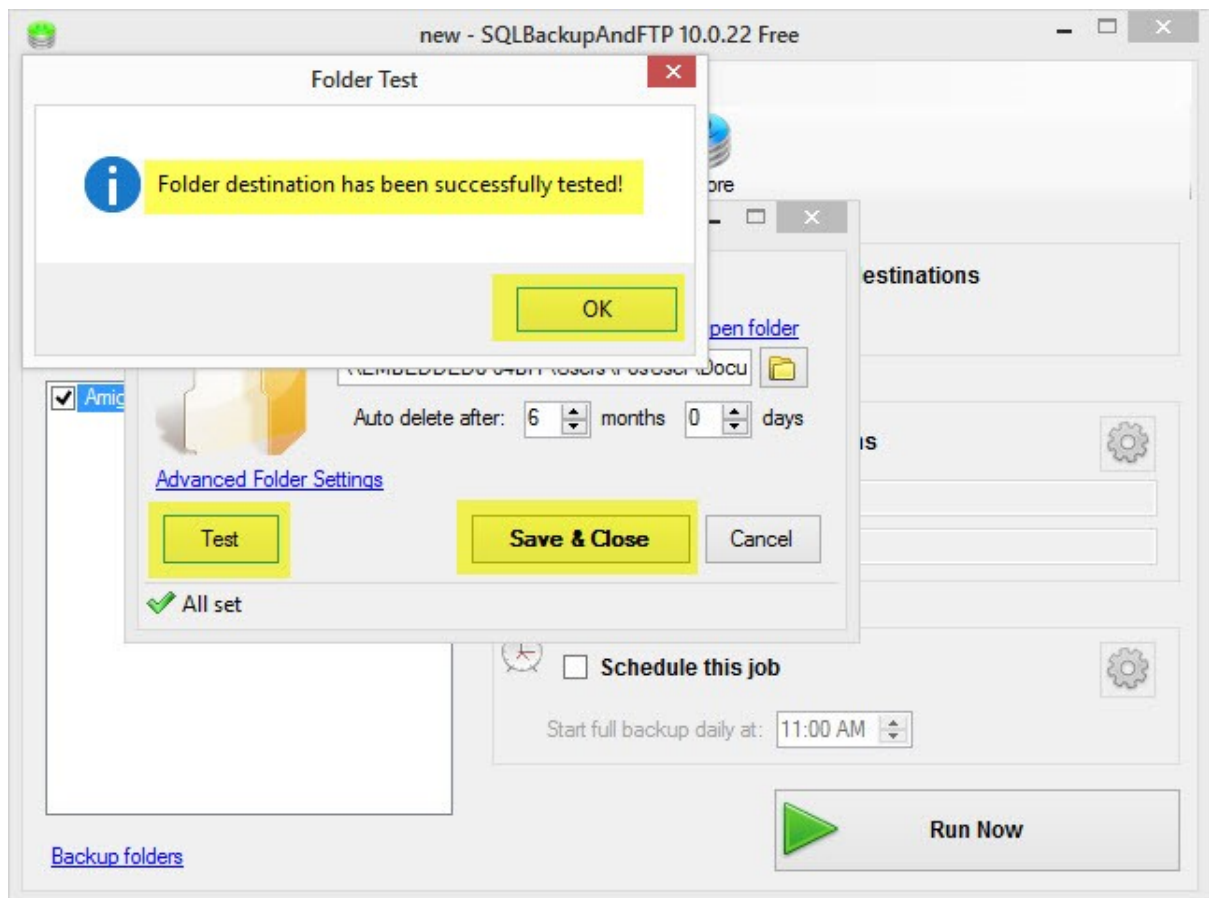
Click the folder icon to browse for the shared folder. Note that the backups can be auto-deleted after a predefined interval to save disk space.



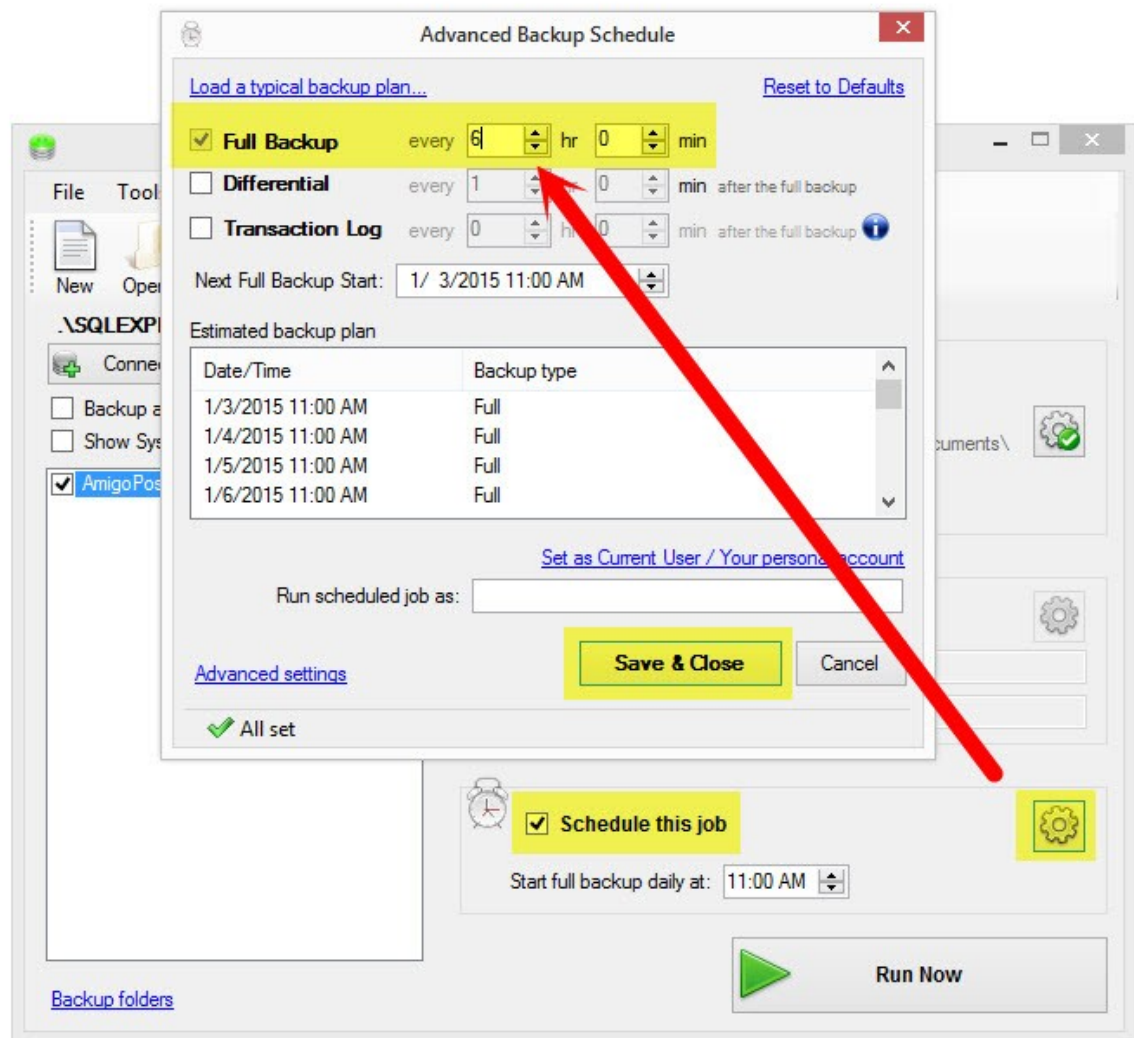
Expand the directories and locate the shared folder on STATION2. Select the folder and click OK.



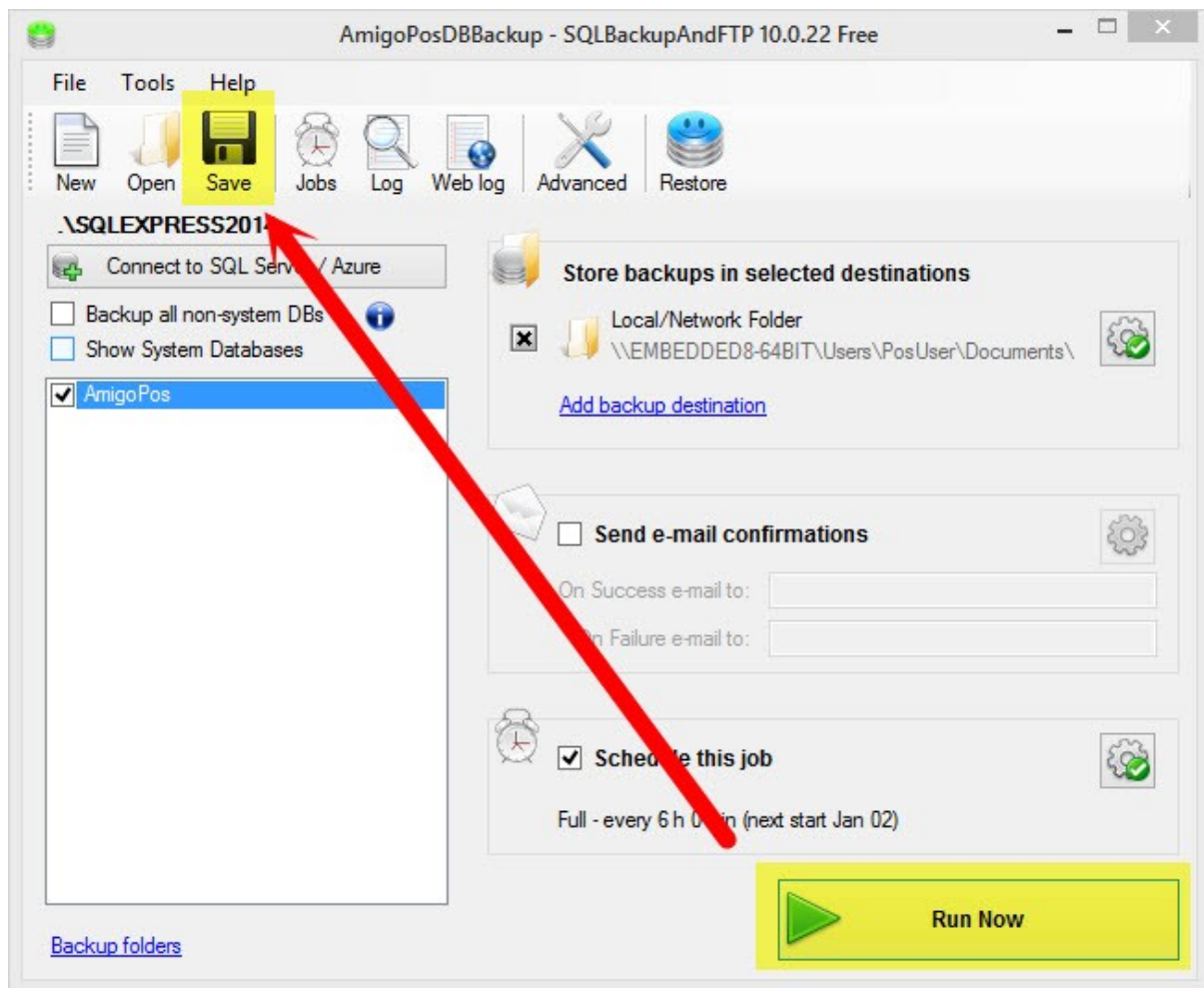
Click the Test button to verify that STATION1 has sufficient permissions to write to the backup folder on STATION2. Click OK followed by Save & Close to return to the main screen.



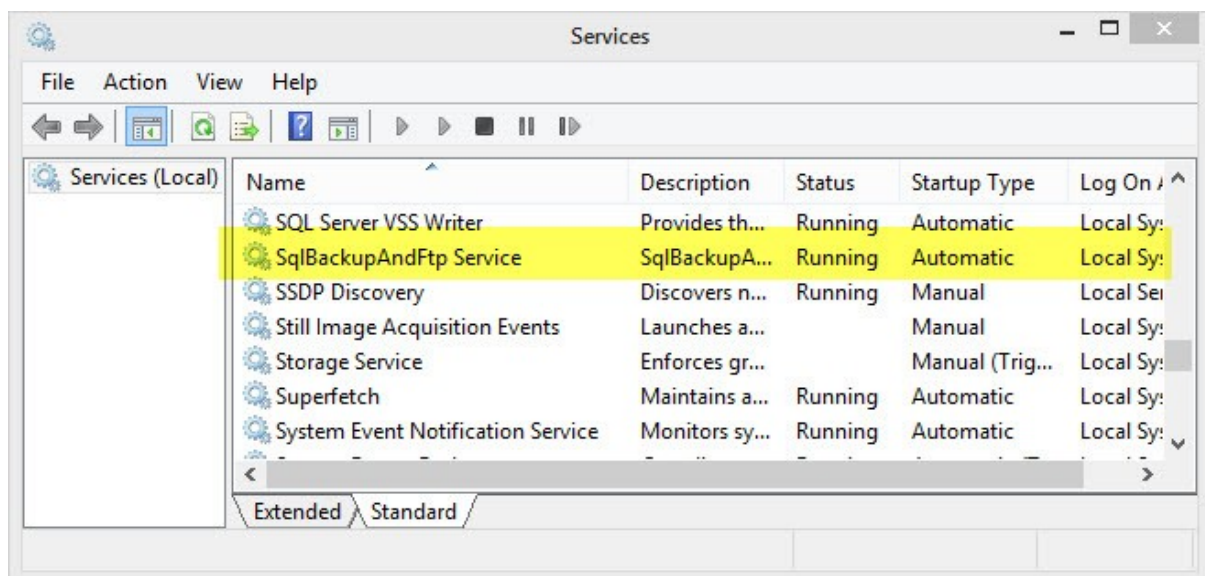
Check the box next to Schedule this job and select the backup interval. The example below is set to backup the database every 6 hours. Click Save & Close.



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



13.5 Database Restore

*Note that the AmigoPOS technical support staff can connect remotely to your main pos station to restore the database backup. First install [dbForge Studio Express Edition](#), copy the database backup file to the Windows desktop so that the technician can easily locate the file and then submit a [support ticket](#) with the preferred date/time for the database restore to be completed. Check your email for a reply containing a remote connection link and access code.

Although the integrated AmigoPOS database backup utility, SQL Backup Master and SQL Backup and FTP provide methods to restore a database from a backup file, the most reliable method is to manually restore the database backup using SQL Server Management Studio or dbForge Studio for SQL Server Express Edition.

The following topic describes restoring a database backup file using dbForge Studio Express Edition, available to download at no cost at <https://www.devart.com/dbforge/sql/studio/download.html>. SQL Server Management Studio are very similar, except that the installer file size is much smaller and installation is faster when using dbForge Studio.

1. Install dbForge Studio from the link above on the computer where the database will be restored. AmigoPOS should already be installed at the same computer, either with an existing database that will be replaced or a demo database.
2. If the database backup file is located on a different computer, copy the file to a USB flash drive and connect the drive to a USB port on the computer where the database will be restored.
3. Unzip the database backup file to the data directory. The default data directory for an SQL Server instance can be found in C:\Program Files\Microsoft SQL Server\MSSQL11.SQLEXPRESS2012\MSSQL\Backup, where MSSQL11.SQLEXPRESS2012 is the instance name. Note the unzipped file must end with the .bak extension, for example MyDbBackup-02022021.bak. If the file has no extension, right-click on the backup file and rename it to include the .bak extension.
4. Shut down the AmigoPOS data service application.
5. Run dbForge Studio and connect to the database server instance using Windows Authentication.
6. Right-click on the current database and click Delete. Check the box next to Close existing connections and click OK to delete. Note that this action cannot be reversed. Right-click on the server instance and select Tasks > Restore....
7. Under Source for restore, click Files and select the backup file.
8. Under Destination to restore, next to Database: replace the word master with a unique database name. This name is usually the same database name as the name that appears next to Database: under Source for restore, or can be the same name as the deleted database. Do not add an extension to the database name.
9. Click Restore at the bottom and the database should be restored in less than a minute. Allow more time for large databases. If the database restore fails, review the error message, correct the errors and try again.

10. Open the AmigoPOS data service application, click the host settings tab and verify that the database name is correct or enter the new database name and click Save and Test.

Refer to the following video for an example of database restoration on Windows 10 from a 1.4 GB backup file that follows the steps described above.

Deliveries

14 Deliveries

14.1 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 - Submit 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 | Order Types. Additional settings are available by editing the deliveries settings described in the next topic. Review the [Order Types](#) ⁷²⁰ help topic for additional information.

Open the order type configuration screen in Back Office | Settings | Main Settings | Order Types 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.

Order Type Settings	
BAR	
COUNTER	
DELIVERY	
DINE-IN	
DRIVE-THRU	
PICK-UP	
RETAIL	

Order Type Settings	
Print Labels	<input checked="" type="checkbox"/>
Order Entry	
Enforce Beverage Selection	<input type="checkbox"/>
Use Exact Change For Cash	<input type="checkbox"/>
Stay On Order Entry Screen	<input type="checkbox"/>
Show Seating Chart	<input type="checkbox"/>
Guest Assignment Enabled	<input type="checkbox"/>
Enter Number Of Guests	<input type="checkbox"/>
Show Customer Info	<input checked="" type="checkbox"/>
Show Delivery Zones	<input checked="" type="checkbox"/>
Show Phone Number	<input checked="" type="checkbox"/>
Show Customer Name Prompt	<input type="checkbox"/>

Order Type Name
The order type name appears on the main screen button, order entry screen, customer receipt, prep ticket and remote display

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).

Delivery/Customer Info Settings

Delivery Settings Phone Number Format Delivery Zones Mapping

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

Phone Number Format Length
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.

Customer Information Screen Settings

Customer Information Screen Phone Number Format Delivery Zones

Numbers Only	<input type="checkbox"/>
Digits Total	7
Digits Group 1	3
Digits Group 2	4
Digits Group 3	1

Numbers Only

Check the box to disable the automatic insertion of dashes into phone number

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 in **Back Office | Settings | Main Settings | Deliveries**. ***At least one (enabled) delivery zone is required, even if the zone charge is set to zero.** New delivery zones are added in **Back Office | Settings | Main Settings | Deliveries | Delivery Zones** by entering the name, description and charge on the top line and pressing the Enter on the keyboard.

Customer Information Screen Settings

Customer Information Screen Phone Number Format Delivery Zones

	NAME	DESCRIPTION	BUTTON POSITION	CHARGE	FREE LIMIT	
+	Click here to add a new row					
	North End	North	1	\$2.20	\$25.00	NC
	Web Order	Default Web Order Delivery Zone	1	\$2.50	\$0.00	NC
	Free Web Orde	Default Free Web Order Delivery Zone	1	\$0.00	\$0.00	NC
	Downtown	Downtown	2	\$2.75	\$0.00	NC
	West Side	West	3	\$1.00	\$0.00	NC
	No Charge	Free	4	\$0.00	\$0.00	NC

If caller id is enabled, a list of the 25 most recent calls appears on the right side of the screen. Select a caller id entry under Recent Calls to look up the phone number.



If the customer has ordered previously with the phone number, the previously customer information will appear. Verify that the information is correct and press **CONTINUE** to start the order. For customers that order the same items regularly, press the **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.

An alternate customer location can be added for customers with 2 addresses. Toggle the user primary address | use alternate address switch to select the address for the new order.

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.



14.2 Driver Management

The deliveries screen is used to assign orders to drivers and is accessed under the Transactions 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.

User Interface Settings				
Transaction Buttons				
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"/>
TABLE MANAGEMENT	TABLE MANAGEMENT	8		<input type="checkbox"/>
CALL CENTER MESSAGE	CALL CENTER MESSAGE	9		<input checked="" type="checkbox"/>

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](#) ²⁸⁰
- [Check Out/In](#) ²⁸²
- [Driver Deposits](#) ²⁸⁴
- [Force Deposits](#) ²⁸⁴
- [End Shift](#)

Configuration

Various options are available to customize the behavior of the Deliveries screen. Navigate to Back Office | Settings | Main Settings | Deliveries to edit the settings.

Category	Setting	Value
Deliveries Screen	ClockedInDriversOnly	<input type="checkbox"/>
	Order Drivers By Last Time Out	<input checked="" type="checkbox"/>
Alerts	Enabled	<input type="checkbox"/>
	Late Minutes	30
Delivery Check Out	Print Trip Ticket	<input checked="" type="checkbox"/>
	Reprint Customer Receipts	<input checked="" type="checkbox"/>
	Print Directions	<input checked="" type="checkbox"/>
	Transfer Order To Driver	<input checked="" type="checkbox"/>
Delivery Check In	Settle Button	<input checked="" type="checkbox"/>
	Settle Cash Button	<input checked="" type="checkbox"/>
Email	Delivery Out Message	The driver is in route with your order
	Delivery Out Subject	Order Update
	Delivery Sent Out Email Message Body	Delivery Sent Out
	Delivery Sent Out Email Message Subject	Delivery Sent Out
	Order Settled Email Message Body	Order Settled
	Order Settled Email Message Subject	Order Settled
End Shift	Driver ClockOut	<input checked="" type="checkbox"/>
	Print Driver Report	<input checked="" type="checkbox"/>

ClockedInDriversOnly
Check the box to show only drivers that are clocked-in on the delivery screen

The following settings are available:

Drivers

- **Clocked In Drivers Only:** Check the box to show only drivers that are clocked-in on the delivery screen
- **Order Drivers By Last Time Out:** Check the box to display the drivers in descending order based on the time of the last delivery

Late Order Alerts

- **Enabled:** Show alerts for late delivery orders
- **Late Minutes:** Select the value in minutes that indicates a delivery order is late

Delivery Check Out

- **Print Trip Ticket:** Check the box to print the trip ticket when the delivery is sent out
- **Reprint Customer Receipts:** Check the box to print a customer receipt for each order when the delivery is sent out
- **Print Directions:** Print turn-by-turn directions under each trip ticket order summary
- **Transfer Order To Driver:** Check the box to transfer the order to the driver when the trip ticket is saved. This is useful for employee banking so that the original user's liability report does not contain the order.

Delivery Check In

- **Settle Button:** Check the box to display the Settle button on the delivery check-in screen
- **Settle Cash Button:** Check the box to display the Settle Cash button on the delivery check-in screen

Email

- **Delivery Out Message:** Enter the message body to use when sending a delivery sent out notification
- **Send Email When Delivery Sent Out:** Specify whether To automatically send an order confirmation when an order is sent out For delivery.
- **Delivery Out Subject:** Enter the subject line to use when sending a delivery sent out notification
- **Delivery Sent Out Email Message Body:** Enter the message to send for the Email and/or SMS.
- **Delivery Sent Out Email Message Subject:** Enter the Email message subject.
- **Order Settled Email Message Body:** Enter the message to send for the Email and/or SMS.
- **Order Settled Email Message Subject:** Enter the Email message subject.

End Shift

- **Driver Clock Out:** Check the box to automatically clock-out the driver when the end shift is run. Set to No if the driver is required to enter cash gratuities at clock-out.
- **Print Driver Report:** Check the box to automatically print the driver liability report when the end shift is run

The settings related to [employee banking](#) ⁽²¹⁴⁾ are available in Back Office | Settings | Main Settings | Employee Banking.

Employee Banking Settings

Server Banking **Driver Banking**

Search

General Settings	
Enable Driver Banking	<input checked="" type="checkbox"/>
Driver Job Type	DRIVER
Delivery Charges	
Deduct Delivery Charges	<input checked="" type="checkbox"/>
Gratuities	
Deduct Delivery Charge Percentage	100.00
Deduct Non Cash Gratuities	<input checked="" type="checkbox"/>
Credit Card Tips Percentage	0.00
Cash Payout	
Delivery Charge Payout Reason	DRIVER DELIVERY
Gratuity Payout Reason	DRIVER TIPS
Payout Vendor	EMPLOYEE
Report	
Delivery Charges	<input checked="" type="checkbox"/>
Itemize Gratuities	<input checked="" type="checkbox"/>
Itemize Order Details	<input checked="" type="checkbox"/>
Itemize Transaction Details	<input checked="" type="checkbox"/>

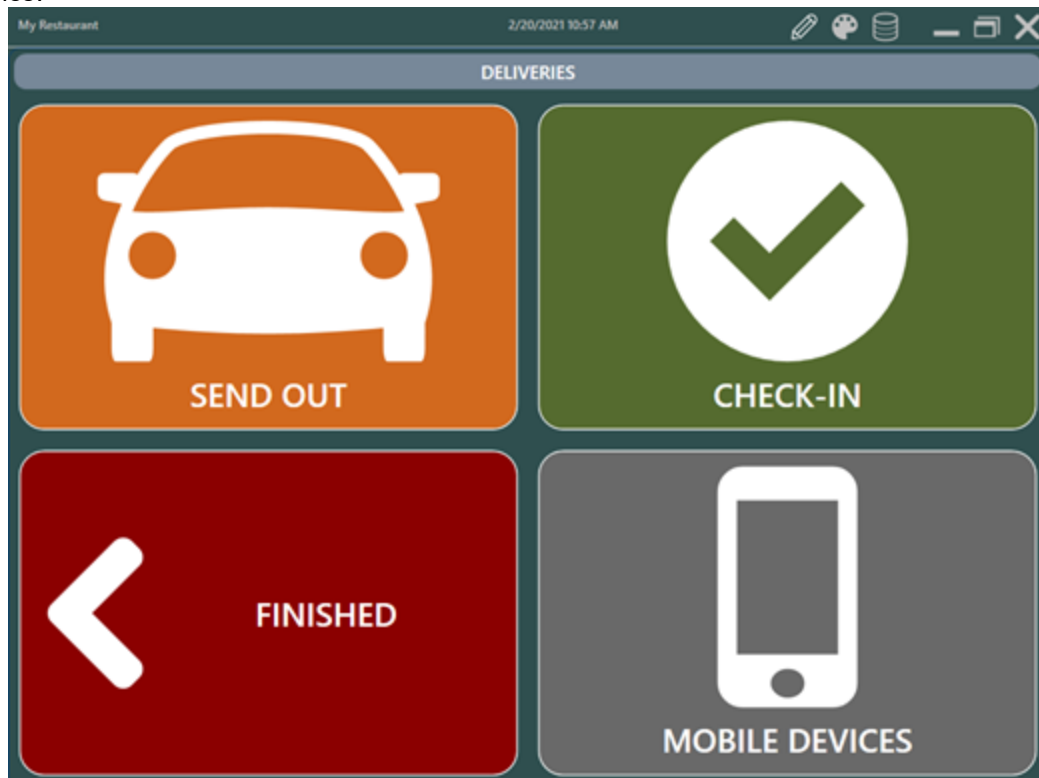
Enable Driver Banking
Check the box to use driver banking

Check Out/In

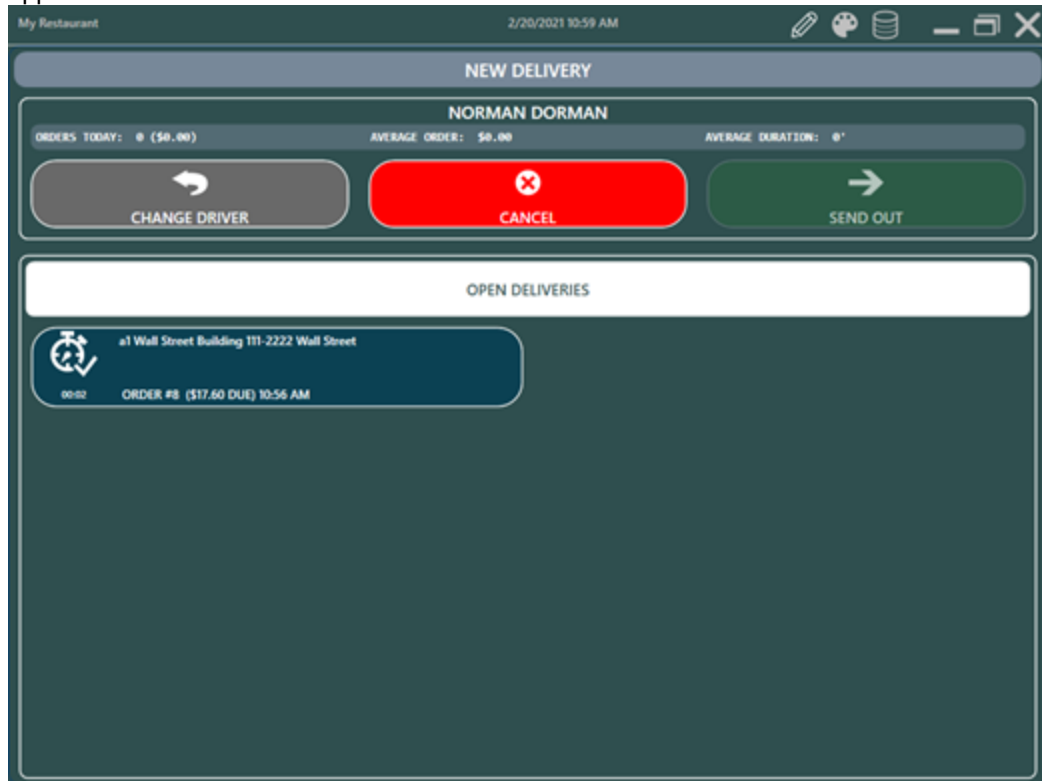
Click the **Deliveries** button under the **TRANSACTIONS** button group to start a new trip ticket.



Select **SEND OUT** to view a list of available drivers or **CHECK IN** to settle or check in completed deliveries.



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.



Check-In

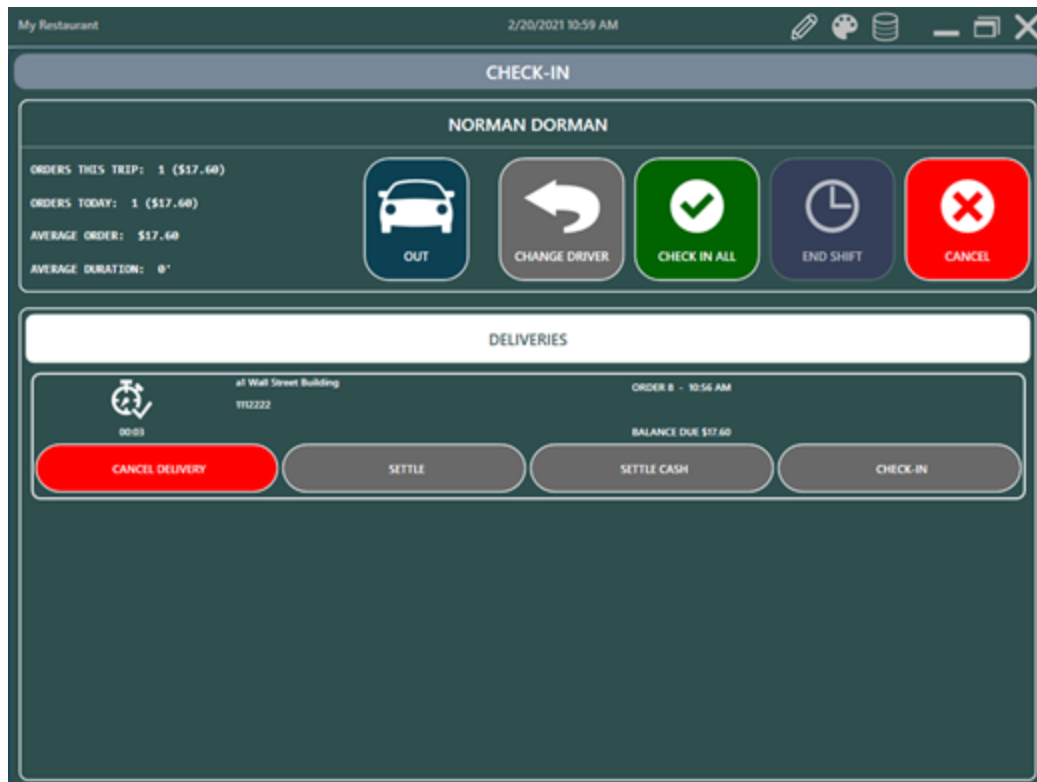
When a driver returns, the orders can be settled immediately or just checked-in to be settled later. Checked-in orders no longer appear on the order selection screen but are considered open since there is still a balance due. The **Check-In & Settle** button is used to settle each selected order's entire 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.



The **Settle** buttons are controlled by the **Allow Settle** [permission](#)⁴³³. 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 **Allow Settle** permission.

When using the **Settle Cash** 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 green **Check-In Only** button at the top 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**²⁸⁵ 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

My Restaurant 2/20/2021 11:03 AM

EMPLOYEE BANKING

END SHIFT

A CASH TRANSACTION WILL BE POSTED TO THIS POS STATION FOR THE BALANCE DUE ON EACH OPEN DELIVERY ASSIGNED TO THIS DRIVER, INCLUDING ORDERS THAT HAVE NOT BEEN CHECKED-IN. PRESS THE END SHIFT BUTTON TO OPEN THE DRAWER AND DEPOSIT THE AMOUNT SHOWN BELOW TO SETTLE THE ORDERS AND RESET THE LIABILITY FOR THIS DRIVER TO ZERO.

My Restaurant 600 Biscayne Blvd Miami, FL 33130 111-222-3333		EMPLOYEE	DORMAN NORMAN
-----		STATUS	OWES: \$15.40
DRIVER LIABILITIES		NON CASH TIPS	\$0.00
NORMAN DORMAN		MANDATORY TIPS	\$0.00
2/20/2021 11:02:56 AM			

DELIVERIES			
(1) ORDER 8	17.60		
DELIVERIES TOTAL (1): 17.60			

DELIVERY CHARGES COLLECTED			
(1) ORDER 8	2.20		
DEL CHG TOTAL (1): 2.20			

NORMAN D OWES: \$15.40			

PRINT

CANCEL **END SHIFT**

14.3 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](#)^[210] 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 customer 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 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

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 | Employee Banking | Driver Banking** and adjust the settings that contain the **Driver Report** prefix, as shown below.

Employee Banking Settings

Server Banking **Driver Banking**

Search

General Settings

Enable Driver Banking	<input checked="" type="checkbox"/>
Driver Job Type	DRIVER

Delivery Charges

Deduct Delivery Charges	<input checked="" type="checkbox"/>
-------------------------	-------------------------------------

Gratuities

Deduct Delivery Charge Percentage	100.00
Deduct Non Cash Gratuities	<input checked="" type="checkbox"/>
Credit Card Tips Percentage	0.00

Cash Payout

Delivery Charge Payout Reason	DRIVER DELIVERY
Gratuity Payout Reason	DRIVER TIPS
Payout Vendor	EMPLOYEE

Report

Delivery Charges	<input checked="" type="checkbox"/>
Itemize Gratuities	<input checked="" type="checkbox"/>
Itemize Order Details	<input checked="" type="checkbox"/>
Itemize Transaction Details	<input checked="" type="checkbox"/>

Enable Driver Banking
Check the box to use driver banking

Driver Liability Calculation

The total liability for each driver is determined for a given business day, regardless of cash drawer 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

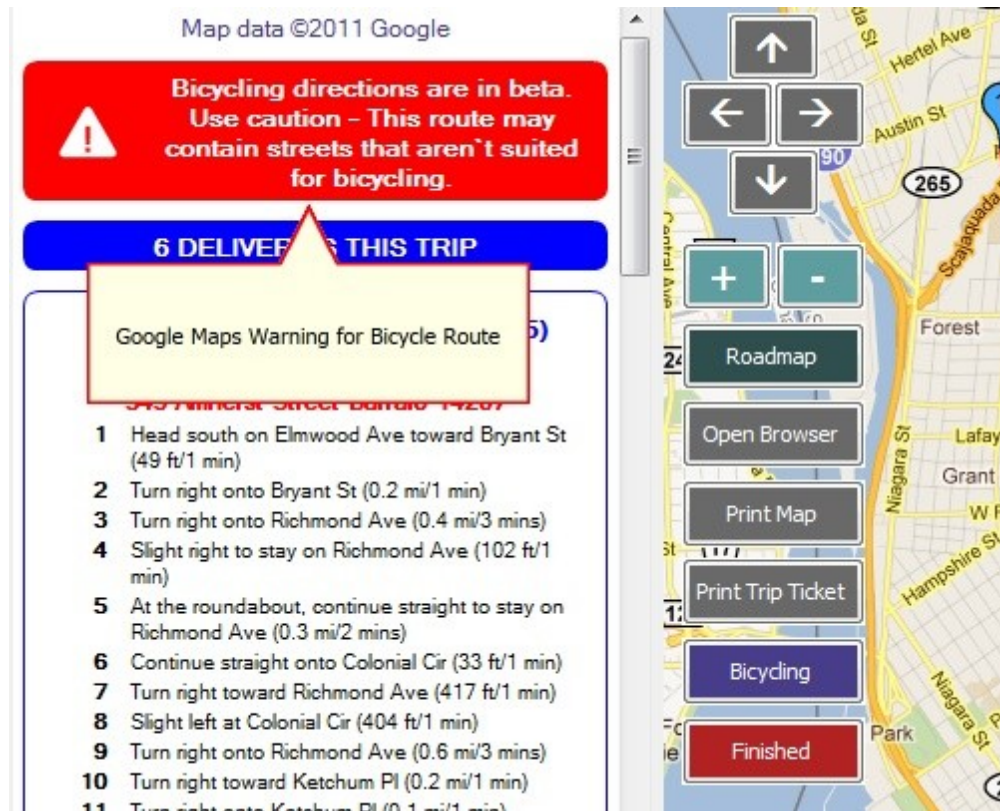
```

*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.

14.4 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.



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.



Settings

The map interface is enabled in **Back Office | Settings | Main Settings | Google Maps** by selecting Google Maps from the drop-down list. All settings are set independently at each station.

Google Maps Settings	
Interface	Google Maps ▼
Location Suffix	
Geocoding Api Key	API_KEY
Language	en
Start Address Coordinates	40.750556, -73.993611
Travel Mode	driving ▼
Units	metric
Distance Limit	7
Stop Estimate	5
Zoom Level	13 ▼
Interface 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

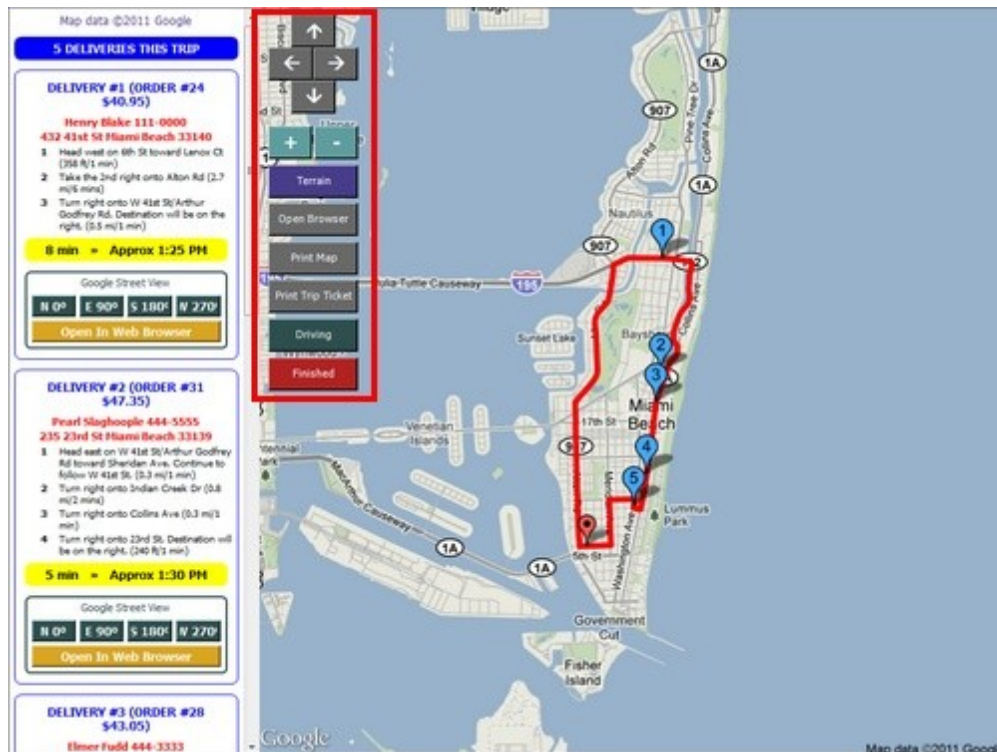
- **Delivery Destination Estimate:** AmigoPOS will estimate the trip time by adding the route time from Google Maps to the estimate of time spent at each customer location, generally 3-7 minutes.
- **Default Travel Mode:** Select the mode that the delivery person will use to make the deliveries so that 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**

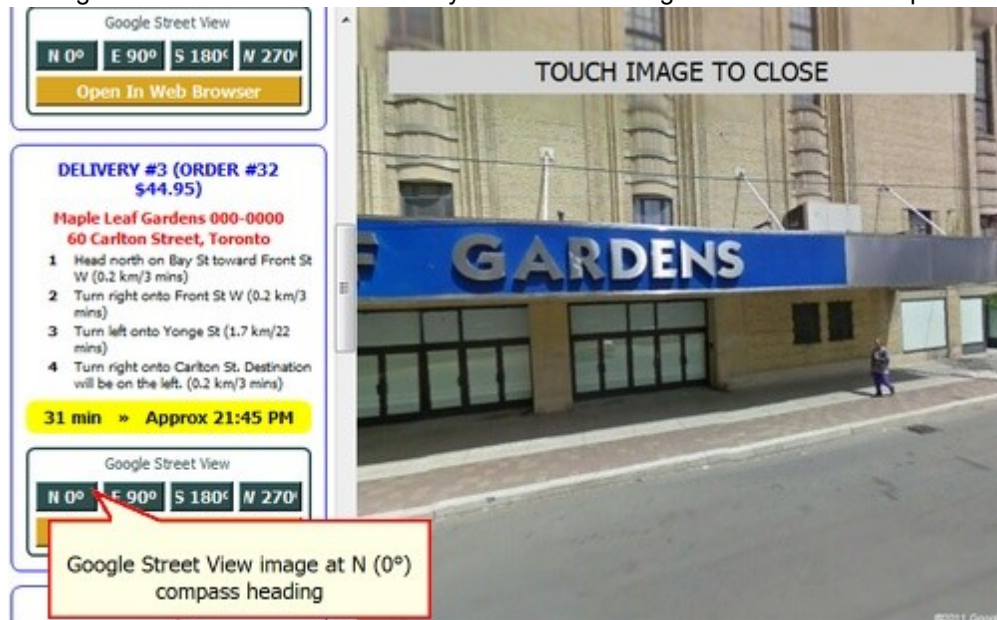


The map can be printed to a full size printer. The map will print in landscape mode to the **default printer** on the local workstation. The receipt printer should not be set as the default printer, as the paper is too narrow to print a map.

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.



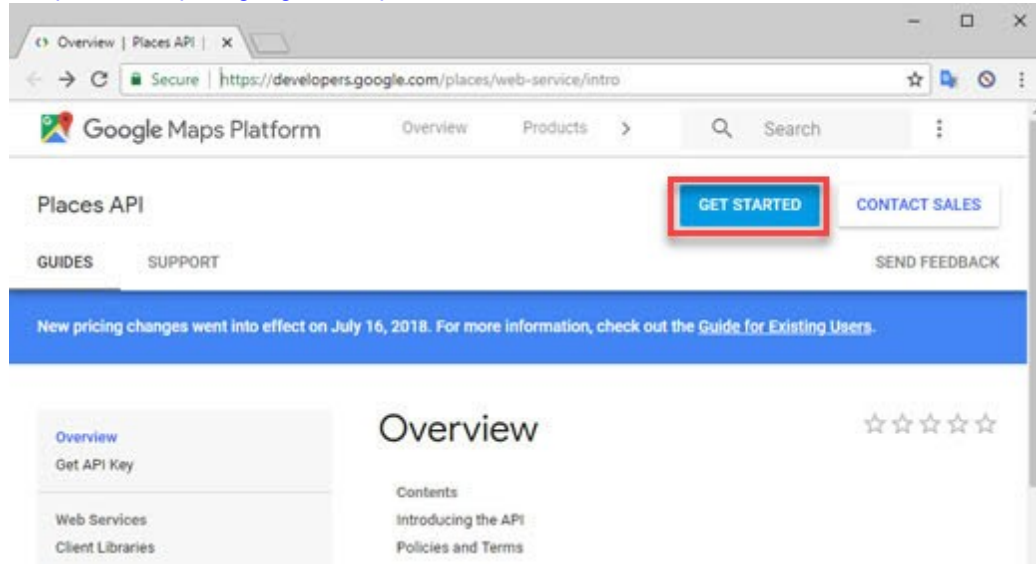
Errors

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.

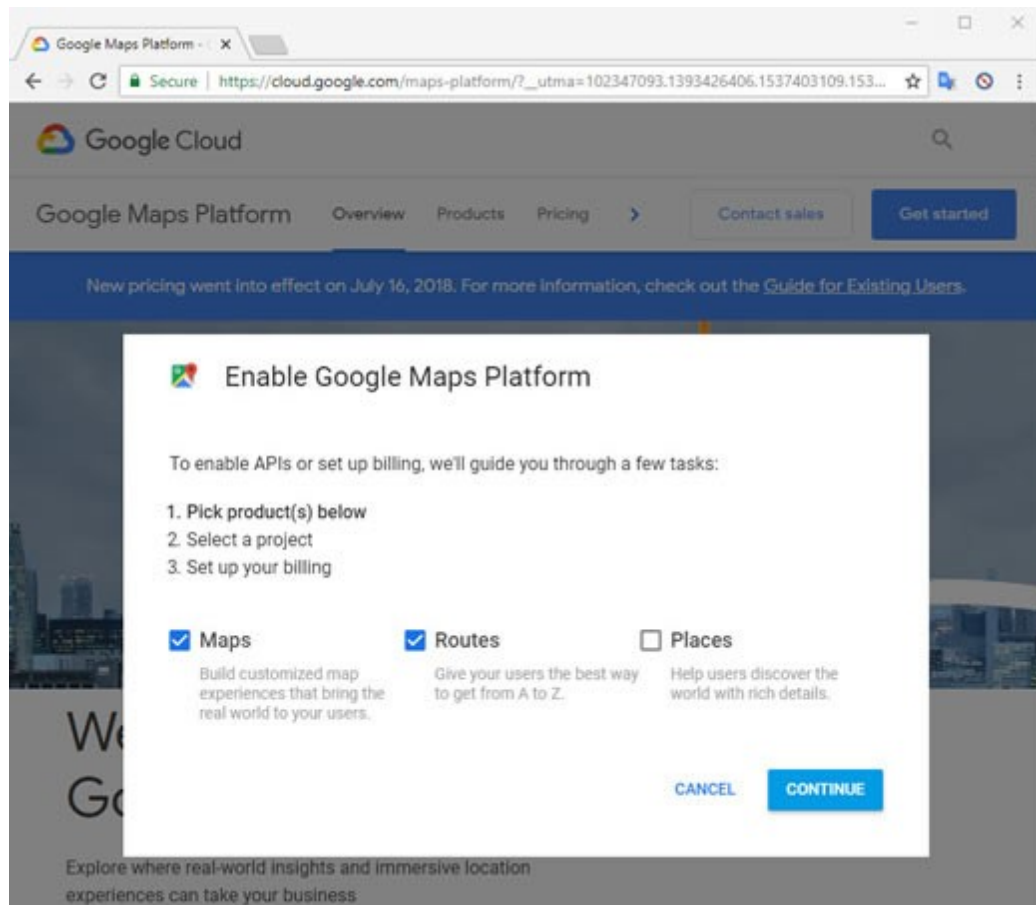
14.5 Google Places API Key

A Google Places api key is required to enable Google Maps on the driver routing screen and to calculate distance on the customer information screen. In most cases there is no monthly charge since the first \$200 of usage is free, as described at <https://cloud.google.com/maps-platform/pricing/>. Complete the steps below to obtain an Google Places api key.

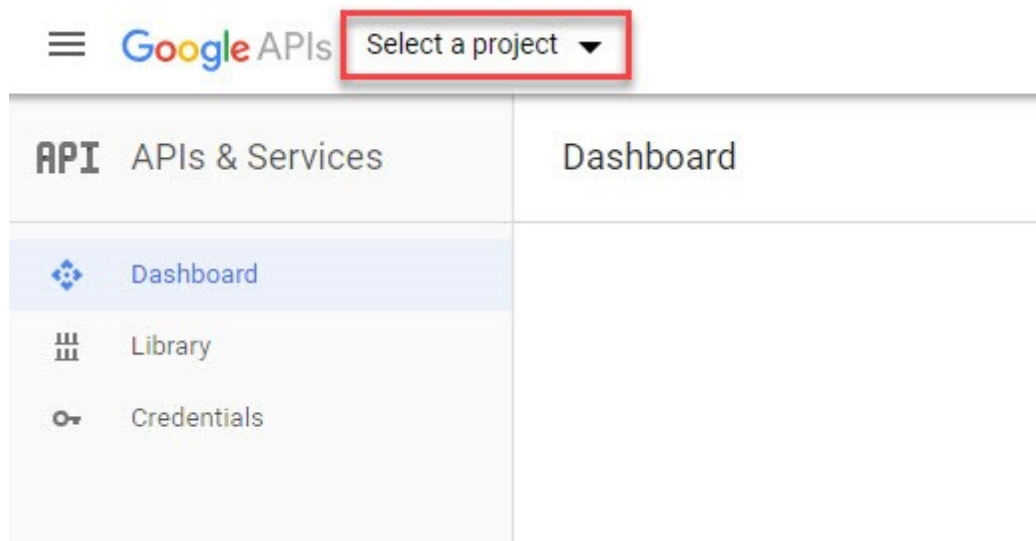
1. Open <https://developers.google.com/places/web-service/intro> and click **GET STARTED**.



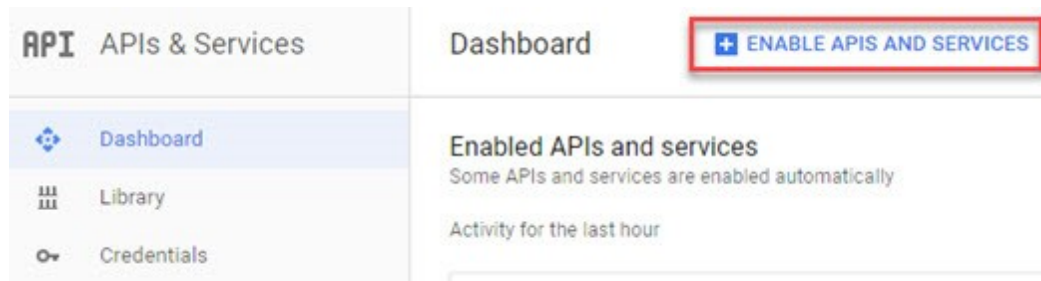
2. Complete the steps to create a new project and obtain an api key.



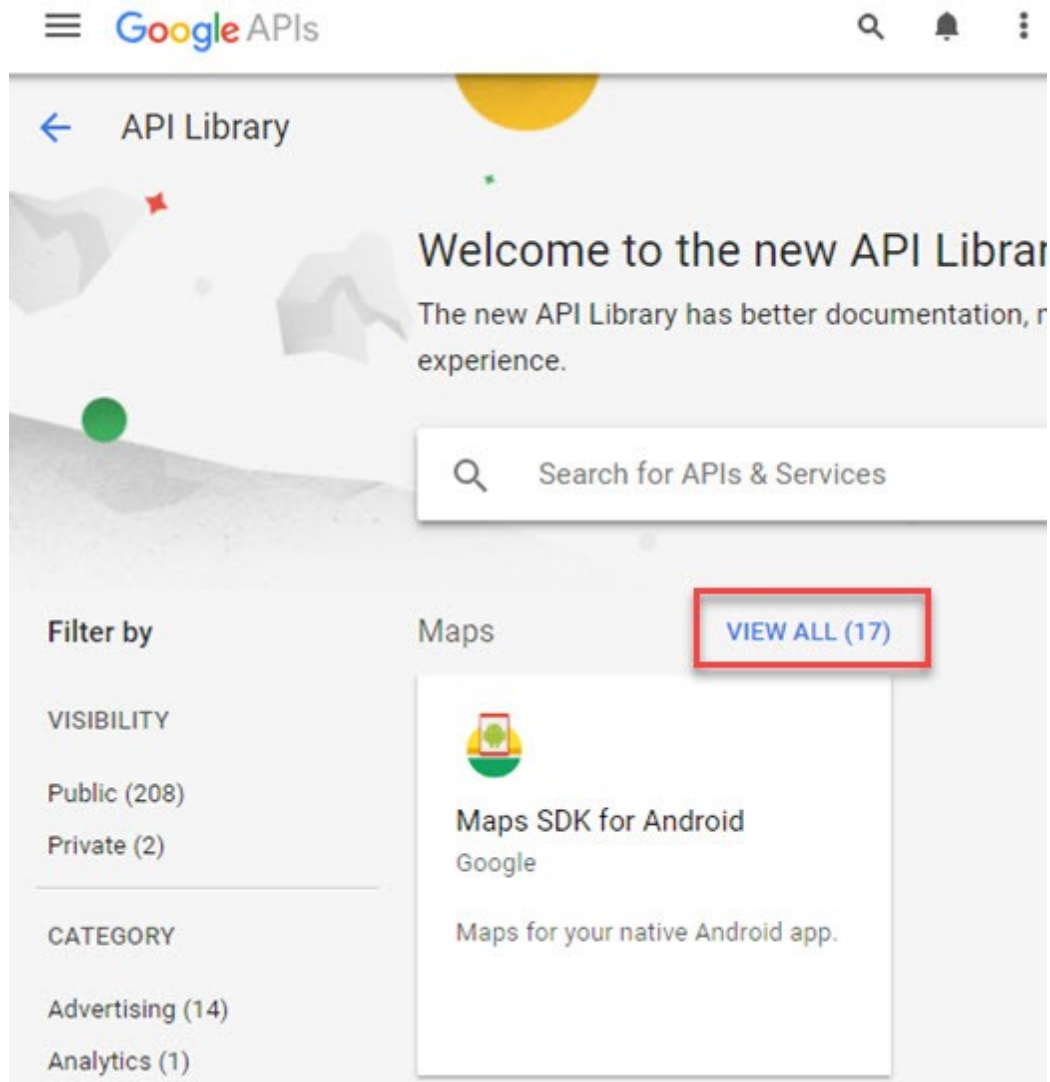
3. Open <https://console.developers.google.com/apis/dashboard> and select the project that was created in step 2.



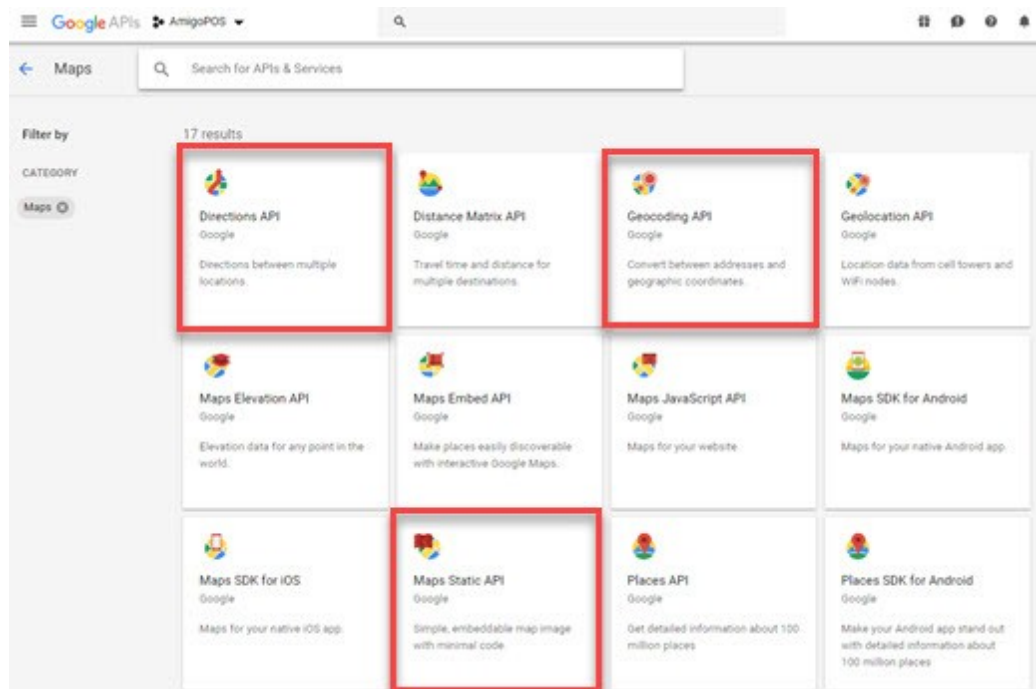
4. Click **ENABLE APIS AND SERVICES**



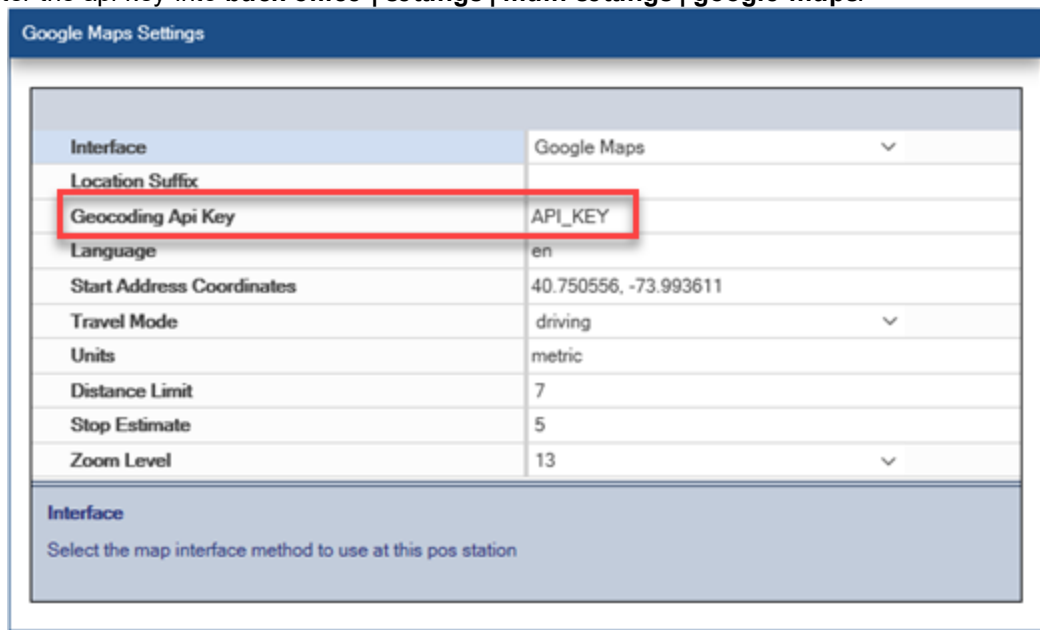
5. Select **Maps** | **View All**



6. Enable the **Directions API**, **Geocoding API** and **Maps Static API**



3. Enter the api key into **back office | settings | main settings | google maps**.



14.6 Delivery App

The AmigoPOS Delivery App is available for Android devices and can be downloaded from the [Google Play](#) store. Download the app to your Android device and complete the following steps to begin using the app. In addition, a cloud service subscription is required to use the app.

Obtain a [Google Places API key](#)^[294] and enable Google Maps in back office | settings | main settings | google maps.

Google Maps Settings

Interface	Google Maps
Location Suffix	
Geocoding Api Key	API_KEY
Language	en
Start Address Coordinates	40.750556, -73.993611
Travel Mode	driving
Units	metric
Distance Limit	7
Stop Estimate	5
Zoom Level	13

Interface

Select the map interface method to use at this pos station

Enable the delivery app in back office | settings | main settings | mobile apps.

Mobile App Settings

Delivery App Enabled
☒

Delivery App Credit Card Processing Method

Serfinsa Transactor

TransactorComId

SERVFASANIX

TransactorComKey

1234567890

TransactorTransactionType

MANCOMPRANOR

TransactorComWorkstation

WORKSFASANI02

TransactorRequestUrl

https://pgtest.redserfinsa.com:2027/WebPubTransactor/TransactorWS?WSDL

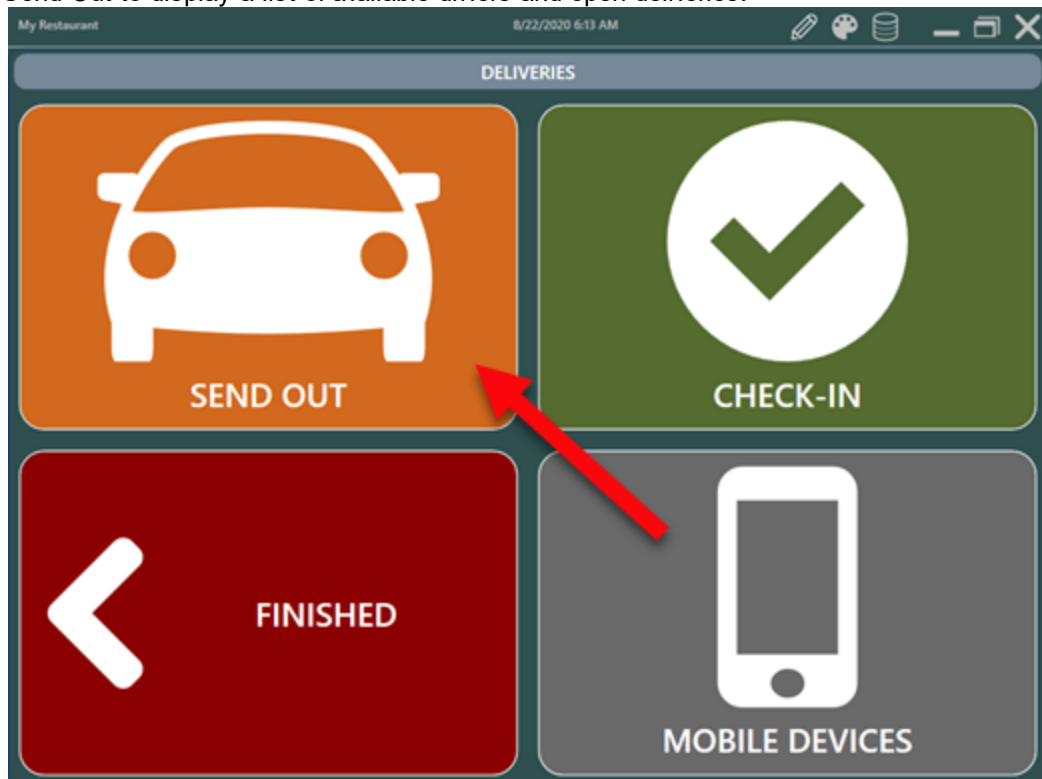
TransactorTerminalId

00299997

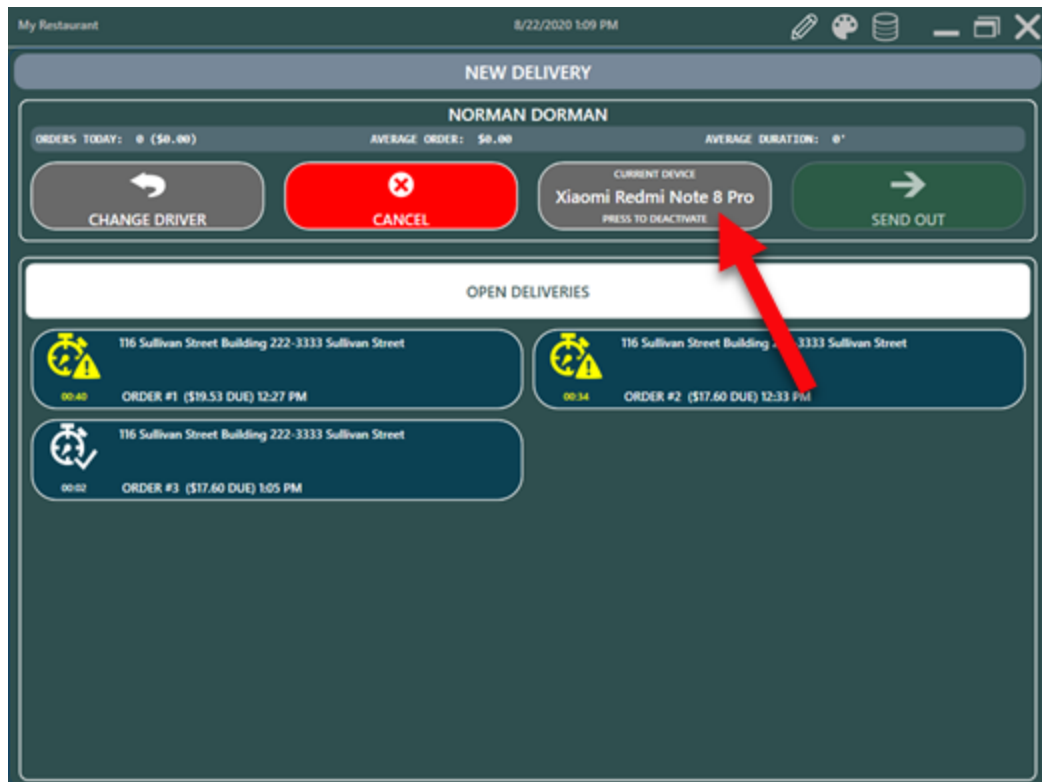
Submit a new delivery order and press Deliveries at the top right. If the Deliveries button is not visible, enable it in back office | settings | main settings | user interface | transaction buttons.



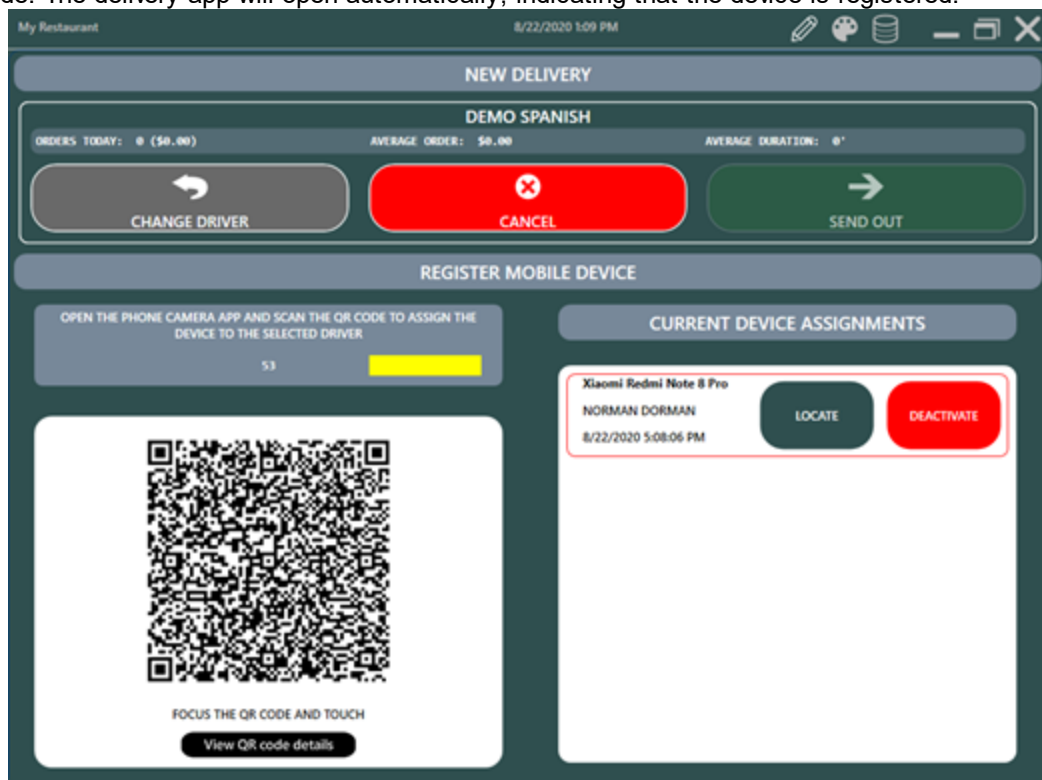
Press Send Out to display a list of available drivers and open deliveries.



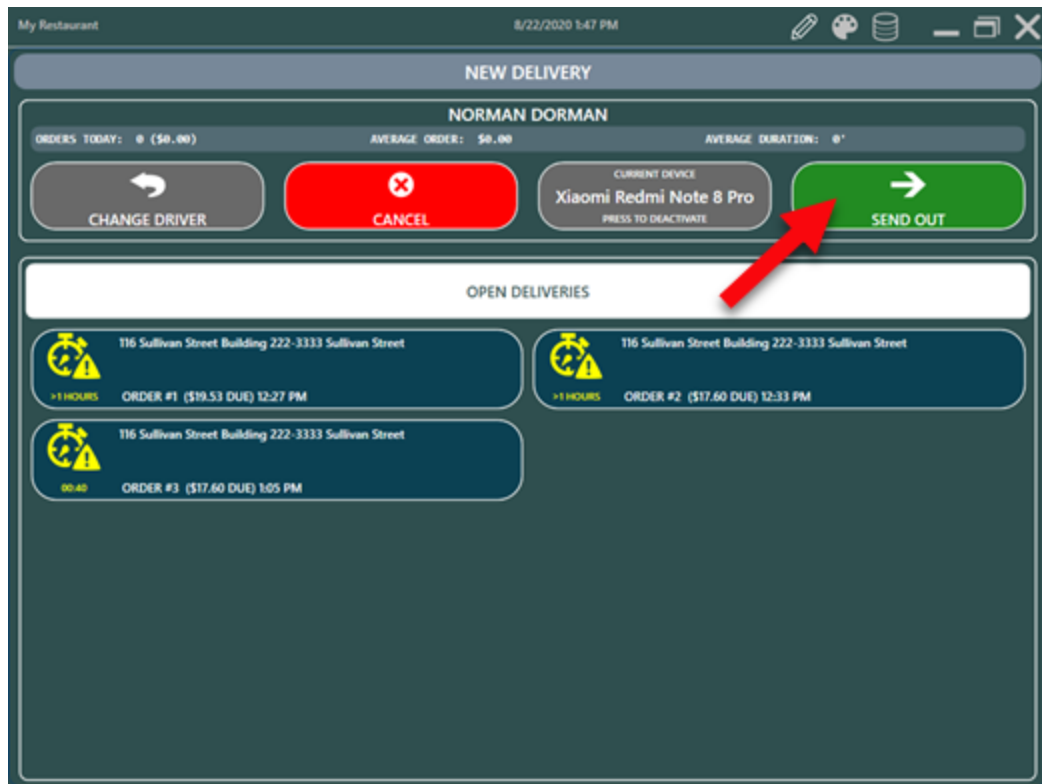
Select the driver. If the driver is already assigned to a device, the open deliveries orders list will appear with the device name displayed at the top.



If the driver is not assigned to a device, the device registration prompt will appear so that the driver can scan the QR code to assign the device to the driver. Open the camera app on the phone and focus the QR code "View QR code details" button appears. Touch the "View QR code details" button to scan the QR code. The delivery app will open automatically, indicating that the device is registered.



After the device is assigned to the driver, select the orders and press Send Out.



Press the refresh button on the app or allow up to 30 seconds for the trip information to appear automatically. The following video displays the QR code capture process on the android device.

Devices

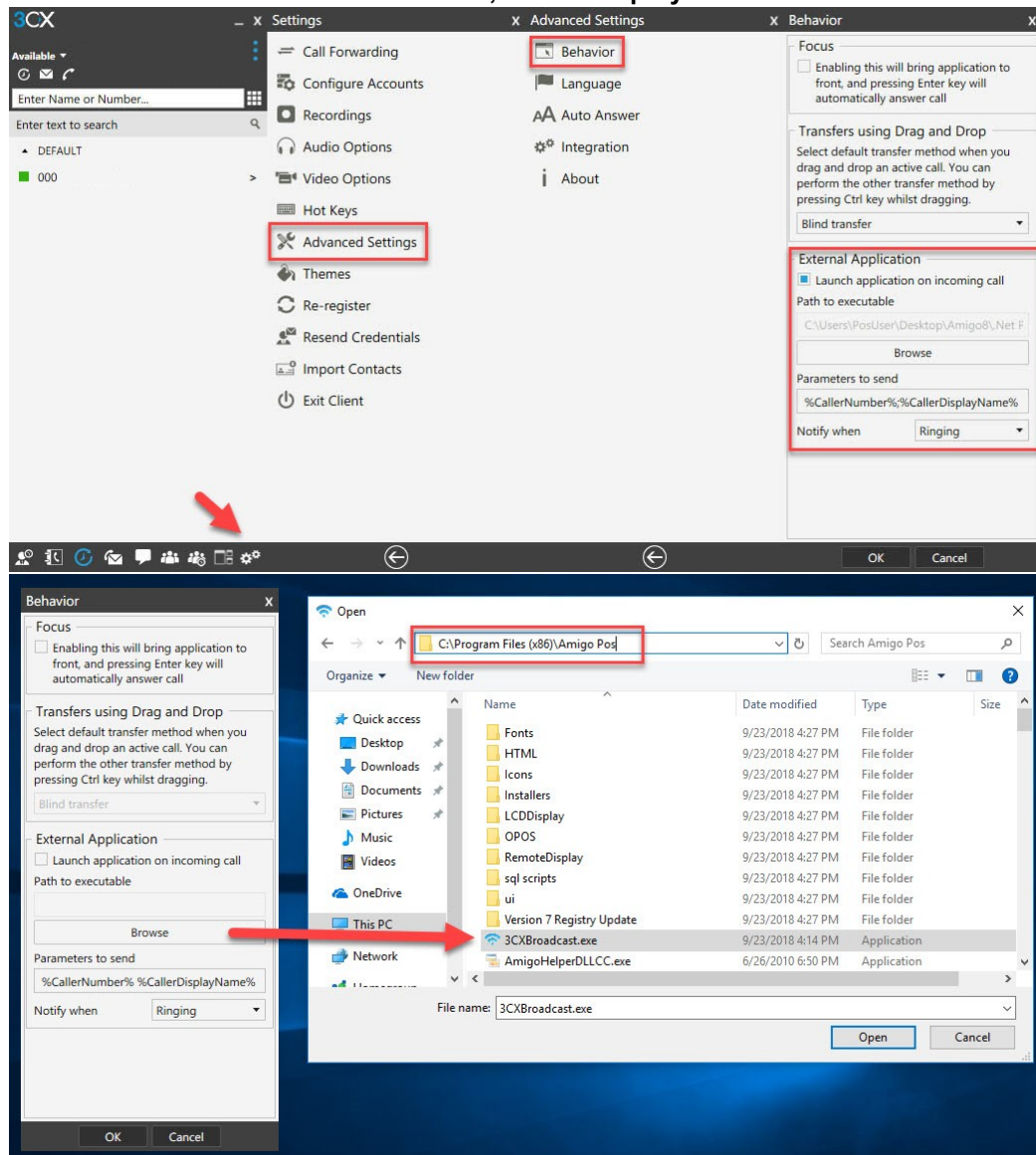
15 Devices

15.1 3CX PBX

Complete the following steps (only at the computer where the 3CX server is running) in order to broadcast calls received by the 3CX software PBX.

1. Install and configure the 3CX Windows Client as described at <https://www.3cx.com/user-manual/installation-windows/>.
2. Run the 3CX Windows client and navigate to **Settings/Advanced Settings/Behavior/External Application** and click Browse. Select the **3CXBroadcast.exe** application in the AmigoPOS installation directory. Insert a semicolon between the tokens in the **Parameters to send** field (or copy and paste the text below) and click OK.

%CallerNumber%;%CallerDisplayName%



15.2 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](#) 
- [OPOS](#) 
- [Serial Port](#)

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 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 | Devices.

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):

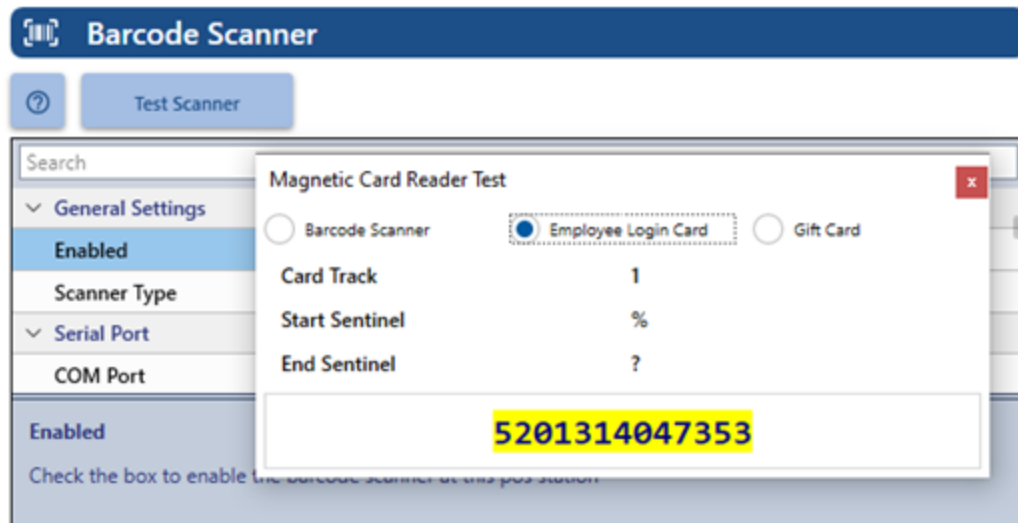
123456~ |

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.



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 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](#)³⁹². Select **OPOS** next to **Scanner** type in Back Office | Settings | Devices.

Serial Port Scanners

AmigoPOS can communicate with the scanner directly through the serial port. Select **Serial** next to **Scanner** type in Back Office | Settings | Devices. 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.

Barcode Scanner

?

Test Scanner

Search

General Settings

Enabled

☒

Scanner Type

Serial

▼

Serial Port

COM Port

COM3

▼

Baud

9600

▼

Data Bits

8

▼

Stop Bits

1

▼

Scanner Type

Select the scanner interface type

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. <SCAN OPTIONS>



2. <DATA> <SUFFIX>



3. ENTER





Back office Configuration

Enable the barcode scanner in Back Office | Settings | Devices 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

 **Barcode Scanner**

 Test Scanner

▼ General Settings

Enabled	<input checked="" type="checkbox"/>
Scanner Type	Keyboard Wedge ▼
> Serial Port	
> OPOS Drivers	

Scanner Type
Select the scanner interface type


▼ Barcode Settings


Wedge Scanner Terminator	~
Expand UPC E Barcode to UPC A	<input type="checkbox"/>
Trim Barcode Leading Digit	<input type="checkbox"/>
Trim Barcode Trailing Characters	<input type="checkbox"/>

Scanner Type
Select the scanner interface type

Serial Port Scanner

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

 **Barcode Scanner**

 Test Scanner

Search

General Settings

Enabled

☒

Scanner Type

Serial

▼

Serial Port

COM Port

COM3

▼

Baud

9600

▼

Data Bits

8

▼

Stop Bits

1

▼

Scanner Type

Select the scanner interface type

OPOS Scanner

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

Barcode Scanner

Test Scanner

Search

General Settings

Enabled ☒

Scanner Type OPOS

Serial Port Scanner Type

OPOS Device Select the scanner interface type

OPOS Device Name POSSCANNER

Barcode Settings

Random Weight Barcodes

Scanner Type

Select the scanner interface type

15.3 Caller Id Box

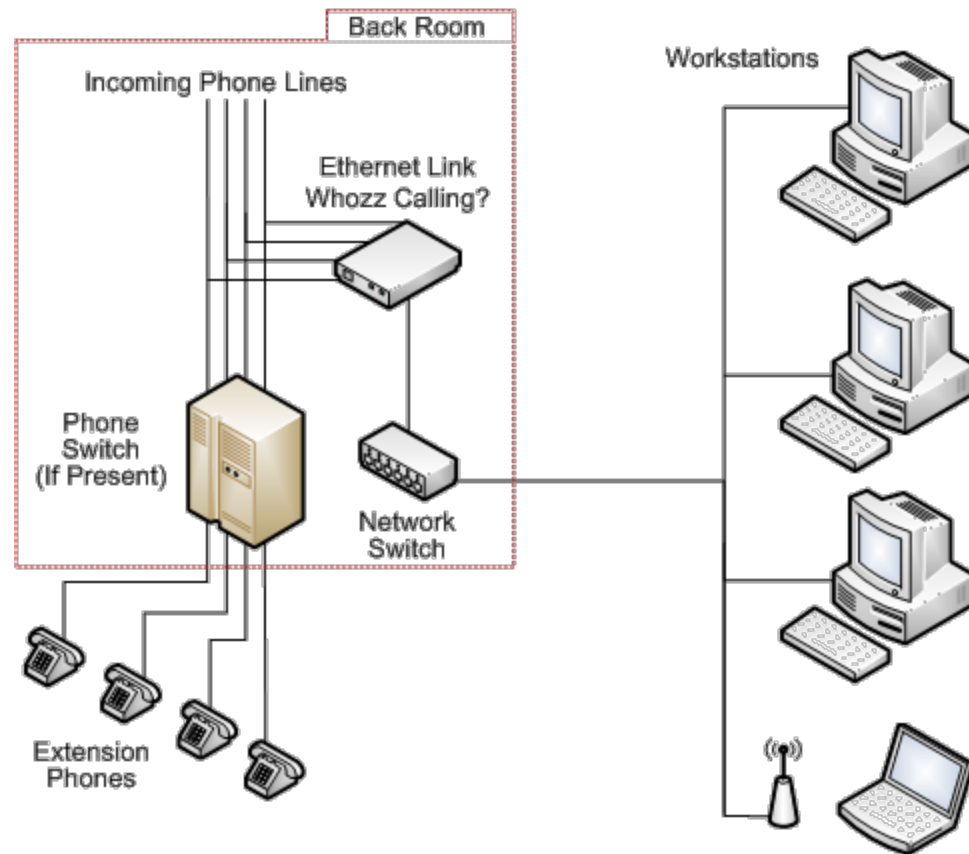
15.3.1 Setup

AmigoPOS can display incoming call information by utilizing the Whoozit® caller id box, available at <https://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.

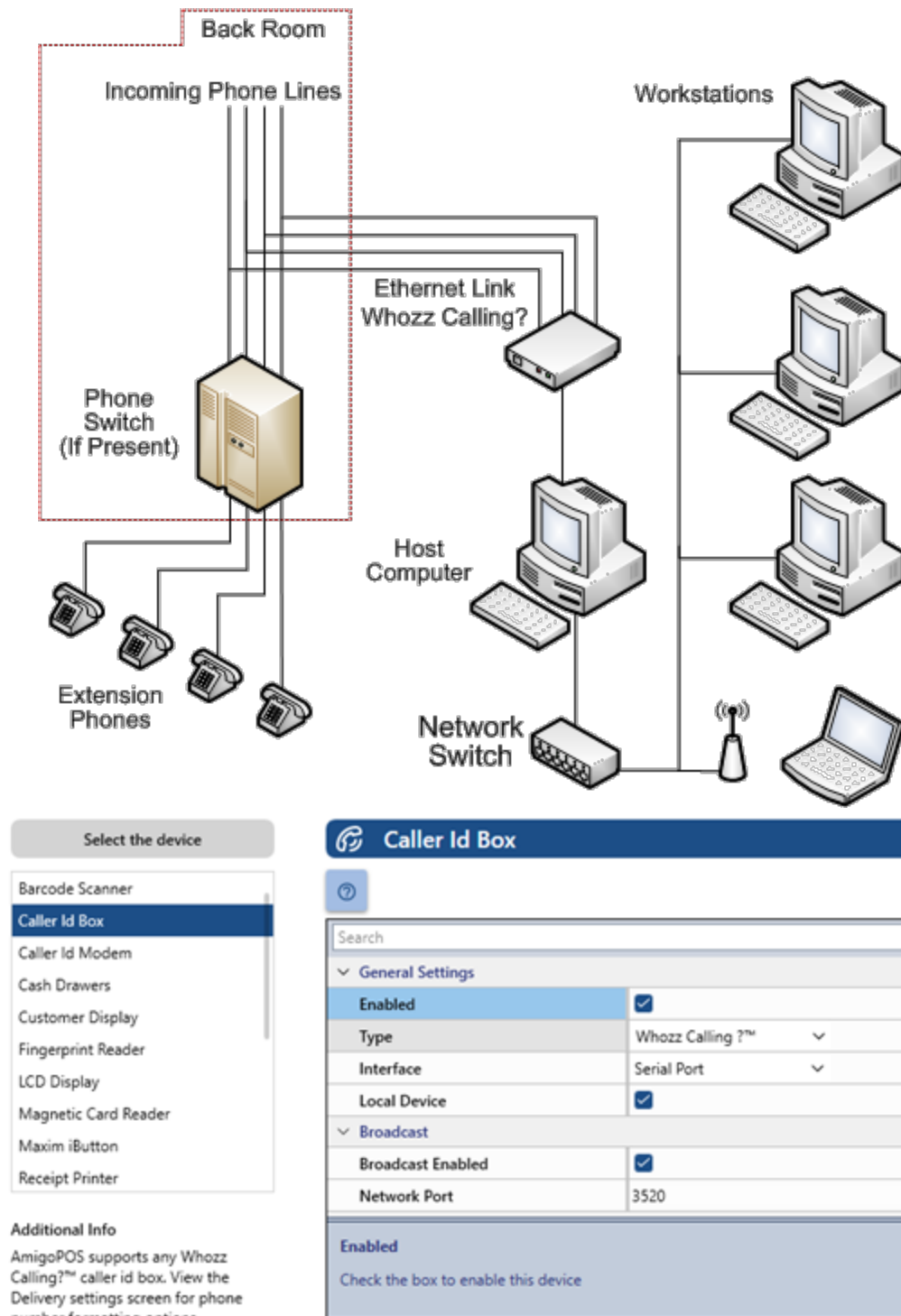
AmigoPOS maintains a record of customers' previous orders so that you will have access to a customer's previous activity while the phone is still ringing.

Caller id boxes are available with a choice of 2 interfaces:

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.



Serial Port: This type of box is connected directly to a pos station or back office computers, which then broadcasts the caller id data to other network computers.



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.

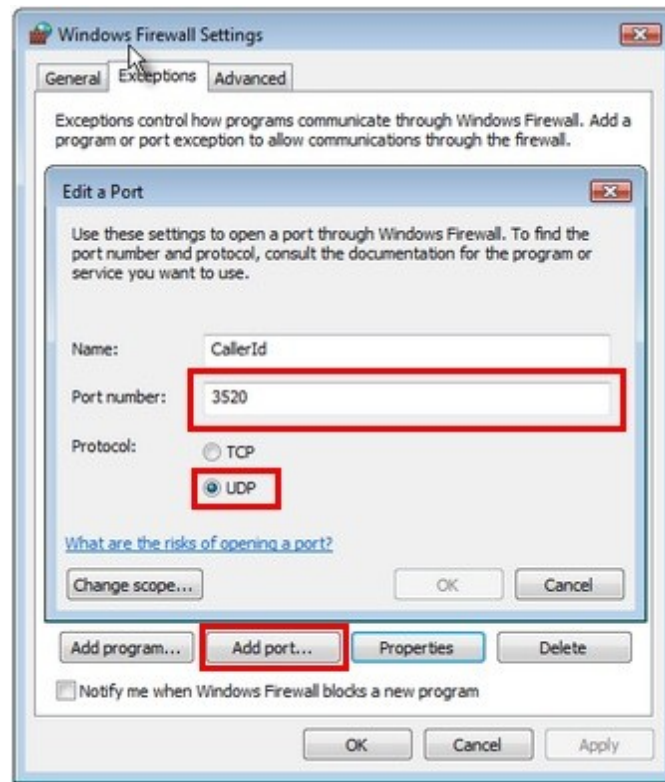
After logging in as a manager or supervisor, open Back Office | Settings | Devices and select Caller Id from the drop-down list. First, check the box next to **Enable this device**. If the caller id unit is physically connected with an (RS-232 serial cable) to the pos station that you are configuring, 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 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 | Devices 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.

The image shows two screenshots from the AmigoPOS software. The left screenshot shows the 'Select the device' dropdown menu with 'Caller Id Box' selected. The right screenshot shows the 'Caller Id Box' configuration window. In the 'General Settings' section, 'Enabled' is checked, 'Type' is 'Whozz Calling ?™', 'Interface' is 'Ethernet', and 'Local Device' is checked. In the 'Broadcast' section, 'Broadcast Enabled' is unchecked and 'Network Port' is '3520'. At the bottom, there is a blue bar with the text 'Enabled' and 'Check the box to enable this device'.

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](#)^[314] for instructions on adding a Windows 7 firewall exception.

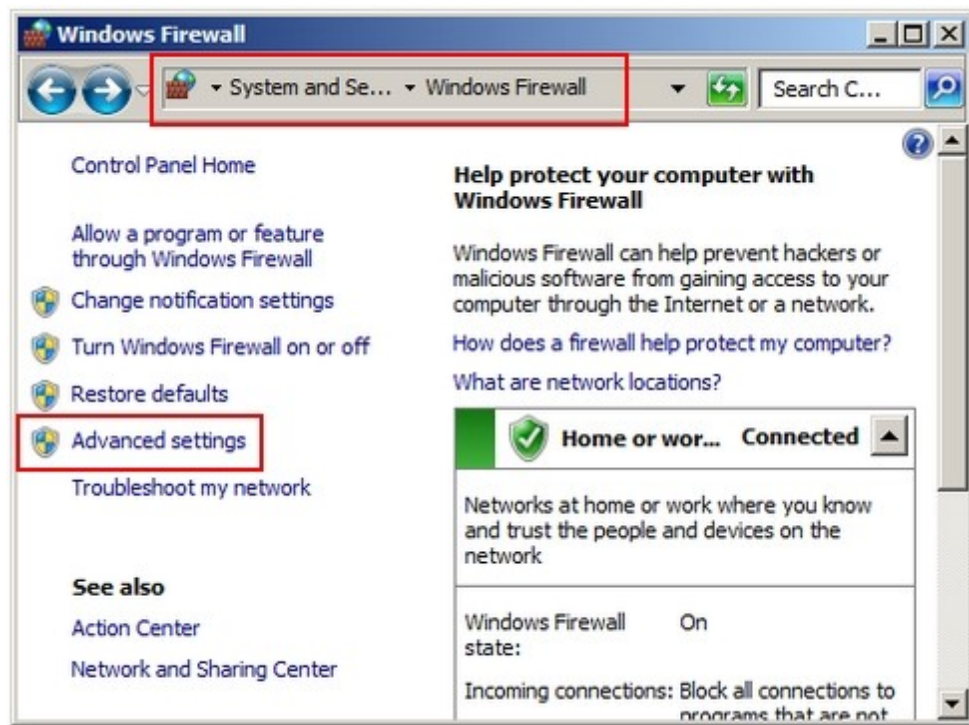


Usage

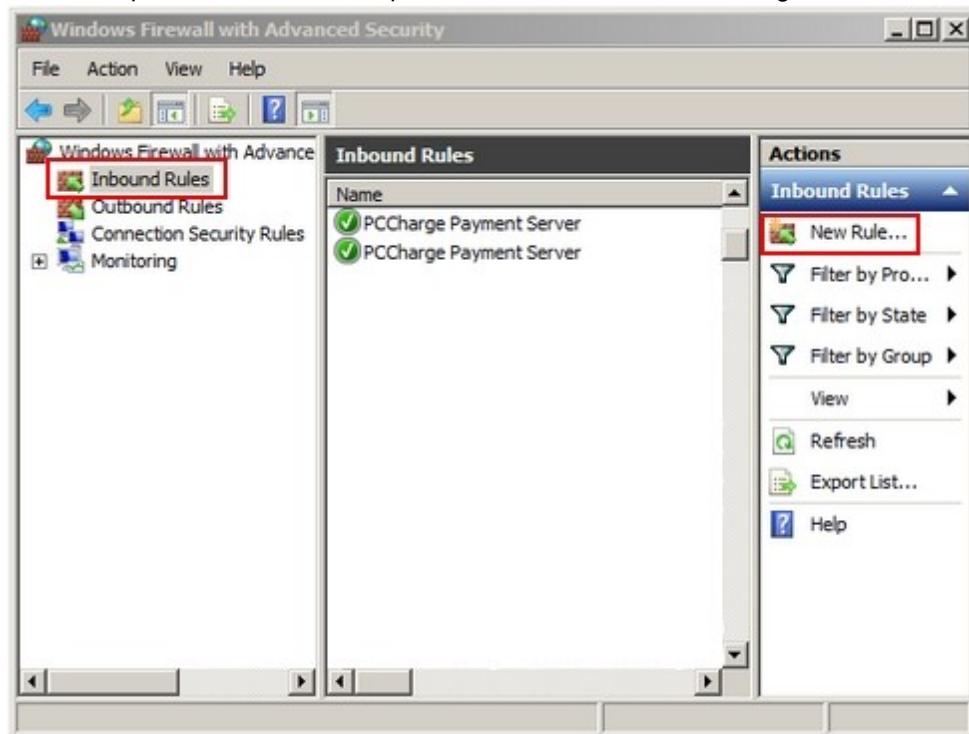
After the caller unit is configured, exit back office and restart AmigoPOS. Call any of the connected lines and a small message window will appear at the bottom of the screen indicating the name and the phone number of the incoming caller. Press the Delivery or Pick Up order type to view a list of the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

15.3.2 Firewall Exception

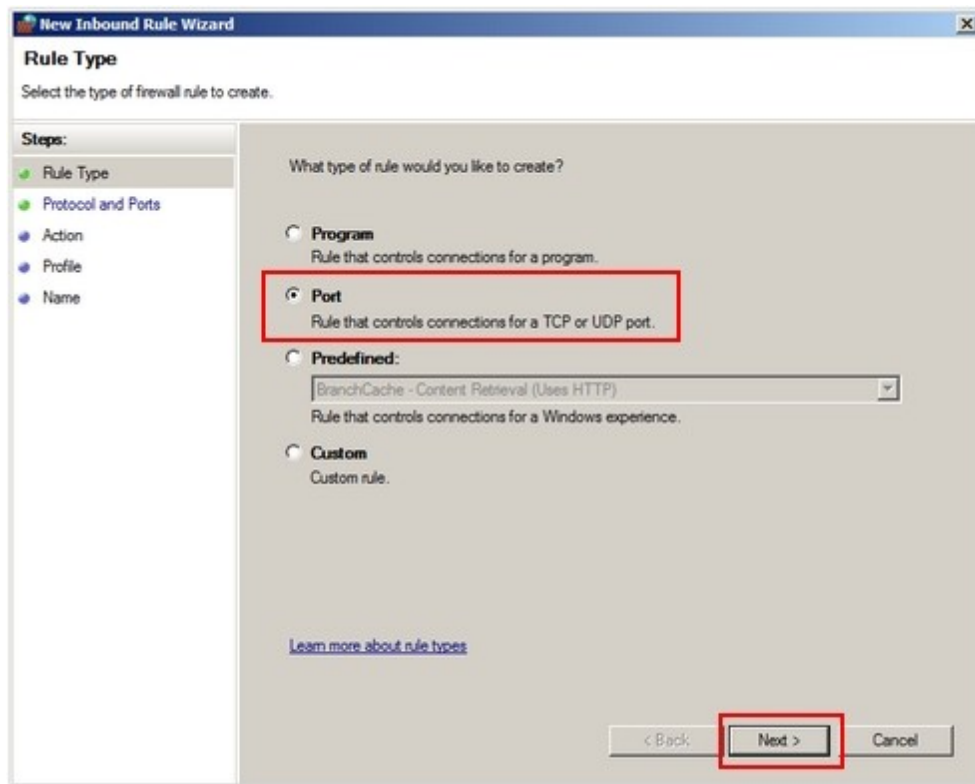
The following procedure can be used to add a firewall exception for the Whozz Calling caller id box or other application features that require a firewall exception. To add a firewall exception in Windows 7, open the Windows Control Panel | Windows Firewall applet. Click Advanced Settings.



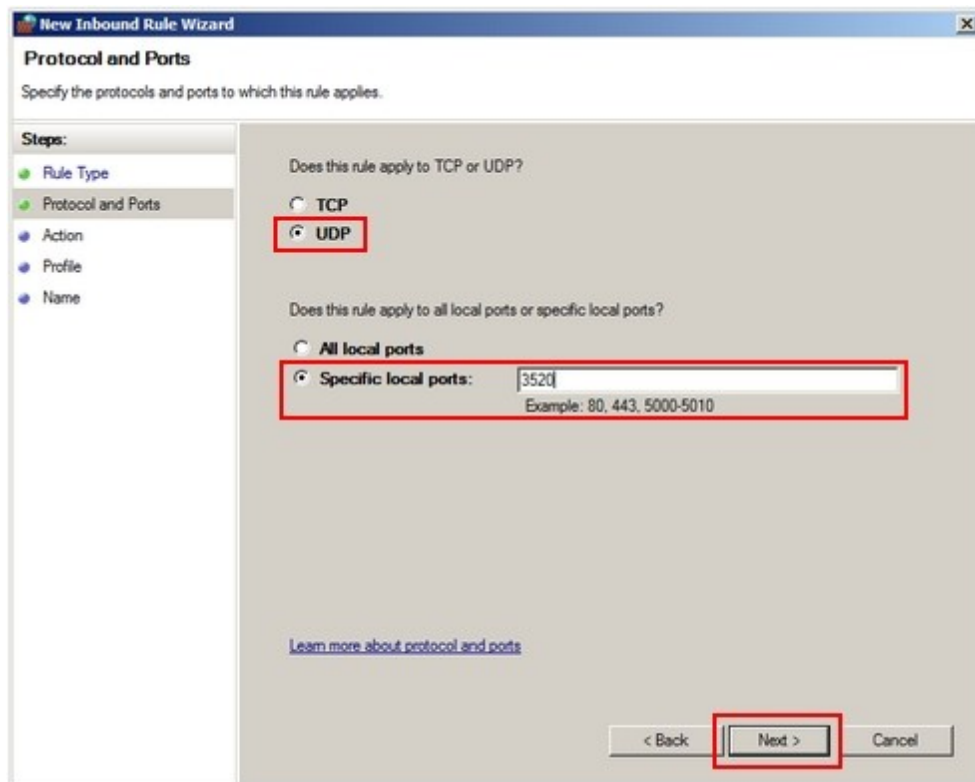
The caller id box requires an inbound exception. Click **New Rule...** on the right.



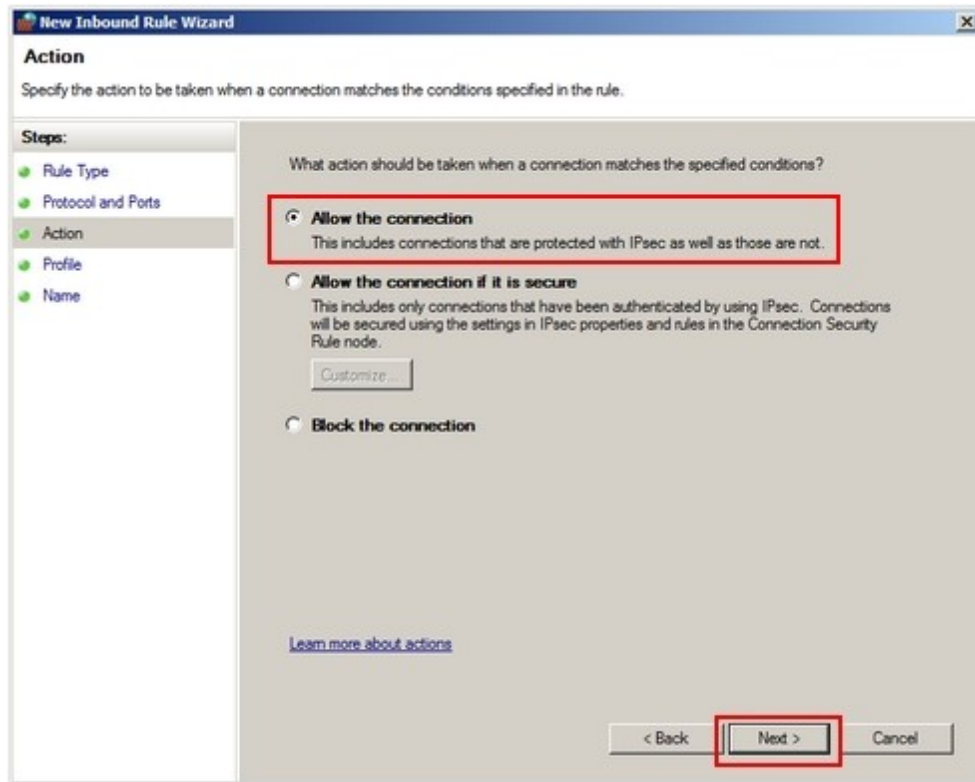
Select Port and click **Next**.



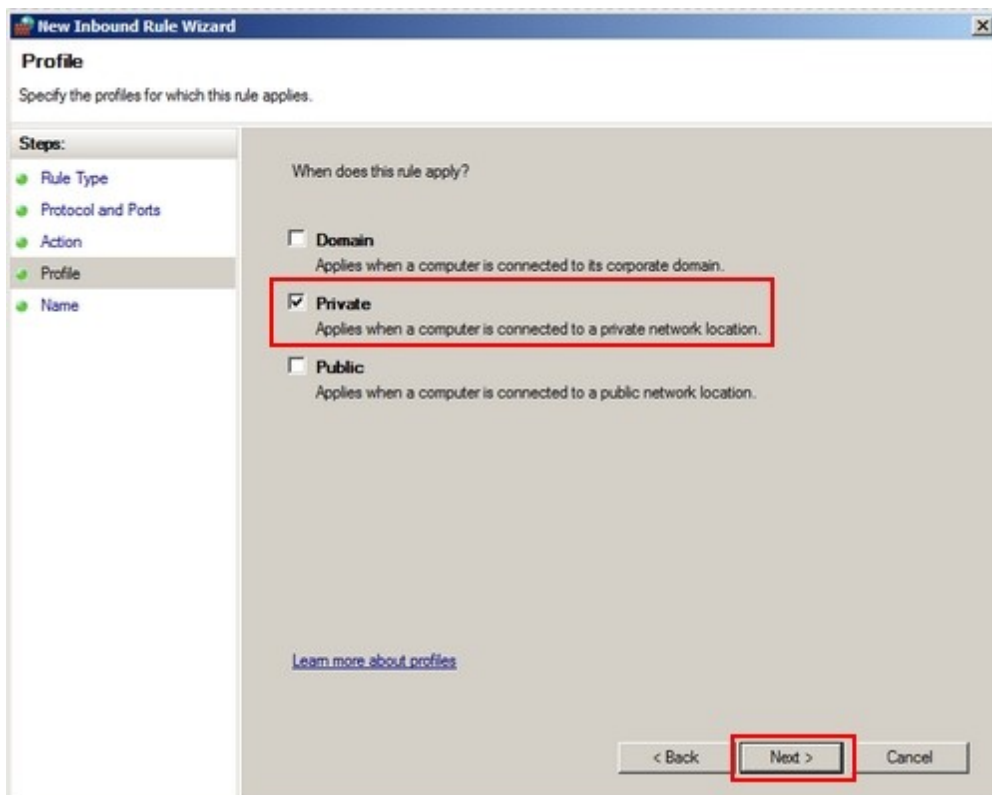
Select **UDP**, enter the port number (the default port for the callerid.com Ethernet device is 3520) and click **Next**.



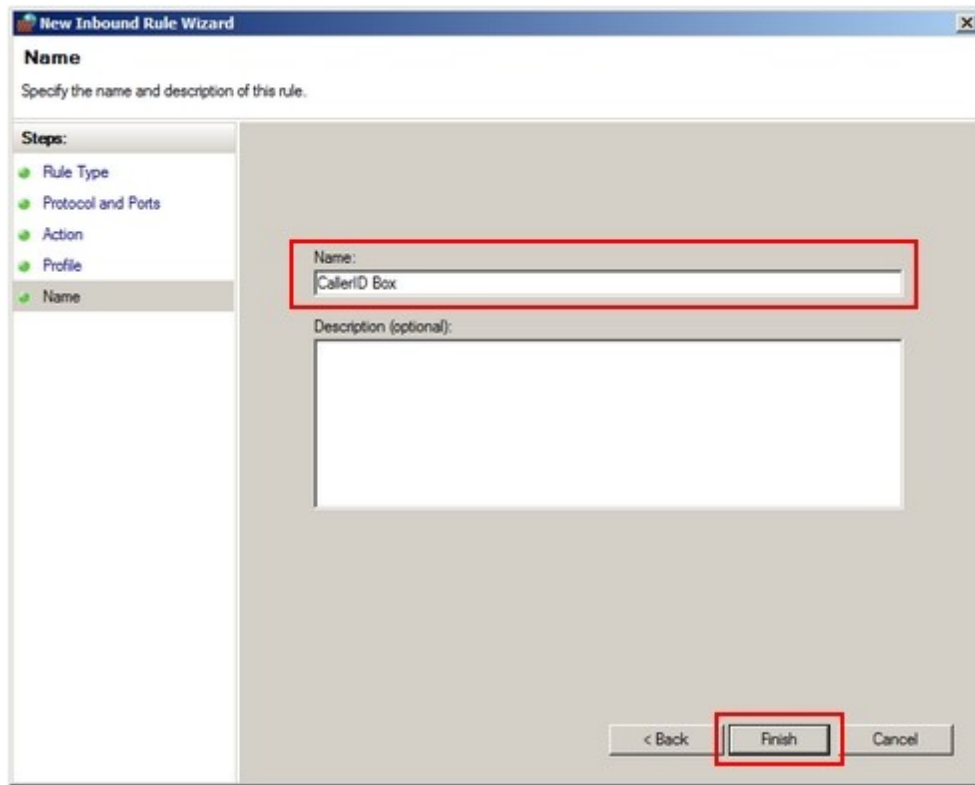
Use the default Action setting and click Next.



Select Private network and click Next.



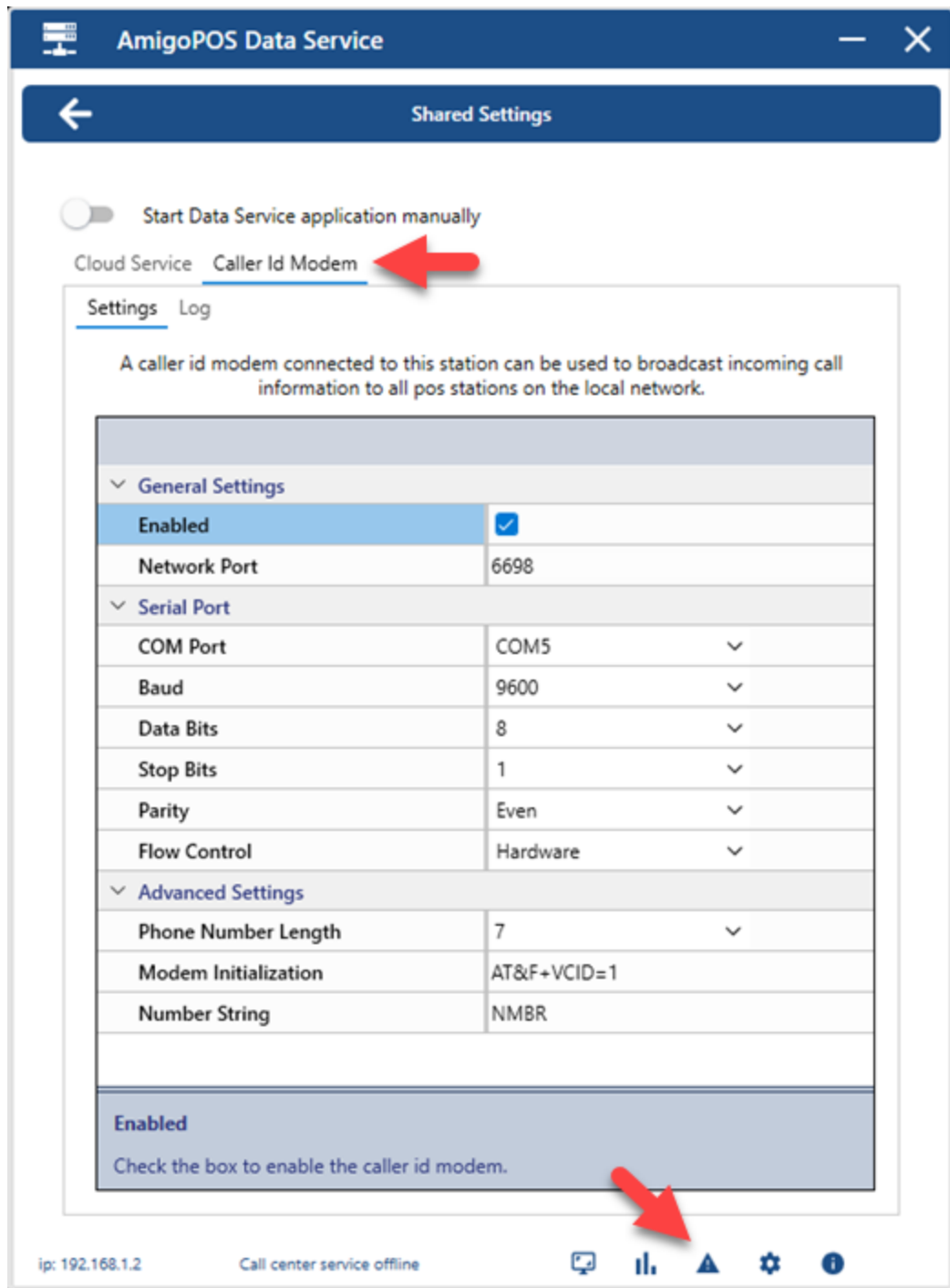
Enter a friendly name for the rule and click **Finish**. The new rule works immediately and does not require a program restart.



15.4 Caller Id Modem

AmigoPOS supports a single caller id enabled modem attached to the main pos station where the data service application is running. The default settings are intended for users in North America.

Settings

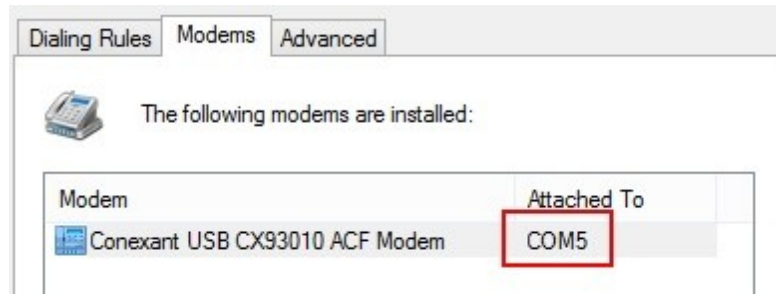


General Settings

- **Enabled:** Set to Yes to enable the caller id modem interface
- **Network Port:** Enter the network port on which to broadcast the caller id data so that pos stations can display the caller id popup. The default port is 3520 and any unused port can be entered. Add a [firewall exception](#)^[314] to allow UDP communications on the network port.

Serial Port Configuration

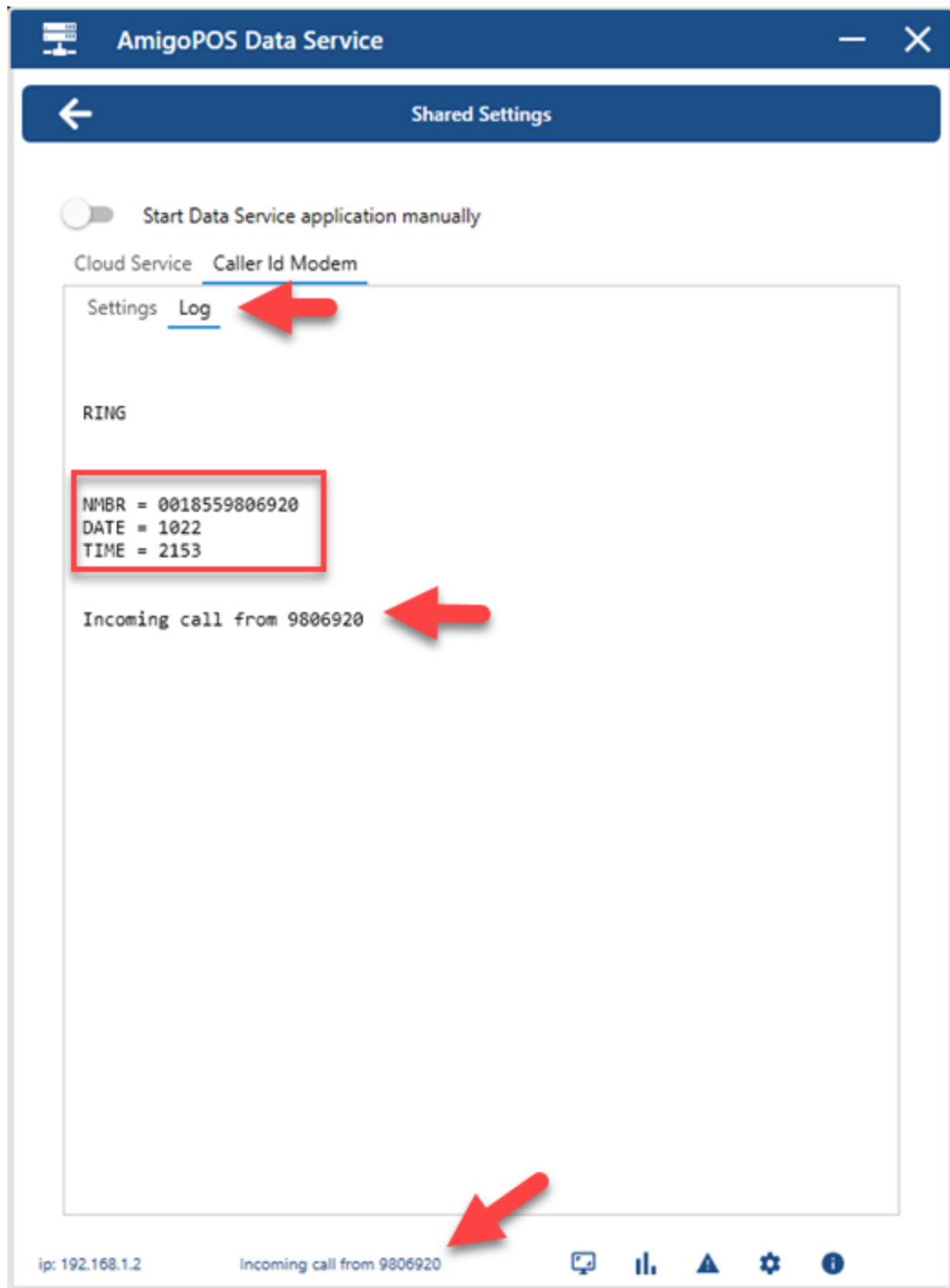
Open the Windows Control Panel | Phone and Modems applet to determine the COM port used by the modem. The other serial port settings can be ignored for most modems.



Advanced Settings

- **Phone Number Length:** Select the number of digits for the phone numbers in your region. For example, in some regions multiple area codes are in use, so that the number of digits is 10 (111-222-3333). In other regions where only one area code is in use, the number of digits is 7 (111-2222). The phone number received from the caller id modem will be trimmed to this length so that the extra left most digits are removed.
- **Modem Initialization:** If the modem requires initialization, enter the initialization string. For example, Zoom Modems v.92 with Conexant chipset are initialized using AT+VCID=1. Other common initialization strings include AT#CID=1, AT#CC1, AT%CCID=1, AT*ID1. Refer to the modem's user manual for addition information.
- **Number String:** Enter the text that appears before the phone number in the caller id modem event, not including the equal sign or space. The value is "NMBR" for North America.

To test the settings, switch to the Log tab and place a call. In the image below, the phone number length is set to 7 so that the phone number received from the caller id modem 0018559806920 is trimmed to 9806920, which is then used to search the customers list for a matching phone number.

**Modem Test**

As an alternative to using the 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.

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

RING

RING

DATE = 0530

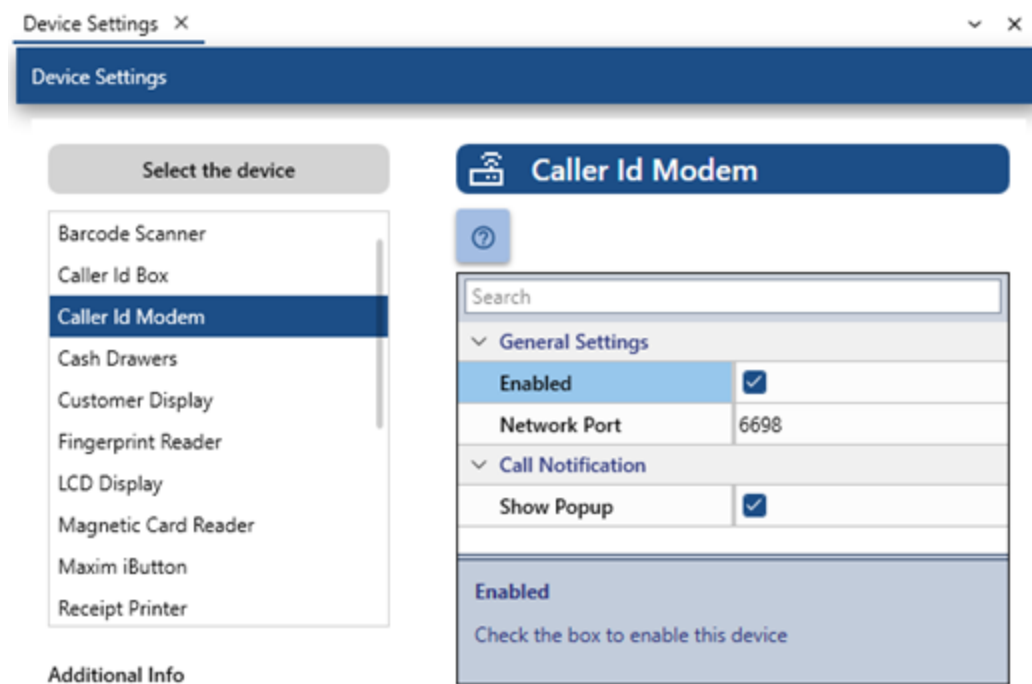
TIME = 0131

NMBR = 8777599827

NAME = AMIGO POS

Pos Station Settings

At each pos station, open back office | settings | devices and select Caller Id Modem. Enable the device, verify that the port number is correct and specify whether to enable the small pop-up window that appears when a new call is received.





15.5 Cash Drawers

15.5.1 Setup

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](#)^[320]. The currently supported cash drawers interfaces are:

- [Printer-Driven](#)^[320]
- [OPOS](#)

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 | Devices. If you cannot locate the proper documentation for your equipment, use the following chart as a guide.

⚙️

Cash Drawers

?
Test Drawer 1
Test Drawer 2

Search

▼ General Settings

Number of Drawers	2	▼
Drawer Interface	Printer Driven	▼

▼ Users

Assign Cash Drawers	<input type="checkbox"/>
----------------------------	--------------------------

▼ Drawer Codes

Printer Driven Drawer Codes 1	27,112,0,25,250
Printer Driven Drawer Codes 2	27,112,1,25,250

Number of Drawers

Enter the number of cash drawers at this station

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.

Important: 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]: **CD212**

COM Port Setting: HID#: Port: COM1

Communication Settings:

- Baud Rate: 9600
- Data bits: 8
- Stop bits: 1
- Parity: None
- Hand Shaking: None

Status Indicators:

- Open/close drawer status indicator
- ☒ CTS line
- ☐ Ring line

Drawer Detail:


- Drawer Number: 1


Data Transmission:

- First ASCII open drawer character (decimal value): 91
- Second ASCII open drawer character (decimal value): 91

Health Check (Interactive)

Finish Cancel


Cash Drawers


 Test Drawer 1

General Settings

Number of Drawers	1	▼
Drawer Interface	OPOS	▼

Users

Drawer Codes

OPOS

OPOS Drawer Name 1	CD212
OPOS Drawer Name 2	

Drawer Interface

Select the drawer interface. Printer-driven is recommended.

OPOS Drawer Name 1
 Enter the cash drawer 1 logical device name configured in the manufacturer's documentation.

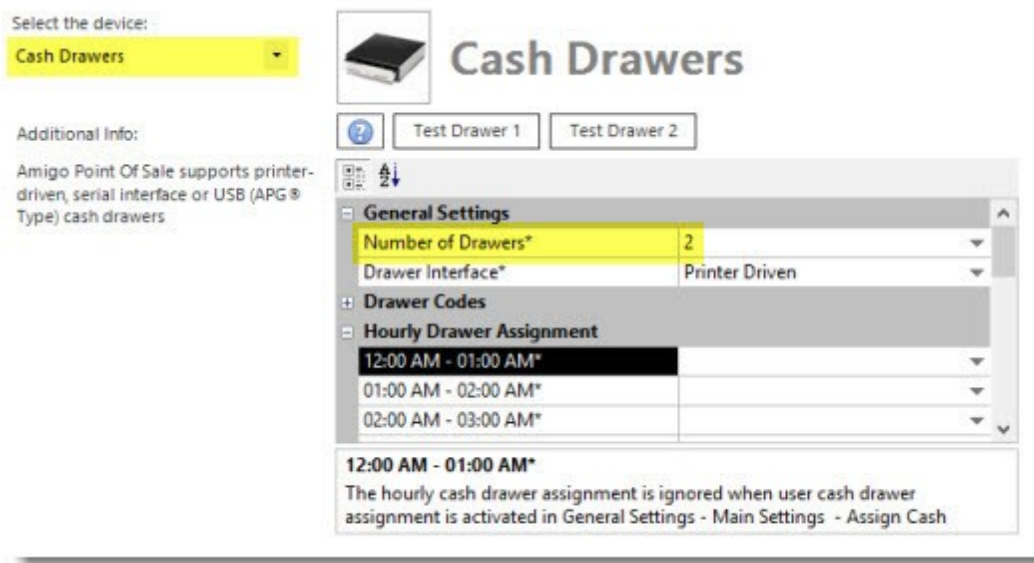
15.5.2 Dual Cash Drawer Usage

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 | Devices | Cash Drawers to use multiple drawers.

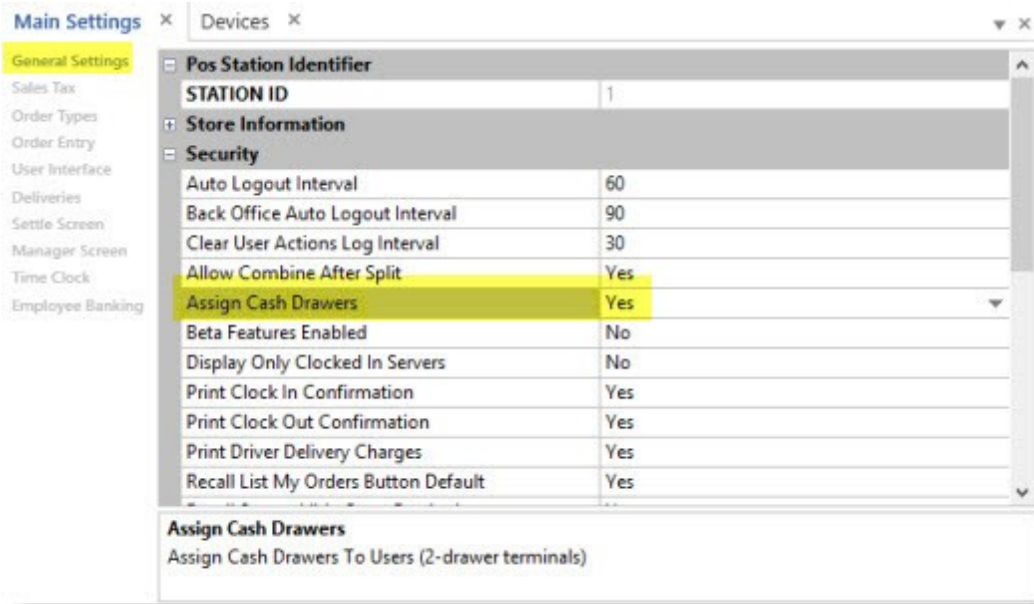
1. Set Active Cash Drawer Depending On Hour Of Day

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 | Devices 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.



2. 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 | Devices, 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.



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.

Main Settings Jobs Time Sheet Schedule Activity

All Job Types +

Employee name contains X

☒ Hide Inactive Employees

DORMAN NORMAN

HAYWITH RITA

MCINERNEY SHANE

O'TOOLE OLIVER

SPANISH DEMO

USER DEMO

Identification

Display Language

Login

Contact Information

Demographics

Timedlock Preferences

Time Clock Mandatory No

Schedule Mandatory No

Date Hired 01/08/2006

Released No

Date Released 15/04/2004

Reason Released

Automobile Information

Time Clock Mandatory

Set to Yes to force the employee to clock in before using the pos

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

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

Permissions X

Add new job type X +

CASHIER X

CHEF X

COOK X

DISHWASHER X

DRIVER X

FOOD PREP X

GENERAL MANAGER X

HOSTESS X

☐ Show Description

Filter permissions X

Default Order Type:

None

☒ Allow Cash Drawer Open

☒ Allow Cash Sale

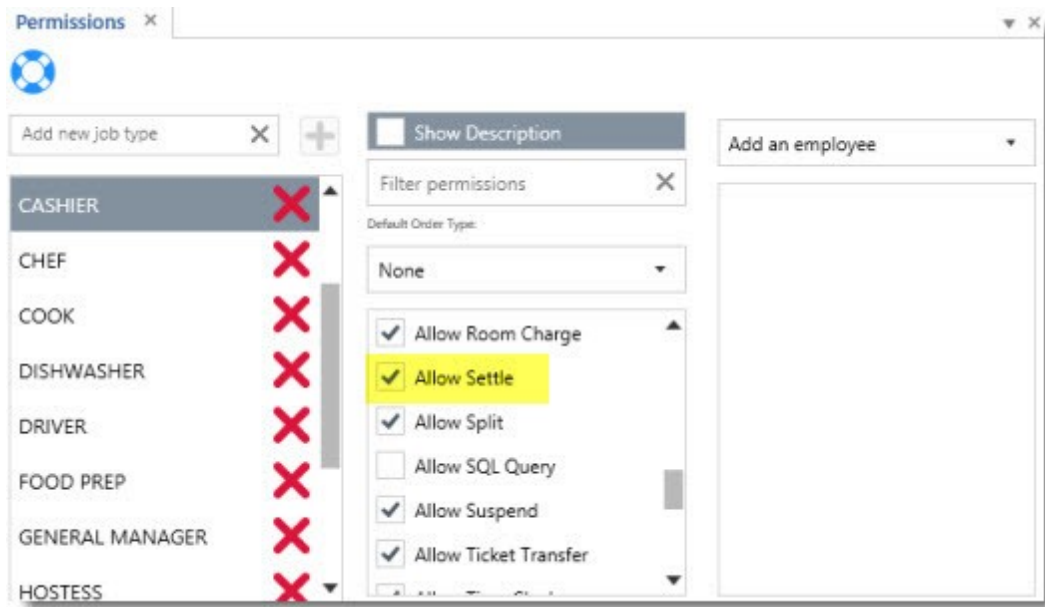
☐ Allow Combine

☐ Allow Comp

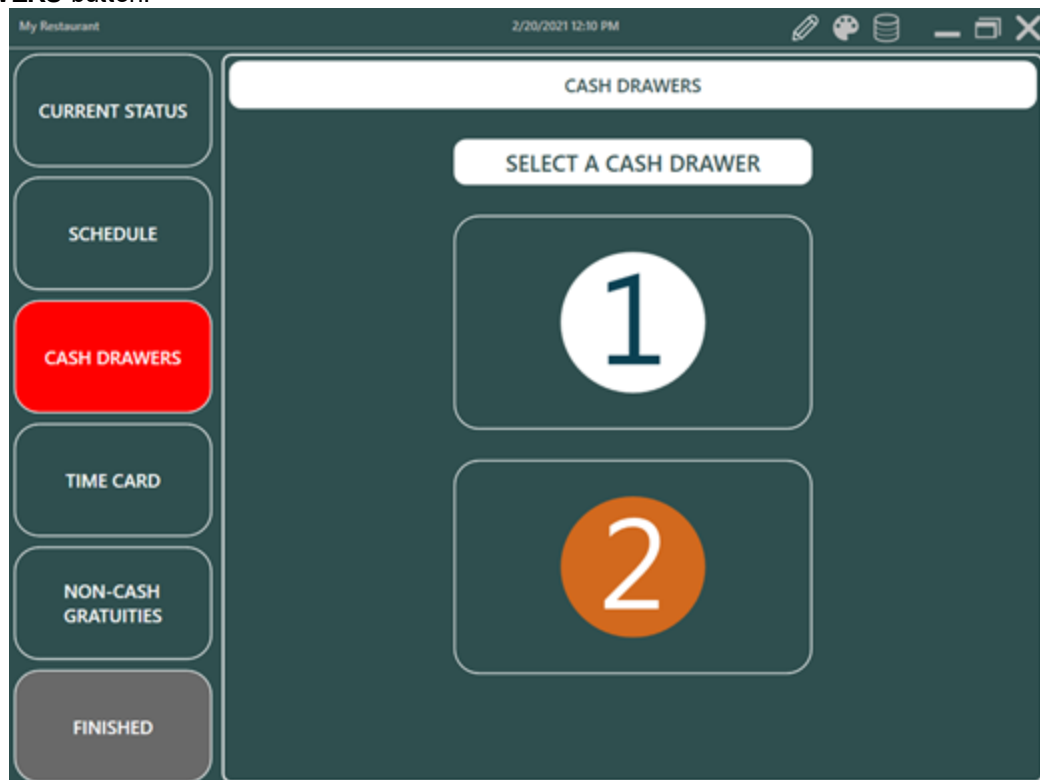
☐ Allow Credit Card Adjust

☐ Allow Credit Card Batch

Add an employee



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.

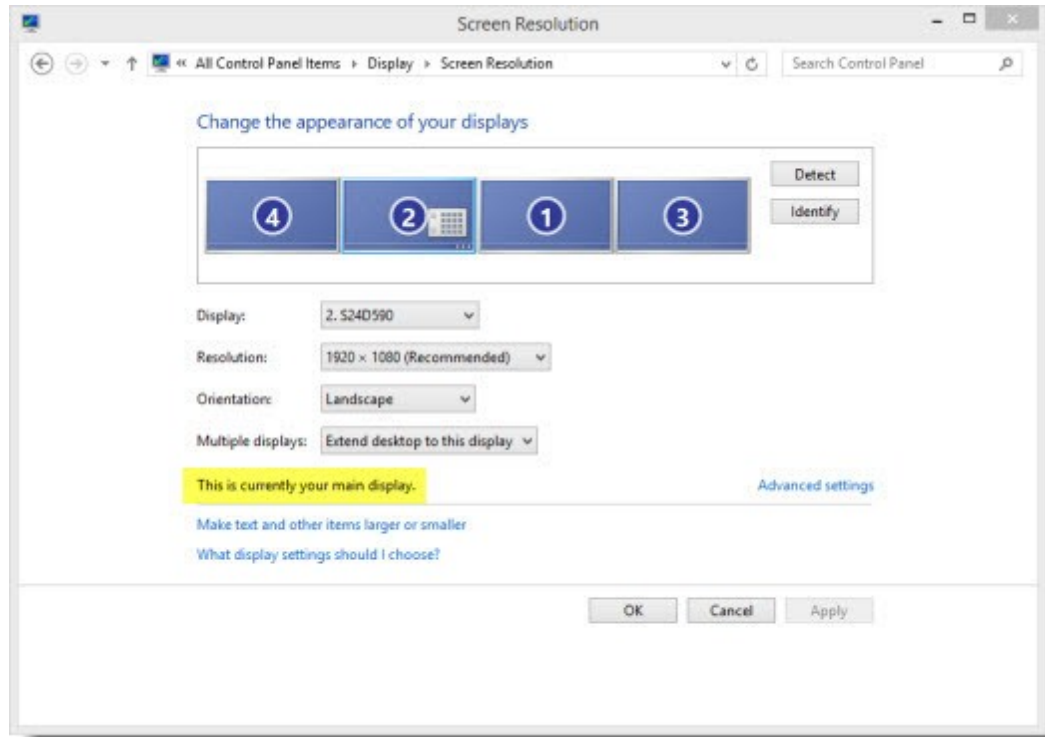


15.6 LCD Display

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

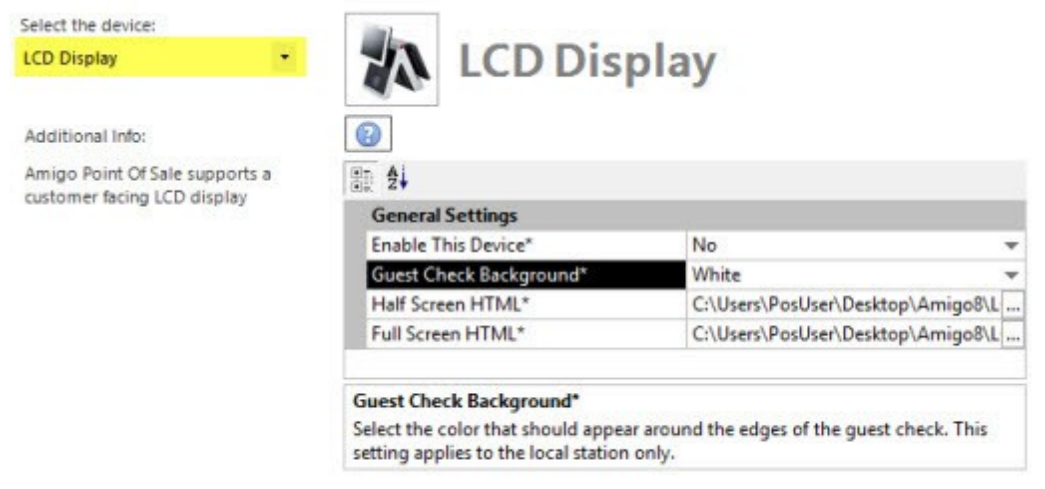
Display Setup

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.



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.

15.7 Fingerprint Setup

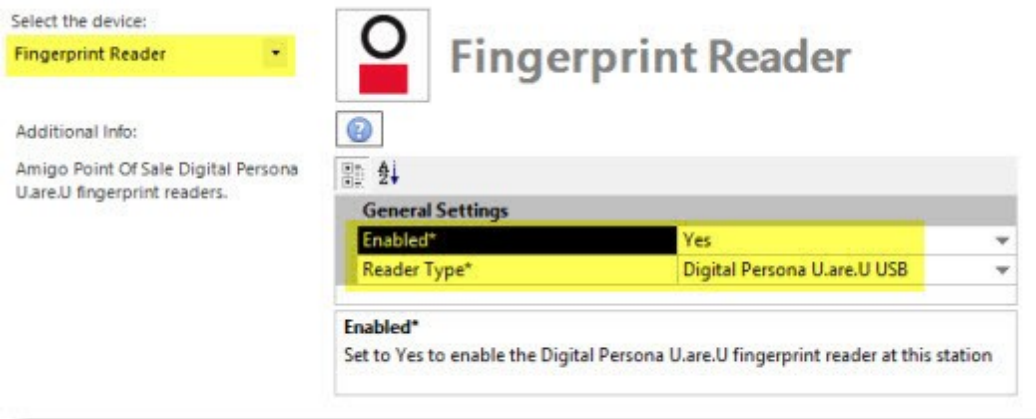
AmigoPOS supports the Digital Persona U.are.U fingerprint reader. Complete the following steps at each station to enable the fingerprint reader interface.

1. 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

2. In **Back Office | Settings | Devices**, select **Fingerprint Reader** from the drop-down list and set the value for **Enabled** to **Yes**.

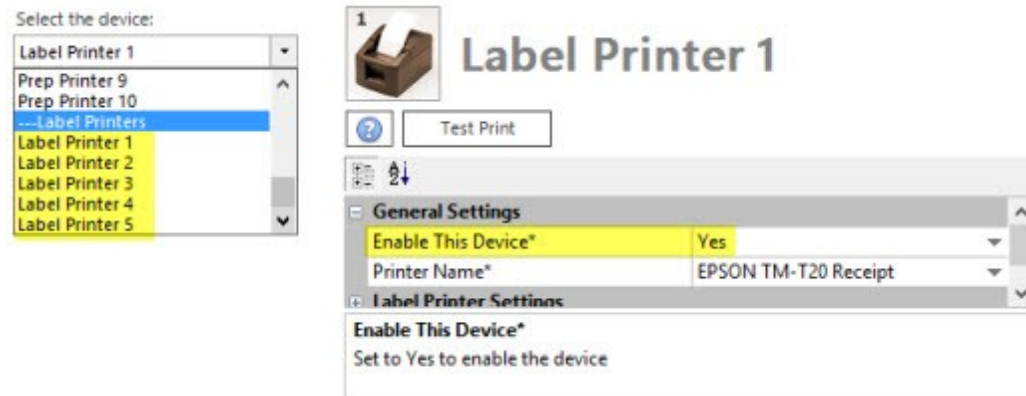


3. Refer to the [fingerprint login](#) ⁴⁵⁶ topic to enroll employees fingerprints.

15.8 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](#) description. Each printer can be configured in **Back Office | Settings | Devices**.

- [Settings](#)
- [Label Templates](#)
- [Menu Items](#)
- [Order Types](#)
- [Printer Driver](#)




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](#) 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



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>
  
```

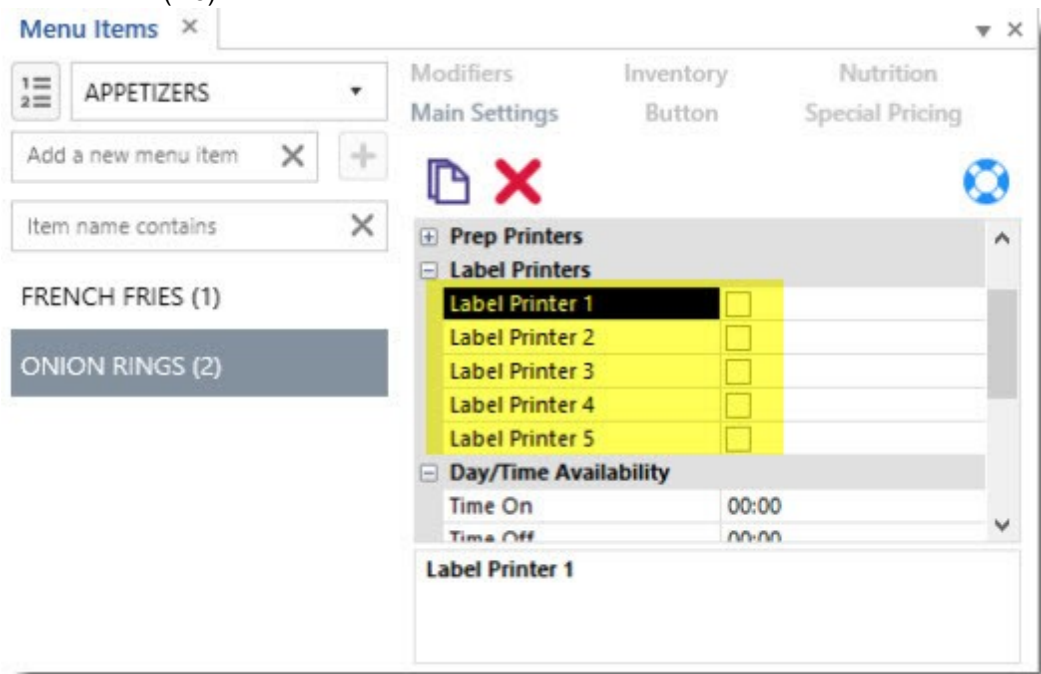
The following tokens are available:

<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

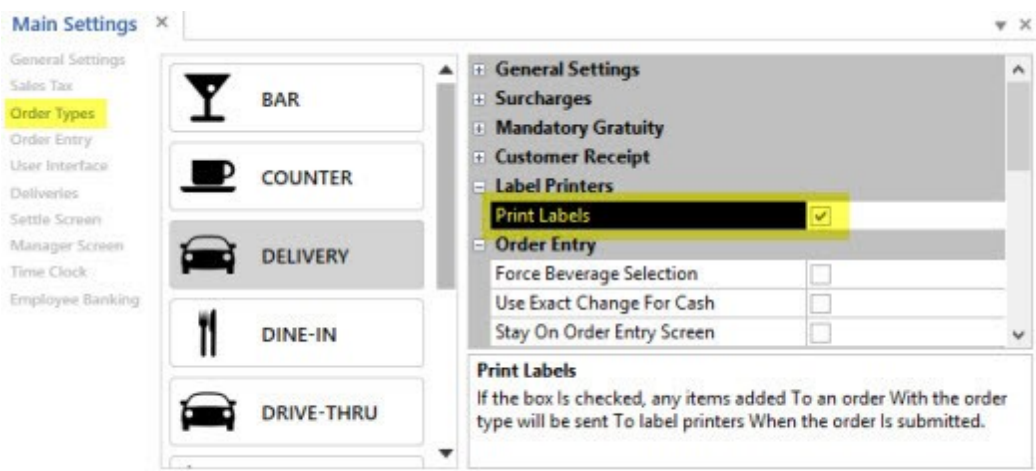
Menu Items

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



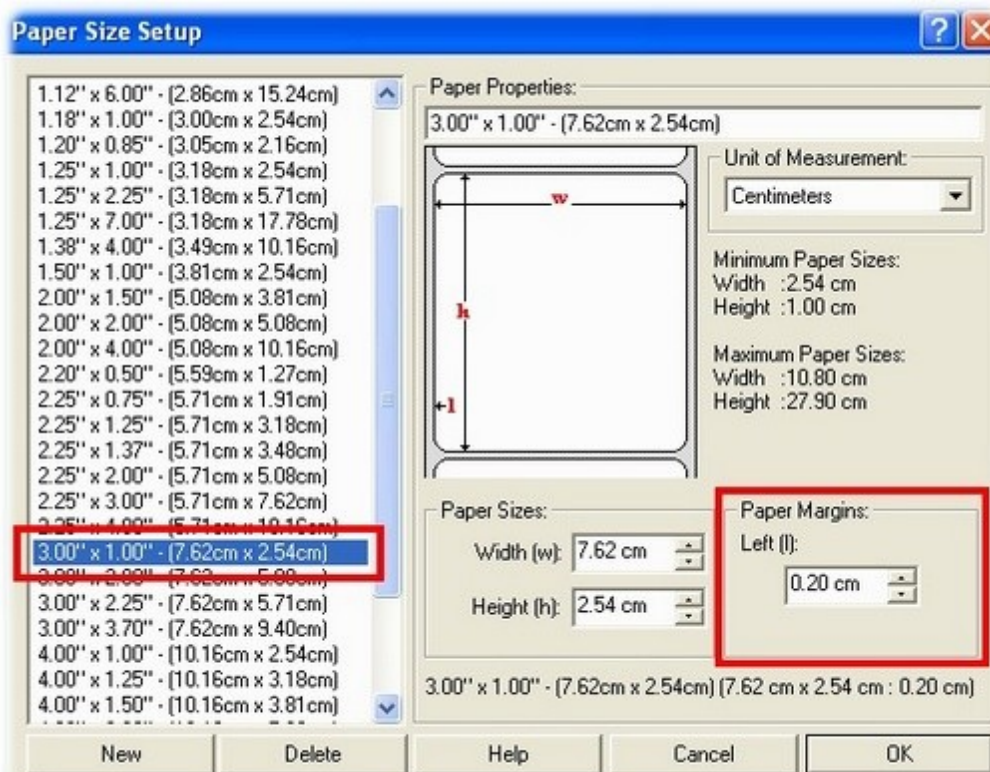
Order Types

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.



15.9 Maxim iButton

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.



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.



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 | Devices** 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.

The image shows two screenshots from the AmigoPOS Back Office. The top screenshot is the 'Maxim iButton' configuration window. It has a 'Select the device:' dropdown set to 'Maxim iButton'. Below it is a 'Test iButton' button. The 'General Settings' table is as follows:

General Settings	
Enabled*	Yes
Adapter Name*	DS9097U
Interface*	USB
Port Number*	0
Reader Serial Number*	

Below the table is a text field for 'Reader Serial Number*' with the instruction 'Enter the iButton reader serial number.'

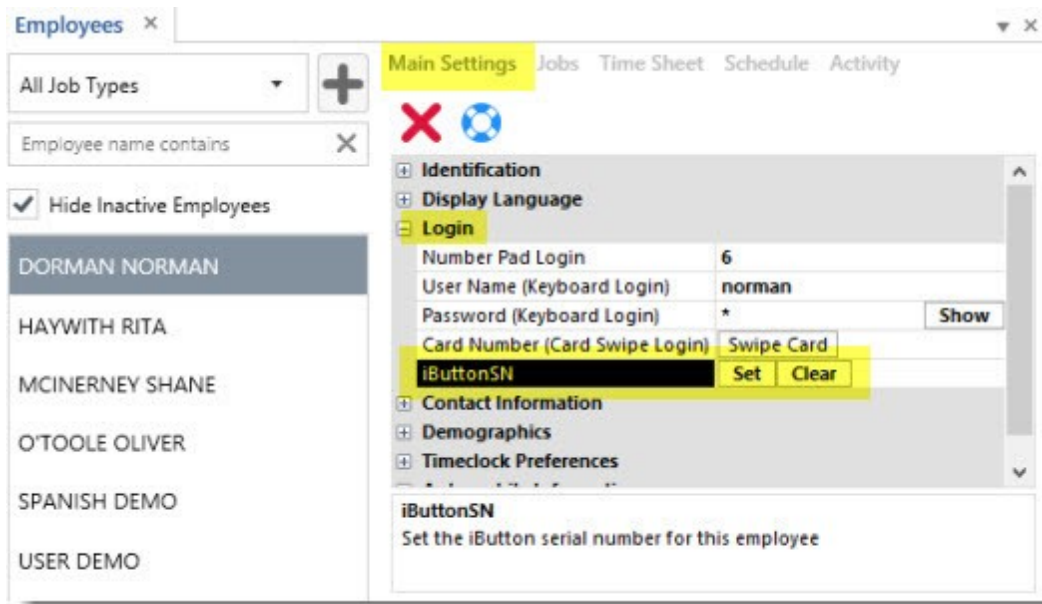
The bottom screenshot is the 'Main Settings' window, with the 'User Interface' tab selected. The 'Login Buttons' table is as follows:

Login Buttons	
Number Pad	Yes
Card Swipe	Yes
Keyboard	Yes
Fingerprint	Yes
iButton	Yes
Default Login Method*	Number Pad

Below the table is the 'Login Screen' section, which includes the 'iButton' option with the instruction 'Set to Yes to enable user login using the Maxim iButton reader'.

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 iButtonSN field and click the Delete button for the previous user before assigning the button to the new user.



15.10 Magnetic Card Reader

15.10.1 Setup

Note: this help topic does not apply to Datacap NETePay users. Refer to the [HID card reader](#)^[101] help topic for setup and usage.

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 described 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](#)^[340] for easy setup instructions.
- If using a **Magtek** (stand-alone or preinstalled on ELO touchscreens), the card reader should already work with AmigoPOS

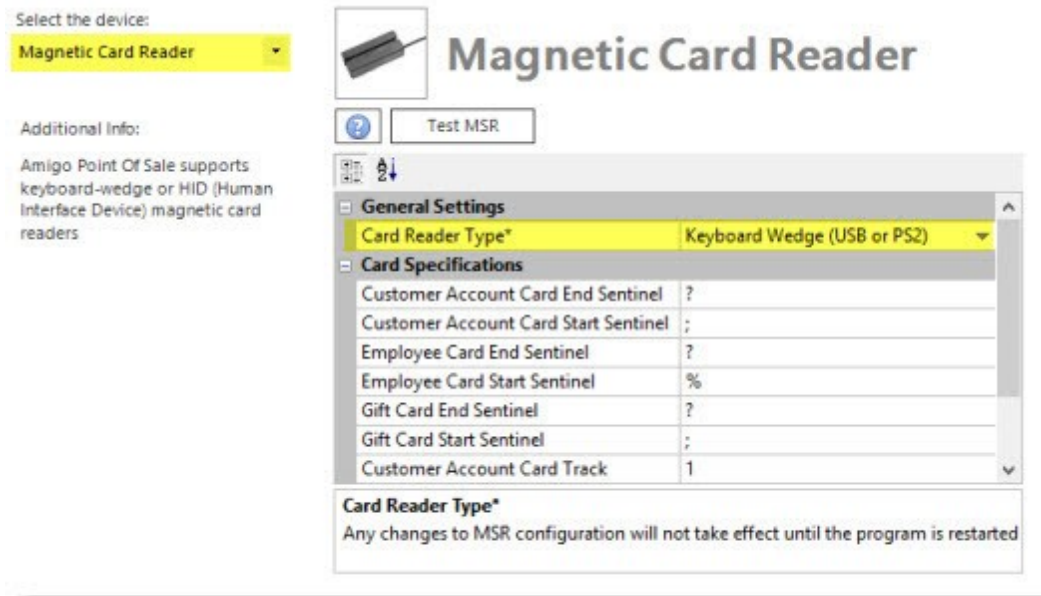
Configuring the Magnetic Card Reader

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 Windows 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.



Open Windows notepad on your pos station and ensure that word wrap is not enabled (on the top menu, select format and disable 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 "" 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](#)^[472] help topic for card encoding instructions.

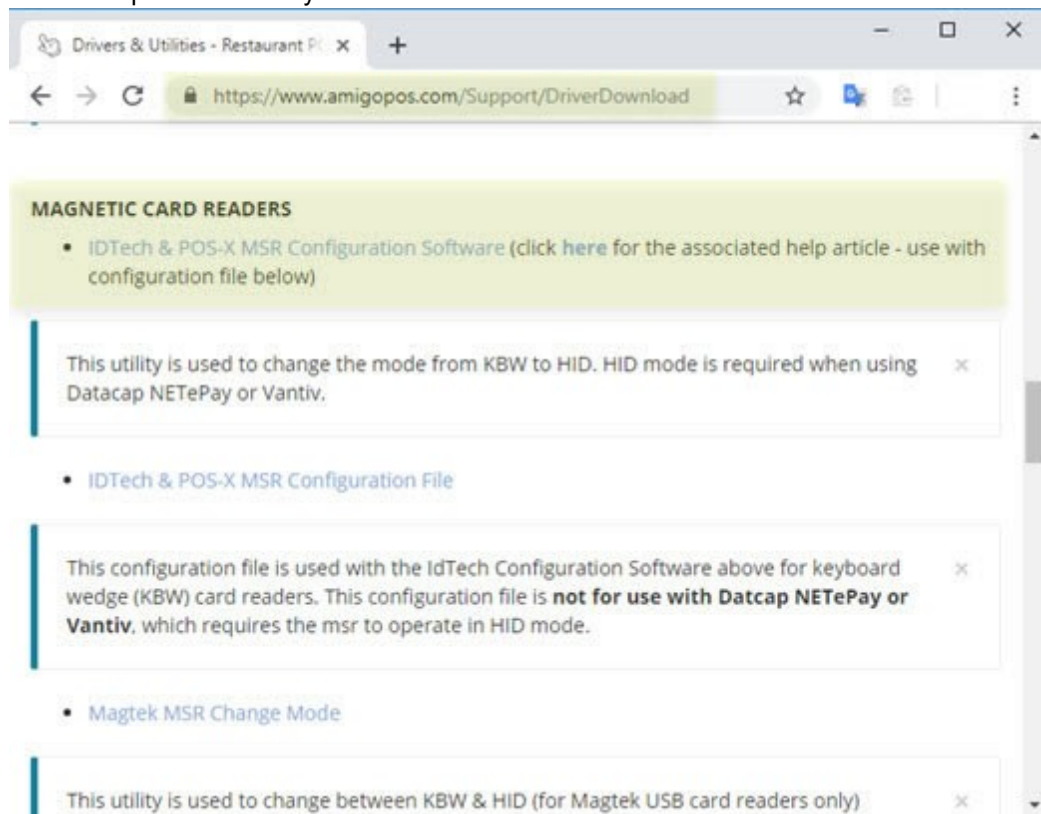
15.10.2 KBW Example: POS-X or IdTech

Note: this help topic does not apply to Datacap NETePay users. Refer to the [HID card reader](#)^[101] help topic for setup and usage.

POS-X and IdTech magnetic card readers are easy to configure using the IdTech configuration utility and configuration file available at <https://www.amigopos.com/Support/DriverDownload>. 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.

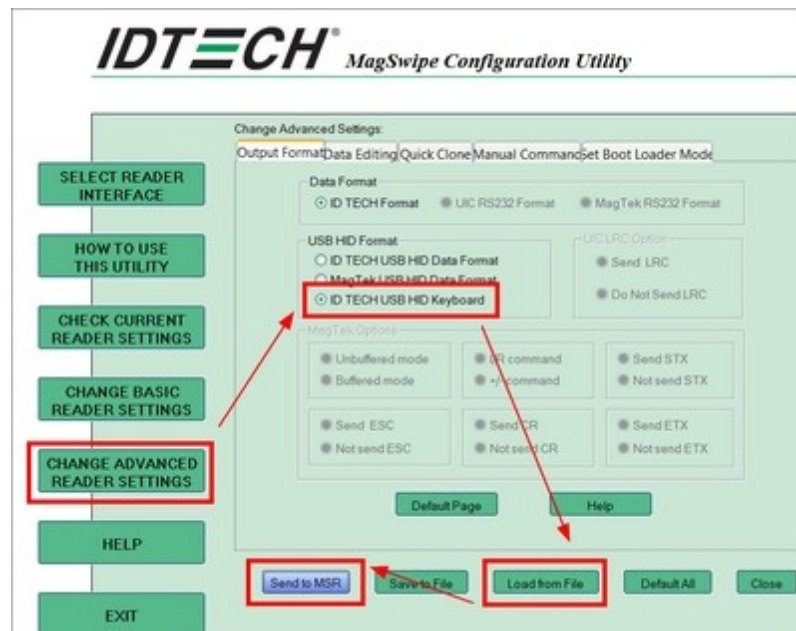
1. Download the configuration utility (IdTechMagswipeConfigurationSoftwarev2.0.15) and configuration file (IdTechMinimagPOSXm95uKBW.cfs2) from the [driver downloads](#) page at amigopos.com, saving both files to the desktop or other easily accessible folder.



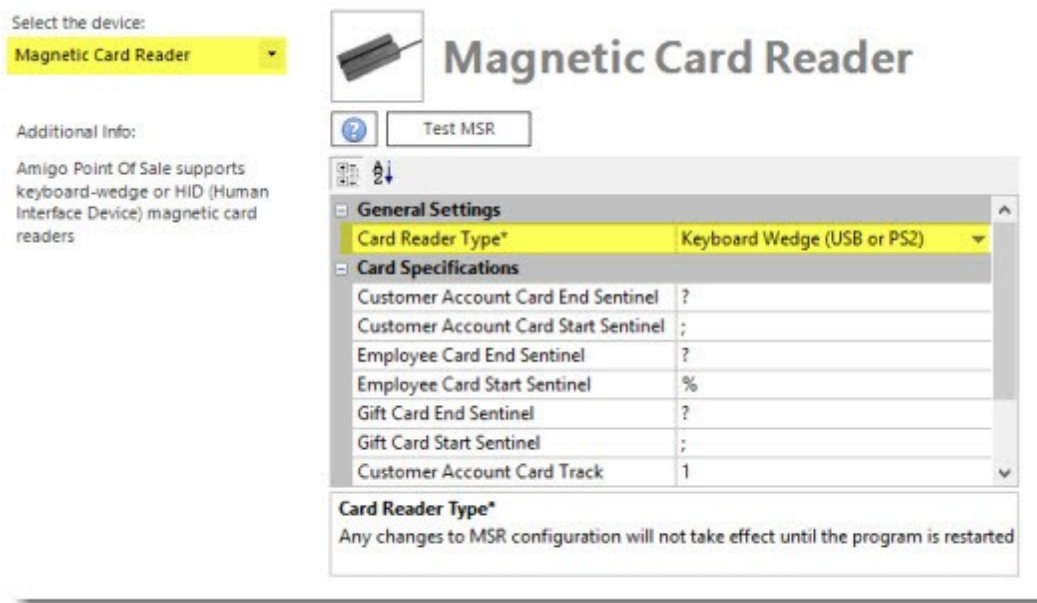
2. Run the file named **IdTechMagswipeConfigurationSoftwarev2.0.15.exe** and click the **Install** button to extract the installation files to the desktop. Open the folder named **Magswipe Configuration Software V2.0.15_Install Package** and run the file named Setup.exe to install the configuration utility (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.



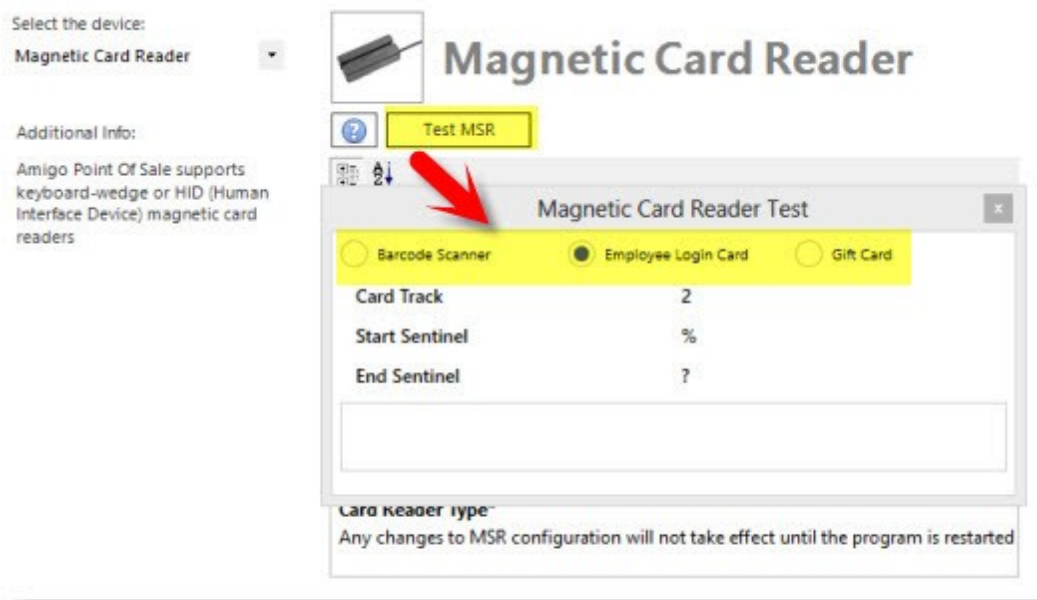
6. Click the **Change Advanced Reader Settings** button on the left. Select **IDTech USB HID Keyboard** in the USB HID Format box. Click the **Load From File** button at the bottom. Navigate to the desktop and select the previously downloaded file named `IdTechMinimagPOSXxm95uKBW.cfs2`. Click Open. Click 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.



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



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



15.10.3 HID Card Readers

AmigoPOS supports HID card readers that are compatible with the Datacap NETePay dsIPDCX component so that the same device may be used for processing credit card transactions, local gift card transactions and employee card login.

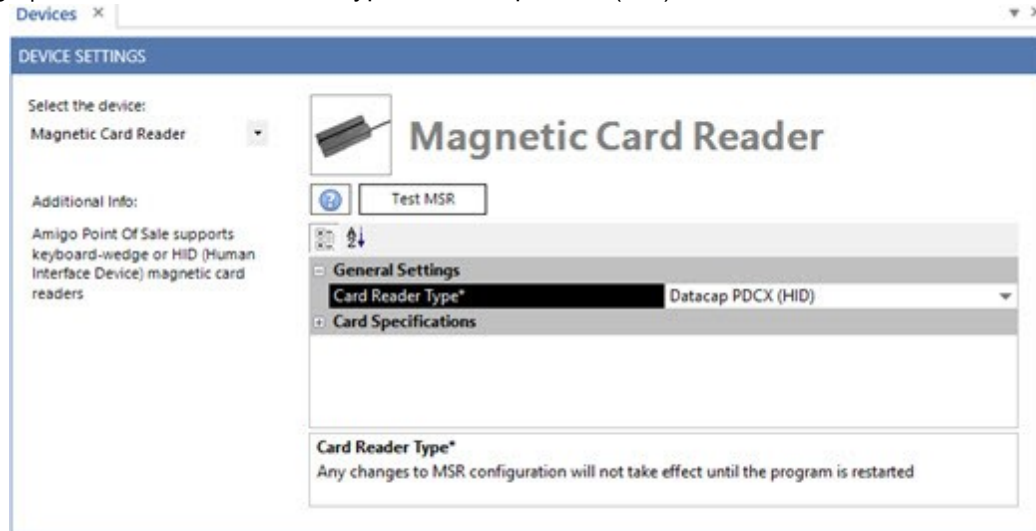
The following are the restrictions placed on gift, loyalty and employee login cards, which is most cases is compatible with the [recommended card encoding format](#)⁴⁷²:

- Only Track 2 data is returned

- If the data read appears to be a major credit card an error will be returned. The Datacap dsiPDCX component recognizes a credit card if either of the following are true:

- Starts with 2, 4, 5, or 6 and is 16 digits in length
- Starts with 3 and is 14, 15, or 16 digits in length

After [configuring the device](#) for use with NETePay, open the MSR settings screen in Back Office | Settings | Devices and set the MSR type to Datacap PDCX (HID).



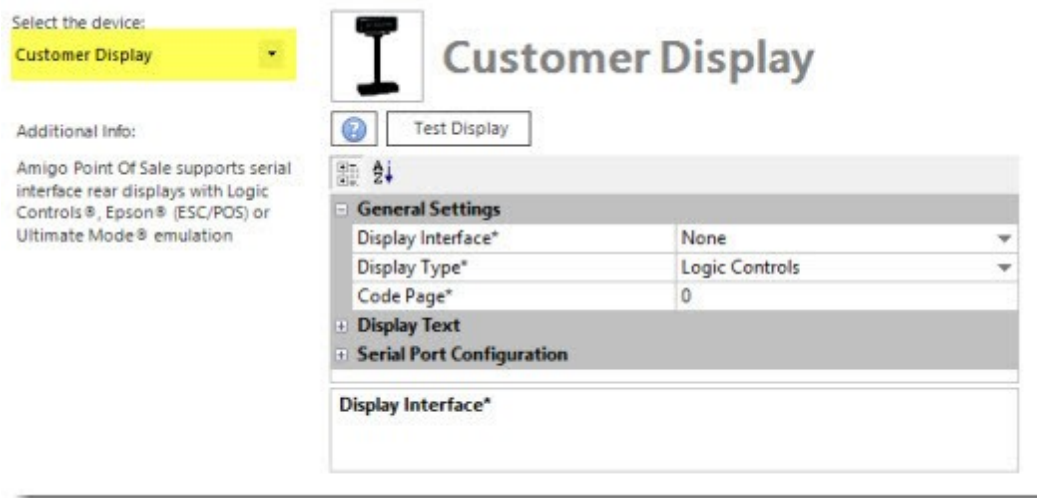
Click Test MSR to verify that the MSR is set up correctly.

15.11 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. Open Back Office | Settings | Devices 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.



15.12 Prep Printers

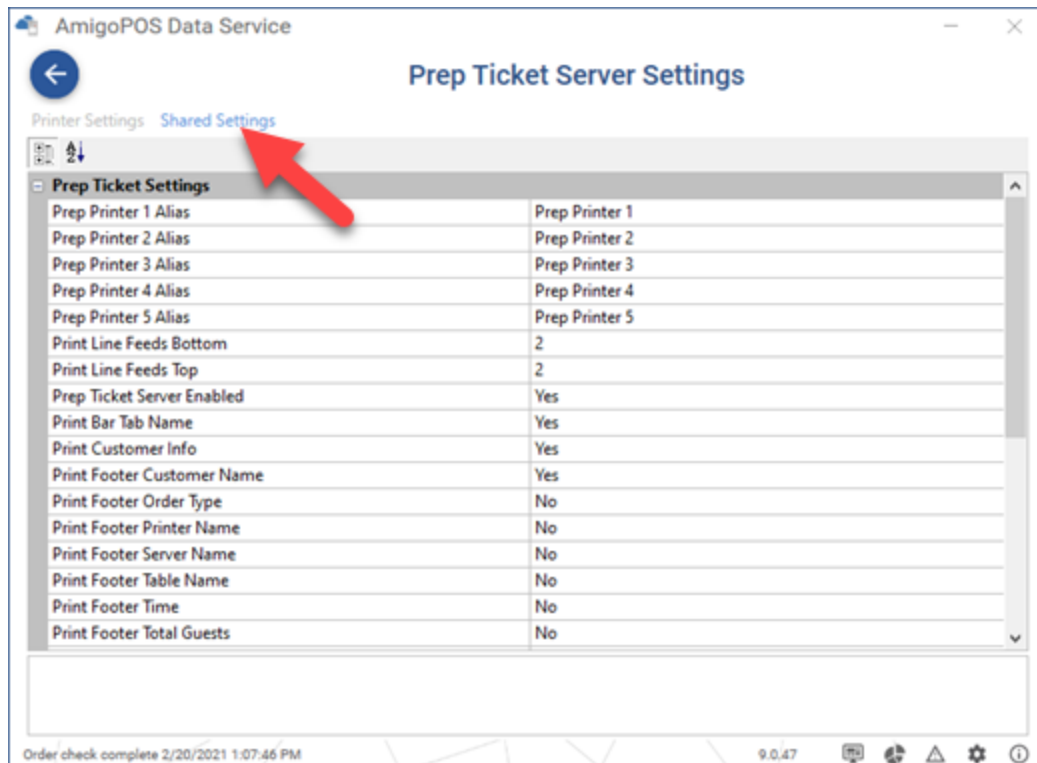
15.12.1 Prep Printer Setup

AmigoPOS can 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 Epson TM-U200 and Star SP500.

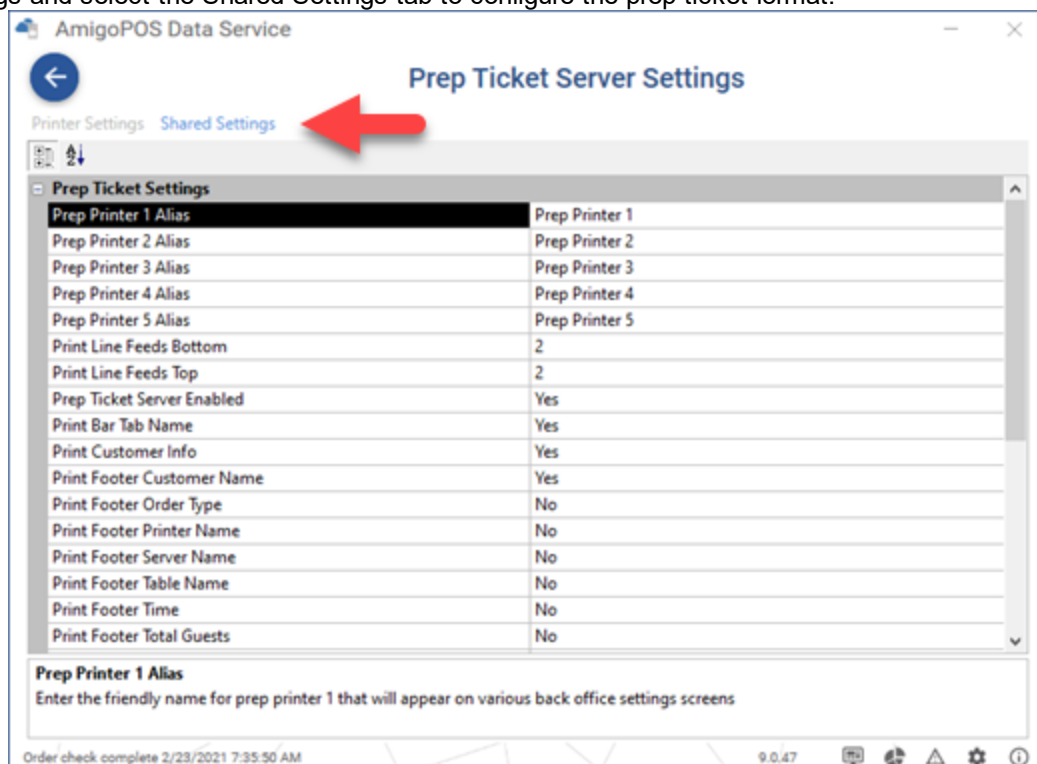
Remote printers should be connected to the network using a TCP/IP printer server. The printer can also be connected directly to the main pos station, but the TCP/IP printer server is preferred. Many remote printers are available with an internal Ethernet print server to simplify installation and eliminate 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 at the main pos station where the data service application is running, using the **Add Printer** function in the Windows Control Panel Printers and Faxes folder, as described in the [receipt printer installation](#)^[379] 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. Whenever possible use the standard **Windows Generic/Text Only driver** as described in the [receipt printer installation](#)^[379] topic.

Note: Configure a static IP address for a network (Ethernet or wireless) print server. When 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 the data service application. Click Prep Ticket Server Settings and select the Shared Settings tab to configure the prep ticket format.



The following settings are available to customize the remote prep ticket. These settings can be accessed in the data service application under the Prep Ticket Server tab. Update the pos station database or restart the pos to begin using the new settings at each pos station.

Prep Ticket Settings

- **Prep Printer Alias (1-5):** Enter a friendly name for the prep printer for easier configuration in the back office menu item editors
- **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

1 2 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.

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

1 2 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

15.12.2 Prep Ticket Format

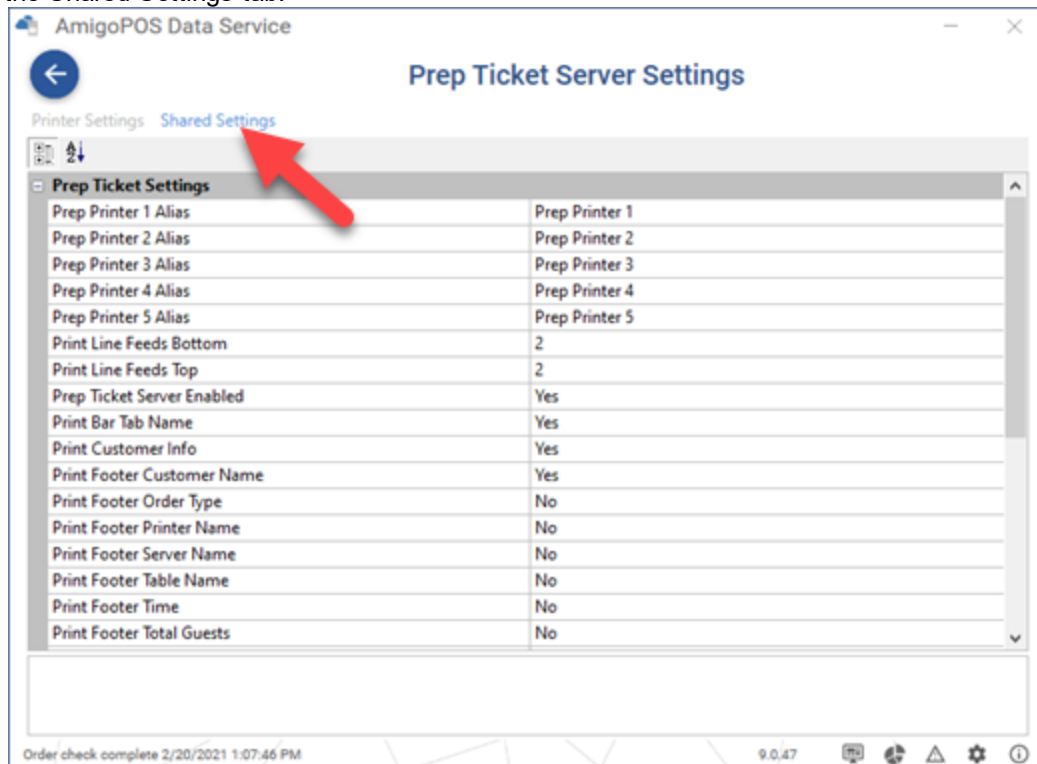
Many settings are available to customize the prep ticket. Note that not all printers are capable of every setting shown below and the prep tickets may appear different than the examples shown below. Do not enable unsupported commands, i.e. do not enable Print Menu Items Red if the printer is not capable 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](#) ³⁴⁸
- [Order-Type Specific Settings](#) ³⁵⁰
- [Dine-In Order Example](#) ³⁵⁰
- [Counter Order Example](#) ³⁵²
- [Delivery Order Example](#) ³⁵⁴
- [Testing the Prep Printer](#)

Shared Settings

The following settings are available in the data service application. Click Prep Ticket Server Settings and select the Shared Settings tab.



Prep Ticket Settings

- **Prep Printer Alias (1-5):** Enter a friendly name for the prep printer for easier configuration in the back office menu item editors
- **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**.

Order Types Settings X

Order Types Settings

Customer Receipt

Print Order Type On Top	<input checked="" type="checkbox"/>
Print Order Type On Bottom	<input checked="" type="checkbox"/>
Print 3-Digit Order Number At Bottom	<input checked="" type="checkbox"/>
Print Ticket Item Count	<input type="checkbox"/>
Auto Print Receipt	<input type="checkbox"/>

Label Printers

Order Entry

Force Beverage Selection	<input type="checkbox"/>
Use Exact Change For Cash	<input type="checkbox"/>
Stay On Order Entry Screen	<input checked="" type="checkbox"/>
Show Seating Chart	<input type="checkbox"/>
Guest Assignment Enabled	<input type="checkbox"/>
Enter Number Of Guests	<input type="checkbox"/>
Show Customer Info	<input type="checkbox"/>
Show Delivery Zones	<input type="checkbox"/>
Show Phone Number	<input type="checkbox"/>
Show Customer Name Prompt	<input checked="" type="checkbox"/>

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

- **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

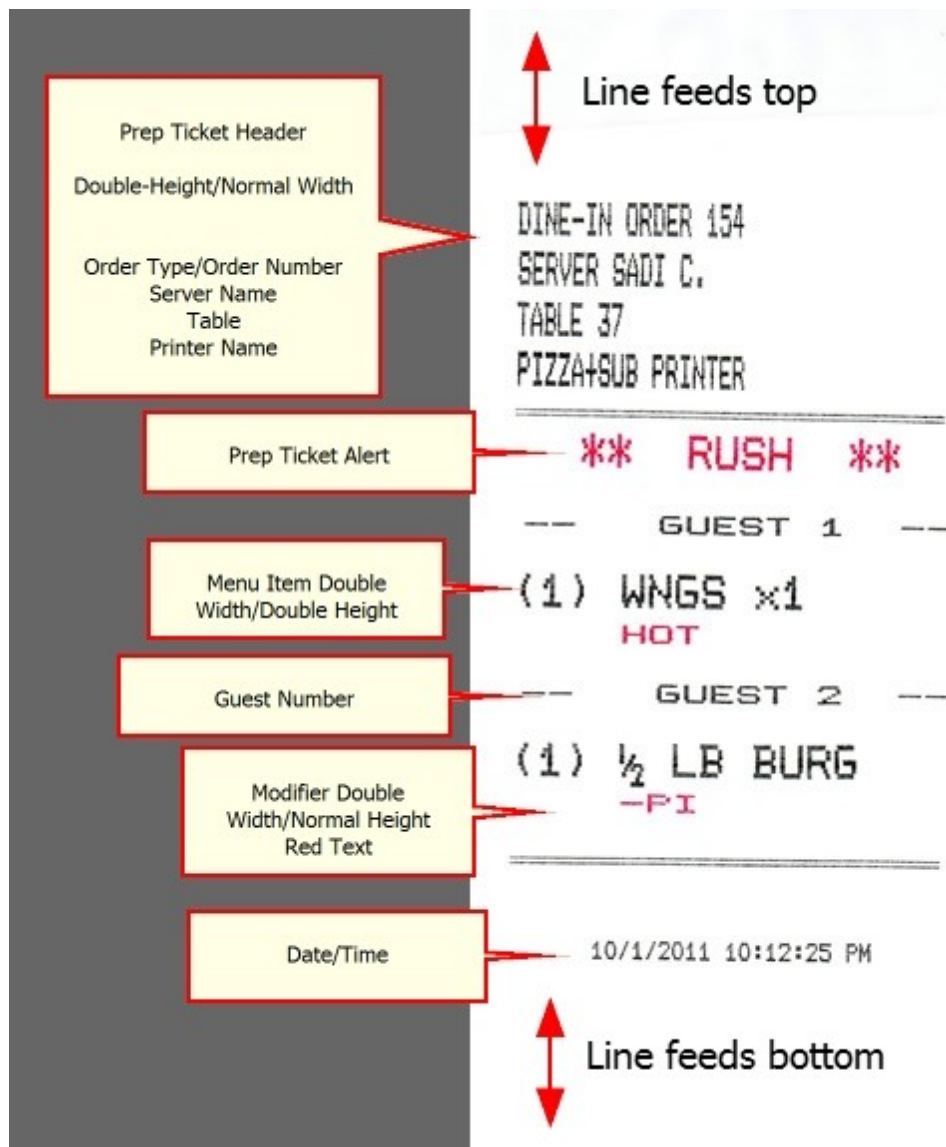
Examples

Dine-In Order

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



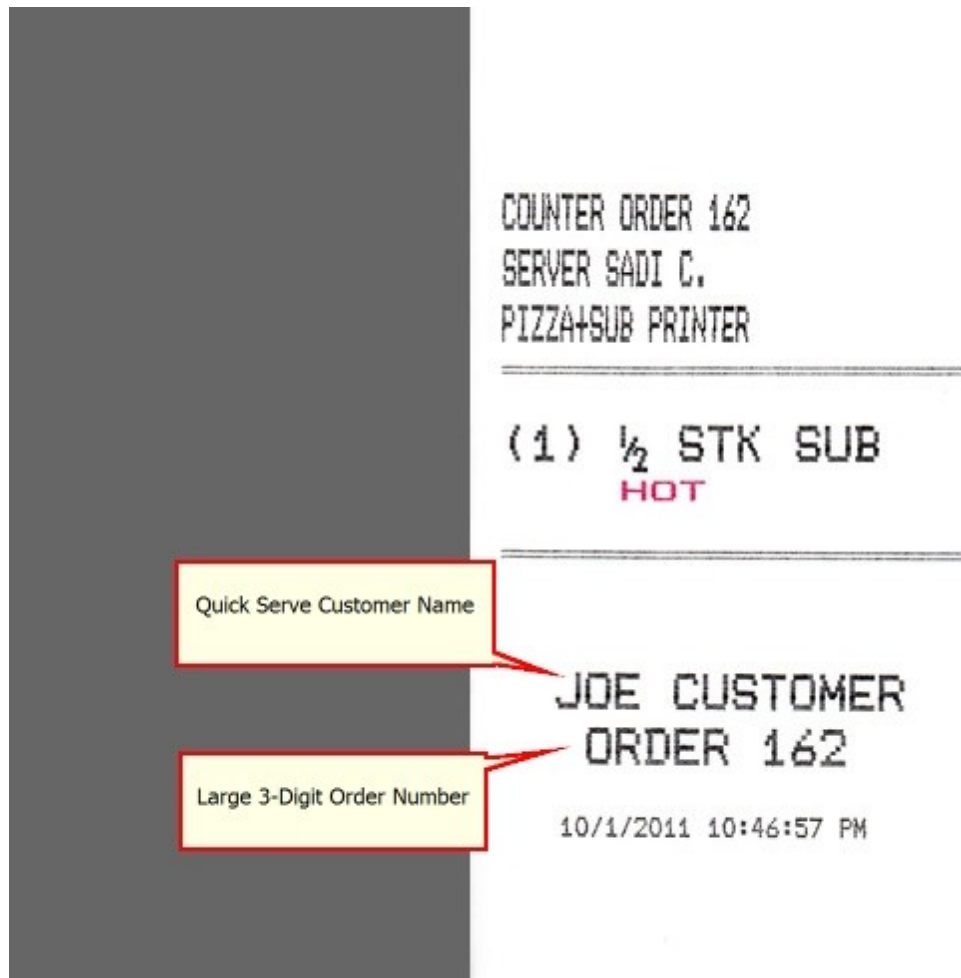
The prep ticket displays each customer's order separately with the prep ticket alert in red after the prep ticket header. Prep ticket header uses double-height/regular width characters, menu items use double-height/double width, modifiers use regular height/double-width and time is printed at the bottom.

**Counter Order**

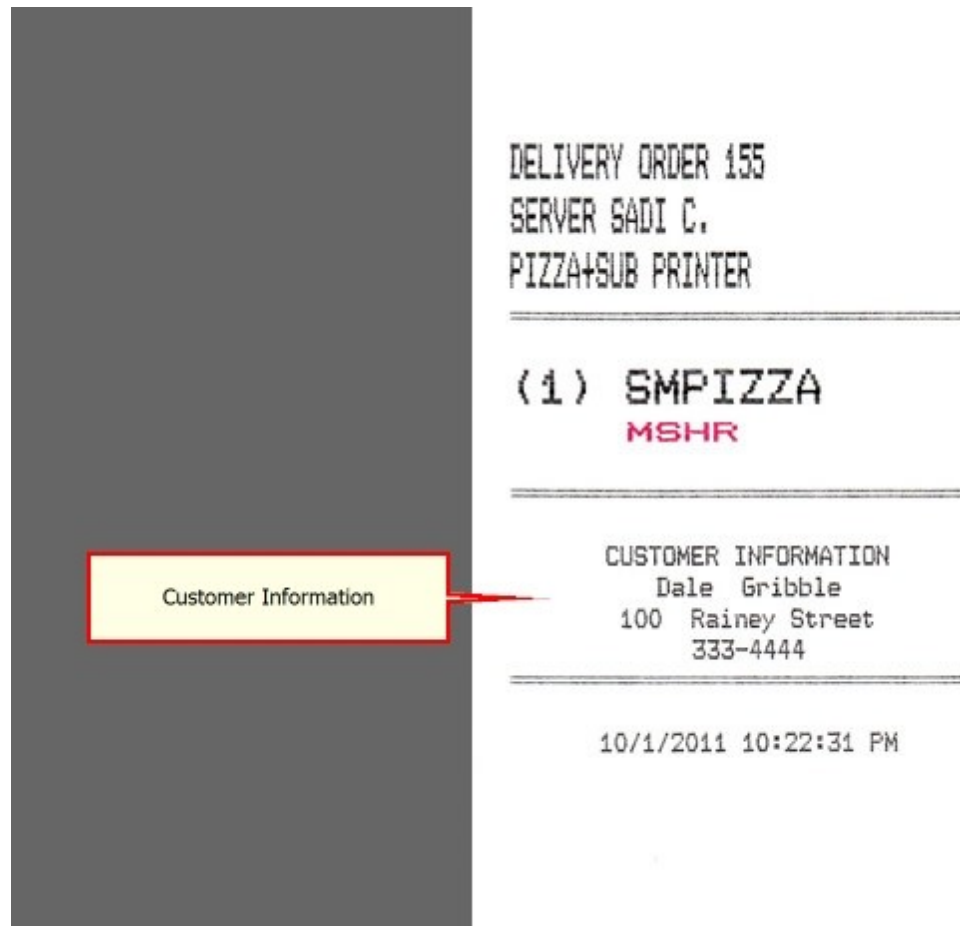
The customer name prompt appears for order types with Show Customer Name Prompt enabled. The name will print at the bottom of the prep ticket.

The screenshot displays the AmigoPOS 9 interface. At the top, the header bar shows "My Restaurant" on the left, the date and time "2/20/2021 1:12 PM" in the center, and a series of icons (pencil, palette, database, minus, folder, and close) on the right. Below the header is a light blue bar with the text "ENTER THE CUSTOMER NAME". Underneath this is a large white rectangular input field containing the text "TEST CUSTOMER". Below the input field is a virtual keyboard with a grid of buttons. The buttons are arranged in four rows: the first row contains numbers 1-0, hyphen, and at-sign; the second row contains letters Q-P, asterisk, and at-sign; the third row contains letters A-L, percent, and apostrophe; the fourth row contains letters Z-M, greater-than, period, and a yellow triangle. At the bottom of the keyboard area are three buttons: a red "CANCEL" button, a grey rectangular button, and a green button with a white right-pointing arrow.

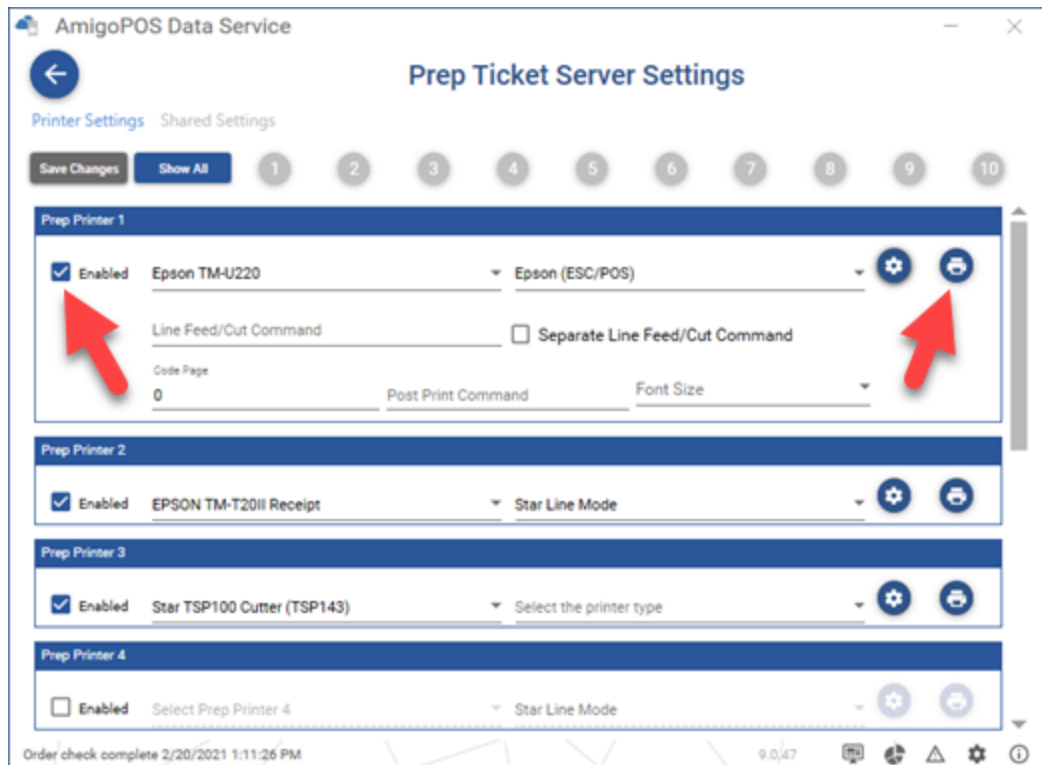
The example counter order prep ticket shown below displays both the customer name and the 3-digit order number at the bottom. Prep ticket header uses double-height/regular width characters, menu items use double-height/double width, modifiers use regular height/double-width and time is printed at the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

**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.

**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.



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

BAR ORDER 1234
SERVER SADI C.
BAR TAB FOR MARY

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

10/2/2011 1:06:26 PM

BAR ORDER 1234
SERVER SADI C.
BAR TAB FOR MARY

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

10/2/2011 1:09:49 PM

BAR ORDER 1234
SERVER SADI C.
BAR TAB FOR MARY

==
** RUSH ORDER **

(1) DEMO VERSION
DEMO VERSION
==

10/2/2011 1:08:44 PM

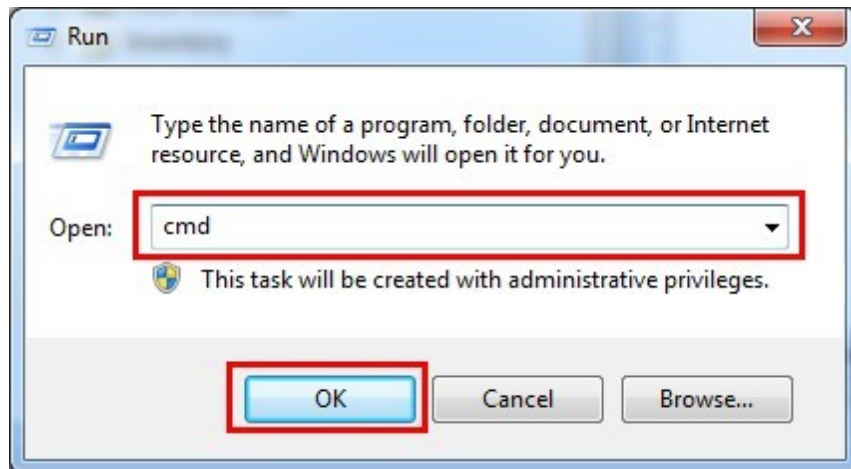
15.12.3 Print Servers

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 the main pos station on the local network.

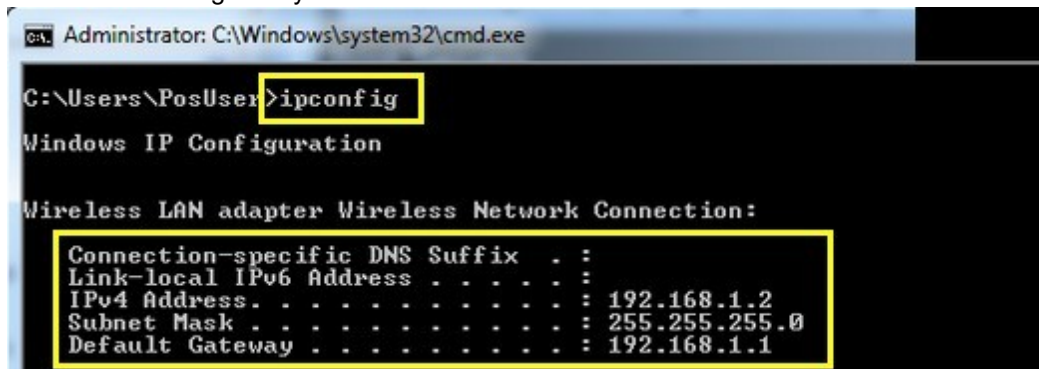
The following procedure describes the common scenario of an Epson TM-U220 impact printer attached to an inexpensive Netgear PS101 mini print server that is wired to a Netgear router with Windows 7 installed at the main pos station. The steps are virtually identical for any wired or wireless print server or router using Windows 7/8.1/10. The following steps must be repeated at the main pos station where the data service application is running for each prep printer.



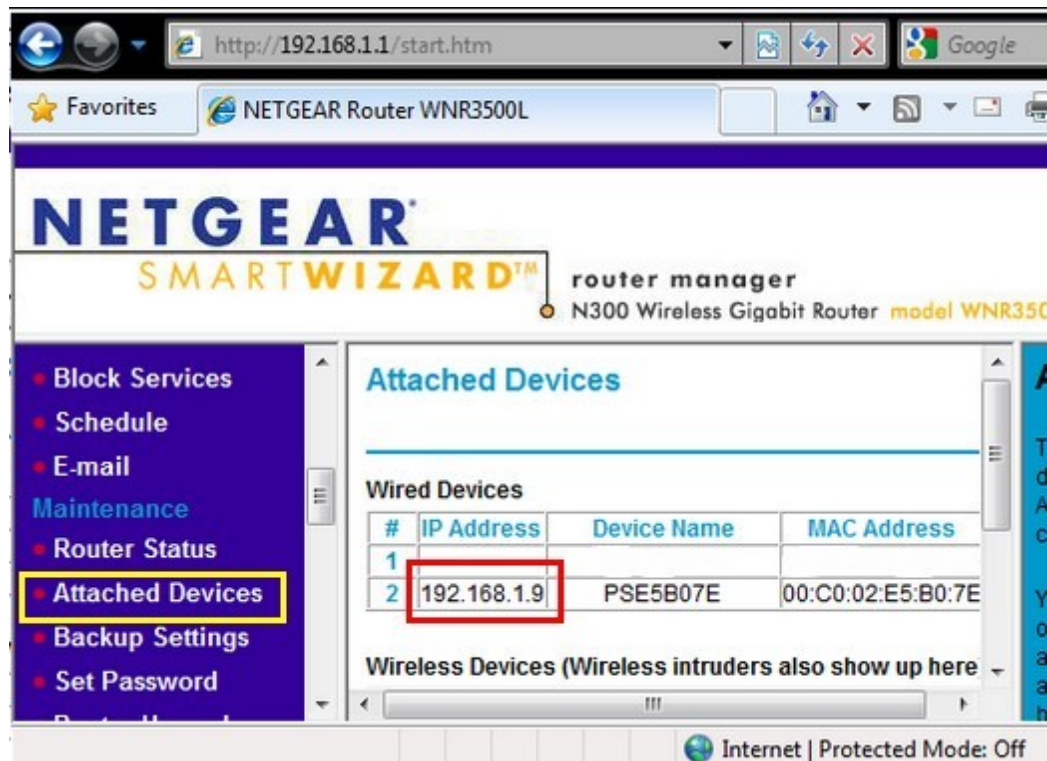
First determine the print server's IP address. In order to find the print server's IP address, open a web browser at the main pos station and enter the router's IP address. If the router's IP address is not known, click **Windows Start/Run**, type **cmd** (or enter cmd in the *Search programs and files*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



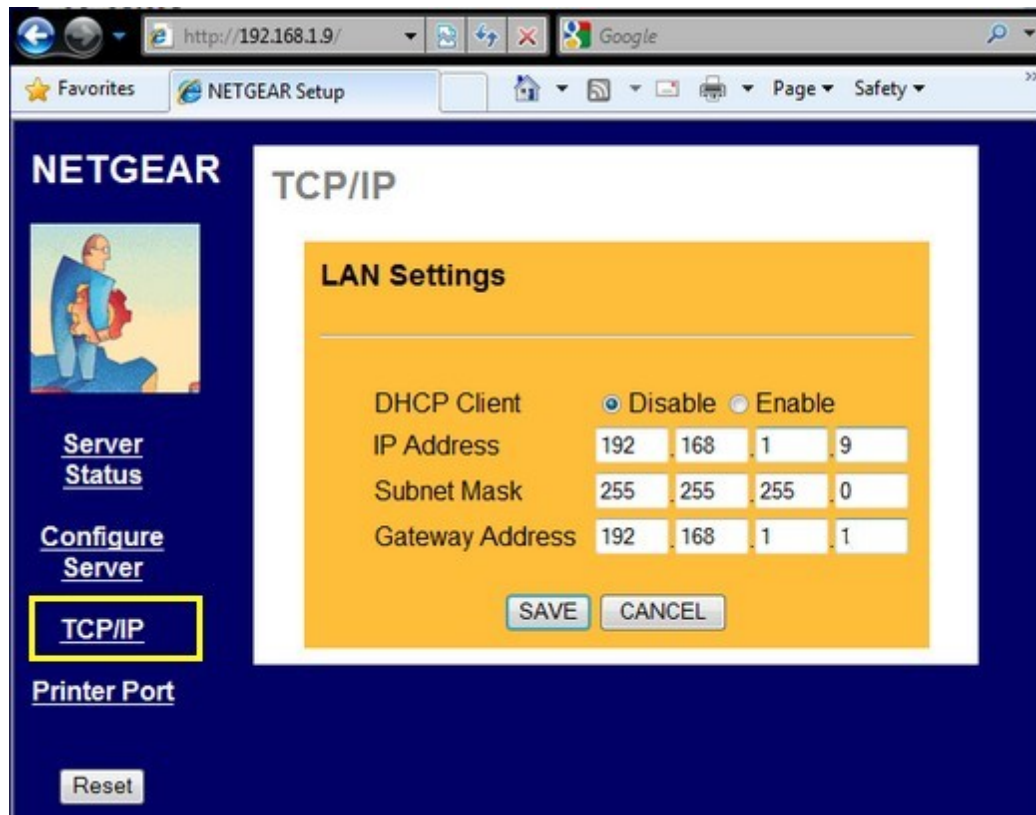
At the prompt, enter **ipconfig** and press Enter to display the current network configuration. The router's IP address is the default gateway.



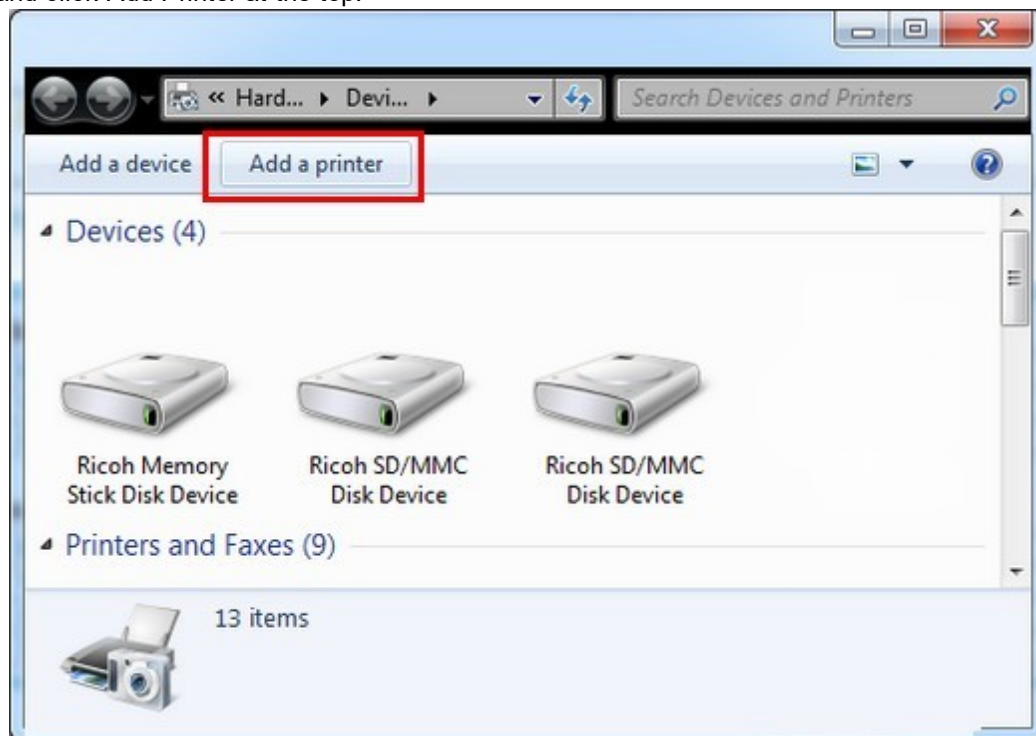
Open a web browser and enter the default gateway in the address bar to connect to the router. Click the **Attached Devices** link to view the IP address for each pc and other device connected to the router. This link may have other names for different routers; i.e. on Belkin routers it may be referred 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.



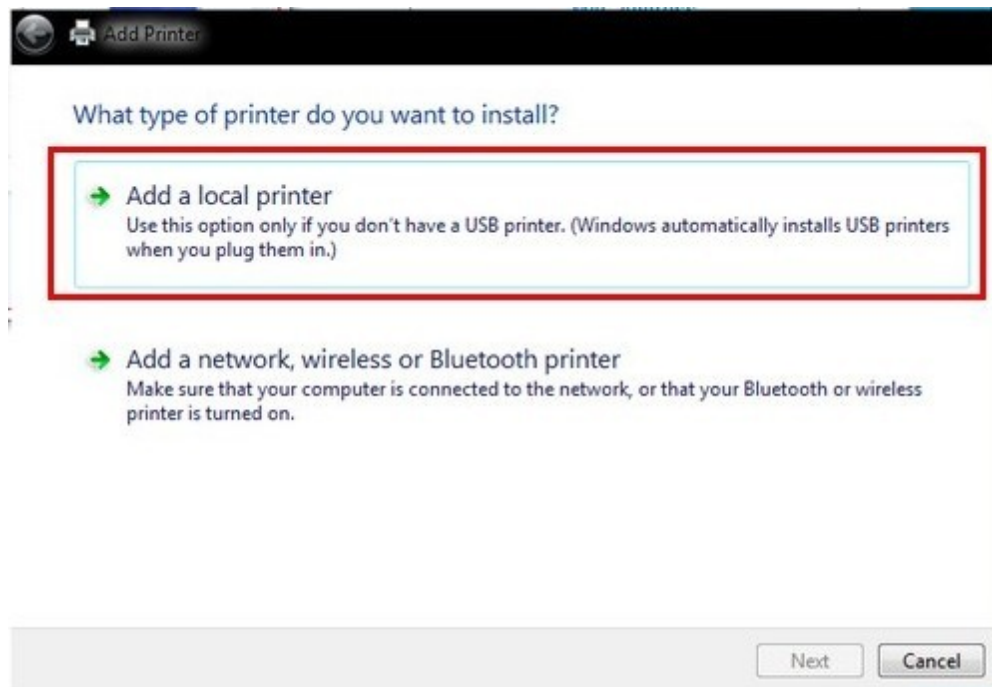
Enter the print server's IP address in the browser's address bar to connect to the print server. Set the print server to use a static IP address so that the IP address does not change if the router is powered off or reset. In the example shown below, DHCP is disabled and the IP address is manually entered 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.



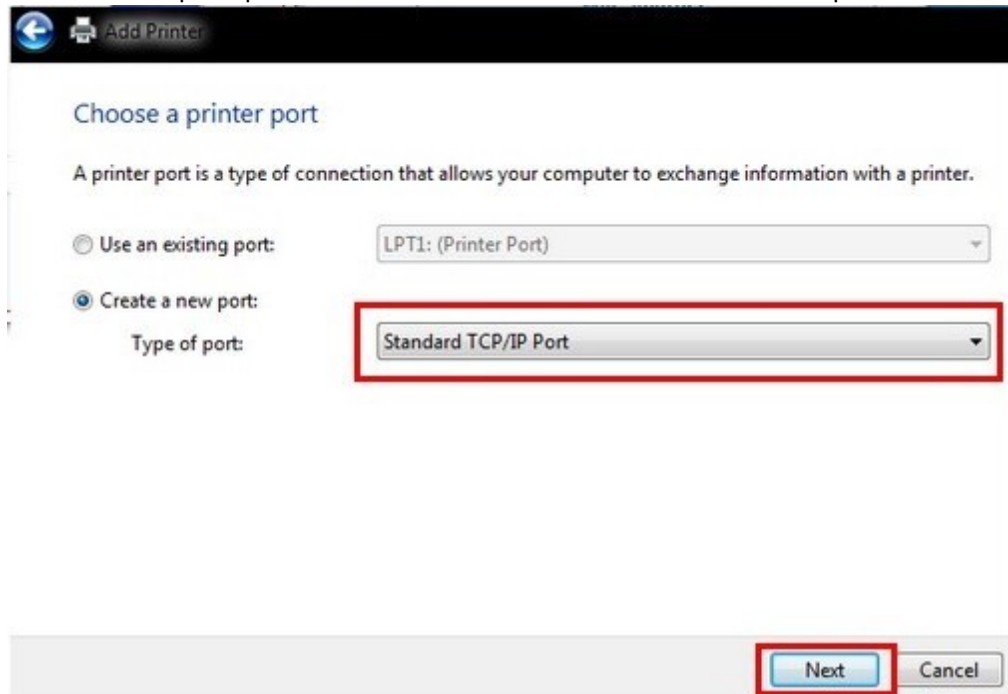
Now Windows is able to communicate with the print server on the network. To install the printer at the main pos station where the data service application is running, open the Windows Devices and Printers folder and click Add Printer at the top.



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



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



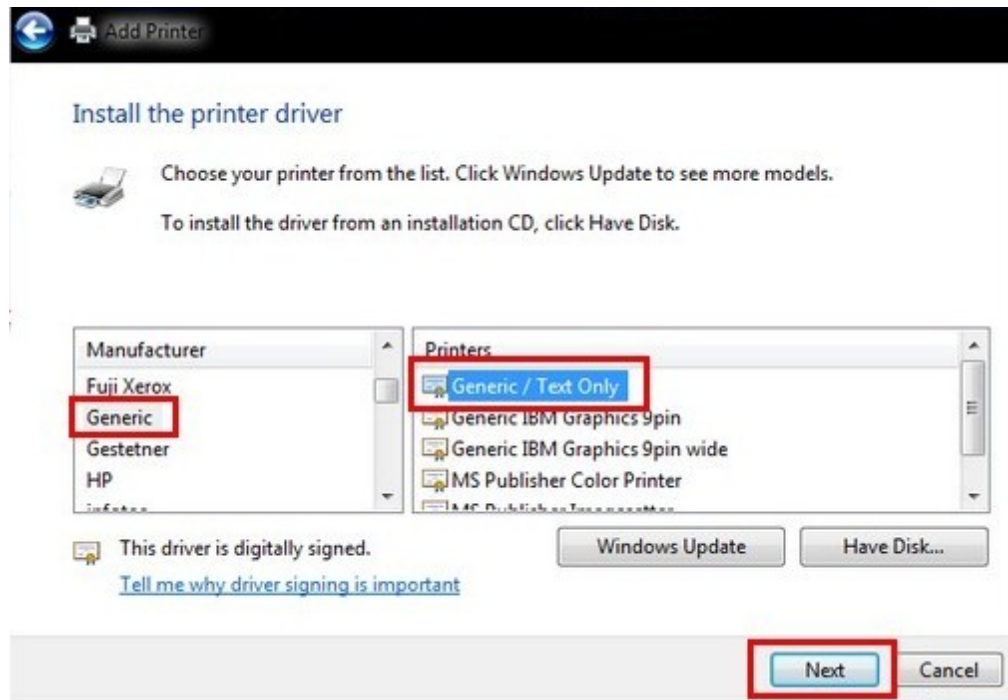
Enter the print server's static IP address and un-check the box next to Query the printer and automatically select the driver to use. The default port name can be used. Click Next.

The screenshot shows the 'Add Printer' wizard in Windows. The title bar says 'Add Printer'. The main heading is '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 value '192.168.1.9', and 'Port name' with the value '192.168.1.9'. Below these fields is a checkbox labeled 'Query the printer and automatically select the driver to use'. At the bottom right, there are 'Next' and 'Cancel' buttons.

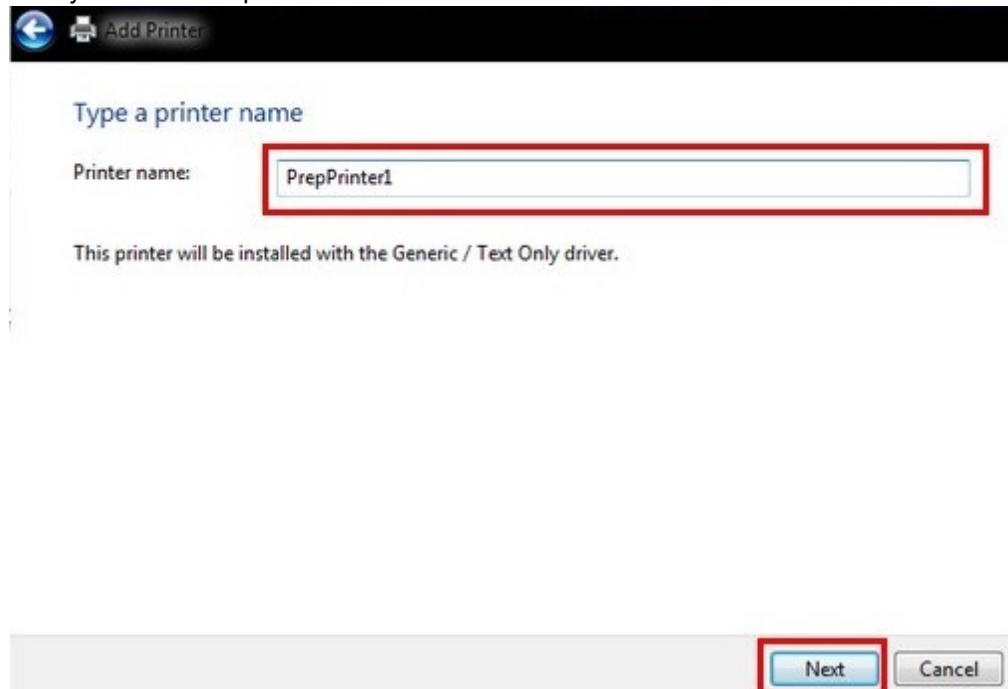
Windows will not recognize the print server and the standard device type is set to Generic Network Card. Click Next.

The screenshot shows the second step of the 'Add Printer' wizard, titled 'Additional port information required'. It contains a message: 'The detected device is of unknown type. Be sure that: 1. The device is properly configured. 2. The address on the previous page is correct. Either correct the address and perform another search on the network by returning to the previous wizard page or select the device type if you are sure the address is correct.' Below this message is a 'Device Type' section with two radio buttons: 'Standard' (selected) and 'Custom'. The 'Standard' radio button is selected, and the 'Generic Network Card' is shown in the dropdown menu. There is a 'Settings...' button next to the 'Custom' radio button. At the bottom right, there are 'Next' and 'Cancel' buttons.

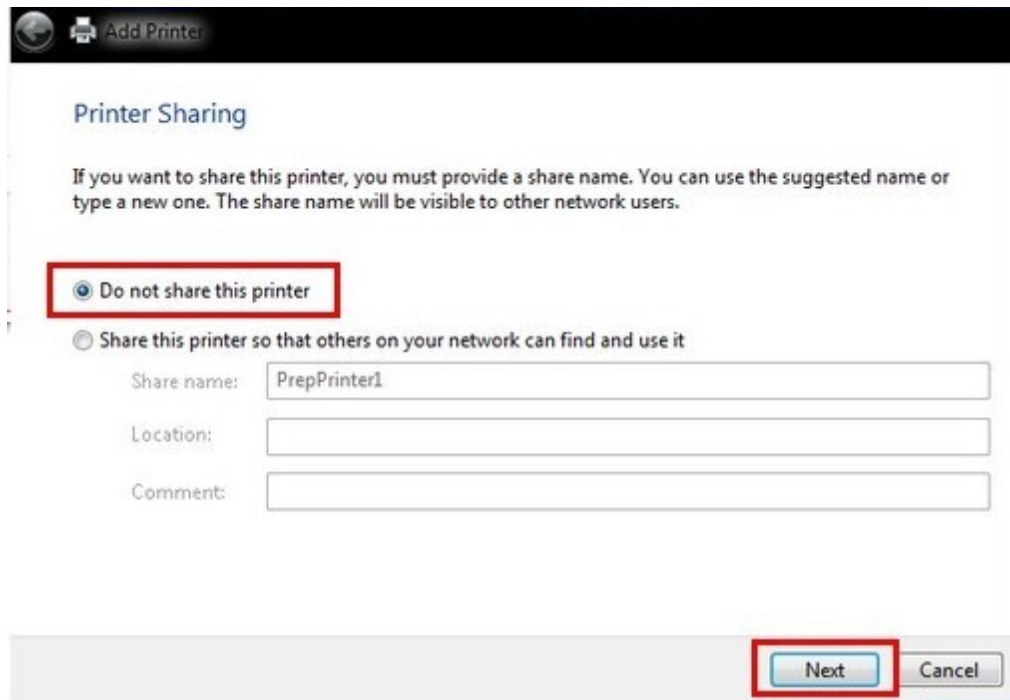
AmigoPOS will communicate with the printer using the printer's native command set so that a manufacturer driver is not required. Select the Generic/Text Only driver and click Next.



Enter a friendly name for the printer and click Next.

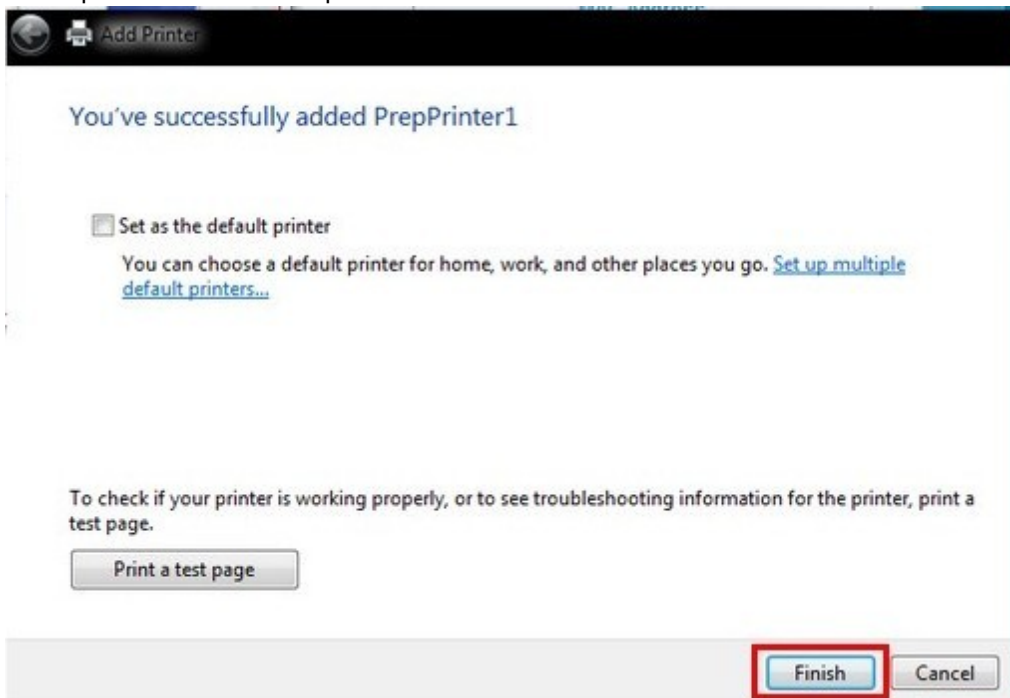


Disable printer sharing so that the other pos stations do not attempt to connect to the shared printer. Click Next.



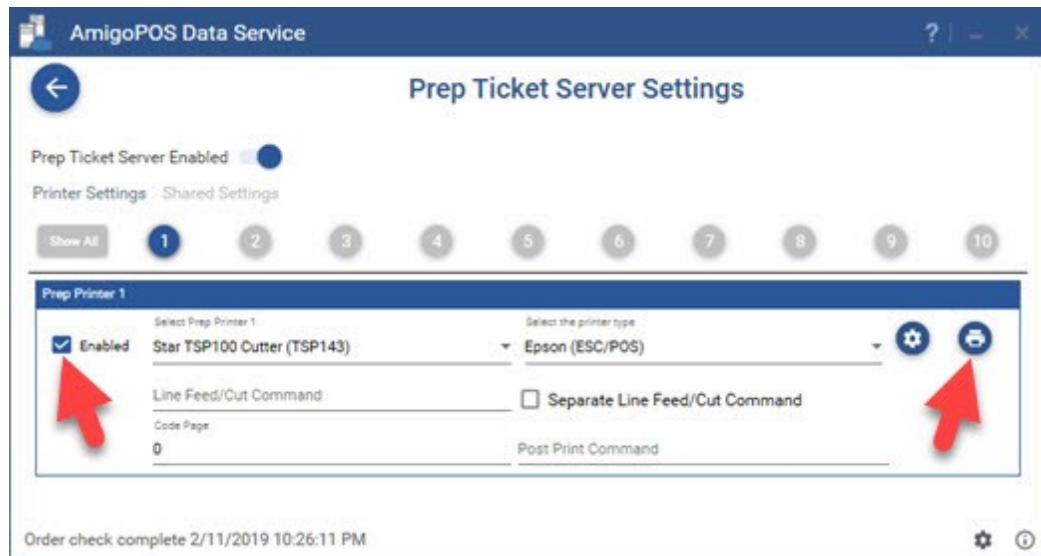
The screenshot shows the 'Add Printer' wizard in Windows, specifically the 'Printer Sharing' step. The title bar reads 'Add Printer'. The main heading is 'Printer Sharing'. Below it, a message states: 'If you want to share this printer, you must provide a share name. You can use the suggested name or 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 are three text input fields: 'Share name:' with the value 'PrepPrinter1', 'Location:', and 'Comment:'. At the bottom right, there are two buttons: 'Next' and 'Cancel'. The 'Next' button is highlighted with a red rectangle.

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



The screenshot shows the 'Add Printer' wizard in Windows, specifically the 'You've successfully added PrepPrinter1' step. The title bar reads 'Add Printer'. The main heading is 'You've successfully added PrepPrinter1'. Below it, there is a checkbox labeled 'Set as the default printer' which is unchecked. A message follows: 'You can choose a default printer for home, work, and other places you go. [Set up multiple default printers...](#)'. Below this is a button labeled 'Print a test page'. At the bottom right, there are two buttons: 'Finish' and 'Cancel'. The 'Finish' button is highlighted with a red rectangle.

Open the data service application, enable the prep printer 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. Repeat the process for each additional prep printer.



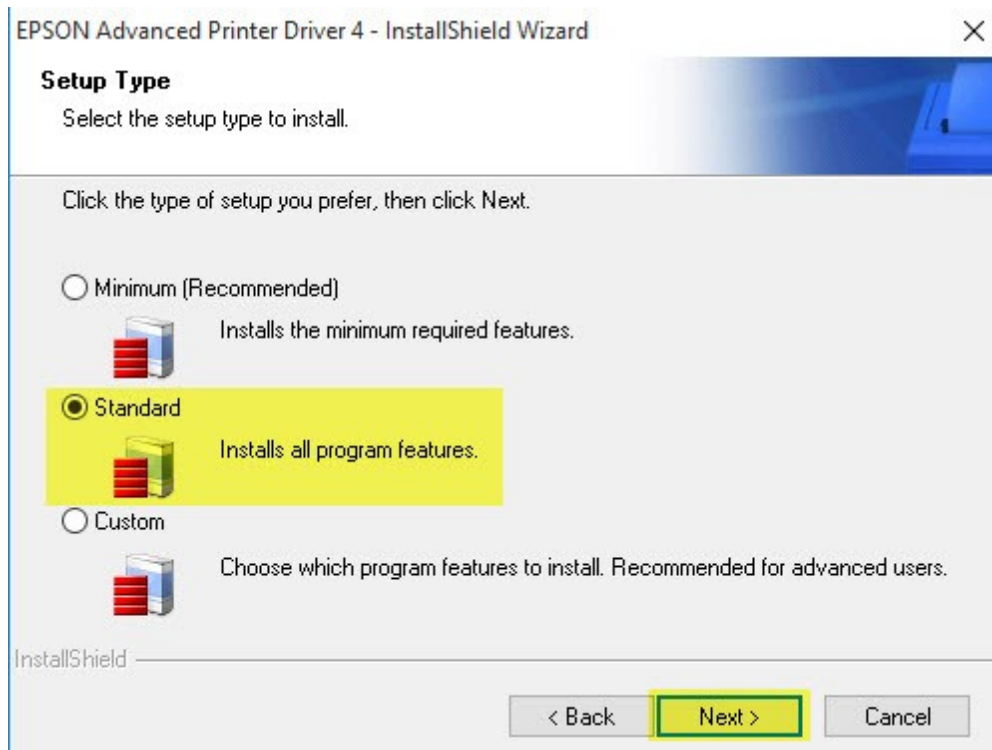
15.13 Receipt Printer

15.13.1 Installation

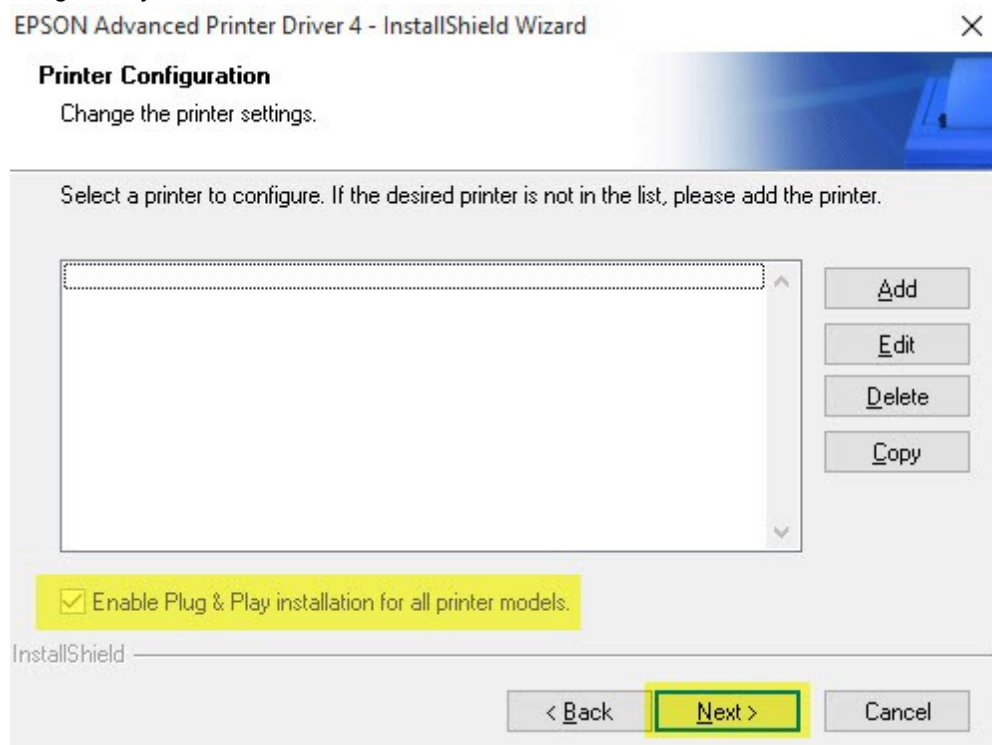
15.13.1.1 Epson TM-T88 USB

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.

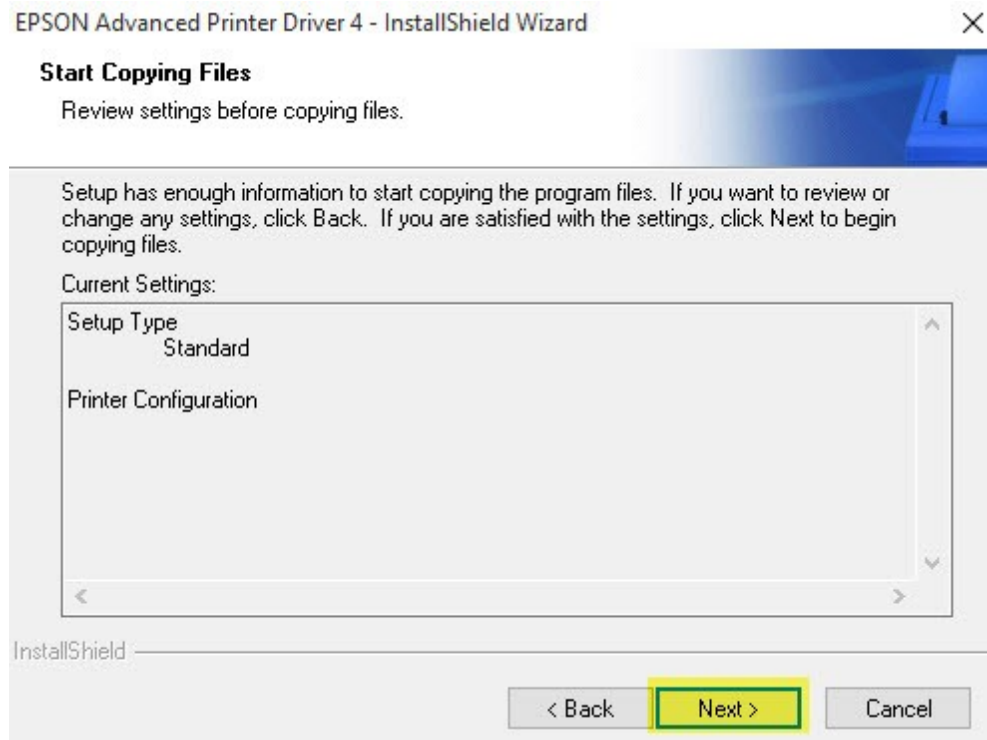
1. Disconnect the printer from the pos station
2. Download and unzip the driver installation package from <http://www.epsonexpert.com>. Run the file named APD_456E.exe. Choose Standard installation when prompted.



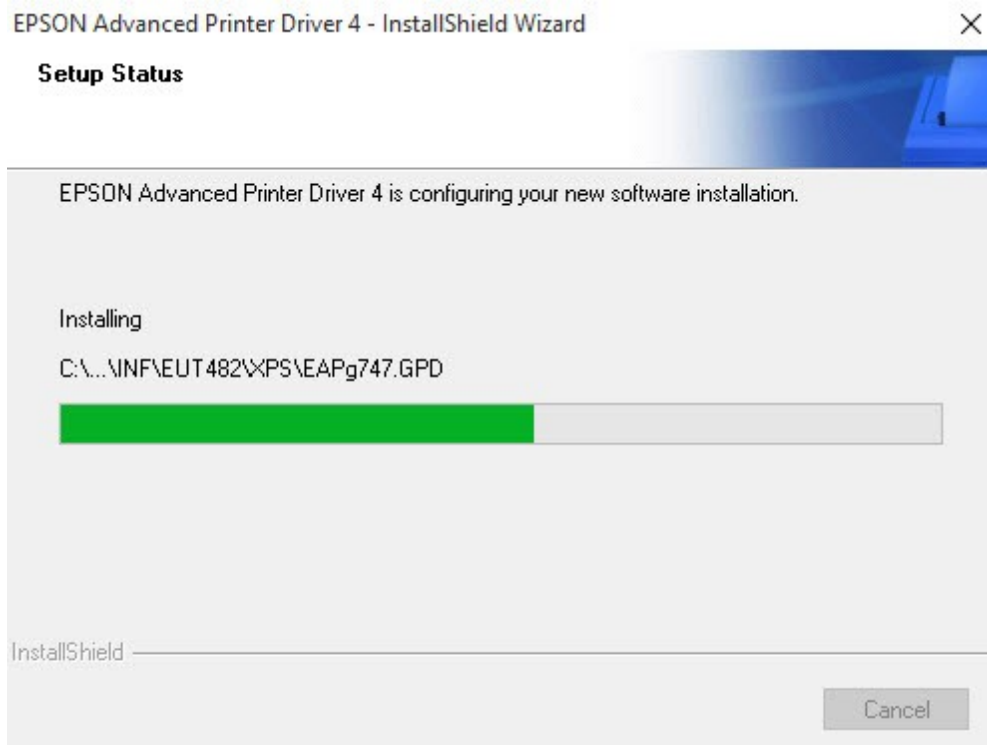
3. Click **Next** on the Printer Configuration screen. The printer will be automatically configured later using Windows Plug & Play.



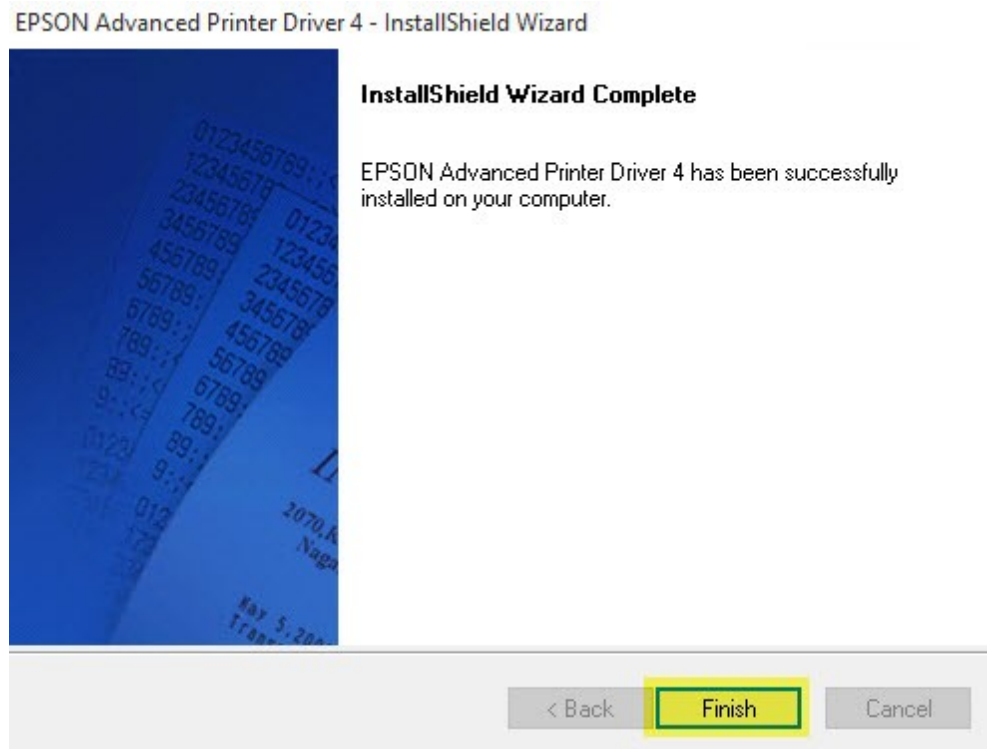
4. Click **Next** to begin the installation.



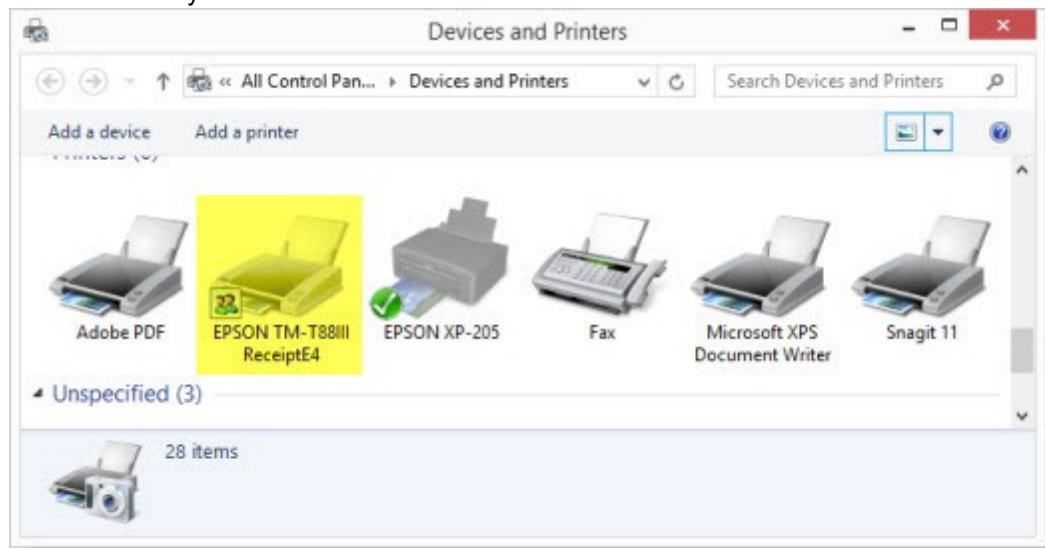
5. The installation will take approximately 5 minutes. Do not interrupt the process or use other programs while the installer is running.



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




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.







8. In AmigoPOS, navigate to Back Office | Settings | Devices 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.

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

15.13.1.2 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.

1. Download and run the installer from <https://download.epson-biz.com/modules/pos/index.php?page=prod&pcat=3&pid=37>

EPSON POS DISCPRODUCER DOT MATRIX COLORWORKS
 DOWNLOAD TECH.REFERENCE TM-INTELLIGENT

Members and Epson Partners ID 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

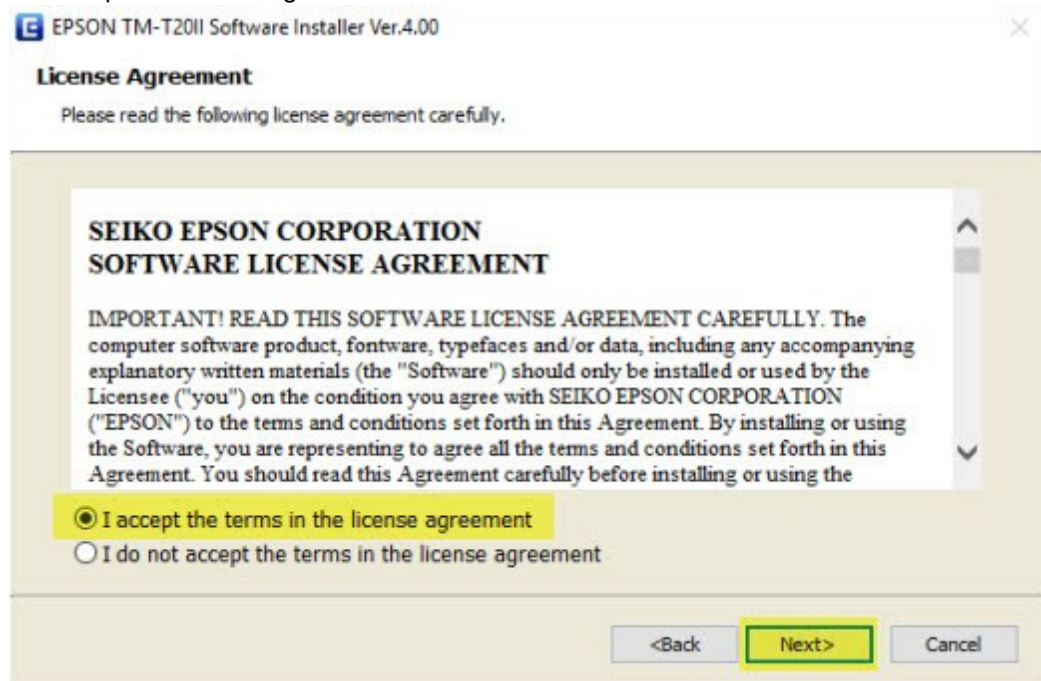
- Patch program for privilege escalation vulnerability of EPSON Network Utility Ver.1.0.1.0 **Download page**
- EPSON Advanced Printer Driver for TM-T20 Ver.5.04E** **Download page**
- EPSON Advanced Printer Driver (for English model) Ver.4.56E **Download page**
- EPSON Advanced Printer Driver Delete Temp Tool Ver.1.00 **Download page**
- EPSON Advanced Printer Driver Update Tool **Download page**

Linux Printer Driver

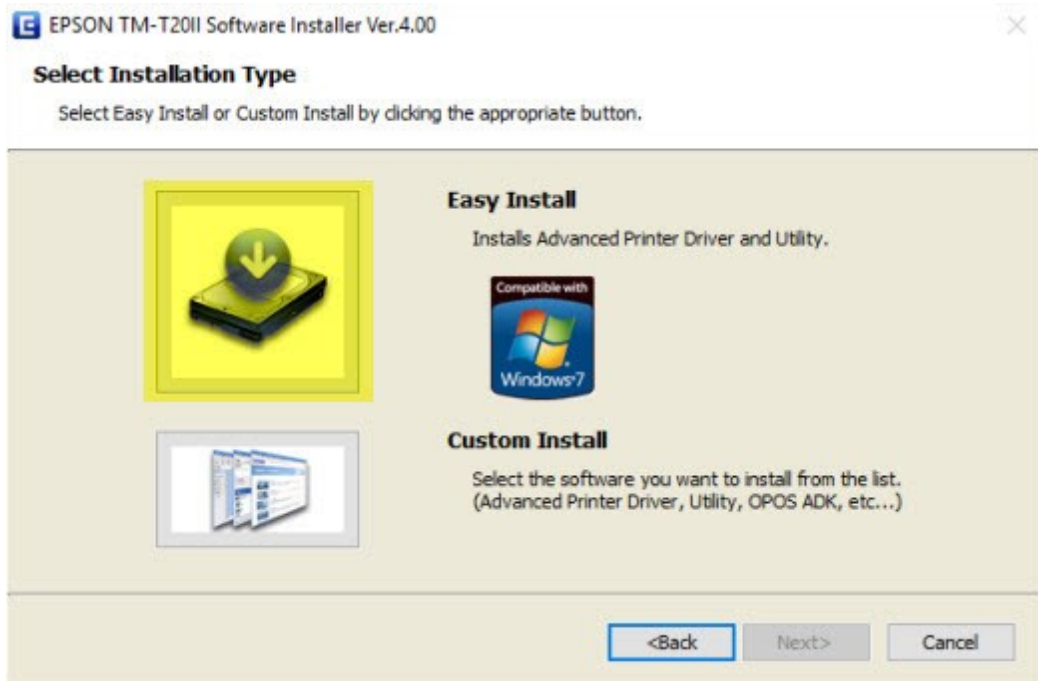
2. Click **Install Now**.



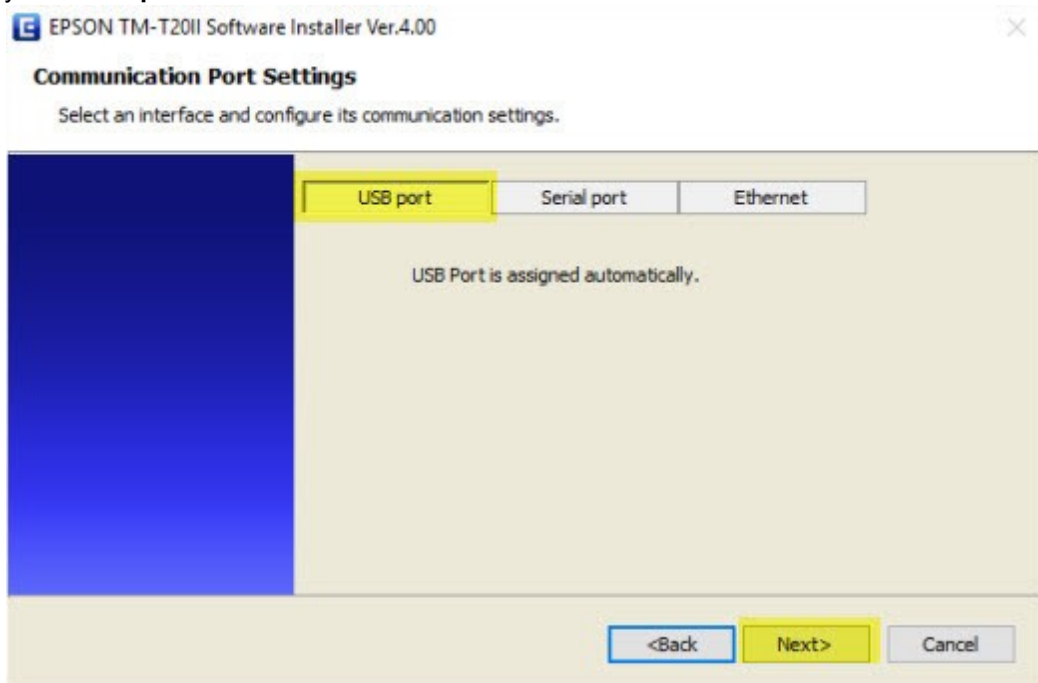
3. Read & accept the license agreement and click **Next** to continue.



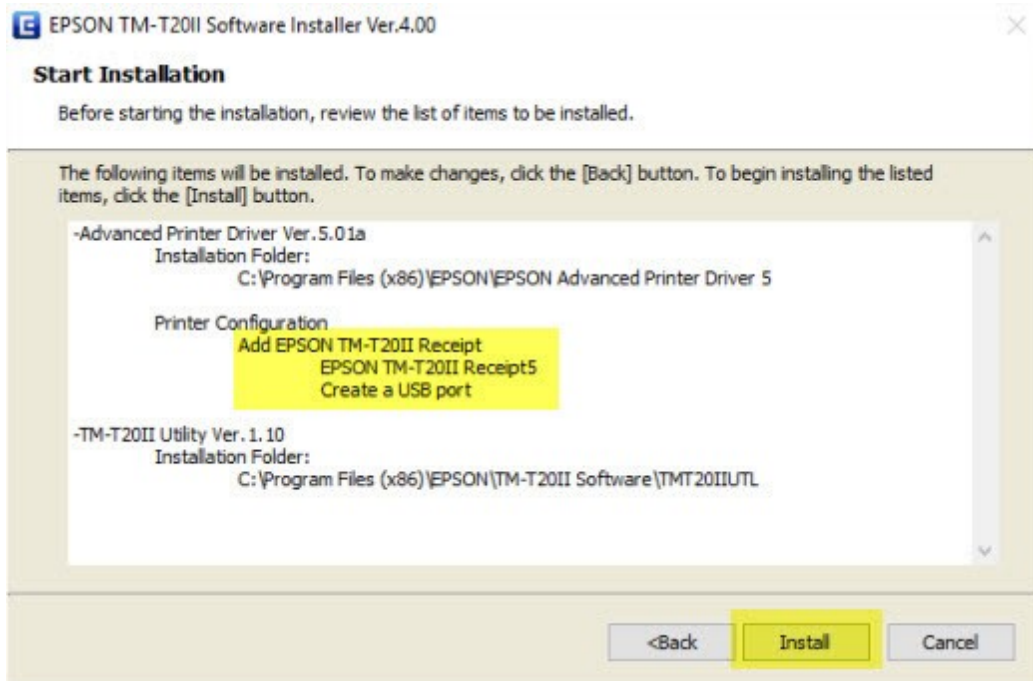
4. Select **Easy Install**.



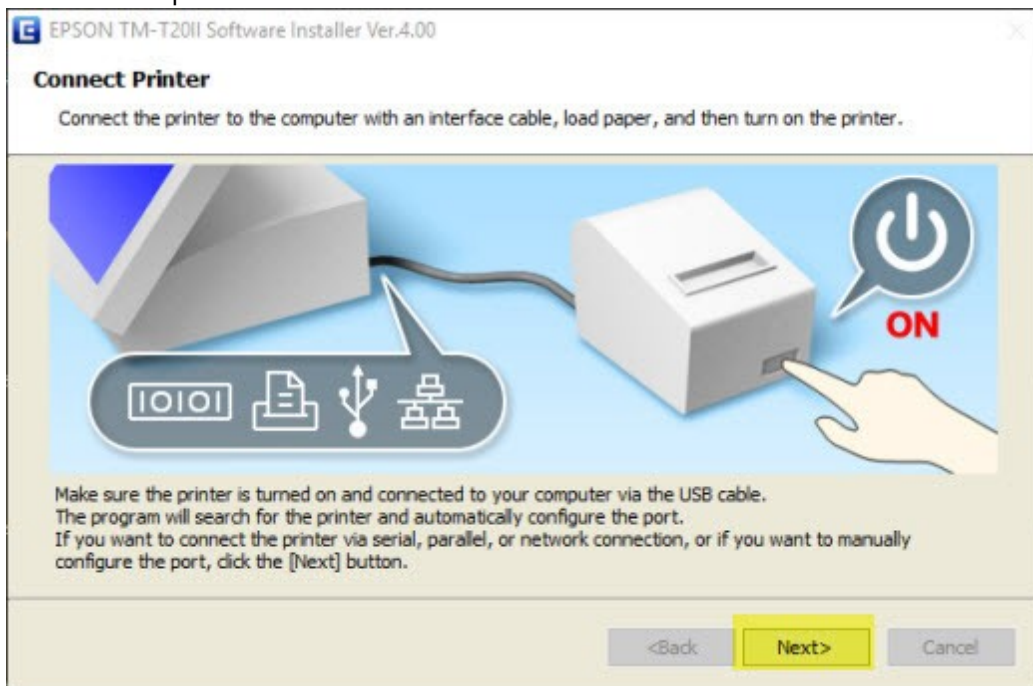
5. Verify that **USB port** is selected and click **Next** to continue.



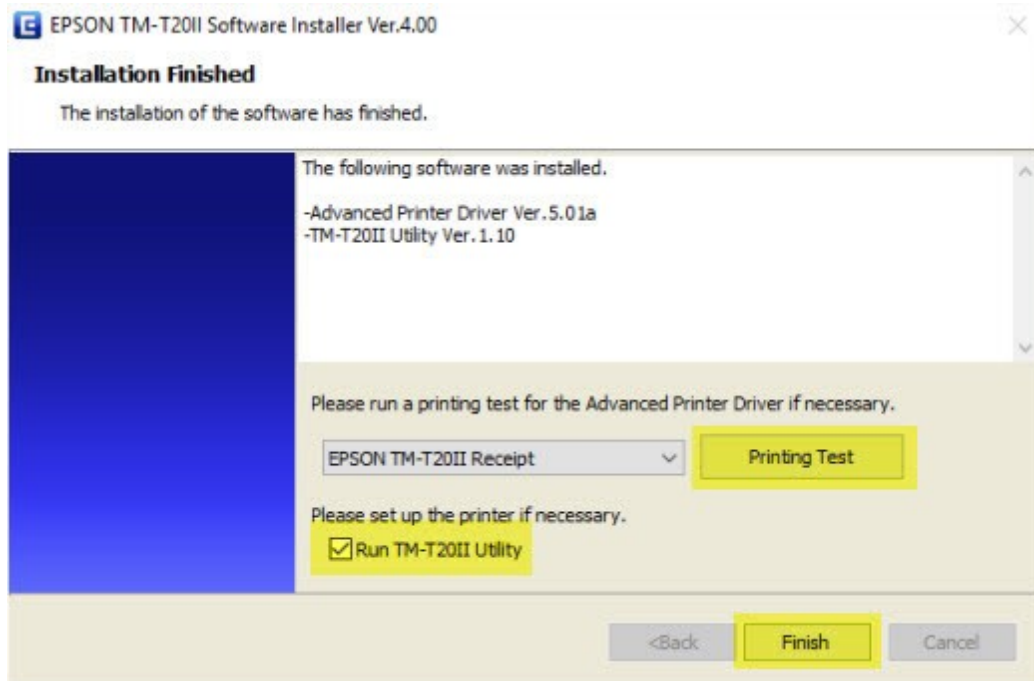
6. Click Install to **Install** the driver.



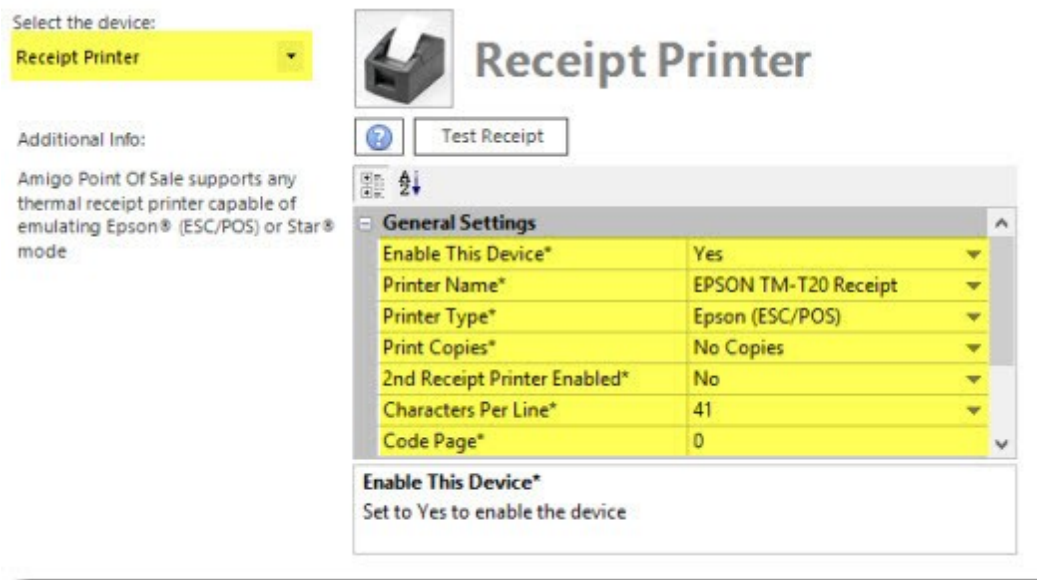
7. Connect the power supply and attach the USB cable. Click **Next** and Windows will automatically detect and install the printer.



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.



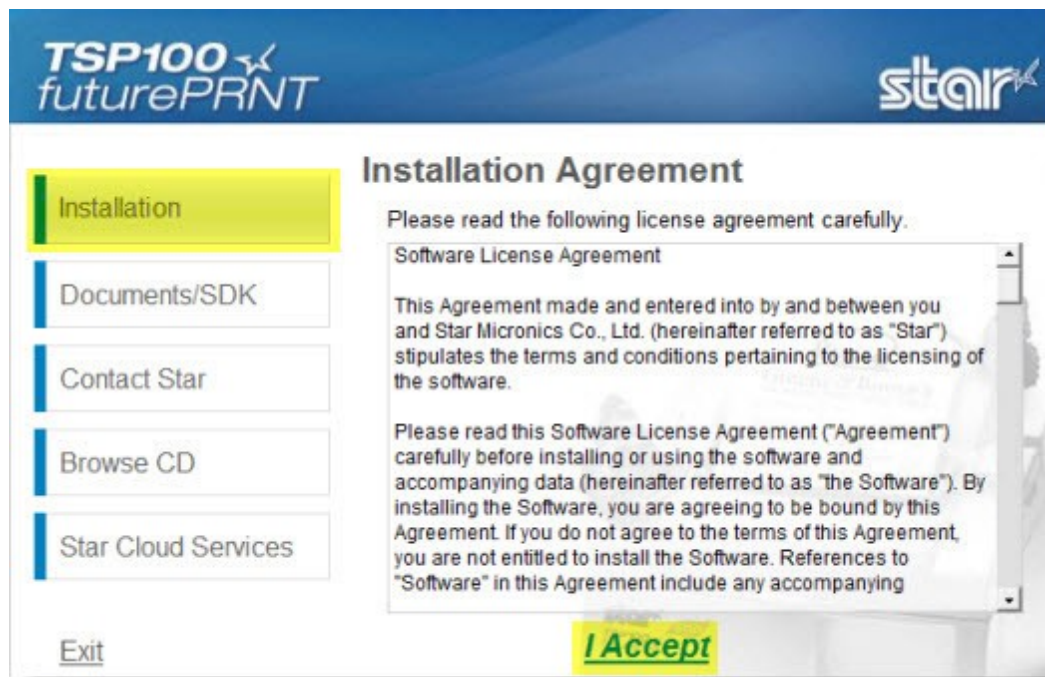
9. Open Back Office | Settings | Devices | Receipt Printer, select the TM-T20II Receipt printer from the drop-down list, set the printer type to Epson (ESC/POS) and print a test receipt to verify that the customer receipt is printed correctly.



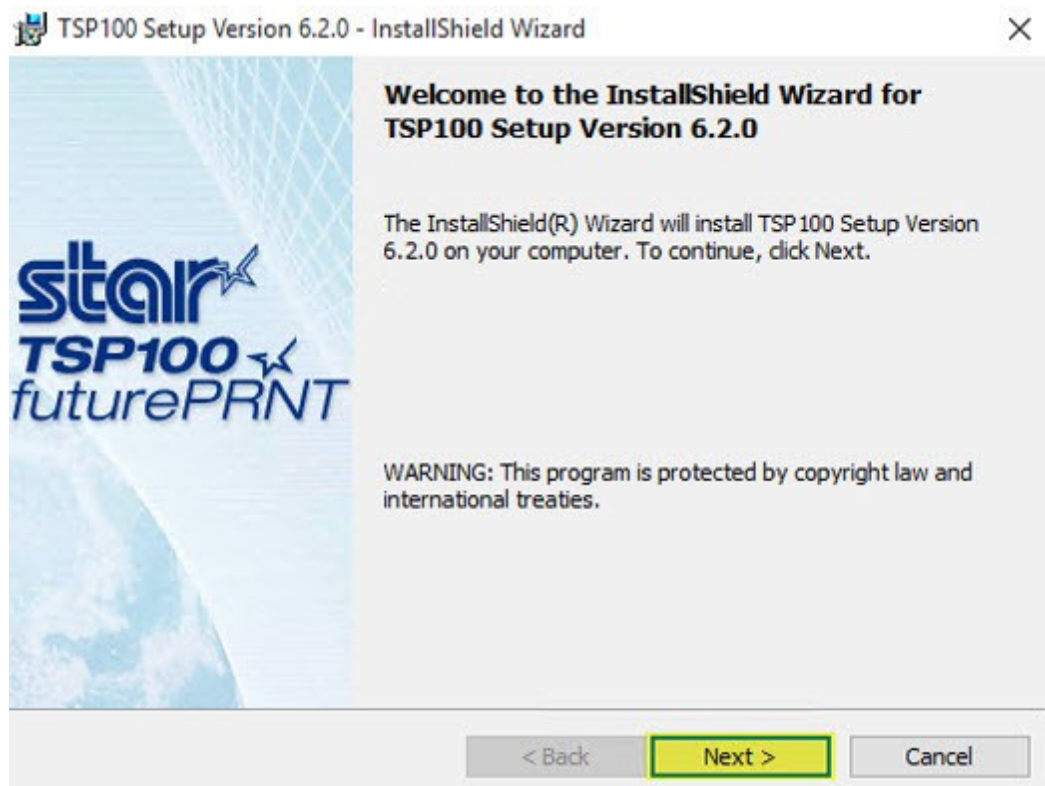
15.13.1.3 Star TSP100 USB

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.

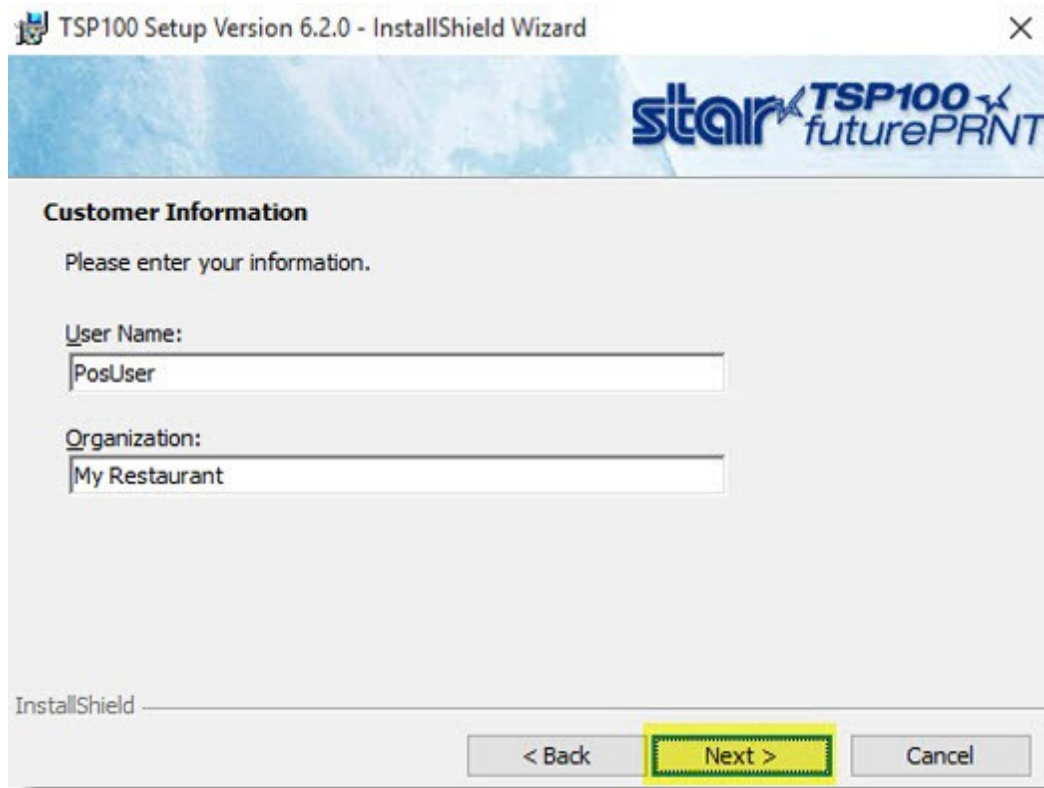
1. Insert the CD that came with the printer or download and unzip the driver installation package from <http://www.starmicronics.com>. Allow the disk to auto run or double-click on **autorun.exe**. Click **Install Now** and review the License Agreement. Click **I Accept** if you have read and agree with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



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



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



TSP100 Setup Version 6.2.0 - InstallShield Wizard

star TSP100 futurePRNT

Customer Information

Please enter your information.

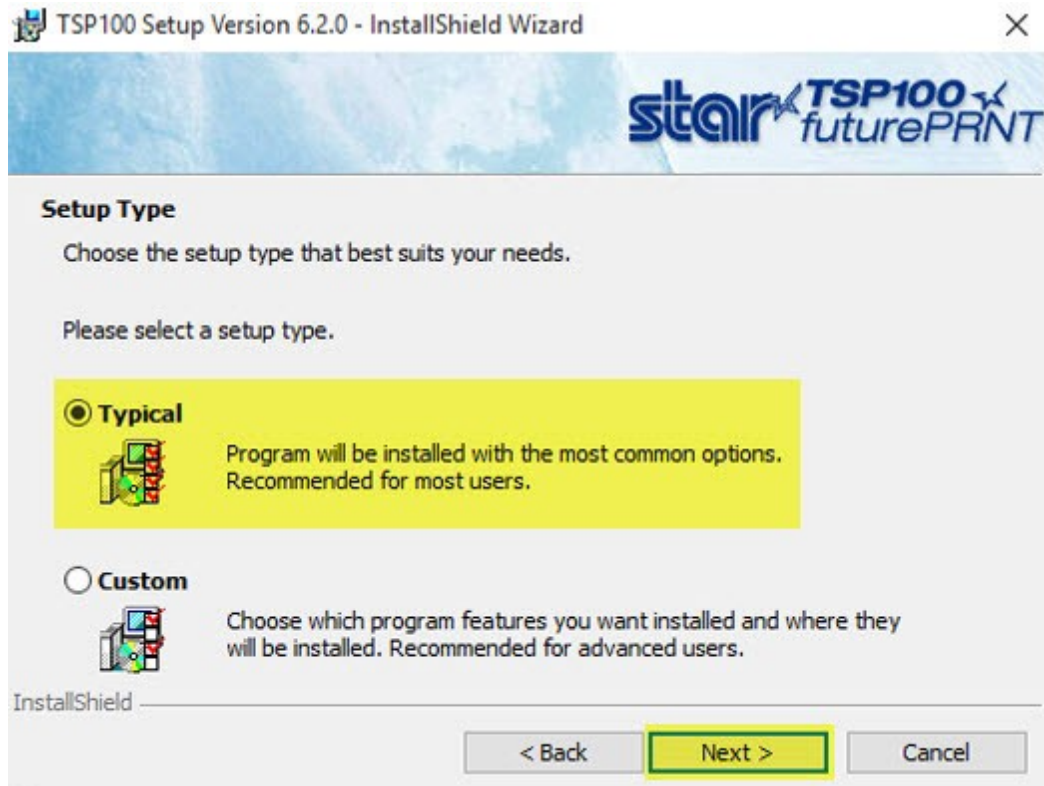
User Name:
PosUser

Organization:
My Restaurant

InstallShield

< Back Next > Cancel

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



TSP100 Setup Version 6.2.0 - InstallShield Wizard

star TSP100 futurePRNT

Setup Type

Choose the setup type that best suits your needs.

Please select a setup type.

☒ **Typical**

Program will be installed with the most common options. Recommended for most users.

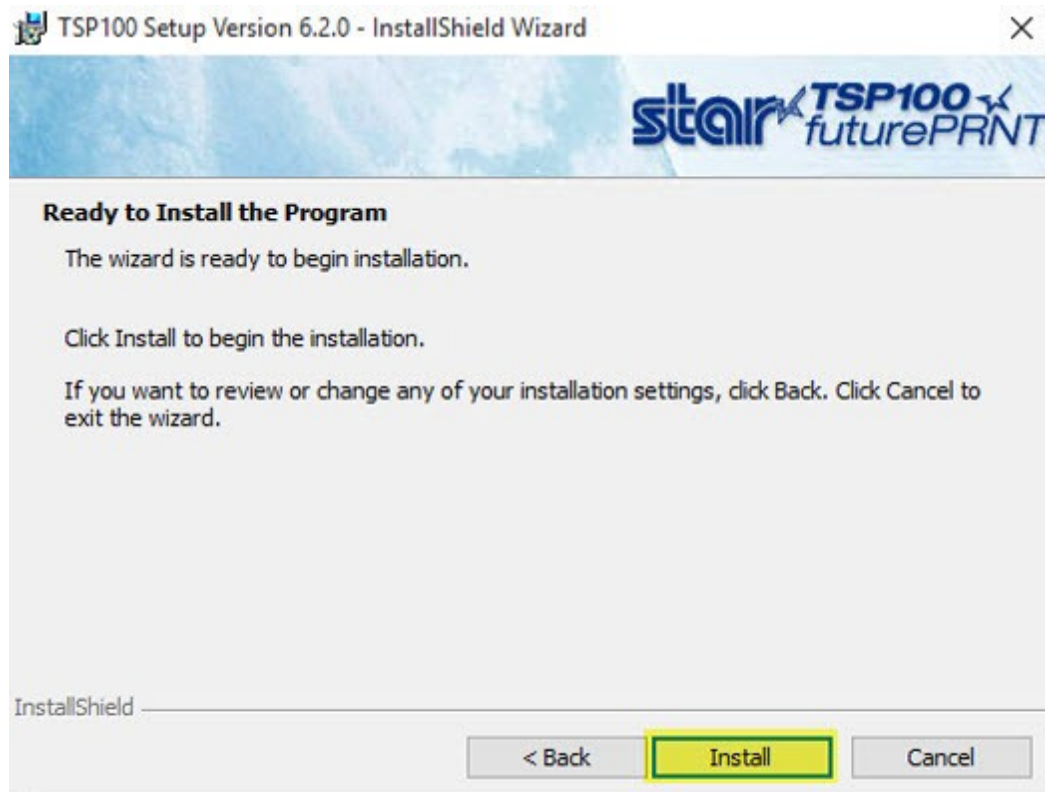
☐ **Custom**

Choose which program features you want installed and where they will be installed. Recommended for advanced users.

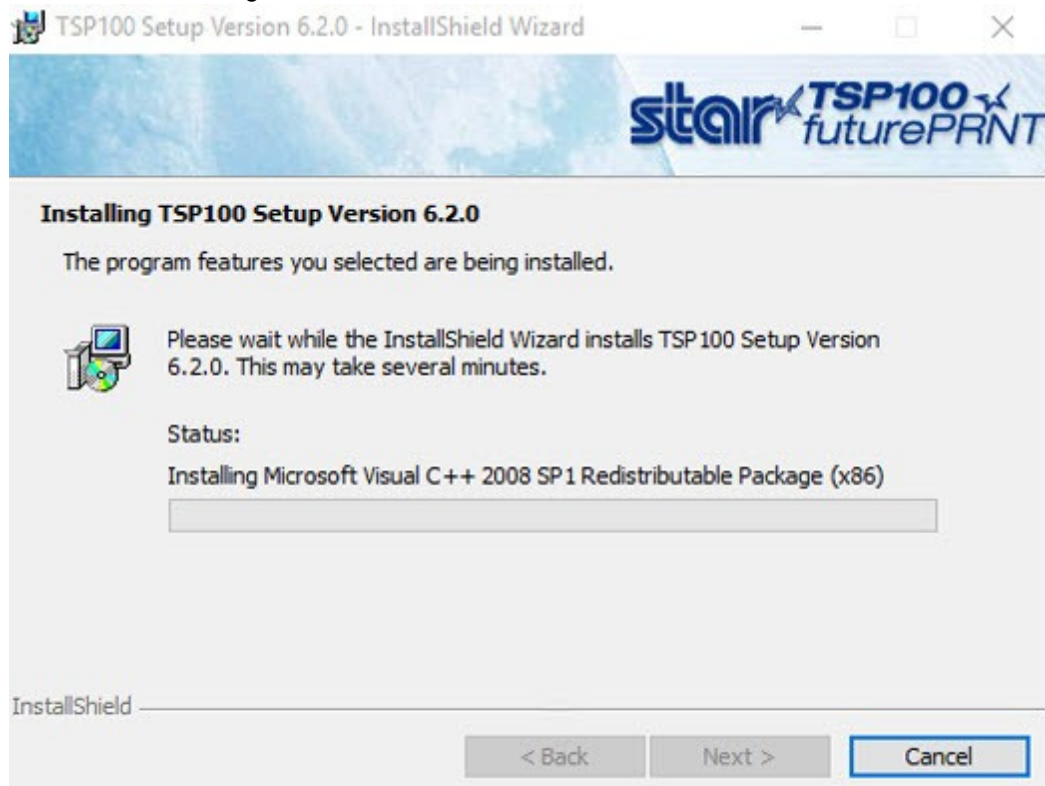
InstallShield

< Back Next > Cancel

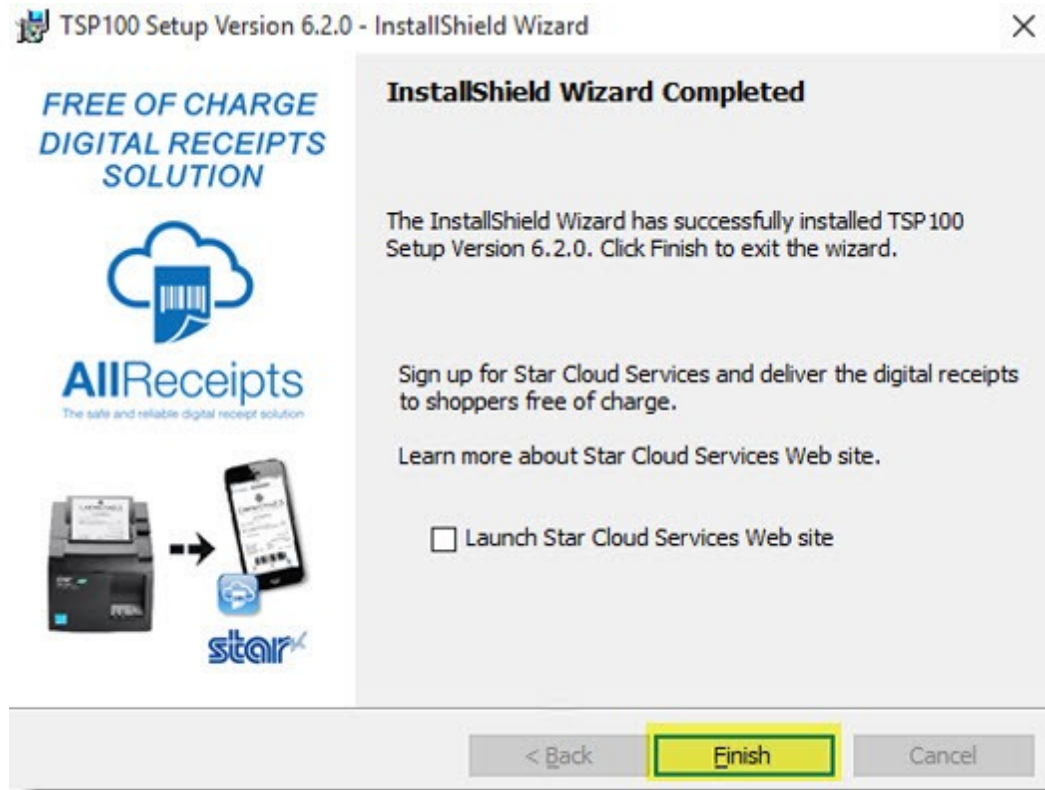
5. Click **Install** to begin the installation.



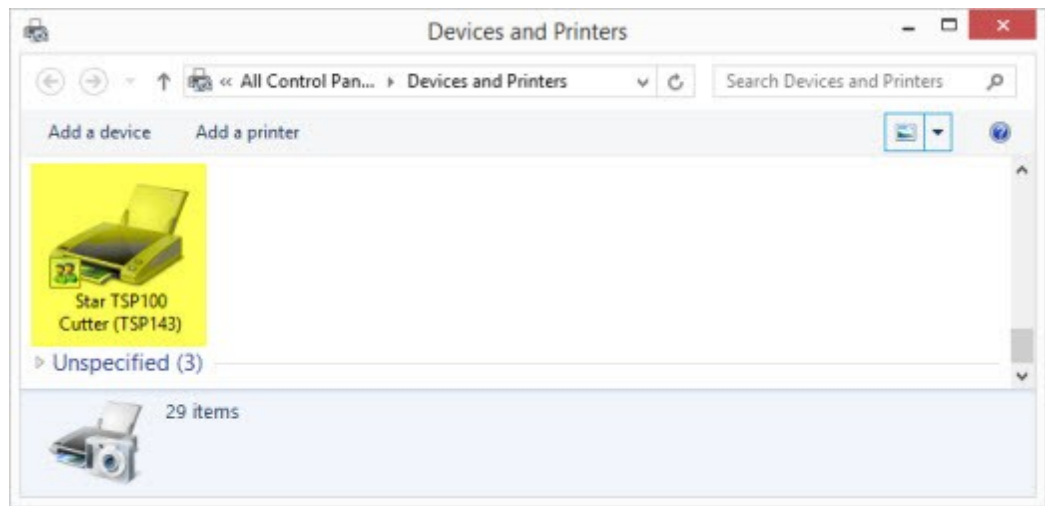
6. The installation will take approximately 2 minutes. Do not interrupt the process or use other programs while the installer is running.



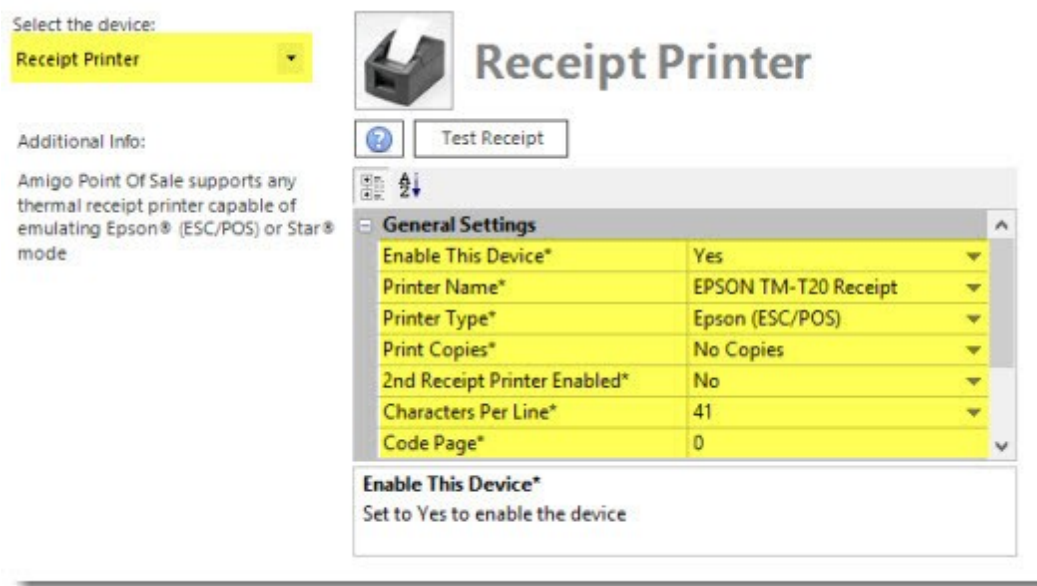
7. Click **Finish** to exit the installer.



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.



9. In AmigoPOS, navigate to Back Office | Settings | Devices 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.

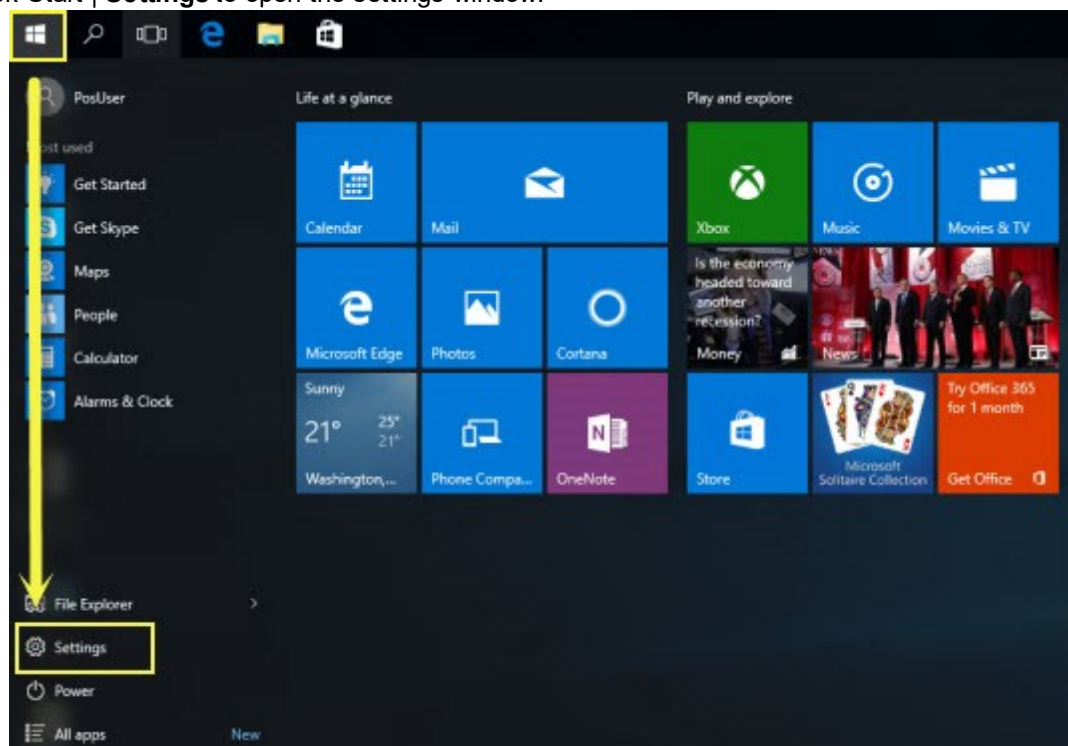


15.13.1.4 Serial or Parallel Port

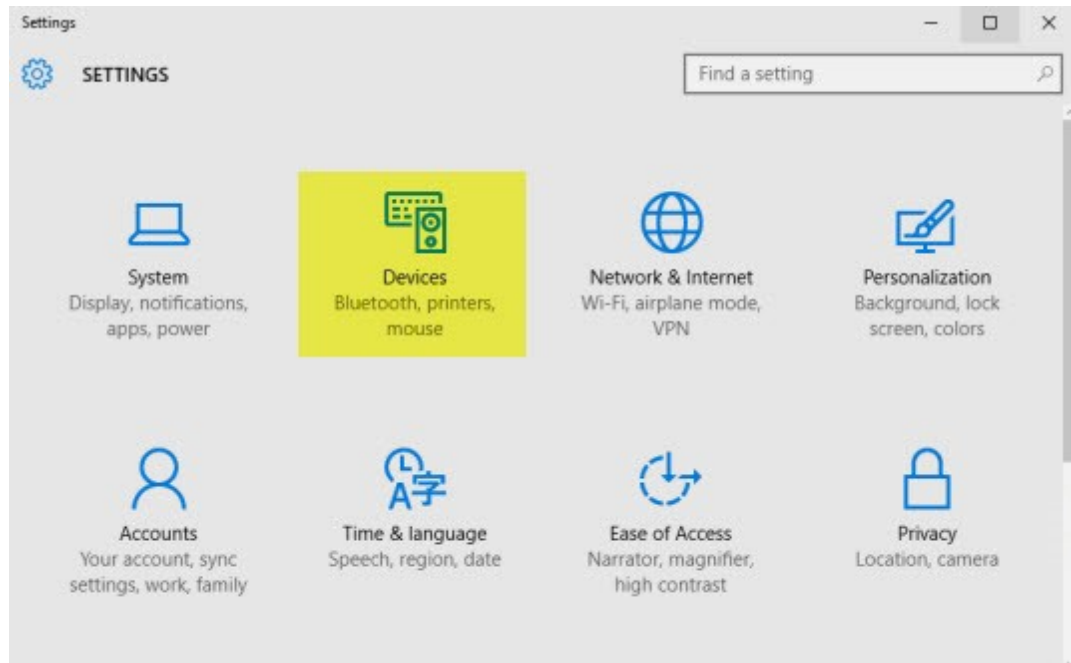
This topic applies to legacy printers that use a serial or parallel port interface. The instructions do not apply to most USB receipt printers, which require manufacturer device drivers. Refer to the [Star USB Printer Installation](#)^[374] topic or the [Epson USB Printer Installation](#)^[366] topic for specific instructions to install a USB interface receipt printer.

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.

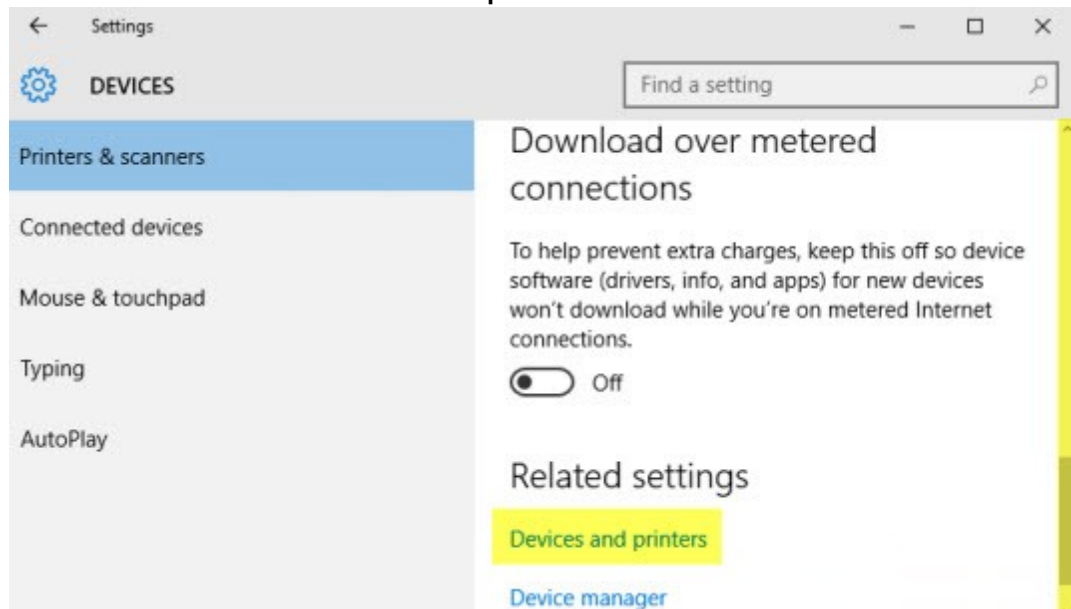
1. Click Start | **Settings** to open the settings window.



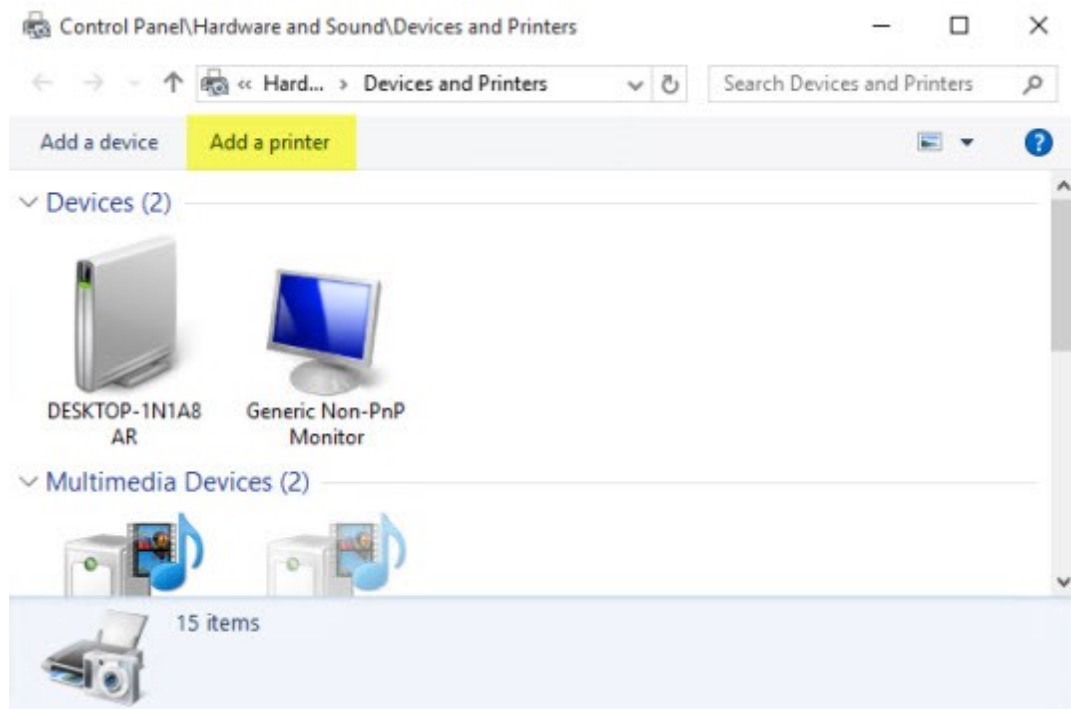
2. Select **Devices**.



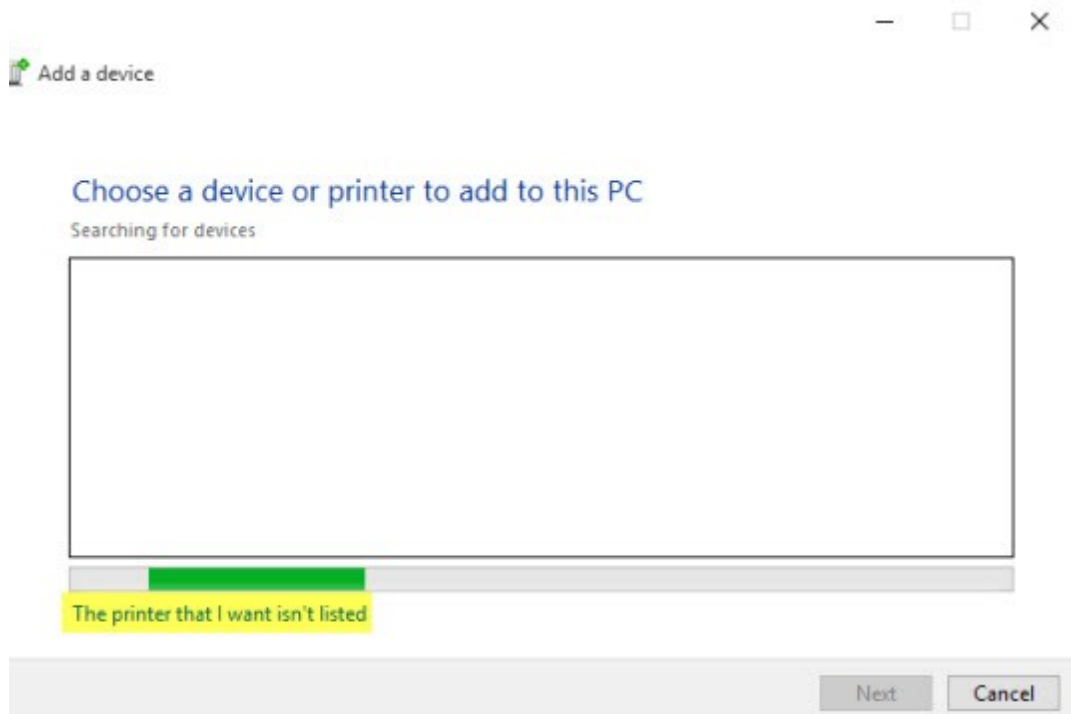
3. Scroll to the bottom and select **Devices and printers**.



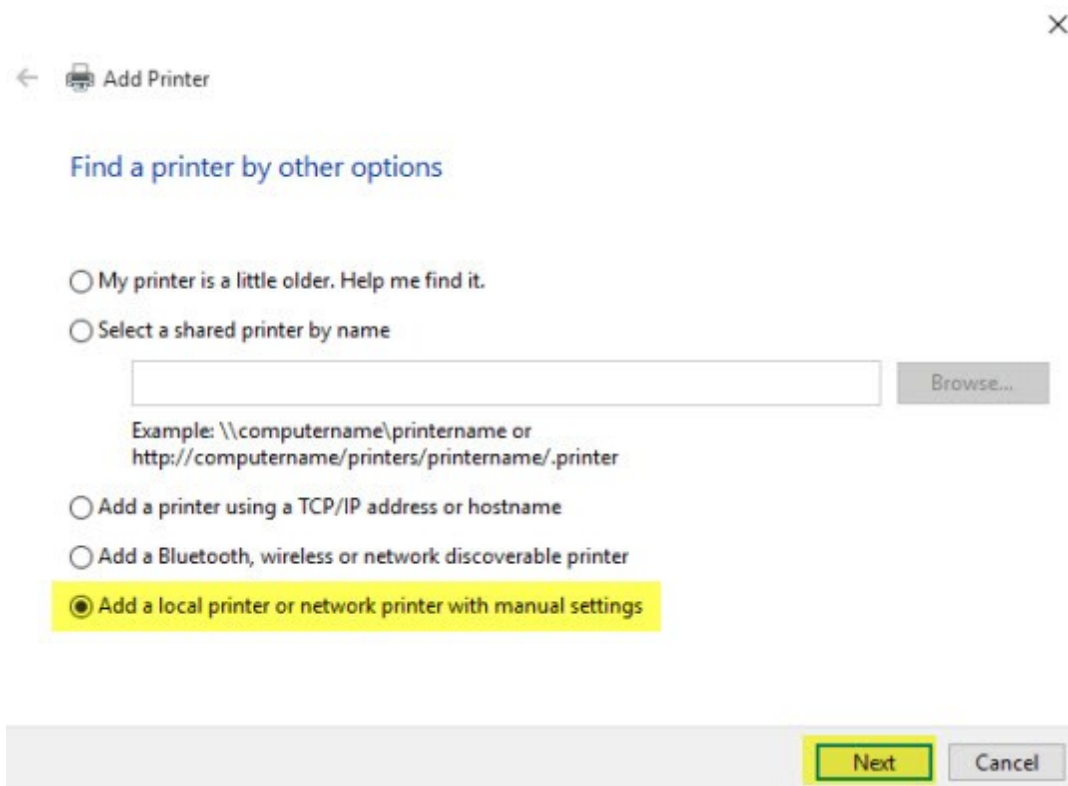
4. Click **Add a printer** on the explorer bar. The printer wizard will appear.



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



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



← Add Printer

Find a printer by other options

☐ My printer is a little older. Help me find it.

☐ Select a shared printer by name

Browse...

Example: \\computername\printername or
http://computername/printers/printername/.printer

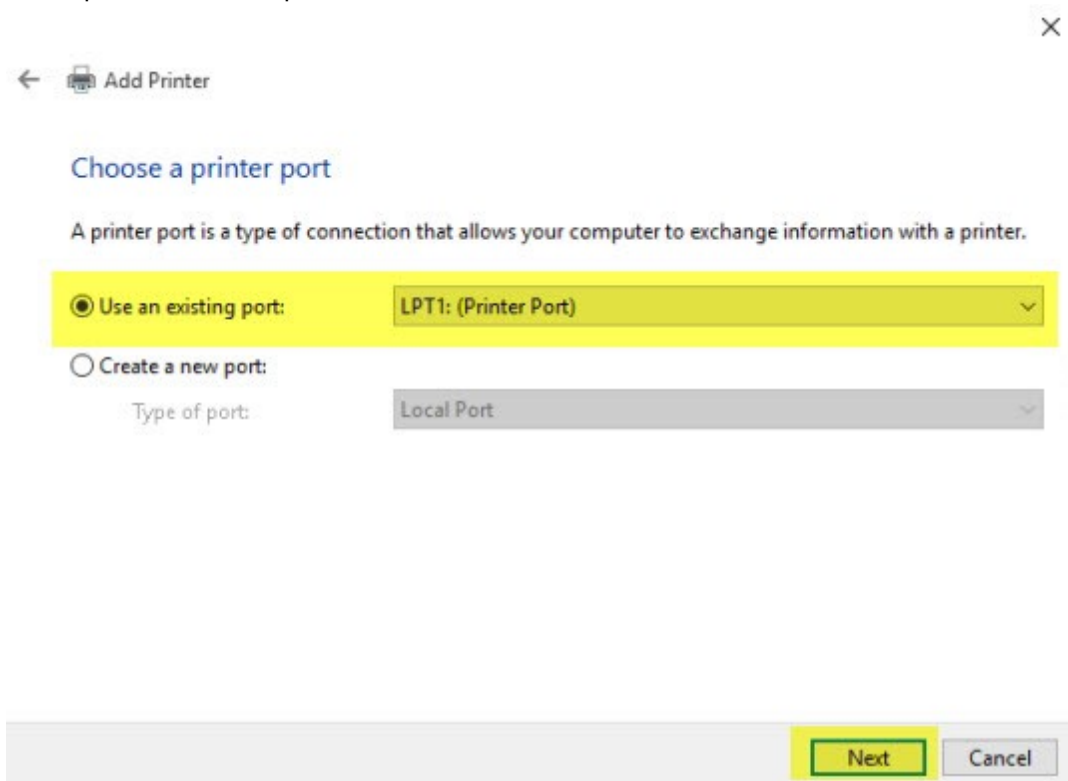
☐ Add a printer using a TCP/IP address or hostname

☐ Add a Bluetooth, wireless or network discoverable printer

☒ Add a local printer or network printer with manual settings

Next Cancel

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.

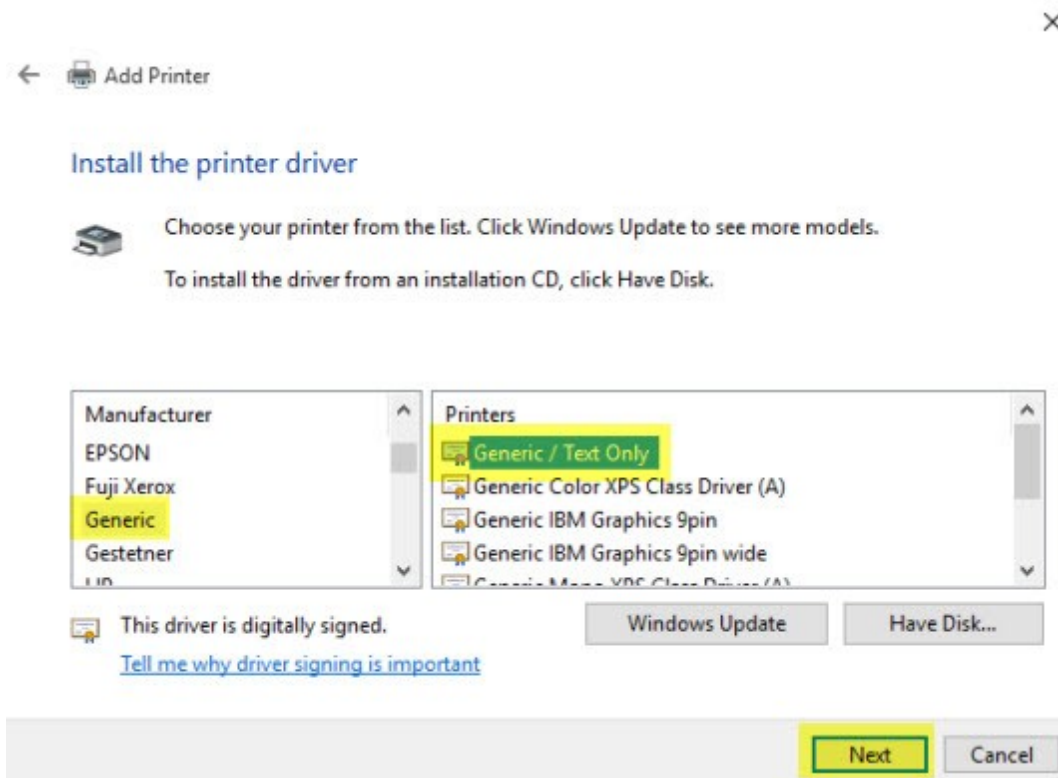
☒ Use an existing port: LPT1: (Printer Port)

☐ Create a new port:

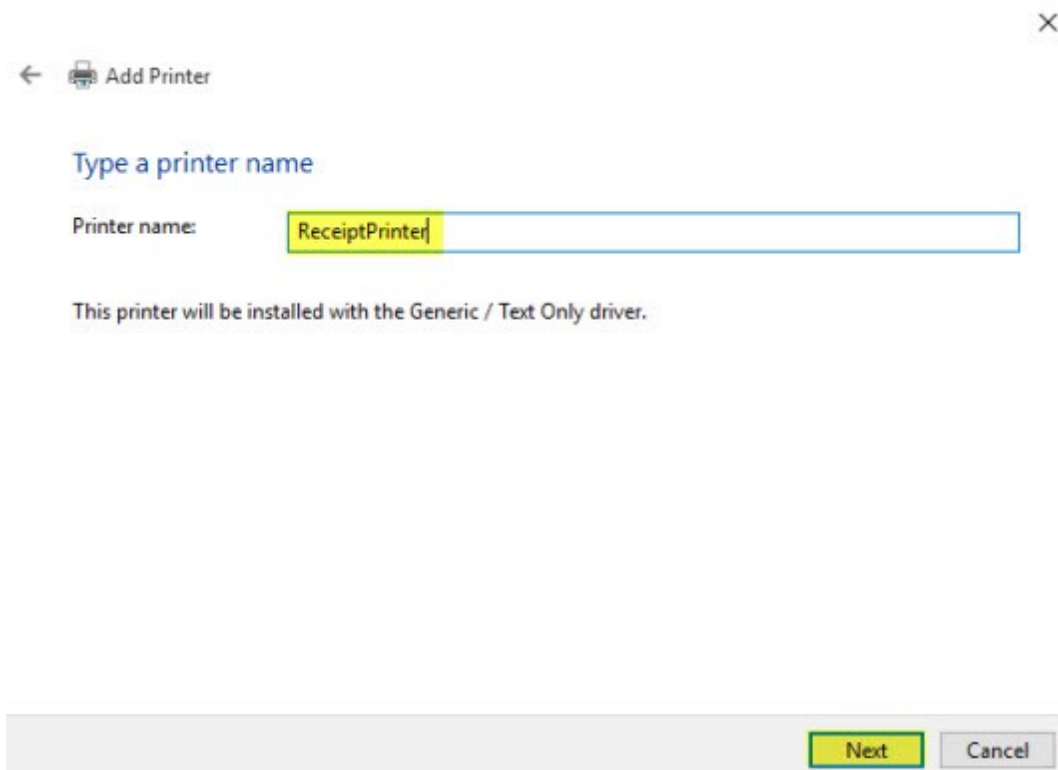
Type of port: Local Port

Next Cancel

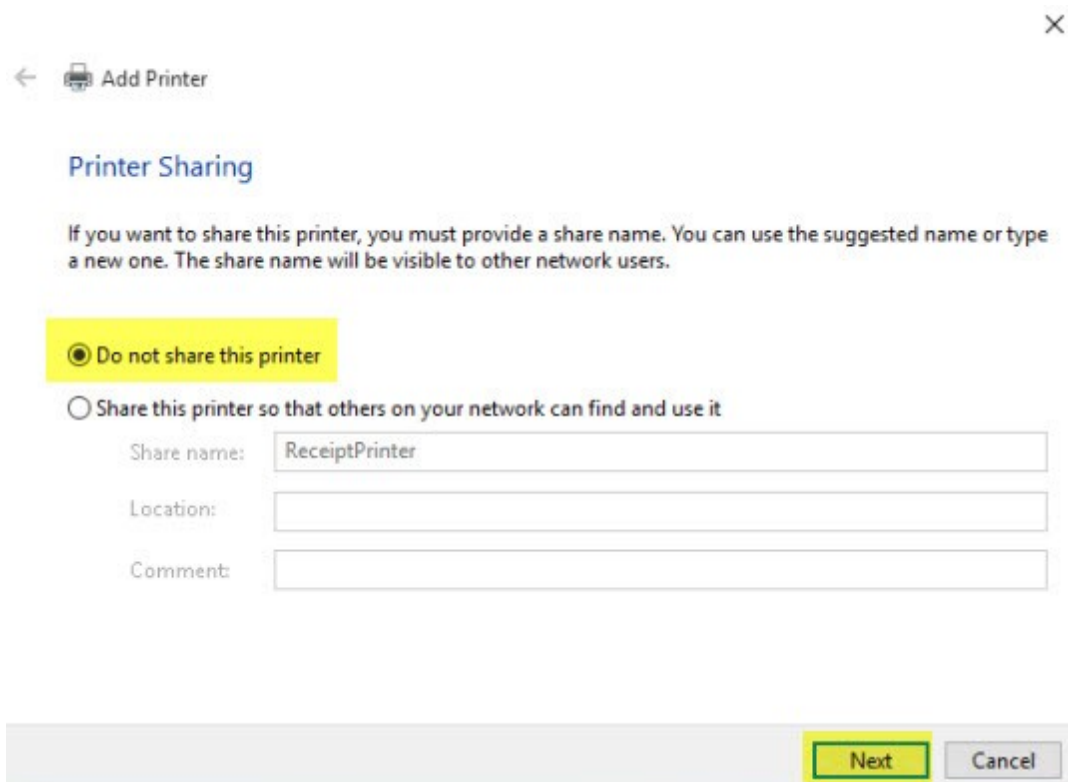
8. Select the **Generic/Text Only** printer driver and click **Next**.



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



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

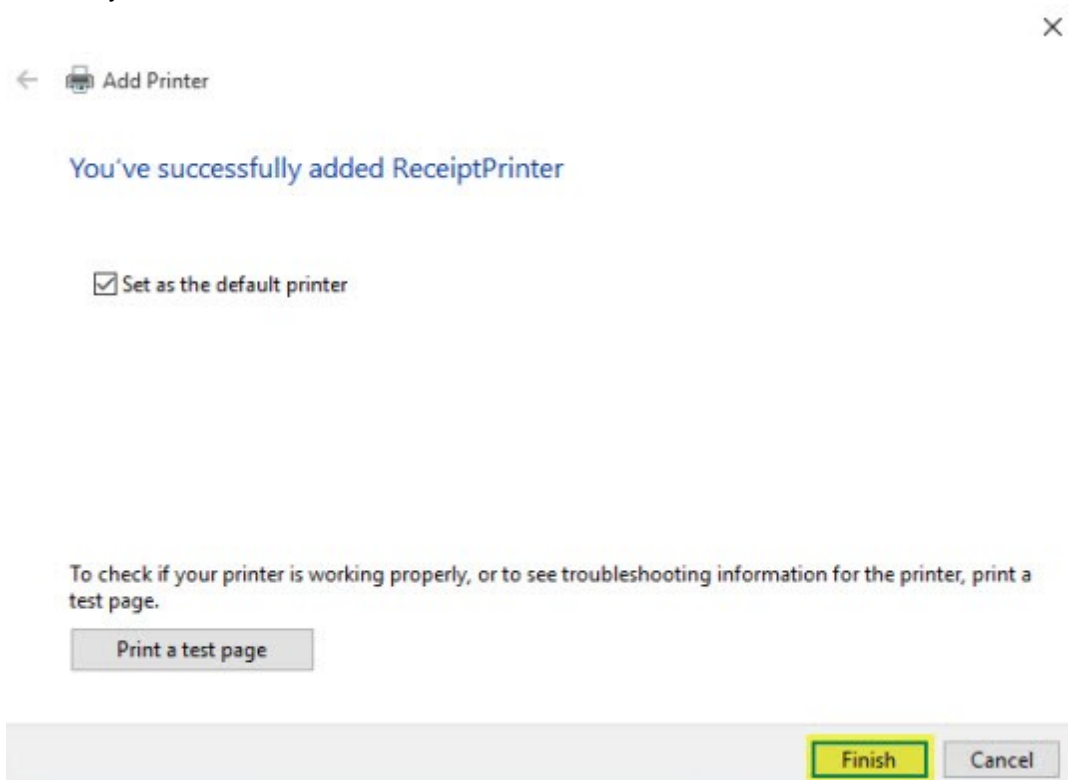
Share name: ReceiptPrinter

Location:

Comment:

Next Cancel

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



← Add Printer

You've successfully added ReceiptPrinter

☒ Set as the default printer

To check if your printer is working properly, or to see troubleshooting information for the printer, print a test page.

Print a test page

Finish Cancel

12. In AmigoPOS, navigate to Back Office | Settings | Devices 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.

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

15.13.2 Receipt Format Settings

In back office, navigate to back office | settings | devices and select receipt printer from the drop-down list.

Settings are organized as follows:


- [Local Settings](#)
- [Receipt Settings](#)
- [Order Type Specific Settings](#)



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**

  2


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


- **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
- **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](#)³⁹⁰. 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.

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.



Receipt Printer



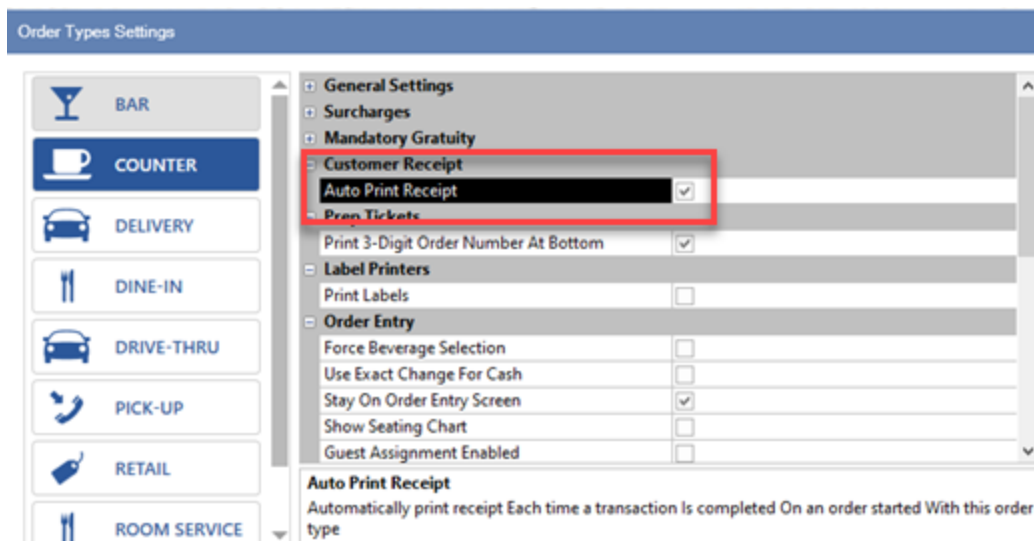
General Settings	
Printer Name*	EPSON TM-T20II Receipt ▼
Receipt Template*	Default Receipt Template ▼
Print Copies*	No Copies ▼
2nd Receipt Printer Enabled*	No ▼
2nd Pos/Tablet Server Receipt Printer*	EPSON TM-T20II Receipt ▼
Receipt Settings	
Round Order Total	0
Auto Settle Fractional Balance	No ▼
Auto Settle Orders With No Transactions	No ▼
Combine Ticket Items	No ▼
Print Ticket After Void	Yes ▼
Print Ticket Zero Cost Options	Yes ▼

Printer Name*
Select the printer from the drop-down list.

- 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 After Void: Set to Yes to automatically print customer receipt after voiding an order.
- 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

Enable the Auto Print Receipt setting to automatically print a customer receipt when the order is submitted. Open the [order types](#) ⁷²⁰ editor and select the order type from the drop-down list to view the setting.



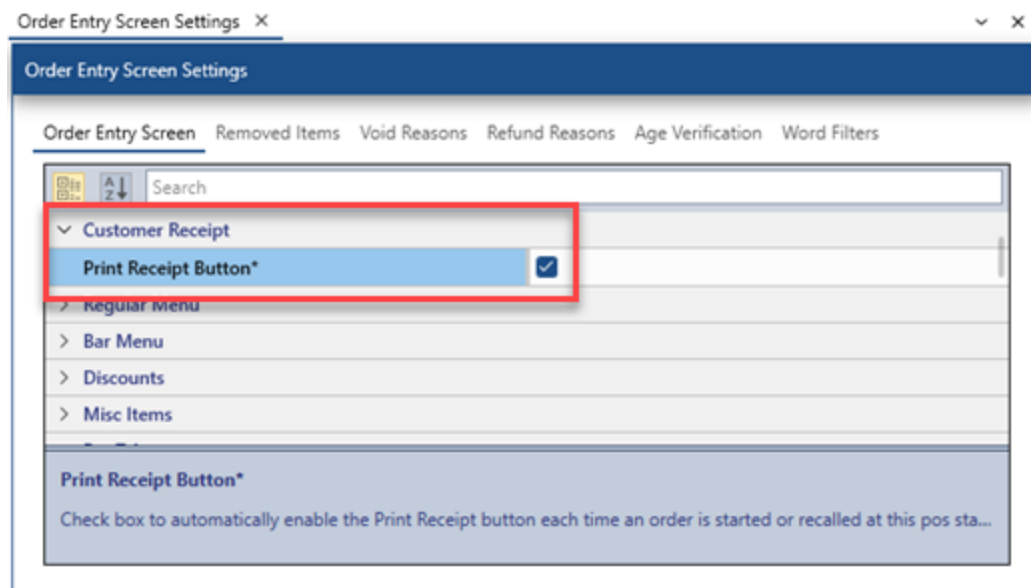
15.13.3 Receipt Printing Settings

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](#) ³⁸⁸
2. [Print a customer receipt for selected order types only](#) ³⁸⁹
3. [Print a customer receipt when order is settled](#)

Always print a customer receipt when the order is submitted

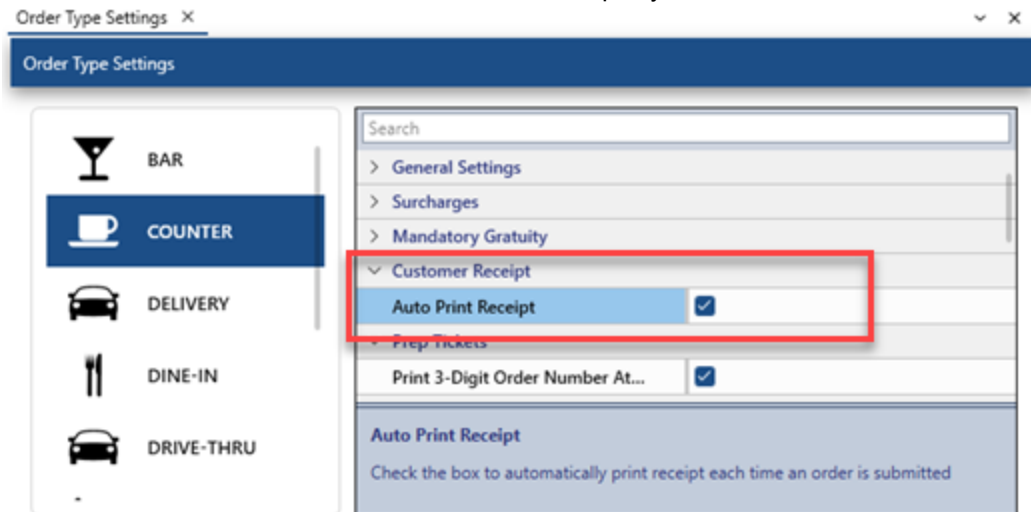
To automatically enable the print receipt button each time an order is started or recalled, set the **Print Receipt By Default** value to **Yes** in Back Office | Settings | Main Settings | Order Entry, as shown below. This value determines the state of the Print Receipt button each time an order is started or recalled.





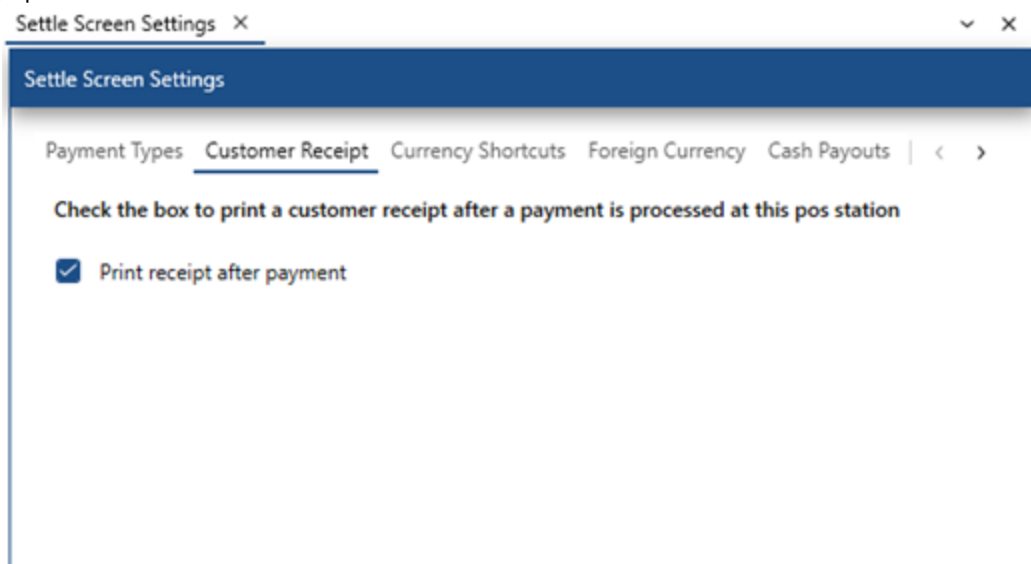
Print a customer receipt for selected order types only

To always print a customer receipt for a specific order type when the when the order is submitted on the order entry 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. This value applies to orders submitted at all pos stations and tablets and overrides the Print Receipt By Default value.



Print a customer receipt when order is settled

To always print a customer receipt after the order is settled when a payment is saved on the credit card or settle screen, set the **Print receipt after payment** checkbox in Back Office | Settings | Main Settings | Settle Screen.



15.13.4 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.

The screenshot shows the 'Device Settings' window for a 'Receipt Printer'. On the left, there's a sidebar with 'Select the device:' set to 'Receipt Printer' and 'Additional Info:' stating 'Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode'. The main area is titled 'Receipt Printer' and has a 'Test Receipt' button. Below this is a 'General Settings' section with a table of options:

General Settings	
Printer Name*	EPSON TM-T20II Receipt
Receipt Template*	Default Receipt Template
Print Copies*	No Copies
2nd Receipt Printer Enabled*	Yes
2nd Pos/Tablet Server Receipt Printer*	EPSON TM-T20II Receipt

Below the general settings is a 'Receipt Settings' section with a table:

Receipt Settings	
Round Order Total	0
Auto Settle Fractional Balance	No

At the bottom, there's a note: '2nd Receipt Printer Enabled* Set to Yes to send a duplicate customer receipt to the receipt printer 2'.

15.13.5 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 | Devices | Receipt Printer and set the value of **Combine Ticket Items** to **Yes**.

The screenshot shows the 'Device Settings' window for a 'Receipt Printer'. On the left, there's a sidebar with 'Select the device:' set to 'Receipt Printer' and 'Additional Info:' stating 'Amigo Point Of Sale supports any thermal receipt printer capable of emulating Epson® (ESC/POS) or Star® mode'. The main area is titled 'Receipt Printer' and has a 'Test Receipt' button. Below this is a 'General Settings' section with a table of options:

General Settings	
Printer Name*	EPSON TM-T20II Receipt
Receipt Template*	Default Receipt Template
Print Copies*	No Copies
2nd Receipt Printer Enabled*	Yes
2nd Pos/Tablet Server Receipt Printer*	EPSON TM-T20II Receipt

Below the general settings is a 'Receipt Settings' section with a table:

Receipt Settings	
Round Order Total	0
Auto Settle Fractional Balance	No
Auto Settle Orders With No Transactions	No
Combine Ticket Items	Yes
Print Ticket After Void	Yes
Print Ticket Zero Cost Optionals	Yes

At the bottom, there's a note: 'Combine Ticket 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.'

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

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

15.14 Scale

15.14.1 Setup

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 following help topic applies to most OPOS scales. Note that the [next help topic](#)^[400] 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 and follow the on-screen instructions.

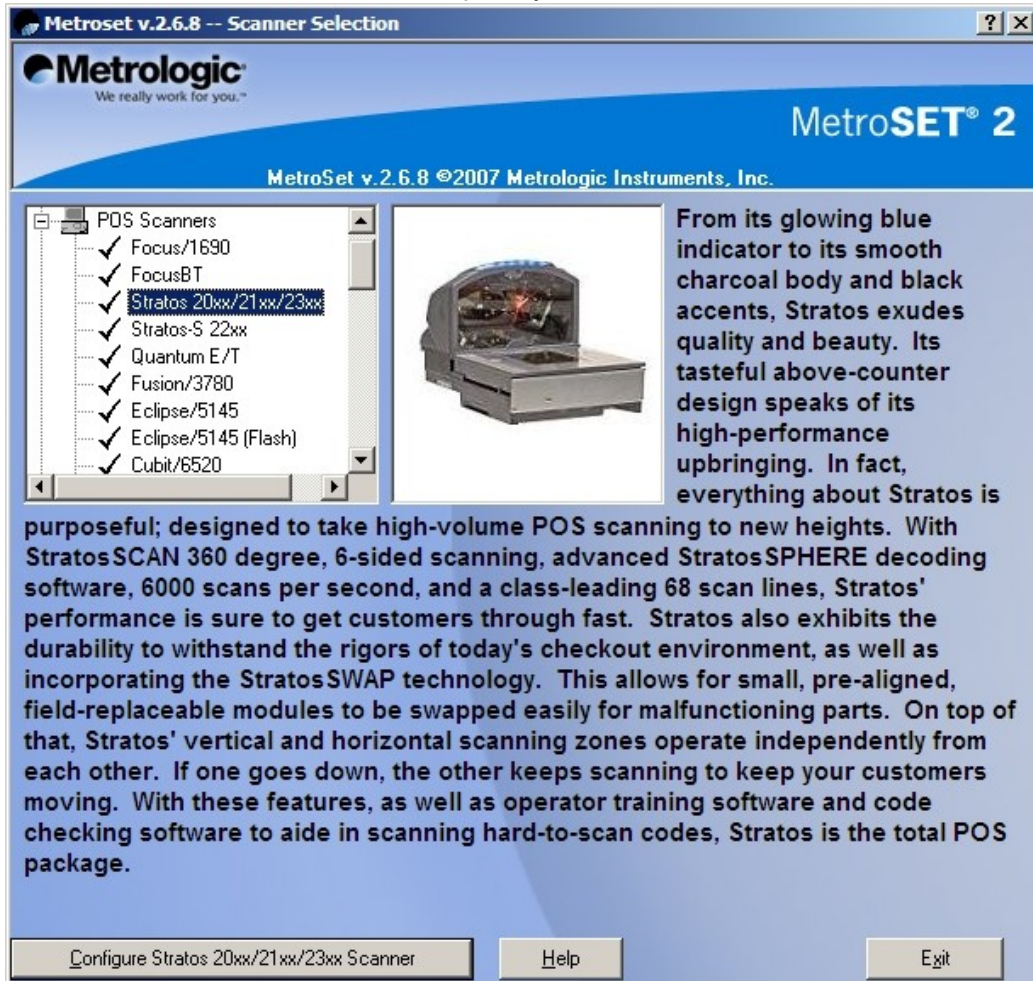
The following example describes the installation and setup of a Metrologic Stratos 2320 Scale/Scanner using a single RS232 cable to communicate with the host PC. Many other manufacturers offer scale and scanner OPOS drivers, including Avery Berkel, Symbol and Datalogic.

Installation is described in 3 steps:

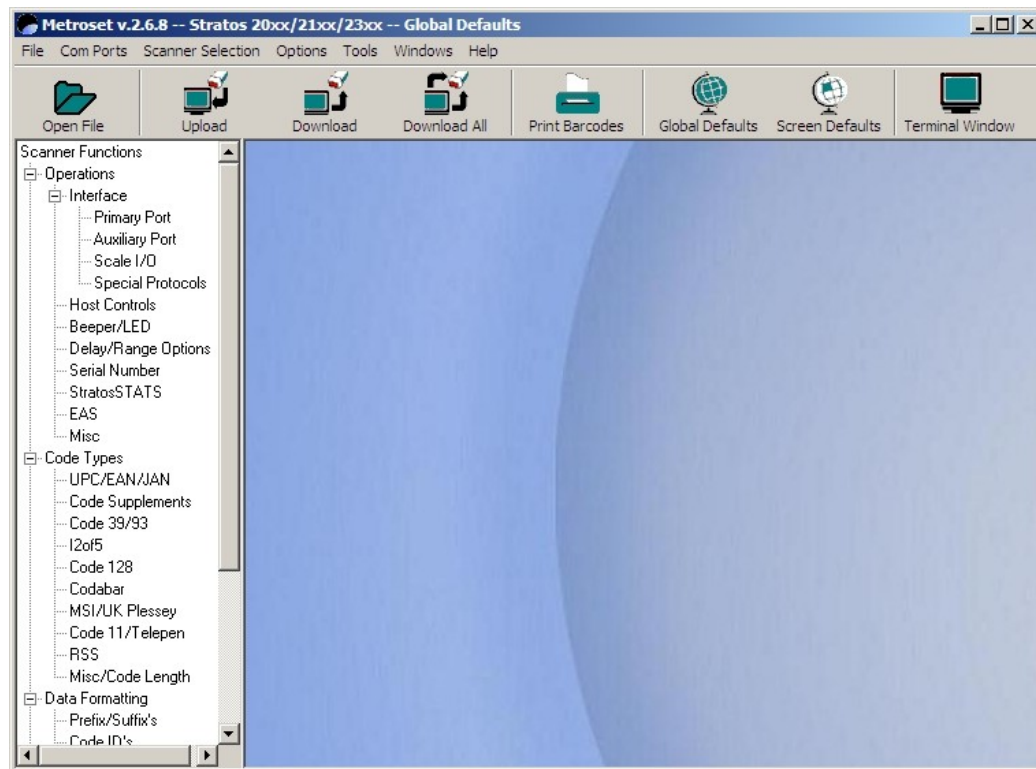
1. [Device Configuration](#)
2. [OPOS Configuration](#)
3. [AmigoPOS Configuration](#)

Device Configuration

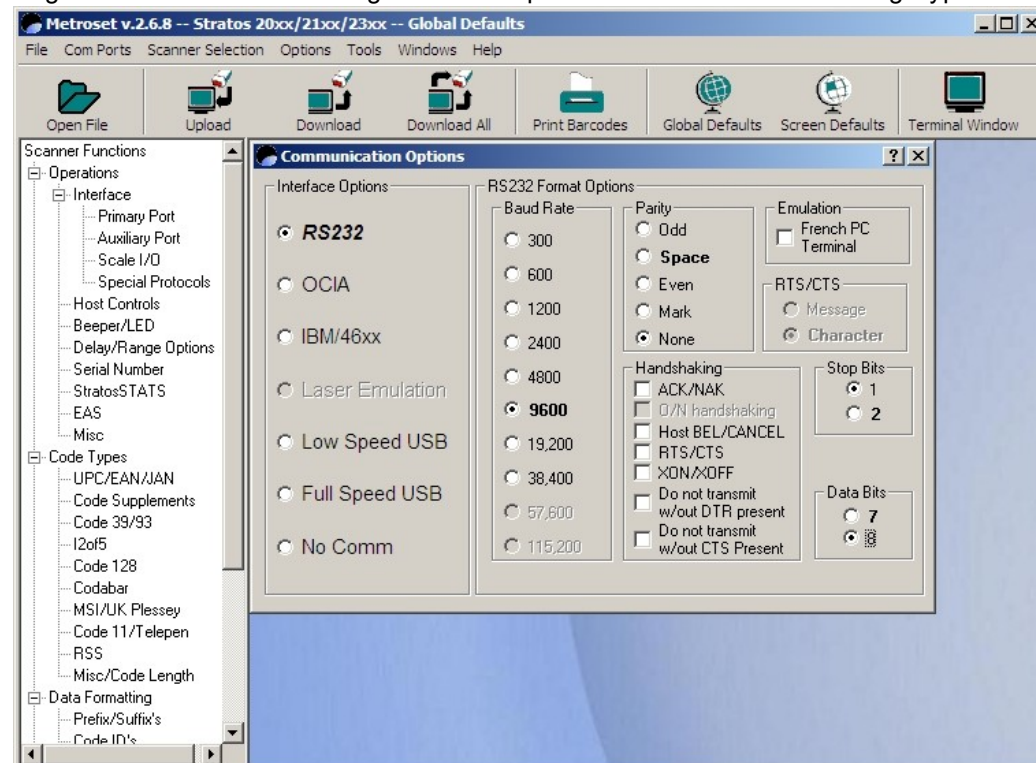
1. Download and install the manufacturer's setup utility



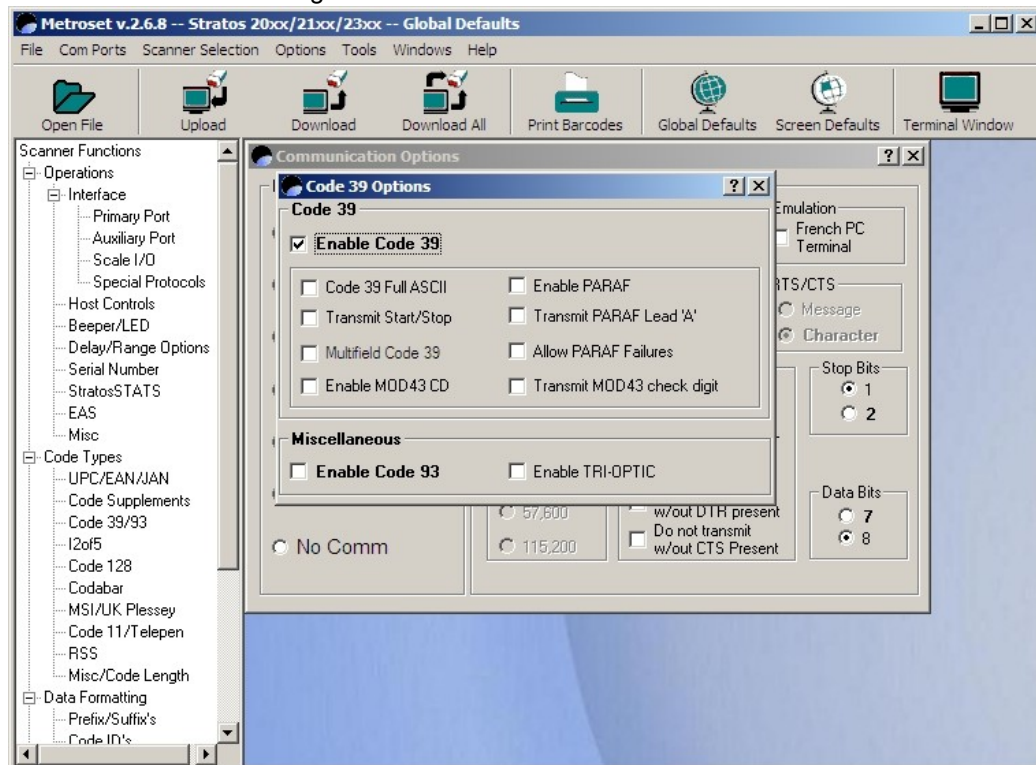
2. Select the device and click the Configure button



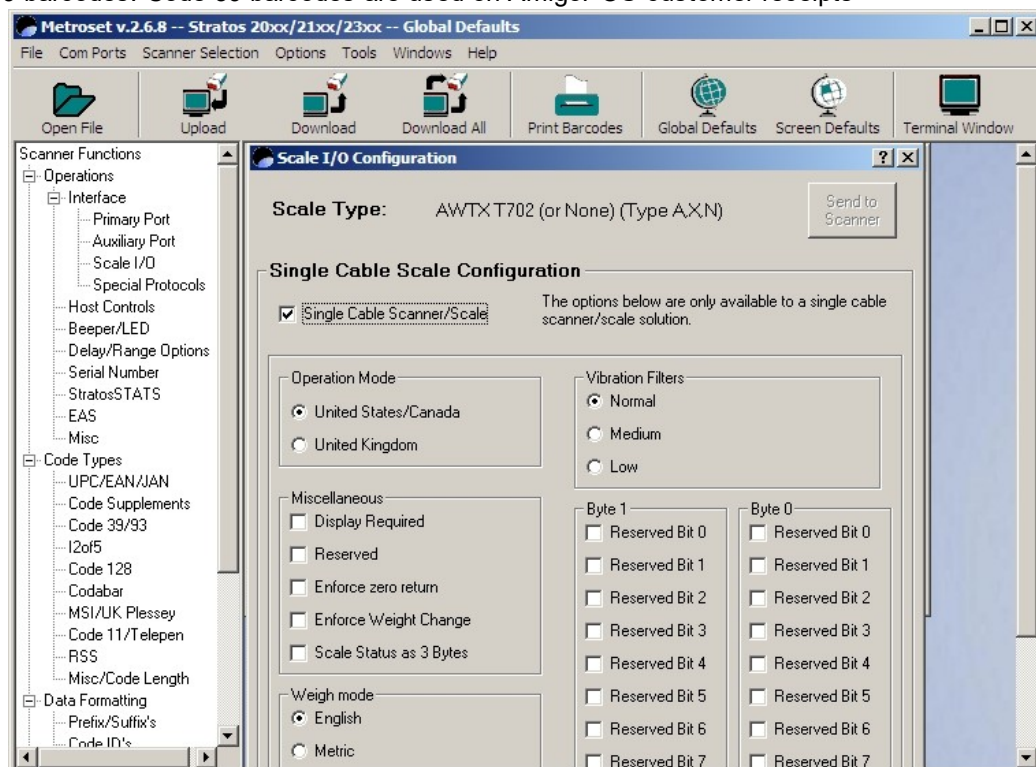
3. Select the correct port from the Com Ports menu button. You may then upload the device's current configuration by clicking the Upload button. If an error occurs during the upload process, check the Com Port settings in Windows device manager and attempt to connect to the device using HyperTerminal.



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

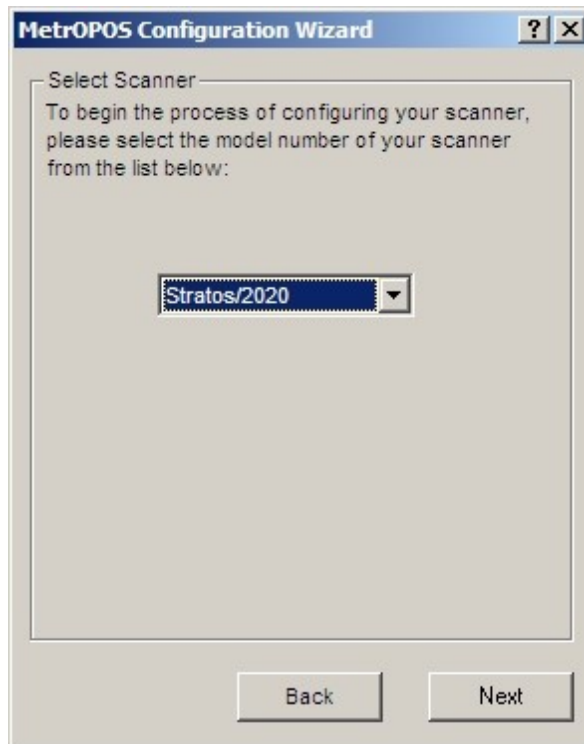


5. Click Code 39/93 under the Code Types category. Check the box to enable the scanner to decode Code 39 barcodes. Code 39 barcodes are used on AmigoPOS customer receipts

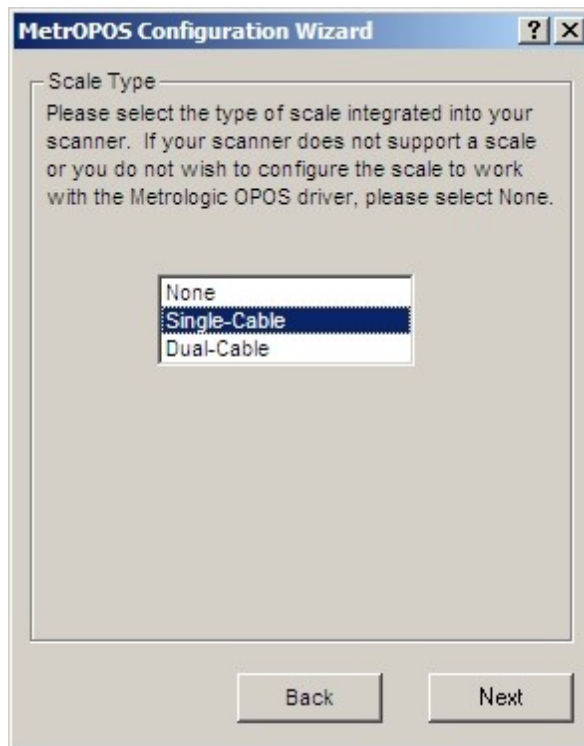


6. Click the scale I/O button and check the box to enable Single Cable Scanner/Scale operation. This allows the host to communicate with both the barcode scanner and scale over a single RS232 cable. If your configuration uses 2 RS232 cables, this box should be left unchecked.
7. To complete the scanner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

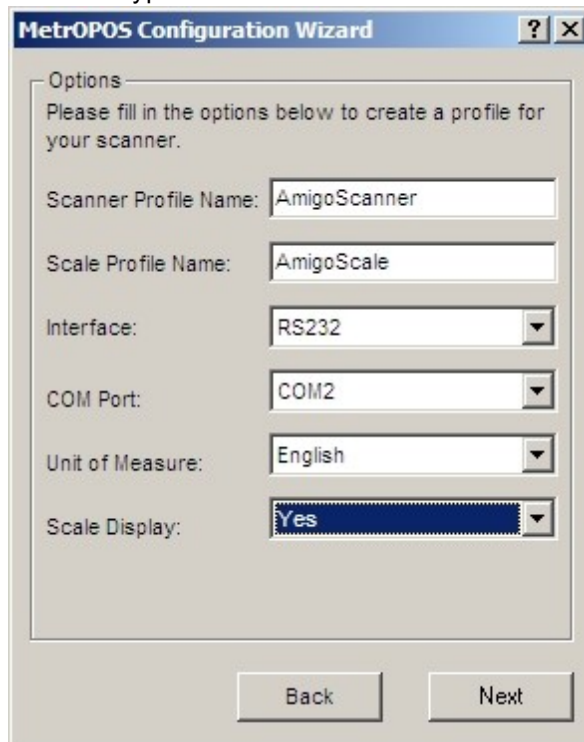
OPOS Configuration



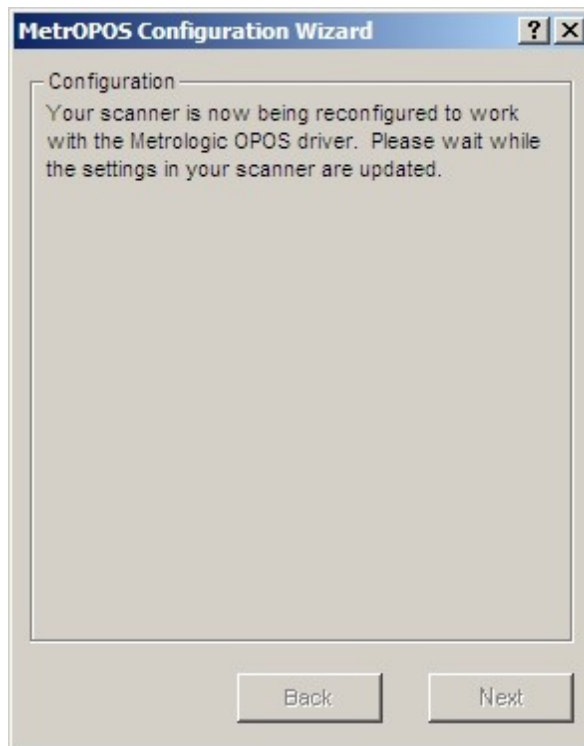
1. Download and install the Metrologic OPOS configuration utility.(MetrOPOS). Run the utility and select the Stratos/2020 from the list that appears on the configuration wizard.



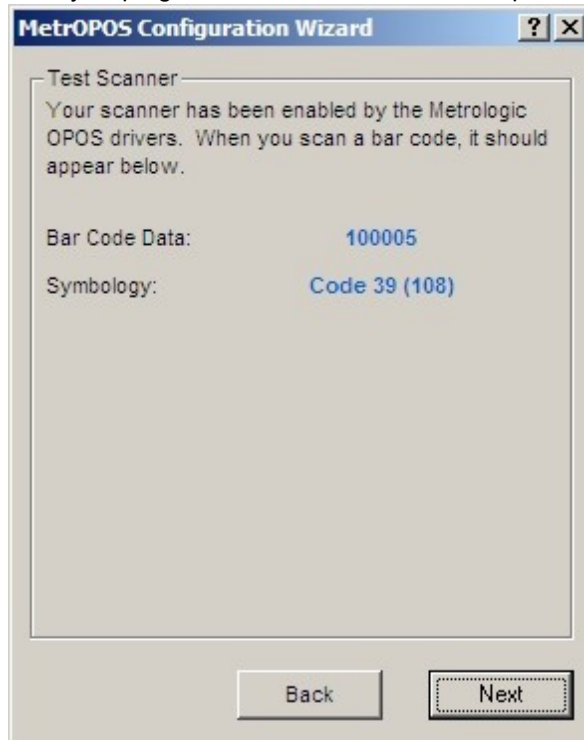
2. Select Single-Cable as the Scale Type and click Next



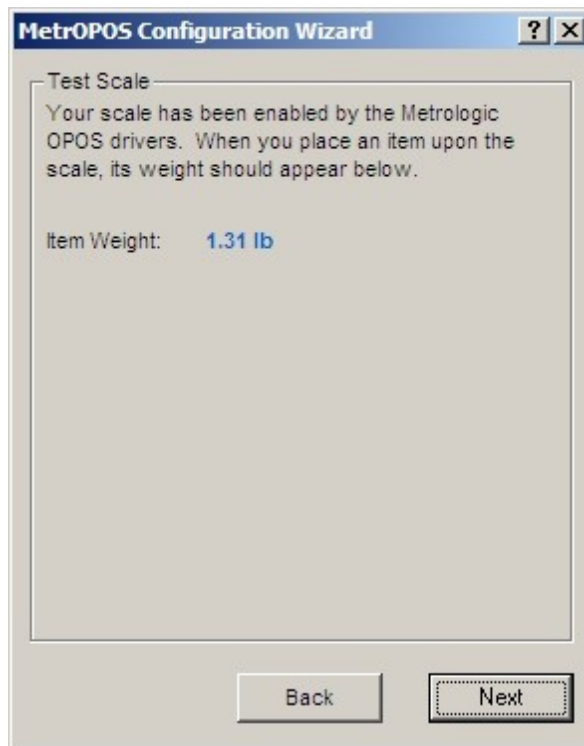
3. Enter a user friendly name for both the barcode scanner and scale and click Next



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



5. Test the barcode scanner and click Next



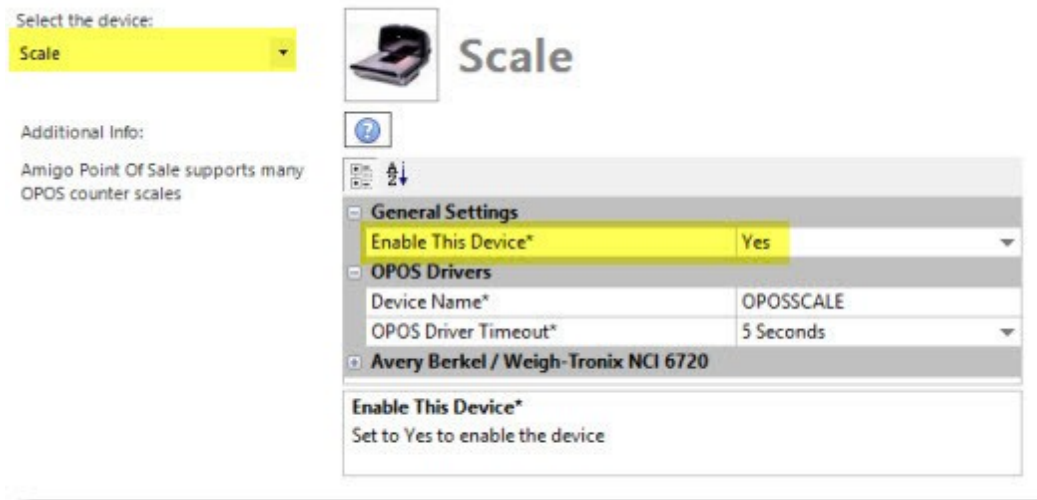
6. Test the Scale and click Next



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.

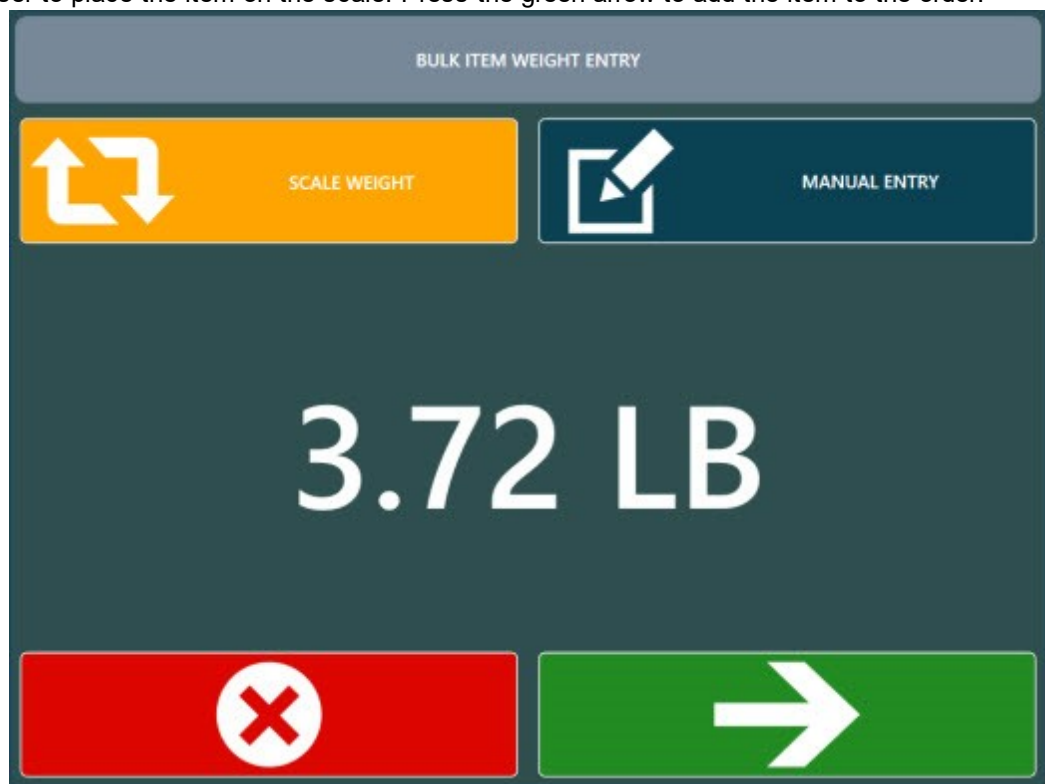
AmigoPOS Configuration

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



The screenshot shows the 'Scale' configuration window. On the left, there is a 'Select the device:' dropdown menu with 'Scale' selected. Below it, 'Additional Info:' states 'Amigo Point Of Sale supports many OPOS counter scales'. The main area on the right is titled 'Scale' and contains a 'General Settings' section with 'Enable This Device*' set to 'Yes'. Below this is the 'OPOS Drivers' section, which includes 'Device Name*' set to 'OPOSSCALE' and 'OPOS Driver Timeout*' set to '5 Seconds'. At the bottom, there is a section for 'Avery Berkel / Weigh-Tronix NCI 6720' with 'Enable This Device*' set to 'Set to Yes to enable the device'.

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.

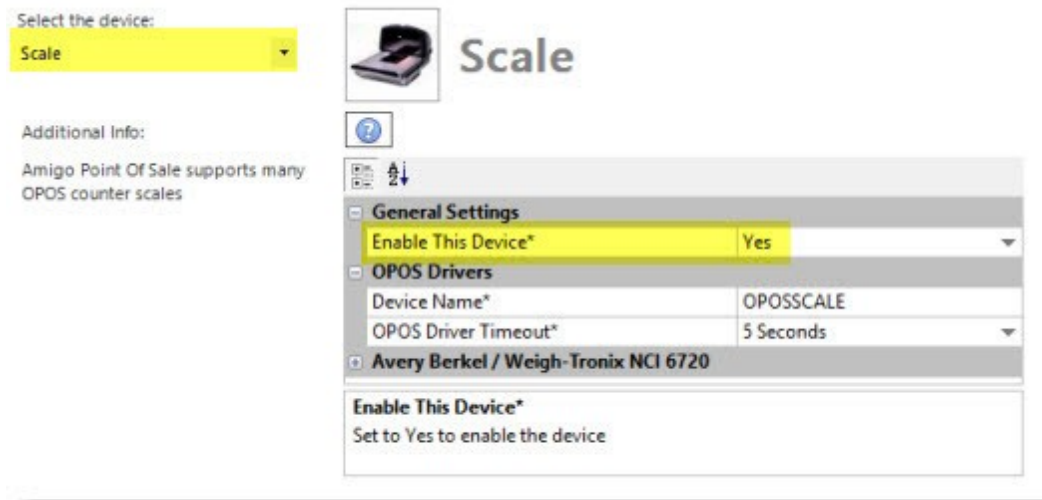


The screenshot shows the 'BULK ITEM WEIGHT ENTRY' screen. At the top, there are two buttons: 'SCALE WEIGHT' (orange with a circular arrow icon) and 'MANUAL ENTRY' (dark blue with a checkmark icon). The center of the screen displays '3.72 LB' in large white text. At the bottom, there are two buttons: a red button with a white 'X' icon and a green button with a white right-pointing arrow icon.

15.14.2 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 | Devices | 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

General Settings

Enable This Device* Yes

OPOS Drivers

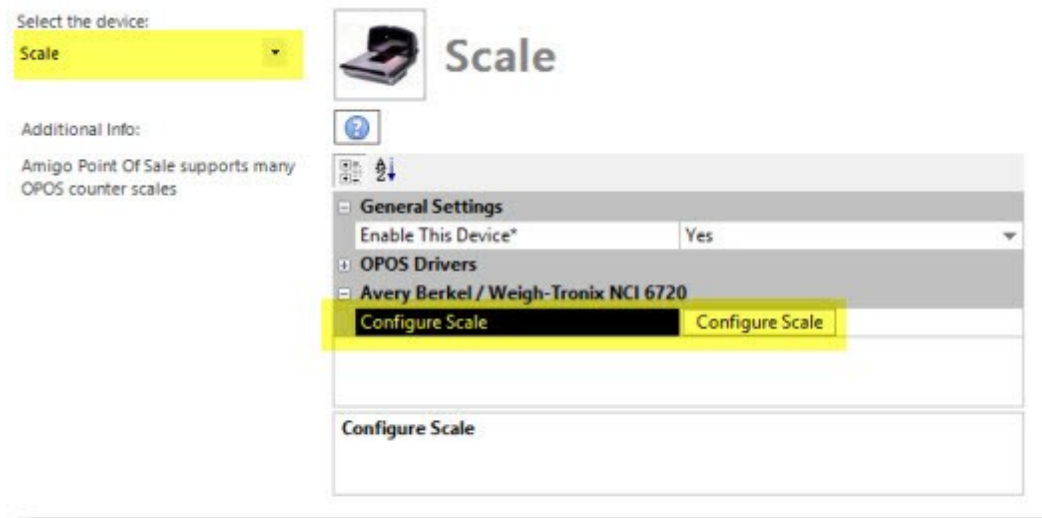
Device Name* OPOSSCALE

OPOS Driver Timeout* 5 Seconds

Avery Berkel / Weigh-Tronix NCI 6720

Enable This Device*
Set to Yes to enable the device

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 device:
Scale

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

Scale

General Settings

Enable This Device* Yes

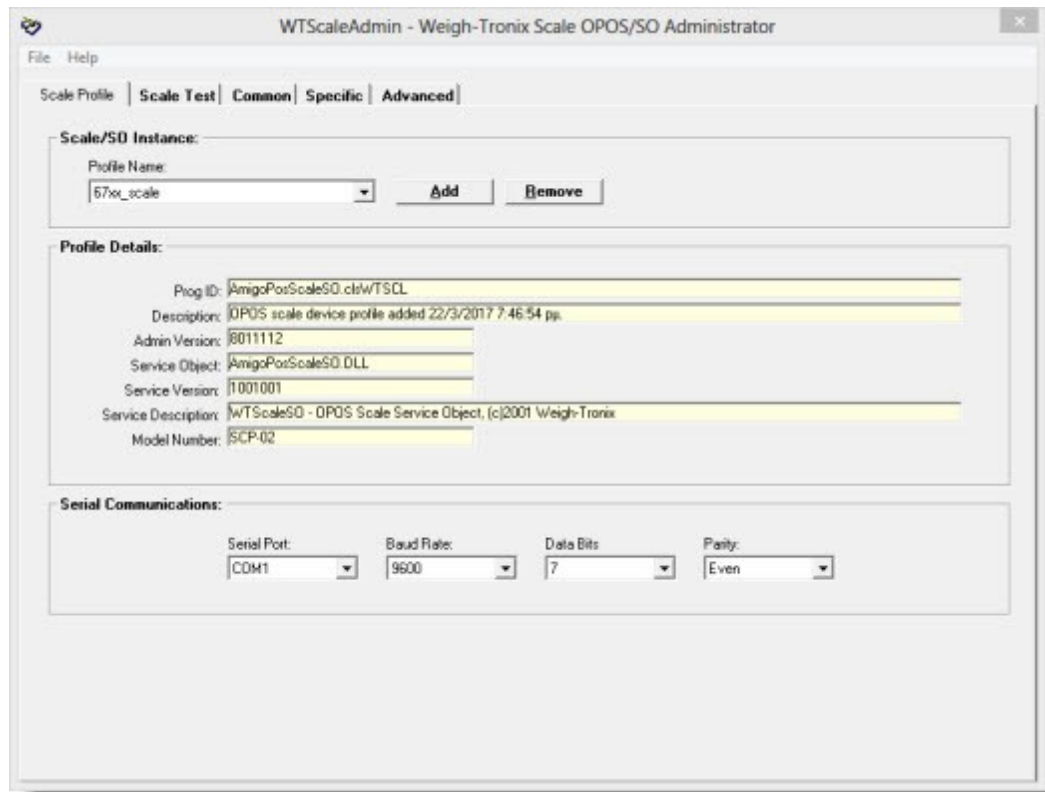
OPOS Drivers

Avery Berkel / Weigh-Tronix NCI 6720

Configure Scale Configure Scale

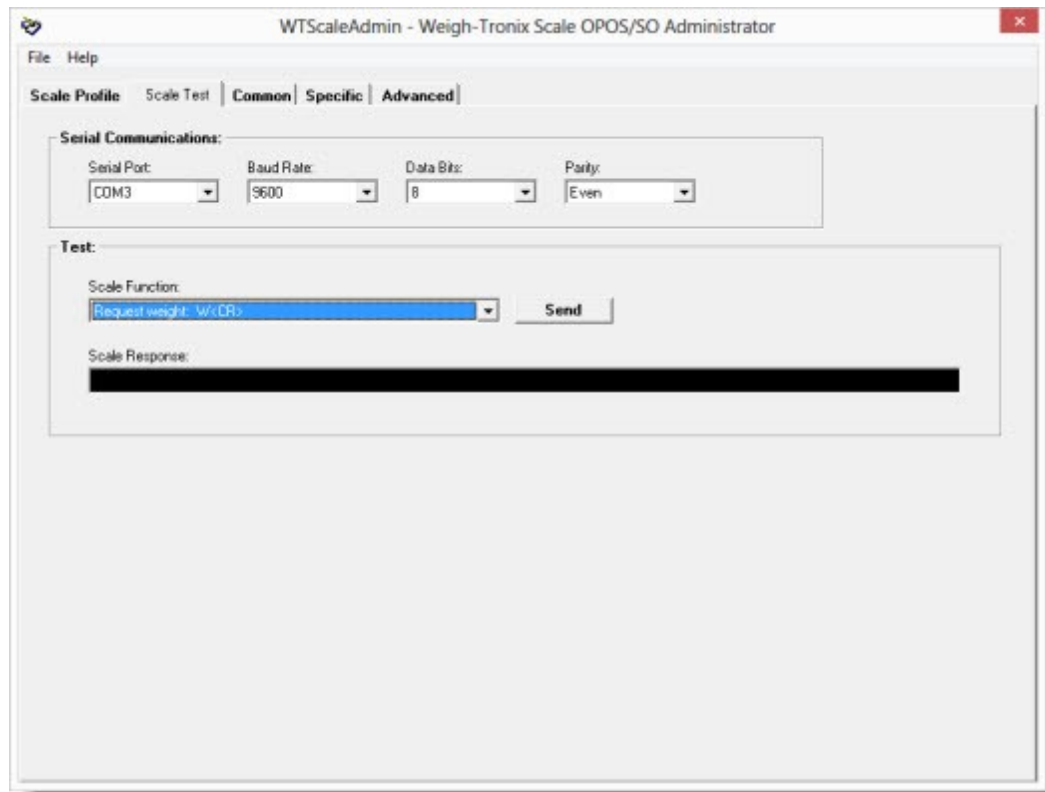
Configure Scale

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.



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:

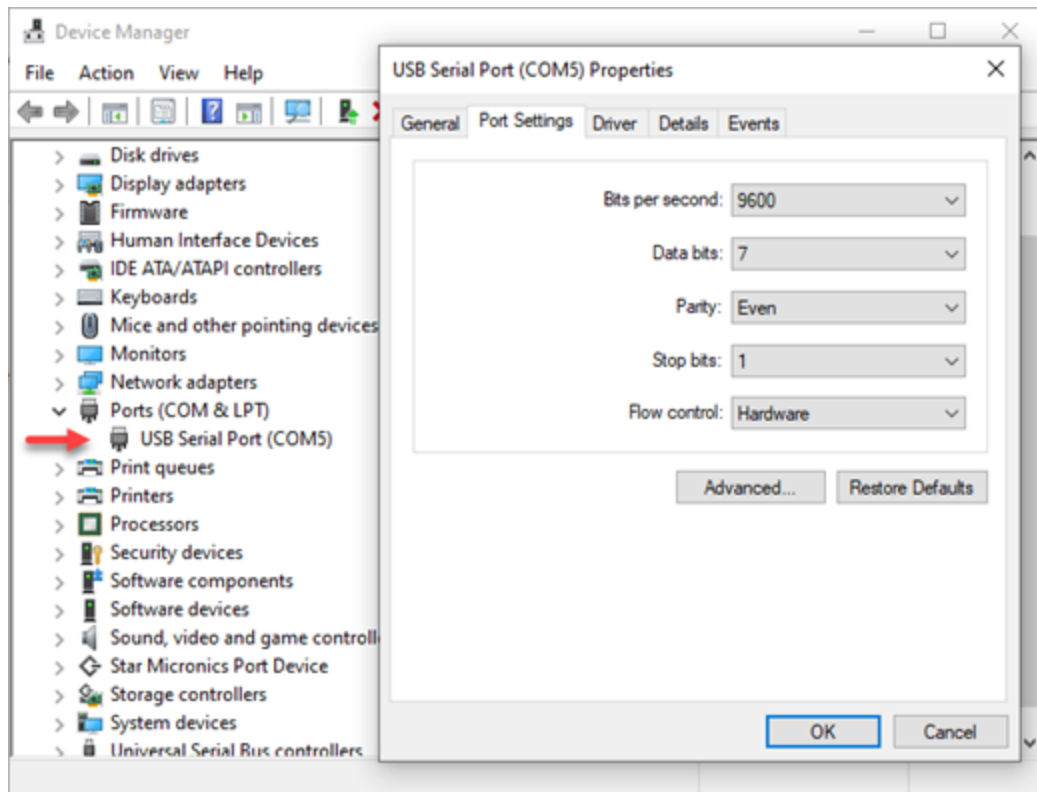
- Invalid serial port configuration in Windows Control Panel | Device Manager, including baud, parity, stop bits and handshaking.
- The OPOS device is already open by another application, i.e. the order entry screen scale entry box is open or a 3rd party OPOS configuration utility is open.
- The scale is not OPOS compliant or the scale DIP switches were changed from the default settings.



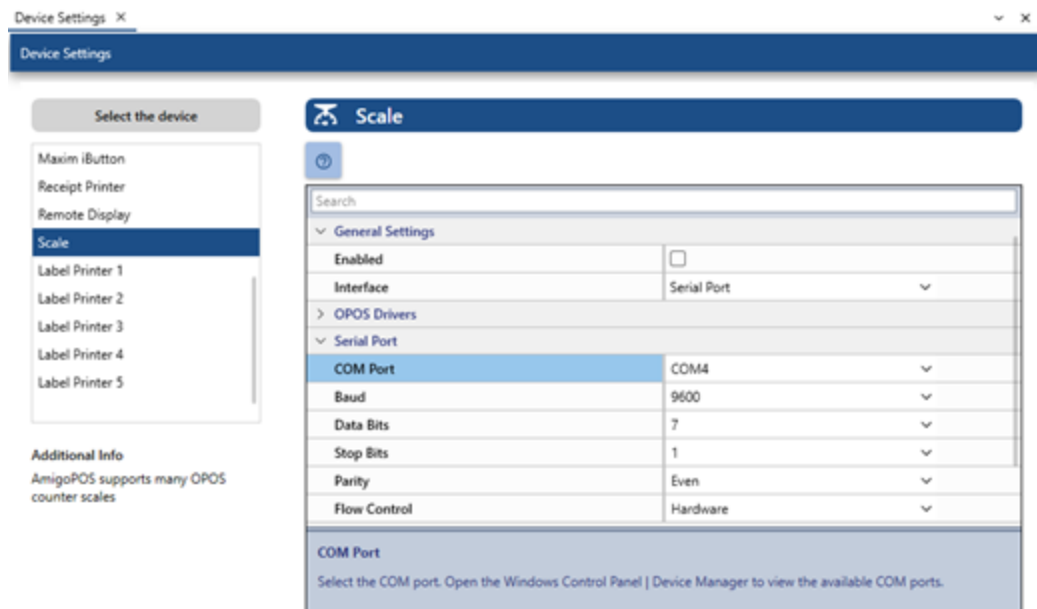
15.14.3 Serial Port Scales

AmigoPOS supports serial port scales that are compatible with the NCI protocol. Most scales can be programmed to use the NCI protocol, and many popular scales such as the CAS PD-II and Weigh-tronix 6720 use the NCI protocol by default. Refer to the scale's user manual for programming instructions. For example, the popular CAS PD-II scale should be set to use ECR-Type 5 emulation. Download a PDF document describing the NCI protocol [here](#).

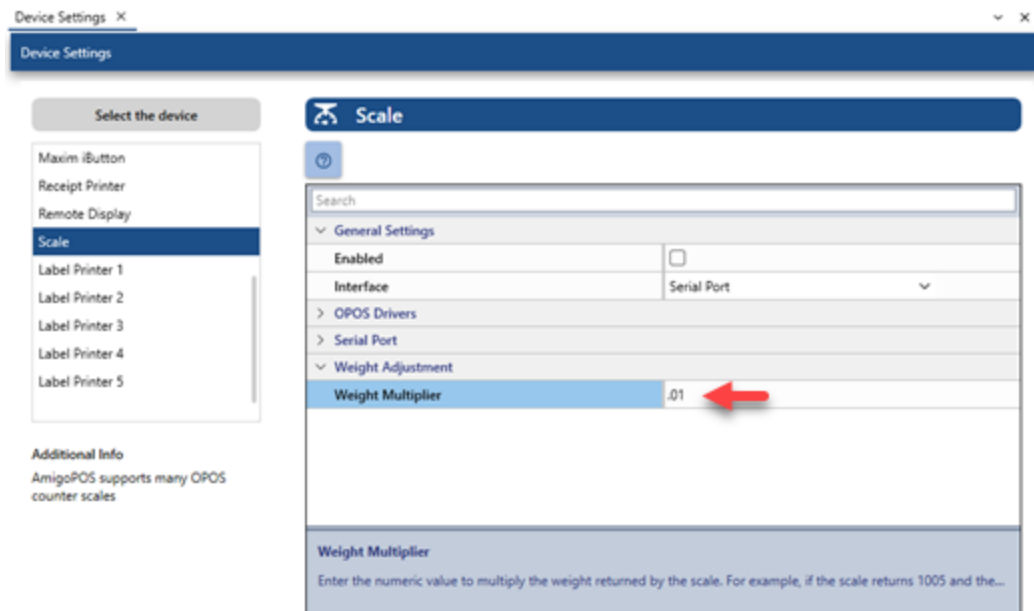
Open Windows Control Panel | Device Manager and double-click on the serial port to view the properties. Make a note of the port number and verify that the communication settings are set to 9600-7-E-1 with Hardware flow control.



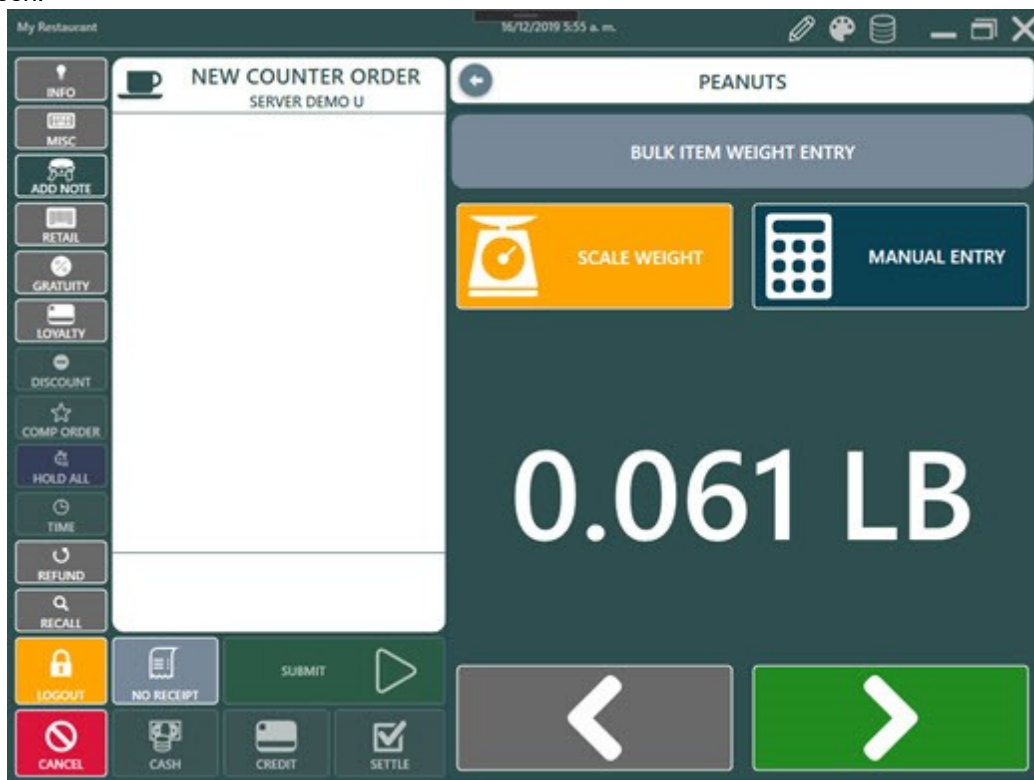
Open back office | settings | devices | scale, enable the scale, select Serial Port interface and select the correct port number. Set the serial port communication settings to 9600-7-E-1 with Hardware flow control.



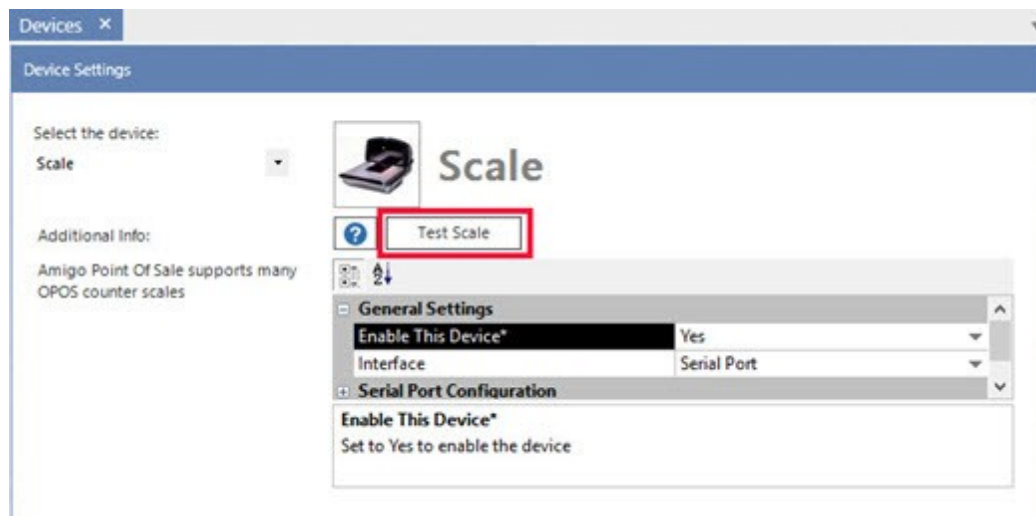
The weight value sent from the scale to the pos does not include the decimal point. The Weight Multiplier setting automatically inserts the decimal point when the weight is received at the pos. For example, if the scale readout displays 10.05 KG and the weight received at the pos is 01005 and the weight multiplier should be set to .01 (or ,01 in regions where a comma decimal separator is used).



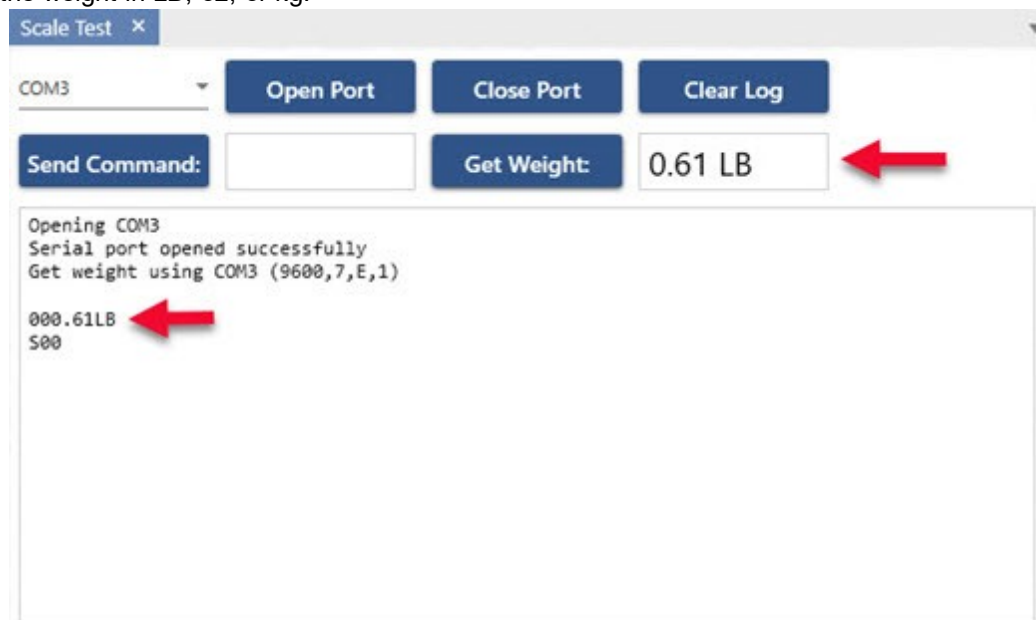
Run the pos, start a new order, add a [bulk weight item](#) ⁶²⁰ and verify that the correct weight is displayed on screen.



A test utility is provided in back office in order to verify that the scale is using the correct protocol. Open the scale settings screen and click Test Scale to open the utility. Verify that the pos is not running because 2 applications cannot access the same port simultaneously.



The example below displays the weight from a scale using the NCI protocol. Note that the scale may return the weight in LB, oz, or kg.

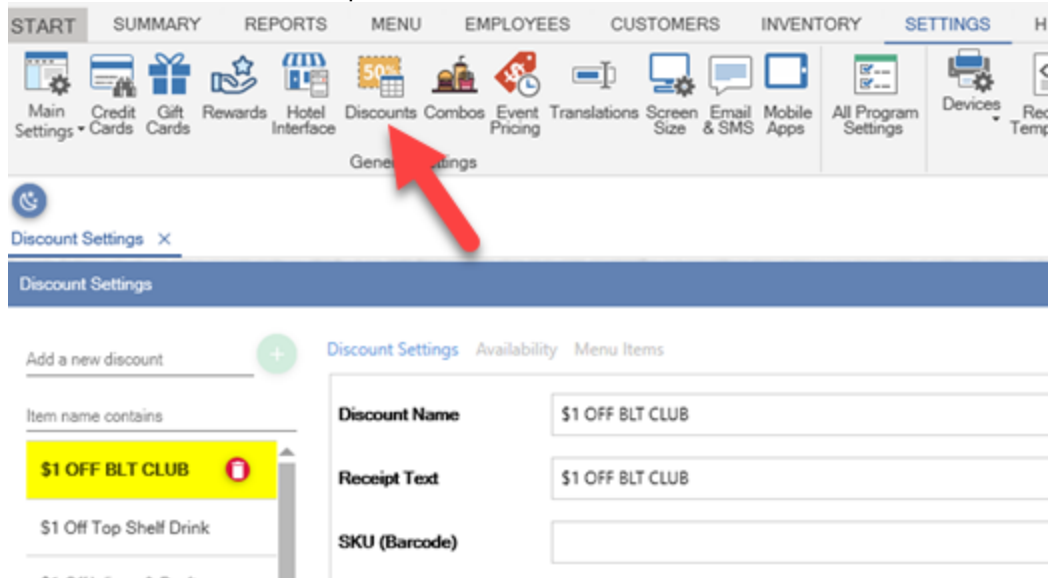


Discounts

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](#)^[558], [bar menu special pricing](#)^[603] and [event pricing](#)^[840] 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 discounts, where the customer is required to purchase multiple items to receive a discount.

Open the discounts editor in Back Office | Settings | Discounts. All discount definitions and corresponding menu item assignments are managed on this screen. Review the following introductory text before entering new discounts. This article contains the following topics:

- [Entering a New Discount](#)^[408]
- [Menu Item\Category Assignments](#)^[411]

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

Enter a name for the new discount on the top line and click the green button to save the new discount and display the settings.

The screenshot shows the 'Discount Settings' window. The left pane lists various discounts, with '\$1 OFF BLT CLUB' highlighted in yellow. The right pane shows the configuration for this discount:

- Discount Name:** \$1 OFF BLT CLUB
- Receipt Text:** \$1 OFF BLT CLUB
- SKU (Barcode):** (empty field)
- Hide:** ☐
- Assign Menu Items:** ☒
- Deduct Before Tax:** ☒
- Automatic:** ☐
- Calculation:** Fixed
- Amount:** \$1.00
- Items Per Order:** 3
- Order Minimum:** \$0.00
- Exclude Bar Menu:** ☐
- Allow Other Discounts:** ☒
- Order Type:** All Order Types

A 'Save' button is located at the bottom right of the configuration panel.

The following settings are available:

- **Discount Name:** Enter a short name to appear on the order entry screen discount button
- **Receipt Text:** Enter a short name to print on the customer receipt
- **SKU (Barcode):** Enter the unique barcode that is used to identify a paper coupon or the QR code in the mobile phone rewards app.
- **Hide:** Check the box to prevent the discount from appearing on the order entry screen
- **Automatic: Described below**
- **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. whole numbers for percentage amounts; i.e. 50 = 50% off

- **Menu Item Assignment:** Check the box if this discount is applied only to specific menu items or categories
- **Deduct Before Tax:** When Menu Item Assignment is enabled, check the box to apply the discount as a line item so that the order item price is discounted before the tax is calculated
- **Exclude Bar Items:** Check the box to exclude the bar menu subtotal when calculating the percentage discount (available only for percentage by order discounts)
- **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:** Check the box if this discount can be applied to an order that already has other discounts applied

Automatic Discounts

- Check the box next to Automatic if the discount should 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](#)⁴³³; users with job types that have the Allow Discounts permission disabled will not be able to access the discounts list on the order entry screen but the discount will still be applied automatically.

Availability

Discount Settings

Add a new discount +

Discount Settings Availability Menu Items

Item name contains

\$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

20% Seafood Entrée

Start Date 1/1/2018

End Date 1/1/2022

Restrict Time ☐

Sunday ☒

Monday ☒

Tuesday ☒

Wednesday ☒

Thursday ☒

Friday ☒

Saturday ☒

Save

The following settings are available:

- **Start Date:** Enter or select the date that this discount becomes active.
- **End Date:** Enter or select the date that this discount expires.
- **Restrict Time:** Check the box to limit the discount's available hours.
- **Start Time On:** Enter the time that this discount becomes active. If this discount is always active, enter the same value for both the start and end times.
- **Time Off:** Enter the time that this discount becomes inactive.
- **Sunday - Saturday:** Check the box 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, check the Menu Item Assignment field box to enable the Menu Items tab. Click the green button to add a new menu item assignment. 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 Menu type and Menu Categories item type to display the list of regular menu categories. Click Save to commit the changes to the database.

Discount Settings

Add a new discount +

Discount Settings Availability Menu Items

Item name contains

- \$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
- 20% Off Seafood Entrée

Menu Category

WINGS (\$0.50)

Menu Category

DRAFT BEER (\$0.50)

Menu Type

Regular Menu

Item Type

Menu Category

Menu Category

WINGS

Amount

\$0.50

Save

The following fields are available on the discount assignments editor:

- **Menu Type:** Specify whether the assignment is for the regular or bar menu
- **Item Type:** Specify whether it is a menu item or menu category
- **Item:** The alphabetical list of items shown in this field is determined by the selections in the preceding fields
- **Amount:** When the discount calculation is a fixed amount and more than one menu item assignment is defined, the sum of the amount of all items must equal the discount amount. If there is only one menu item assignment, the amount defaults to the amount of the discount.
- **Include Modifiers:** When the discount calculation is based on percentage, specify whether to include the price of the order item's modifiers in the price before calculating the discount amount.

16.2 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**, enter **\$1 Off Wings & Draft** and click the green button to save the new discount.

2. Set the following values:

Amount: \$1.00

Assign Menu Items: Yes

Deduct Before Tax: Yes

Calculation: Fixed

Items Per Order: 5

Discount Settings

Add a new discount

+

Discount Settings
Availability
Menu Items

Item name contains

\$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

20% Seafood Entrée

Burger, Fries + Drink Cbo

Buy 3 Clubs Get \$1 Off

Buy 3 Get \$2.00 Off

Free Well Drink

Half Off any Burger

Discount Name

\$1 Off Wings & Draft

Receipt Text

\$1 Off Wings & Draft Beer

SKU (Barcode)

Hide

☐

Assign Menu Items

☒

Deduct Before Tax

☒

Automatic

☐

Calculation

Fixed

Amount

\$1.00

Items Per Order

5

Order Minimum

\$0.00

Exclude Bar Menu

☐

Allow Other Discounts

☒

Order Type

All Order Types

Save

3. Click the Menu Items tab and click the green button to add the Wings menu item assignment. Select the following values and click Save.

Menu Type: Regular Menu

Item Type: Menu Category

Menu Category: Wings

Amount: \$0.50

Discount Settings

Add a new discount

Discount Settings
Availability
Menu Items

Item name contains

\$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

Menu Category
WINGS (\$0.50)

Menu Category
DRAFT BEER (\$0.50)

Menu Type
Regular Menu

Item Type
Menu Category

Menu Category
WINGS

Amount
\$0.50

Save

4. Click Add New from the drop-down list again to add the Draft Beer menu category assignment and set the following values and click Save.

- **Menu Type:** Bar Menu
- **Item Type:** Menu Category
- **Bar Menu Category:** Draft Beer
- **Amount:** \$0.50

Discount Settings

Add a new discount

Discount Settings
Availability
Menu Items

Item name contains

\$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

Menu Category
WINGS (\$0.50)

Menu Category
DRAFT BEER (\$0.50)

Menu Type
Bar Menu

Item Type
Menu Category

Bar Menu Category
DRAFT BEER

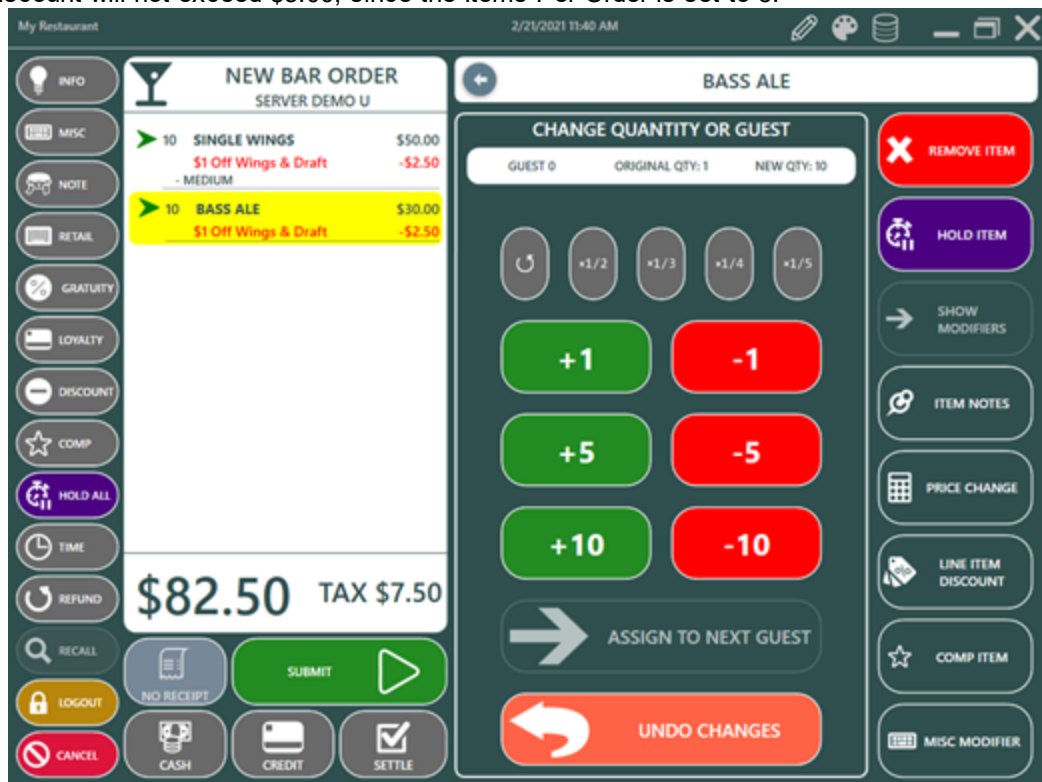
Amount
\$0.50

Save

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. If the discount is set to Automatic, no user action is required to apply the discount. 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.



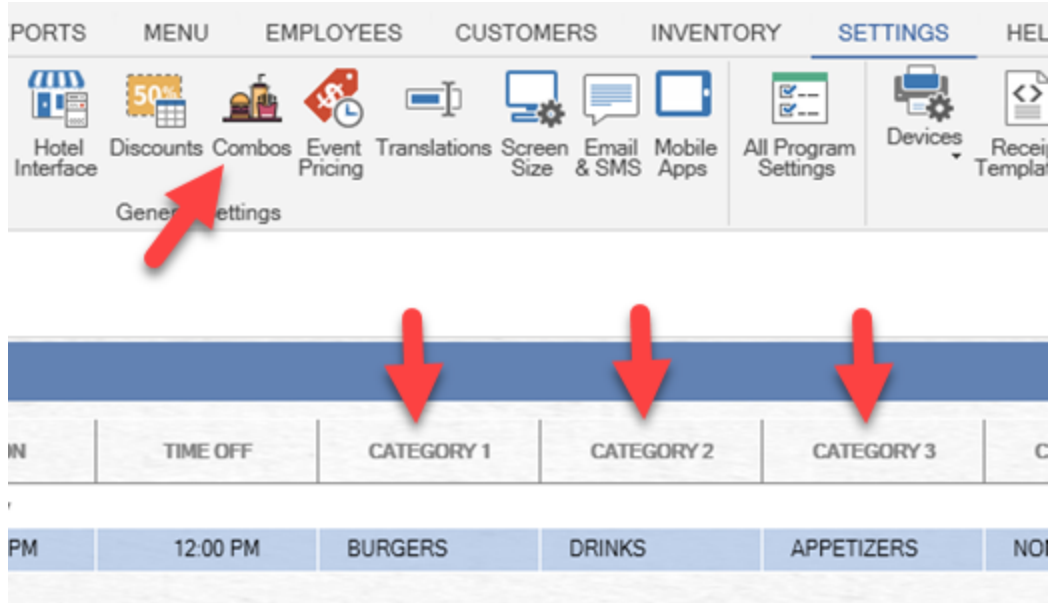
Change the quantity of both the chicken wings and draft beer to 15 and note that in the 2nd image the total discount will not exceed \$5.00, since the Items Per Order is set to 5.



16.3 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](#) ^[554].

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	CATEGORY 1
+ Click here to add a new row						
	COMBO 1 DISCOUNT	\$5.00	1/1/2019	12:00 PM	12:00 PM	BURGERS

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 Button Special Pricing Modifiers Inventory Web Orders

General Settings

Pricing

Price	2.25
Tax Rate	10% [ID:1/SALES TAX]
Container Charge	0
Bottle Deposit	0
Revenue Center	FOOD
SKU	0
Time Based Pricing	<input type="checkbox"/>
Time Interval	MINUTE
Retail Inventory	Add Inventory Item
PLU	0
Sold By Weight	<input type="checkbox"/>
Price By Weight Multiplier	1
Price By Weight Suffix	
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"/>

Exclude From Combos

If checked, item will be ignored when calculating combo pricing, even when the item has a combo definition that is in effect. For example, a combo that includes all items from the Pizza

Menu Items List

REGULAR MENU

Price Columns Printers Columns Appearance Columns Availability

ID	ITEM NAME	EXCLUDE FROM DISCOUNTS	EXCLUDE FROM COMBOS	LOYALTY POINT VALUE	LOYALTY RED
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 checked="" type="checkbox"/>	0	
BREAKFAST - 11 Menu Items					
286	BACON & CHEESE OMEL	<input type="checkbox"/>	<input type="checkbox"/>	0	
251	BACON AND EGGS	<input type="checkbox"/>	<input type="checkbox"/>	0	
257	BLUEBERRY OATMEAL	<input type="checkbox"/>	<input type="checkbox"/>	0	
280	BLUEBERRY PANCAKES	<input type="checkbox"/>	<input type="checkbox"/>	0	
284	BROCCOLI OMELETE	<input type="checkbox"/>	<input type="checkbox"/>	0	
277	FRENCH TOAST	<input type="checkbox"/>	<input type="checkbox"/>	0	
275	HAM AND EGGS	<input type="checkbox"/>	<input type="checkbox"/>	0	
278	PANCAKES	<input type="checkbox"/>	<input type="checkbox"/>	0	
249	PANCAKES AND BACON	<input type="checkbox"/>	<input type="checkbox"/>	0	
282	PLAIN OMELETE	<input type="checkbox"/>	<input type="checkbox"/>	0	

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.

Order Entry Screen Settings	
Order Entry Screen Retail Removed Items Void Reasons Refund Reasons Age Verification Word Filters	
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	
Bar Menu Settings	
Manual Discount Text	
Name to use when user enters a manual discount amount	

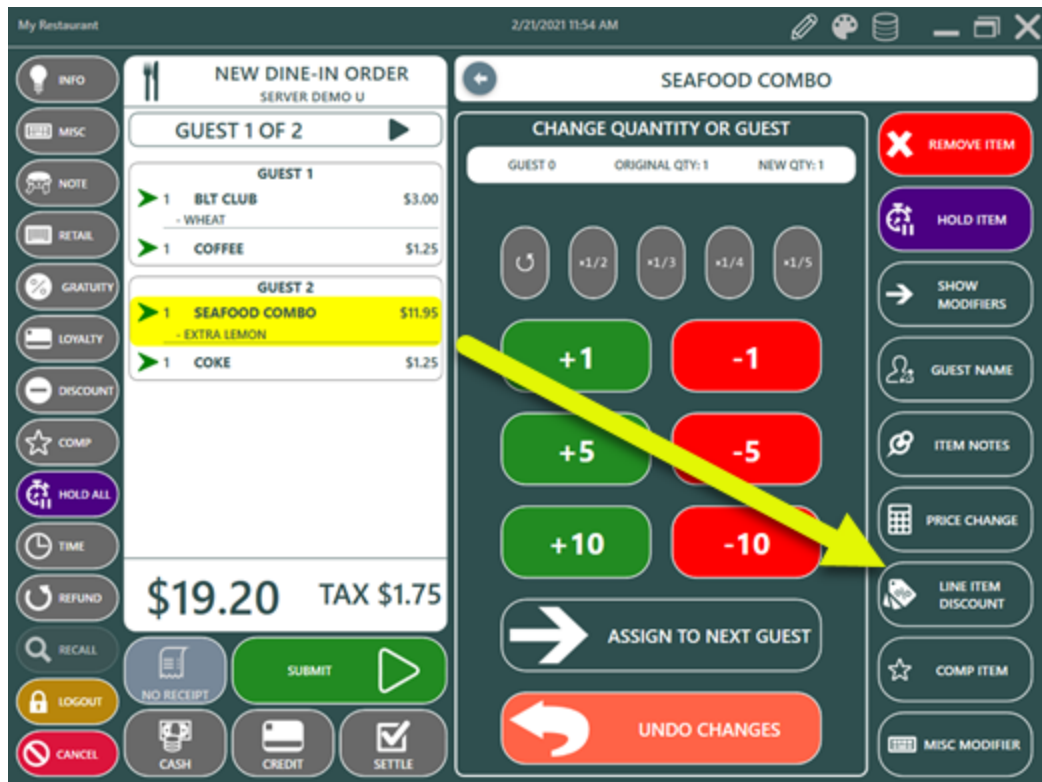
The line item discount is printed immediately below the order item and above the modifiers on the customer receipt. The text can be customized in **Back Office | Settings | Devices | Receipt printer | Custom Text**. Note that the text is prefixed with the value and percent symbol for percentage line item discounts.

```

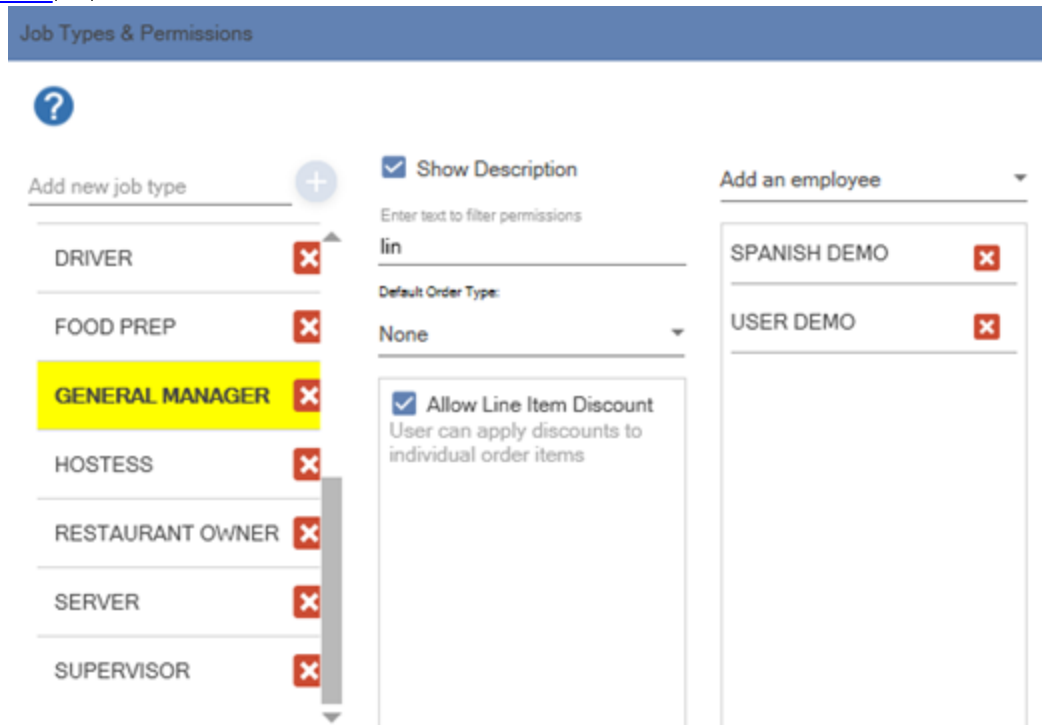
-- GUEST 2 --

SMALL CH & PEP      8.50
50% DISCOUNT     -7.75
GREEN PEPPER       2.00
HAM                2.50
HAMBURGER          2.50
ROOT BEER          1.25
    
```

To apply a line item discount, select any item on the order and press LINE ITEM DISCOUNT at the bottom right.

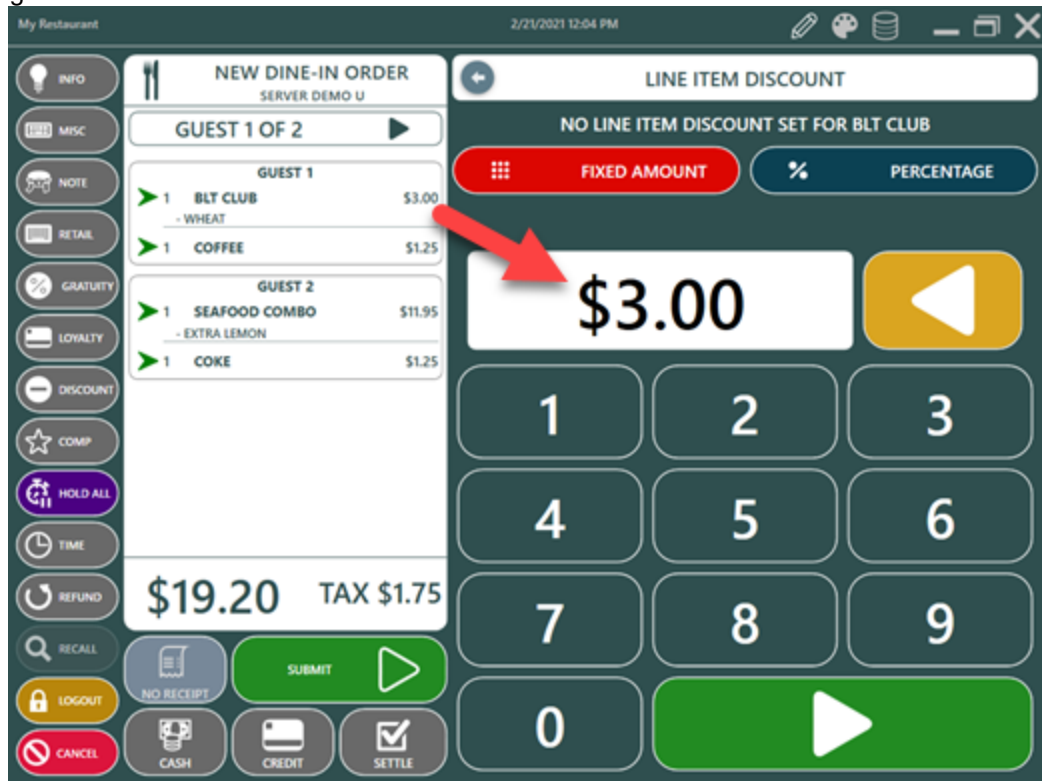


The button is disabled if the logged in user's job type does not have the Allow Line Item Discount [permission](#) ⁴³³ enabled.

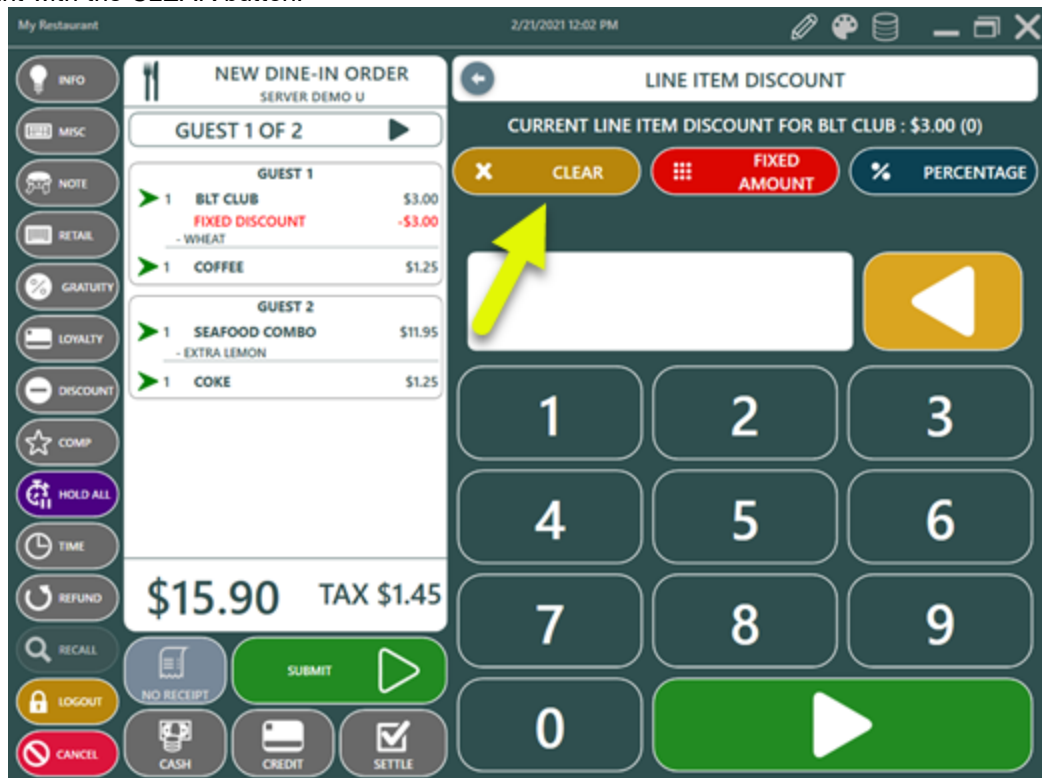


Select the discount type and enter the amount. The fixed discount amount cannot exceed the price of the order item and the percentage discount cannot exceed 100%. In the example below, the user attempts to enter a \$5.00 fixed discount and the value is automatically decreased to \$3.95, the

maximum value allowed. The percentage discount is automatically recalculated if the order item quantity is changed.



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.



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.

Manager Screen Settings X

Drawer Reset End Of Day **End of Day Reports** Special Events Revenue Centers

REPORT NAME	BUTTON POSITION	AUTO PRINT	HIDE BUTTON
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 (ACTUAL)	7	<input type="checkbox"/>	<input checked="" 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"/>
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"/>
REFUNDS	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>

My Restaurant 2/21/2021 12:06 PM

MINI REPORTS

CASH DRAWERS

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

C:\ PROMPT

Notepad ++

On-Screen Keyboard

SHUT DOWN

FINISHED

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

LINE ITEM DISCOUNTS
CURRENT BUSINESS DAY
2/21/2021 12:07:19 PM

ORDER# 2 BAR
SERVER: DEMO U
ITEM: DECAF TEA
TYPE: FIXED
AMOUNT: \$0.50

ORDER# 3 DINE-IN
SERVER: DEMO U
ITEM: BLT CLUB
TYPE: FIXED
AMOUNT: \$3.00

ORDER# 3 DINE-IN
SERVER: DEMO U
ITEM: Demo Version
TYPE: FIXED
AMOUNT: \$3.00

ORDER# 3 DINE-IN
SERVER: DEMO U
ITEM: SEAFOOD COMBO
TYPE: FIXED

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

PRICE CHANGES

REFUNDS

Email Settings

17 Email Settings

Customers can receive order updates by email directly from the pos and back office. Customers can also receive an email directly from the customer information screen before the order has been entered. In addition, end of day reports can be emailed automatically to one or more email addresses each time the end of day is run.

All emails are sent using AmigoPOS cloud services at no cost and the email service is automatically enabled for version 9 users.

Data Service Application Settings

Open the data service application and click the **Shared Settings** icon. Enter

<https://cloud.amigopos.com> in the url field and your amigopos.com username and password. Click Test Email and allow up to 30 seconds to receive the email.

The screenshot displays the 'AmigoPOS Data Service' application window with the 'Shared Settings' tab selected. At the top, there is a toggle for 'Start Data Service application manually'. Below this, the 'Cloud Service' section is active, showing instructions to login to amigopos.com and export cloud service settings. The 'Email' section notes that email service does not require a merchant id or store id. The form contains several input fields: 'Cloud Service Url' (containing 'https://cloud.amigopos.com'), 'Username (email used to login at amigopos.com)' (containing 'myrestaurant@gmail.com'), 'Password' (masked with dots), 'Merchant Id', and 'Store Id'. At the bottom, there are three buttons: 'Import Settings', 'Save and Test Settings', and 'Test Email'. A red arrow points to the 'Test Email' button. The bottom status bar shows the IP address 'ip: 192.168.1.2' and the version '9.3.80'.

Back Office Settings

Open back office | settings | main settings | general settings to set the business name and email.

- **Reply-To Email Address:** Enter the email address to use as the From and Reply-To email address.
- **Business Name:** The business name is used as the From Email Name when sending emails

AmigoPOS Back Office 9.3.80

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS INVENTORY SETTINGS HELP

Main Settings Credit Cards Gift Cards Hotel Interface Discounts Combos Event Pricing Translations All Program Settings Devices Receipt Templates

General Settings

0 Orders Settled | \$0.00 Since Last End Of Day

General Settings x

General Settings

Search

Pos Station Identifier

Station Id 1

Store Information

Business Name Demo Dine

Address 100 Queens Park

Address Line 2

City Toronto

Region ON

Postal Code M5S 2C6

Phone 111-222-3333

Email my@email.com

Report to

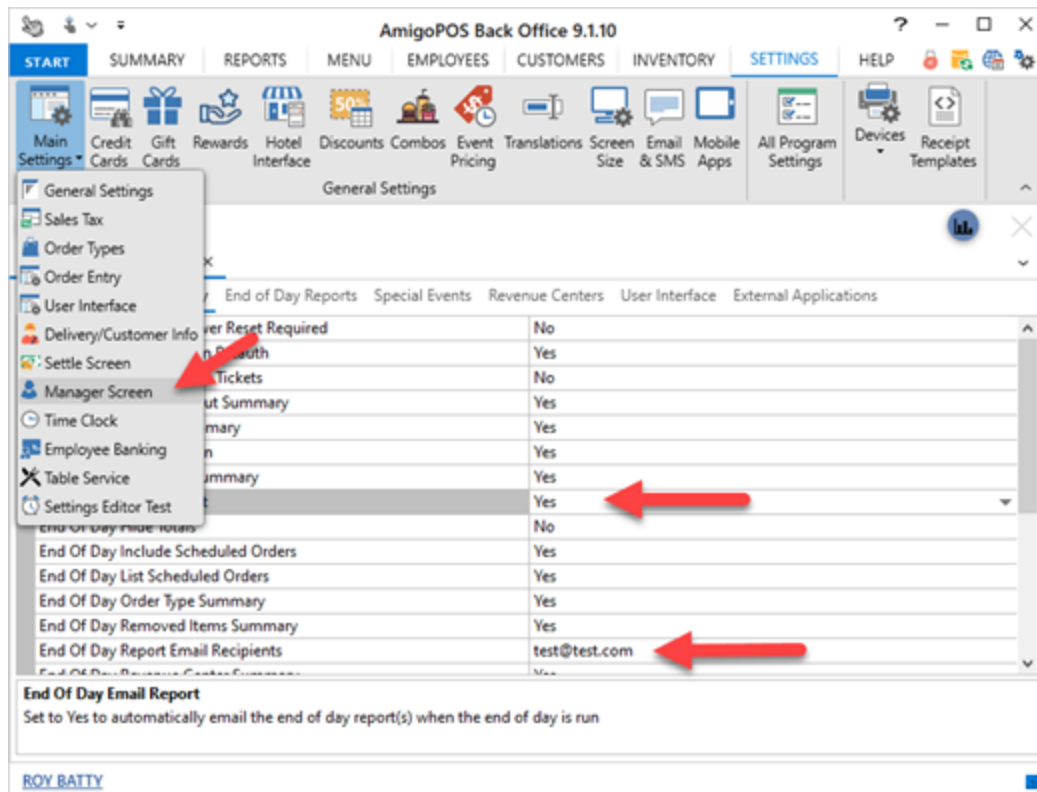
Business Name

Business name to appear on reports

ROY BATTY

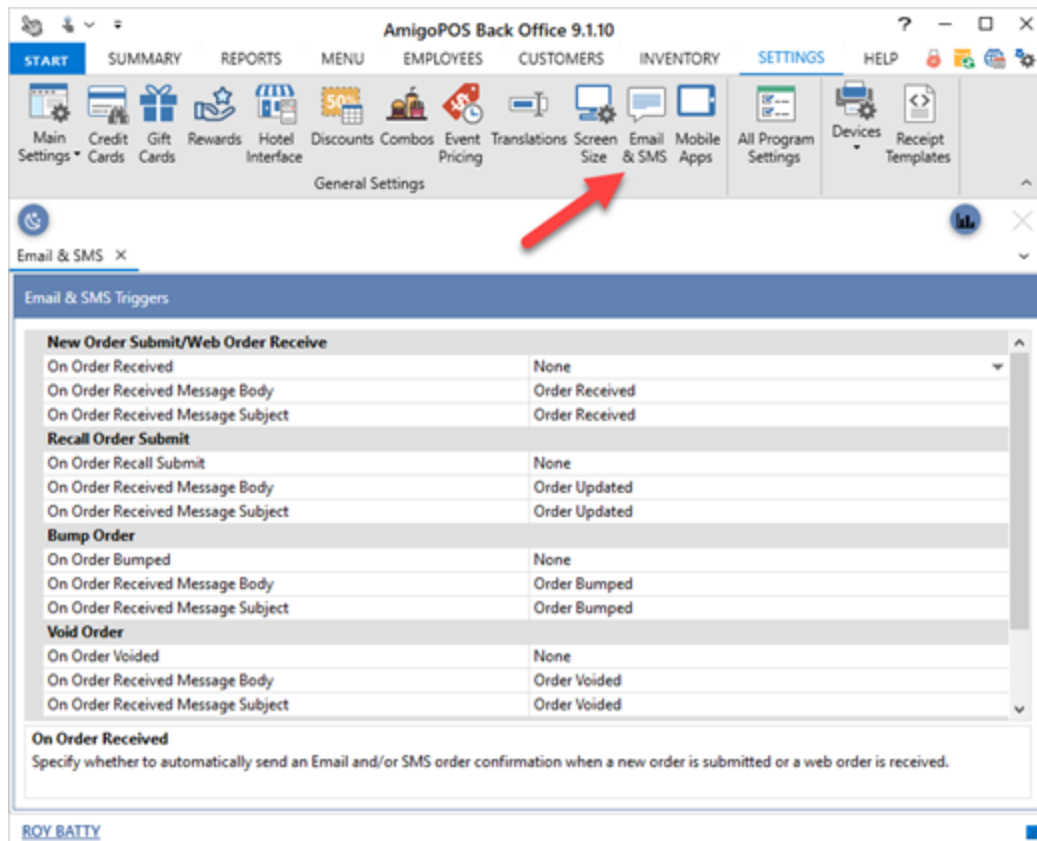
End Of Day Reports

An email that contains the [end of day](#) ²⁰⁵ report (and all other mini reports that are set to print when the end of day is run) can be sent automatically when the end of day is run by enabling the following settings. Separate emails by commas when using multiple destinations.



Triggers

Email triggers are used to automatically send the customer a plain text email when the selected order event occurs. Email triggers have no effect if the customer's email address is not entered on the customer information screen. Note that all web order customer emails are known by default.



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 or by pressing the order entry screen INFO button and specifying the customer.

Demo Diner

CUSTOMER INFORMATION

Wall Street Building FIRST NAME

USE PRIMARY ADDRESS ☒ USE ALTERNATE ADDRESS*

STREET NUMBER 1 STREET Wall Street

ADDRESS LINE 2

CITY New York REGION NY POSTAL CODE 10005

DISTANCE 5.1 mi / 19 mins

NOTES knock on the side or rear door and beep the horn twice

EMAIL wallstreet@amigopos.com

TAX STATUS TAXABLE ☒ TAX EXEMPT

CANCEL CHANGE SUMMARY ORDERS LOYALTY REWARDS ACCOUNT ROUTE MAP EMAIL BLOCK CONTINUE

Press the EMAIL button to open the editor, enter the subject and message using the on-screen keyboard and press the green SEND EMAIL button to send the message.

Demio Diner

CUSTOMER INFORMATION

SEND EMAIL

RECIPIENT wallstreet@amigopos.com

SUBJECT

MESSAGE

CANCEL SEND EMAIL

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 > . ,

→

A small notification appears at the top center to indicate the status of the email message. Note that if the cloud service does not respond 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.

Demio Diner

Wall Street Building

USE PRIMARY ADDRESS USE ALTERNATE ADDRESS*

STREET NUMBER 1 STREET Wall Street

ADDRESS LINE 2

CITY New York REGION NY POSTAL CODE 10005

DISTANCE 5.1 mi / 19 mins

NOTES knock on the side or rear door and beep the horn twice

EMAIL test@amigopos.com

TAX STATUS TAXABLE TAX EXEMPT

CANCEL CHANGE SUMMARY ORDERS LOYALTY REWARDS ACCOUNT ROUTE MAP EMAIL BLOCK CONTINUE

Employees

18 Employees

18.1 Employee Management

AmigoPOS groups employees by job type, as defined on the [Jobs & Permissions](#)^[433] screen. All employees are assigned a default permission and may have [multiple permissions](#)^[436] assigned. Mandatory [time clock](#)^[437] in is recommended for employees with multiple jobs. Refer to the [next topic](#)^[433] for a description of jobs and permissions.

To add a new employee, open the employee editor in Back Office | Employees | Employees List, 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 | **Jobs & Permissions**. 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](#)^[455] topic for a description of the wage fields.

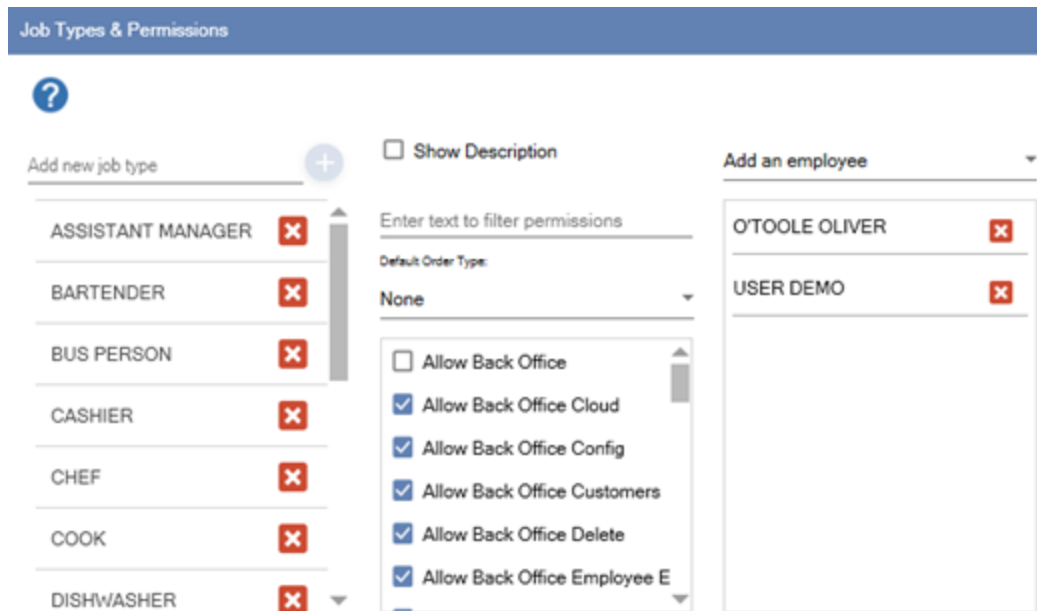
The screenshot shows the 'Employees' interface. On the left, a list of employees is shown, with 'SPANISH DEMO' highlighted in yellow. A red arrow points from the '+' icon next to 'SPANISH DEMO' to the 'Jobs' tab in the main panel. The 'Jobs' tab is active and shows a list of jobs for the selected employee. The jobs listed are 'ASSISTANT MANAGER', 'GENERAL MANAGER', and 'DRIVER'. Each job entry has a 'Pay Type' of 'Hourly' and a 'Pay Rate' of '\$0.00 Per Hour'. There are 'Add/Edit' and 'Default' buttons for each job. The 'GENERAL MANAGER' and 'DRIVER' jobs have a red 'X' icon in the top right corner.

In addition to the permissions list, the employee information editor includes 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.
- **Login Id:** The numeric login id used when logging in using the on-screen keypad
- **Time Clock Mandatory:** Force the user to clock in after logging in the first time
- **User Name:** Used when using user name/password login only
- **Login Password:** Used when using user name/password login only
- **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](#)^[472] topic for additional information.
- **Pay Rate:** The actual pay rate for the employee (overrides the value specified in the Jobs list)

18.2 Jobs & Permissions

Employee jobs can be used to prevent an employee from accessing most pos and back office functions. Restrictions are assigned based on a user's job and are accessible in Back Office | Employees | **Jobs & Permissions**. 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 customer 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 Customer Accounts:** Allow users access to the customer 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)

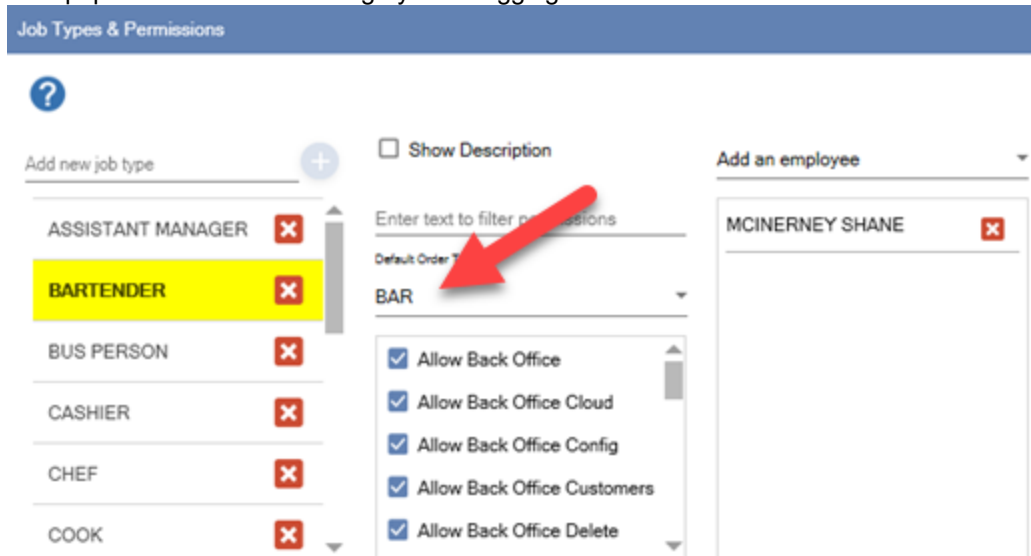
Manager System: Allow users to access the system button on the manager screen (Allow Manager permission required)

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.



18.3 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.

Employees

All Job Types

Employee name contains

☒ Hide Inactive Employees

DORMAN NORMAN

HAYWITH RITA

MCINERNEY SHANE

O'TOOLE OLIVER

SPANISH DEMO

USER DEMO

Main Settings Jobs Time Sheet Schedule Activity

Identification

Display Language

Login

Contact Information

Demographics

Timeclock Preferences

Time Clock Mandatory ☒

Date Hired 08/08/2006

Released ☐

Date Released 22/02/2021

Time Clock Mandatory

Check the box to force the user 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](#)^[455] topic for a description of the wage fields.

Employees

BARTENDER

Employee name contains

☒ Hide Inactive Employees

DORMAN NORMAN

HAYWITH RITA

MCINERNEY SHANE

O'TOOLE OLIVER

SPANISH DEMO

USER DEMO

Jobs Time Sheet Schedule Activity

Add/Edit

ASSISTANT MANAGER ☐ Default

Hourly Pay: \$0.00

GENERAL MANAGER Default Permission

Pay Type: Hourly Pay Rate: \$0.00 Per Hour

DRIVER

Pay Type: Hourly Pay Rate: \$0.00 Per Hour

18.4 Time Clock

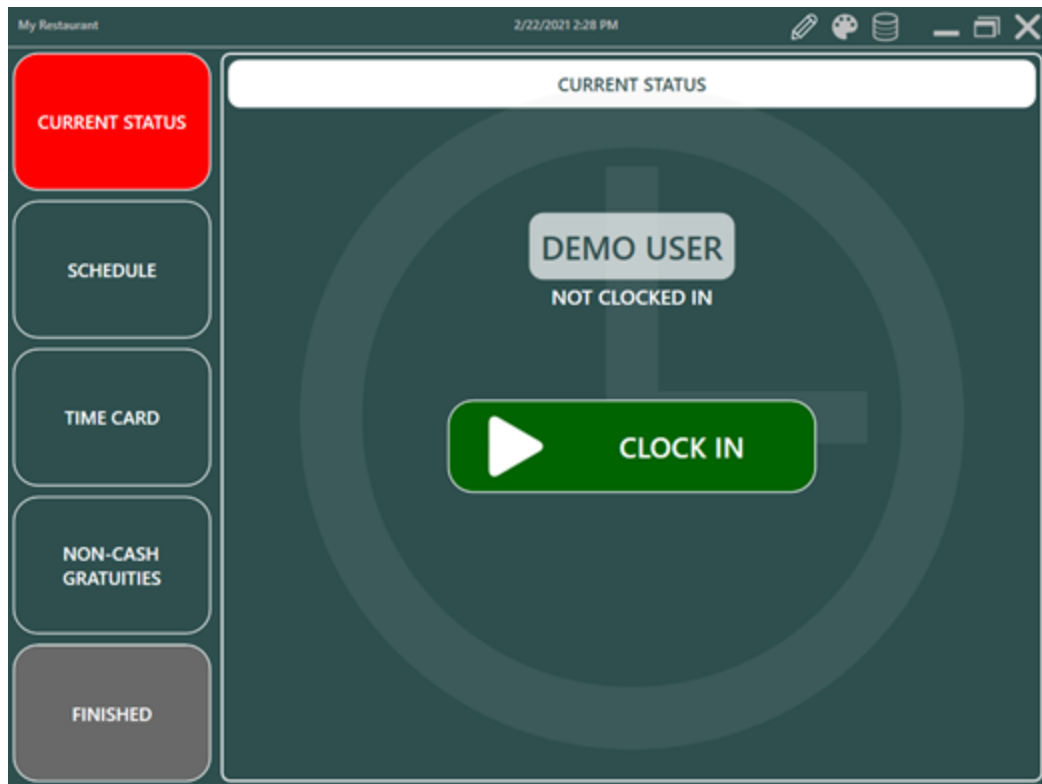
AmigoPOS includes the ability to restrict users from accessing the system until the user is clock-in. In addition, the user may be required to select a job (when [Multiple Jobs](#)^[436] are used) or to select a cash drawer (when multiple [cash drawers](#)^[323] are used). Most time clock settings are 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
Prevent Open Tickets Clock Out	No
Print Clock Out Bank Report	Yes
Tips Declaration Percentage	15
Allow Cash Drawer Change Allow users to change drawer assignment in the middle of a shift	

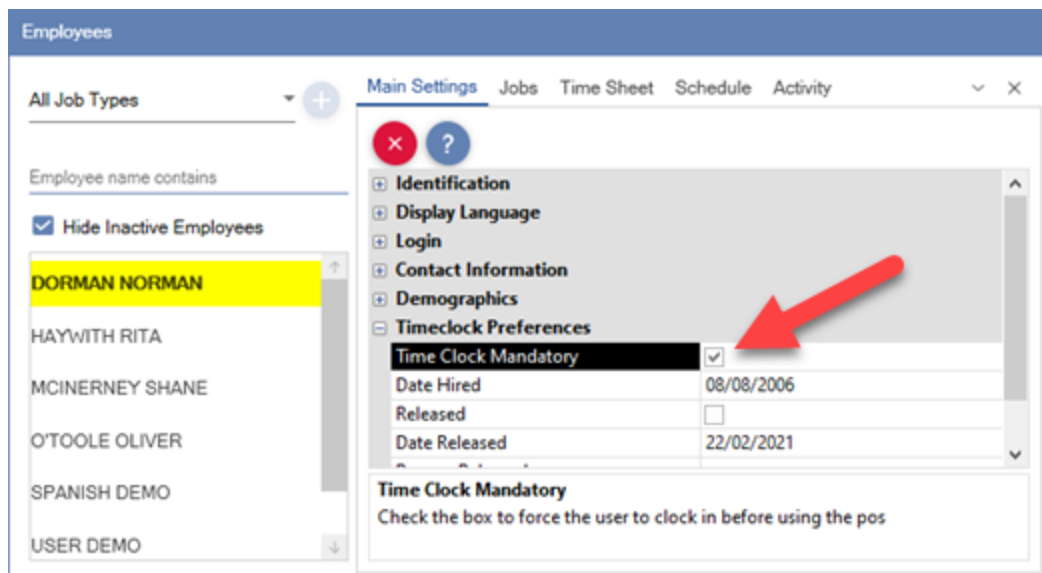
The following settings are available on the All Program Settings screen:

- 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
- 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.



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](#).⁴³²



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](#).⁴³³

Job Types & Permissions

?

Add new job type +

- CHEF ✕
- COOK ✕
- DISHWASHER ✕
- DRIVER** ✕
- FOOD PREP ✕
- GENERAL MANAGER ✕

☐ Show Description

Enter text to filter permissions

Default Order Type: None

- ☒ Seating Chart Designer
- ☒ Show Back Office Start Screer
- ☒ Show Back Office Status Bar
- ☐ Store
- ☒ Time Clock Only

Add an employee ▼

- SPANISH DEMO ✕
- DORMAN NORMAN ✕

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.

My Restaurant 2/22/2021 2:30 PM

CURRENT STATUS

CURRENT STATUS

SCHEDULE

TIME CARD

NON-CASH GRATUITIES

FINISHED

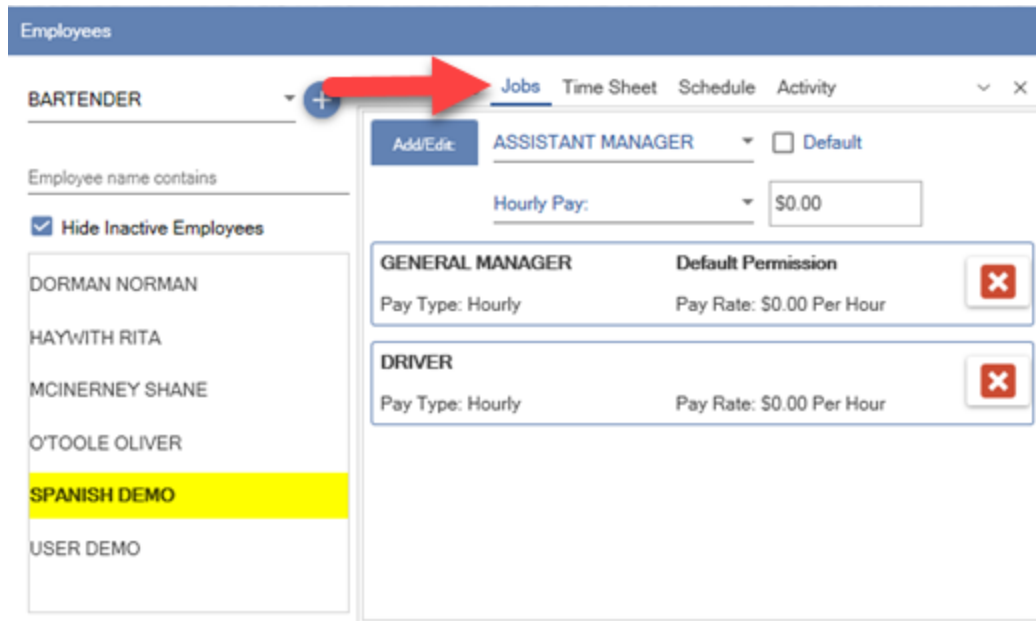
SELECT THE JOB TYPE TO CLOCK IN

GENERAL MANAGER

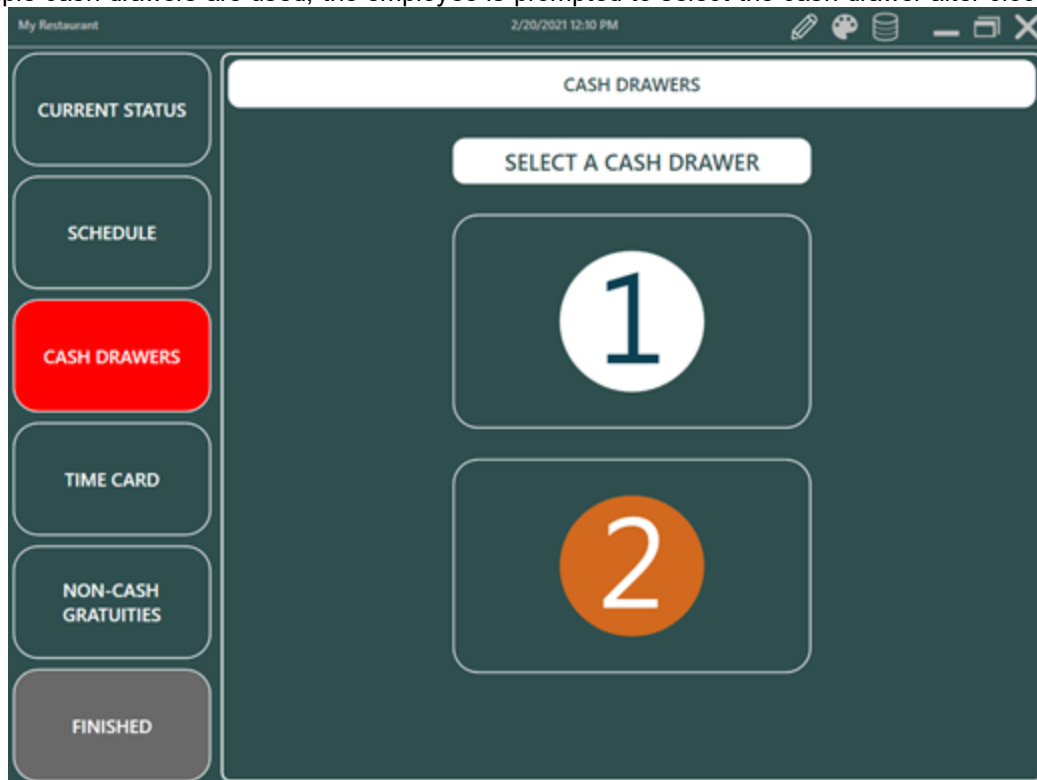
SERVER

CANCEL

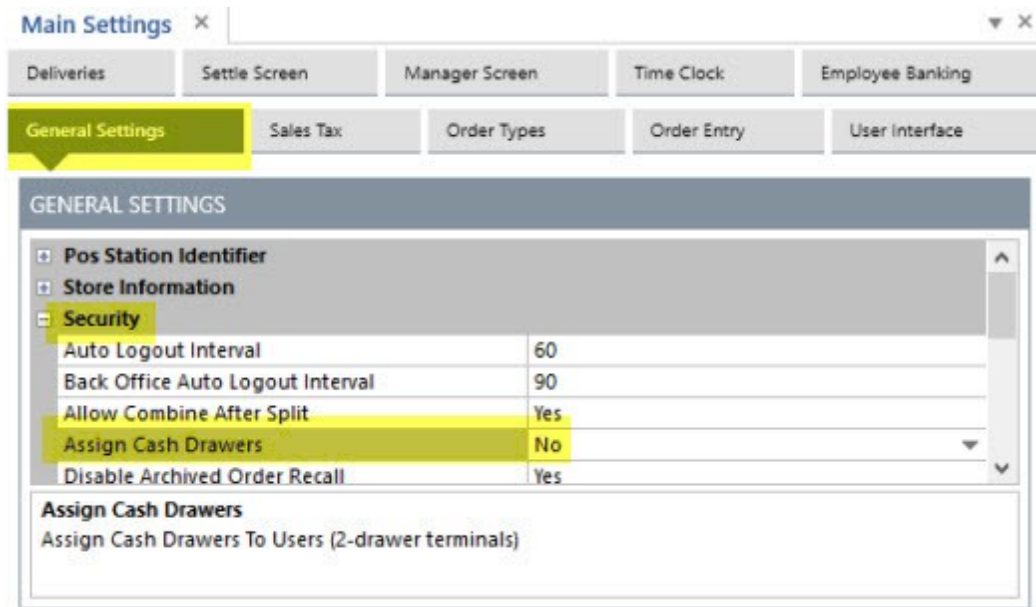
[Multiple job types](#) ⁴³³ are assigned to a single employee in the back office employee editor.



If multiple cash drawers are used, the employee is prompted to select the cash drawer after clocking in.



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.



The weekly time card can be viewed and printed by pressing the Time Card button.

My Restaurant 2/22/2021 2:35 PM

TIME CARD

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

.....
DEMO USER
TIME CARD
2/22/2021 2:35:53 PM
.....

Mon Feb 22 02:34PM - 02:35PM 0.02
.....
TOTAL HOURS 0.02

PRINT

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.

My Restaurant 2/22/2021 2:36 PM

NON-CASH GRATUITIES

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

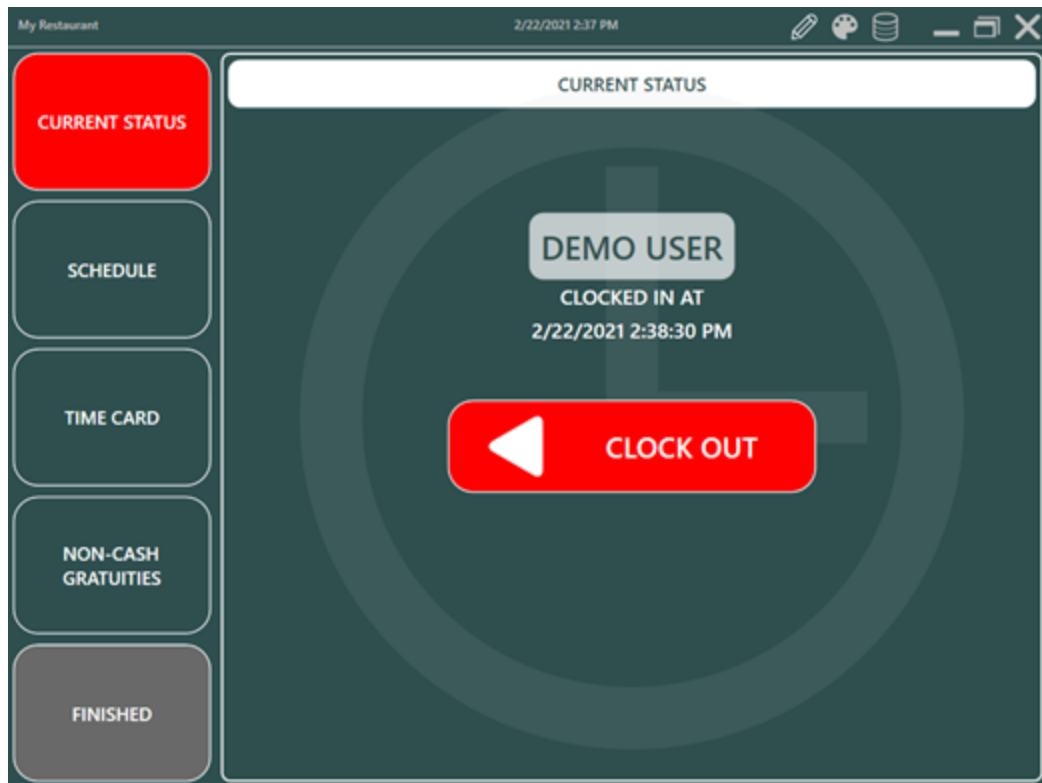
.....
NON-CASH GRATUITIES REPORT
DEMO USER
2/22/2021 2:37:04 PM
.....

ORDER#	TRANS TYPE	TIP AMNT
5	CREDIT CARD	\$5.00
		TOTAL: \$5.00

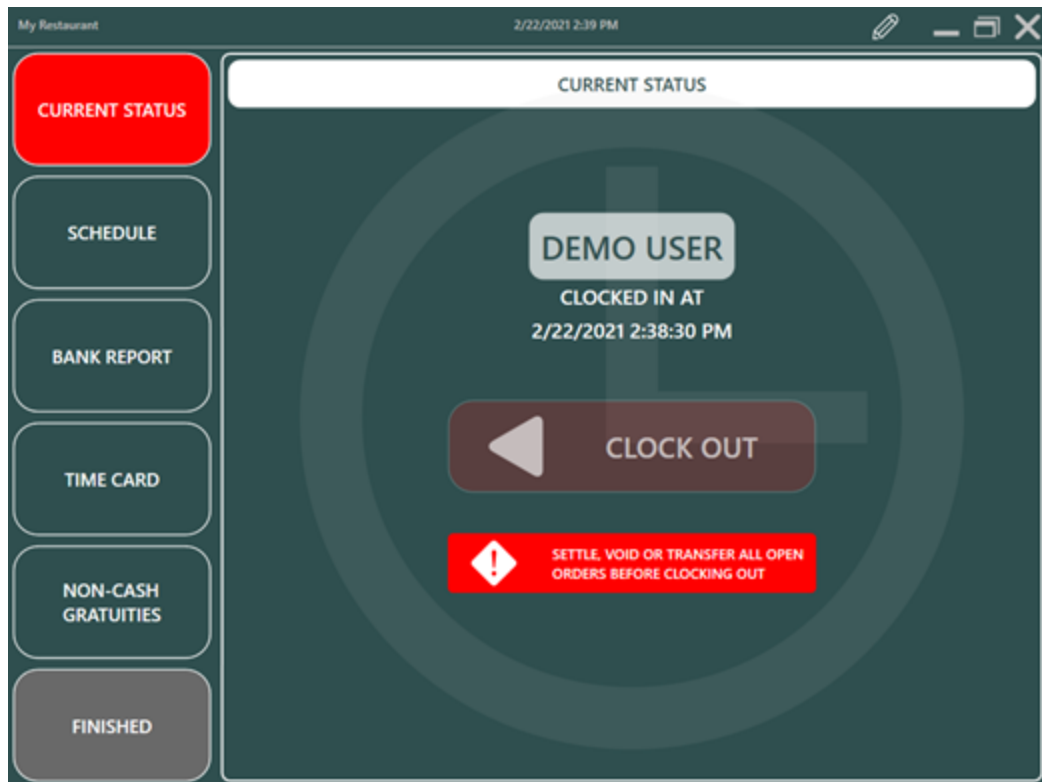
--END OF REPORT--

PRINT

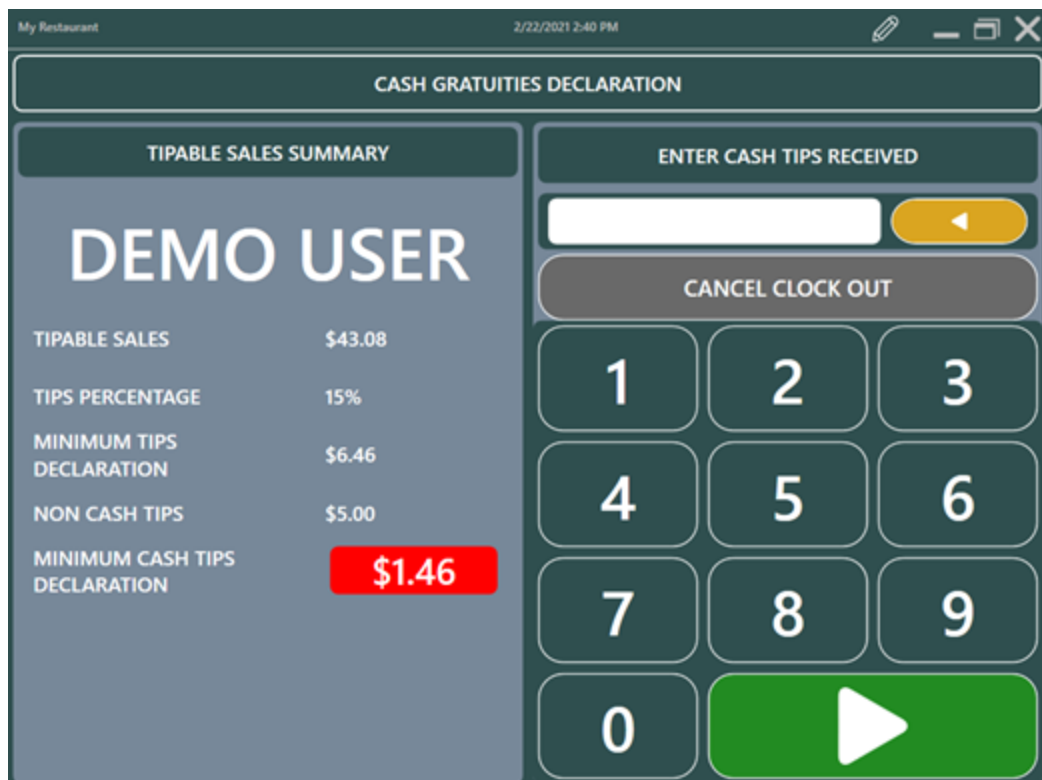
The employee can return to the time clock screen at any time and press the Current Status button to clock out.



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.



Set the Declare Gratuities [permission](#) ⁴³³ to force the employee to enter cash gratuities at clock out.

Job Types & Permissions

?

Add new job type

CHEF

COOK

DISHWASHER

DRIVER

FOOD PREP

GENERAL MANAGER

☐ Show Description

Enter text to filter permissions

dec

Default Order Type:

None

☒ Declare Gratuities

Add an employee

SPANISH DEMO

DORMAN NORMAN

18.5 Cash Tips Declaration

Mandatory cash tip declaration at clock out can be enabled for any job type by setting the Declare Gratuities [permission](#)⁴³³. 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:

Time Clock Settings	
Allow Cash Drawer Change	<input type="checkbox"/>
Auto Populate Cash Tips Field	<input type="checkbox"/>
Display Tips Declaration Summary	<input checked="" type="checkbox"/>
Enforce Minimum Cash Tips Declaration	<input checked="" type="checkbox"/>
Overtime Hours 1	8
Overtime Hours 2	12
Overtime Hours Rate 1	1
Overtime Hours Rate 2	2
Prevent Open Tickets Clock Out	<input type="checkbox"/>
Print Clock Out Bank Report	<input checked="" type="checkbox"/>
Tips Declaration Percentage	15

Allow Cash Drawer Change

Allow users To change drawer assignment In the middle Of a shift

- **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

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](#) ⁷²⁰ 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

The screenshot shows the 'CASH GRATUITIES DECLARATION' screen for a 'DEMO USER'. The screen is divided into two main sections: 'TIPABLE SALES SUMMARY' on the left and 'ENTER CASH TIPS RECEIVED' on the right. The 'TIPABLE SALES SUMMARY' section displays the following information:

TIPABLE SALES SUMMARY	
TIPABLE SALES	\$43.08
TIPS PERCENTAGE	15%
MINIMUM TIPS DECLARATION	\$6.46
NON CASH TIPS	\$5.00
MINIMUM CASH TIPS DECLARATION	\$1.46

The 'ENTER CASH TIPS RECEIVED' section features a numeric keypad with buttons for digits 0-9, a 'CANCEL CLOCK OUT' button, and a green 'PLAY' button. A text input field is present, but it is currently empty.

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.

This screenshot shows the same 'CASH GRATUITIES DECLARATION' screen, but with an invalid cash tips declaration. The 'TIPABLE SALES SUMMARY' section remains the same, with the minimum cash tips declaration highlighted as \$1.46. In the 'ENTER CASH TIPS RECEIVED' section, the text input field now displays '\$1.00'. A red alert icon (a triangle with an exclamation mark) is visible to the left of the input field. A yellow arrow points from the red alert icon to the '\$1.00' text. The numeric keypad and 'CANCEL CLOCK OUT' button are also visible.

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

BAR

COUNTER

DELIVERY

DINE-IN

DRIVE-THRU

PICK-UP

RETAIL

ROOM SERVICE

Search

- > General Settings
- > Surcharges
- > Mandatory Gratuity
- > Customer Receipt
- > Prep Tickets
- > Label Printers
- > Order Entry
- > Sales Tax
- > Remote Display
- ▼ Time Clock
 - Include In Minimum Tip Declaration ☒
- > Call Center
- > Reporting

Order Type Name

The order type name appears on the main screen b...

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

Date Range (Shift Start): 1/1/0001 6:00:00 AM - 9/25/2022 5:59:59 AM

Time Sheet Entry Editor

Time Sheet ID: 1

Employee: DEMO USER

Job: SERVER

Clock In: Tuesday, September 20, 2022 8:55:00 AM

Clock Out: ☒ Wednesday, September 21, 2022 3:05:00 PM

Cash Drawer: 1

Cash Tips: \$25

Buttons: 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

18.6 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.

Scheduler

Start: 4/9/2017

End: 4/16/2017

All Job Types

Calendar View

TOTAL HOURS: 26.00

LABOR COST: \$0.00

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

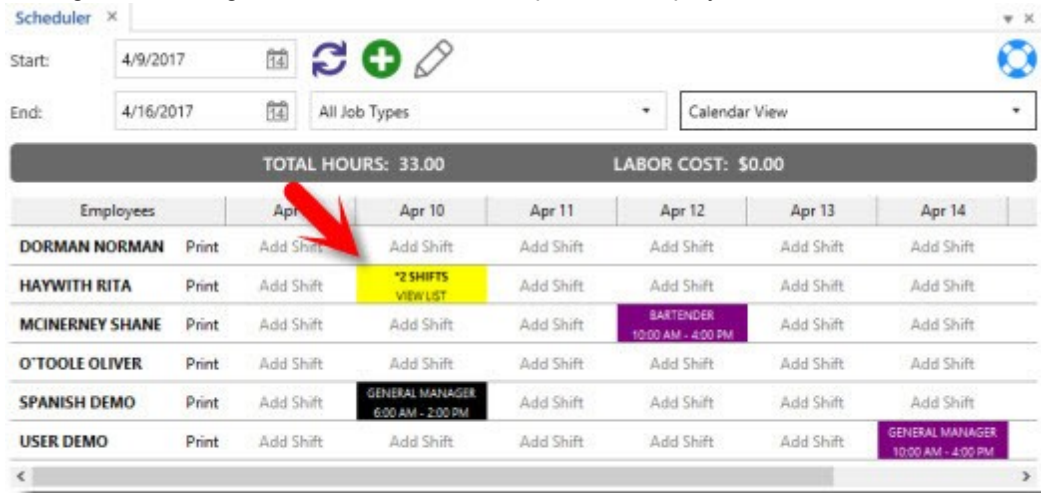
Employees are listed on the left side of the screen. Select a specific job type to filter the list. The Hour View filter enables the user to view employee hours for various time periods. The default view of the scheduler grid is Day View, where the selected day's schedule is shown. Columns may be dragged 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.

TOTAL HOURS: 26.00		LABOR COST: \$0.00	
All Employees	RITA HAYWITH	FOOD PREP	
OLIVER O'TOOLE	4/10/2017 10:00:00 AM-4:00:00 PM	Labor Cost: \$0.00	
DEMO USER			
DEMO SPANISH	DEMO SPANISH	GENERAL MANAGER	
SHANE MCINERNEY	4/10/2017 6:00:00 AM-2:00:00 PM	Labor Cost: \$0.00	
RITA HAYWITH			
NORMAN DORMAN	SHANE MCINERNEY	BARTENDER	
	4/12/2017 10:00:00 AM-4:00:00 PM	Labor Cost: \$0.00	

Schedule in List Mode

Multiple Shifts

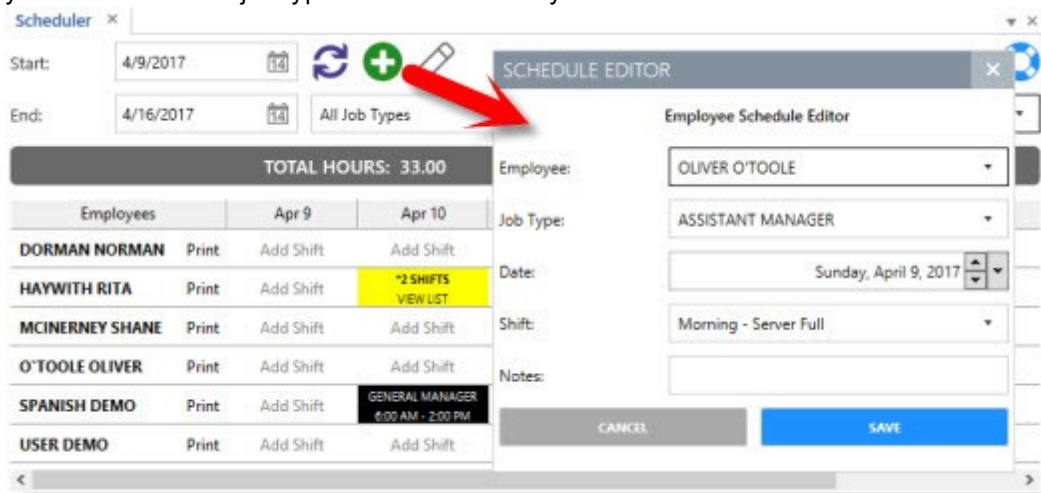
If an employee is scheduled for multiple shifts in the same calendar day, the cell is displayed with a yellow background. Change the view to list mode or print the employee schedule to view the shift details.



Multiple Shifts

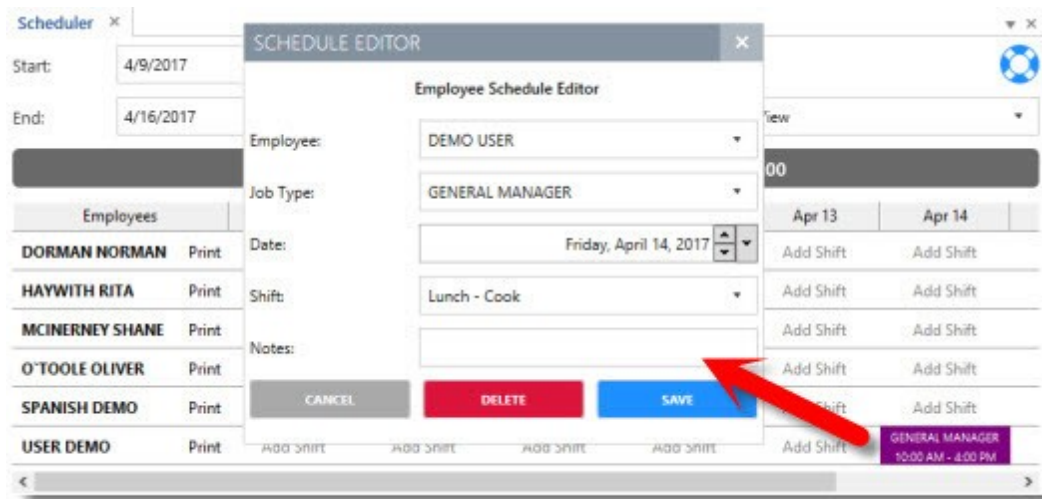
New Shift

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 at least one job type defined or the entry cannot be added.



Add New Schedule Entry

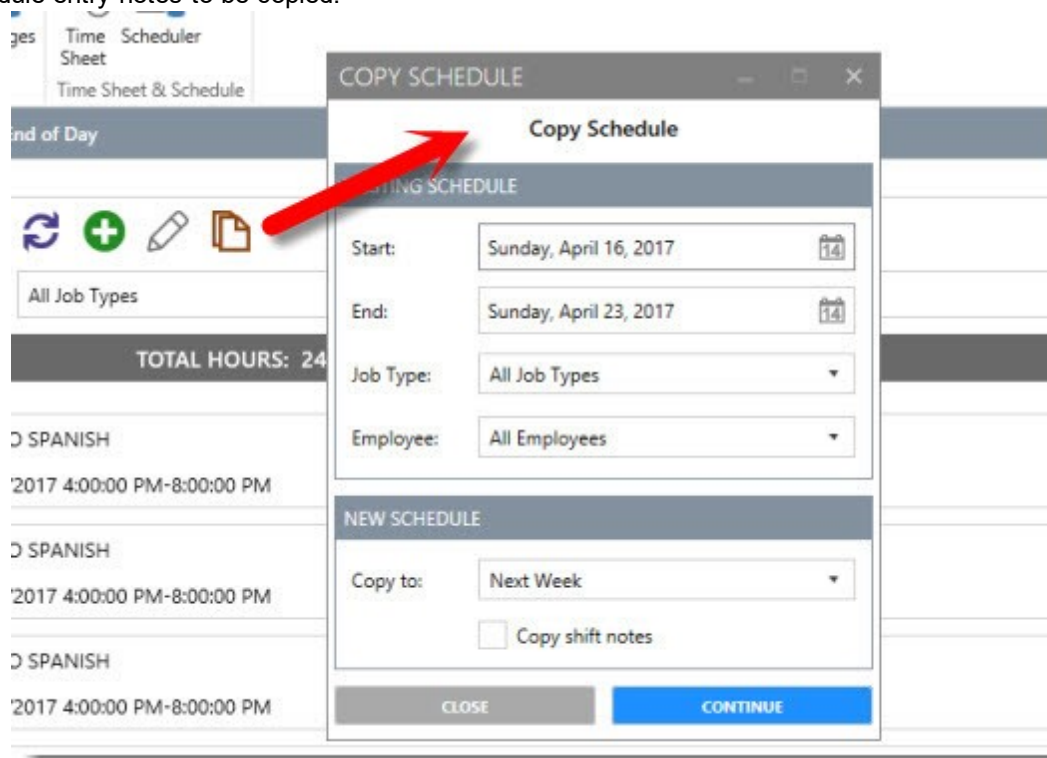
To modify an existing schedule entry, click on the cell to open the schedule entry editor.



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.



Shift Definitions

Click the Shifts Editor 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						
+ Add New						
	Description	Start Shift	End Shift	Shift Hours	Color	
+ Click here to add a new row						
	Evening - Cook	3:00 PM	10:00 PM	7.00		
	Evening - Dishwasher	3:00 PM	10:00 PM	7.00		
	Evening - Server #1	4:00 PM	8:00 PM	4.00		
	Evening - Server #2	6:00 PM	10:00 PM	4.00		
	Lunch - Cook	10:00 AM	4:00 PM	6.00		
	Lunch - Dishwasher	10:00 AM	4:00 PM	6.00		
	Lunch - Server	10:00 AM	4:00 PM	6.00		
	Morning	6:00 AM	2:00 PM	8.00		
	Morning - Cook #1	6:00 AM	12:00 PM	6.00		
	Morning - Cook #2	8:00 AM	3:00 PM	7.00		

18.7 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.

The screenshot shows the 'Employees' screen with the 'Jobs' tab selected. On the left, a list of employees is shown, with 'USER DEMO' highlighted. The main area displays the job details for 'GENERAL MANAGER'. A red box highlights the 'Weekly Pay' field set to '\$600.00' and the 'Hourly Pay Estimate' field set to '\$15.00'. Below this, the 'GENERAL MANAGER' job is listed with 'Pay Type: Hourly' and 'Pay Rate: \$0.00 Per Hour'. The 'SERVER' job is also listed with 'Pay Type: Hourly' and 'Pay Rate: \$0.00 Per Hour'.

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

Time Clock Settings	
Allow Cash Drawer Change	No
Auto Populate Cash Tips Field	No
Display Tips Declaration Summary	No
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
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
Total:		\$180.00

General Manager: Boomhauer, Jeff Thu 9/27/2012		14.00 Hrs
Clock In: 6:11 PM	Clock Out: 8:11 AM	 Edit
Cash Tips: \$0.00	Labor Cost: \$180.00	 Delete
Overtime Hours 1: 4.00	Overtime Hours 2: 2.00	

Time Sheet Editor

Boomhauer, Jeff 14.00 Total Hours									
Date	Job	Clock In	Clock Out	Cash Tips	Hourly 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

18.8 Fingerprint Login

AmigoPOS includes an integrated fingerprint management system designed specifically for the Digital Persona U-R-U 4500 and Digital Persona U-R-U 4000 USB fingerprint readers, allowing enhanced security to eliminate the possibility of password or login id sharing among employees. Follow the steps in the [fingerprint reader setup](#)³³¹ topic to enable the interface and install the drivers before completing the steps below.

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.

Login Transaction Buttons Keyboards Clock	
Login Buttons	
Number Pad	<input checked="" type="checkbox"/>
Card Swipe	<input checked="" type="checkbox"/>
Keyboard	<input checked="" type="checkbox"/>
Fingerprint	<input checked="" type="checkbox"/>
iButton	<input checked="" type="checkbox"/>
Default Login Method*	Number Pad
Login Screen	
Appearance*	Image*
Login Screen Image*	Choose Image Clear Image Preview
Show Shutdown Button*	Yes
Disable Windows Reboot Button*	Yes
Disable Windows Shut Down Button*	Yes

Fingerprint
Set to Yes to enable user login using the Digital Persona fingerprint reader

Verify that the fingerprint login icon appears on the login screen.

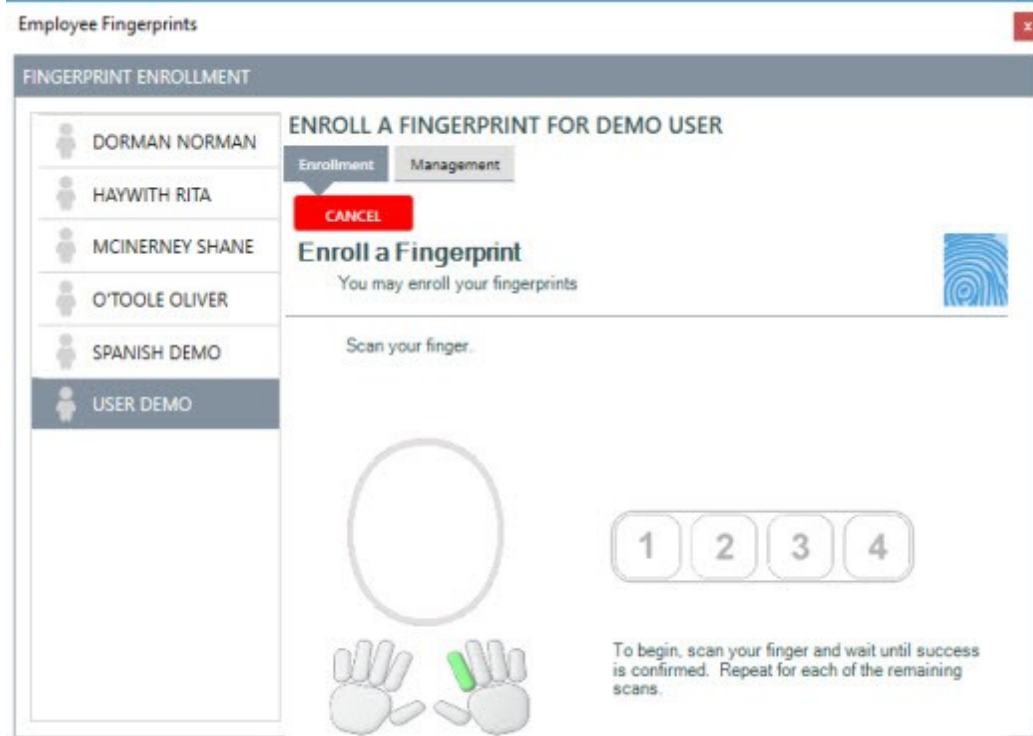


The front of house pos requires exclusive access to the fingerprint reader to login employees, preventing back office from accessing the fingerprint reader. Shut down the front of house pos and open back office to begin. A list of all employees appears on the left side of the screen. Select an employee 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.

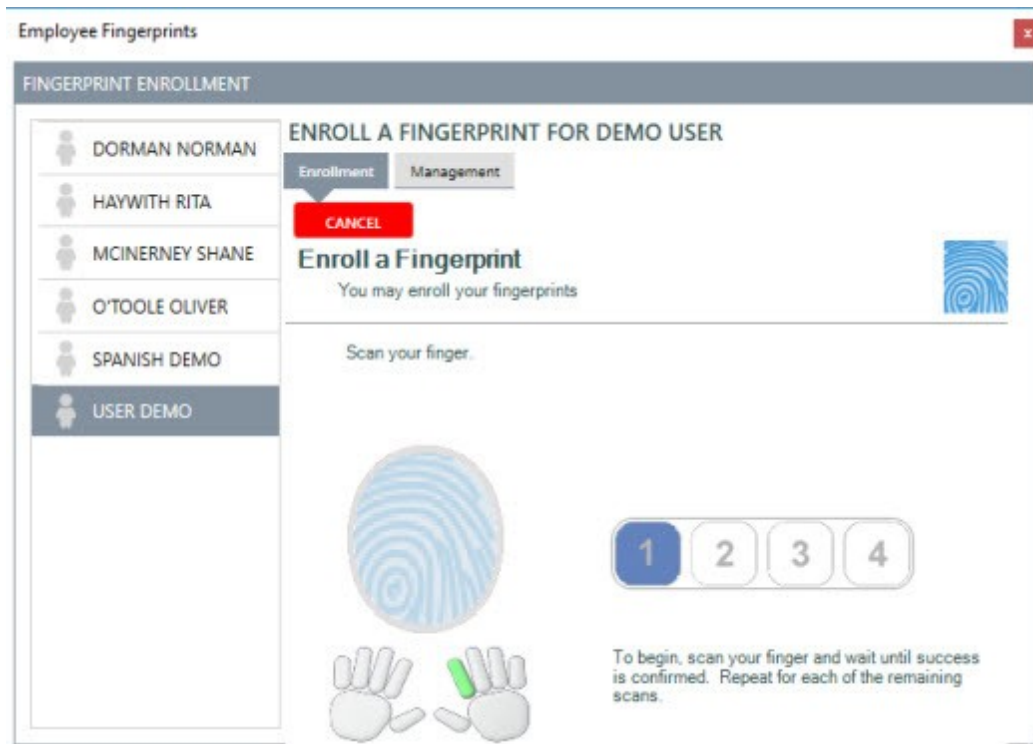
Open Back Office | Employees and click Manage Fingerprints. If the Manage Fingerprints menu item is not visible, enable the fingerprint reader as shown in the [fingerprint reader setup](#) ³³⁷ topic and restart back office.



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.



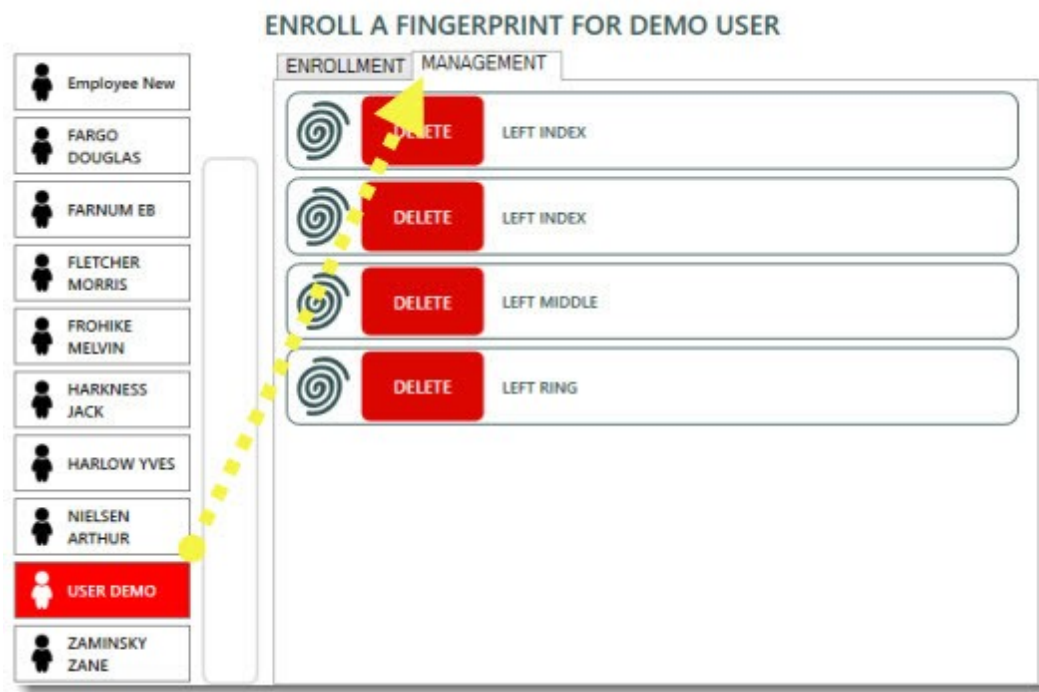
Each successful scan is indicated by a blue oval. When all four ovals are blue, the employee's scan is saved to the database.



An unsuccessful scan is 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.



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.



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.



External Applications

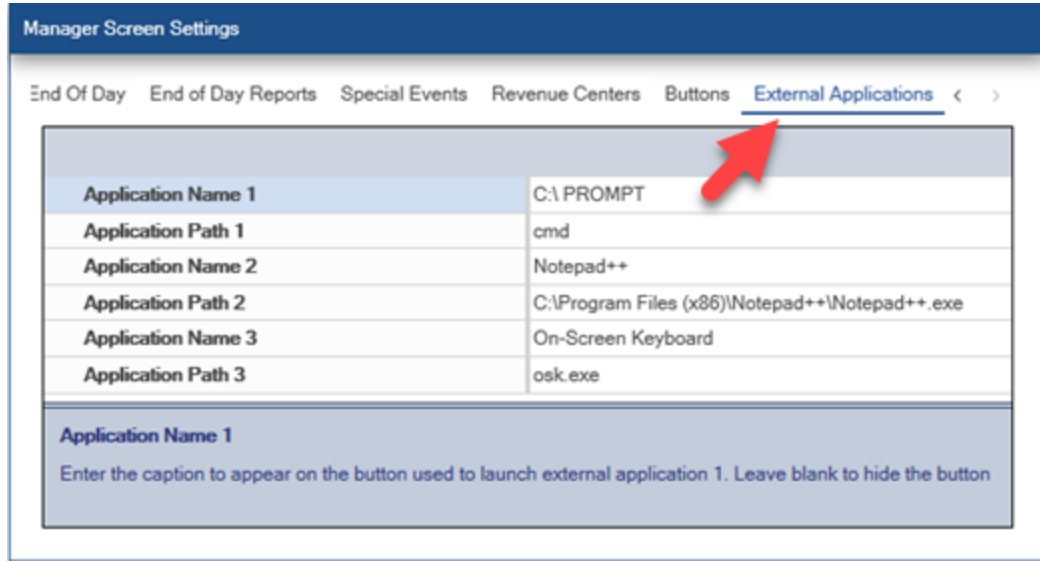
19 External Applications

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, cmd and osk.exe are recognized by Windows and only the name is required. Notepad++ is not recognized and the full path to the application is entered.

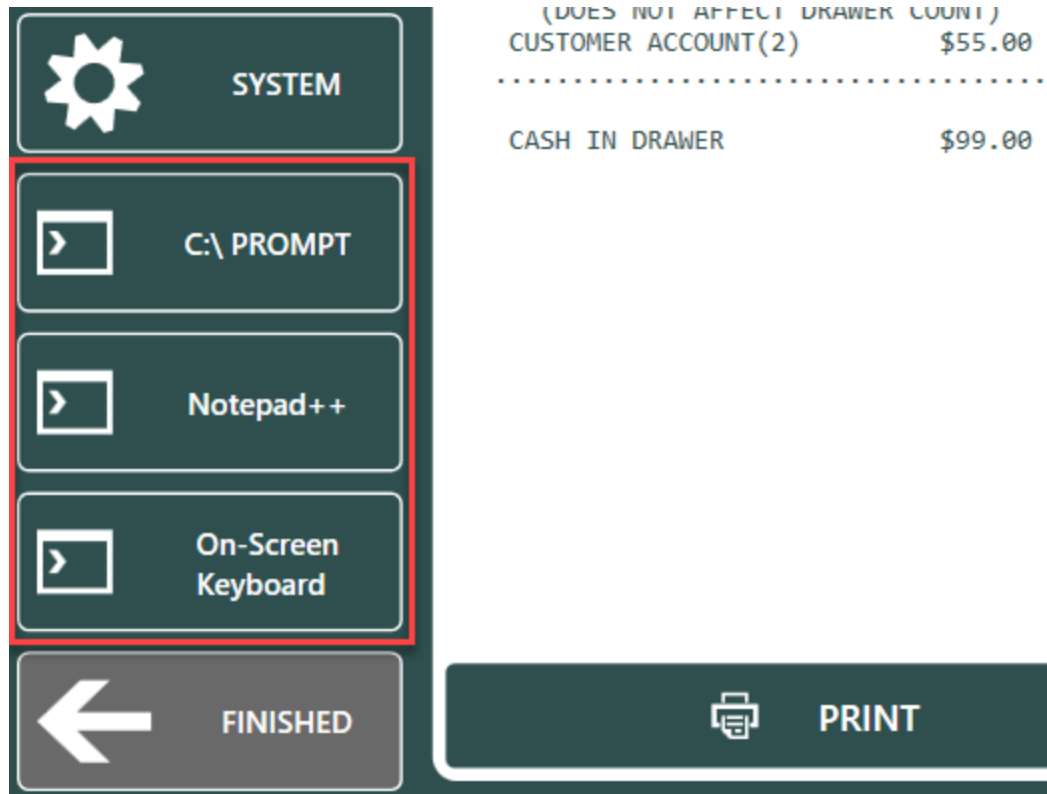
To use a .bat file, create an empty text file and save with the .bat extension. Enter the full path to the application and any parameters on the first line and save. Move the .bat file to a folder on the c:\ drive and enter the full path in the Application Path box. Additional information is available at the [Microsoft](#) web site.



The screenshot shows the 'Manager Screen Settings' window with the 'External Applications' tab selected. The tab bar includes 'End Of Day', 'End of Day Reports', 'Special Events', 'Revenue Centers', 'Buttons', and 'External Applications'. Below the tab bar is a table with three rows of application settings. A red arrow points to the 'Application Name 1' field, which contains 'C:\PROMPT'. The 'Application Path 1' field contains 'cmd'. The 'Application Name 2' field contains 'Notepad++', and the 'Application Path 2' field contains 'C:\Program Files (x86)\Notepad++\Notepad++.exe'. The 'Application Name 3' field contains 'On-Screen Keyboard', and the 'Application Path 3' field contains 'osk.exe'. Below the table is a section for 'Application Name 1' with a text box containing the instruction: 'Enter the caption to appear on the button used to launch external application 1. Leave blank to hide the button'.

Application Name	Application Path
Application Name 1	C:\PROMPT
Application Path 1	cmd
Application Name 2	Notepad++
Application Path 2	C:\Program Files (x86)\Notepad++\Notepad++.exe
Application Name 3	On-Screen Keyboard
Application Path 3	osk.exe

Application Name 1
Enter the caption to appear on the button used to launch external application 1. Leave blank to hide the button



Gift Cards

20 Gift Cards

20.1 Single Store

20.1.1 Overview

Gift card settings may be configured in back office at any pos station or back office computer. All settings are shared between pos stations except the magnetic card reader type.

Note that Datacap NETePay users can set the same HID magnetic card reader for credit card and gift card processing. Refer to the HID magnetic card reader [topic](#) ³⁴² for instructions. When a magnetic card reader is not used to read gift cards, the card reader settings may be ignored.

The gift card expiration date is determined by adding the Valid Days setting value to the date the card is activated. The date can be set in back office | settings | gift cards. Enter the number of days as a positive whole number. Check the box next to Cards Never Expire to disable gift card expiration.

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 | Devices, 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.

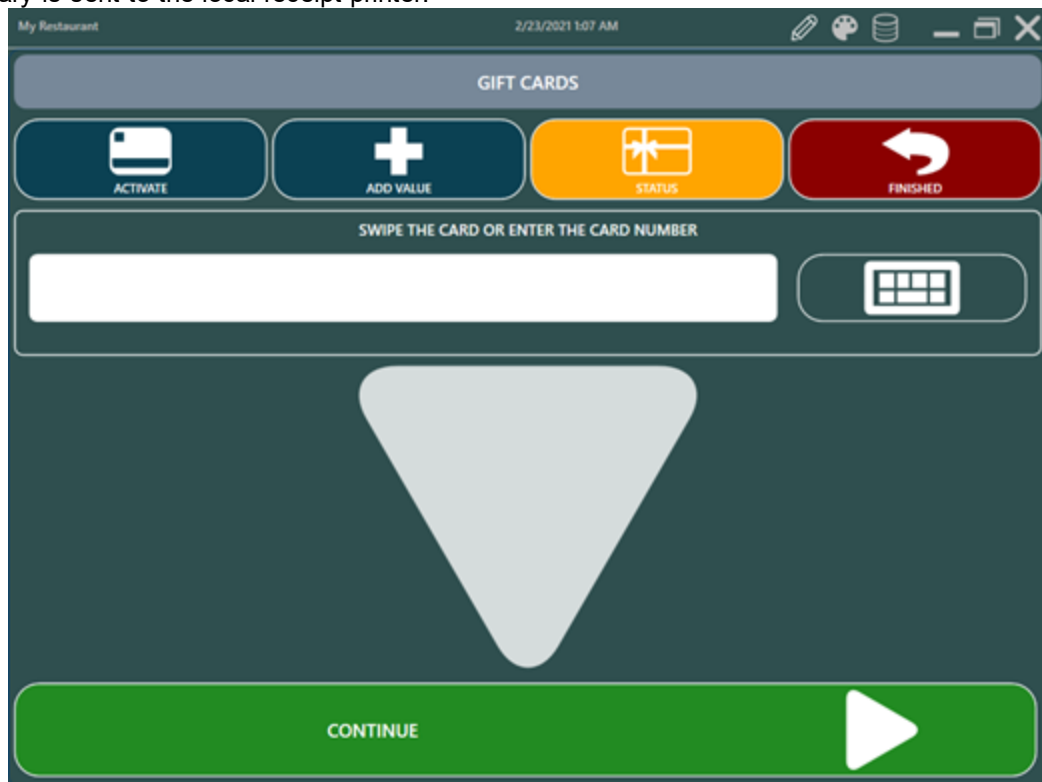
Gift Card Sales

To sell a new (previously unused) gift card, press the gift card button on the start screen and press the **ACTIVATE** button. Swipe the card or enter the card number manually. Enter the expiration date and initial value of the card. Press the **CONTINUE** button to create the new gift card. 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.

Press **ADD VALUE** to add value to a gift card. Enter the amount to add and press the **CONTINUE** button. Note that a new order is started whenever value is added to a gift card.



Press STATUS to view a gift card's complete transaction history. When printing the status, the card summary is sent to the local receipt printer.



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.



To settle an order using a gift card, press the SETTLE button, select the order to settle and select the GIFT CARD payment type.



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.

My Restaurant 2/23/2021 1:12 AM

BALANCE DUE \$3.08

ORDER NUMBER	7
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/23/2021 1:12 AM
SUBTOTAL	\$2.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.28
TOTAL	\$3.08
RECEIVED	\$0.00

TRANSACTIONS RECALL PRINT RECEIPT 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

▶

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.

My Restaurant 2/23/2021 1:13 AM

BALANCE DUE \$3.08

GIFT CARD #12345

CARD ID	12345
PURCHASED	2/23/2021
START AMOUNT	\$50.00
EXPIRES	NEVER
AVAILABLE BALANCE	\$50.00

PRINT SUMMARY

ORDER NUMBER	7
TYPE	COUNTER
SERVER	DEMO USER
STARTED	2/23/2021 1:12 AM
SUBTOTAL	\$2.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.28
TOTAL	\$3.08
RECEIVED	\$0.00

TRANSACTIONS RECALL PRINT RECEIPT CANCEL

GIFT CARD ID 12345

ENTER THE AMOUNT (UP TO \$3.08)

\$3.08

CHANGE PAYMENT METHOD

\$1 \$5 \$10 \$20 \$50 \$100
EXACT CHANGE NEXT \$ AMOUNT

1 2 3
4 5 6
7 8 9
0

▶

Confirm the transaction details and press the green button to complete the transaction.

My Restaurant 2/23/2021 1:14 AM

NO BALANCE DUE

GIFT CARD #12345

CARD ID	12345
PURCHASED	2/23/2021
START AMOUNT	\$50.00
EXPIRES	NEVER
AVAILABLE BALANCE	\$46.92

PRINT SUMMARY

ORDER NUMBER: 7

TYPE: COUNTER

SERVER: DEMO USER

STARTED: 2/23/2021 1:12 AM

SUBTOTAL: \$2.80

GRATUITY: \$0.00

DISCOUNTS: \$0.00

SURCHARGE: \$0.00

DELIVERY: \$0.00

TAX: \$0.28

TOTAL: \$3.08

RECEIVED: \$3.08

TRANSACTIONS

TRANSACTION COMPLETE

TRANSACTION AMOUNT \$3.08

NO CHANGE DUE

ADDITIONAL PAYMENT

PRINT RECEIPT

PRINT RECEIPT

FINISHED

LOGOUT

A list of gift Cards can be viewed in Back Office | Summary | Gift Cards by clicking the Cards tab.

AmigoPOS 9 Back Office

START SUMMARY REPORTS MENU EMPLOYEE CUSTOMER INVENTORY SETTINGS HELP

Orders Transactions Credit Deliveries Bar Gift Drawer Cash Cash Employee End End End User
Cards Tabs Cards Reset Drops Paid Deposits Shift Day Of Day Access
Log Log Log Log Log Log Log Log Log Log

Gift Cards

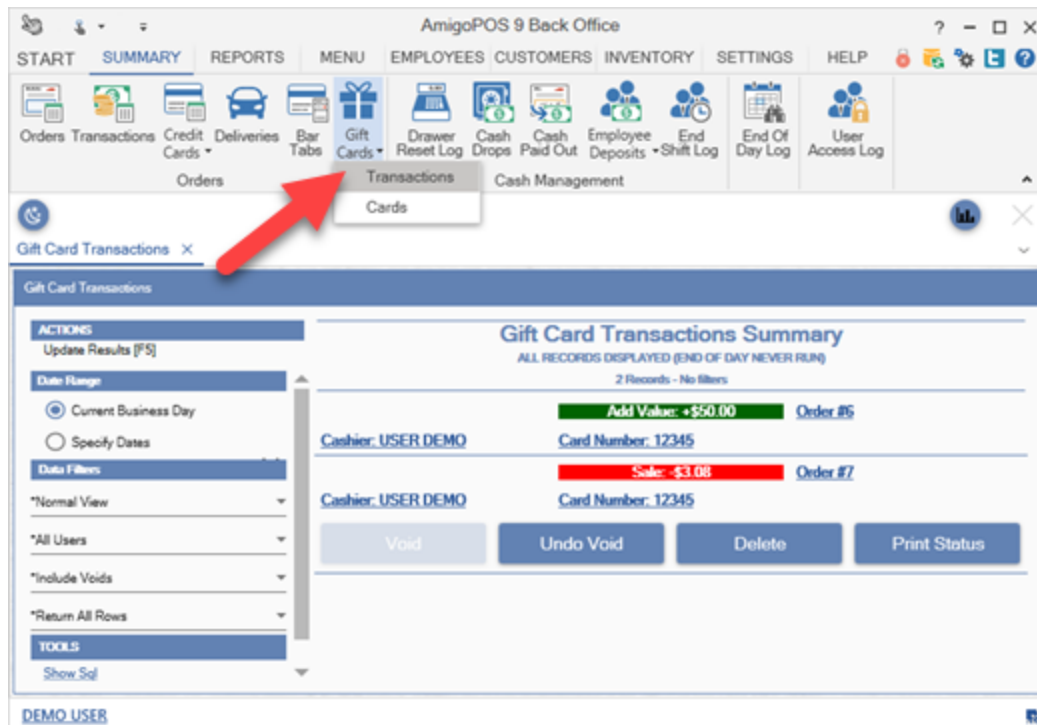
GIFT CARDS SUMMARY
ALL RECORDS DISPLAYED (END OF DAY NEVER RUN)
1 Record - No filters

Card ID: 1 Expires: 2/23/2026 Available Balance: \$46.92
Card Number: 12345 Date Sold: 2/23/2021 1:11:10 AM Sold By: USER DEMO

Deactivate Card Delete Print Status

DEMO USER

Gift Card transactions can be viewed in Back Office | Summary | 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 clicking VOID.



20.1.2 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 the demo version of AmigoPOS. Be sure to request a test card to verify that the card is properly encoded before ordering the full run of 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 | devices | magnetic card reader as described in the [magnetic card reader configuration](#) help topic.

20.2 AmigoPOS Cloud Service

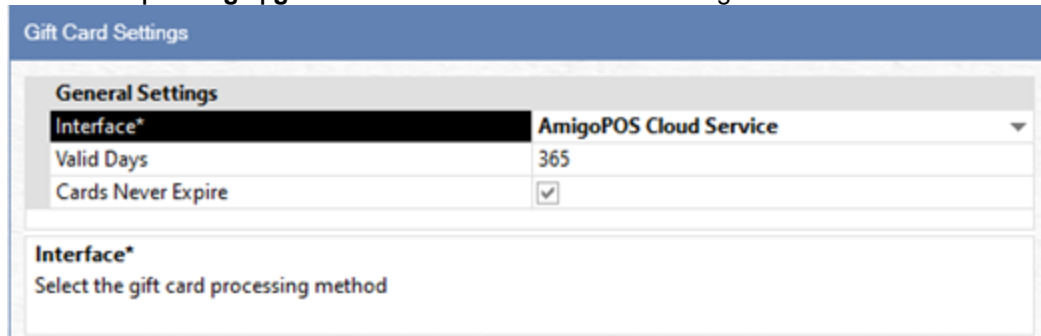
The gift and loyalty card cloud service is useful for businesses with multiple locations so that customers can use cards at any location. The service is hosted on Microsoft Windows Azure Cloud Servers with low latency and built-in redundancy for maximum uptime and unsurpassed reliability.

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 AmigoPOS Cloud Service.



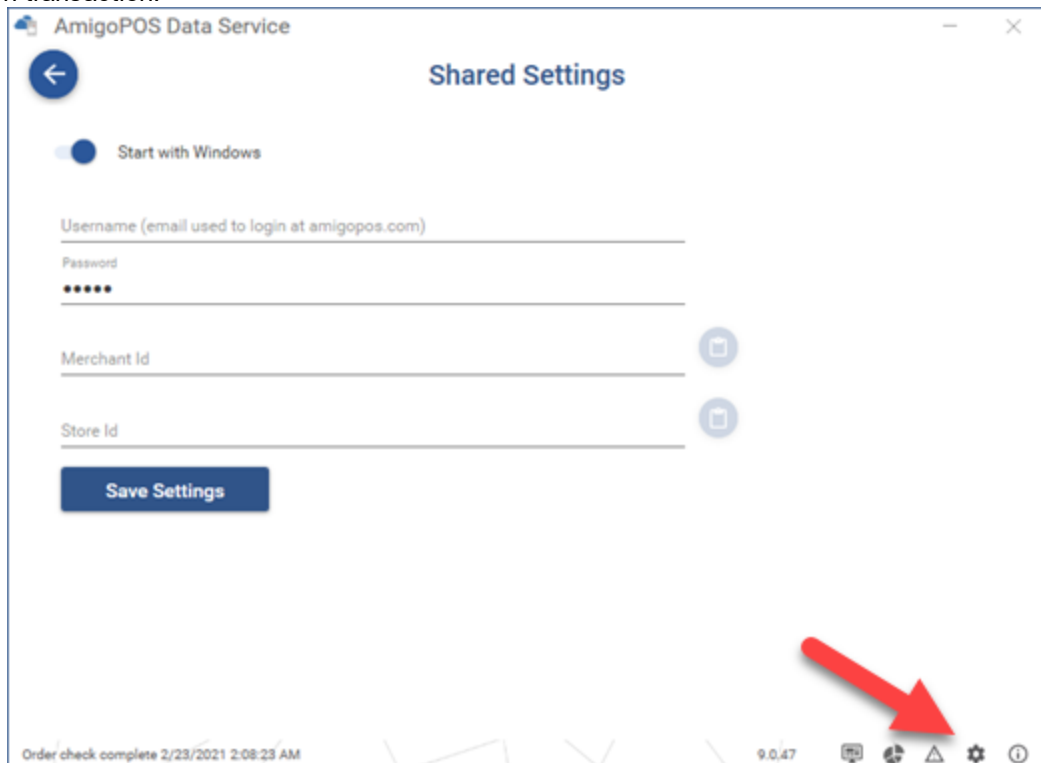
Gift Card Settings

General Settings

Interface*	AmigoPOS Cloud Service
Valid Days	365
Cards Never Expire	<input checked="" type="checkbox"/>

Interface*
Select the gift card processing method

Open the data service application and click the shared settings icon at the bottom right. Enter the same username and password that are used to login to amigopos.com. Login to amigopos.com and click the Cloud Services link to retrieve the merchant id and store id. Click Save Settings. 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.



AmigoPOS Data Service

Shared Settings

☒ Start with Windows

Username (email used to login at amigopos.com)

Password

Merchant Id

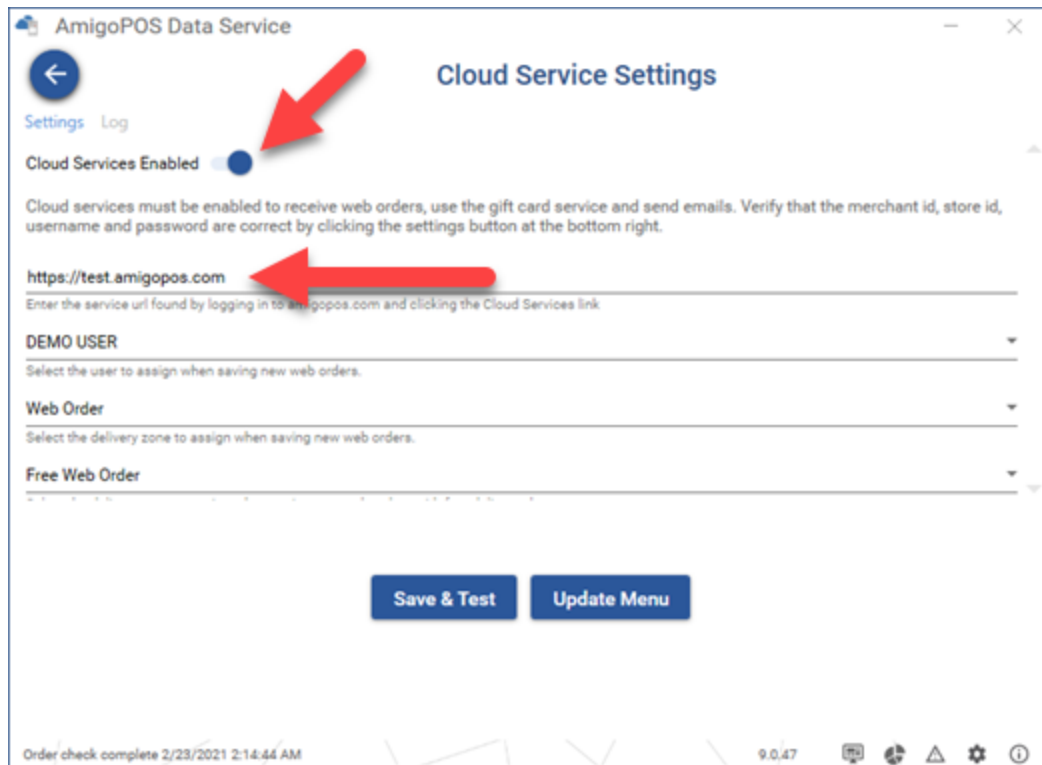
Store Id

Save Settings

Order check complete 2/23/2021 2:08:23 AM

9.0.47

Click the Cloud Service settings in the data service application, verify that the cloud services are enabled and enter the service url. Click Save & Test and click the Log tab to view the server response to verify that the settings are correct.



20.3 Datacap GIFTePay

20.3.1 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. Refer to <https://datacap systems.com/supported-features-processors> for the complete list of gift card processors that are compatible with Datacap GIFTePay.

Gift/Loyalty Support - GIFTePay

GIFTePay supports virtually all gift/loyalty platforms. Scroll down to see all supported gift card networks.

	Gift	Loyalty
Ackroo	✓	✓
Archer Chockstone Gift	✓	✓
Card Dog	✓	
Clutch	✓	
eGiftSolutions	✓	✓
Elavon Gift	✓	
EVO Gift*	✓	✓
Factor4*	✓	✓

* = available on NETePay Hosted. Don't see your gift provider of choice on NETePay Hosted? Contact us to add it!

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 (with different Secure Device Ids when using EMV for credit card processing) can be used for both Datacap [NETePay](#)⁹⁶ and GIFTePay. In most cases the GIFTePay can be added to your existing NETePay installation without the need to run 2 separate applications.

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.

- **Interface:** Select Datacap GIFTePay from the drop-down list.
- **Merchant ID:** Enter the Merchant ID as shown in the Merchant Information box in the GIFTePay setup screen.
- **Terminal ID:** Enter the Terminal ID as shown in the Merchant Information box in the GIFTePay setup screen.
- **GIFTePay Server IP/URL:** 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.
- **Card Reader Secure Device Id:** Enter the Secure Device Id as listed at <https://datacapsystems.com/compatible-devices> (scroll to Non-EMV devices and search for the device). In most cases the same device is used to process credit card and gift card transactions. Note that GIFTePay uses the PDCX component (Non-EMV) and NETePay uses the EMV component so that the GIFTePay secure device id is different from the NETePay secure device id.
- **Card Reader COM Port:** Select the virtual COM port used by the card reader.
- **Ethernet Device IP Address:** This setting is only used for devices with an Ethernet interface. Enter the IP address of the terminal (For example 192.168.x.x). Leave empty for USB devices.
- **Ethernet Device Network Port:** This setting is only used for devices with an Ethernet interface. Enter the network port of the terminal (for example Ingenico devices use port 12000). Set to zero for USB devices.

- **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

20.3.2 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.

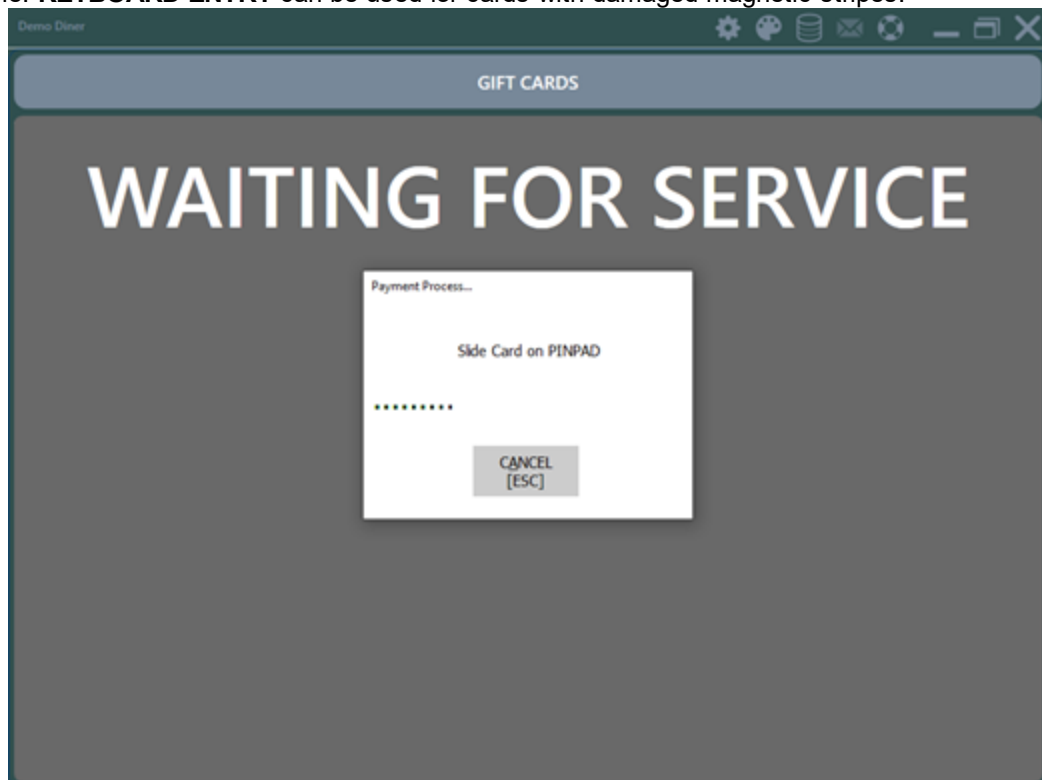
- [ISSUE](#) ⁴⁷⁷
- [RELOAD](#) ⁴⁷⁹
- [RETURN](#) ⁴⁸⁰
- [CASH OUT](#) ⁴⁸⁰
- [BALANCE](#) ⁴⁸¹
- [SALE](#) ⁴⁸²
- [VOID ISSUE](#) ⁴⁸⁶
- [VOID RELOAD](#) ⁴⁸⁶
- [VOID RETURN](#) ⁴⁸⁶
- [VOID SALE](#) ⁴⁸⁶

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).

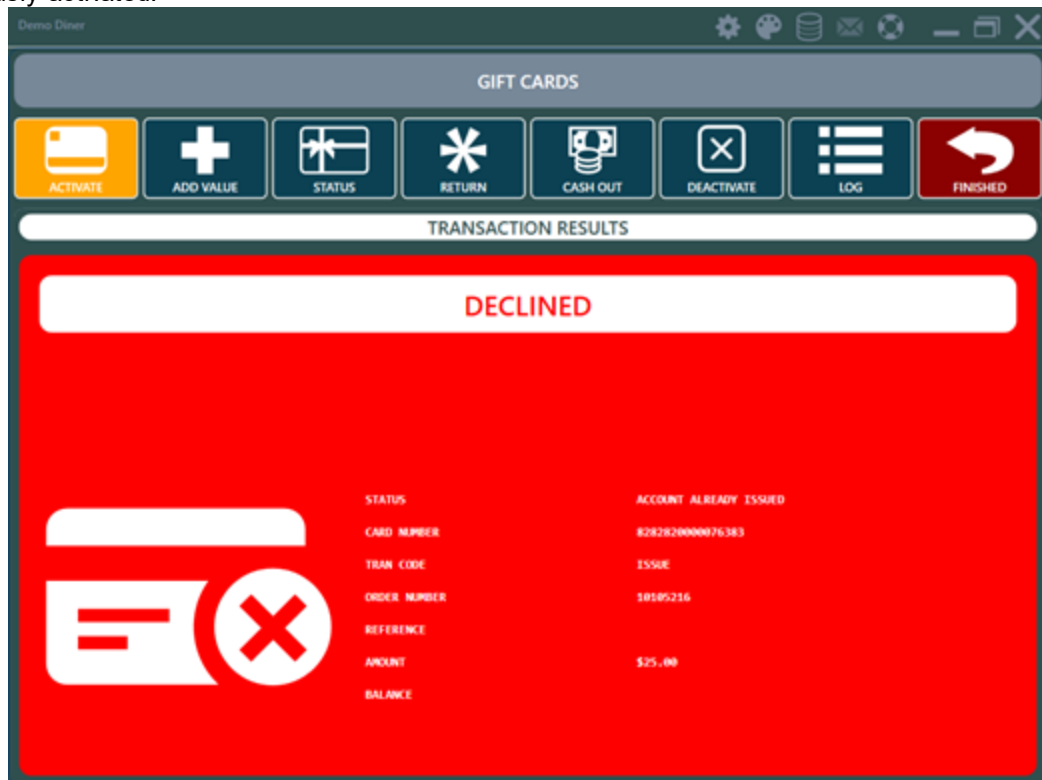


Enter the amount and select the gift card input method. **SWIPE CARD** should be used whenever possible. **KEYBOARD ENTRY** can be used for cards with damaged magnetic stripes.



The 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. 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 transaction below was not approved because the gift card was previously activated.



RELOAD

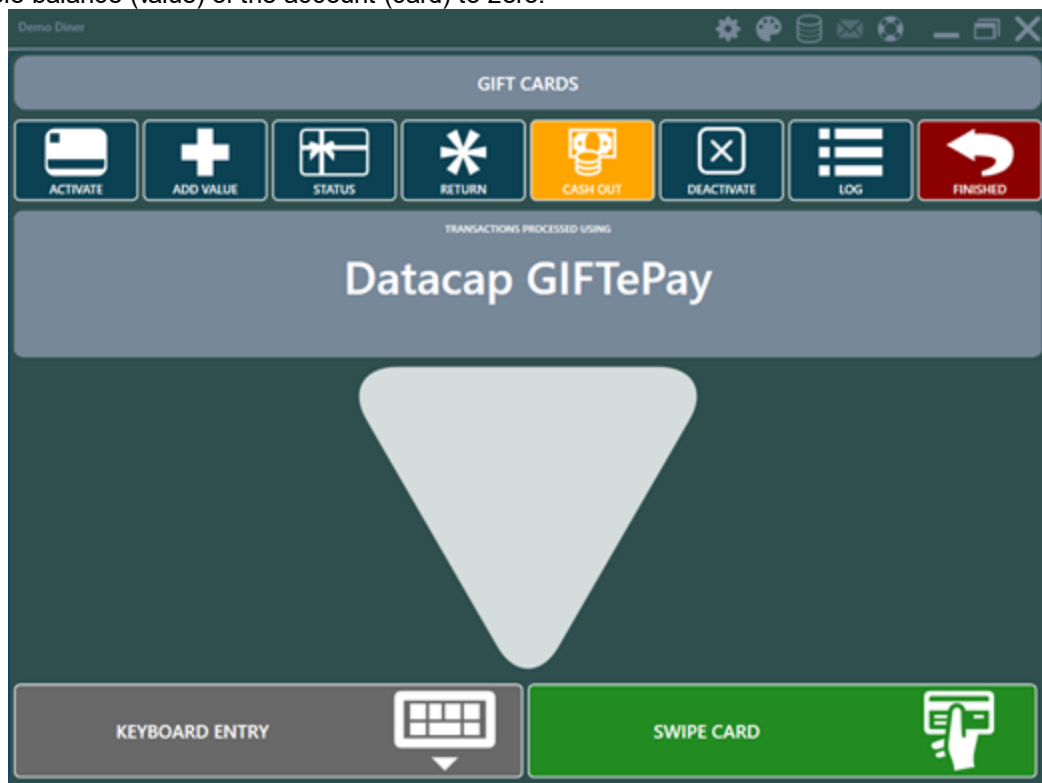
Press the **ADD VALUE** button at the top to add value to an existing prepaid card. Reload increases the available balance (value) of the account (card).

**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).

**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.



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.

**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).



Enter the transaction amount and press the green button to continue. The maximum transaction amount allowed is the balance due on the order.

ORDER DETAILS:

ORDER NUMBER	13
TYPE	COUNTER
SERVER	ROY BATTY
STARTED	12/6/2022 4:51 AM
SUBTOTAL	\$2.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.28
TOTAL	\$3.08
RECEIVED	\$0.00

GIFT CARD TRANSACTION:

ENTER THE AMOUNT (UP TO \$3.08): **\$3.08**

Buttons: \$1, \$10, \$20, \$50, \$100, EXACT CHANGE, NEXT \$ AMOUNT, 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, CHANGE PAYMENT METHOD, and a large green play button.

Select the gift card input method. **SWIPE CARD** should be used whenever possible. **KEYBOARD ENTRY** can be used for cards with damaged magnetic stripes.

TRANSACTIONS PROCESSED USING: Datacap GIFTePay

Buttons: SWIPE CARD, KEYBOARD ENTRY, and CANCEL.

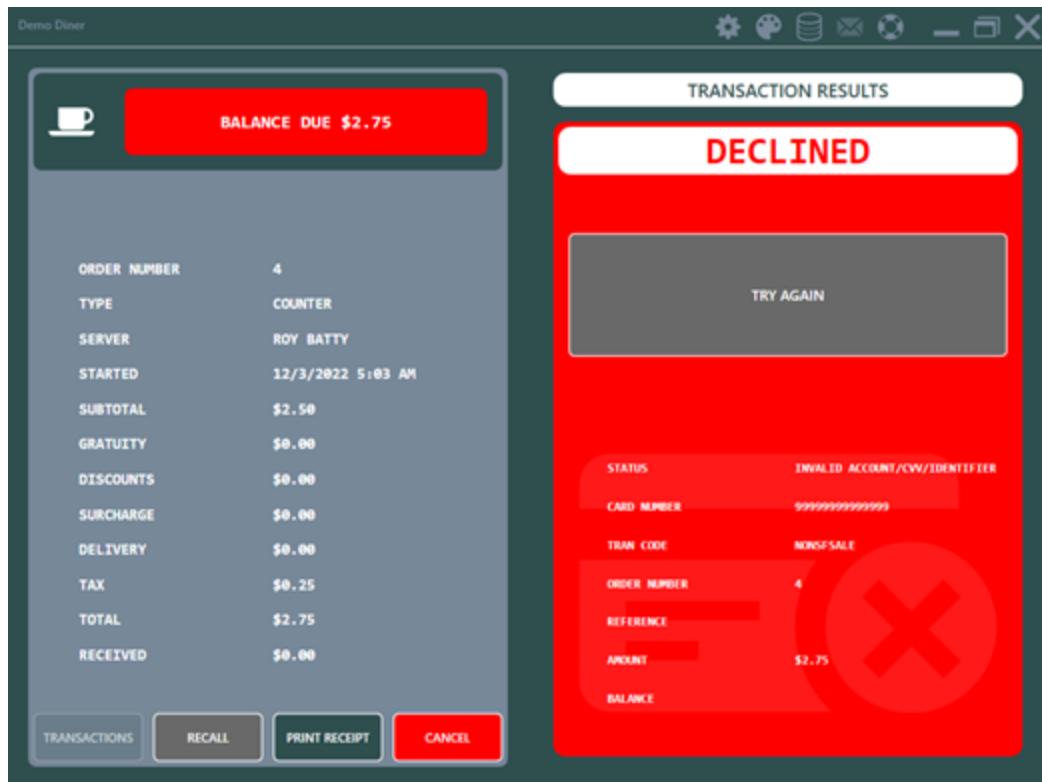
The transaction results should appear within 2-3 seconds. A successful transaction will display a green background with APPROVED in block letters at the top with transaction information below, including the remaining balance.

The screenshot shows the AmigoPOS 9 interface. On the left, the order details are displayed in a list format. On the right, the transaction results are shown on a green background with the word 'APPROVED' in large, bold, white letters. Below this, there are buttons for 'VOID TRANSACTION', 'PRINT RECEIPT', 'PRINT STATUS', 'FINISHED', and 'LOGOUT'. A large green checkmark is visible in the bottom right corner of the transaction results panel.

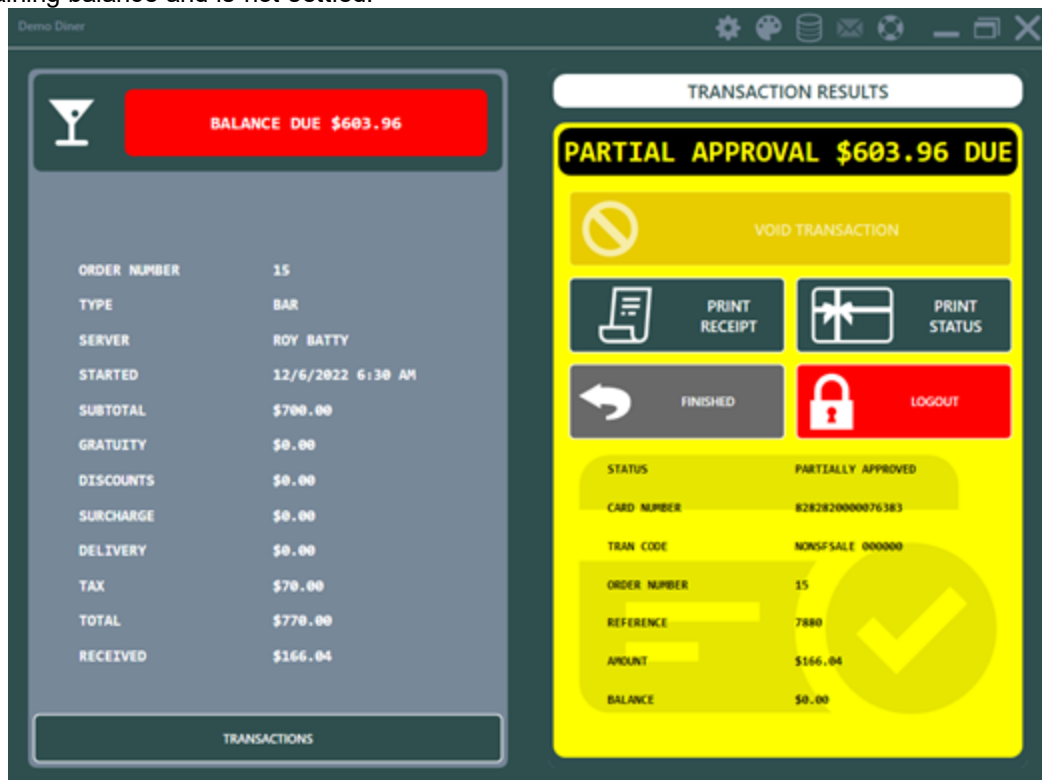
ORDER NUMBER	13
TYPE	COUNTER
SERVER	ROY BATTY
STARTED	12/6/2022 4:51 AM
SUBTOTAL	\$2.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.28
TOTAL	\$3.08
RECEIVED	\$3.08

TRANSACTION RESULTS	
APPROVED	
VOID TRANSACTION	
PRINT RECEIPT	PRINT STATUS
FINISHED	LOGOUT
STATUS	APPROVED
CARD NUMBER	8282820000076383
TRAN CODE	NONS-SALE 016604
ORDER NUMBER	13
REFERENCE	7879
AMOUNT	\$3.08
BALANCE	\$166.04

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.



A yellow background appears if the transaction is not approved for a partial amount so that the order has a remaining balance and is not settled.



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)



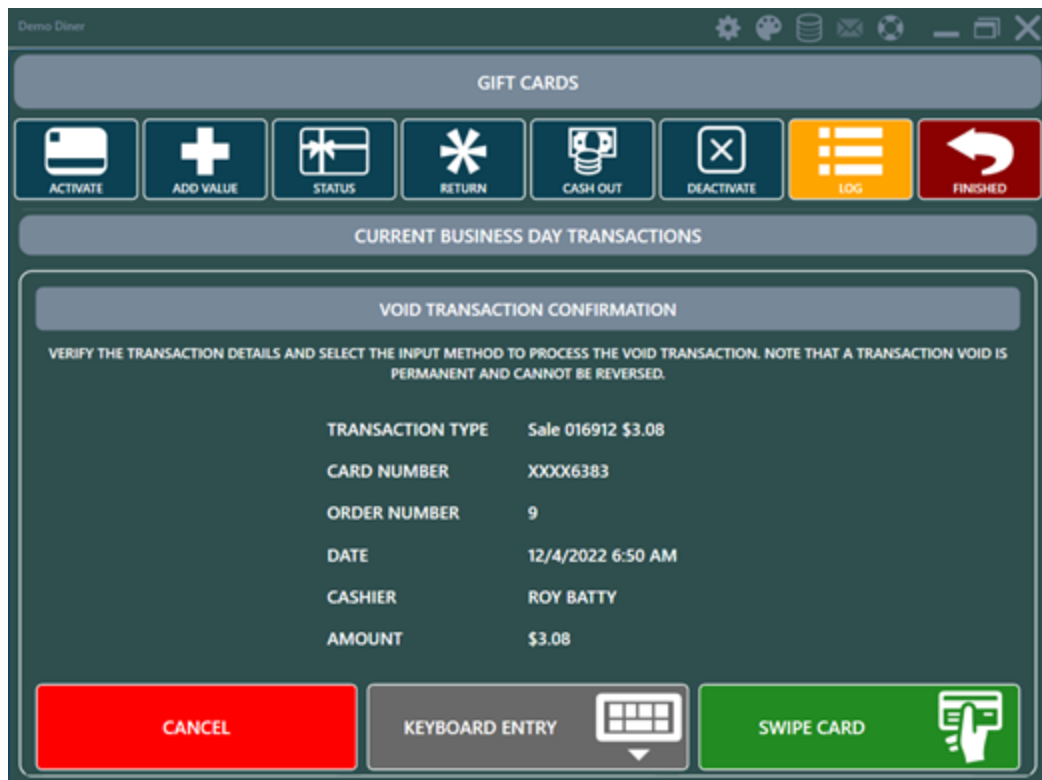
LOG

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:

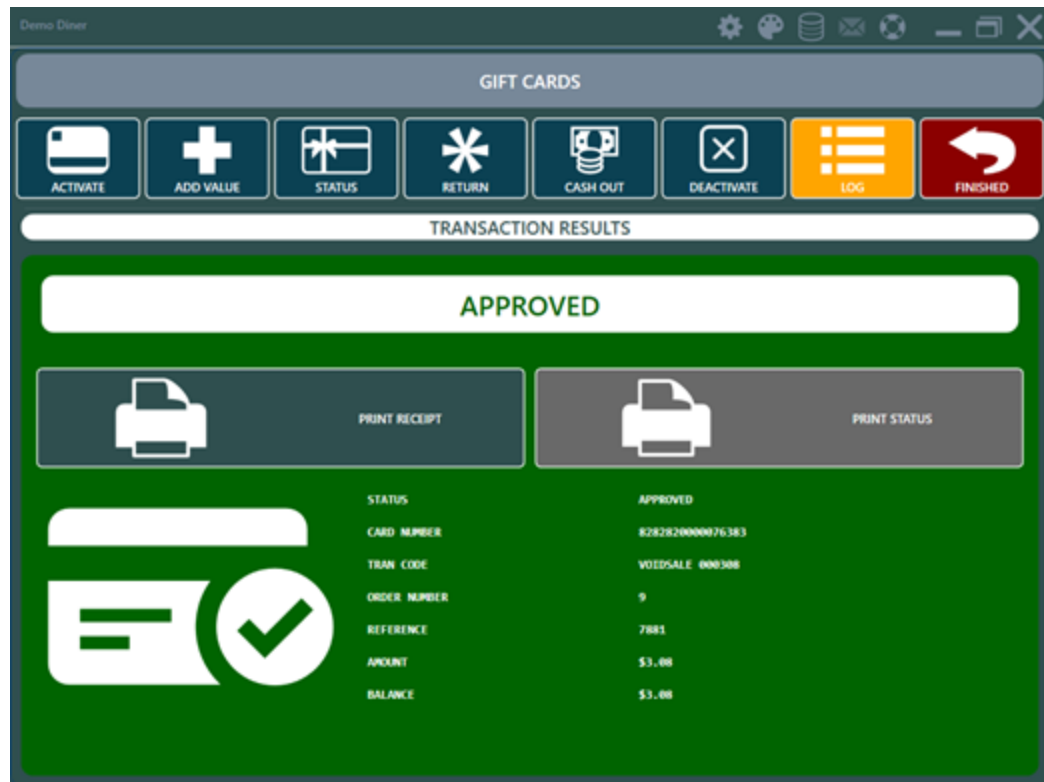
- **Void Issue:** To void the previous issue a new prepaid (stored value) card with a starting balance (value).
- **Void Reload:** To void a previous Reload transaction to an existing card. Voiding a Reload decreases the available balance (value) of the account (card).
- **Void Return:** To void a previous 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).



Press VOID TRANSACTION and verify the transaction details. Select an input method to process the void.



A successful void appears with a green background and the transaction is marked voided. In addition, the order status is recalculated and appears on the recall list with a balance due.

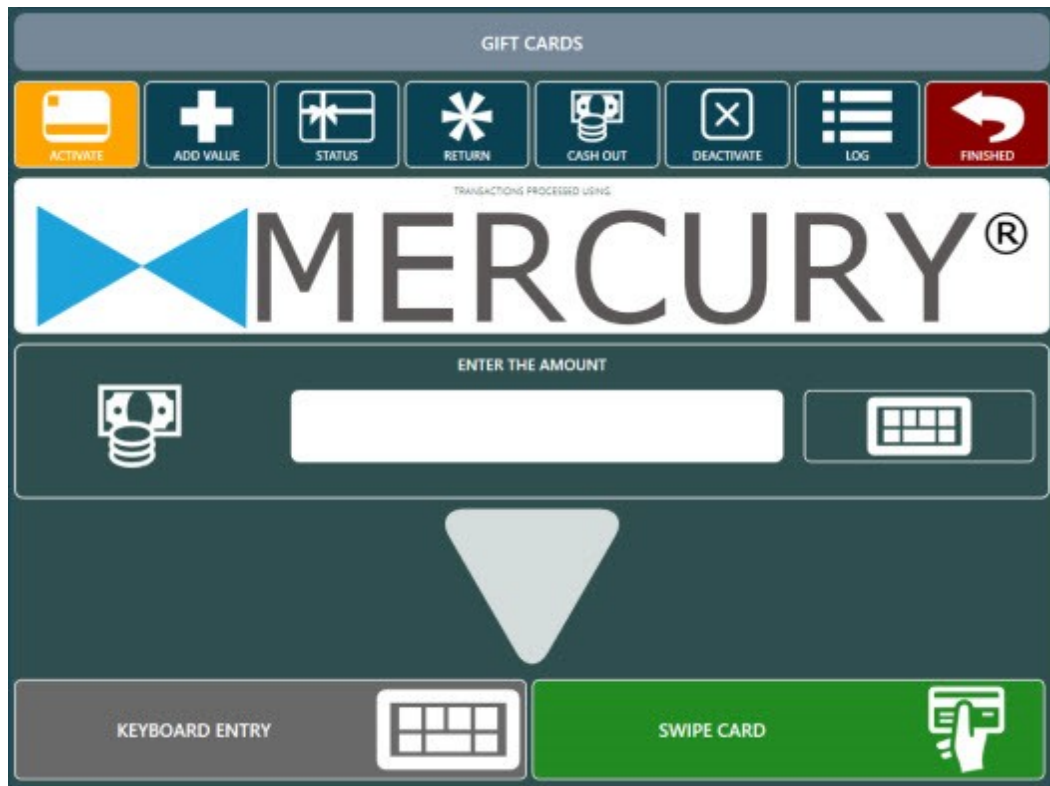


20.4 Usage

20.4.1 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](#)^[433]. The following functions are available on the gift cards screen:

- [Activate](#)^[490]: Activate a new gift card
- [Add Value](#)^[491]: Add value to a previously activated gift card
- [Balance](#)^[492]: View and print the available balance on a gift card
- [Log](#)^[492]: View a list of recent gift card transactions



Employee Permissions

Access to the gift cards screen and individual gift card functions are determined by the logged in user's [permissions](#) ⁴³³ 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

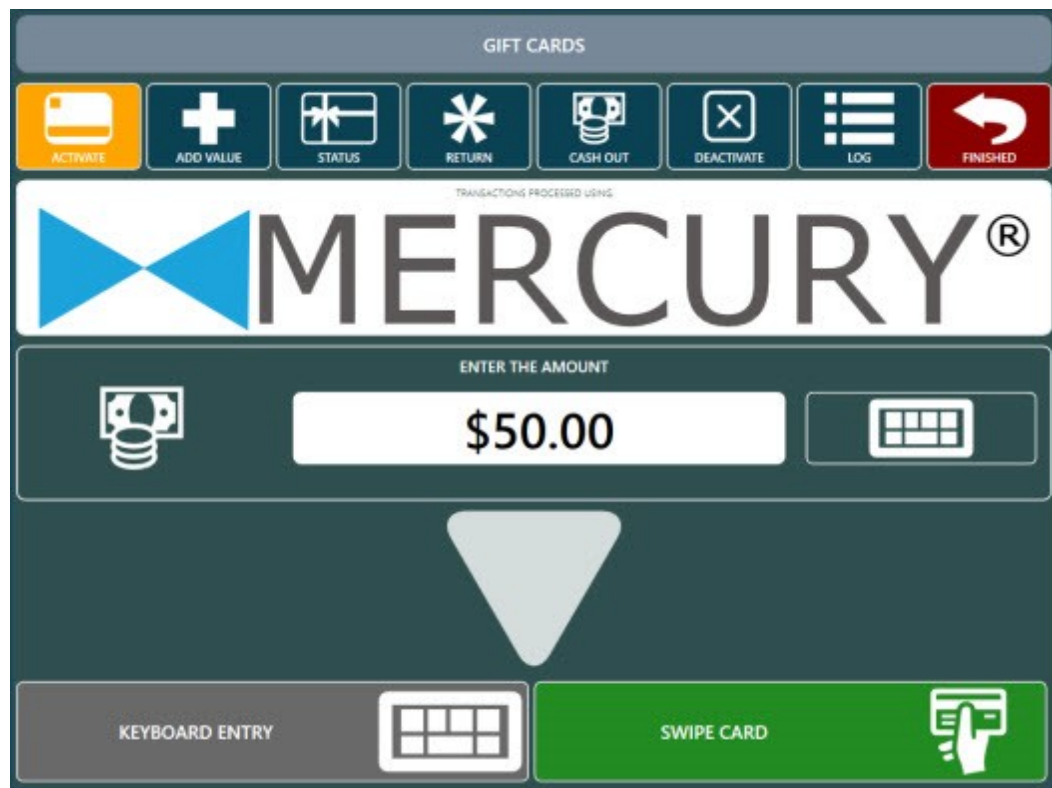
☒ Allow Inventory Count

☒ Allow Inventory Receive

USER, DEMO

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.



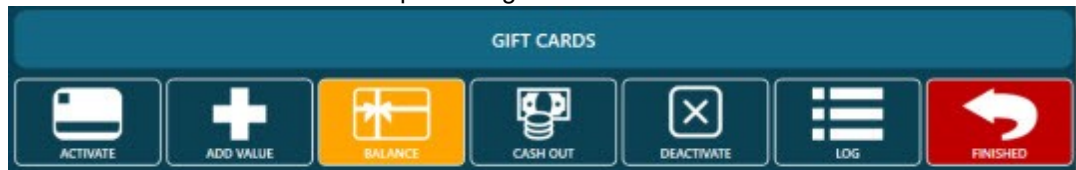
Add Value

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.



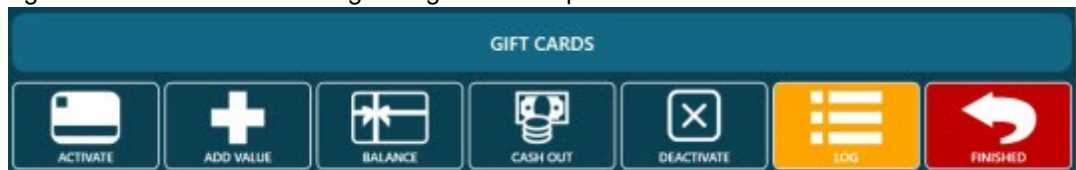
Balance

Press the BALANCE button to view or print the gift card's available balance.



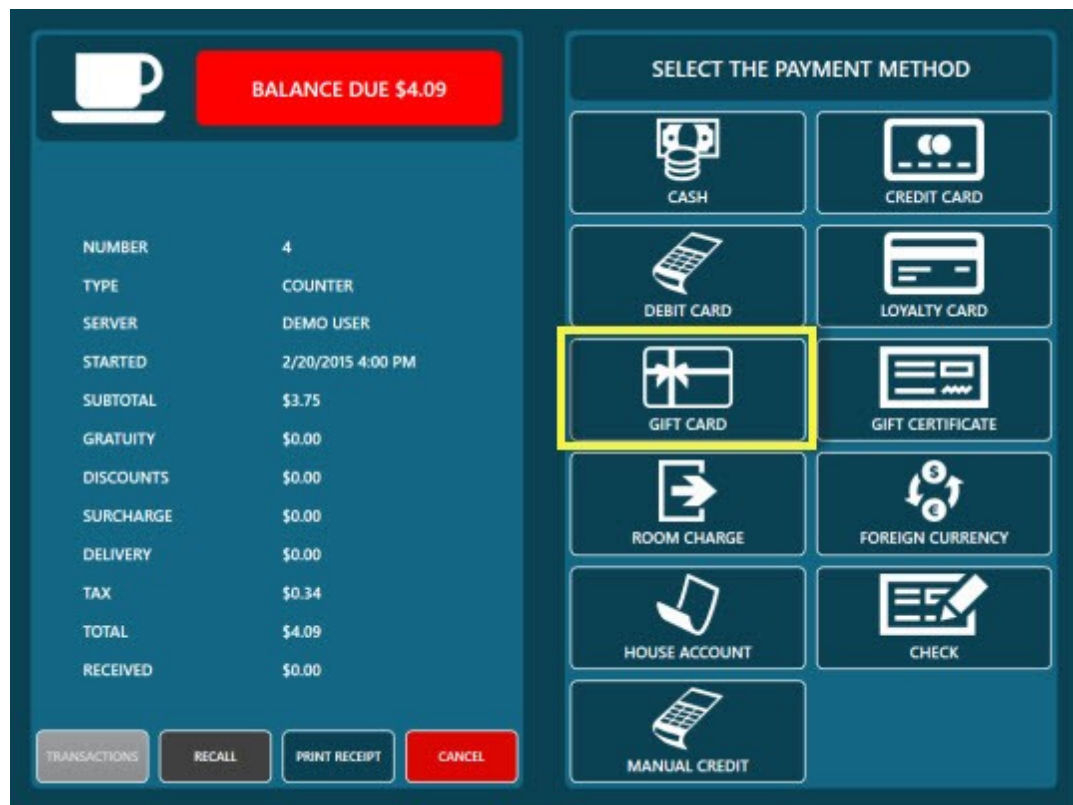
Log

The log maintains a list of XML requests sent to GIFTePay and XML responses received from GIFTePay. The log is useful for troubleshooting during initial setup.



20.4.2 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.



Gift Card Payment Method

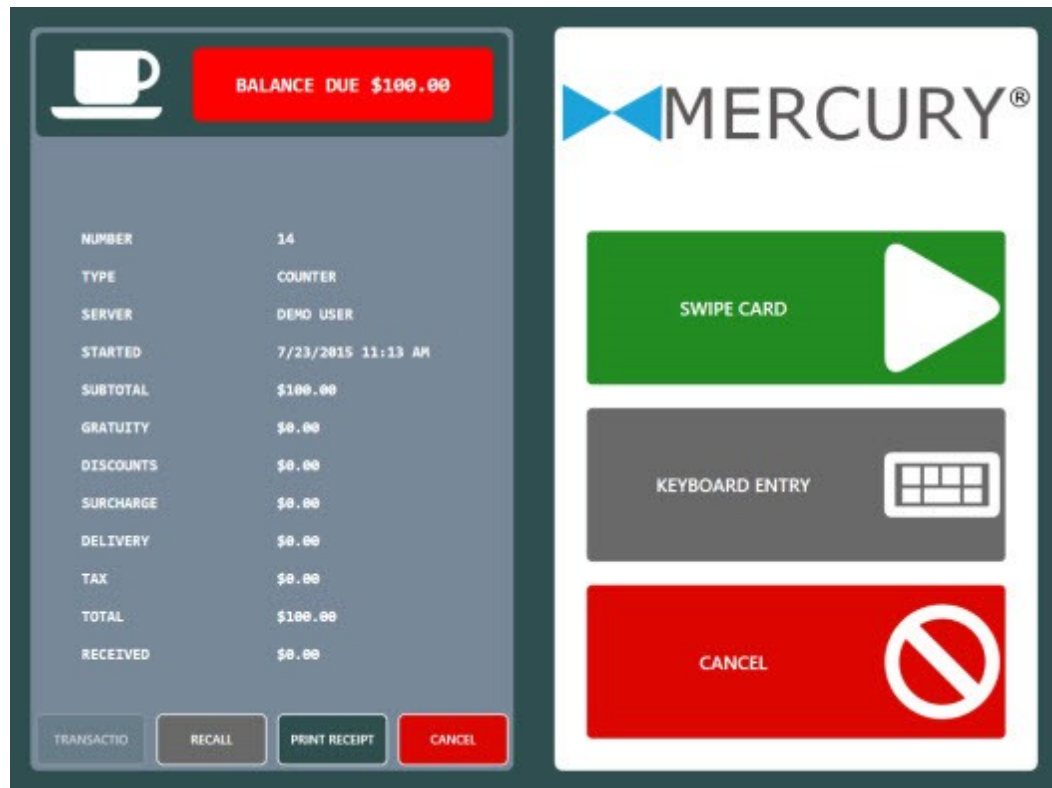
Enter the transaction amount. The maximum transaction amount is limited to the balance due on the order. In the example below, the user is prevented from continuing because the transaction amount is larger than the balance due.

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

Transaction Amount Entry

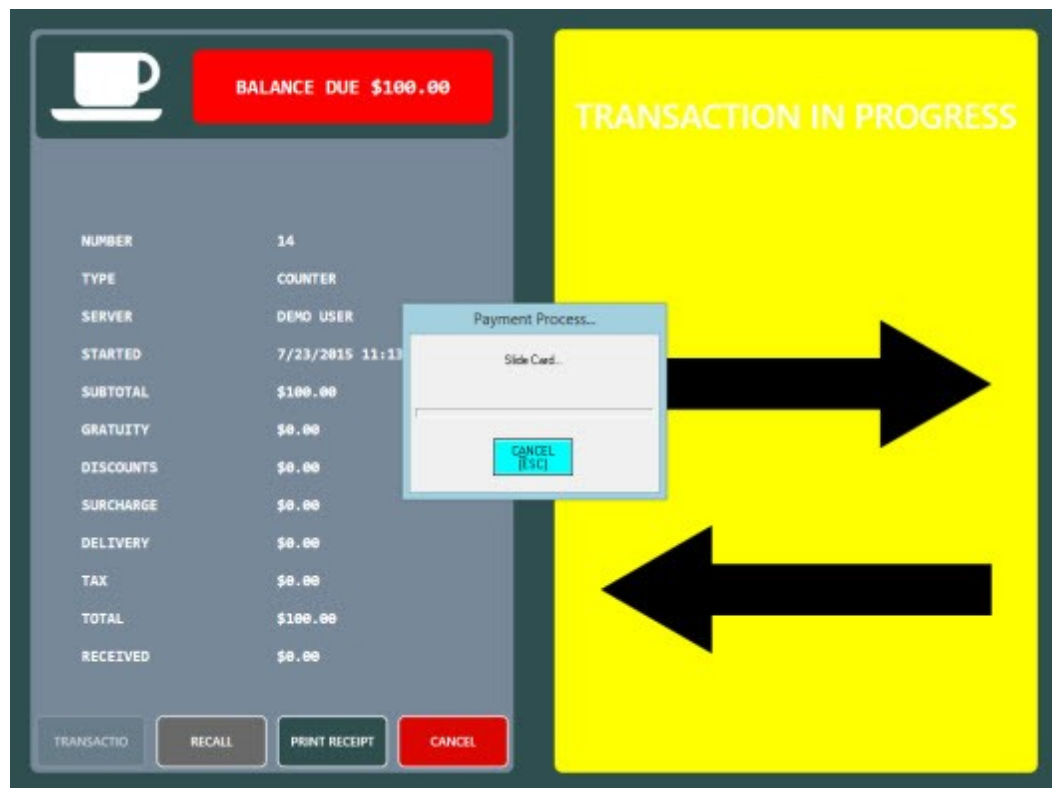
Transaction Amount Entry

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	6050110000012490790
TRAN CODE	MWFS SALE 605918
ORDER NUMBER	14
REFERENCE	605918
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 6050110000012498790

TRAN CODE NONSFSALE 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

BALANCE DUE \$42.78

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: NONSF SALE

ORDER NUMBER: 14


REFERENCE: [REDACTED]

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

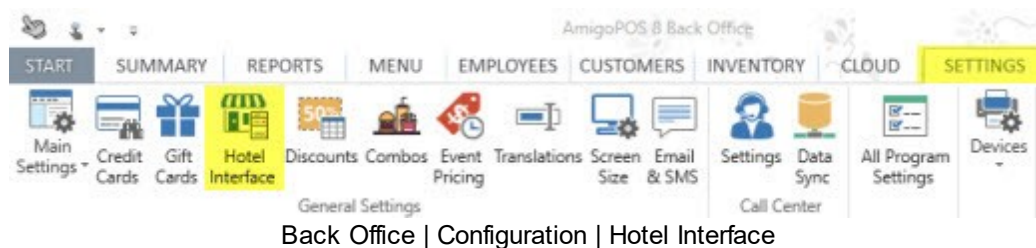
Hotel Interface

21 Hotel Interface

21.1 Micros/MSI

21.1.1 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	
<div>Settings Test Log</div>	
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
Interface*	
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](#)⁴⁷²⁾)

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.

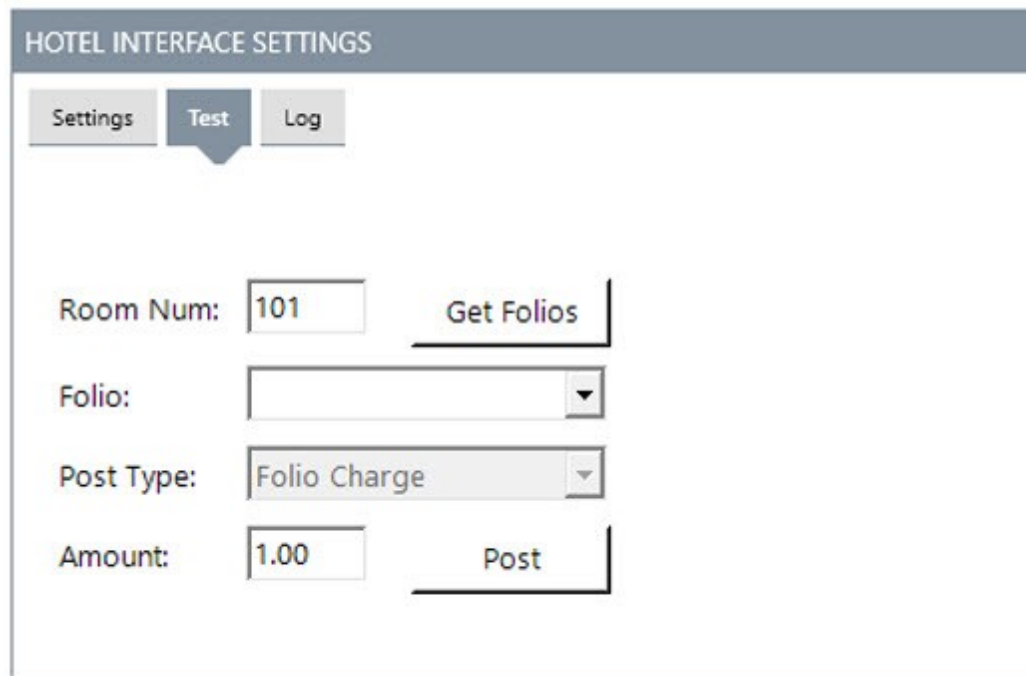
General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
Payment Types	Currency Shortcuts	Foreign Currency	Cash Payouts	Local Payment Types

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 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 Test Screen

21.1.2 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](#)^[502]. 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

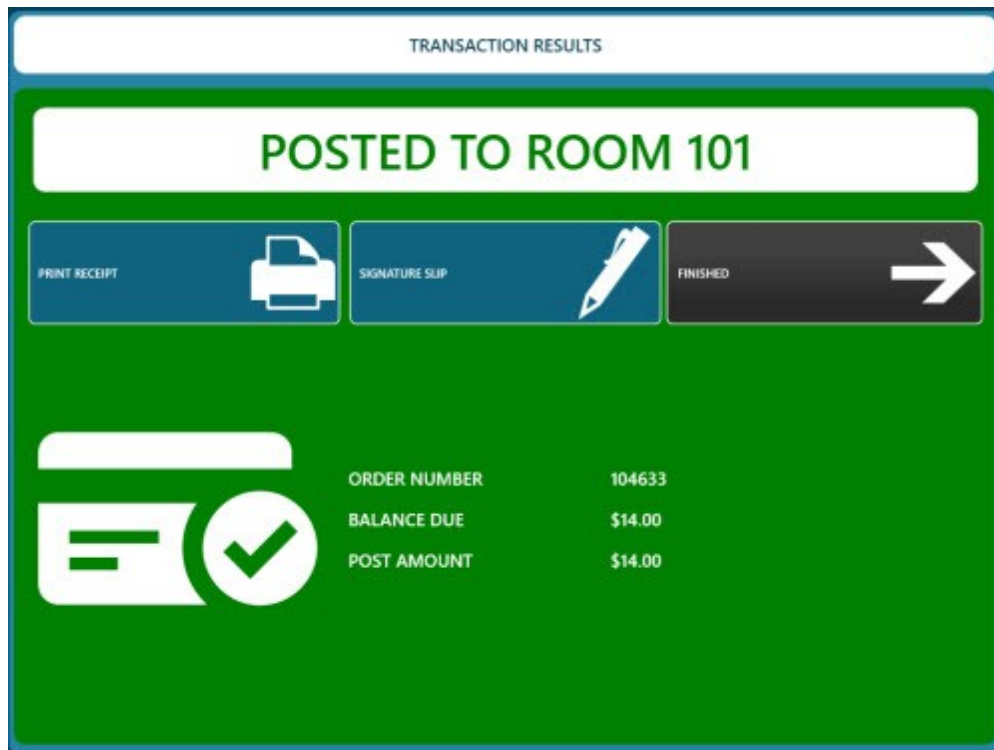
Step 3: Process Room Charge

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.

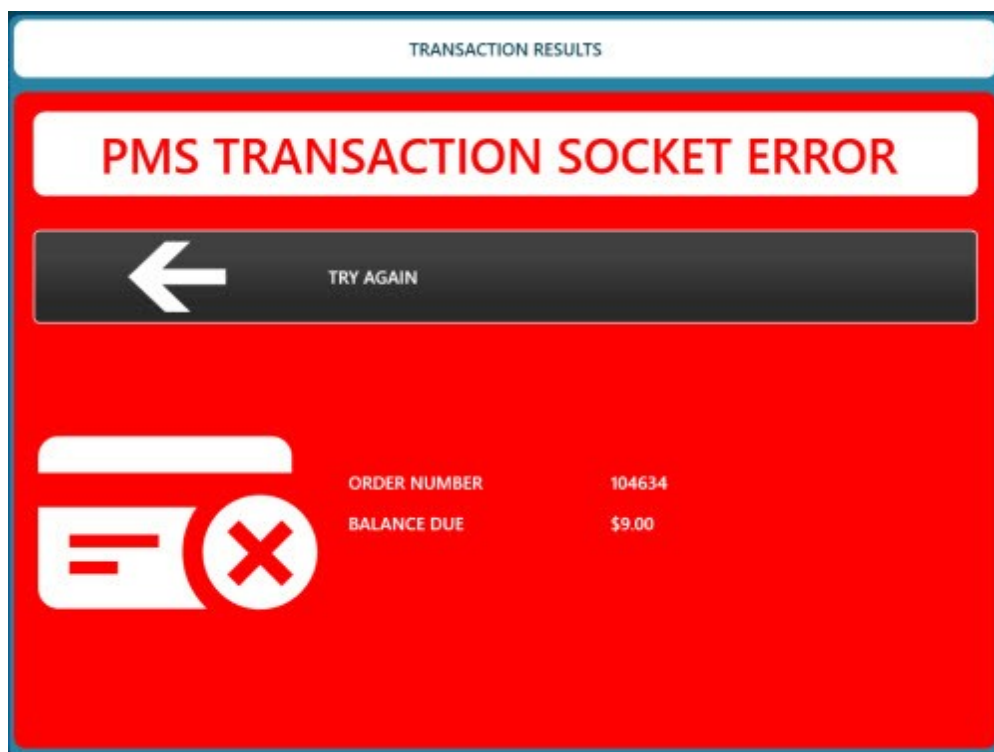
Verify that all information is correct before proceeding

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](#) ⁽⁵⁰²⁾ setting is set to **Yes**.



Successful Transaction Results



Transaction Error

21.1.3 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.



PLEASE WAIT

Room Num: 102

Folio:

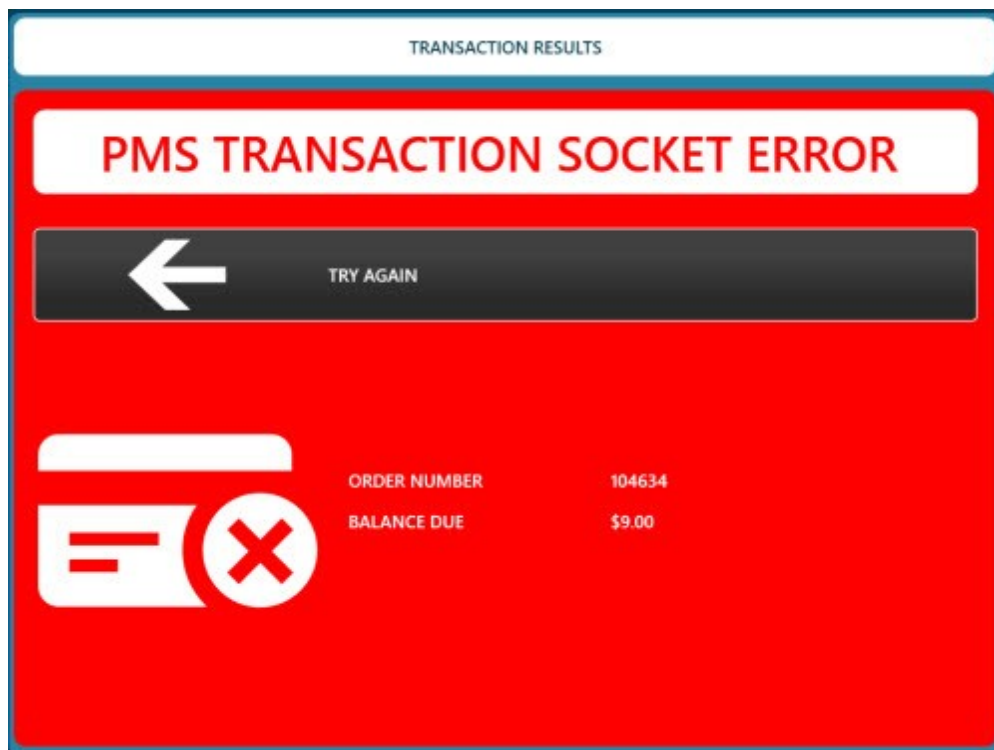
Post Type: Folio Charge

Amount:

Test In Progress



Connection Error



Folio Lookup Connection Error

21.2 Cloudbeds

21.2.1 Overview

[Cloudbeds](#) is property management software that helps hotels, hostels, vacation rentals and inns save time and automate operations. The AmigoPOS property management system interface can post transactions to Cloudbeds reservations directly from the settle screen. Orders are posted as custom items and appear on the guest's folio in real time.

Dashboard App Details API Documentation Calendar **Reservations** House Account

Payment Type: Hotel Collect Booking Rate Plan(s): Base Rate

Accommodations **Folio** Guest Details Credit Cards Notes (0) Documents Reservation Activity

Email Messages

ADD / REFUND PAYMENT ADD / ADJUST CHARGE

FILTER

Res #, Room #, Guest Name, Hou... From To Reservation ID: 7271626318

Description: MULTIPLE Group by: NONE Sub-group by: NONE Transactions: POSTED

APPLY CLEAR

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
7271626318	01/29/2019 10:02 PM	Alessandra Ambrosio	DQ(7)	take out - Amigo POS DQ(7)		1	20.90	
7271626318	01/28/2019 11:59 PM	Alessandra Ambrosio	DQ(7)	Room rate - Deluxe Queen DQ(7)			159.00	

21.2.2 Settings

Transactions are facilitated by the AmigoPOS cloud service. New users can obtain credentials by completing the form at <https://www.amigopos.com/CloudServices>. Open the [data service application](#), click the gear icon at the bottom right and enter your AmigoPOS credentials on the settings screen. Click Save Settings and minimize the data service application.

AmigoPOS Data Service

Shared Settings

Start with Windows Start minimized

Username (email used to login at amigopos.com): test@test.com

Password:

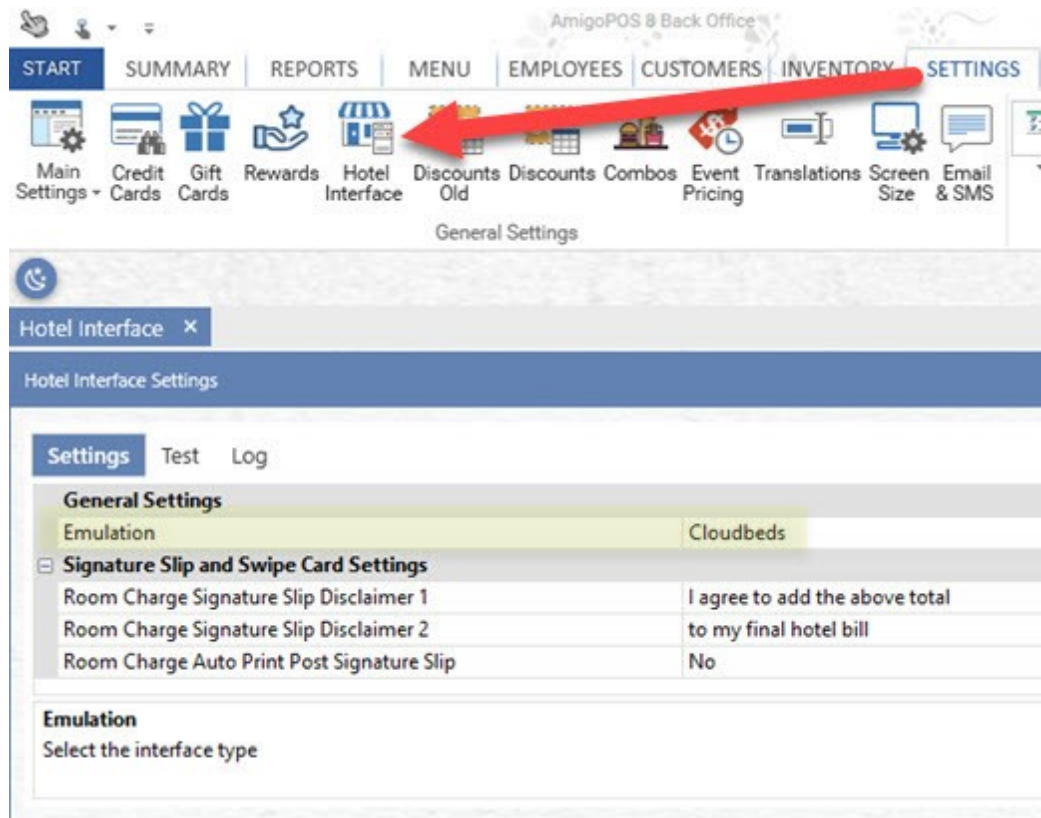
Merchant Id: ce782072-44f7-41b1-9212-650bb7e387dd

Store Id: 2774fec1-8408-4cf4-befc-6cfee6f783d9

Save Settings

Checking for new orders 1/29/2019 2:47:52 PM 8.14.2111

Open back office and navigate to Settings/Hotel Interface. Select Cloudbeds Emulation.

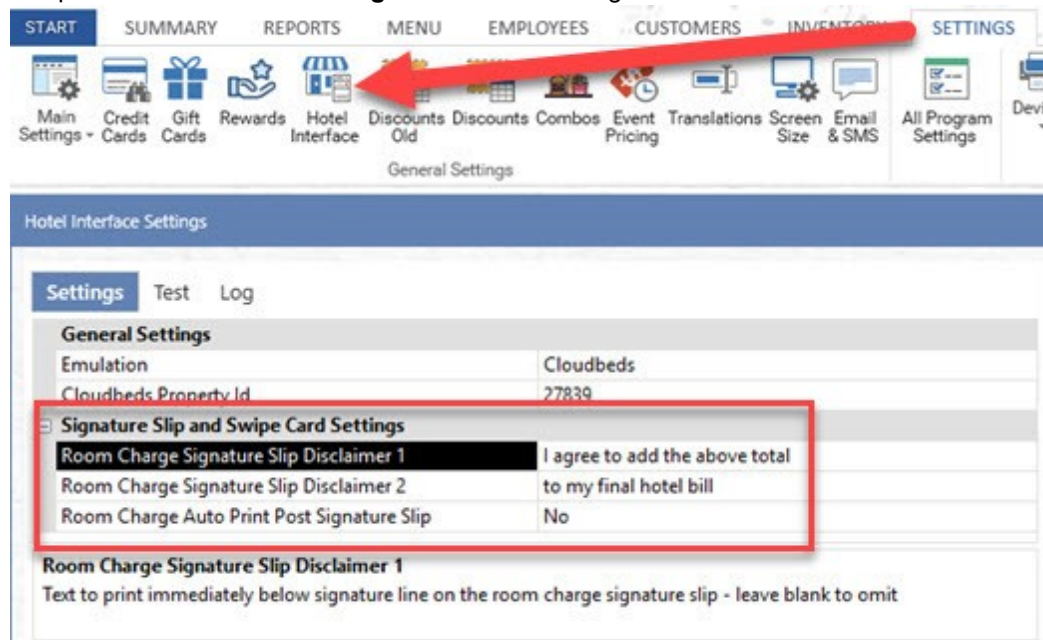


Navigate to Settings/Main Settings/Settle Screen and enable the Room Charge payment type.



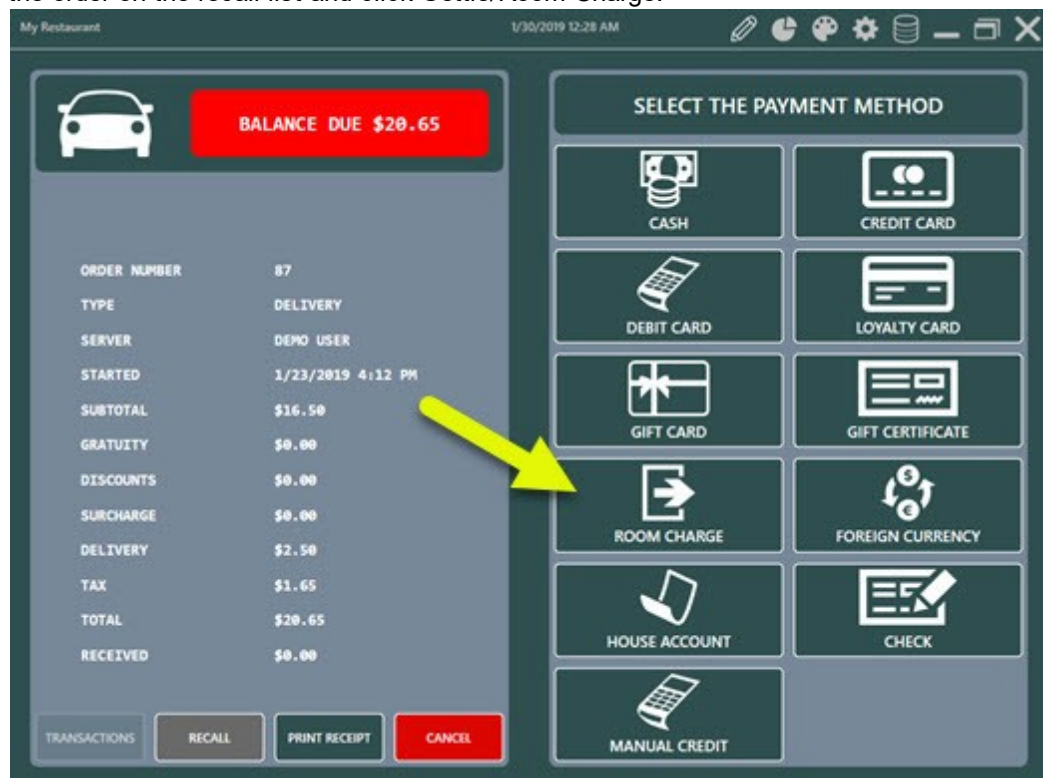
21.2.3 Signature Slip

A signature slip can be printed before or after the transaction is processed so that the customer can indicate the gratuity amount and sign the slip. The signature slip will print automatically after a successful post when the **Room Charge Auto Print** setting is enabled.

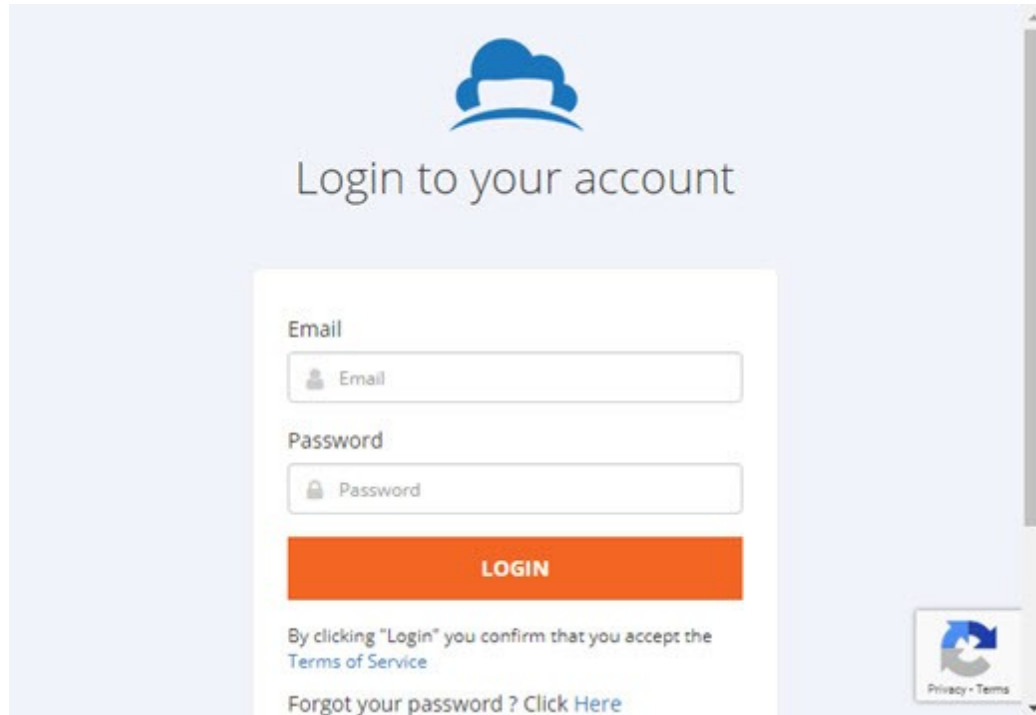


21.2.4 Usage

Select the order on the recall list and click Settle/Room Charge.



First time users should first allow the pos to access your Cloudbeds account by clicking the Cloudbeds Login button.



Cloud logo

Login to your account

Email

Person icon Email

Password

Lock icon Password

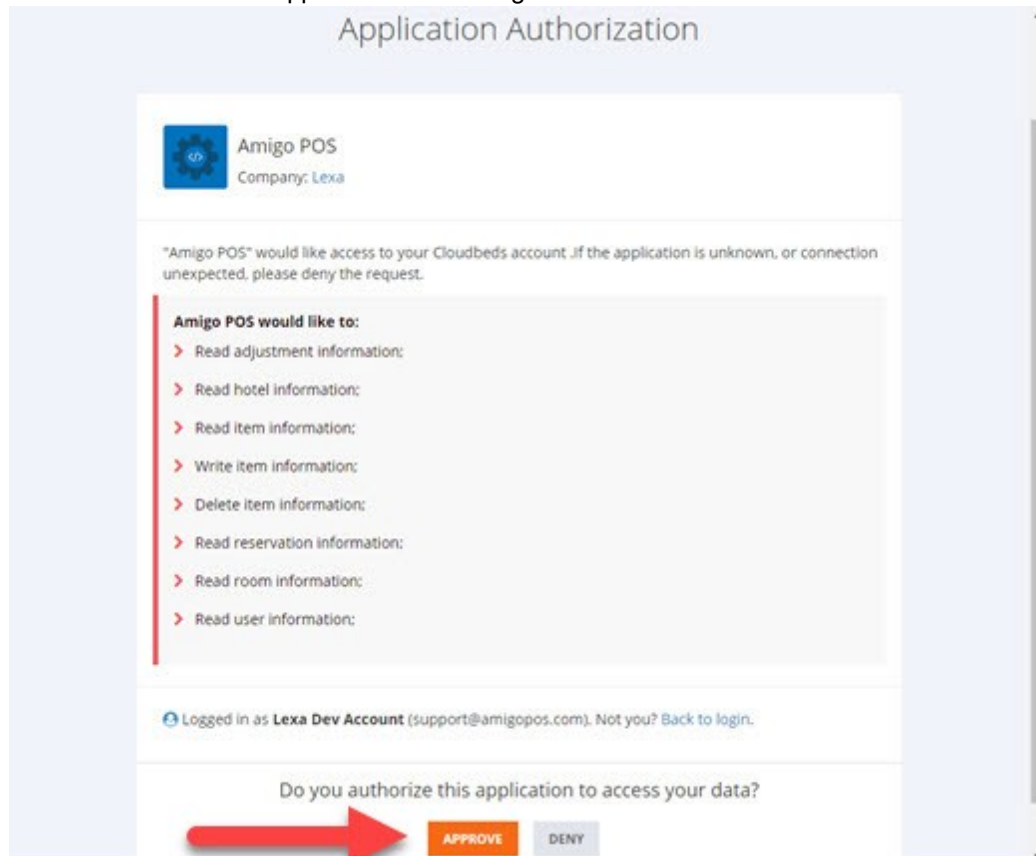
LOGIN

By clicking "Login" you confirm that you accept the [Terms of Service](#)


Forgot your password ? Click [Here](#)

[Privacy - Terms](#)

Login to the service and click Approve to allow AmigoPOS to access the data on the list.




Application Authorization

 Amigo POS
Company: Lexa

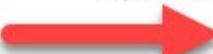
"Amigo POS" would like access to your Cloudbeds account. If the application is unknown, or connection unexpected, please deny the request.

Amigo POS would like to:

- > Read adjustment information;
- > Read hotel information;
- > Read item information;
- > Write item information;
- > Delete item information;
- > Read reservation information;
- > Read room information;
- > Read user information;

 Logged in as **Lexa Dev Account** (support@amigopos.com). Not you? [Back to login.](#)

Do you authorize this application to access your data?

 **APPROVE** **DENY**

Verify that the transaction amount and gratuity amount are correct. Select the reservation from the list and click the green button to process the transaction.

The screenshot shows the AmigoPOS interface with a reservation list on the left and transaction entry fields on the right. The reservation list includes details for Alessandra Ambrosio, Jeremy Bentham, Rafael Blanes, and Al Capone. The transaction entry fields include a balance due of \$20.65, a gratuity of \$2.00, and a total charge of \$22.65. There are also buttons for Cloudbeds Login, GET RESERVATIONS, and CANCEL.

ROOM CHARGE		ORDER NO 87	\$20.65 BALANCE DUE
SELECT THE RESERVATION			
Alessandra Ambrosio ROOM DQ(7) RESERVATION ID 7271626318 STATUS CHECKED IN BALANCE \$943.25		ENTER THE AMOUNT (LESS GRATUITY) \$20.65	
Jeremy Bentham ROOM DQ(6) RESERVATION ID 8331495461 STATUS CONFIRMED BALANCE \$2,287.67		ENTER THE GRATUITY \$2.00	
Rafael Blanes ROOM DQ(1) RESERVATION ID 2294174904 STATUS CONFIRMED BALANCE \$780.98		SIGNATURE SLIP x [Signature] CHARGE \$22.65 →	
Al Capone ROOM DK(8) RESERVATION ID 3220428867 STATUS CONFIRMED BALANCE \$2,843.50		Cloudbeds Login [Icon] GET RESERVATIONS [Icon]	
Roberto Capone		HELP [Icon] CANCEL [Icon]	

21.2.5 Void Transaction

To void a Cloudbeds transaction, select the order on the recall screen, click Settle and click Transactions on the settle screen. Click Void next to the transactions, Void again to confirm and allow a few moments for a response from the server.

If the transaction void is successful, the room charge will be voided in the local database and the order will be reopened for settlement.

21.2.6 Connect

When using Cloudbeds for the first time or after a period of inactivity, Cloudbeds must give access to AmigoPOS before a transaction can be posted.

If AmigoPOS does not have access to Cloudbeds, a small red error alert will appear at the top center when attempting to load the reservations or post a transaction.

Click the blue Cloudbeds Login button, login to Cloudbeds and give access to AmigoPOS.

21.2.7 Disconnect

AmigoPOS can be disconnected from Cloudbeds by following the steps described at <https://myfrontdesk.cloudbeds.com/hc/en-us/articles/219774407-Disconnect-an-app-from-myfrontdesk>.

21.2.8 Notes & Limitations

Please note that the following limitations apply to the AmigoPOS Cloudbeds integration:

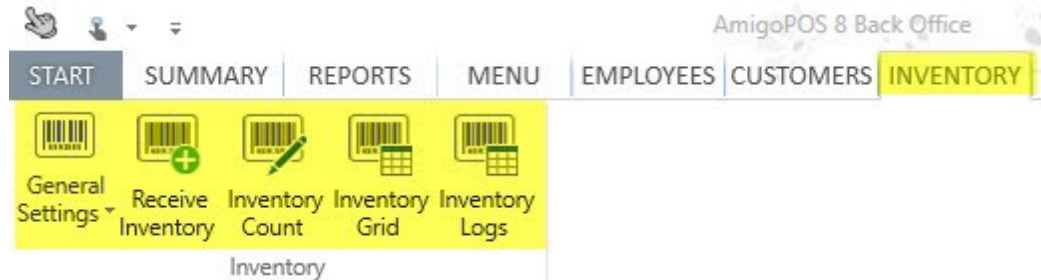
- The item price includes the tax for both VAT and non-VAT users
- Orders that are paid at the restaurant are not posted to the customer's room.
- Inventory is not synced with Cloudbeds

Inventory

22 Inventory

22.1 Inventory Items

AmigoPOS includes the ability to track inventory for all regular menu items, regular menu modifiers, bar menu items and bar menu modifiers. 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](#) ⁵²⁰

[Categories](#) ⁵²¹

[Suppliers](#) ⁵²²

[Inventory Units](#) ⁵²³

[Inventory Locations](#) ⁵²⁴

[Menu Recipes](#)

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

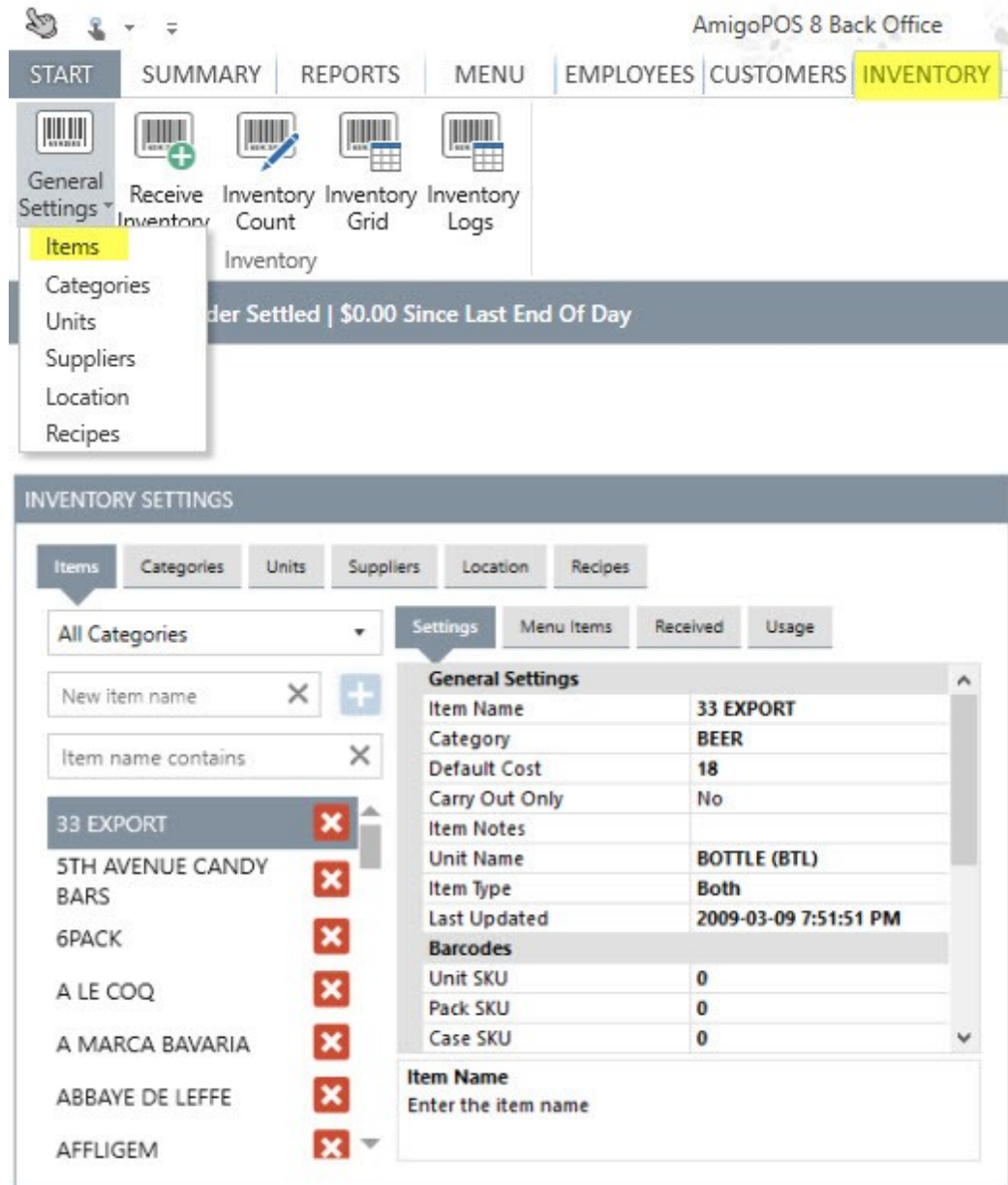
Case SKU: The SKU on a single case containing this inventory item

Reorder Level: The minimum quantity that must exist before an alert is generated

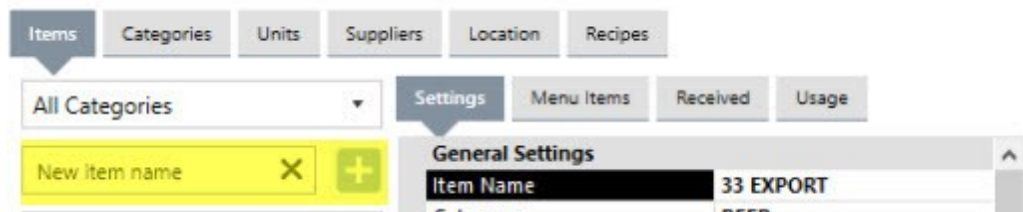
Maximum Quantity: The maximum quantity that should be stocked before an alert is generated

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](#) ⁷²⁰ 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.



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](#)^[521], inventory [supplier](#)^[522], inventory [location](#)^[524] and inventory [unit](#)^[523] is defined before attempting to add a new inventory item.



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.

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 category name X +

Category Name	Remove
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 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 X +

ACME	X
ALLIANCE	X
BEER DISTRIBUTOR	X
BEER DISTRIBUTOR	X
GRF	X
KCL	X
KRAFT FOODS	X
SYSO FOODS	X
TOPPS	X

General Settings

Supplier Name	ACME
Disable	No
Address	
Phone	
Hours	
Additional Notes	
Preferred	No

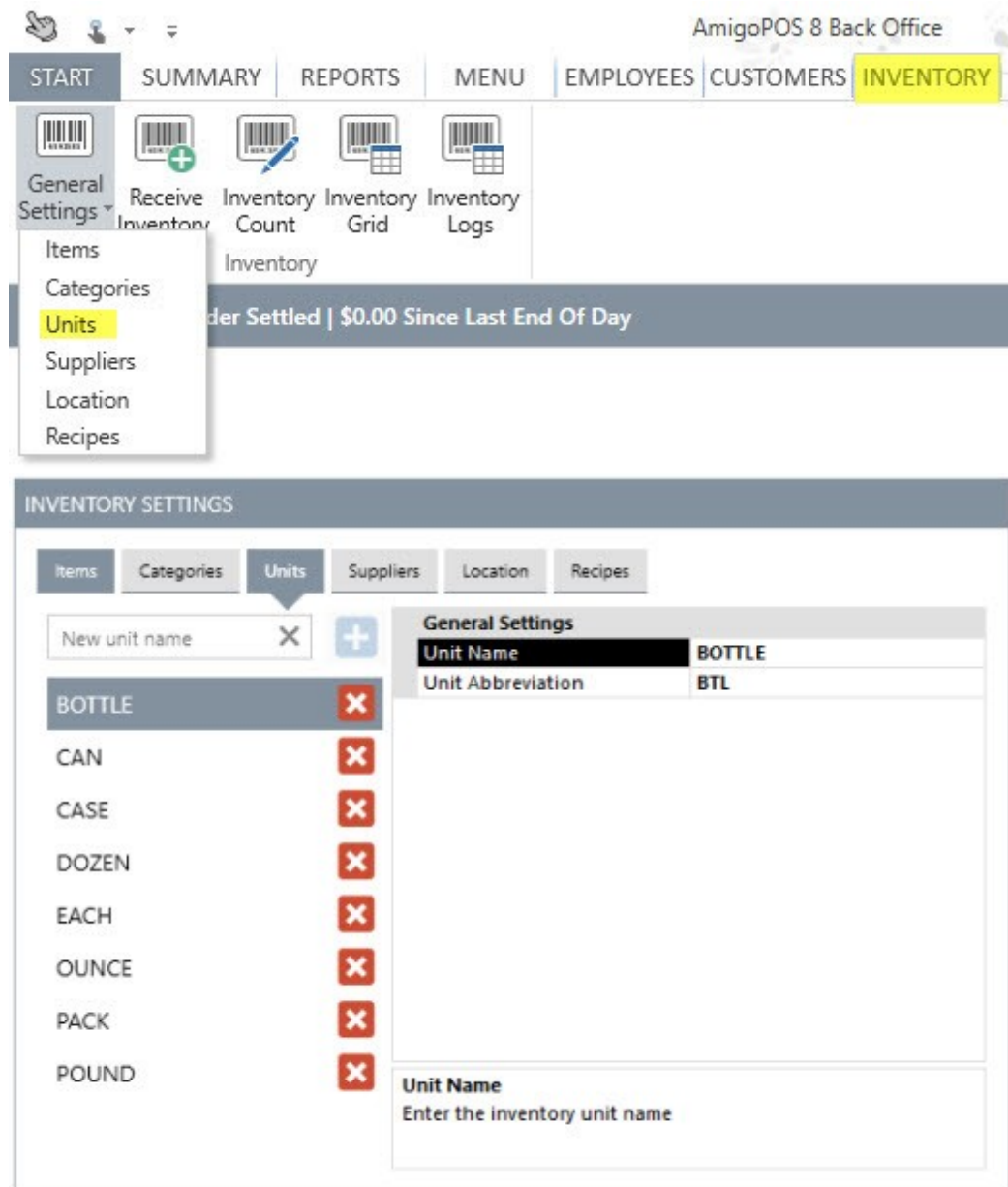
Supplier Name

Enter the inventory Supplier name

Inventory Suppliers

Inventory Units

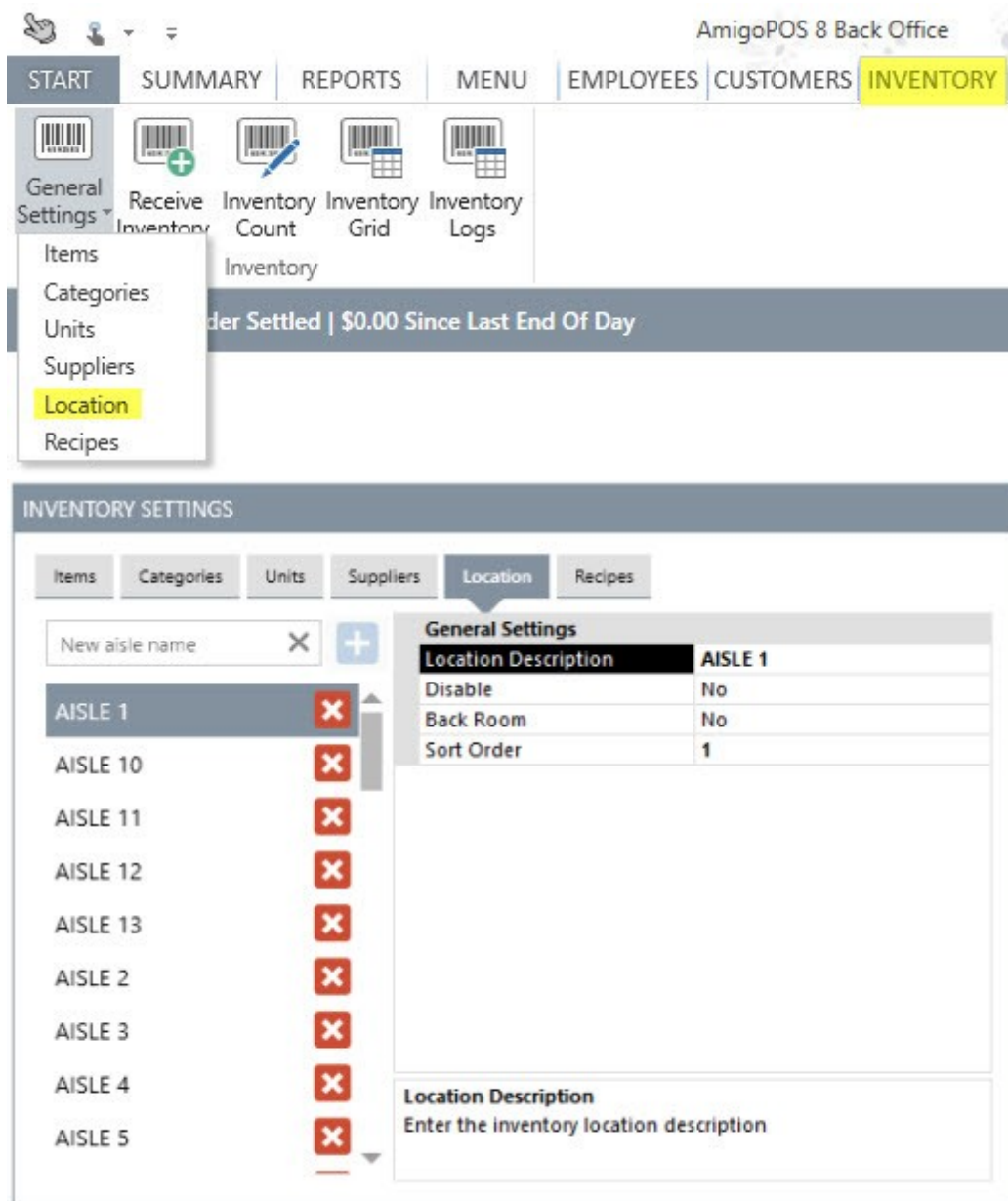
Inventory units are used to describe the quantity when entering recipes. Most retail items that are sold directly to the customer are sold as single units, described as Each in the list above. Other items that are mixed may be used by the ounce, dozen, gallon, etc. Enter the full name on the left and a short abbreviation in the right column; the abbreviation should be 3 characters or less to ensure that inventory mini reports print properly.



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.



Inventory Locations

22.2 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:

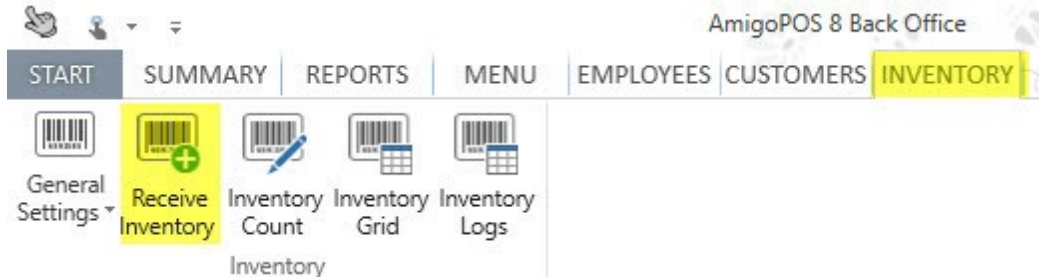
Total Cost = Unit Cost * Items Per Pack * Packs Per Case

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 X 🔍

Enter text to filter list X

☐ Keyboard Entry

33 EXPORT

5TH AVENUE CANDY BARS

6PACK

A LE COQ

A MARCA BAVARIA

ABBAYE DE LEFFE

AFFLIGEM

Vendor ACME ▼

Quantity ▼

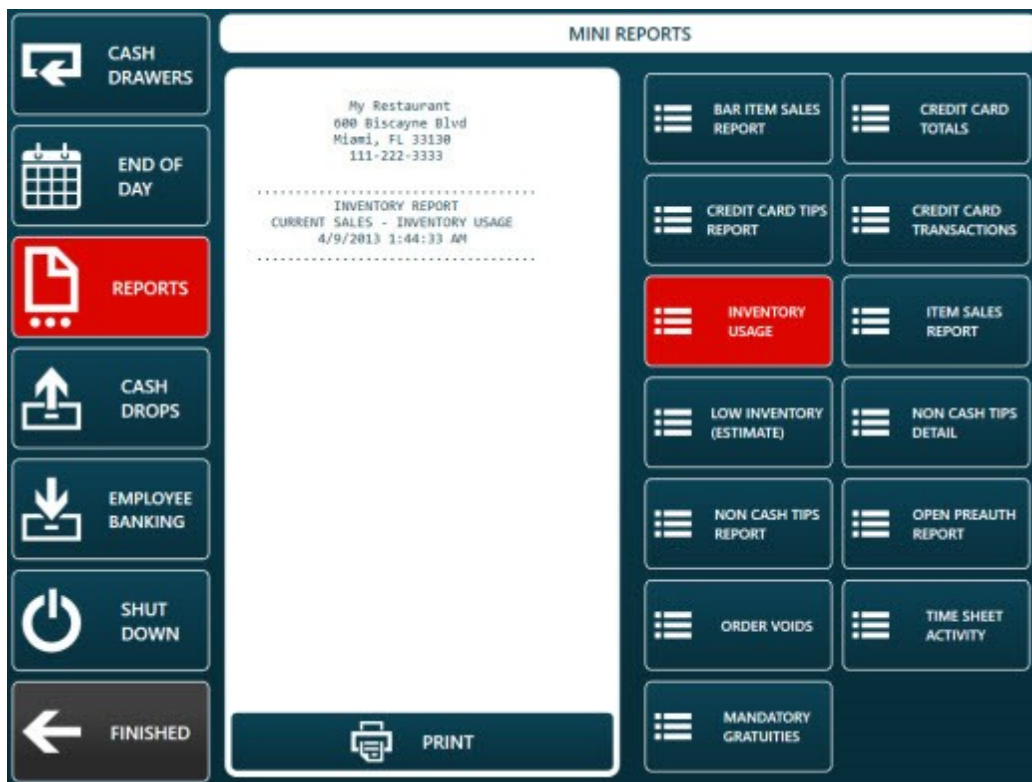
Invoice Number (optional) X

Total Cost

Receive New Inventory

22.3 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](#)²⁰⁶ 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.

22.4 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 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 & 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

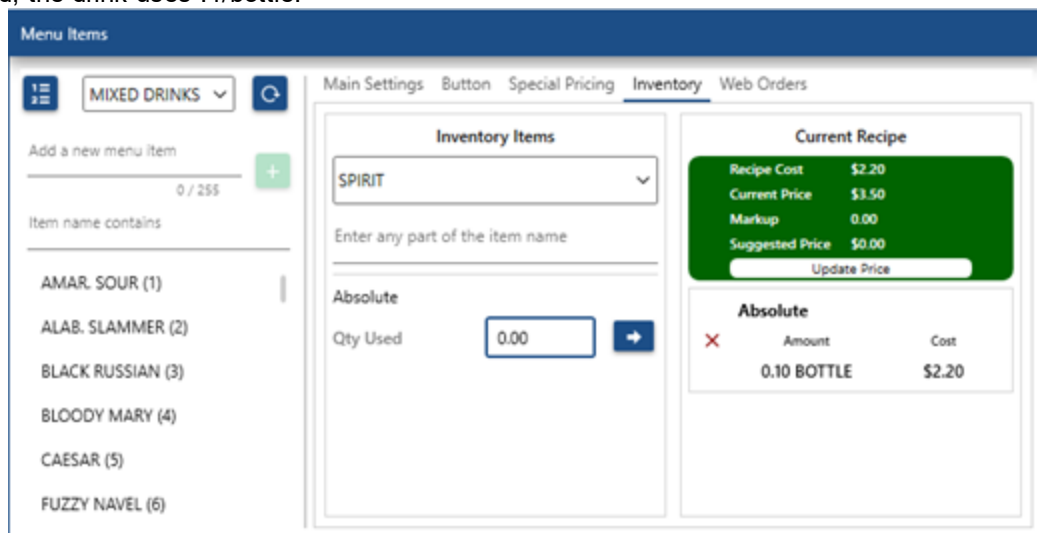
22.5 Bar Menu Upcharges

Bar menu item upcharges are used to modify a bar menu item. For example, the Top Shelf category in the AmigoPOS demo database contains the following upcharges:

1. DOUBLE
2. TRIPLE
3. UP
4. SHOT
5. TALL
6. SHORT



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.



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 the 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.

The screenshot displays the 'Menu Categories' interface. On the left, a list of menu categories is shown, with '27 TOP SHELF' selected. The main panel is titled 'Main Settings' and contains a table of settings for 'Upcharge 1'. The 'Upcharge 1 Inventory Adjustment' setting is highlighted with a red box and has a value of '2.00'.

Main Settings	
Upcharge 1 Enabled	<input checked="" type="checkbox"/>
Upcharge 1 Description	DOUBLE
Upcharge 1 Prefix	DBL
Upcharge 1 Suffix	
Upcharge 1 Inventory Adjustment	2.00
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....

Loyalty Cards

23 Loyalty Cards

23.1 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 | Devices | Magnetic Card Reader | Card Specifications**. Encode the cards as shown [here](#)^[540].

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

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.

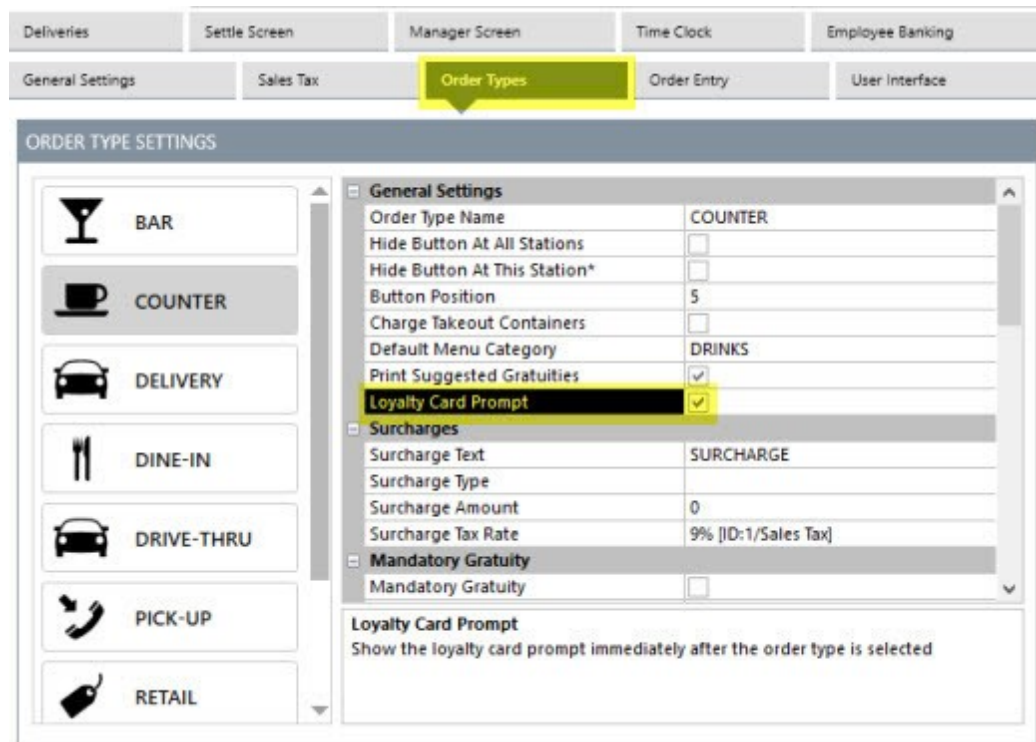
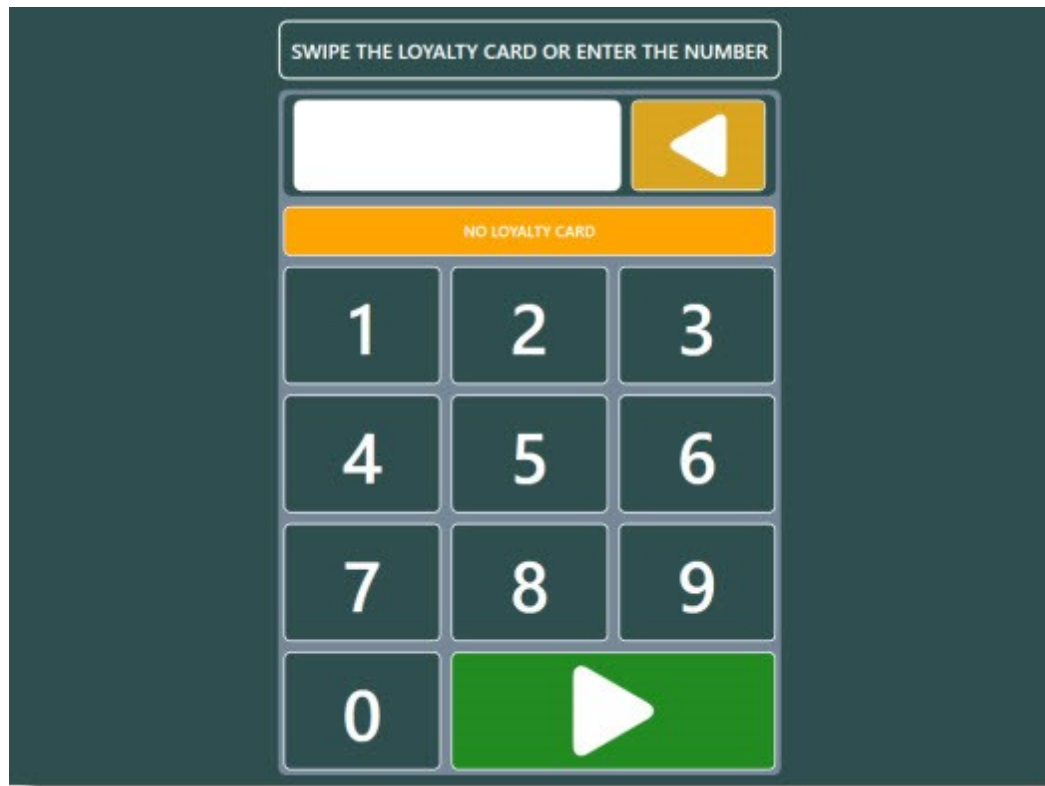
General Settings	Sales Tax	Order Types	Order Entry	User Interface
Deliveries	Settle Screen	Manager Screen	Time Clock	Employee Banking
Payment Types	Currency Shortcuts	Foreign Currency	Cash Payouts	Local Payment Types

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.



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
Order Entry Screen Loyalty Button	Yes
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

23.2 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 | Devices | Magnetic Card Reader as described in the [magnetic card reader configuration](#) ³³⁸ help topic.

Main Settings

24 Main Settings

24.1 General Settings

AmigoPOS enables the system administrator to access most program settings in Back Office | Settings | Main Settings. Most settings are shared by all computers and are only set once. Other settings, such as device ports, are not shared and must be configured on each computer independently. The **General Settings** screen 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.

General Settings	
Search	
Pos Station Identifier	
Station Id	1
Store Information	
Business Name	Demo Diner
Address	100 Queens Park
Address Line 2	
City	Toronto
Region	ON
Postal Code	M5S 2C6
Phone	111-222-3333
Email	my@email.com
Reporting	
Business Week Start Day	Sunday
Business Day Start Time	06:00 AM
Security	
Pos Auto Logout Interval	60
BackOffice Auto Logout Interval	90
Number Pad Input Limit	10
Allow Combine After Split	<input checked="" type="checkbox"/>
Assign Cash Drawers	<input type="checkbox"/>
Disable Archived Order Recall	<input checked="" type="checkbox"/>
Display Only Clocked In Servers	<input type="checkbox"/>
Print Fiscal Ticket Button Enabled	<input type="checkbox"/>
Station Id	
Select the station id. Each pos station must have a unique identifier.	

The following settings are available on the General Settings screen:

Pos Station Identifier

- Station Id: Select the station id. Each pos station must have a unique identifier.

Store Information

- Business Name: Business name to appear on reports
- Address: Business address to appear on reports
- Address Line 2: Business address line 2 to appear on reports
- City: Business city to appear on reports
- Region: Business state/region to appear on reports
- Postal Code: Business postal code to appear on reports
- Phone: Business phone number to appear on reports

- Email: Enter the reply-to email to use when sending emails.

Reporting

- Business Week Start Day: Select the first day of the business week
- Business Day Start Time: Business open time (enter 0:00 for 24 hours)

Security

- Pos Auto Logout Interval: Delay (in seconds) after logging in before auto-logout due to inactivity. Enter a value between 5 and 300 seconds. Set to 0 to disable.
- Back Office Auto Logout Interval: Delay (in seconds) after logging in before auto-logout due to inactivity. Enter a value between 5 and 300 seconds. Set to 0 to disable.
- Number Pad Input Limit: Enter the maximum number of characters allowed for number pad entry. This value includes the currency symbol and decimal separators.
- Allow Combine After Split: Check box to allow an order to be combined with other orders if the order was previously split
- Assign Cash Drawers: Assign cash drawers to users (2-drawer terminals)
- Disable Archived Order Recall: Check box to prevent an order from being recalled after the drawer is reset or the end of day is run
- Display Only Clocked In Servers: Check box to show only servers that are clocked in on the transfer order server list
- Print Fiscal Ticket Button Enabled: Check box to display the fiscal ticket button on the order recall list print menu
- Recall List My Orders Button Default: Check box to automatically toggle the My Orders button to All Orders when the recall list is loaded. This setting has no effect for users with AllowCrossEdit permission.
- Recall List Hide Open PreAuths: Check box to hide orders with open preauth transactions on the recall screen if the balance due is zero. This setting does not apply to open bar tabs.

Time Clock

- Print Clock In Confirmation: Print Confirmation After Clock In
- Print Clock Out Confirmation: Print Confirmation After Clock Out

Database

- Database Update Interval: Interval in hours to synchronize the local database with the server database at user login
- Force Database Update: This value is Check box when changes are made in back office to force the data service application to refresh the settings

24.2 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 | Manager. The settings are shared by all pos stations on the network. Review the [Cash Drawers](#)^[202] and [End of Day](#)^[205] help topics for additional information.

Drawer Reset

Manager Screen Settings

Drawer Reset End Of Day End of Day Reports Special Events Revenue Centers Buttons External Applications

Search

- ▼ Drawer Count
 - Show Drawer Count ☒
 - Blind Drawer Count ☐
- ▼ DrawerReport
 - Non-Cash Transactions ☒
 - Transaction Details ☐
- ▼ Drawer Reset
 - Hide Totals ☐
 - Open Drawer After Reset ☒
 - Print Report After Reset ☒
- ▼ Start Amount
 - Show Prompt ☐
 - Drawer 1 Start Amount 99.00
 - Drawer 2 Start Amount 88.00

Show Drawer Count
Check the box to force the manager to preform a manual drawer count when resetting the drawer

Drawer Count

- Show Drawer Count: Check the box to force the manager to preform a manual drawer count when resetting the drawer
- Blind Drawer Count: Check the box to hide the expected cash in drawer amount when performing the cash drawer count

Drawer Report

- Non-Cash Transactions: Check the box to display non-cash transactions on the cash drawer reset report. These transactions do not affect the cash in drawer total.
- Transaction Details: Check the box to display individual transactions on the cash drawer reset report

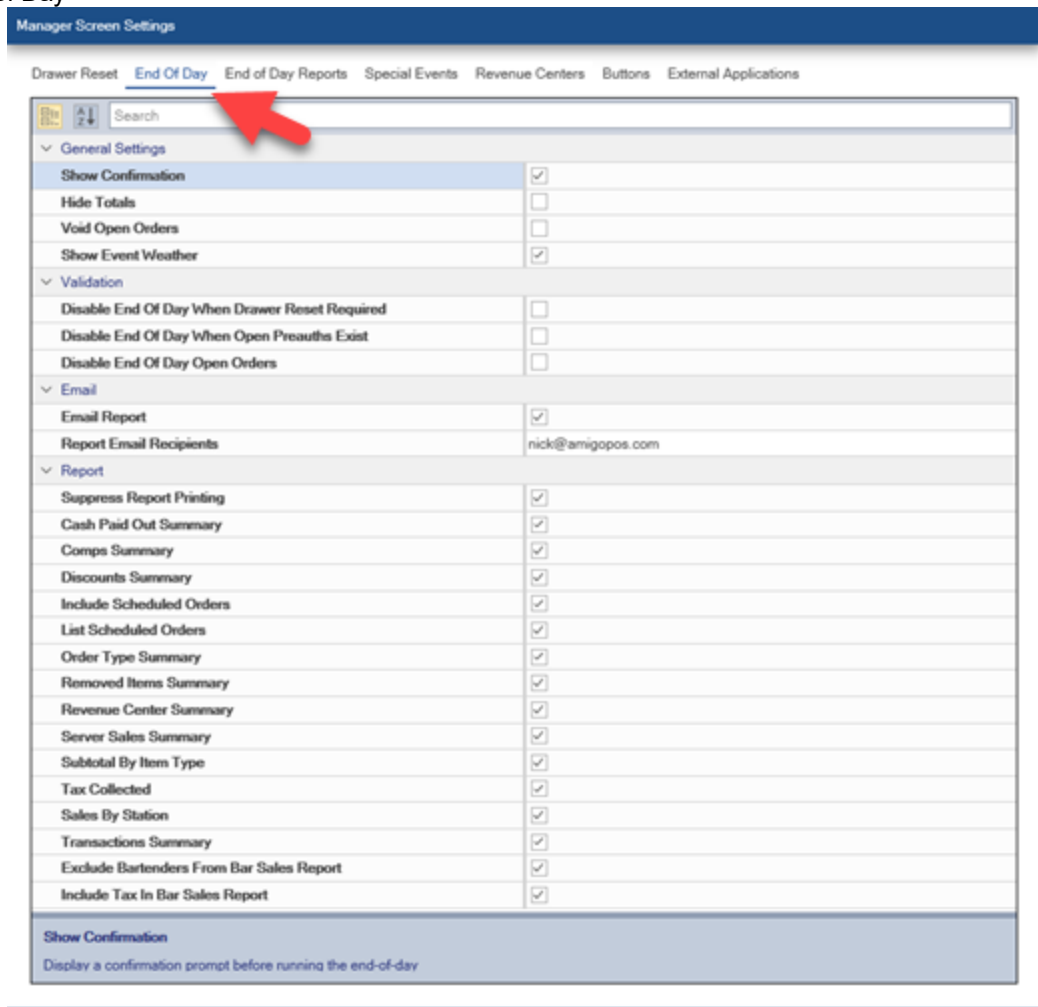
Drawer Reset

- Hide Totals: Check the box to hide the cash drawer reset report and transaction totals on the manager screen
- Open Drawer After Reset: Check the box to open the cash drawer after drawer reset. If the logged in user does not have drawer open permission, the override screen will appear.
- Print Report After Reset: Check the box to automtically print the drawer report when resetting the cash drawer. This report is archived and can be printed later in Back Office.

Start Amount

- Show Prompt: Check the box to prompt user to enter the start amount each time the cash drawer is reset at this pos station
- Drawer 1 Start Amount: Enter the start amount for cash drawer 1 at this pos station
- Drawer 2 Start Amount: Enter the start amount for cash drawer 2 at this pos station

End of Day



Manager Screen Settings

Drawer Reset End Of Day End of Day Reports Special Events Revenue Centers Buttons External Applications

Search

General Settings

Show Confirmation	<input checked="" type="checkbox"/>
Hide Totals	<input type="checkbox"/>
Void Open Orders	<input type="checkbox"/>
Show Event Weather	<input checked="" type="checkbox"/>

Validation

Disable End Of Day When Drawer Reset Required	<input type="checkbox"/>
Disable End Of Day When Open Preauths Exist	<input type="checkbox"/>
Disable End Of Day Open Orders	<input type="checkbox"/>

Email

Email Report	<input checked="" type="checkbox"/>
Report Email Recipients	nick@amigopos.com

Report

Suppress Report Printing	<input checked="" type="checkbox"/>
Cash Paid Out Summary	<input checked="" type="checkbox"/>
Comps Summary	<input checked="" type="checkbox"/>
Discounts Summary	<input checked="" type="checkbox"/>
Include Scheduled Orders	<input checked="" type="checkbox"/>
List Scheduled Orders	<input checked="" type="checkbox"/>
Order Type Summary	<input checked="" type="checkbox"/>
Removed Items Summary	<input checked="" type="checkbox"/>
Revenue Center Summary	<input checked="" type="checkbox"/>
Server Sales Summary	<input checked="" type="checkbox"/>
Subtotal By Item Type	<input checked="" type="checkbox"/>
Tax Collected	<input checked="" type="checkbox"/>
Sales By Station	<input checked="" type="checkbox"/>
Transactions Summary	<input checked="" type="checkbox"/>
Exclude Bartenders From Bar Sales Report	<input checked="" type="checkbox"/>
Include Tax In Bar Sales Report	<input checked="" type="checkbox"/>

Show Confirmation

Display a confirmation prompt before running the end-of-day

Various End of Day settings can be customized in back office | settings | main settings | manager. The database must be synchronized to apply any changes. The following settings are available under the General Settings tab:

General Settings

- Show Confirmation: Display a confirmation prompt before running the end-of-day
- Hide Totals: Check the box to hide the end of day report and sales totals on the manager screen

- Void Open Orders: Check the box to automatically void all open orders and associated transactions when performing end of day
- Show Event Weather: Prompt the manager to enter business day characteristics when performing end-of-day

Validation

- Disable End Of Day When Drawer Reset Required: Check the box to prevent the end of day from being run until all cash drawers have been reset
- Disable End Of Day When Open Preauths Exist: Check the box 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: Check the box to disable the End-Of-Day button when open orders exist

Email

- Email Report: Check the box to automatically email the end of day report(s) when the end of day is run
- 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.

Report

- Suppress Report Printing: Uncheck box 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.
- Cash Paid Out Summary: Check the box to show cash paid out summary on the end of day report
- Comps Summary: Check the box to show itemized comps summary on the end of day report
- Discounts Summary: Check the box to show itemized discounts summary on the end of day report
- Include Scheduled Orders: Check the box to include scheduled orders that have not been settled when calculating the end of day report totals
- List Scheduled Orders: Check the box to list scheduled orders that have not been settled on the end of day report totals
- Order Type Summary: Check the box to show sales by order type summary on the end of day report
- Removed Items Summary: Check the box to show deleted items summary on the end of day report
- Revenue Center Summary: Check the box to show sales by revenue center summary on the end of day report
- Server Sales Summary: Check the box to show sales by server summary on the end of day report
- Subtotal By Item Type: Check the box to show subtotal (tax not included) by item type summary on the end of day report

- Tax Collected: Check the box to show tax summary on the end of day report
- Sales By Station: Check the box to show sales by station summary on the end of day report
- Transactions Summary: Check the box to show revenue by transaction type summary on the end of day report
- Exclude Bartenders From Bar Sales Report: Check the box to exclude bartenders from the end of day bar sales report. Generally used for tip-out.
- Include Tax In Bar Sales Report: Check the box to include tax in bar sales report totals (applies to non-VAT users only)

The end of day reports list can be customized in back office | settings | main settings | manager. The database must be synchronized to apply any changes. The following settings are available for each report under the End of Day Reports tab:

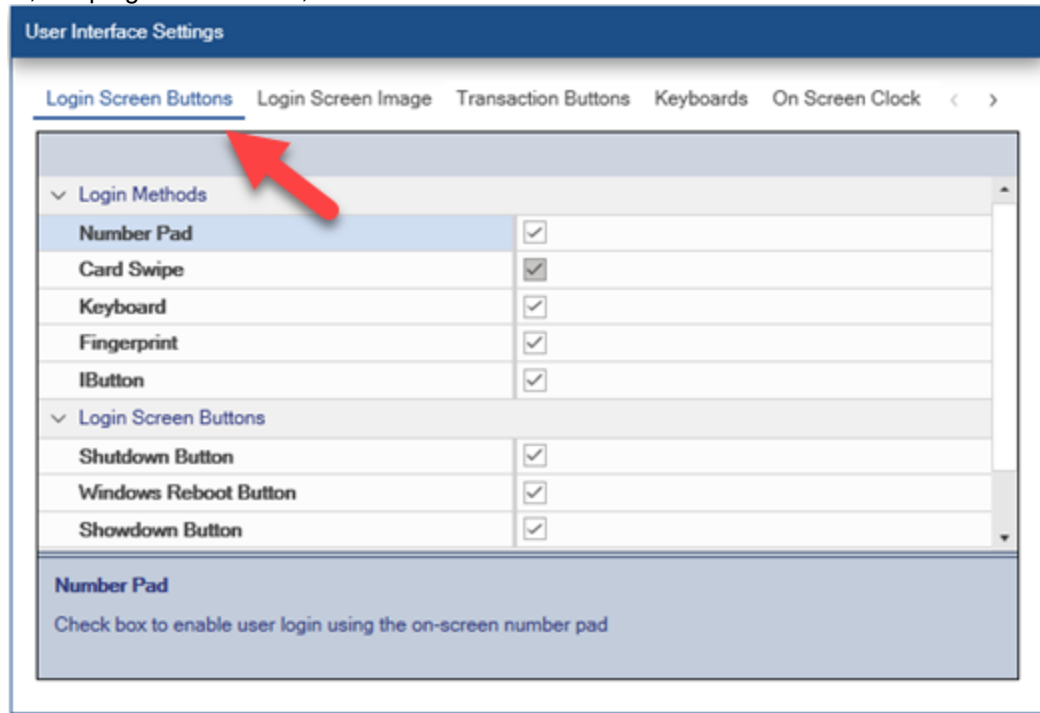
Manager Screen Settings				
Drawer Reset End Of Day End of Day Reports Special Events Revenue Centers Buttons External Applications				
REPORT NAME	BUTTON POSITION	AUTO PRINT/EMAIL	HIDE BUTTON	
BAR ITEM SALES REPORT	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CREDIT CARD TOTALS	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CREDIT CARD TIPS REPORT	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CREDIT CARD TRANSACTION	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
INVENTORY USAGE	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ITEM SALES REPORT	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
LOW INVENTORY (ACTUAL)	7	<input checked="" type="checkbox"/>	<input checked="" 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"/>	
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"/>	
REFUNDS	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

- 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/Email: Print this report automatically when the End Of Day is run and email the report if email is enabled
- Disable: Do not display the report on the manager screen reports list

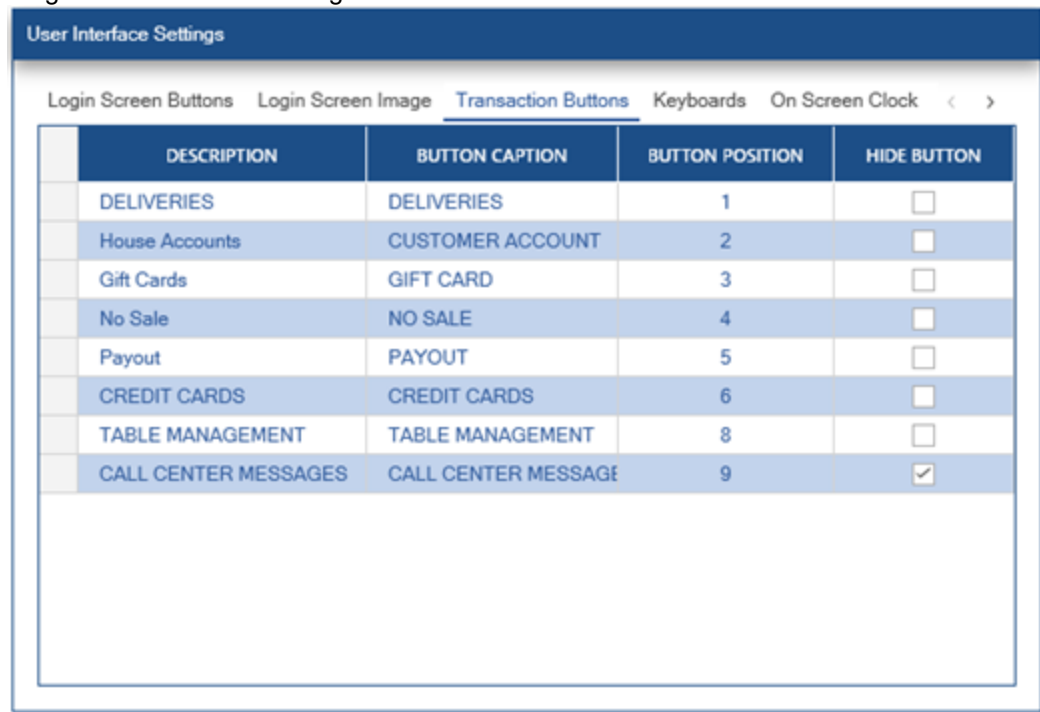
24.3 User Interface

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. The

login method settings determine the login types available when logging in to the pos or back office. In addition, the program shutdown, windows reboot and windows shutdown buttons can be enabled.



The **Transaction Buttons** settings are used to customize the appearance of the buttons that appear under the **TRANSACTIONS** button group on the right side of start screen. The buttons are used for performing transactions on existing orders.



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.

User Interface Settings

Login Screen Buttons

Login Screen Image

Transaction Buttons

Keyboards

On Screen Clock

<

>

On Screen Keyboard Translation

	English Character	Display Character
	a	a
	b	b
	c	c
	d	d
	e	e
	f	f
	g	g
	h	h
	i	i
	j	j
	k	k

Menu Setup & Usage

25 Menu Setup & Usage

25.1 Typical Menu Setup

The first step in designing the menu is to create menu categories. For easier setup and less repetition, the menu categories should be created based on the menu item modifiers, which may or may not correspond to the menu categories on the printed menu. When all of the items in a menu category share the same modifiers, a single menu item can be added to each menu category and then copied as required to create the additional menu items.

The video below describes the simplest case of creating the first menu category in a new database with no demo data. Modifiers are created, a single menu item is added to the menu category and then copied multiple times to create the additional menu items.

Video timeline:

0:00 Start the data service application and create a new database

1:15 Create a new menu category

1:30 Create modifier groups

1:58 Create modifier levels

2:22 Add modifiers to the modifier groups

4:22 Assign modifier levels to a modifier group

4:45 Create a new menu item

4:55 Assign modifier groups to the new menu item

5:25 Copy the menu item to create 3 additional menu items

6:55 Verify that the menu category and items are displayed correctly on the order entry screen

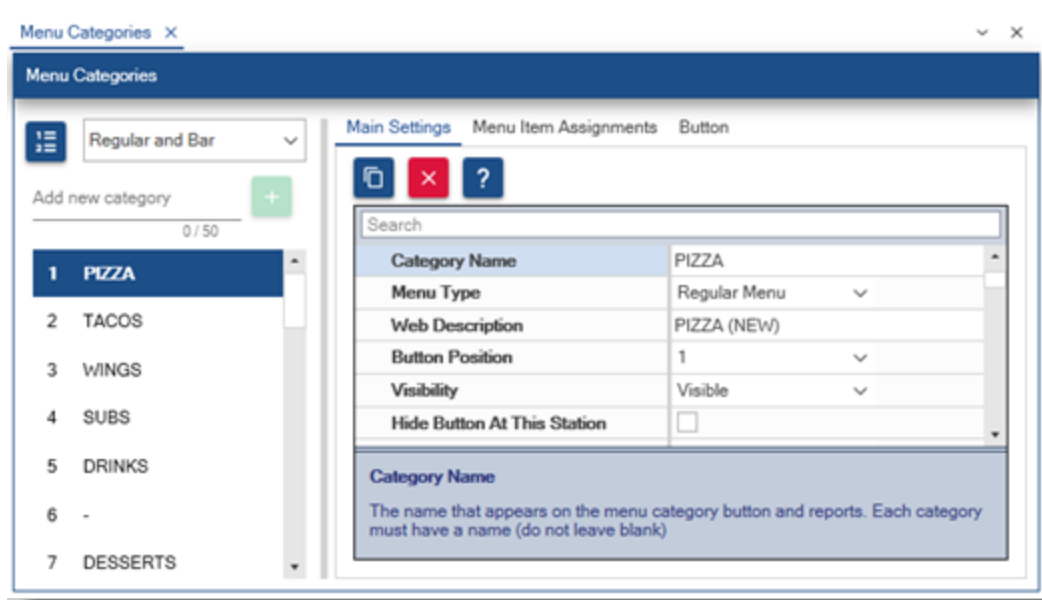
25.2 Menu Categories

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 green + 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.



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

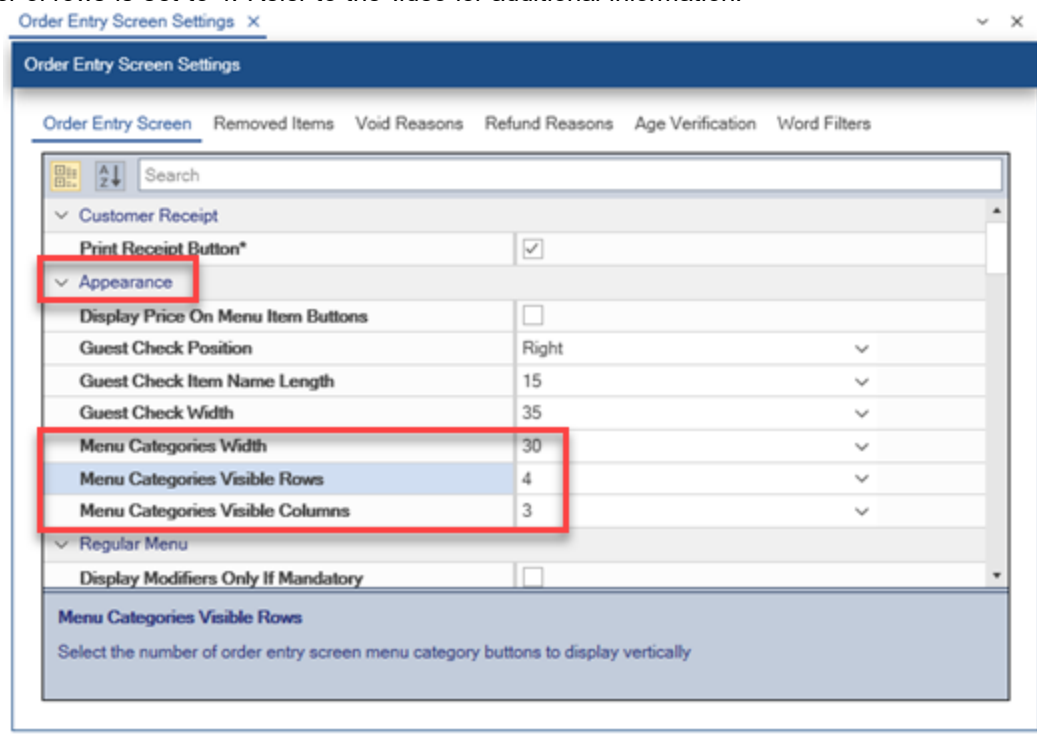
- **Inventory Markup:** This value is used when calculating the recommended price on the inventory recipe editor (only for menu items in this category)
- **Exclude From Special Pricing:** Check the box to exclude all menu items in this category from special pricing
- **Exclude From Event Pricing:** Check 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 1-7:** 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)

Button Size

The number of visible menu category button rows and columns can be adjusted in **back office | settings | main settings | order entry screen**. In the images below, the number of columns is set to 3 and the number of rows is set to 4. Refer to the video for additional information.





25.3 Regular Menu

25.3.1 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.

To add a new menu item, enter the menu item name, select a menu category and click the green + button to save the new menu item.

The screenshot shows the 'Menu Items' window with the 'Main Settings' tab selected. On the left, there is a list of menu items: 'FRENCH FRIES (1)' and 'ONION RINGS (2)'. The 'FRENCH FRIES (1)' item is selected. The 'Main Settings' tab displays the following information:

General Settings	
Item Name	FRENCH FRIES
Item Name (Language 2)	
Menu Category	APPETIZERS
Add to Retail Favorites	<input type="checkbox"/>
Prep Text	FRIES
Prep Text (Language 2)	

Below the table, there is a section for 'Item Name' with the instruction: 'Enter the name to appear on the order entry screen button and customer receipt'.

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 Settings** tab. If an existing menu item was not copied, all values are default (most common) and may require modification.

This screenshot is similar to the one above, but it includes a red arrow pointing to the 'Copy Selected' button (represented by a document icon with a plus sign) in the top toolbar of the 'Main Settings' tab. The rest of the interface and the data in the 'General Settings' table are identical to the previous screenshot.

Pricing

Click the Pricing heading to access most common price settings. Ensure that the price and tax rate are correct. Other values can be disregarded if not applicable to the selected menu item..

The screenshot shows the 'Menu Items' setup window. On the left, there's a sidebar with a search bar and a list of items: 'FRENCH FRIES (1)' and 'ONION RINGS (2)'. The main area is titled 'Menu Items' and has tabs for 'Main Settings', 'Button', 'Price Rules', 'Special Pricing', 'Modifiers', and 'Inventory'. The 'Main Settings' tab is active, showing a table of pricing options. Below the table is a section for 'Item Name' with a description.

Pricing	
Price	1.75
Tax Rate	10% (ID:1/SALES TAX)
Container Charge	0.00
Bottle Deposit	0.00
SKU	0
Time Based Pricing	<input type="checkbox"/>
Time Interval	0
PLU	0
Sold By Weight	<input type="checkbox"/>
Price By Weight Multiplier	1.0000
Price By Weight Suffix	
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"/>

Item Name
Enter the name to appear on the order entry screen button and customer receipt

The following fields are available under the **Pricing** heading:

- **Price:** Enter the regular price. Vat tax users should include tax in the price.
- **Tax Rate:** Select the sales tax rate.
- **Container Charge:** Amount to charge for the takeout container. The container charge is applied only if order type is set to charge for takeout containers.
- **Bottle Deposit:** Amount to charge for the bottle deposit. The bottle deposit is applied only if order type is set to charge for takeout containers.
- **SKU:** Enter the barcode without the end sentinel
- **Time Based Pricing:** Item is priced per time interval selected below. For example, set the price to 10 cents and select the minute interval to charge 10 centes per minute. Useful for pool tables.
- **Time Interval:** Select the time interval to use when time based pricing is enabled. The accrued time is rounded up to the next unit. For example, when the time interval is set to hours, 90 minutes is rounded up to 2 hours.
- **PLU:** When using random-weight barcodes, enter the numeric PLU from the scale's PLU list.

- **Sold By Weight:** Check the box to indicate that the item is sold by weight using a random-weight barcode
- **Price By Weight Multiplier:** The menu item price is divided by the multiplier to determine the price per scale unit. For example, if the default unit of weight is the kilogram and the item price is per 1/2 kilogram, enter .5. In most cases the item is sold by the default weight and the multiplier should be set to 1.
- **Price By Weight Suffix:** Text value to print after the item name on the customer receipt.
- **Exclude From Special Pricing:** If checked, item will be ignored when calculating special pricing, even when the item has a special price definition that is in effect.
- **Exclude From Event Pricing:** If checked, the item price will not be adjusted when event pricing is in effect.
- **Exclude from Discounts:** If checked, item will be ignored when calculating discounts, even when the item has a discount assigned.
- **Exclude From Combos:** If checked, item will be ignored when calculating combo pricing, even when the item has a combo definition that is in effect. For example, a combo that includes all items from the Pizza category can exclude specific pizzas from being included when applying the combo discount

Availability

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

PIZZA

Add a new menu item

0 / 255

Item name contains

- SMALL CH & PEP (1)
- SM PIZZA (2)
- MED PIZZA (2)
- LG PIZZA (3)
- 2 SM CH PIZZA 1 TOPPING (3)
- XL PIZZA (4)**

Main Settings | Button | Price Rules | Modifiers | Inventory | Web Orders

Search

- > General Settings
- > Pricing
- > Prep Printers
- > Label Printers
- > Day/Time Availability

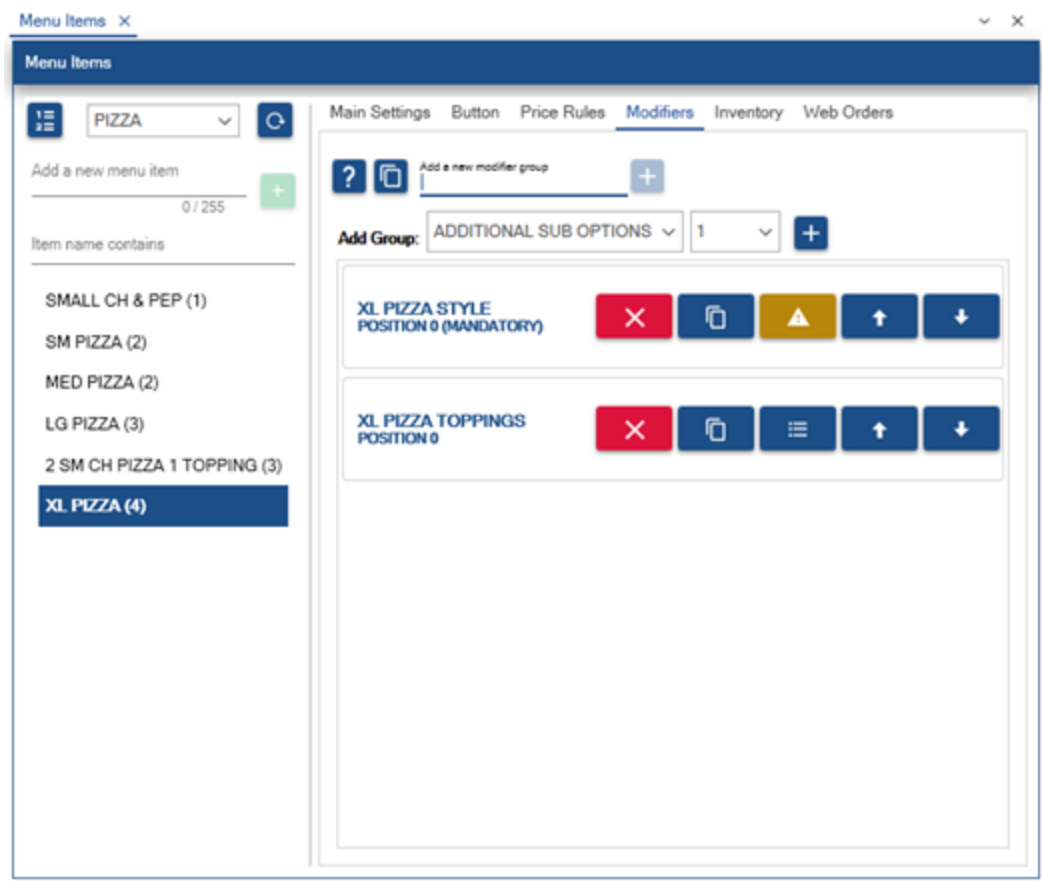
Time On	12:00 AM	🕒
Time Off	12:00 AM	🕒
Restrict Days	<input type="checkbox"/>	
Sunday	<input type="checkbox"/>	
Monday	<input type="checkbox"/>	
Tuesday	<input type="checkbox"/>	
Wednesday	<input type="checkbox"/>	
Thursday	<input type="checkbox"/>	
Friday	<input type="checkbox"/>	
Saturday	<input type="checkbox"/>	
- > Reporting

Item Name

Enter the name to appear on the order entry screen button and customer receipt

Modifiers

Menu item [modifiers](#) ⁵⁶⁷ 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.



Prep and Label Printers

Prep printer and label printer assignments are made by checking the box next to the specified prep or label printer.

Menu Items

PIZZA

Add a new menu item

0 / 255

Item name contains

- SMALL CH & PEP (1)
- SM PIZZA (2)
- MED PIZZA (2)
- LG PIZZA (3)
- 2 SM CH PIZZA 1 TOPPING (3)
- XL PIZZA (4)**

Search

> General Settings

> Pricing

> Prep Printers

Prep Printer	
Prep Printer 1	<input 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 11	<input type="checkbox"/>
Prep Printer 12	<input type="checkbox"/>

> Label Printers

Label Printer	
Label Printer 1	<input type="checkbox"/>
Label Printer 2	<input type="checkbox"/>
Label Printer 3	<input type="checkbox"/>
Label Printer 4	<input type="checkbox"/>
Label Printer 5	<input type="checkbox"/>

Item Name

Enter the name to appear on the order entry screen button and customer receipt

Reporting

Id: Read-only unique identifier used for custom sql queries and reports

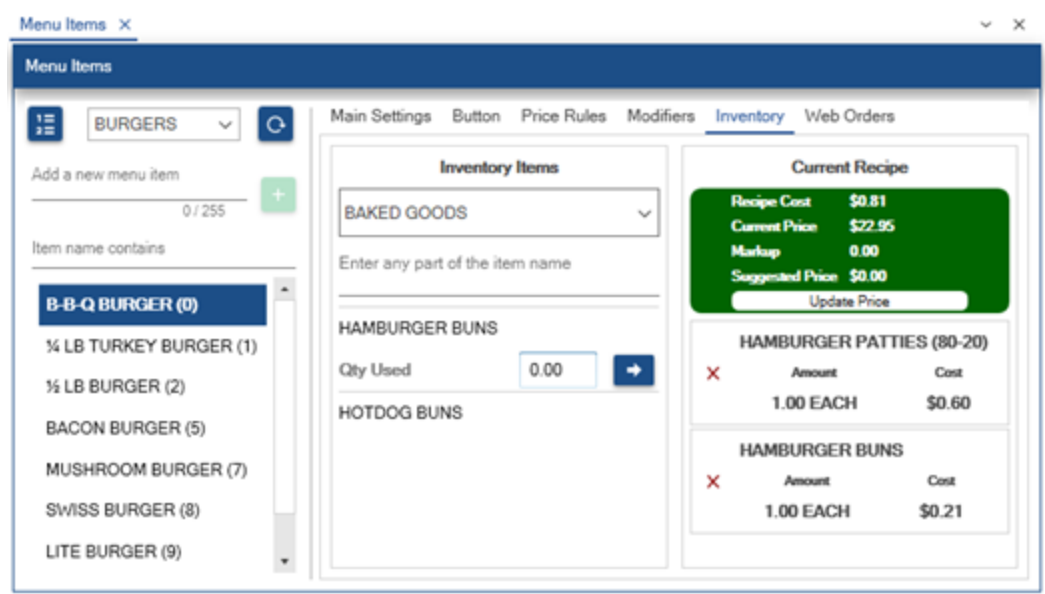
Revenue Center: Select the revenue center. The revenue center on used for various reports to summarize sales by revenue center.

ERP ID: 32-character field that can be used for ERP or custom business interfaces

Inventory

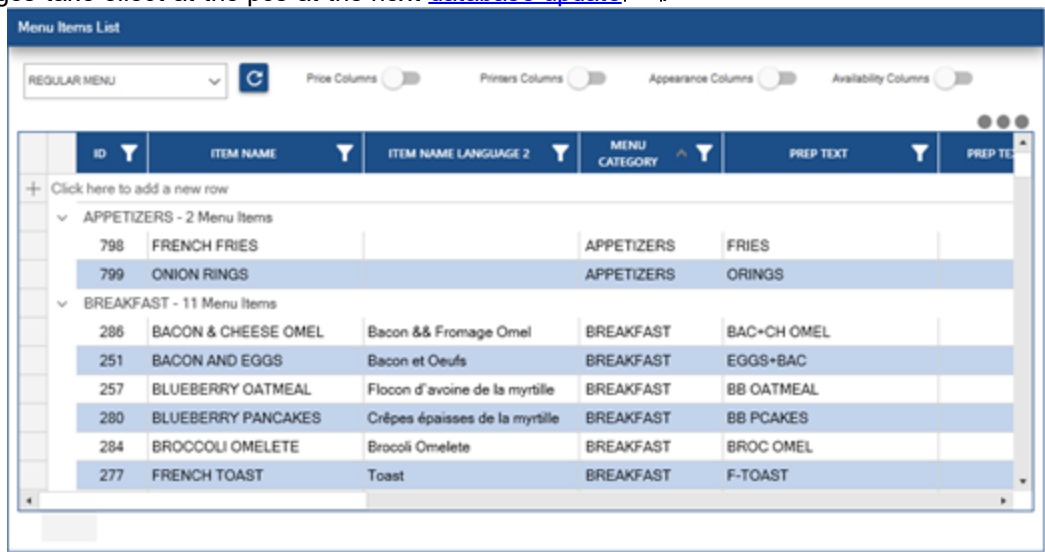
Click the menu item's inventory shortcut to modify the recipe for the menu item. A menu item's recipe consists of all raw ingredients and materials used to prepare the item. Select the inventory item name from the drop-down list, enter the quantity used and click the Add/Edit button to update the database.

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.

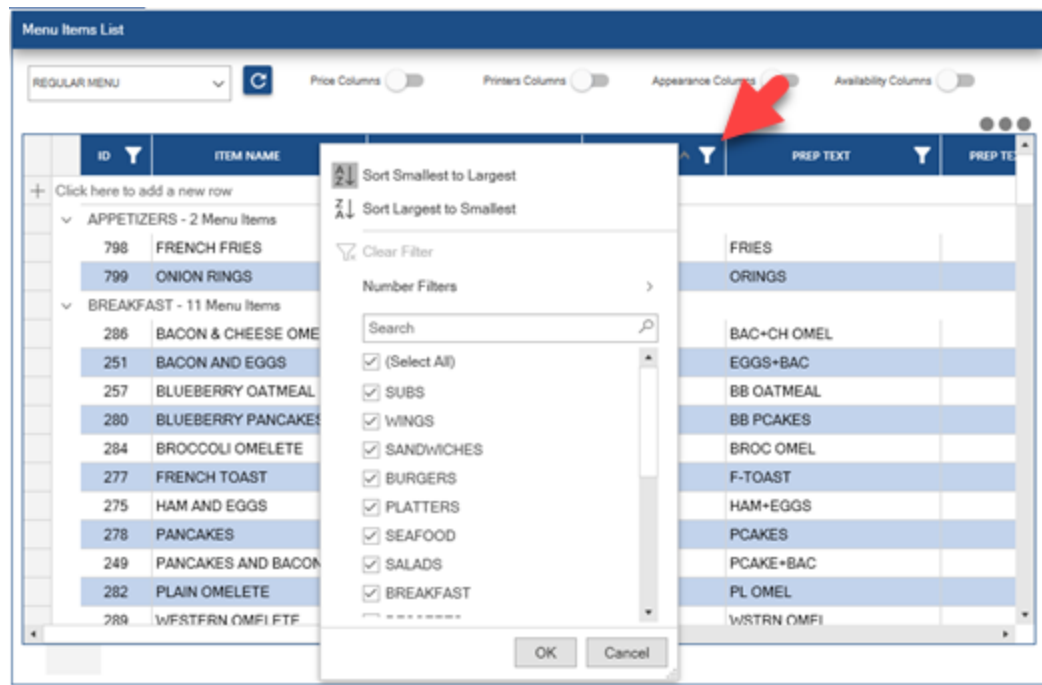


25.3.2 Menu Items List

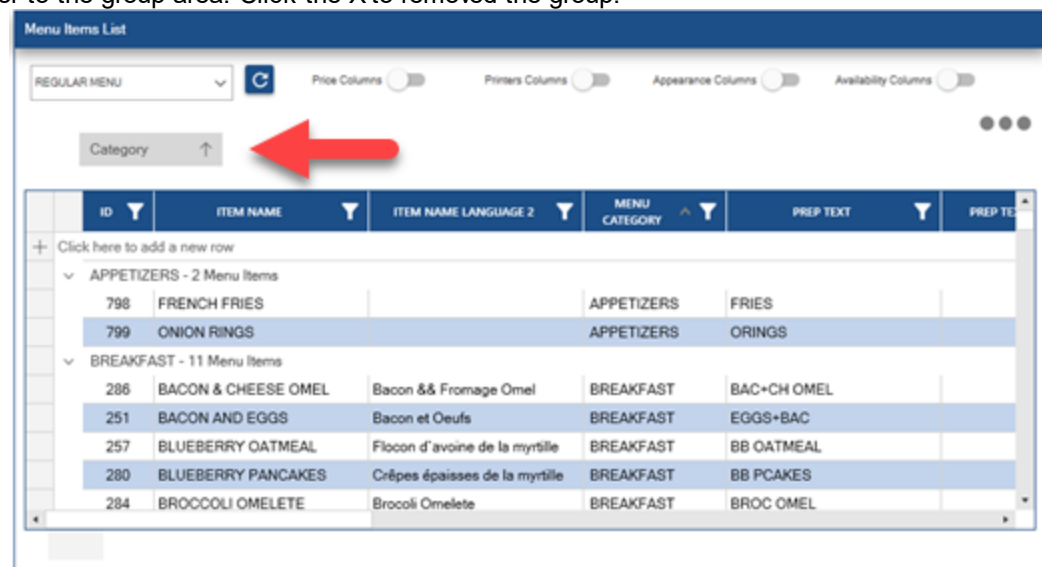
The menu items list displays all regular menu items in an editable data grid for performing quick updates. All changes are saved immediately with a confirmation displayed in the bottom status bar and changes take effect at the pos at the next [database update](#)^[246].



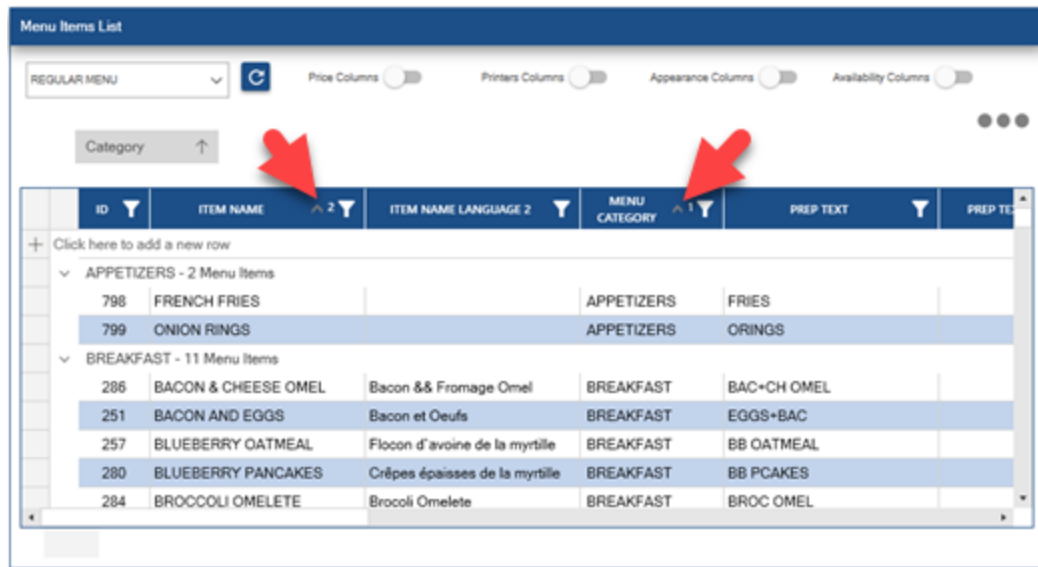
The list can be filtered by clicking the filter icon at the top of any column. In the example below, the checkbox next to any menu category can be cleared to exclude items from the list.



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.



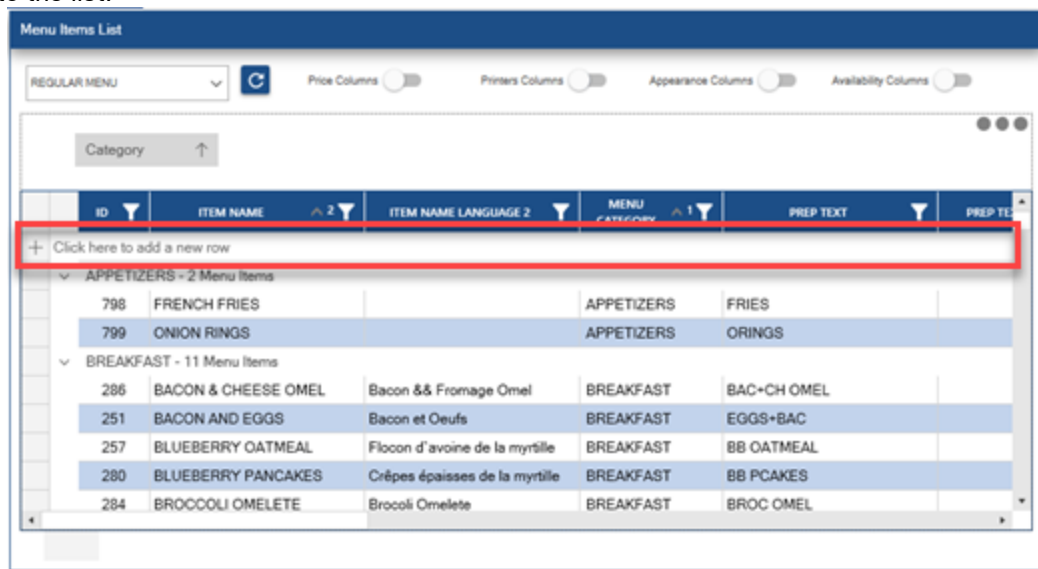
Menu Items List

REGULAR MENU Price Columns ☐ Printers Columns ☐ Appearance Columns ☐ Availability Columns ☐

Category

ID	ITEM NAME	ITEM NAME LANGUAGE 2	MENU CATEGORY	PREP TEXT	PREP TEXT
+ Click here to add a new row					
APPETIZERS - 2 Menu Items					
798	FRENCH FRIES		APPETIZERS	FRIES	
799	ONION RINGS		APPETIZERS	ORINGS	
BREAKFAST - 11 Menu Items					
286	BACON & CHEESE OMEL	Bacon && Fromage Omel	BREAKFAST	BAC+CH OMEL	
251	BACON AND EGGS	Bacon et Oeufs	BREAKFAST	EGGS+BAC	
257	BLUEBERRY OATMEAL	Flocon d'avoine de la myrtille	BREAKFAST	BB OATMEAL	
280	BLUEBERRY PANCAKES	Crêpes épaisses de la myrtille	BREAKFAST	BB PCAKES	
284	BROCCOLI OMELETE	Brocoli Omelete	BREAKFAST	BROC OMEL	

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.



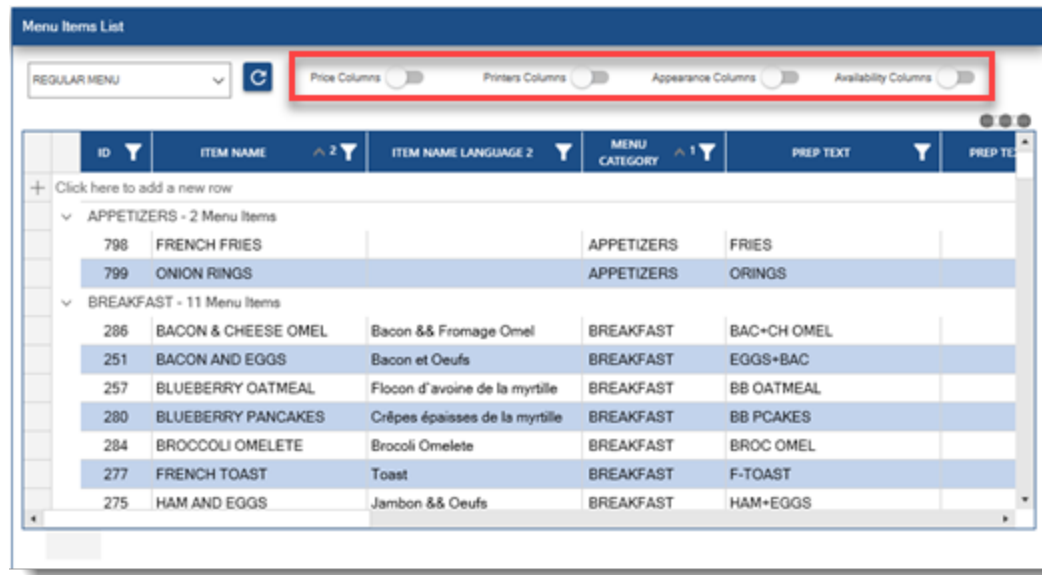
Menu Items List

REGULAR MENU Price Columns ☐ Printers Columns ☐ Appearance Columns ☐ Availability Columns ☐

Category

ID	ITEM NAME	ITEM NAME LANGUAGE 2	MENU CATEGORY	PREP TEXT	PREP TEXT
+ Click here to add a new row					
APPETIZERS - 2 Menu Items					
798	FRENCH FRIES		APPETIZERS	FRIES	
799	ONION RINGS		APPETIZERS	ORINGS	
BREAKFAST - 11 Menu Items					
286	BACON & CHEESE OMEL	Bacon && Fromage Omel	BREAKFAST	BAC+CH OMEL	
251	BACON AND EGGS	Bacon et Oeufs	BREAKFAST	EGGS+BAC	
257	BLUEBERRY OATMEAL	Flocon d'avoine de la myrtille	BREAKFAST	BB OATMEAL	
280	BLUEBERRY PANCAKES	Crêpes épaisses de la myrtille	BREAKFAST	BB PCAKES	
284	BROCCOLI OMELETE	Brocoli Omelete	BREAKFAST	BROC OMEL	

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.



25.3.3 Modifiers

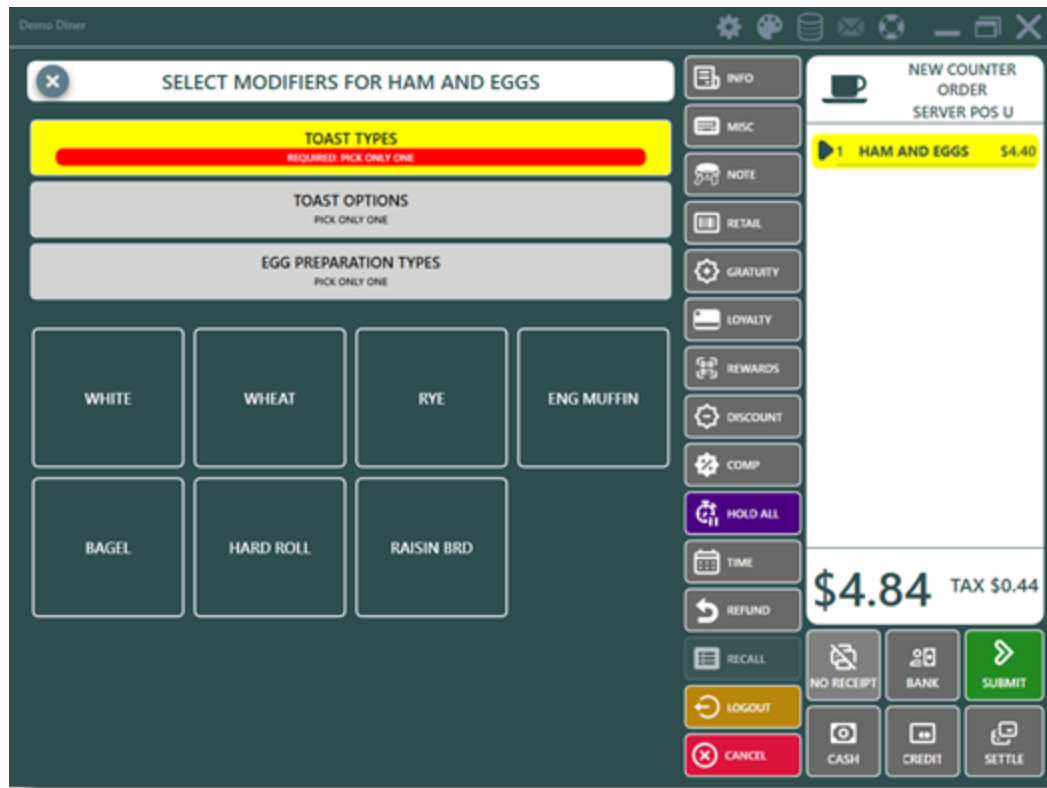
Each regular menu item can have an unlimited number of modifier groups and unlimited modifiers per group. In addition, each group can be defined by 5 price levels that can be used to adjust the modifier item's normal price. Each price level may be used to adjust the price up, down or no change. For example, **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.

- [Modifier Groups](#) ⁵⁶⁷
- [Menu Item Assignments](#) ⁵⁷⁰
- [Modifiers](#) ⁵⁷⁰
- [Modifier Levels](#) ⁵⁷¹
- [Copy Menu Item Assignments](#) ⁵⁷⁴
- [Button Placement and Sizing](#)

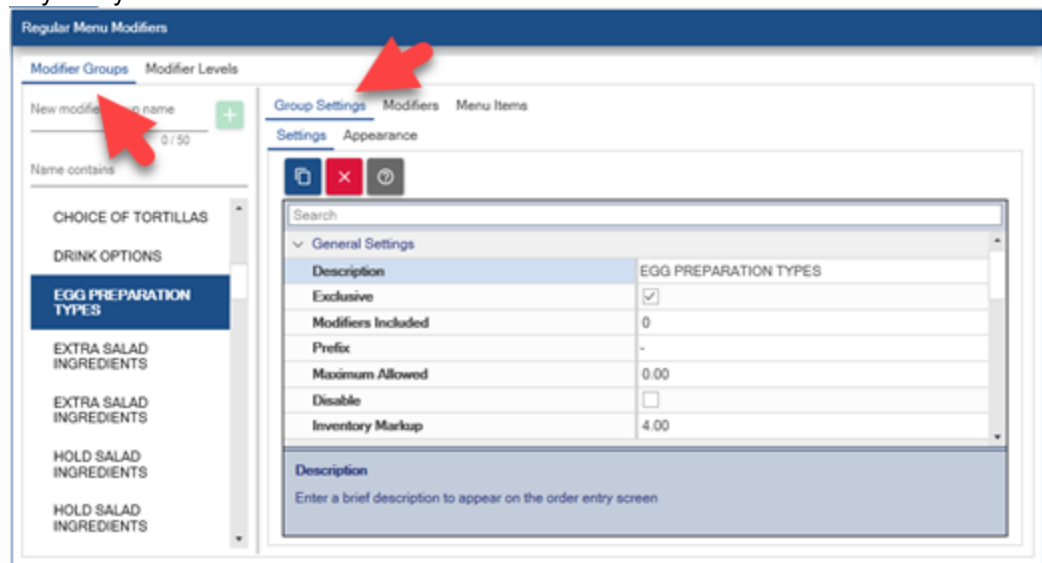
Modifier Groups

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 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.



- 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 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.

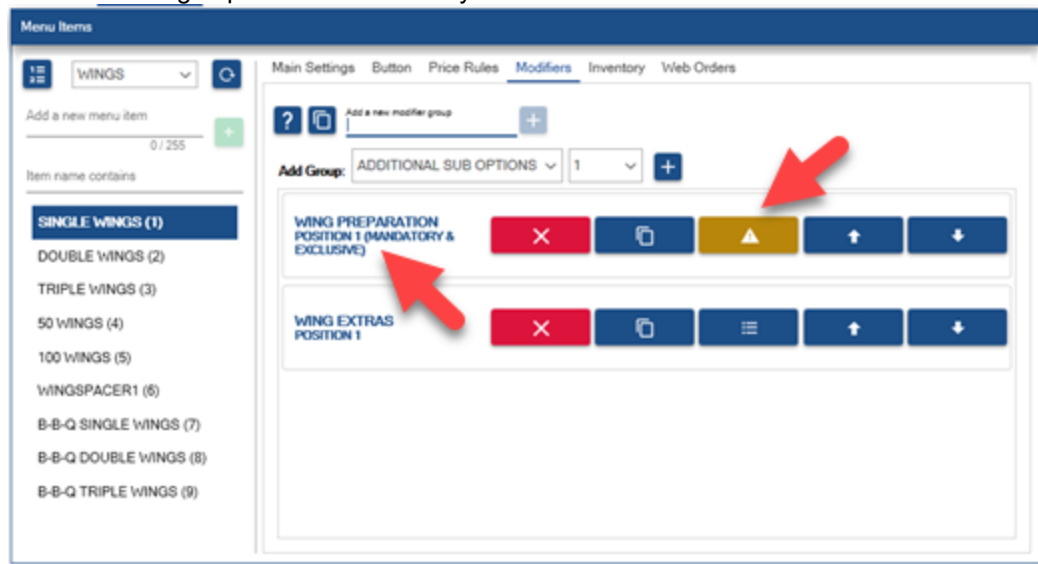
The modifier group default behavior allows the user to select multiple modifiers from each group. In addition, modifier groups can be set to Mandatory, Exclusive, or both Mandatory & Exclusive:

- **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.



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.

Regular Menu Modifiers

Modifier Groups Modifier Levels

New modifier group name +

Name contains 0 / 50

SUB TOPPINGS
REMOVE

TACO EXTRAS

TACO SIDES

TACO TOPPINGS

TOAST OPTIONS

TOAST TYPES

TOPPINGS

WING EXTRAS

WING PREPARATION

XL PIZZA STYLE

XL PIZZA TOPPINGS

Group Settings **Modifiers** Menu Items

New modifier name +

HOT

MEDIUM

MILD

B-B-Q

PLAIN

ATOMIC

Settings Appearance Inventory

Search

General Settings

Description	HOT
Prep Text	HOT
Prep Text (Language 2)	
Visibility	Visible
Button Position	1

Pricing

Regular Price	0.00
---------------	------

Reporting

Id	89
Revenue Center	FOOD
ERP ID	

Description

Enter a brief description that appears on the order entry screen button and customer receipt

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.

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.

Regular Menu Modifiers

Modifier Groups **Modifier Levels**

New modifier level name 0 / 50

2X

3X

BOTTOM

BOTTOM

HOLD

LIGHT

NO

NO

Settings Appearance

Search

General Settings

Button Text	2X
Prep Text	2X
Quantity Adjustment	2.00

Reporting

Id	10
----	----

Button Text

Enter a brief description to appear on the order entry screen button and customer receipts

- 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 Adjustment: Enter the quantity adjustment. For example, if the modifier level is half, 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.

Regular Menu Modifiers

Modifier Groups Modifier Levels

New modifier group name 0 / 50

Name contains

BURGER TOPPINGS

CHOICE OF TORTILLAS

DRINK OPTIONS

EGG PREPARATION TYPES

EXTRA SALAD INGREDIENTS

EXTRA SALAD INGREDIENTS

HOLD SALAD INGREDIENTS

Group Settings Modifiers Menu Items

Settings Appearance

Search

▼ **Modifier Levels**

Modifier Level 1	NO	▼
Modifier Level 2	HOLD	▼
Modifier Level 3	ON SIDE	▼
Modifier Level 4	XTRA	▼

▼ **Web** Select the modifier level button to appear in position 4

Description

Enter a brief description to appear on the order entry screen

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.

Regular Menu Modifiers

Modifier Groups Modifier Levels

New modifier group name 0 / 50

Name contains

ICE CREAM FLAVOR

JUICE FLAVOR

LARGE PIZZA TOPPINGS

LG PIZZA STYLE

MEDIUM PIZZA STYLE

MEDIUM PIZZA TOPPINGS

OMELETE CHEESE

OMELETE EXTRAS

GREEN PEPPER

RED PEPPER

SAUSAGE

BACON

ANCHOVIES

ONIONS

MUSHROOMS

CHILI PEPPERS

PEPPERONI

Group Settings Modifiers Menu Items

New modifier name 0 / 50

Settings Appearance Inventory

Search

> **General Settings**

▼ **Pricing**

Regular Price	2.00
NO Modifier Level Price	1.00
HOLD Modifier Level Price	1.00
ON SIDE Modifier Level Price	4.00
XTRA Modifier Level Price	6.00
LIGHT Modifier Level Price	0.00

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, select the same modifier to remove it from the order.

SELECT MODIFIERS FOR BACON BURGER

BURGER TOPPINGS
PICK ONLY ONE

BURGER TOPPINGS

REMOVE BURGER TOPPINGS

BURGER ADD-ONS

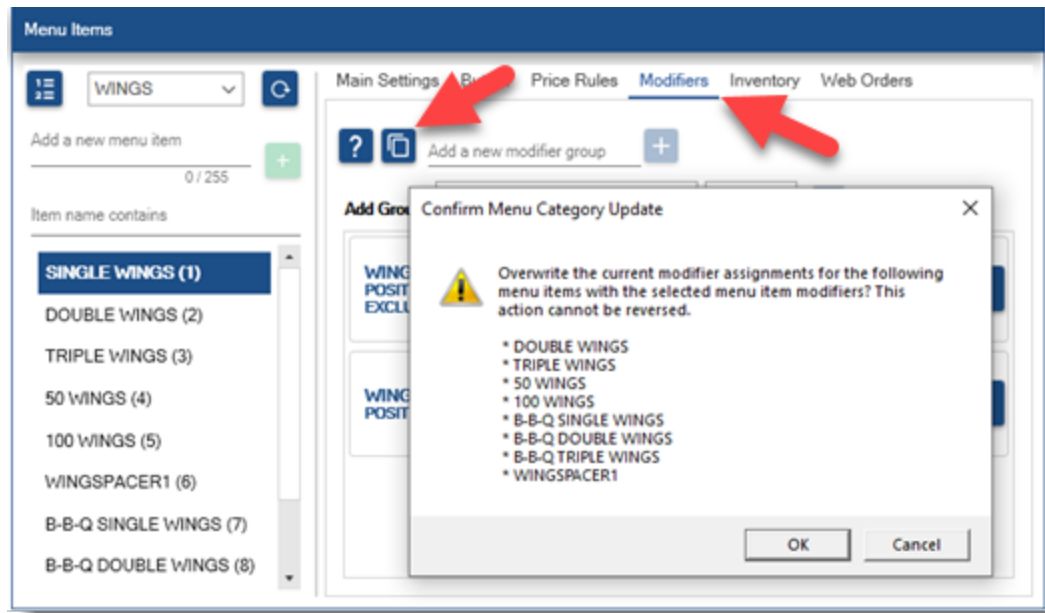
NO HOLD ON SIDE XTRA LIGHT

ONIONS MUSHROOM B-B-Q SAUCE CATSUP

MUSTARD PICKLES

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.



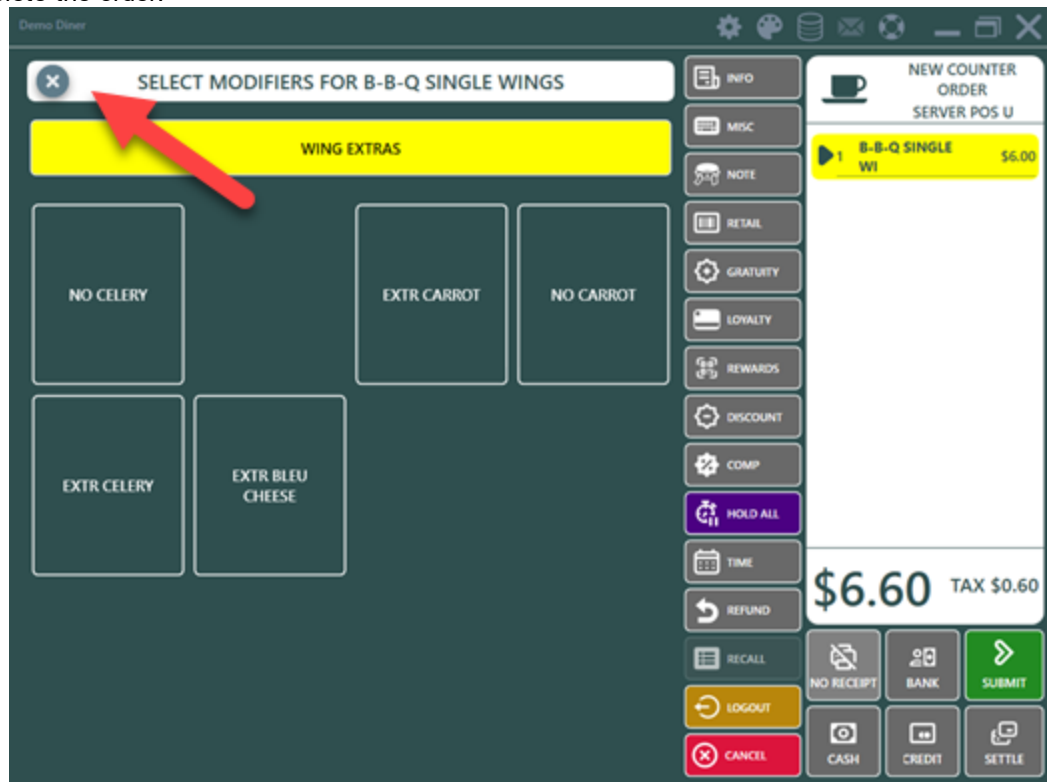
25.3.4 Order Entry

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.

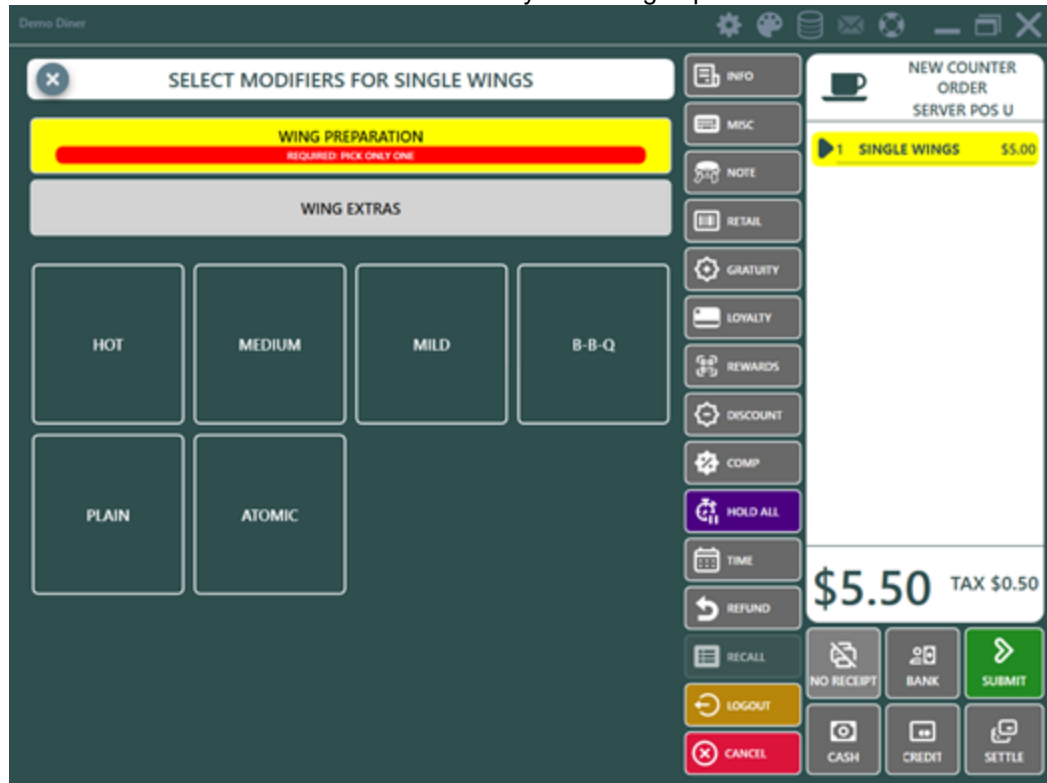
After selecting a menu category, the current menu items list is cleared and reloaded. In the example below, the **WINGS** category contains 8 visible menu items and 1 spacer (used to separate the regular wings from the BBQ wings).



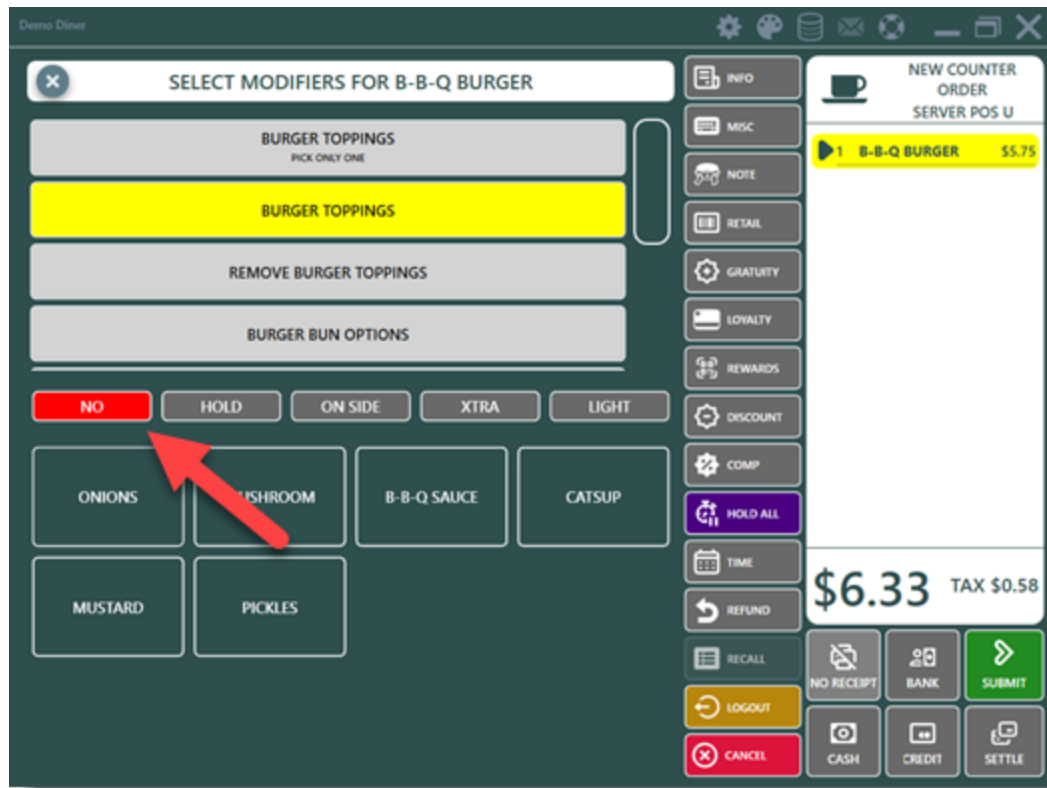
In the example below, **B-B-Q Single Wings** was selected. Available modifier groups are shown. If no modifiers are required, press the **BACK TO MENU** button to continue the order, or the **SUBMIT** button to complete the order.



In the example below, **Single Wings** was selected. Note that the user cannot exit the modifier screen or submit the order until a modifier from the mandatory modifier group is selected.



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.



25.3.5 Pizza Menu

AmigoPOS can accommodate most pizza menus by adjusting the [modifier group settings](#)⁵⁶⁷. The scenarios below are used to illustrate the most common scenarios. Refer to the demo database for additional examples.

Example 1: **2 Large Any Style Pizzas w/ 1 topping included + 20 Wings + 2 Liter Soda \$47.50 Available Fridays Only**

The steps required are:

1. Open the menu items editor and select the **PIZZA** menu category. Create a new [menu item](#)⁵⁵⁷ named **Super Saver 2**.

Menu Items

PIZZA

Add a new menu item

Super Saver 2

Item name contains

- SMALL CH & PEP (1)
- SM PIZZA (2)
- MED PIZZA (2)
- LG PIZZA (3)
- 2 SM CH PIZZA 1 TOPPING (3)
- XL PIZZA (4)

Main Settings Button Special Pricing Modifiers Inventory

General Settings

Item Name	SMALL CH & PEP
Menu Category	PIZZA
Add to Retail Favorites	<input type="checkbox"/>
Prep Text	SM CHEESE PEPPERONI
Visibility	Visible
Button Position	1
Availability	In-Store & Web
Modifier Groups Visible Rows	1

Pricing

Price	8,5
-------	-----

2. Set the price to \$47.50 and verify that the correct tax rate is selected.

Menu Items

PIZZA

Add a new menu item

Item name contains

- SMALL CH & PEP (1)
- SM PIZZA (2)
- MED PIZZA (2)
- LG PIZZA (3)
- 2 SM CH PIZZA 1 TOPPING (3)
- XL PIZZA (4)
- Super Saver 2 (5)

Main Settings Button Special Pricing Modifiers Inventory

Menu Category

Menu Category	PIZZA
Add to Retail Favorites	<input type="checkbox"/>
Prep Text	Super Saver 2
Visibility	Visible
Button Position	5
Availability	In-Store & Web
Modifier Groups Visible Rows	3

Pricing

Price	47,5
Tax Rate	9% [ID:1/SALES TAX]
Container Charge	0

Price

Enter the regular price. Vat tax users should include tax in the price.

3. In the menu item editor, click the Modifiers tab and add a new [modifier group](#)^[567] named **Pizza Styles 1**.

Menu Items

PIZZA

Main Settings Button Special Pricing **Modifiers** Inventory

Add a new menu item

Item name contains

- SMALL CH & PEP (1)
- SM PIZZA (2)
- MED PIZZA (2)
- LG PIZZA (3)
- 2 SM CH PIZZA 1 TOPPING (3)
- XL PIZZA (4)
- Super Saver 2 (5)

Add a new modifier group

Pizza Style 1

Add Group: ADD ICE CREAM TO PIE 1

4. Change the modifier group prefix to P1. The prefix is printed before the pizza style on the prep ticket, remote display and customer receipt. Change the value of Maximum allowed to 1 so that more than 1 total pizza style cannot be selected on the order entry screen. Note that 1 total pizza style may consist of 2 half styles, as described below.

Modifier Groups Modifier Levels

New modifier group name

Name contains

- PIE ICE CREAM ADD-ONS
- PIE OPTIONS
- PIZZA 1 TOPPINGS (1ST TOPPING FREE)
- PIZZA 2 TOPPINGS (1ST TOPPING FREE)
- PIZZA INGREDIENTS
- Pizza Style 1**
- PIZZA STYLES

Group Settings Modifiers Menu Items

Settings Appearance

General Settings

Description	Pizza Style 1
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	1
Modifier Button Rows	1

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

5. Create 2 new modifiers levels, **TOP ½** and **BOT ½**. Set the **Quantity Multiplier** setting for both modifier levels to **0.5**. The quantity multiplier prevents servers from entering more than 1 total style.

Modifier Groups **Modifier Levels**

New modifier level name + Settings Appearance

HOLD

LIGHT

NO

NO

ON SIDE

TOP

TOP

TOP ½

XTRA

General Settings

Button Text	TOP ½
Prep Text	
Quantity Multiplier	0.5

Quantity Multiplier
Enter the quantity adjustment. For example, If the modifier level is ½, Enter .5 so that the modifier is properly counted. This value is also used for inventory adjustment.

6. Assign both new modifier levels to the **Pizza Styles 1** modifier group. In some cases the modifier editor window must be closed and reopened for the new modifier levels to appear.

Modifier Groups Modifier Levels

New modifier group name +

Name contains

PIE ICE CREAM ADD-ONS

PIE OPTIONS

PIZZA 1 TOPPINGS (1ST TOPPING FREE)

PIZZA 2 TOPPINGS (1ST TOPPING FREE)

PIZZA INGREDIENTS

Pizza Style 1

PIZZA STYLES

Group Settings Modifiers Menu Items

Settings Appearance

General Settings

Modifier Levels

Modifier Level1	TOP ½
Modifier Level2	BOT ½
Modifier Level3	None
Modifier Level4	None
Modifier Level5	None

Web Orders

Modifier Type	
---------------	--

Modifier Level1
Select the modifier level button to appear in position 1

7. 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 ½ price to \$2.50 and the BOT ½ price to \$2.50.

Modifier Groups Modifier Levels

New modifier group name +

Name contains

- PIZZA 2 TOPPINGS (1ST TOPPING FREE)
- PIZZA INGREDIENTS
- Pizza Style 1**
- PIZZA STYLES
- REMOVE BURGER TOPPINGS
- REMOVE SEAFOOD EXTRAS
- REMOVE WRAP TOPPINGS

Group Settings **Modifiers** Menu Items

New modifier name +

California

Settings Appearance Inventory

General Settings

Button Text	California
Button Position	1
Prep Text	California
Visibility	Visible

Pricing

Regular Price	5
TOP ½ Price	2.5
BOT ½ Price	2.5
Revenue Center	NONE

Regular Price

8. After all pizza styles have been entered in the Pizza Styles 1 modifier group, click copy at the top to create a duplicate.

Modifier Groups Modifier Levels

New modifier group name +

Name contains

- PIZZA INGREDIENTS
- Pizza Style 1**
- PIZZA STYLES
- REMOVE BURGER TOPPINGS
- REMOVE SEAFOOD EXTRAS
- REMOVE WRAP TOPPINGS
- SALAD DRESSING

Group Settings **Modifiers** Menu Items

New modifier name +

California

White

BBQ

Gluten Free

Hawaiian

Sicilian

Settings Appearance Inventory

General Settings

Button Text	California
Button Position	1
Prep Text	California
Visibility	Visible

Pricing

Regular Price	5
TOP ½ Price	2.5

9. Change the name of the new group to **Pizza Style 2** and change the Modifier Prefix to **P2**.

The screenshot shows the 'Modifier Groups' interface. On the left, a list of modifier groups includes 'LG PIZZA STYLE', 'LG PIZZA TOPPINGS', 'MED PIZZA STYLE', 'MED PIZZA TOPPINGS', 'New Modifier Group', 'OMELETE CHEESE', 'OMELETE EXTRAS', 'OMELETE PREPARATION', and 'PANCAKE OPTIONS'. The 'New Modifier Group' button is highlighted. On the right, the 'Group Settings' tab is active, showing the 'Settings' sub-tab. The 'General Settings' section is expanded, displaying the following settings for 'Pizza Style 2':

Setting	Value
Description	Pizza Style 2
Exclusive	<input type="checkbox"/>
Modifiers Included	0
Prefix	P2
Maximum Allowed	1
Prevent Duplicate Modifier Levels	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Inventory Markup	1
Modifier Button Rows	1

Below the settings, a 'Prefix' section explains: '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'.

10. Open the menu item editor and assign the **Pizza Style 2** modifier group to the Super Saver 2 menu item.

The screenshot shows the 'Menu Items' interface. On the left, a list of menu items includes 'SMALL CH & PEP (1)', 'SM PIZZA (2)', 'MED PIZZA (2)', 'LG PIZZA (3)', '2 SM CH PIZZA 1 TOPPING (3)', 'XL PIZZA (4)', and 'Super Saver 2 (5)'. The 'Super Saver 2 (5)' item is highlighted. On the right, the 'Modifiers' tab is active, showing a list of modifier groups. The 'Pizza Style 2' group is highlighted in the list. The 'Add Group' button is visible, and a dropdown menu is open, showing the 'Pizza Style 2' group selected.

11. In the modifiers editor, create a new modifier group named **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 ½ for Modifier Level 1 and BOT ½ for Modifier Level 2.

Modifiers x

Modifier Groups | Modifier Levels

New modifier group name +

Name contains

- MED PIZZA TOPPINGS
- OMELETE CHEESE
- OMELETE EXTRAS
- OMELETE PREPARATION
- PANCAKE OPTIONS
- PIE ICE CREAM ADD-ONS
- PIE OPTIONS
- Pizza 1 Toppings
- PIZZA 1 TOPPINGS (1ST TOPPING FREE)
- PIZZA 2 TOPPINGS (1ST TOPPING FREE)
- PIZZA INGREDIENTS

Group Settings | Modifiers | Menu Items

Settings | Appearance

General Settings

Description	Pizza 1 Toppings
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
Modifier Button Rows	1
Buttons Per Row	5

Modifier Levels

Modifier Level1	TOP ½
Modifier Level2	BOT ½
Modifier Level3	None
Modifier Level4	None
Modifier Level5	None

Modifier Level1

Select the modifier level button to appear in position 1

12. 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.

Modifier Groups | Modifier Levels

New modifier group name +

Name contains

- OMELETE PREPARATION
- PANCAKE OPTIONS
- PIE ICE CREAM ADD-ONS
- PIE OPTIONS
- Pizza 1 Toppings
- PIZZA 1 TOPPINGS (1ST TOPPING FREE)
- PIZZA 2 TOPPINGS (1ST TOPPING FREE)
- PIZZA INGREDIENTS
- Pizza Style 1

Group Settings | **Modifiers** | Menu Items

New modifier name +

Anchovies +

Settings | Appearance | Inventory

General Settings

Button Text	Pineapple
Button Position	1
Prep Text	Pineapple
Visibility	Visible

Pricing

Regular Price	2
TOP ½ Price	1
BOT ½ Price	1
Revenue Center	NONE

Regular Price

13. After all pizza toppings have been entered in the Pizza Toppings 1 modifier group, click copy to create a duplicate of the **Pizza Toppings 1** modifier group. Change the name of the new group to **Pizza Toppings 2** and change the Modifier Prefix to P2.

Modifier Groups Modifier Levels

New modifier group name

Name contains

New Modifier Group

OMELETE CHEESE

OMELETE EXTRAS

OMELETE PREPARATION

PANCAKE OPTIONS

PIE ICE CREAM ADD-ONS

PIE OPTIONS

Pizza 1 Toppings

PIZZA 1 TOPPINGS (1ST TOPPING FREE)

Group Settings Modifiers Menu Items

Settings Appearance

General Settings

Description	Pizza 2 Toppings
Exclusive	<input type="checkbox"/>
Modifiers Included	1
Prefix	P2
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 Levels

Modifier Level 1 TOP 14

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

14. Open the menu item editor and select the Super Saver 2 menu item. Select the Modifiers tab and assign both the **Pizza 1 Toppings** and **Pizza 2 Toppings** modifier groups to the menu item.

PIZZA Main Settings Button Special Pricing **Modifiers** Inventory Online

Add a new menu item

Add a new modifier group

Item name contains

SMALL CH & PEP (1)

SM PIZZA (2)

MED PIZZA (2)

LG PIZZA (3)

2 SM CH PIZZA 1 TOPPING (3)

XL PIZZA (4)

Super Saver 2 (5)

Add Group: Pizza 2 Toppings 1

Pizza Style 1
POSITION 1

Pizza Style 2
POSITION 2

Pizza 1 Toppings
POSITION 3

Pizza 2 Toppings
POSITION 4

15. 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.

The screenshot displays the 'Modifiers' tab in the AmigoPOS 9 menu setup interface. The top navigation bar includes 'Main Settings', 'Button', 'Special Pricing', 'Modifiers' (selected), 'Inventory', and 'Online'. Below the navigation bar, there are two main sections: 'Add a new menu item' and 'Add a new modifier group'. The 'Add a new modifier group' section is highlighted in yellow and shows a dropdown menu with 'WING PREPARATION' selected, followed by a '1' and a plus icon. Below this, there is a list of modifier groups with their positions and status. The groups are: 'WING PREPARATION' (POSITION 4 (MANDATORY & EXCLUSI...), 'Pizza Style 1' (POSITION 1), 'Pizza Style 2' (POSITION 2), 'Pizza 1 Toppings' (POSITION 3), and 'Pizza 2 Toppings' (POSITION 4). Each group has a set of icons: a blue circle with three dots, a red circle with an 'X', a blue circle with a document icon, a blue circle with a list icon, and two blue circles with up and down arrows. The 'WING PREPARATION' group is highlighted in yellow.

16. 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.

PIZZA

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

Add a new menu item

Add a new modifier group

Item name contains

SMALL CH & PEP (1)

SM PIZZA (2)

MED PIZZA (2)

LG PIZZA (3)

2 SM CH PIZZA 1 TOPPING (3)

XL PIZZA (4)

Super Saver 2 (5)

Add Group: Soda Flavor 1

WING PREPARATION
POSITION 4 (MANDATORY & EXCLUSI

Soda Flavor
POSITION 4 (MANDATORY)

Pizza Style 1
POSITION 1

Pizza Style 2
POSITION 2

Pizza 1 Toppings
POSITION 3

Pizza 2 Toppings
POSITION 4

17. 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.

PIZZA

Main Settings Button Special Pricing Modifiers Inventory Online

Add a new menu item

Item name contains

SMALL CH & PEP (1)

SM PIZZA (2)

MED PIZZA (2)

LG PIZZA (3)

2 SM CH PIZZA 1 TOPPING (3)

XL PIZZA (4)

Super Saver 2 (5)

General Settings

Pricing

Prep Printers

Label Printers

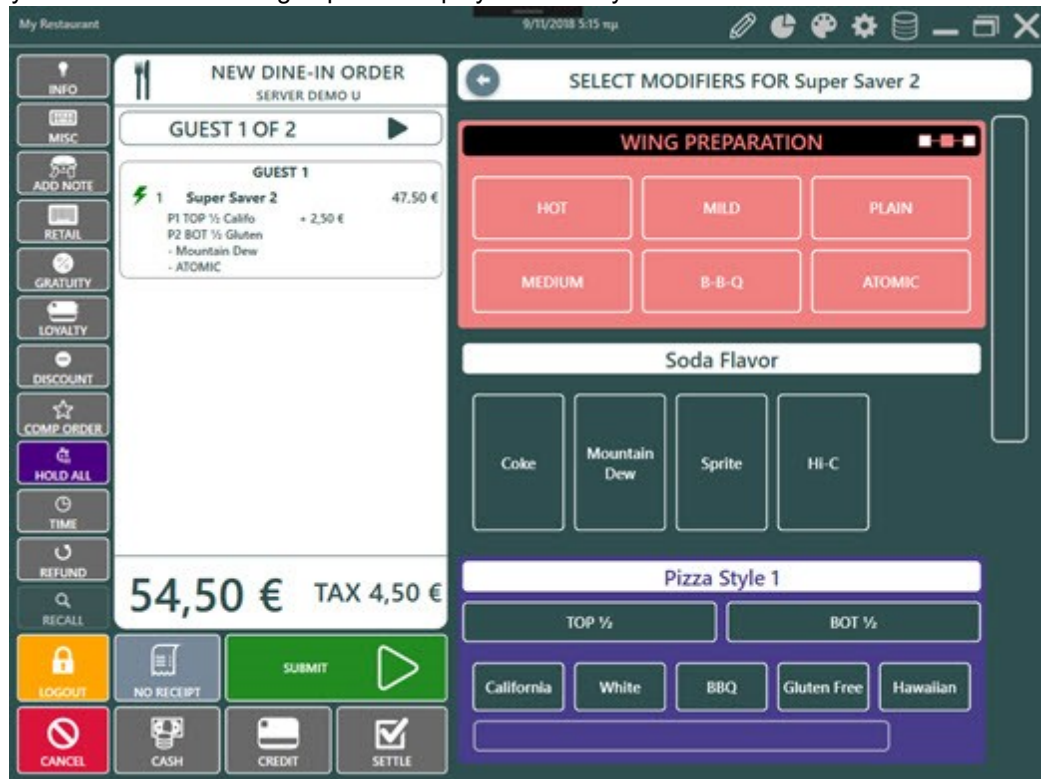
Day/Time Availability

Time On	00:00
Time Off	00:00
Restrict Days	<input checked="" type="checkbox"/>
Δευτέρα	<input type="checkbox"/>
Τρίτη	<input type="checkbox"/>
Τετάρτη	<input type="checkbox"/>
Πέμπτη	<input type="checkbox"/>
Παρασκευή	<input checked="" type="checkbox"/>
Σάββατο	<input type="checkbox"/>
Κυριακή	<input type="checkbox"/>

Παρασκευή

Enable this item on Παρασκευή

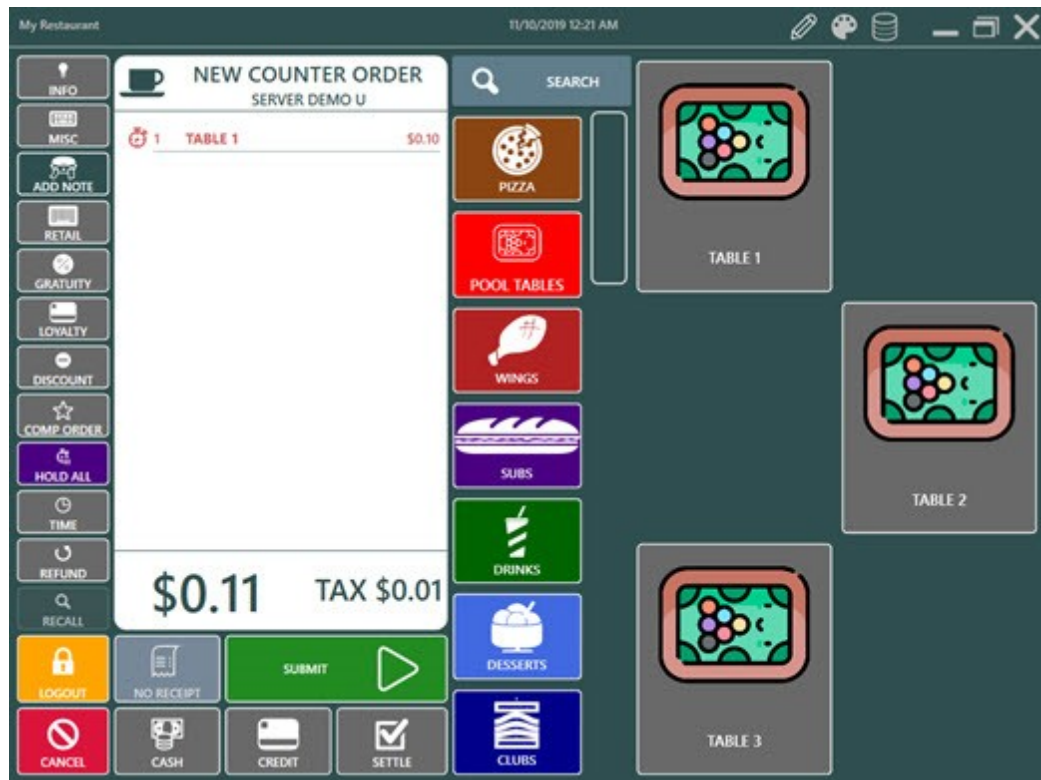
18. Open the order entry screen and verify that the Super Saver 2 menu item is listed in the PIZZA menu category and that the modifier groups are displayed correctly.



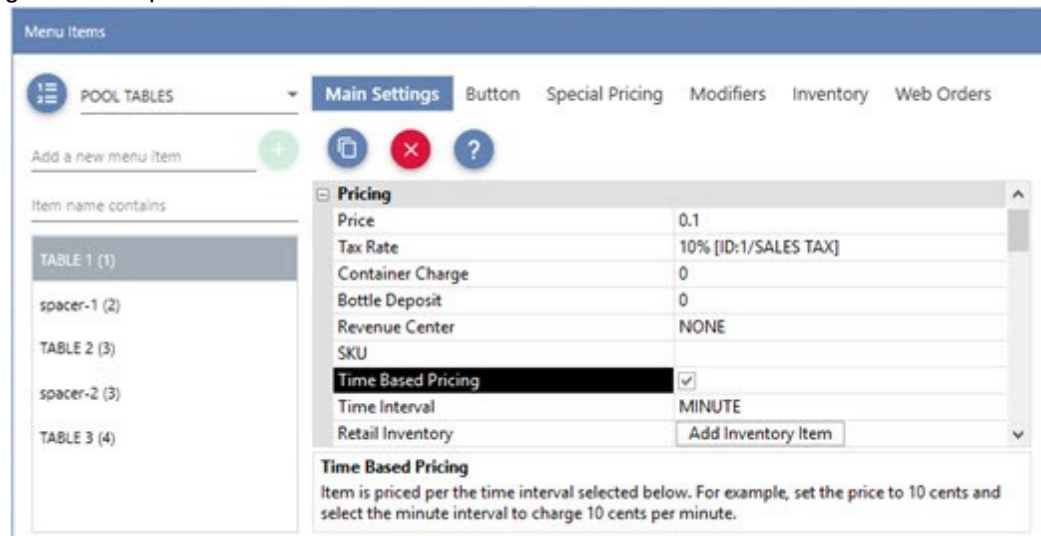
25.3.6 Time Based Items

Regular menu items can be set to use a timer and charge the price for each minute or hour. Typical uses include pool halls where the charge for a pool table is per minute.

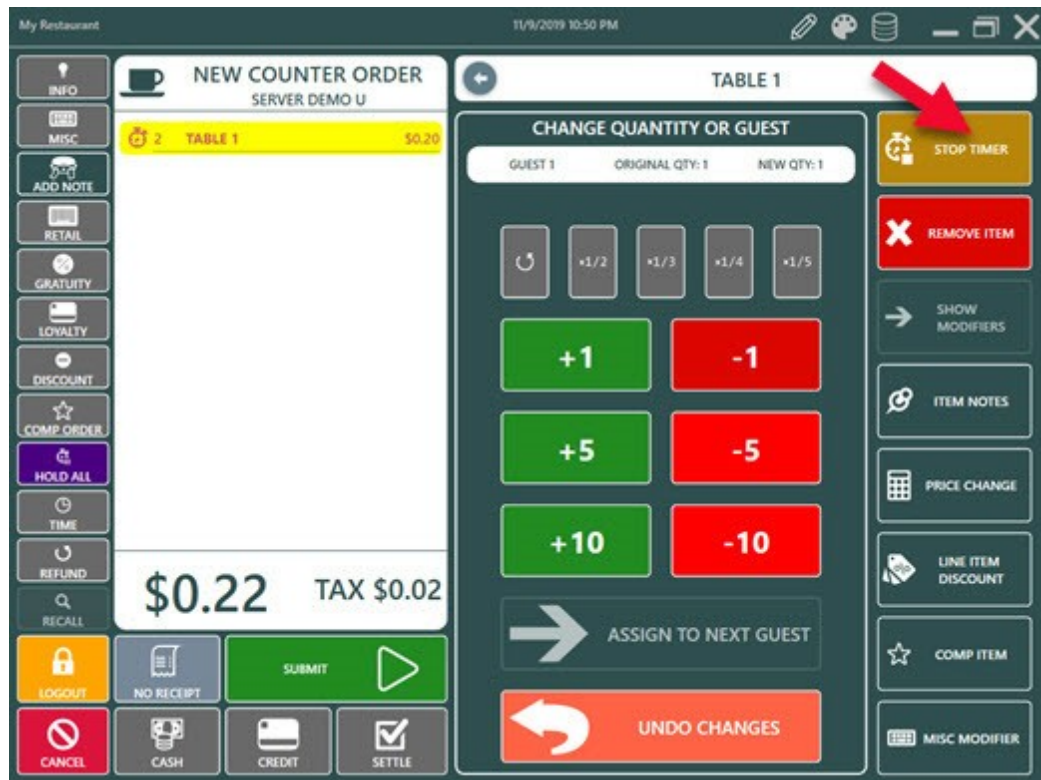
- The total time is always rounded up. For example, 1.5 minutes is rounded up to 2 minutes and 1.5 hours is rounded up to 2 hours.
- Orders that contain active timers cannot be settled until the timers are stopped
- The start time can be manually adjusted if necessary



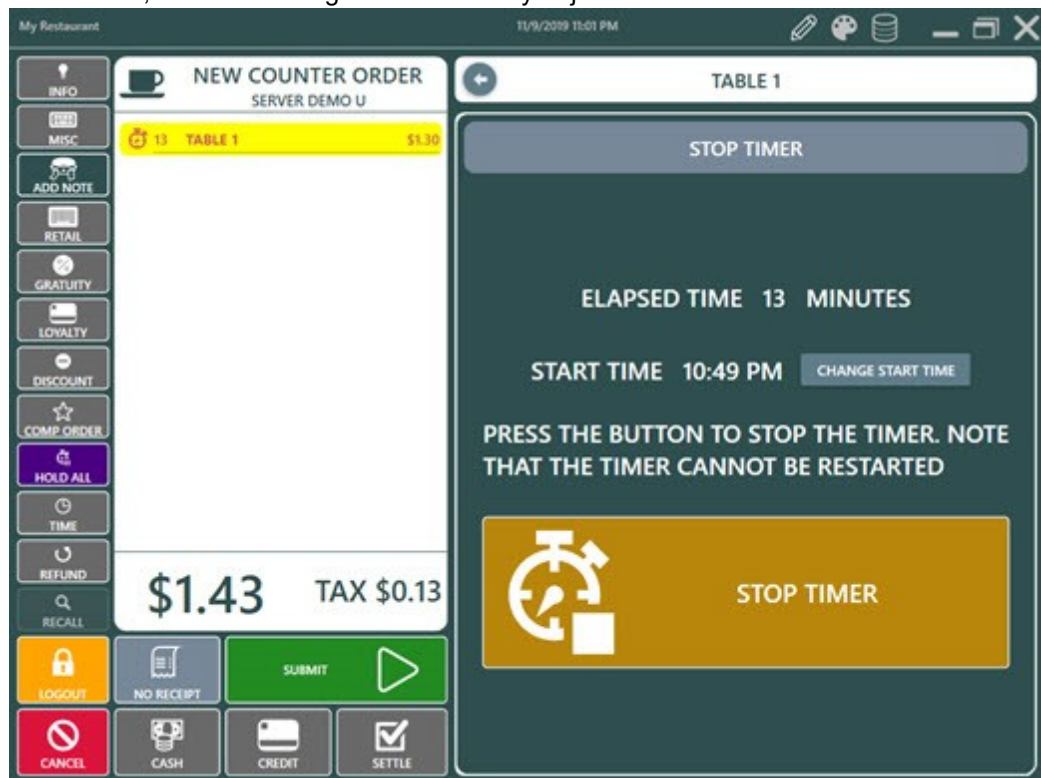
Open the menu item editor and add a regular menu item. Set the price, check the box next to Time Based Pricing and select either hour or minute Time Interval. In the example below the item price is set to charge 10 cents per minute.



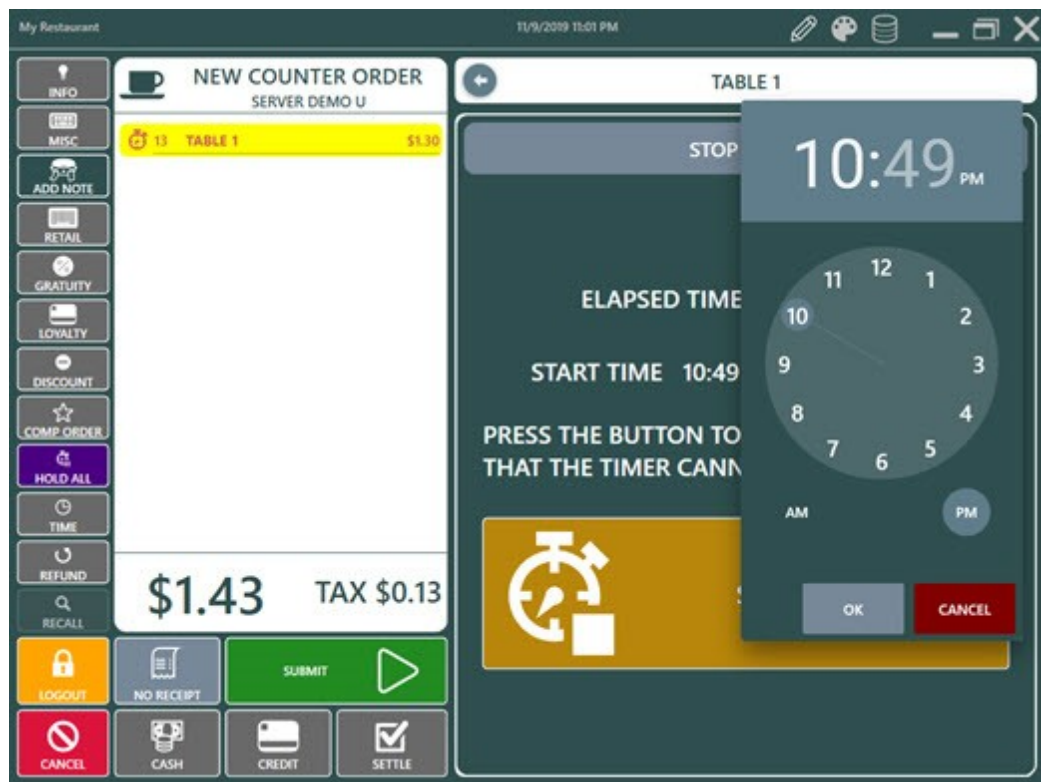
Start a new order and add the menu item. The small light red icon indicates that the timer is running and the price will update in real time. The timer can be stopped by selecting the item on the guest check and pressing the STOP TIMER button.



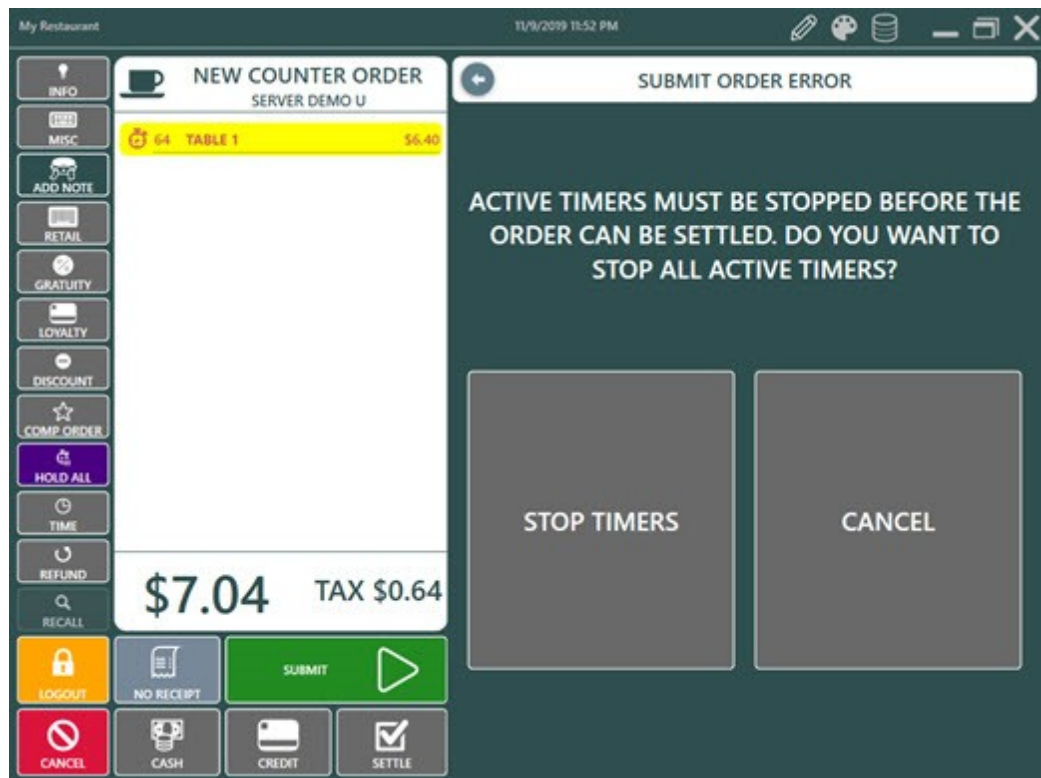
The timer cannot be restarted after it is stopped. If the timer is mistakenly stopped too soon, remove the item from the order, add the item again and manually adjust the time as described below.



The start time can be manually adjusted by selecting the item on the guest check and pressing the CHANGE START TIME button.



The order cannot be settled before the timer is stopped. As prompt is displayed when attempting to settle an order with active timers.



Orders with active timers do not display the settlement buttons on the recall list.



The customer receipt displays the minutes and cost per minute next to the item name.

```
=====
CUSTOMER COPY                                COUNTER
SERVER: DEMO U
=====
TABLE 1 (74 minutes @0.10)                    7.40
                                           SUBTOTAL:    $7.40
                                           SALES TAX:    $0.74
=====
PAY THIS AMOUNT:  $8.14
```

25.3.7 Menu Item Counters

Menu item counters are used to set the available quantity for selected menu items in order to prevent users from selecting order items that are no longer available.

Menu item counters are disabled by default and can be enabled in back office | settings | main settings | order entry | regular menu | menu item counters enabled. Note that enabling menu item counters will cause a slight delay on the order entry screen when running on slower processors such as the Intel Celeron or single core Atom processor.

Order Entry Screen Settings X

Order Entry Screen Retail Removed Items Void Reasons Refund Reasons Age Verification Word Filters

Discounts

Regular Menu

Display Modifiers Only If Mandatory	No
Menu Item Counters	Yes
Menu Item Counters Delete At End Of Day	Yes
Menu Item Counters Enabled	Yes
Order menu items Alphabetically	No
Order Modifiers Alphabetically	No
Send Misc Items To Prep 1	Yes
Mandatory Beverage Category	DRINKS

Bar Tabs

Loyalty Cards

Order Entry Buttons

Bar Menu Settings

Menu Item Counters Enabled

Enable menu item counters to automatically disable zero quantity menu item buttons.

Menu item counters are configured on the manager screen | system | menu item counters.

My Restaurant 12/30/2020 1:30 PM

CASH DRAWERS

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

C:\ PROMPT

Notepad++

On-Screen Keyboard

SHUT DOWN

FINISHED

MENU ITEM COUNTERS

MENU ITEM COUNTERS

EVENT PRICING

LICENSE

STATION ID

THEME

WINDOWS STARTUP

CASH DRAWERS

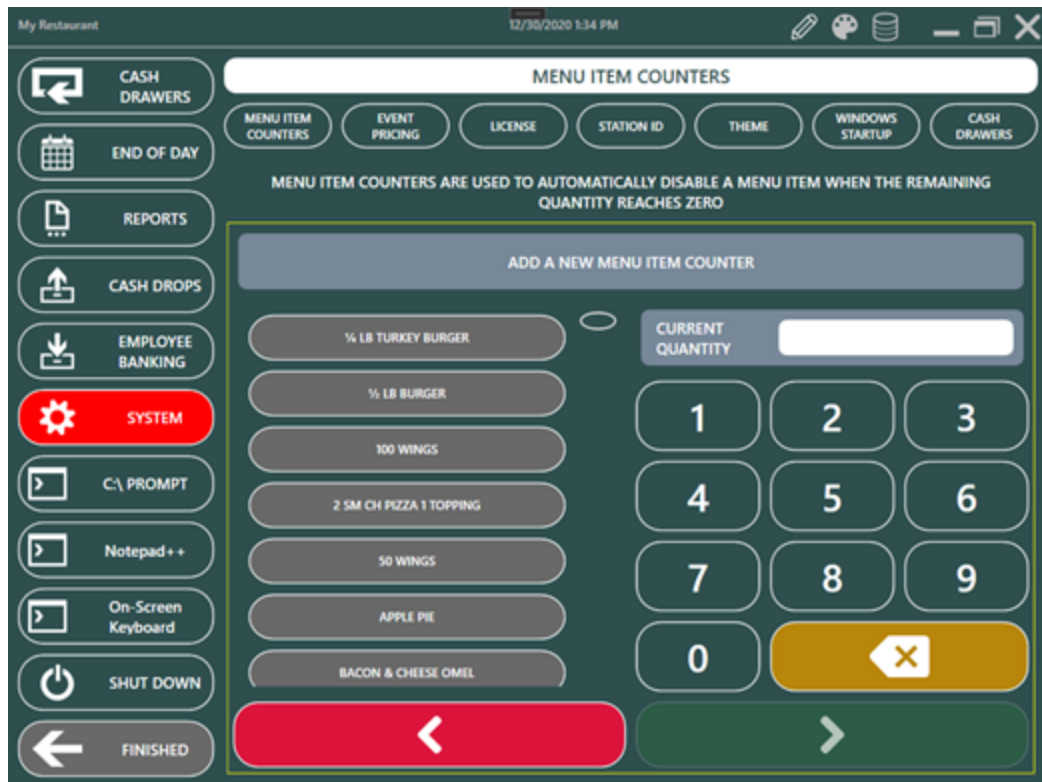
MENU ITEM COUNTERS ARE USED TO AUTOMATICALLY DISABLE A MENU ITEM WHEN THE REMAINING QUANTITY REACHES ZERO

ADD NEW

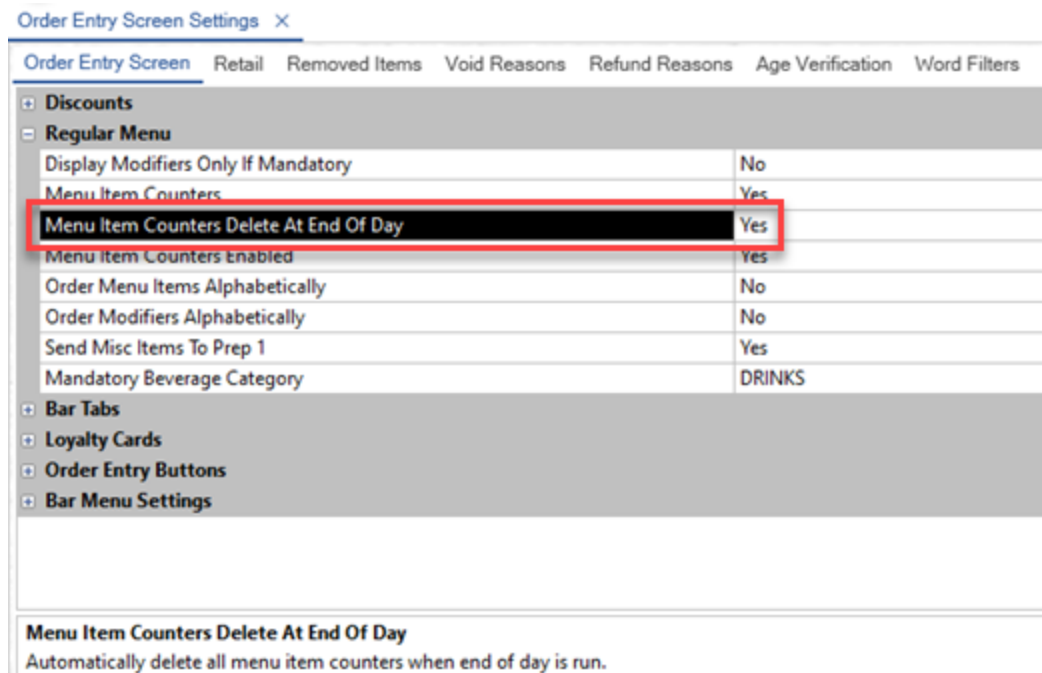
CLEAR ALL

MEATBALL SUB	0 REMAINING	X
B-B-Q BURGER	9 REMAINING	X

Click Add New to define a new menu item counter. Select the menu item, enter the starting quantity and click the right arrow to save.



Menu item counters are automatically deleted when the end of day is run. This action can be disabled in back office | settings | main settings | order entry | regular menu | menu item counters delete at end of day.



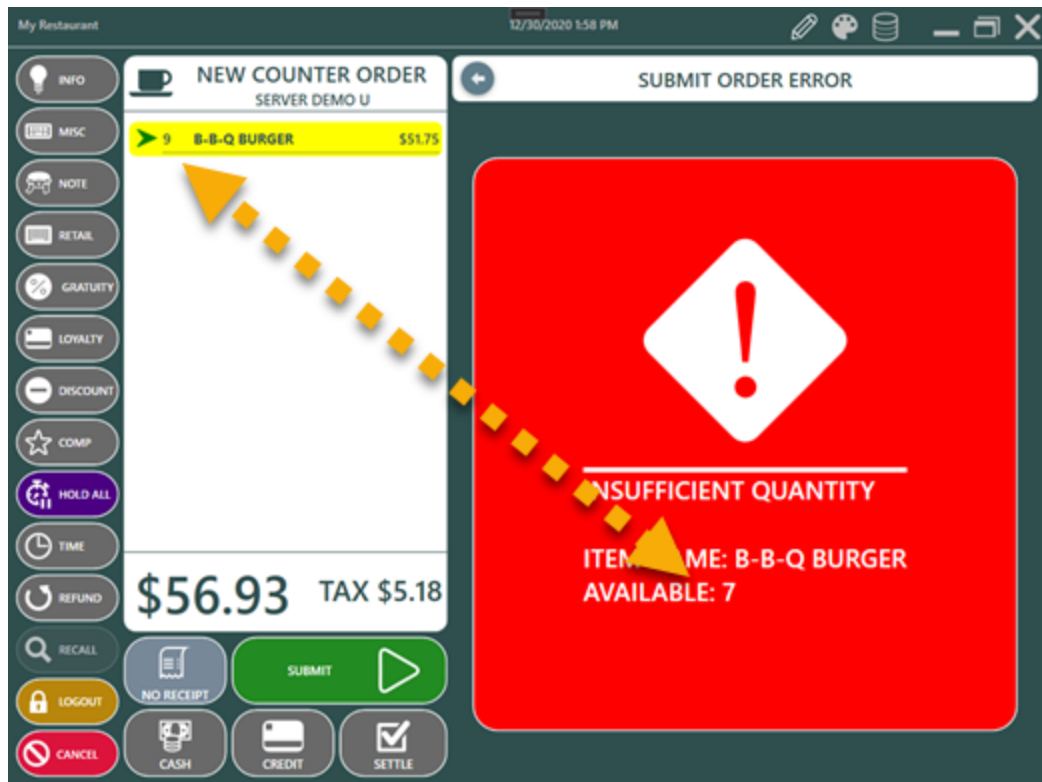
The remaining quantity is displayed on the menu item button and is also verified when the order is submitted.



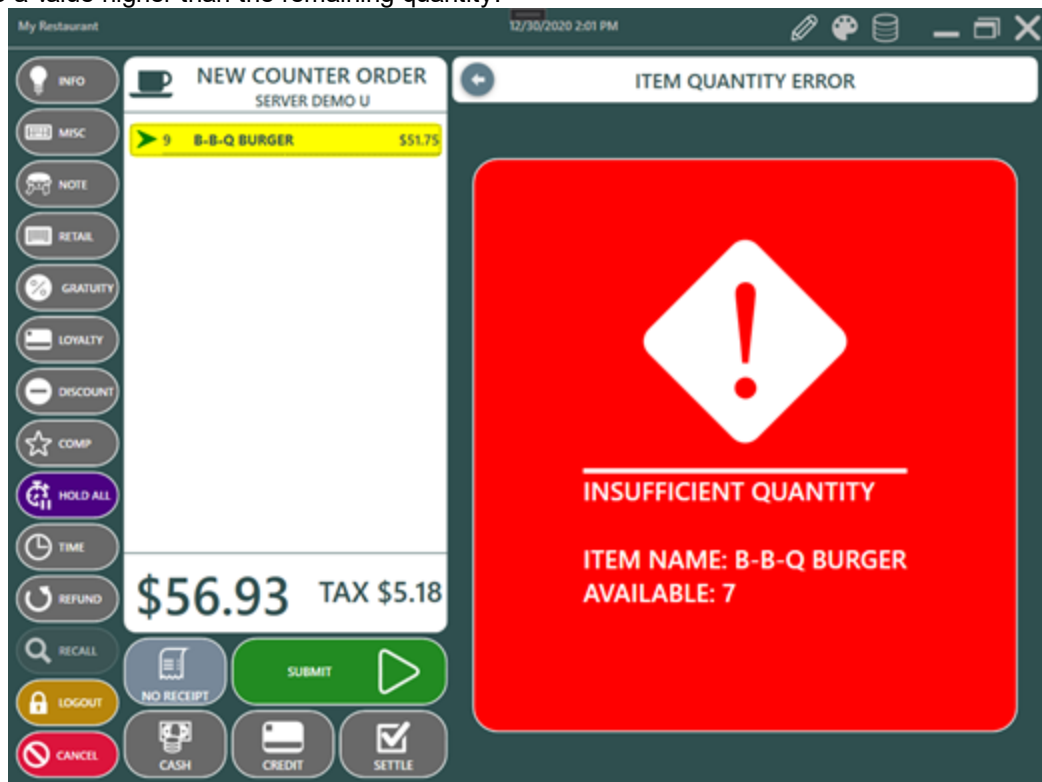
Menu items with zero quantity are disabled and cannot be added to the order.



If the remaining quantity has been depleted after the item has been added to the order but before the order is submitted, an error message is displayed and the order cannot be submitted. This error will occur on systems with multiple pos stations, typically during peak business hours.



A similar error message is displayed if the user attempts to increase the quantity of an existing order item to a value higher than the remaining quantity.



25.4 Bar Menu

25.4.1 Menu Setup

The AmigoPOS bar 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.

- [categories](#) ⁵⁹⁷
- [items](#) ⁵⁹⁹
- [modifiers](#) ⁶⁰¹
- [Bar Prep Items](#) ⁶⁰²
- [Special Price Definitions](#) ⁶⁰³
- [Preferences](#)

Bar Menu Categories

Bar menu categories are defined in the regular menu categories grid, as described in the [menu categories](#) ⁵⁵⁴ help topic. In addition to the fields described in the [Regular Menu Categories](#) ⁵⁵⁴ 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 menu 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

Bar Menu

Add new category +

0 / 50

- 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

Main Settings Menu Item Assignments Button

Search

General Settings

Category Name	MARTINIS
Menu Type	Bar Menu
Button Position	25
Visibility	Visible
Hide Button At This Station	<input type="checkbox"/>
Availability	In-Store and
Always Show Bar Modifiers	<input checked="" type="checkbox"/>
Visible Columns	2
Visible Rows	3
Minimum Age Verification	Not Required

Pricing

Inventory Markup	4.00
Bar Menu Tax Rate	10% [ID:1/SA]
Exclude From Special Pricing	<input type="checkbox"/>
Exclude From Event Pricing	<input type="checkbox"/>
Takeout Non-Taxable	<input type="checkbox"/>

Day/Time Availability

Upcharges

Upcharge 1 Enabled	<input checked="" type="checkbox"/>
Upcharge 1 Description	DOUBLE
Upcharge 1 Prefix	DBL
Upcharge 1 Suffix	
Upcharge 1 Inventory Adjustment	0.50

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.

Menu Categories

Bar Menu

Add new category +

0 / 50

- 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

Main Settings Menu Item Assignments Button

Search

General Settings

Category Name	MARTINIS
Menu Type	Bar Menu
Button Position	25
Visibility	Visible
Hide Button At This Station	<input type="checkbox"/>
Availability	In-Store and Web
Always Show Bar Modifiers	<input checked="" type="checkbox"/>
Visible Columns	2
Visible Rows	3
Minimum Age Verification	Not Required

NEW COUNTER ORDER
SERVER DEMO U

INFO MISC RETAIL GRATUITY LOYALTY DISCOUNT COMP ORDER HOLD ALL TIME RECALL LOGOUT NO RECEIPT CASH CREDIT SETTLE

BOTTLE BEER L-Z WINE SHOTS MARTINIS MIXED DRINKS TOP SHELF WELL

RECIPES ADD ROUND OPEN TABS START TAB

ALAB. SLAMMER	AMAR. SOUR	BENEDICT
BLACK RUSSIAN	BLOODY MARY	BLUE HAWAII
BOMBAY SAPPHIRE	BOURBON SELECT	BRANDY ALEX
BRANDY SOUR	CAESAR	COORS CUTTER
NO	EZ	SPLSH
SPICE	TSCO	WRC SC

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' configuration window. On the left, a sidebar lists menu items under the 'MARTINIS' category. The main area shows the 'General Settings' for the 'STRAWBERRY MARTINI' item. The settings table is as follows:

General Settings	
Item Name	STRAWBERRY MARTINI
Item Name (Language 2)	Strawberry Martini
Menu Category	MARTINIS
Add to Shortcuts	<input type="checkbox"/>
Prep Text	STRAWBERRY MARTINI
Prep Text (Language 2)	STRAWBERRY MARTINI

Below the table, there is a section for 'Item Name' with a description: 'Enter the name to appear on the order entry screen button and custo...'.

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.

The screenshot shows the 'Bar Menu Modifiers' interface. On the left, there is a list of modifiers: 0 RED BULL, 1 DRY, 2 EX DRY, 3 ULT DRY, 4 DIRTY, and 5 FX VFRM. The 'RED BULL' modifier is selected. On the right, the 'Settings' panel is open, showing fields for 'Item Name' (RED BULL), 'Prep Text' (Red Bull), 'Button Position' (dropdown), 'Visibility' (Visible, dropdown), and 'Price' (2.50). There is also a 'Prep Text' section with a placeholder text: 'Enter the text to print on the prep ticket and remote display'.

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**.

The screenshot shows the 'Bar Menu Modifiers' configuration window. On the left, a list of bar prep items is shown, with '1 NO' selected. A red box highlights the 'Bar Prep Items' dropdown menu. On the right, the 'Settings' tab is active, displaying a table with the following fields:

General Settings	
Item Name	NO
Prep Text	
Visibility	Visible
Button Position	1
Reporting	
Id	1

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 their normal width to fill the gap, as shown below.



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

Bar Menu

SpecialName	Type	Category	Item	Day	
+ Click here to add a new row					
\$1 Shots	Category	SHOTS		All	12:00

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
- **Price Method:** Specify whether this is a fixed or percentage off discount.
- **Deduct Amount:** Enter the amount or percentage to deduct from the regular price
- **Day:** 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.
- **Start:** The time that the special becomes active
- **End:** 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

To add a new special price definition, click Add New to open the editor. To edit an existing special price definition using the dialog editor, click the edit icon in the grid row header.

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 ☒
Check the box 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 ☐
Check the box to disable bar menu (speed bar) cash tender button Local setting: configure at each pos station.

Hide Recall Button ☐
Check the box to disable bar menu (speed bar) recall. Local setting: configure at each pos station.

Hide Add Round Button ☐
Check the box to disable bar menu (speed bar) add round button. Local setting: configure at each pos station.

Hide Drink Recipes Button ☐
Check the box to disable bar menu drink recipes button. Local setting: configure at each pos station.

Hide Shortcuts Button ☐
Check the box to disable bar menu shortcuts button. Local setting: configure at each pos station.

BAR MENU SETTINGS

Order Bar Menu Items Alphabetically ☒
Check the box to order bar menu items alphabetically on the order entry screen. Set to no to order by button position.

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

*Settings with an asterisk apply to the local pos station only

25.4.2 Order Entry

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.



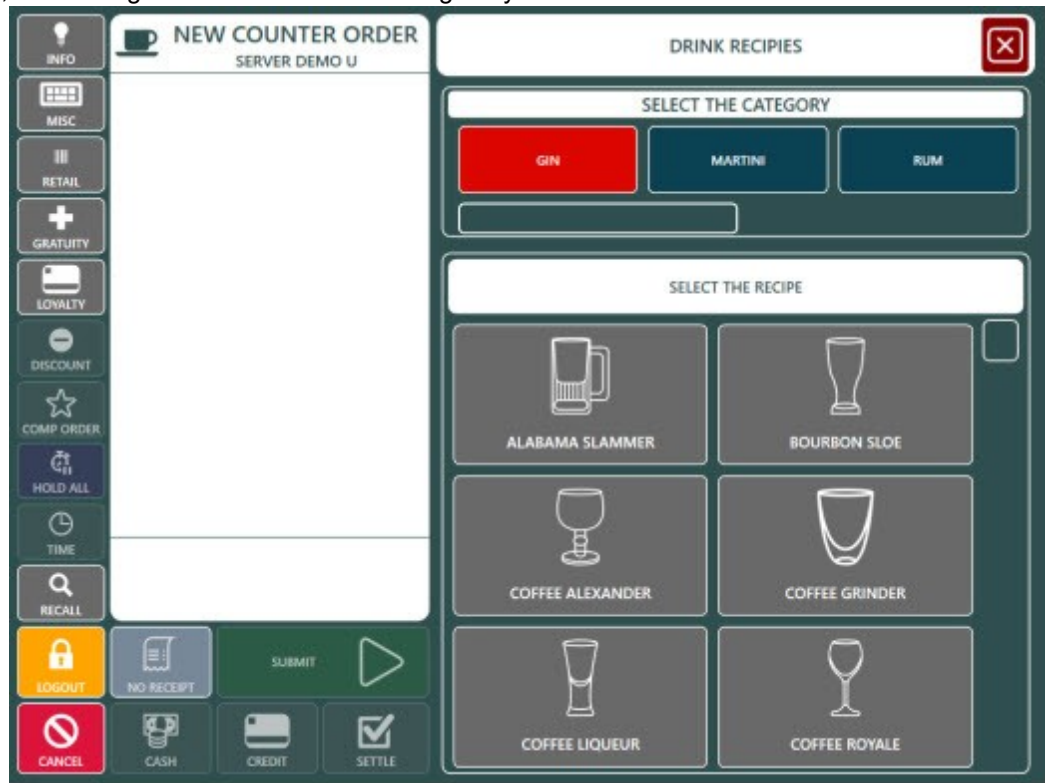
In the Top Shelf category shown below, each item is available as a regular (default price), double, triple, up, Shot, Tall and Short. Refer to the Bar Menu setup topic for information on assigning upcharge buttons to categories and setting a price for each upcharged menu item.



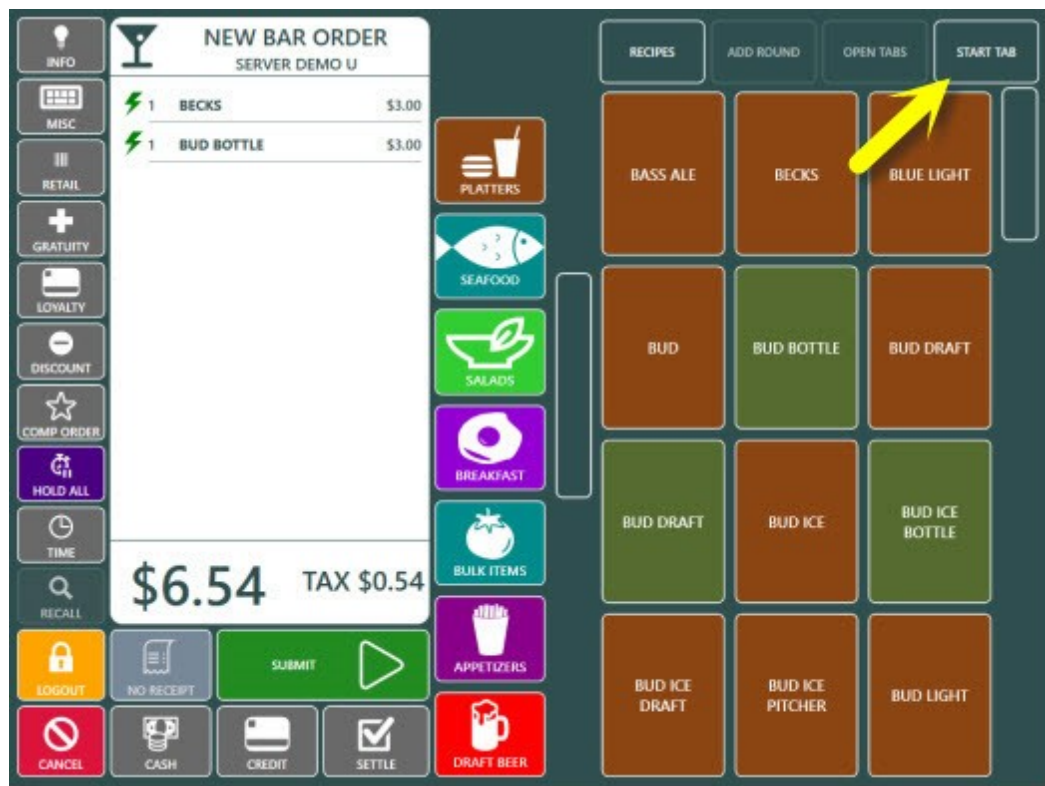
Bar menu modifiers are similar to regular menu modifiers except that bar menu modifiers are assigned to a menu category and appear below the bar menu item screen, as shown below.



Bar menu item recipes and instructions can be stored in the database along with the corresponding glass, eliminating bartender confusion during busy hours.

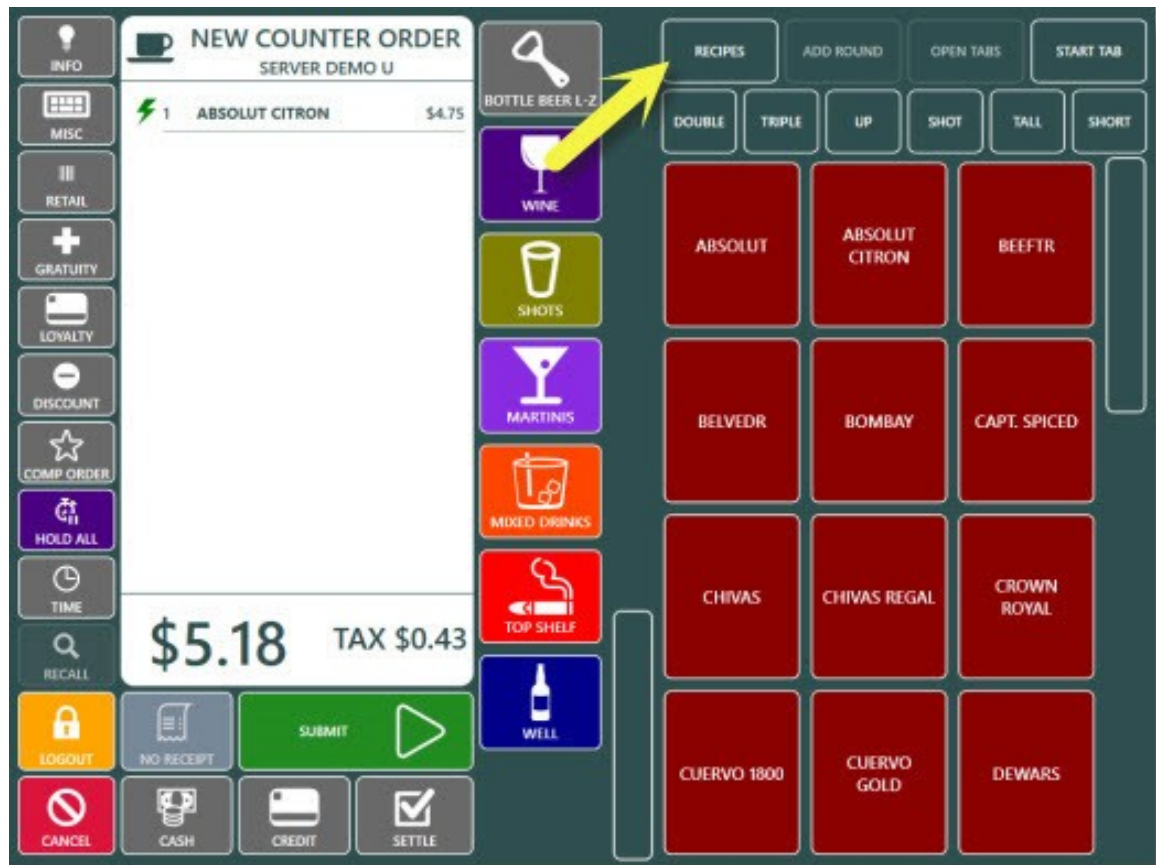


Bar tabs can be preauthorized with a credit card and can be prevented from exceeding the pre-authorization limit. See the [Bar Tabs](#) ⁶⁹⁴ topic for additional information.

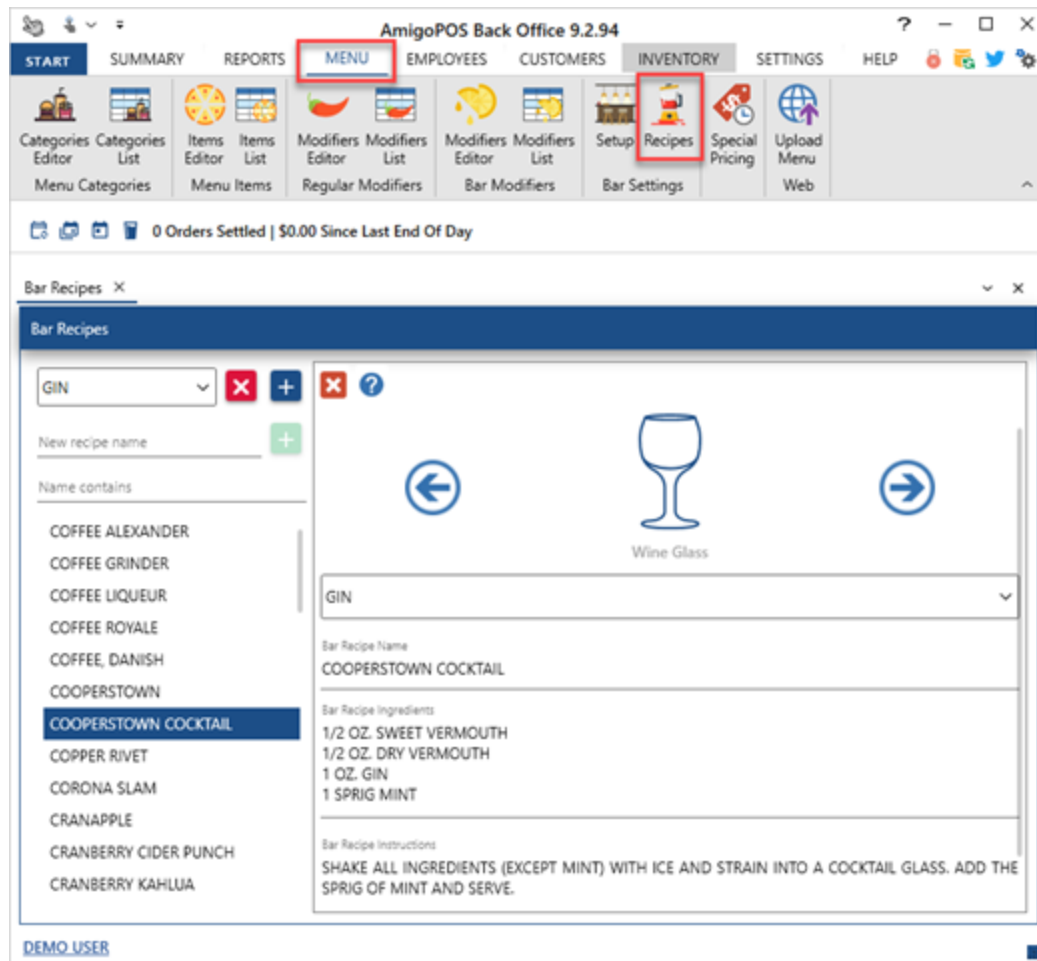


25.4.3 Bar Menu Recipes

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.



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 Settings | Recipes**. Each recipe can have a bar glass image assigned to encourage usage of correct glass by new employees.



25.5 Retail Items

25.5.1 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](#)^[616] 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](#)^[304] 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](#)^[392] 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](#)^[554] 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

1 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

- 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"/>

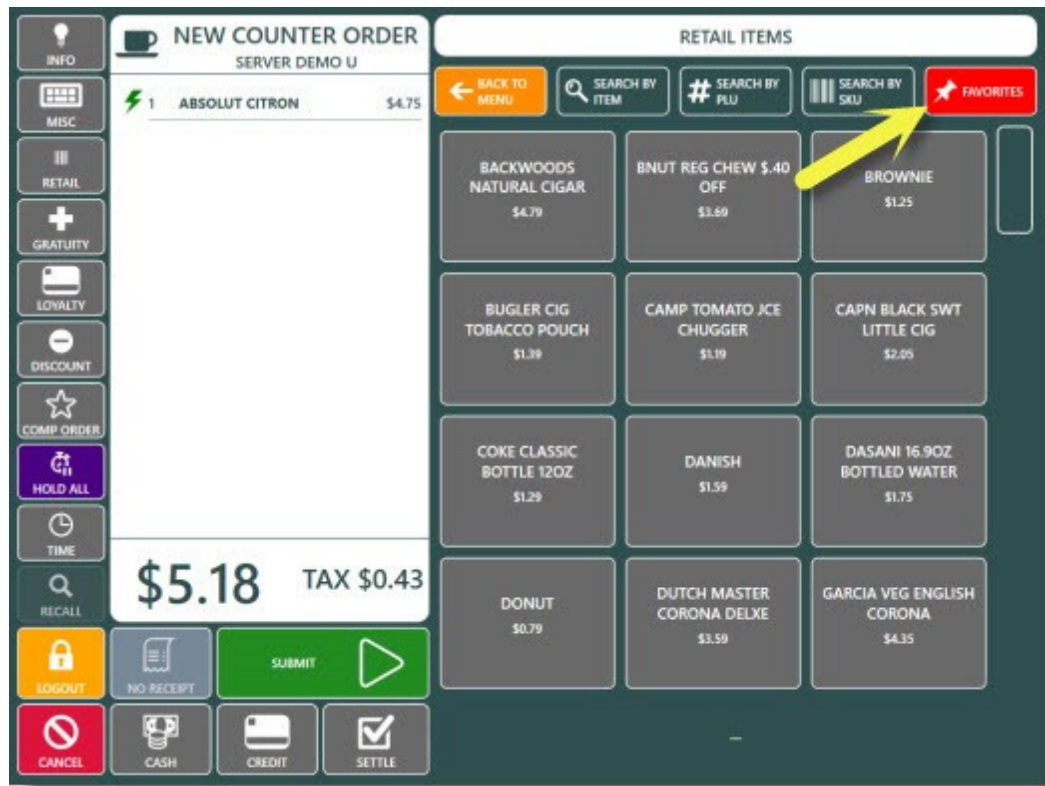
Surcharges

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

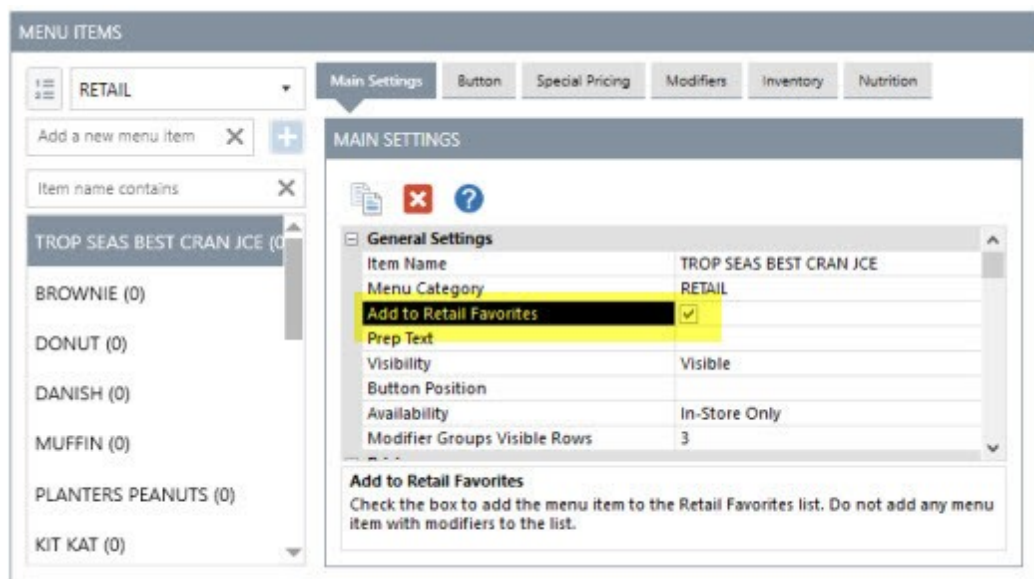
- Synchronize the database and start a new retail order to verify that the retail favorites list is displayed when the order is started.



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.

REGULAR MENU		REFRESH	
PRICE COLUMNS	PRINTER COLUMNS	AVAILABILITY COLUMNS	
ID	ITEM NAME	SKU	RETAIL FAVORITE
Click here to add a new row			
RETAIL - 18 Menu Items			
792	BROWNIE	79479320020	<input checked="" type="checkbox"/>
680	CAMP TOMATO JCE CHUGGER	5100013797	<input checked="" type="checkbox"/>
830	COKE CLASSIC BOTTLE 12OZ	04979407	<input checked="" type="checkbox"/>
790	DANISH	79477320020	<input checked="" type="checkbox"/>
831	DASANI BOTTLED WATER	031191708301	<input checked="" type="checkbox"/>
701	DONUT	70478220020	<input checked="" type="checkbox"/>

Menu Items Grid

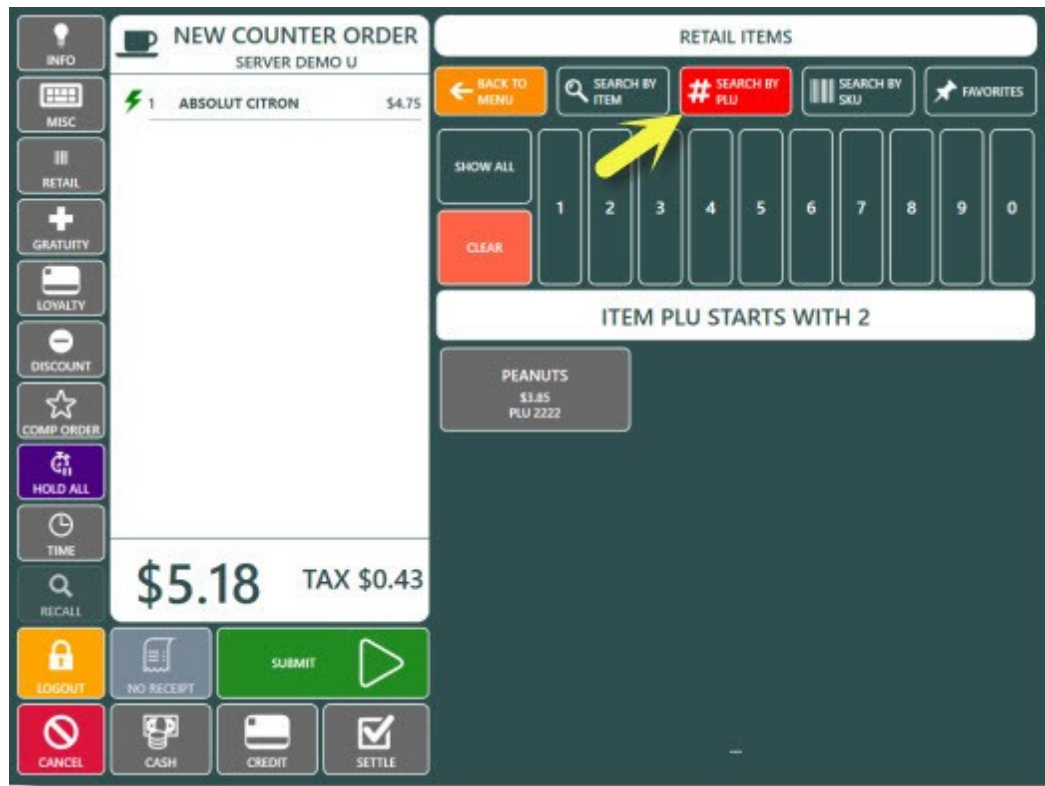
To look up an item by barcode, press **SEARCH BY SKU** button at the top of the screen to activate the SKU number pad. Begin entering the SKU number until the correct item appears on the list.

The screenshot shows the 'NEW COUNTER ORDER' screen with the following details:

- Order Summary:** 1 ABSOLUT CITRON \$4.75. Total: \$5.18, TAX: \$0.43.
- RETAIL ITEMS Section:**
 - Buttons: BACK TO MENU, SEARCH BY ITEM, # SEARCH BY PLU, **SEARCH BY SKU** (highlighted), FAVORITES.
 - NUMERIC KEYPAD: 1, 2, 3, 4, 5, 6, 7, 8, 9, 0.
 - ITEM SKU STARTS WITH 2
 - Item List:
 - BUGLER CIG TOBACCO POUCH \$1.39 (SKU 2720000503)
 - KITE MENTH CIG TOB POUCH \$1.39 (SKU 2720000525)
 - MARL NYS MEN LT BOX BP \$4.54 (SKU 2820000471)
 - MARLBORO NYS 27 BLEND BP \$4.54 (SKU 2820000265)
 - NEWPORT BOX NYS ONLY 8.50 \$5.09 (SKU 2810000425)
 - NEWPORT BOX NYS ONLY 8.50 \$5.09 (SKU 2810000435)
 - NEWPORT LT BOX NYS 8.50 \$5.09 (SKU 2810000430)
 - PARLIAMENT NYS LT BOX BP \$4.54 (SKU 2820000784)
 - PLANTERS CASH TUBE PP.99 \$0.99 (SKU 2900007518)
 - PLANTERS H/R CASH TBE 99 \$0.99 (SKU 2900007539)
 - PLANTERS SMKALM TBE .99 \$0.99 (SKU 2900007541)
 - PLANTERS TRL MIX TBE .99 \$0.99 (SKU 2900007446)
- Bottom Bar:** LOGOUT, NO RECEIPT, CASH, CREDIT, SETTLE, SUBMIT.

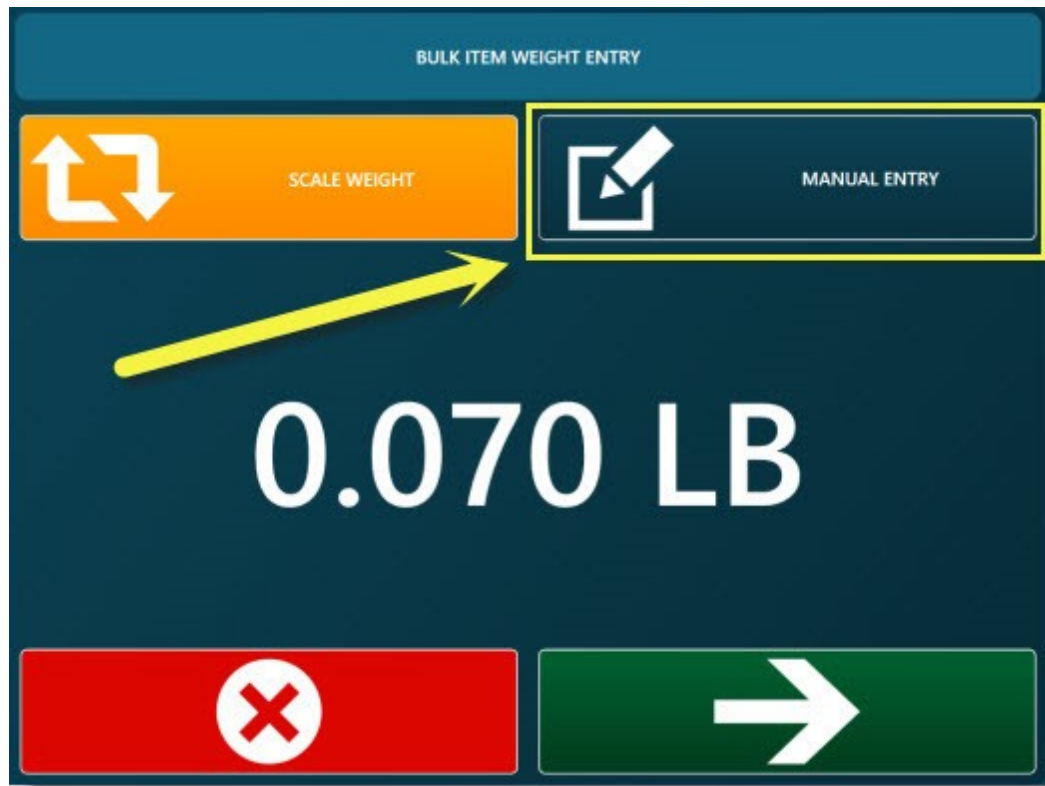
Retail Item Search By SKU

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

25.5.2 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](#) ⁶¹⁶
2. [Program Scale PLU list](#) ⁶¹⁷
3. [Enter PLU list in Back Office](#)

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 S P P P P C

Format 2: D D I I I I S P P P P C

Format 3: D D I I I I I P P P P C

Format 4: D D I I I I I P P P P C

Format 5: D D I I I I P P P P P C

Format 6: D D I I I P P P P P P C

D = department (always 02 for EAN or 2 for UPC)

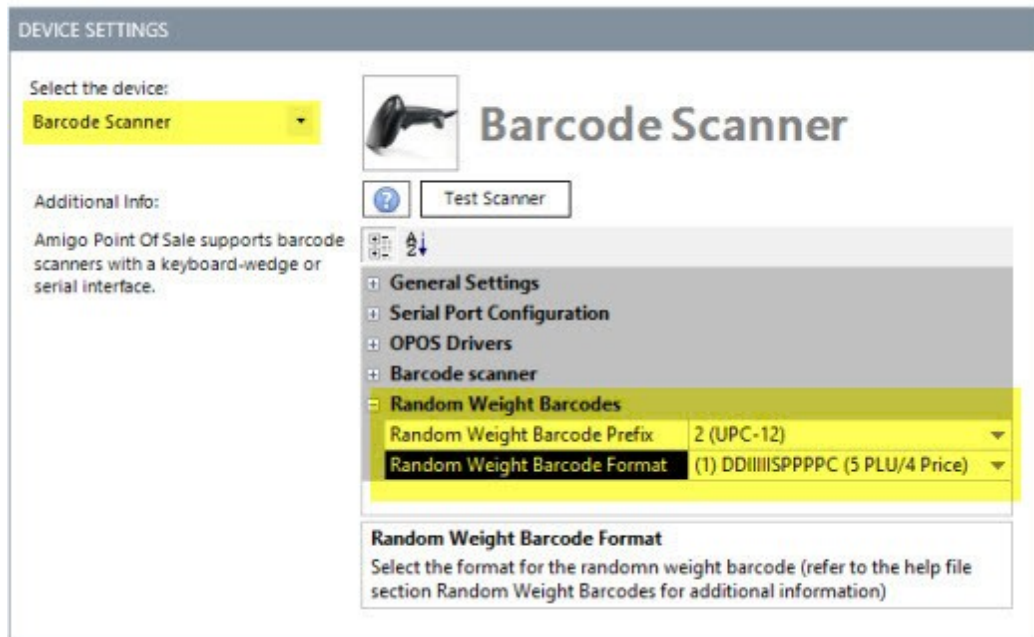
I = PLU

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 | Devices | 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' application window. On the left, there's a list of items: PEANUTS (1), LICORICE (2), COFFEE BEANS (3), HERSHEY KISS (4), and PISTACHIOS (5). The main area is titled 'MAIN SETTINGS' and contains a table of item details. The 'Pricing' section is expanded, showing fields like Price (3.85), Tax Rate (9% [ID:1/Sales Tax]), Revenue Center (FOOD), SKU (0), Retail Inventory (Add Inventory item), and PLU (2222). The PLU field is highlighted in yellow. Below the table, there's a section for 'Price By Weight Multiplier' with a value of 1/2 and a suffix of 1/2LB.

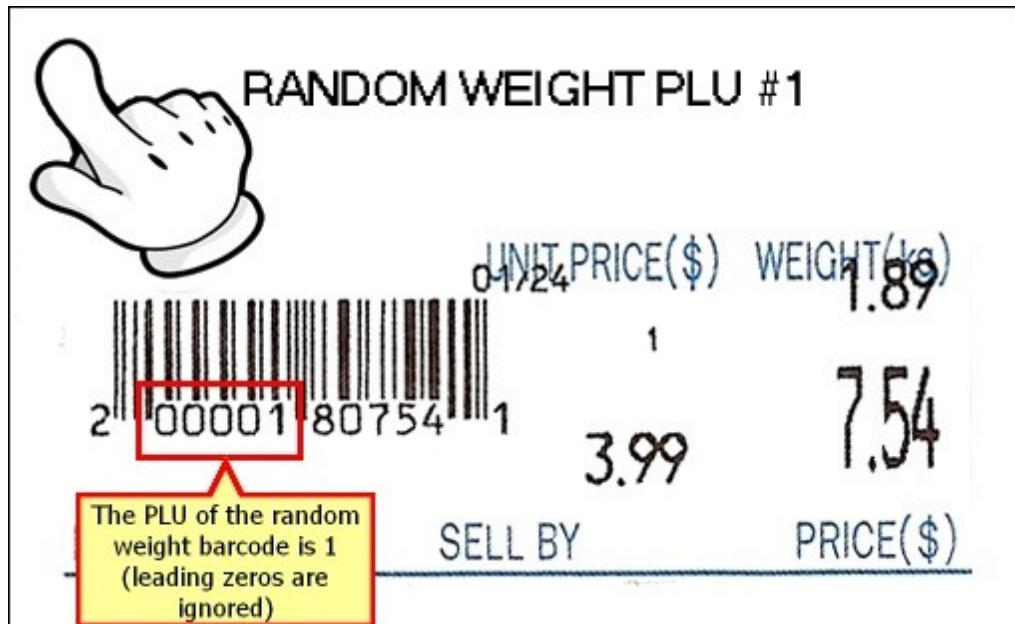
General Settings	
Pricing	
Price	3.85
Tax Rate	9% [ID:1/Sales Tax]
Revenue Center	FOOD
SKU	0
Retail Inventory	Add Inventory item
PLU	2222
Sold By Weight	<input checked="" type="checkbox"/>
Price By Weight Multiplier	1/2
Price By Weight Suffix	1/2LB

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.



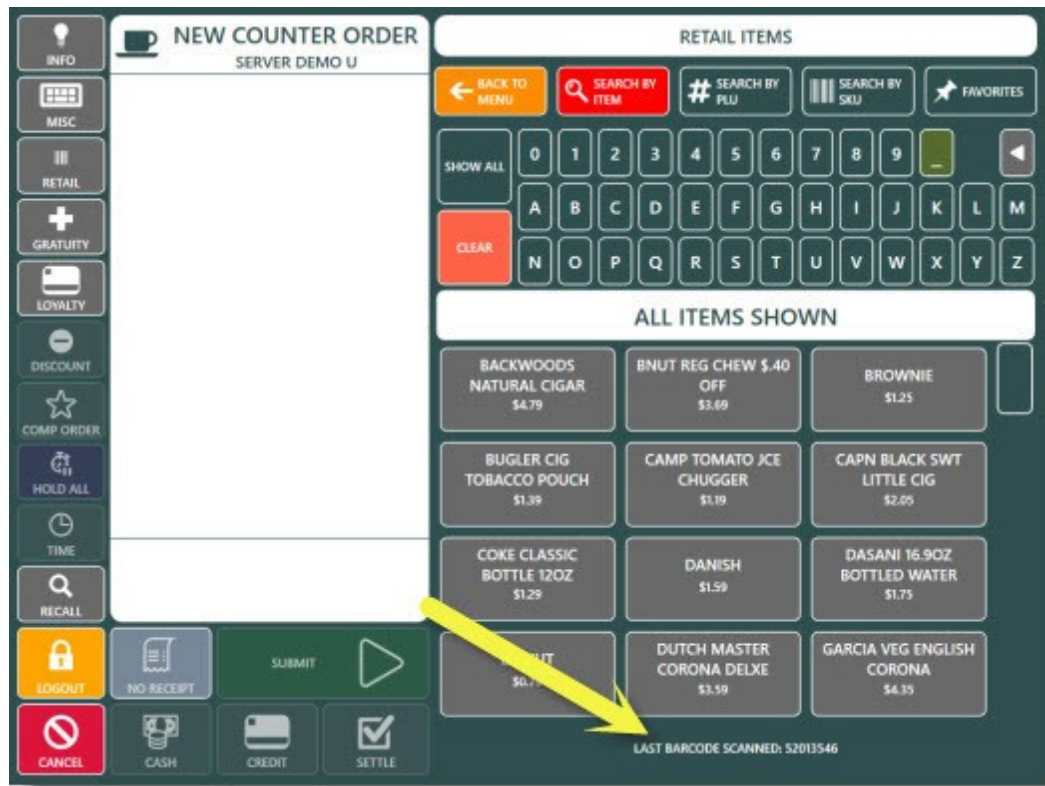
Random Weight Barcode Example (Format 1/UPC-12)

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.

25.5.3 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
- **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

The following example describes the setup and usage of a bulk menu item that is priced per kilogram with the weight is entered in grams.

1. Open the menu item editor and select Peanuts from the Bulk menu items category. Set the price to \$15.50, which is the price per kilogram. Check the box next to Sold By Weight, set the Price By Weight Multiplier to 0.0010 and set the Price By Weight Suffix to kg.

AmigoPOS Back Office 9.2.28

START SUMMARY REPORTS MENU EMPLOYEES CUSTOMERS INVENTORY SETTINGS HELP

Categories Editor Categories List Items Editor Items List Modifiers Editor Modifiers List Modifiers Editor Modifiers List Setup Recipes Special Pricing Upload Menu Web

Menu Categories Menu Items Regular Modifiers Bar Modifiers Bar Settings

Menu Items

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 Web Orders

Price 15.50

Tax Rate 10% (ID.1/SALES TAX)

Container Charge 0.00

Bottle Deposit 0.00

SKU 0

Time Based Pricing ☐

Time Interval 0

PLU 2.222

Sold By Weight ☒

Price By Weight Multiplier 0.0010

Price By Weight Suffix kg

Exclude From Special Pricing ☐

Exclude From Event Pricing ☐

Exclude From Discounts ☐

Price By Weight Multiplier

The menu item price is divided by the multiplier to determine the price per scale unit. For example, if the default unit of weight is the kil...

ROY.BATTY

2. Navigate to Settings | Main Settings | Order Entry Screen and set the Weight Scale Unit to gr. Set the Guest Check Item Name Length to 25 in order to fit both the menu item name and weight on the same line.

The image displays two screenshots of the AmigoPOS Back Office 9.2.28 interface, specifically the 'Order Entry Screen Settings' window. The top screenshot shows the 'Weight Scale Unit' set to 'gr'. The bottom screenshot shows the 'Guest Check Item Name Length' set to 25.

AmigoPOS Back Office 9.2.28

Order Entry Screen Settings

Order Entry Screen | Removed Items | Void Reasons | Refund Reasons | Age Verification | Word Filters

Setting	Value
Enable Fractional Quantity Buttons	<input checked="" type="checkbox"/>
1/2 Qty Button	<input checked="" type="checkbox"/>
1/3 Qty Button	<input checked="" type="checkbox"/>
1/4 Qty Button	<input checked="" type="checkbox"/>
1/5 Qty Button	<input checked="" type="checkbox"/>
1/6 Qty Button	<input checked="" type="checkbox"/>
Retail Module	
Bottle Deposit Text	BTL DEPOSIT
Weight Scale Unit	gr
Inventory suggested price markup	4.00
Group Retail Items	<input checked="" type="checkbox"/>
Verify Retail Inventory	<input type="checkbox"/>

Display Modifiers Only If Mandatory
Show modifiers only when mandatory modifier groups are assigned to the menu item

AmigoPOS Back Office 9.2.28

Order Entry Screen Settings

Order Entry Screen | Removed Items | Void Reasons | Refund Reasons | Age Verification | Word Filters

Setting	Value
Fixed Gratuity Amount 3	0.20
Fixed Gratuity Amount 4	-1.00
Appearance	
Guest Check Item Name Length	25
Guest Check Width	42
Menu Categories Width	18
Menu Categories Visible Rows	Guest Check Width Enter the whole number percentage of the screen width to use for the order entry screen guest check.
Order Entry Buttons	
Button Image Size To Fit	<input type="checkbox"/>
Add Note Button	<input checked="" type="checkbox"/>
Cancel Button	<input checked="" type="checkbox"/>
Cash Button	<input checked="" type="checkbox"/>

Guest Check Item Name Length
Enter the maximum number of characters in the item name to display on the order entry screen guestcheck

3. Submit a new order, open the receipt template editor in Back Office | Settings | Receipt Templates and verify that the order item is properly formatted on the customer receipt.

The screenshot displays the AmigoPOS interface, divided into two main sections: a front-end counter order screen and a back-office menu editor.

Front-end Counter Order Screen:

- Header:** "NEW COUNTER ORDER" and "SERVER ROY B".
- Order List:** 1 200gr PEANUTS (15.50/kg) \$3.10.
- Subtotal:** \$3.41, **TAX:** \$0.31.
- Navigation Menu (Left):** INFO, MISC, NOTE, RETAIL, GRATUITY, LOYALTY, REWARDS, DISCOUNT, COMP, HOLD ALL, TIME, REFUND, RECALL, NO RECEIPT, BANK, CASH, CREDIT, LOGOUT, CANCEL.
- Category Buttons (Center):** SANDWICHES, BURGERS, PLATTERS, SEAFOOD, SALADS, BREAKFAST, BULK ITEMS.
- Item Selection Area (Right):** PEANUTS, COFFEE BEANS, HERSHEY KISS, PISTACHIOS.
- Buttons:** SEARCH, SUBMIT.

Back-office Menu Editor (AmigoPOS Back Office 9.2.28):

- Navigation:** START, SUMMARY, REPORTS, MENU, EMPLOYEES, CUSTOMERS, INVENTORY, SETTINGS, HELP.
- Menu Editor:** Categories Editor, Menu Categories, Items Editor, Menu Items, Regular Modifiers, Bar Modifiers, Setup Recipes, Bar Settings, Special Pricing, Upload Menu, Web.
- Receipt Templates:** A window showing the "Default Receipt Template" with a list of tokens (Age Verification, Balance Due, Barcode, Bar Tab Name, Call Center, Column, Column Double Width, Customer Account Name, Customer First Name, Customer Last Name, Customer Full Name, Customer Street Number) and their corresponding HTML/JSON code snippets.
- Receipt Preview:** A visual representation of the receipt for "Rue de Rivoli, 75001 Paris, France". It shows the order details: 1 200gr PEANUTS (15.50/kg) 3.10 T1. The subtotal is \$3.10, tax is \$0.31, and the total is \$3.41. A red arrow points to the item "200gr PEANUTS (15.50/kg)".

25.5.4 Stock Verification

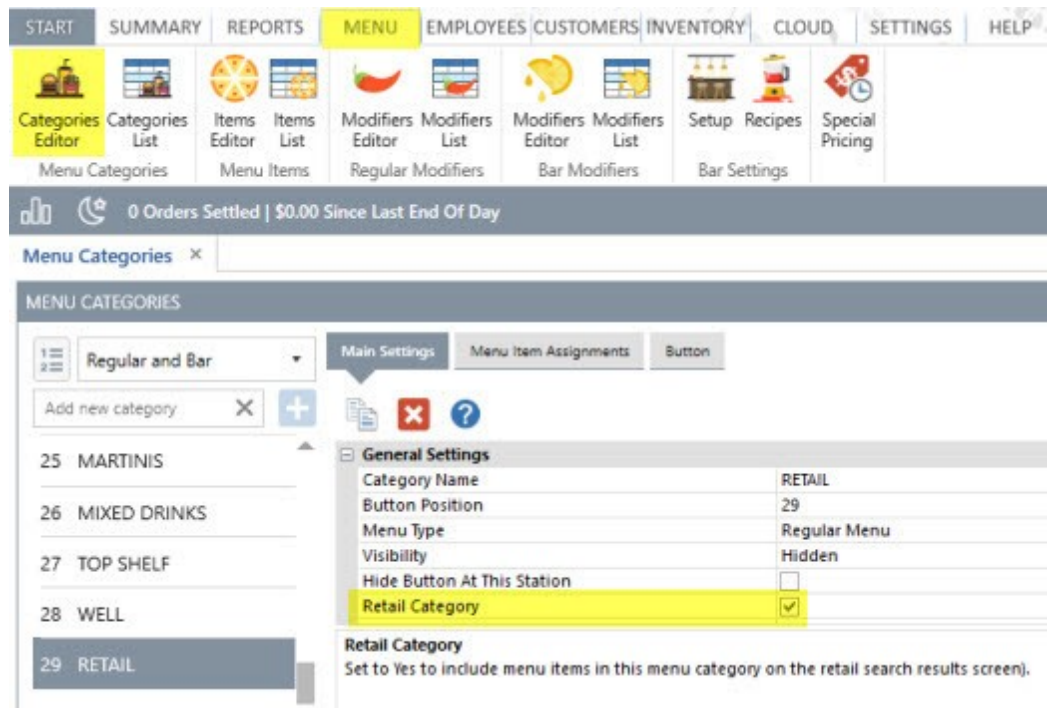
When adding items to an order, users can be warned that a retail item is out of stock by enabling the **Verify Retail Inventory** setting in **Back Office | Settings | Main Settings | Order Entry | Retail**.

The screenshot shows the AmigoPOS 8 Back Office interface. The top navigation bar includes tabs for START, SUMMARY, REPORTS, MENU, EMPLOYEES, CUSTOMERS, INVENTORY, CLOUD, and SETTINGS. The SETTINGS tab is active, showing various configuration options like 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, and Images. Below this, a status bar shows '0 Orders Settled | \$0.00 Since Last End Of Day'. The 'Main Settings' section is expanded, showing sub-tabs for General Settings, Sales Tax, Order Types, Order Entry, User Interface, Deliveries, Settle Screen, Manager Screen, Time Clock, and Employee. The 'Order Entry' sub-tab is selected, and within it, the 'Retail' sub-tab is highlighted. The 'RETAIL SETTINGS' table is displayed with the following data:

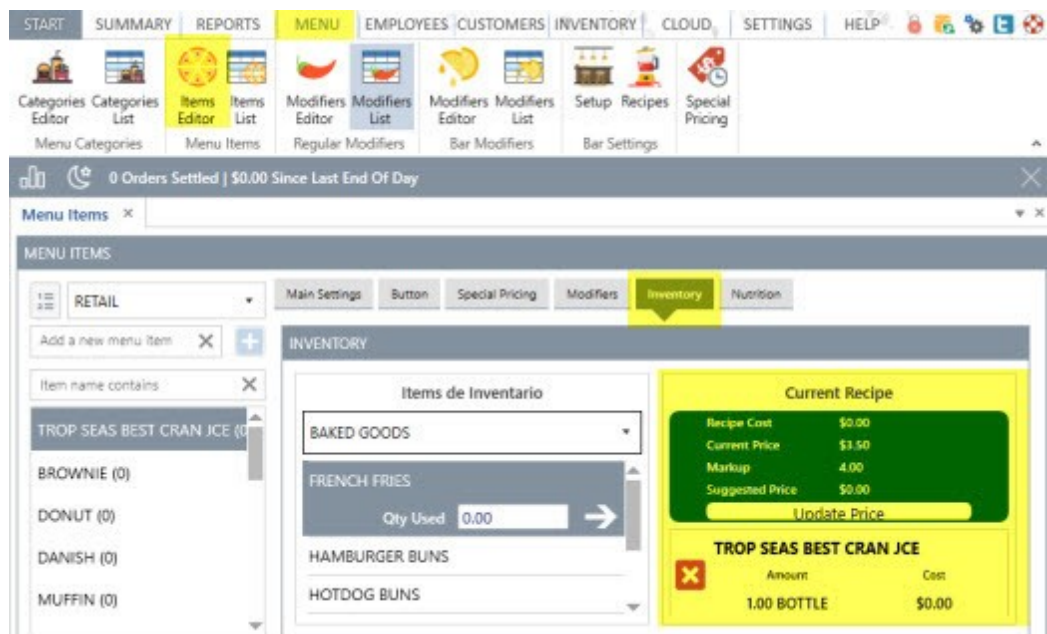
RETAIL SETTINGS	
Bottle Deposit Text	BTL DEPOSIT
Default Misc Item Name	MISC ITEM
Group Retail Items On Single Ticket Line	Yes
Inventory Suggested Price Markup	4
Use Default Misc Item Name	No
Verify Retail Inventory	Yes
Weight Scale Unit	LB

Below the table, a note states: '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.'

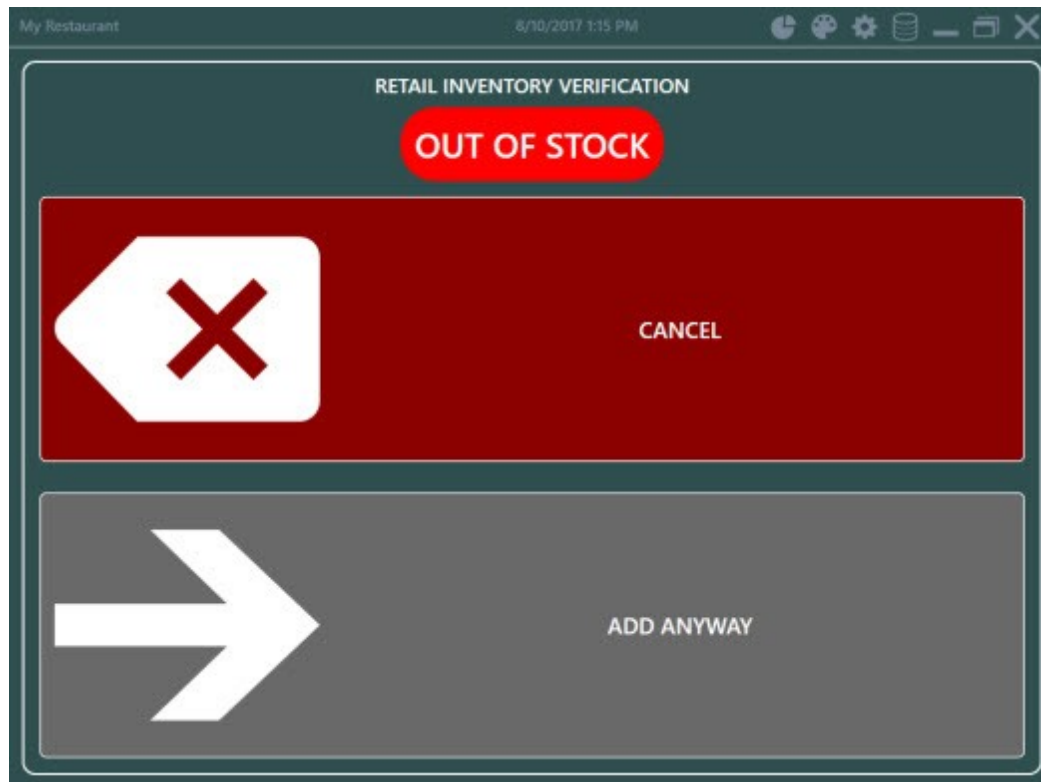
Set the menu category **Retail Category** setting so that each item in the category is checked for sufficient stock before the item is added to the order.



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.



25.6 Price Rules

Price rules are a new feature intended to replace special pricing and offer additional flexibility when pricing menu items. The menu item's default price is applied if no price rules are defined or no price rules match the given constraints. The menu item's special price definitions are ignored when a price rule meets the given constraints.

The screenshot shows the 'Price Rules' configuration interface. At the top, there are tabs: 'Main Settings', 'Buttons', 'Price Rules' (highlighted with a red arrow), 'Special Pricing', 'Modifiers', 'Inventory', and 'Web Orders'. Below the tabs, a text box explains that price rules are used to replace special pricing and offer flexibility. The main form contains several sections: a 'Test Price Rule' dropdown with '+' (add), '-' (remove), and '?' (help) buttons; a 'Description' field with a character count (15 / 50); a 'Priority' dropdown set to '0 (Highest Priority)'; an 'Order Type' dropdown set to 'All Order Types'; a 'Price Method' dropdown set to 'Fixed'; a 'Price' field set to '\$0'; a 'Date Range' section with a 'Set Date Range' checkbox; a 'Time Of Day' section with a 'Set Time Range' checkbox; a 'Day Of Week' section with checkboxes for all days (Sun-Sat) all checked; a 'Customer Type' section with a dropdown set to 'Default' and an 'Edit Customer Types' button; and a 'Status' section with an 'Enabled' checkbox. At the bottom is a large blue 'Save Changes' button.

The following settings are used to configure the price rule.

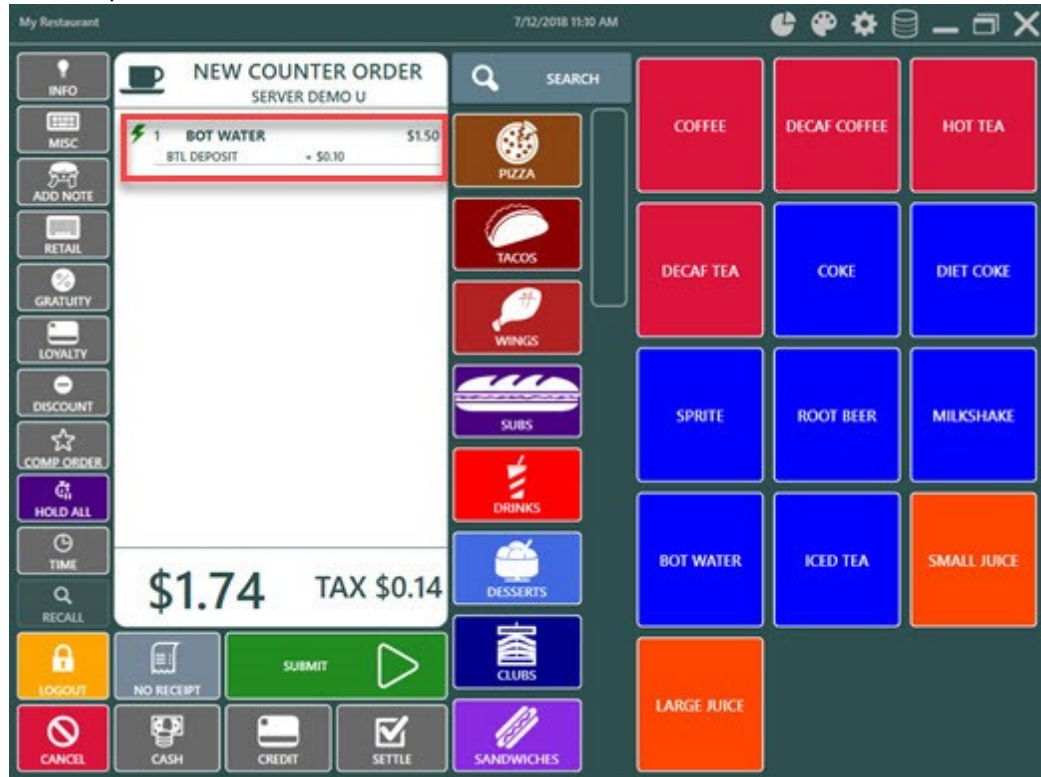
- **Description:** Enter a brief description of the price rule
- **Priority:** For menu items with more than one price rule, set the priority of the price rule in relation to the other price rules. When there is more than one matching price rule, the price rule with the lower priority is used.
- **Price Method:** Specify whether the price is a fixed amount or percentage.
- **Price:** The price or percentage to use when all rules match. This value can be higher or lower than the default menu item price.
- **Enabled:** The price rule can be temporarily disabled by un-checking the box. For price rules that are no longer required, delete the price rule by clicking the red button at the top.

The following constraints are currently available for each price rule. The price is in effect only when all of the selected constraints are met.

- **Order Type:** The price rule is in effect only for the selected order type
- **Requires Loyalty Card:** The price rule is in effect only if a loyalty card has been assigned to the order
- **Date Range:** The price rule is in effect only for the selected date range
- **Time Range:** The price rule is in effect only for the selected time range
- **Day Of Week:** The price rule is in effect only for the selected weekdays
- **Customer Type:** The price rule can be assigned to a specific customer type. The customer type is assigned to each customer on the customer information screen.

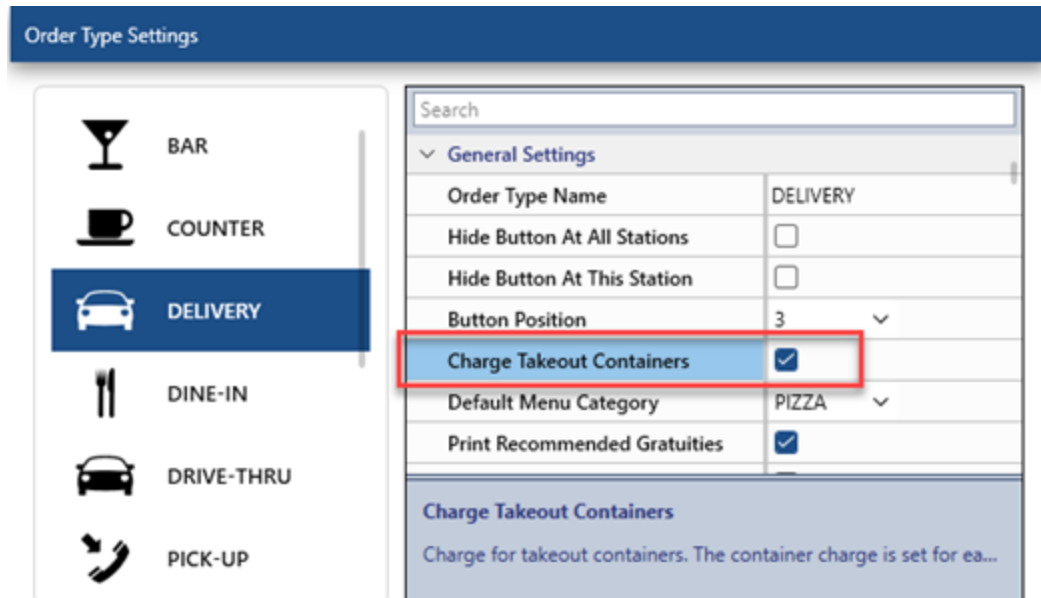
25.7 Bottle Deposits

Bottle deposits can be assigned to regular and bar menu items in order to charge the customer a **non-taxable fixed amount** that will be refunded upon the bottle's return. Complete the following steps to enable bottle deposits.



Order Types

Enable the **Charge Takeout Containers** setting for each [order type](#)⁷²⁰ that should enforce bottle deposits.



Customer Receipt

Bottle deposits are printed on the customer receipt below each order item by default. The bottle deposits total can also print on the customer receipt by inserting the `<BottleDeposit />` [receipt template](#) token as follows.

```
<Validate=BottleDeposit /><TextSize=12 />Bottle  
Deposit<Column /><TextAlign=Right /><BottleDeposit />
```

```

14
15 <OrderItems />
16
17 <TextSize=12 />Subtotal<Column /><TextAlign=Right /><Subtotal />
18 <Validate=BottleDeposit /><TextSize=12 />Bottle Deposit<Column /><TextAlign=Right /><BottleDeposit />
19 <Validate=Exchange /><TextSize=12 />Exchange<Column /><TextAlign=Right /><Exchange />
20 <Validate=DeliveryCharge /><TextSize=12 />Delivery<Column /><TextAlign=Right /><DeliveryCharge />
21 <Validate=MandatoryGratuity /><TextSize=12 />Gratuity<Column /><TextAlign=Right /><MandatoryGratuity />
22 <Validate=TaxTotal /><TextSize=12 />Tax<Column /><TextAlign=Right /><TaxTotal /><Line />
23 <TextSize=12 />Total<Column /><TextAlign=Right /><TotalAmount />
24 <Validate=SplitEvenHide /><Line />
25 <Validate=SplitEvenHide /><TextSize=15 />Balance Due<Column /><TextAlign=Right /><BalanceDue />
26
27 <Validate=SplitEven /><Line /><TextBold />
28 <TextSemiBold /><Validate=SplitEven /><TextSize=12 /><TextBold /><TextAlign=Center />*Total Split By <Split
29 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right
30 <Validate=SplitEven /><Line />
31
32 <Payments />
33
34 <TextAlign=Center /><TextSize=12 />Thank You!Come Again
35 <Barcode />
36
37 <TextAlign=Center /><TextSize=14 />Order No <OrderNumber />
38
39 <TextSize=11 />Gratuity suggestions<ColumnDoubleWidth /><TextAlign=Right />25% <PercentTotalBeforeDiscount

```

1	SMALL CH & PEP	8.50	T1
	ARTICHOKE	2.50	T1
1	COKE	1.25	T1
	BTL DEPOSIT	0.25	T1

Subtotal	\$12.50
Bottle Deposit	\$0.25
Delivery	\$2.20
Tax	\$1.23
Total	\$15.93

Balance Due	\$15.93
-------------	---------

Bottle Deposit Text

The text to appear under the order item next to the bottle deposit amount is set in back office | settings | main settings | order entry screen under the retail module settings.

Order Entry Screen Settings

Order Entry Screen Removed Items Void Reasons Refund Reasons Age Verification Word Filters

Search

- > Customer Receipt
- > Appearance
- > Regular Menu
- > Bar Menu
- > Discounts
- > Misc Items
- > Bar Tabs
- > Order Entry Buttons
- > Fractional Quantity Buttons
- ▼ Retail Module
 - Bottle Deposit Text** BTL DEPOSIT
 - Weight Scale Unit LB
 - Print Bulk Item Label ☐
 - Inventory Suggested Price Markup 4.00

Bottle Deposit Text

Text to display on reports and print on customer receipt for retail item bottle deposits

Bottle Deposit Amount

Specify the bottle deposit for each menu item in the menu items editor under the Pricing heading.

Menu Items

DRINKS

Add a new menu item

0 / 255

Item name contains

- COFFEE (1)
- DECAF COFFEE (2)
- HOT TEA (3)
- DECAF TEA (4)
- COKE (9)**
- DIET COKE (10)
- SPRITE (11)
- ROOT BEER (12)

Main Settings Button Special Pricing Modifiers Inventory Web Orders

Search

- > General Settings
- ▼ Pricing
 - Price 1.25
 - Tax Rate 10% [ID:1/SALES TAX] ▼
 - Container Charge 0.00
 - Bottle Deposit** 0.25
 - SKU 0
 - Time Based Pricing ☐

Bottle Deposit

Amount to charge for the bottle deposit. The bottle deposit is applied only if order type is set to charge for takeout containers.

Mobile Apps

26 Mobile Apps

26.1 Overview

The pos tablet application is intended for table side ordering. The AmigoPOS Tablet Server, a component of the [data service](#)^[235] application, 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.

The Android tablet pos is a lightweight edition of AmigoPOS intended to run on 7" or larger Android tablets.

The Windows tablet POS is a lightweight edition of AmigoPOS intended to run on 8" or larger Windows 10 and Windows 11 tablets.



26.2 Windows Tablet Setup

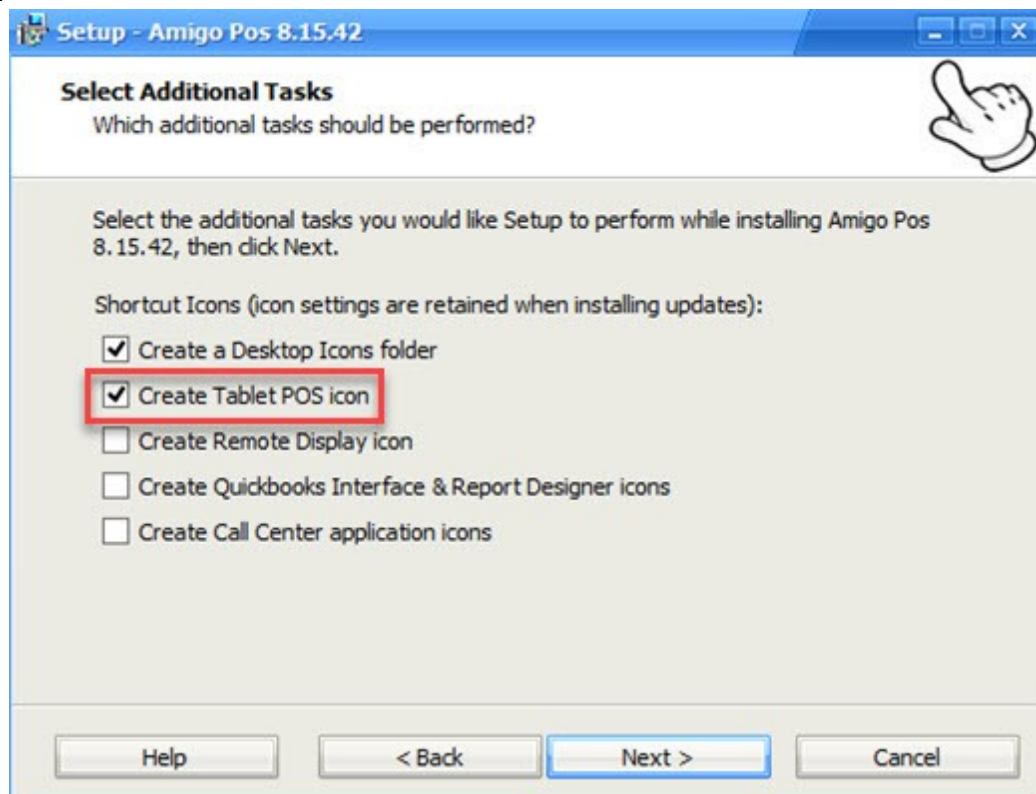
Installation

The tablet pos user interface and data service application are included in the AmigoPOS installer. The data service application runs at the main pos station and uses the existing [receipt printer](#)^[385] and [prep printer](#)^[344] settings.

Verify that each tablet is connected to the local network and install AmigoPOS on each tablet. Choose **Do not install SQL Server Express** on the database configuration screen.



Select Create Tablet POS icon on the Select Additional Tasks screen, complete the installation and reboot.

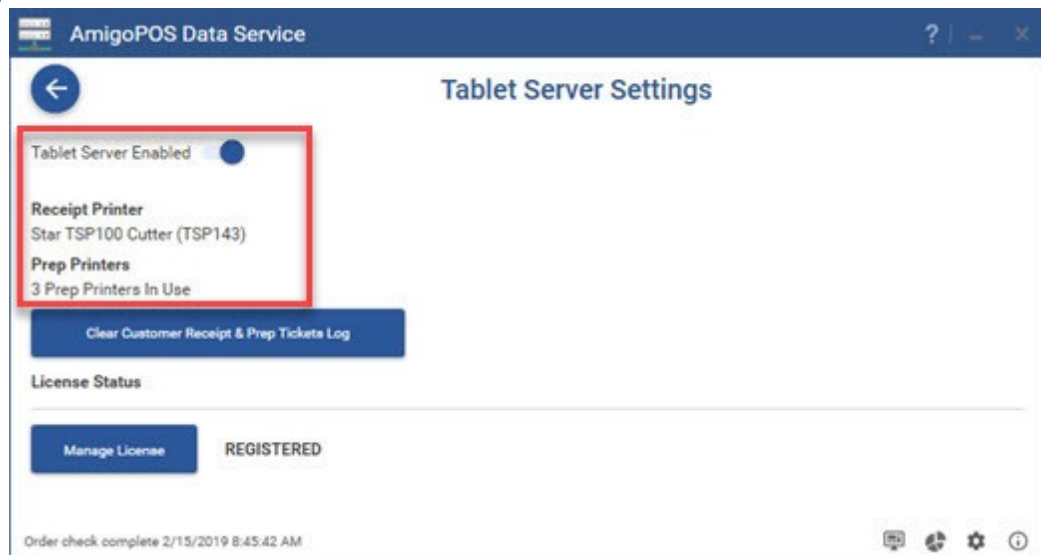


Both the start menu program group and the desktop shortcuts folder contain a shortcut for the tablet pos. Run the tablet pos from either shortcut and click Settings on the data service connection screen.

Click on the Host Name setting, enter the Windows name of the computer where the data service application is running and click Save. Note that the tablet pos does not require a license.

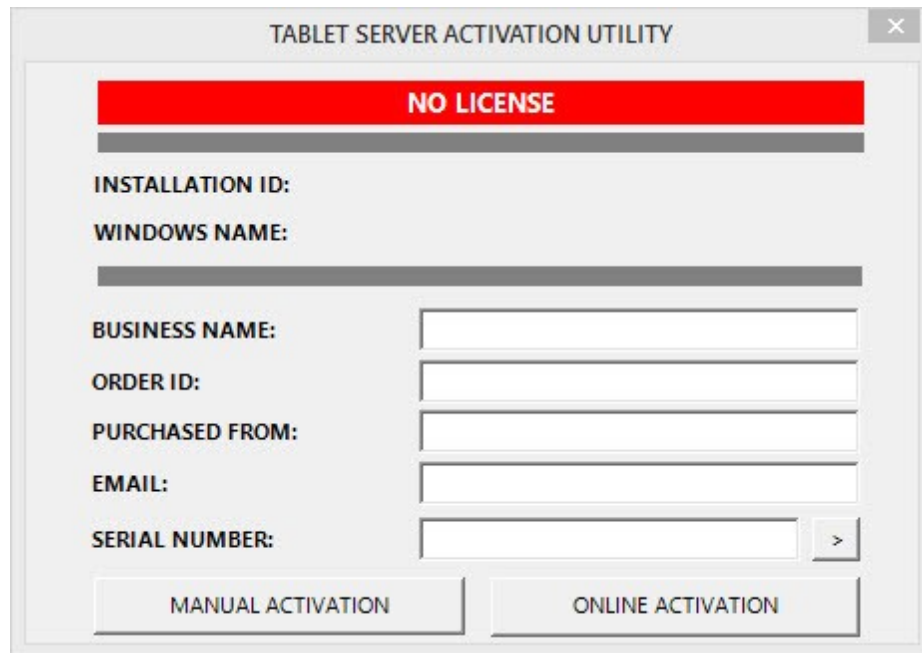


Run the data service application at the main pos station and click Tablet Server settings. Verify that the tablet server is enabled and the [receipt printer](#)⁽³⁸⁵⁾ and the correct number of [prep printers](#)⁽³⁴⁴⁾ are displayed.



Licensing

Click Manage License to run the Activation Utility. If Manage License is not visible, install the activation utility from the link in the order confirmation email and restart the data service application. Refer to the order confirmation email for the order id and submit the license request to receive a serial number. Restart the data service application after the serial number is retrieved to complete the activation.



TABLET SERVER ACTIVATION UTILITY

NO LICENSE

INSTALLATION ID:

WINDOWS NAME:

BUSINESS NAME:

ORDER ID:

PURCHASED FROM:

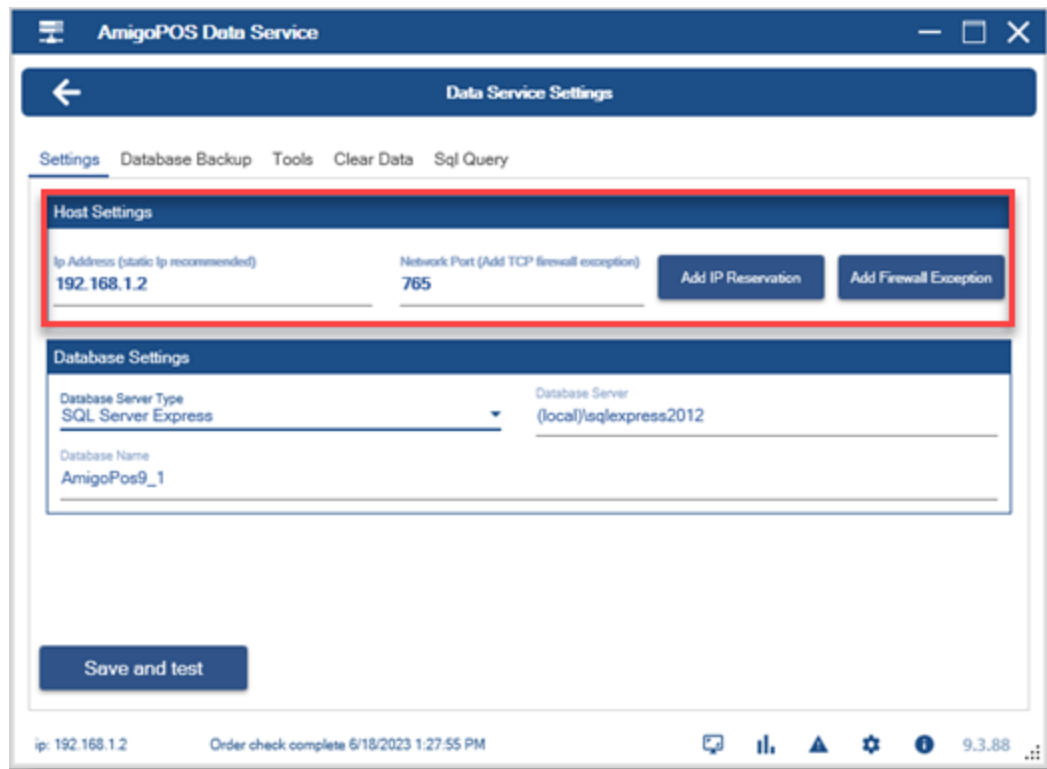
EMAIL:

SERIAL NUMBER: >

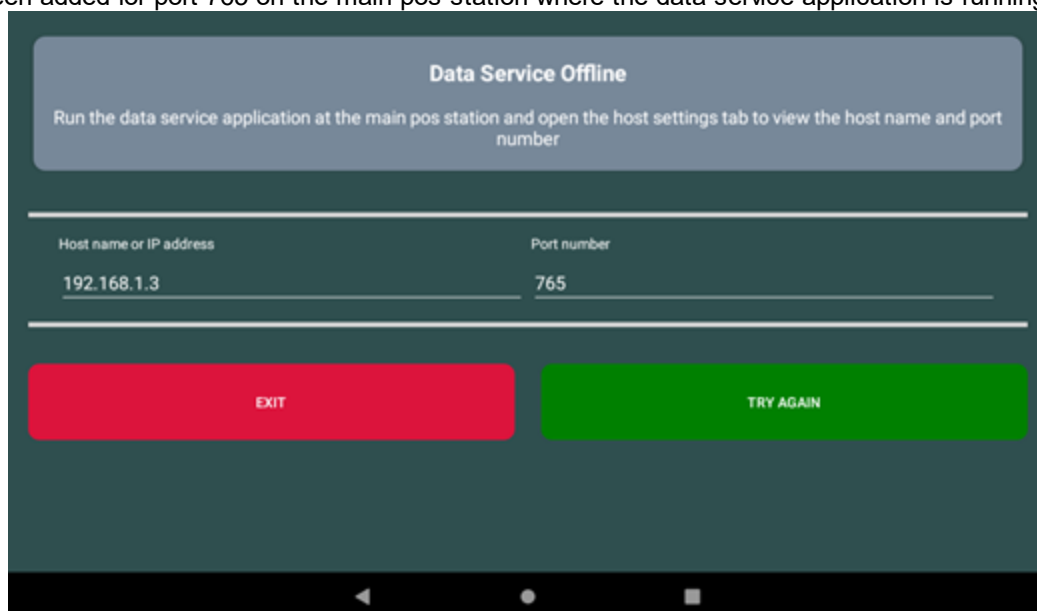
MANUAL ACTIVATION ONLINE ACTIVATION

26.3 Android App Setup

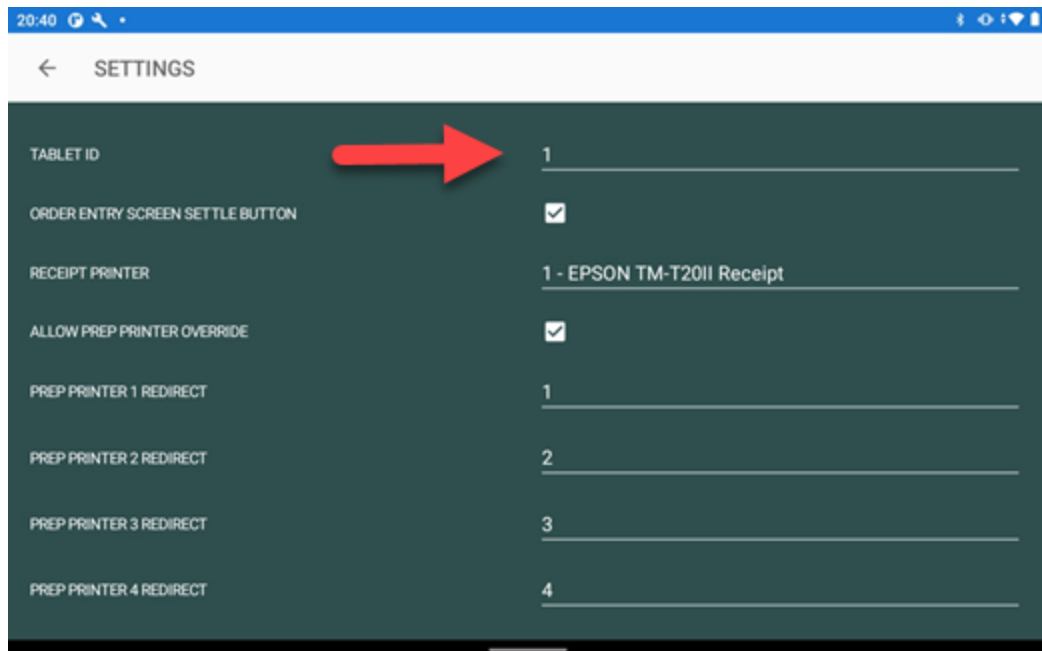
The Android tablet app can be installed on any phone tablet running Android 9 or later. Start the tablet and navigate to Settings | About to verify the Android version. In addition, verify that the Android tablet is connected to the same local network as the pos station where the data service application is running. In the tablet touch the Play Store link and search for the AmigoPOS Mobile Edition app, or open the web browser and navigate to <https://play.google.com/store/apps/details?id=com.amigopos.amigoposmobile>. Open the data service application at the main pos station and click Pos Data Service tab. Note the IP address and port number under Host Settings.



Run the app and wait a few moments for the connection error screen to appear. Enter the IP address address and port number displayed in the data service application and press TRY AGAIN. Allow 30-60 seconds for the connection to reset. If the connection is not successful, verify that the firewall exception has been added for port 765 on the main pos station where the data service application is running.



Assign a unique id to each tablet. As with the station id that is used at pos stations, the tablet id is used for reporting and customer receipts. Press the login screen settings button at the tablet to select the tablet id.

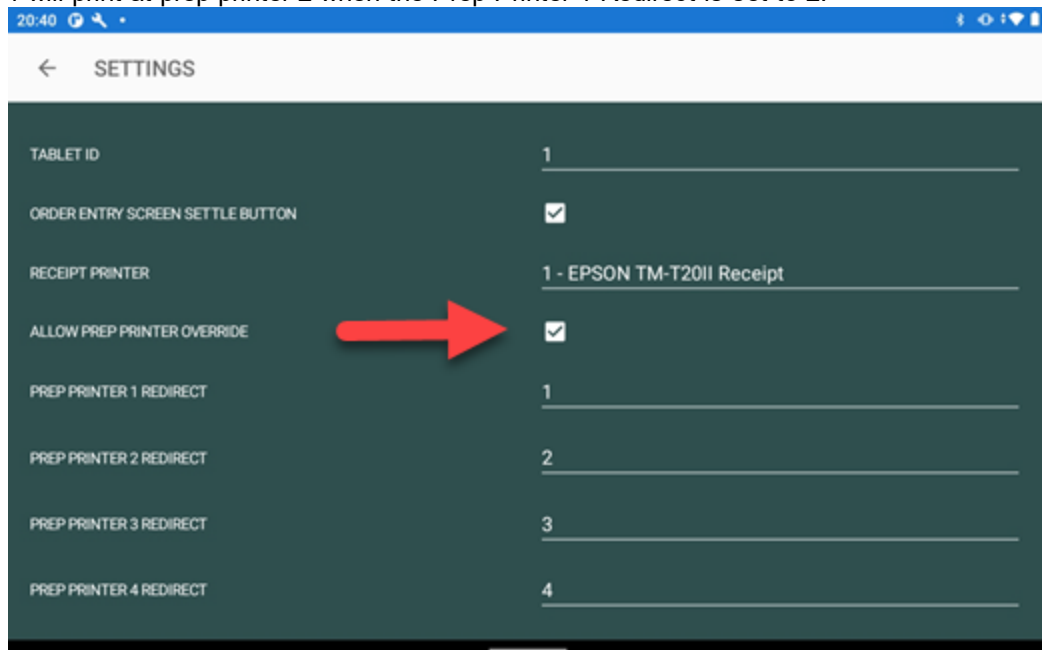


20:40

← SETTINGS

TABLET ID	1
ORDER ENTRY SCREEN SETTLE BUTTON	<input checked="" type="checkbox"/>
RECEIPT PRINTER	1 - EPSON TM-T20II Receipt
ALLOW PREP PRINTER OVERRIDE	<input checked="" type="checkbox"/>
PREP PRINTER 1 REDIRECT	1
PREP PRINTER 2 REDIRECT	2
PREP PRINTER 3 REDIRECT	3
PREP PRINTER 4 REDIRECT	4

The tablet's prep tickets can be mapped to different prep printers. Prep tickets are often redirected for bar menu items so that the prep ticket prints at the closest bar. Press the login screen settings button at the tablet and check the Allow Prep Printer Override box to display the prep printers list. Select the override printer for each prep printer. For example, any menu item that is configured to print to prep printer 1 will print at prep printer 2 when the Prep Printer 1 Redirect is set to 2.

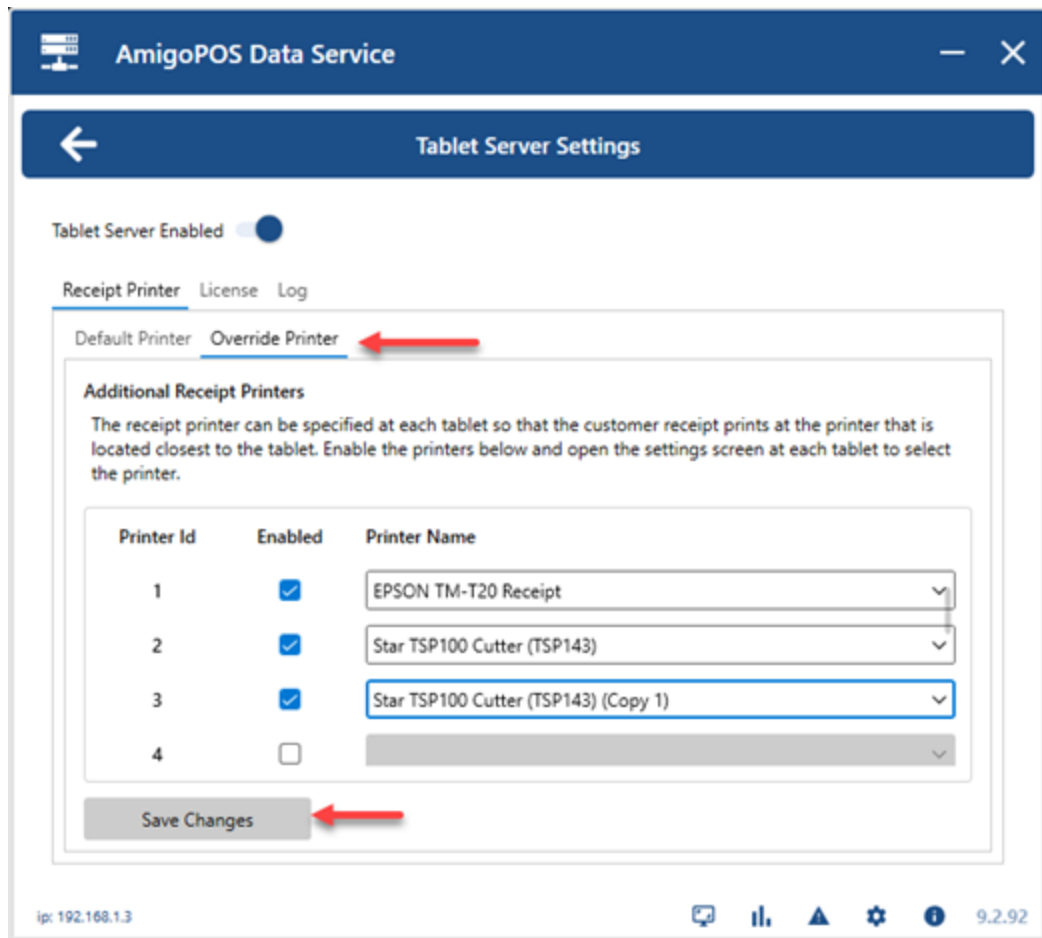


20:40

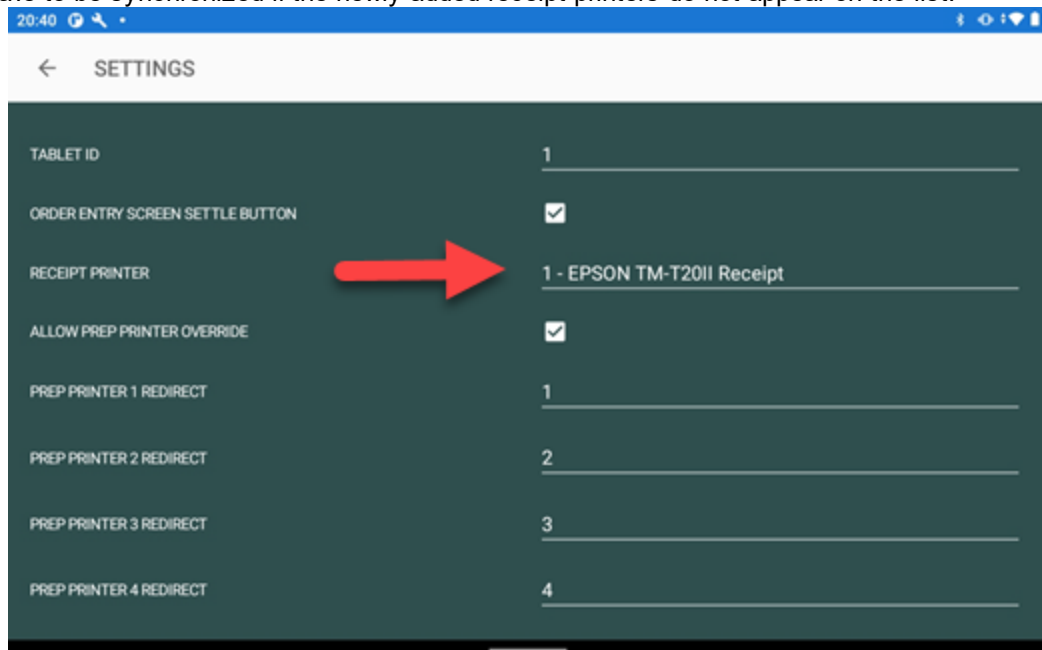
← SETTINGS

TABLET ID	1
ORDER ENTRY SCREEN SETTLE BUTTON	<input checked="" type="checkbox"/>
RECEIPT PRINTER	1 - EPSON TM-T20II Receipt
ALLOW PREP PRINTER OVERRIDE	<input checked="" type="checkbox"/>
PREP PRINTER 1 REDIRECT	1
PREP PRINTER 2 REDIRECT	2
PREP PRINTER 3 REDIRECT	3
PREP PRINTER 4 REDIRECT	4

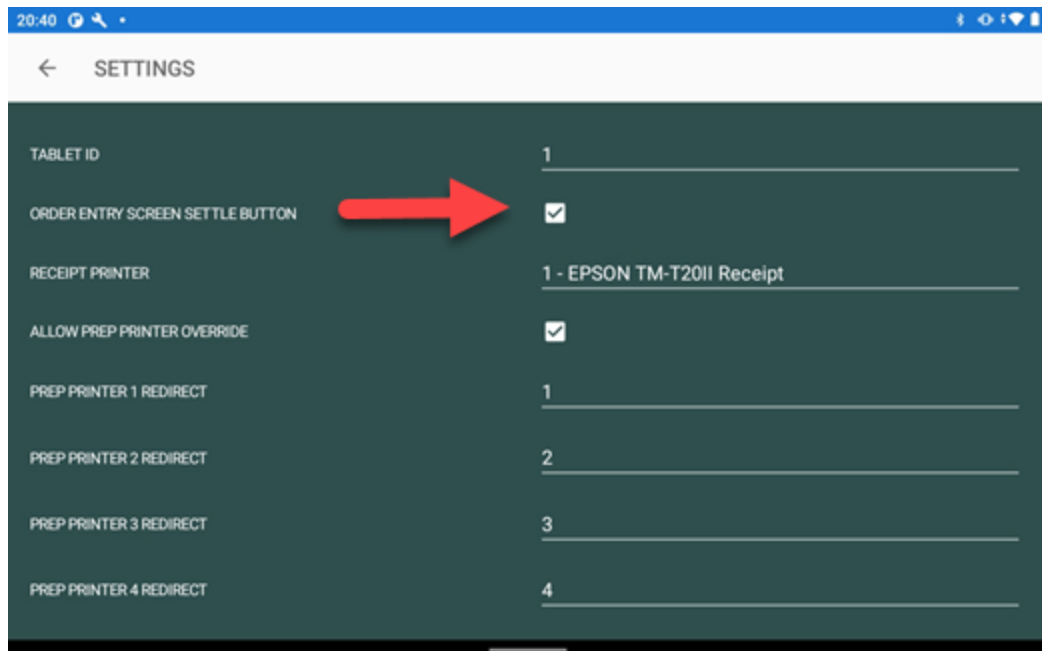
Customer receipts can be redirected to any one of (up to) 10 receipt printers to eliminate the need for the user to retrieve the customer receipt from the main pos station. In large restaurants, wireless receipt printers can be placed in areas where the tablet is used without the need for a pos station. Most manufacturers offer receipt printers with a WiFi interface. Open the data service application tablet server tab and specify the receipt printers.



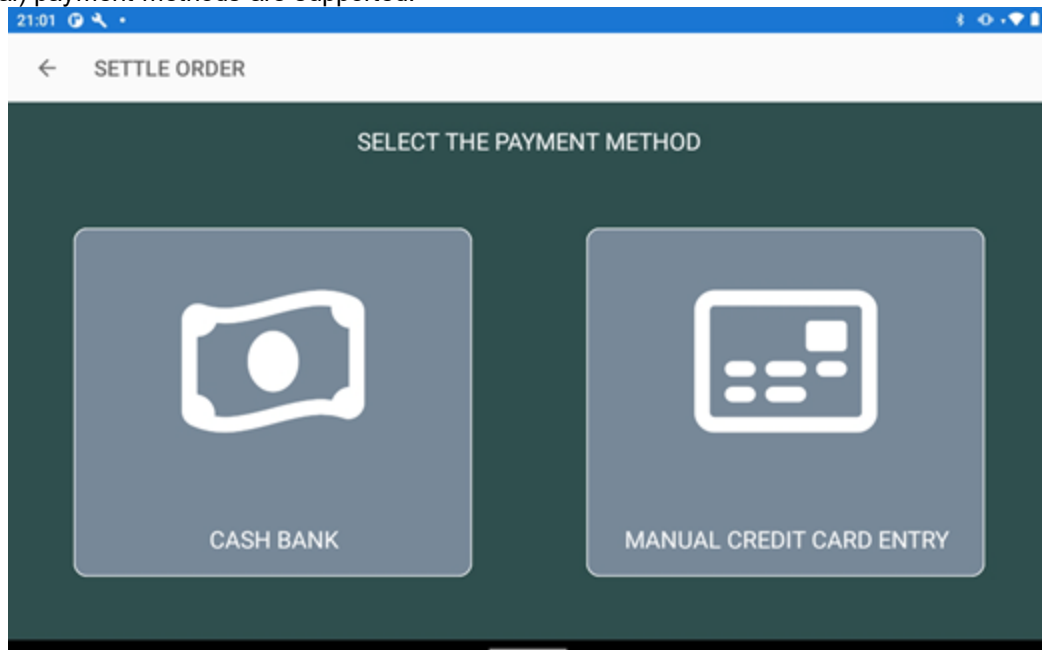
Press the login screen settings button at the tablet and select the receipt printer. Note that the database may have to be synchronized if the newly added receipt printers do not appear on the list.



The order entry screen settle button can be enabled by checking the box on the settings screen.



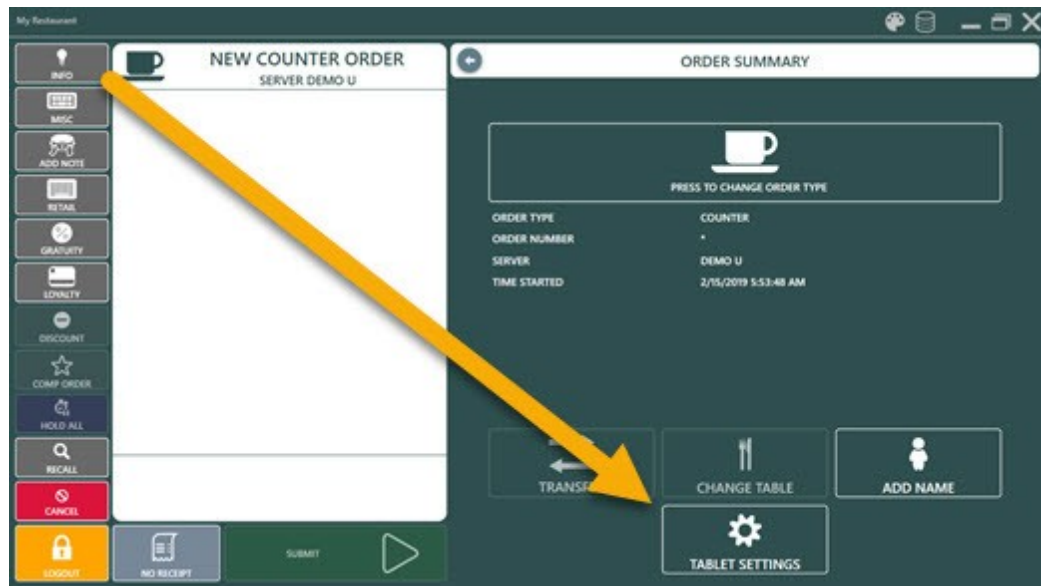
Currently only the cash bank (used for employee banking) and manual credit card (external credit card terminal) payment methods are supported.



26.4 Windows Tablet Settings

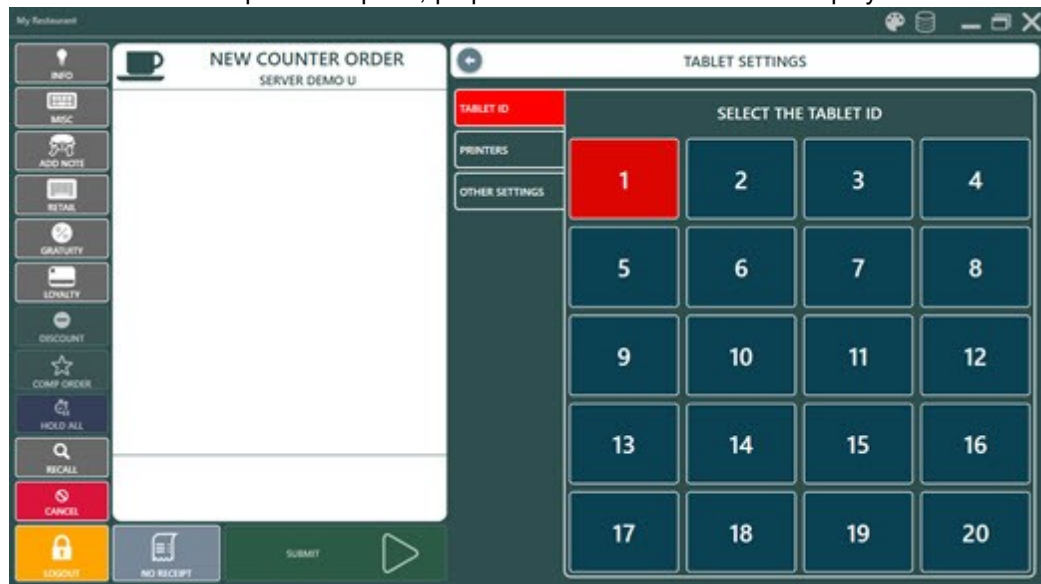
Most settings are shared and stored in the database so that each tablet does not require configuration. The following settings are set at each tablet:

- [Tablet ID](#) ⁶⁴⁰
- [Prep Printer Mapping](#) ⁶⁴⁰
- [Receipt Printer Override](#) ⁶⁴¹
- [Show Only Mandatory Modifiers](#) ⁶⁴¹
- [Start Automatically With Windows](#)



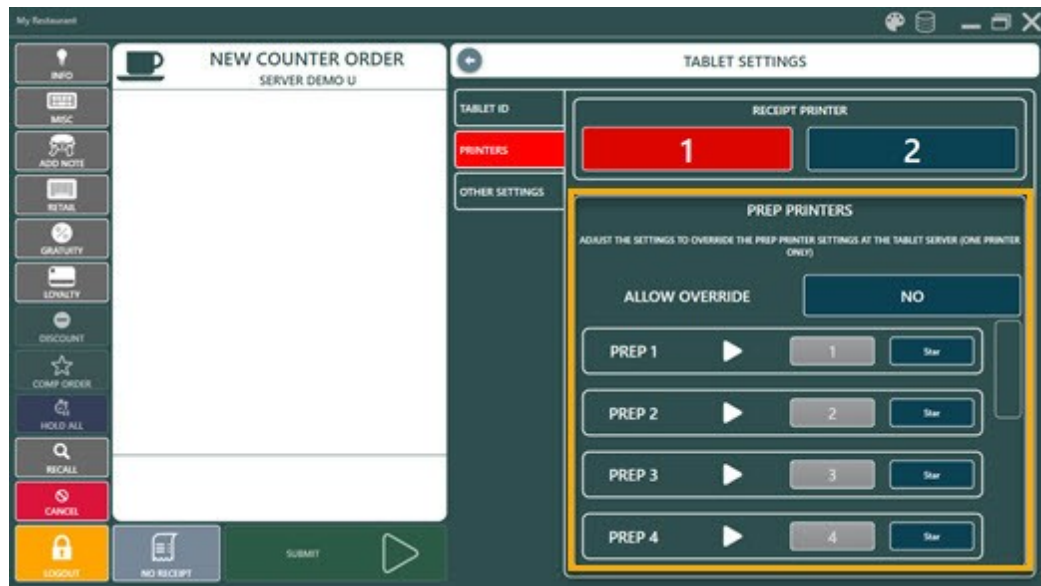
Tablet ID

The tablet identifier used to print on reports, prep tickets and on the remote display.



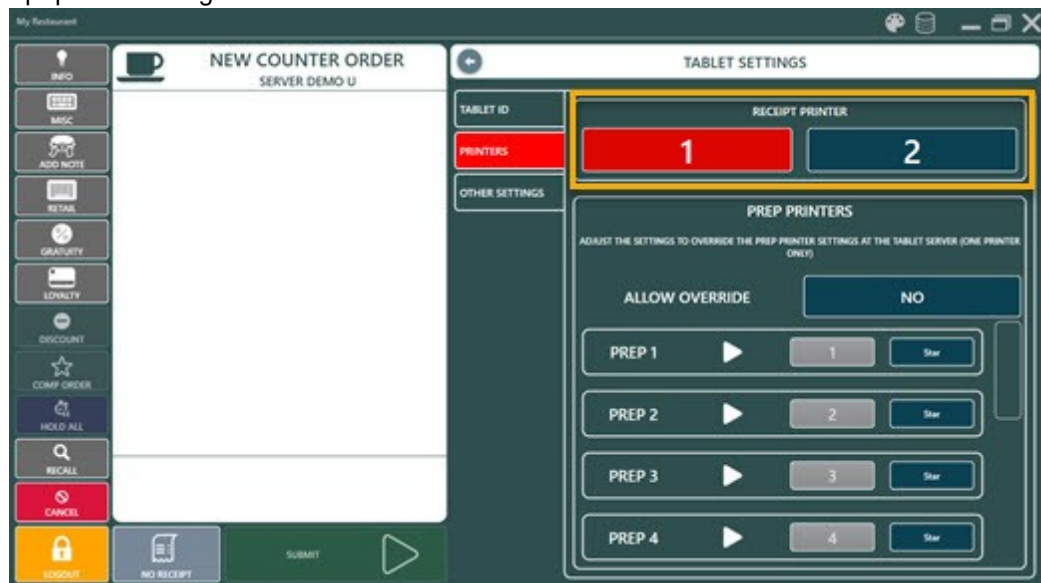
Prep Printer Mapping

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.



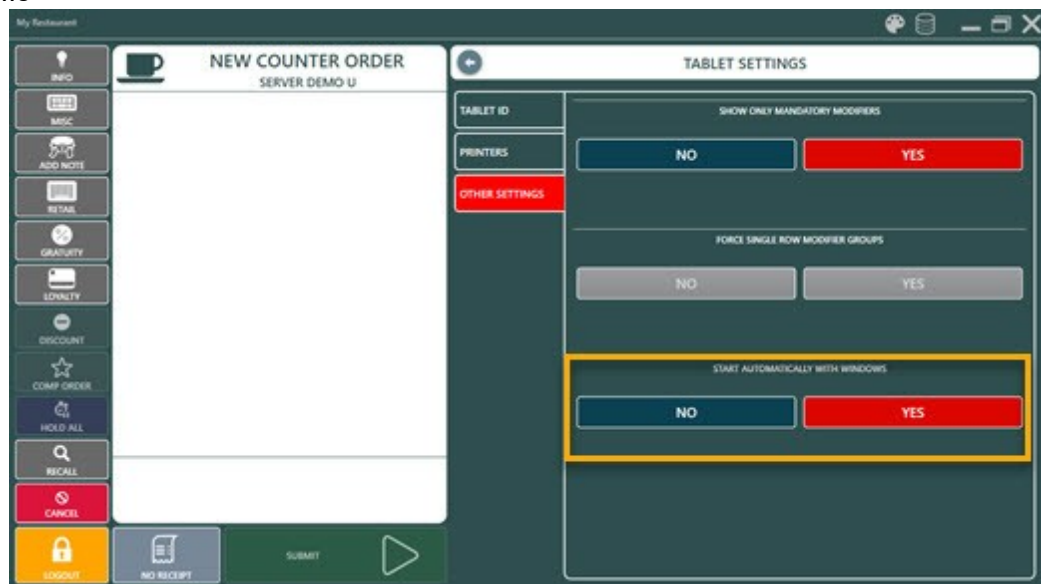
Show Only Mandatory Modifier Groups

For best performance when adding a menu item to the order, modifier groups can be suppressed unless the menu item has mandatory modifier groups. Set Show Only Mandatory Modifiers to Yes to enable this feature.



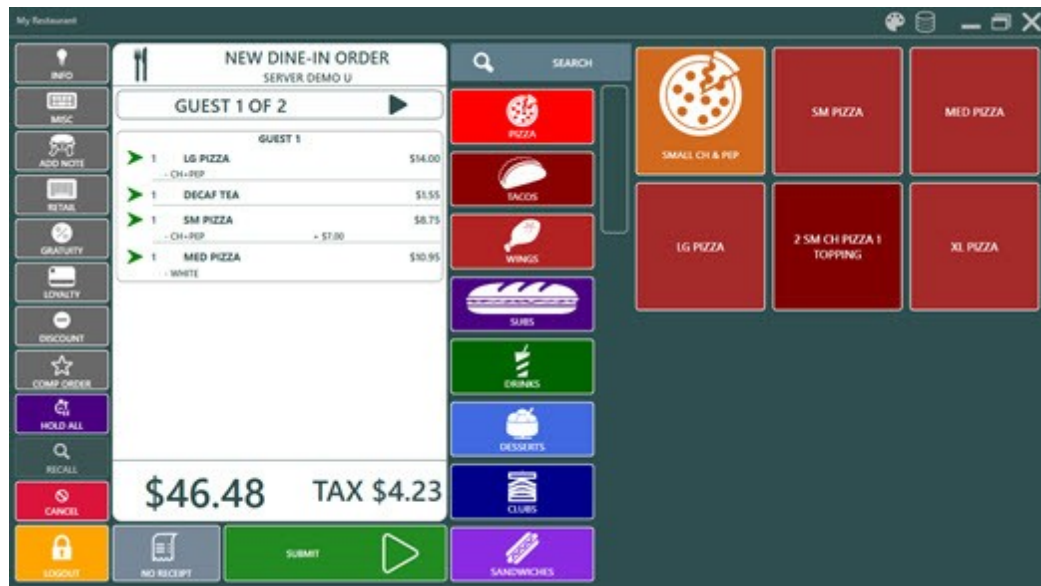
Start Automatically With Windows

Set Start Automatically With Windows to Yes to run the tablet pos automatically when logging in to Windows



26.5 Usage

The tablet user interface order entry procedure is identical to the regular user interface. Customer receipts and prep tickets are printed at the station running the data service application. Note that there may be a slight delay in printing customer receipts and prep tickets. Allow 5-10 seconds depending on the number of tablets in use.

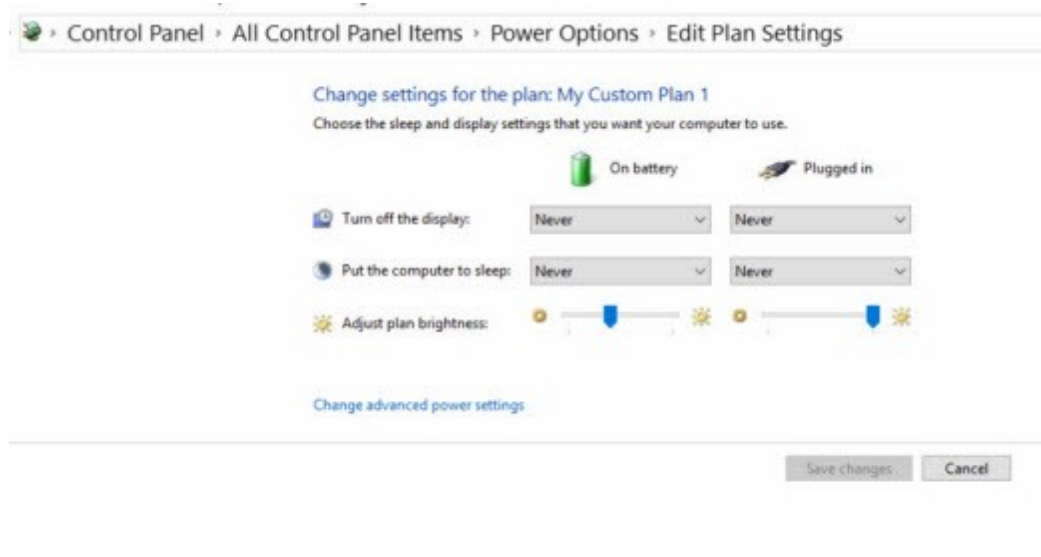
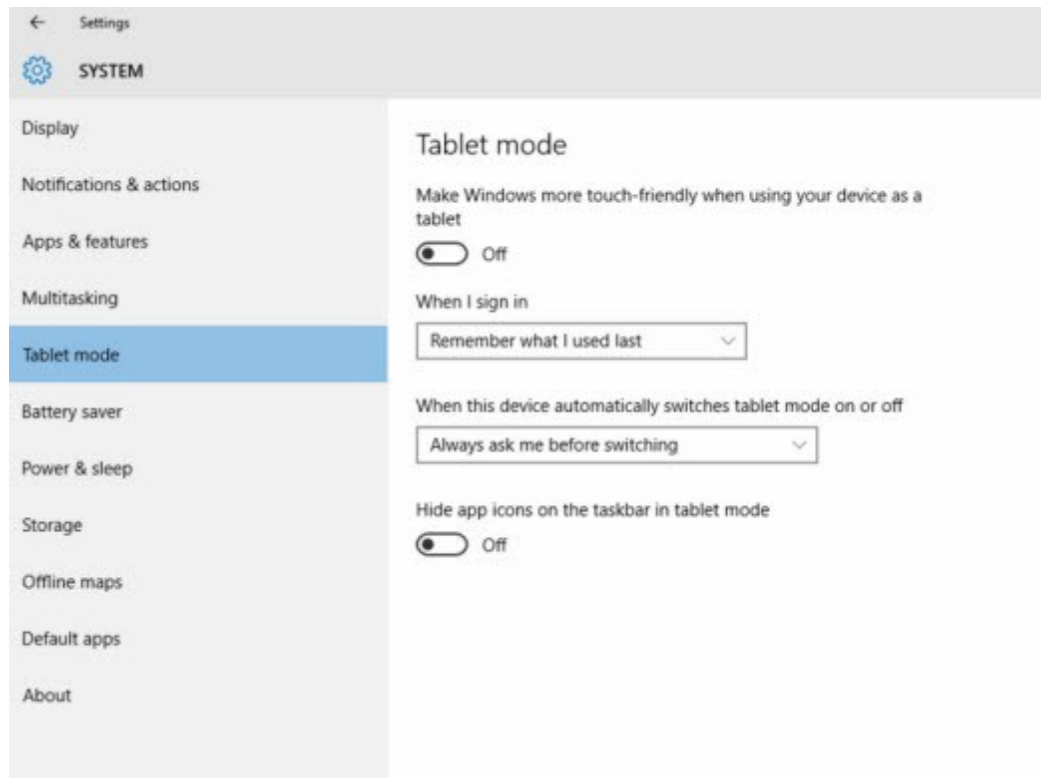


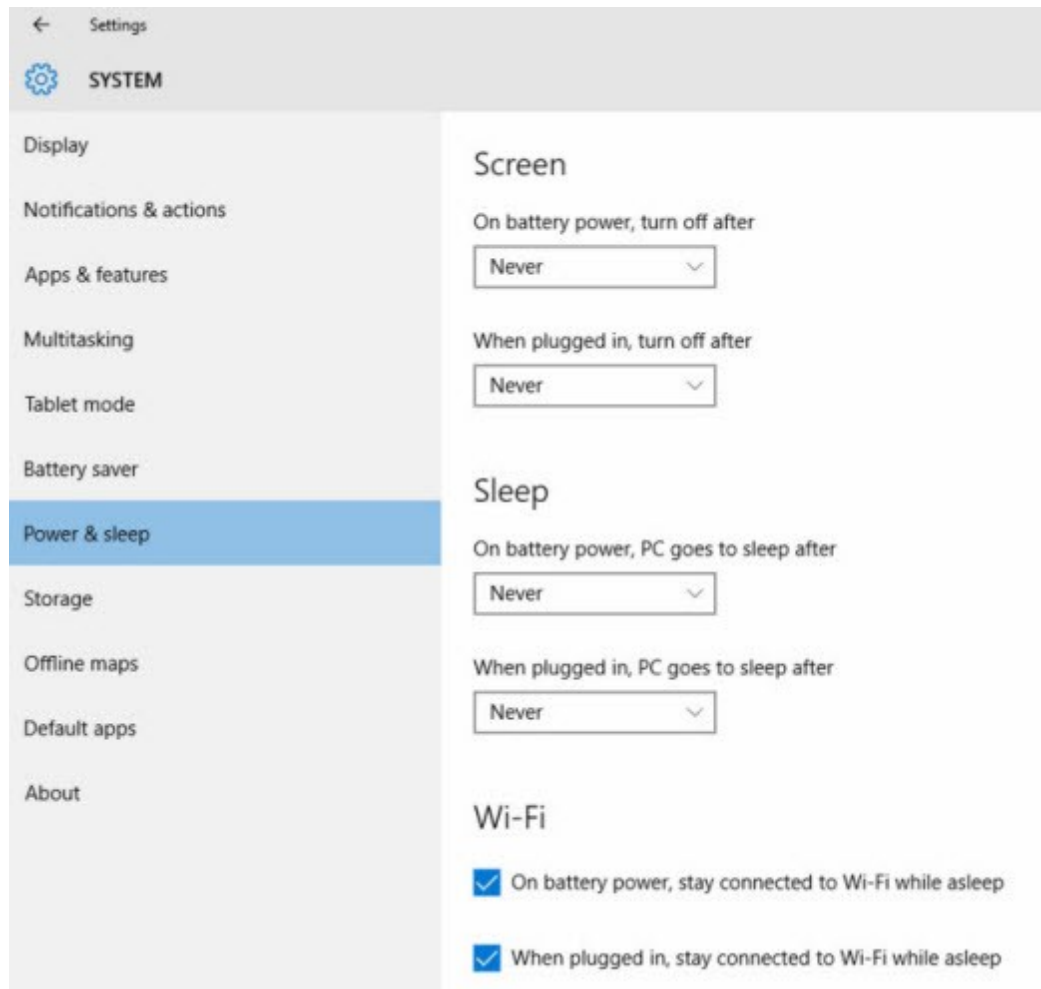
Note that the application periodically checks for an active connection to the data service. If the network connection is disrupted or the data service is offline, the connection dialog will appear, preventing user input until the data service connection is reestablished.



26.6 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.



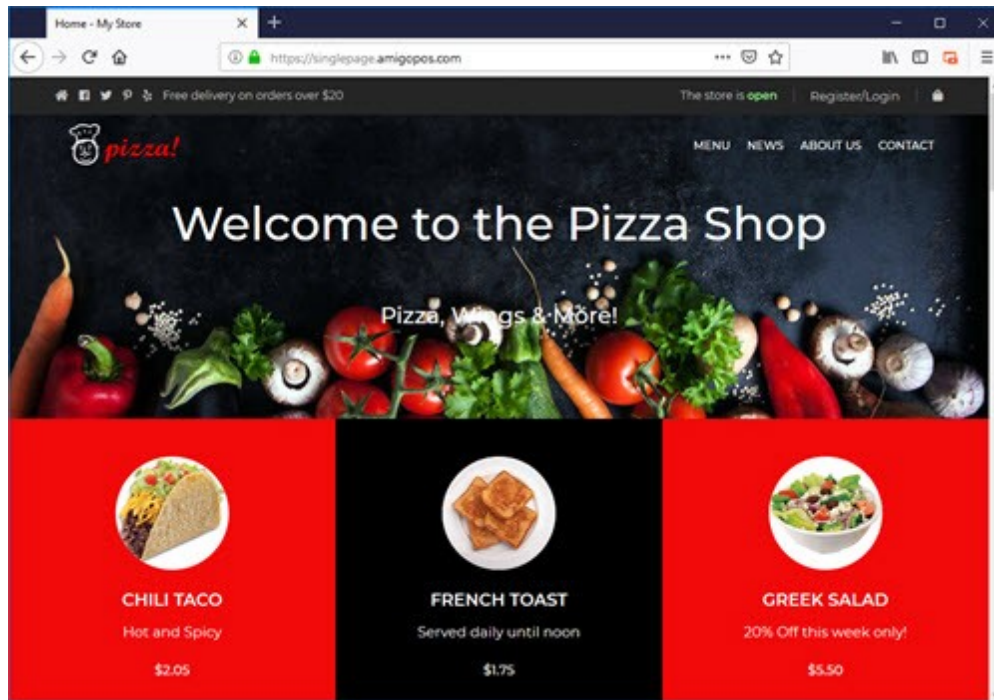


Online Ordering

27 Online Ordering

27.1 Overview

The AmigoPOS online ordering service is a subscription based e-commerce solution based on ASP.Net Core, Web API and Bootstrap 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 using html, css and 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 nameservers for your specific registrar.

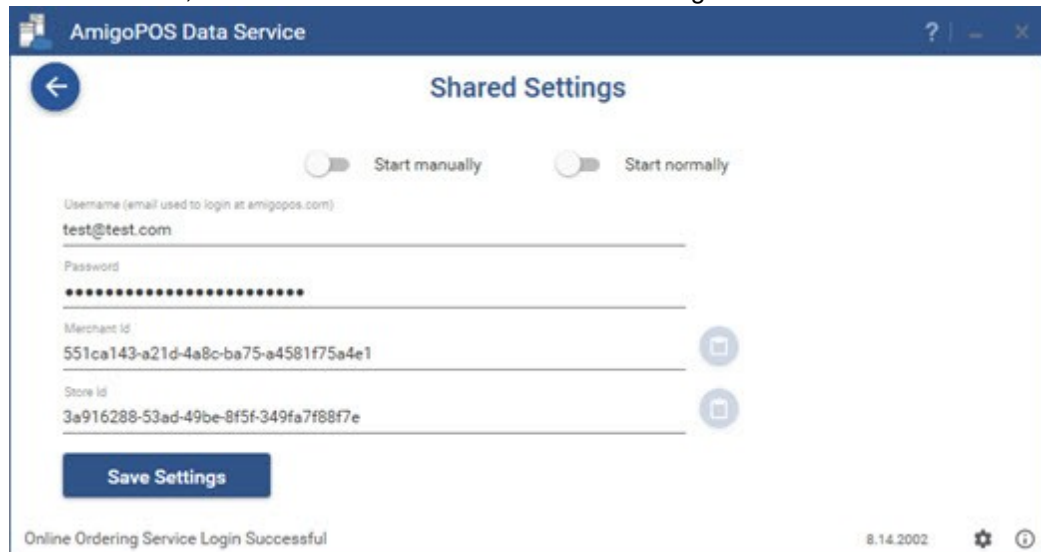
Email

Order confirmation, order update and other notification emails are sent using Microsoft Azure email services and do not require a separate email account.

27.2 Initial Setup

Shared Settings

After receiving the confirmation email, log in at <https://amigopos.com/CloudServices> with your email address and password. Open the data service application and click the settings icon at the bottom right. Enter the same email address and password used to log in to <https://amigopos.com>^[10] followed by the merchant id as displayed under Subscription Settings heading on the cloud services page. Scroll lower on the Cloud Services page to locate the store id for the store that is being configured and enter it in the Store Id field in the data service application. Note that these settings are shared and apply to the enterprise data service, call center cloud service and online ordering service.



The screenshot shows the 'AmigoPOS Data Service' application window with the 'Shared Settings' tab selected. At the top, there are two toggle switches: 'Start manually' (disabled) and 'Start normally' (disabled). Below these are four input fields: 'Username (email used to login at amigopos.com)' with the value 'test@test.com', 'Password' with masked characters, 'Merchant Id' with the value '551ca143-a21d-4a8c-ba75-a4581f75a4e1', and 'Store Id' with the value '3a916288-53ad-49be-8f5f-349fa7f88f7e'. Each of the last three fields has a small square icon to its right. A blue 'Save Settings' button is located at the bottom left of the form area. At the very bottom of the window, a status bar displays 'Online Ordering Service Login Successful' on the left, the version '8.14.2002' in the center, and a settings gear icon on the right.

The screenshot shows the AmigoPOS web interface. At the top, there's a navigation bar with 'REST@TEST.COM', 'LOG OFF', and a Twitter icon. Below this is the 'AmigoPOS. Restaurant Point Of Sale' header. A menu bar includes 'FEATURES', 'DOWNLOAD', 'CONTACT', 'SUPPORT', 'CLOUD SERVICES' (highlighted in yellow), 'PURCHASE', and 'COMING SOON'. The main content area is divided into two sections: 'Subscription Settings' and 'Store Settings'. The 'Subscription Settings' section contains a table with fields like Merchant Id, Username, Business Name, Contact, Start Date, Trial Expires, Gift/Loyalty Cards, Gift/Loyalty Cards Cost, Enterprise Data, Enterprise Data Cost, Online Ordering Stores, and Online Ordering Cost Each. The 'Store Settings' section contains fields for Store Name, Store Id, Internal Host Name, and another Internal Host Name.

Subscription Settings	
Merchant Id	7f64997b-5451-44f1-b695-11c346d1a2de
Username	test@test.com
Business Name	ABC Food Service
Contact	Joe User
Start Date	11/30/2018
Trial Expires	11/30/2018
Gift/Loyalty Cards	True
Gift/Loyalty Cards Cost	\$20.00 USD
Enterprise Data	True
Enterprise Data Cost	\$100.00 USD
Online Ordering Stores	1
Online Ordering Cost Each	\$60.00 USD

Store Settings	
Store Name	Single Page Demo Store
Store Id	2f93e355-1163-4a1c-b40c-8cf9e27d893b
Internal Host Name	singlepage.localhost.com
Internal Host Name	singlepage.localhost.com

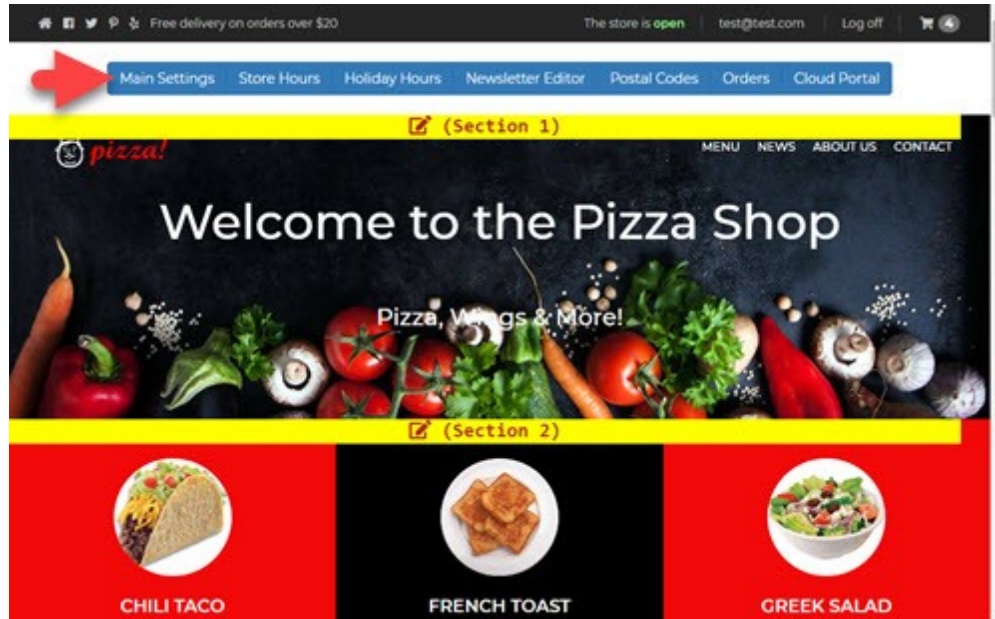
Online Ordering Settings

In the data service application and click the settings button on the Online Ordering tile. Enable the online ordering service and enter the service url displayed in the cloud services page. 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. AmigoPOS 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. Click **Save & Test** to verify the settings.

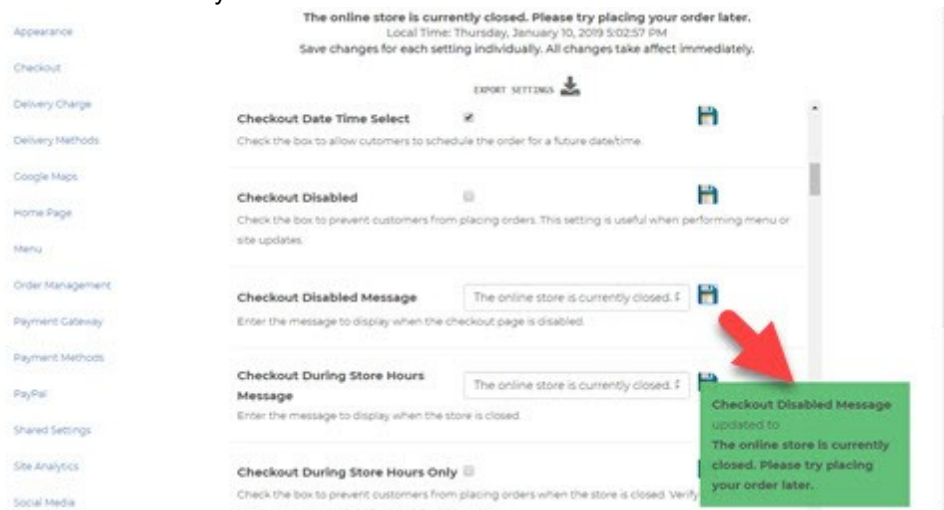
The screenshot shows the AmigoPOS Data Service application window. The title bar says 'AmigoPOS Data Service'. The main window has a header 'Online Ordering Settings' and a sidebar with 'Settings' and 'Log'. The 'Settings' section includes a toggle for 'Online Ordering Service Enabled' (which is turned on), a 'Service Url' field with the value 'https://test.amigopos.com', a 'New Order User' dropdown menu with 'DEMO USER' selected, and a 'Default Web Delivery Zone' dropdown menu with 'Web Order' selected. At the bottom, there are two buttons: 'Save & Test' and 'Update Menu'. A footer message says 'Online Ordering Service Login Successful' and the date '8.14.2002' is displayed.

27.3 Site Settings

Site settings are available by logging in to the portal with manager credentials and clicking **Main Settings**.



Save changes for each setting individually by clicking the Save icon at the right of each setting. All changes take affect immediately.



The following settings can be modified to customize the web site according to your requirements.

- [Administrative](#) ⁶⁵²
- [Appearance](#) ⁶⁵²
- [Checkout](#) ⁶⁵²
- [Delivery Charge](#) ⁶⁵³
- [Delivery Methods](#) ⁶⁵³

- [Menu](#) ⁶⁵³
- [Order Management](#) ⁶⁵¹
- [Payment Gateway](#) ⁶⁵³
- [Payment Methods](#) ⁶⁵³
- [PayPal](#) ⁶⁵⁴
- [Shared Settings](#) ⁶⁵⁴
- [Site Analytics](#) ⁶⁵⁴
- [Social Media](#) ⁶⁵⁴

Administrative

Contact Name: Enter the person that receives alerts related to online ordering and system errors.

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.

Email Address: Email address where alerts (such as late orders or system errors) 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 (currently 5 minutes).

From Email: Reply-to email address used in customer emails.

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.

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.

Time Offset: The difference between the local time and UTC.

Vat Tax: Check the box to specify whether or not Vat tax is enabled.

Appearance

Shortcut Icon: Upload the icon that should appear in the browser tab. The icon should be square and either png or ico format. Refer to <https://realfavicongenerator.net> to create an icon using your logo.

Site Theme: Enter the color to use throughout the site. Valid options are blue, dark-green, green, navy, orange and red.

Store Logo: Upload the logo that appears in the page header and footer as well as any emails. The logo should be a png or gif file with a transparent background. The recommended dimensions are 175px width and 60px height.

Checkout

Checkout Date Time Maximum: Select the maximum number of days to enable on the calendar. For example, set to 7 to allow orders to be placed up to one week in advance.

Checkout Date Time Select: Check the box to allow customers to schedule the order for a future date/time.

Checkout Disabled: Check the box to prevent customers from placing orders. This setting is useful when performing menu or site updates.

Checkout Disabled Message: Enter the message to display when the checkout page is disabled.

Checkout During Store Hours Message: Enter the message to display when the store is closed.

Checkout During Store Hours Only: Check the box to prevent customers from placing orders when the store is closed. Verify that the store hours are set correctly before enabling this setting.

Coupon Box: Check the box to display the coupon box on the shopping cart and checkout pages. This feature is currently in development.

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.

Delivery Charge

Delivery Charge: Enter the numeric delivery charge without the currency symbol.

Delivery Charge Based On Postal Code: Check the box to charge for deliveries based on zip/postal code. Un-tick the box to charge the standard delivery fee.

Delivery Distance Limit: Enter the maximum distance allowed for deliveries. The value is either miles or kilometers, based on the 'Google Maps Units' setting. Enter 0 to allow all deliveries regardless of distance.

Delivery Minimum: Enter the minimum order total (without the currency symbol) required for deliveries. Set to zero to allow deliveries for any order.

Delivery Minimum Free: Enter the minimum order total (without the currency symbol) for free deliveries. Set to zero to apply the delivery charge to all orders.

Delivery Methods

Curbside Pickup Enabled: Check the box to display the Curbside Pickup order type on the checkout page. The customer will be prompted to enter the car make/color for easy identification.

Delivery Enabled: Check the box to display the Delivery order type on the checkout page.

Dine In Enabled: Check the box to display the Dine In order type on the checkout page.

Store Pickup Enabled: Check the box to display the Store Pickup order type on the checkout page.

Menu

Menu Categories Order By Button Position: Check the box to order menu categories by the button position set in AmigoPOS back office. Uncheck the box to order alphabetically.

Menu Items Order By Button Position: Check the box to order menu items by the button position set in AmigoPOS back office. Uncheck the box to order alphabetically.

Modifiers Order By Button Position: Check the box to order modifiers by the button position set in AmigoPOS back office. Uncheck the box to order alphabetically.

Payment Gateway

Credit Card Business Name: Enter the business name as it should appear on the credit card or PayPal transaction description.

Gateway Country Code: Enter the country code used to process payment gateway 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.

Payment Methods

Pay At Delivery Enabled: Check the box to display the Pay At Delivery payment method on the checkout page.

Pay In Store Enabled: Check the box to display the Pay In-Store payment method on the checkout page.

PayPal Payment Enabled: Check the box to display the PayPal payment method on the checkout page.

PayPal

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 Use Sandbox: Set to Yes to use the PayPal Sandbox for initial setup and testing.

Shared Settings

Display Name: Enter the store name as it should appear on the web page title and reports

Meta Description: Enter a description of your business that search engines use to describe the link in the search results.

Meta Keywords: Enter keywords separated by commas that describe the business, menu, location, etc so that search engines display your site when a user searches using similar words.

Site Analytics

Google Analytics Tracking ID: Enter the Google Analytics tracking id that was provided when the Google Analytics account was created, i.e. UA-12345678-9. Leave blank if Google Analytics is not used.

Google Maps Travel Mode: Select the travel mode to use when calculating the distance from the store to the delivery address.

Google Maps Units: Select the unit of measure to use when calculating the distance from the store to the delivery address.

StatCounter Project Identifier: Enter the StatCounter project id that is displayed next to 'var sc_project' in the default installation code. Leave blank if StatCounter is not used.

StatCounter Security Code: Enter the StatCounter security code that is displayed next to 'var sc_security' in the default installation code. Leave blank if StatCounter is not used.

Social Media

Facebook Link: Enter the Facebook URL for the link displayed in the page footer. Leave blank to omit the Facebook link.

LinkedIn Link: Enter the LinkedIn URL for the link displayed in the page footer. Leave blank to omit the LinkedIn link.

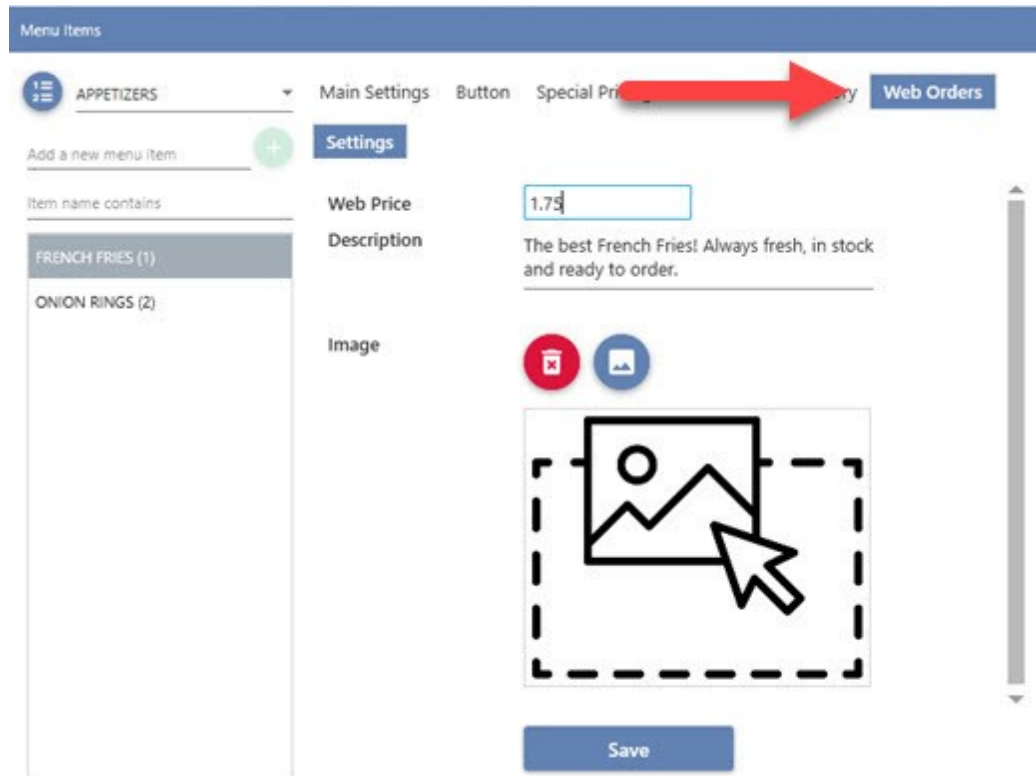
Pinterest Link: Enter the Pinterest URL for the link displayed in the page footer. Leave blank to omit the Pinterest link.

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.

27.4 Menu Setup

Online ordering is currently available for regular menu items only. Open the menu item editor and select any regular menu item. Click the Web Orders tab to display the settings that are used for online ordering.



The following settings are available for each regular menu item:

- **Web Price:** Each menu item must be assigned a price specifically for online ordering
- **Description:** The description that appears on the product details page
- **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. Do not use images large than 150kb or significant page load delays will occur.

27.5 Html Content

Important: Verify that you own the rights to any images that are uploaded to your web portal. Failure to do so will result in the suspension of your portal.

The home page includes 5 sections that can be customized or hidden according to your requirements. Each section includes a link in the navigation bar that can be suppressed. Login to your portal with manager credentials and click the main settings tab to enable/disable each of the 5 sections. Note that the menu section cannot be suppressed and appears immediately after section 2.

Main Settings | Store Hours | Holiday Hours | Newsletter Editor | Postal Codes | Orders | Cloud Portal

Store Settings

Local Time: Saturday, January 19, 2019 9:33:05 PM
Save changes for each setting individually. All changes take affect immediately.

EXPORT SETTINGS

- All Settings
- Administrative
- Appearance
- Checkout
- Delivery Charge
- Delivery Methods
- Google Maps
- Home Page**
- Menu
- Order Management
- Payment Gateway
- Payment Methods
- PayPal
- Shared Settings

Home Page Section 1
Enter the title of the home page section 1 link. Leave blank to hide the section 1 menu item.

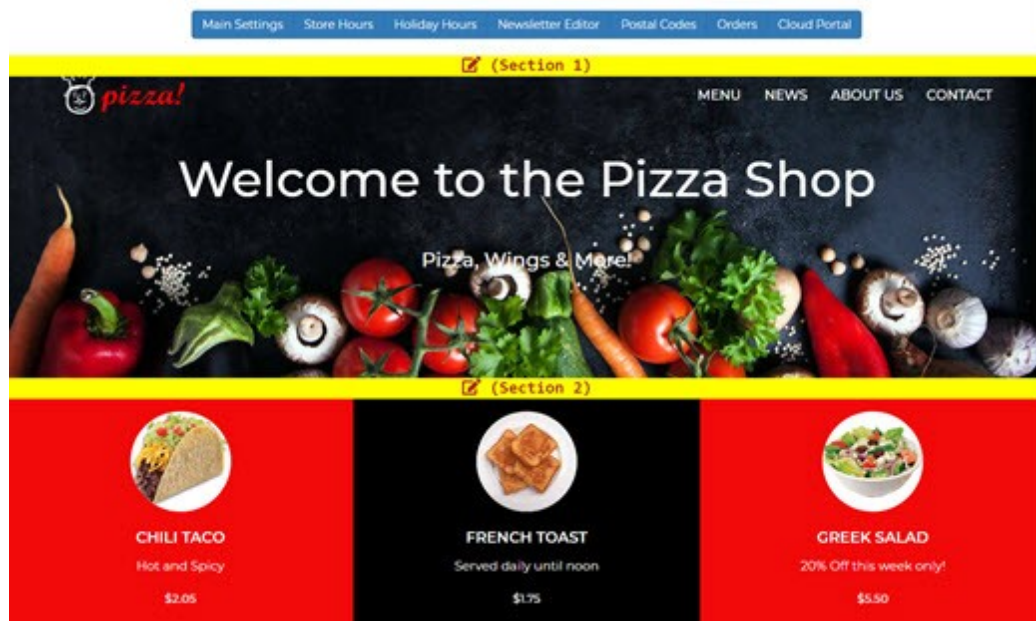
Home Page Section 2
Enter the title of the home page section 1 link. Leave blank to hide the section 2 menu item.

Home Page Section 3 News
Enter the title of the home page section 1 link. Leave blank to hide the section 3 menu item.

Home Page Section 4 About Us
Enter the title of the home page section 1 link. Leave blank to hide the section 4 menu item.

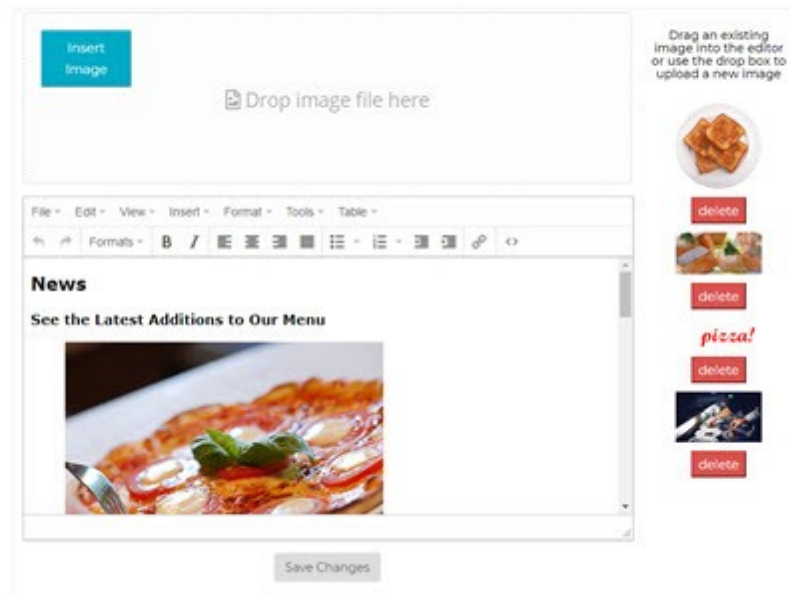
Home Page Section 5 Contact
Enter the title of the home page section 1 link. Leave blank to hide the section 5 menu item.

Click on the yellow horizontal bar at the top of a section to edit the html content. Note that you must log in with manager credentials to edit the html content.

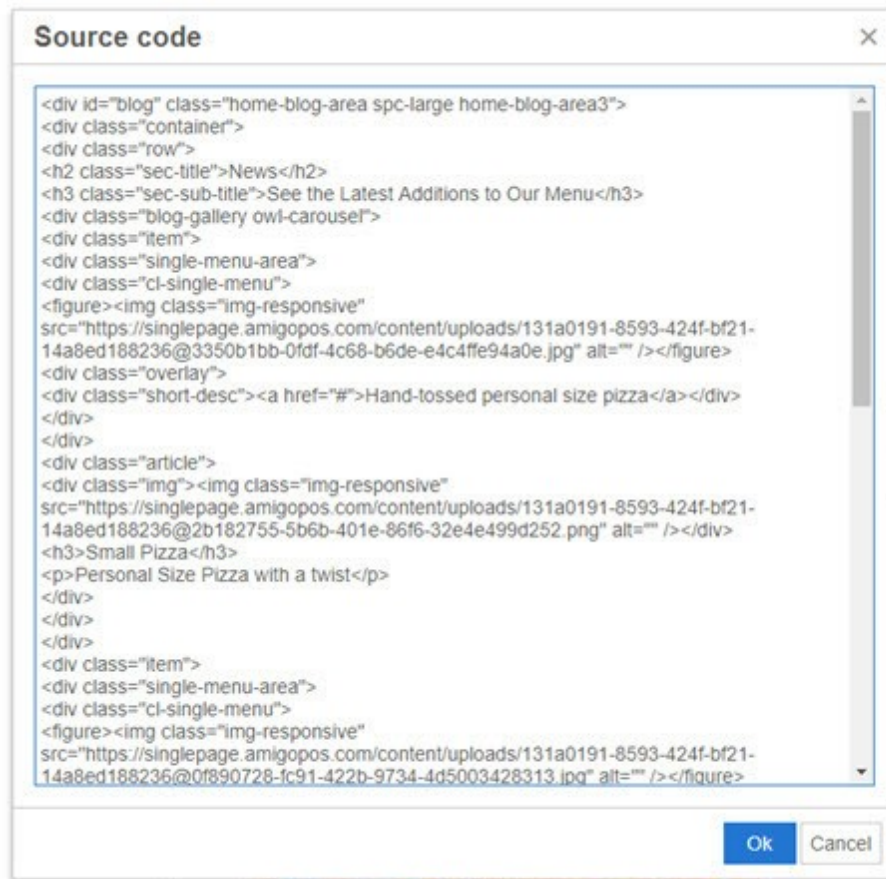


The html editor includes a intuitive toolbar that contains most common text formatting functions.

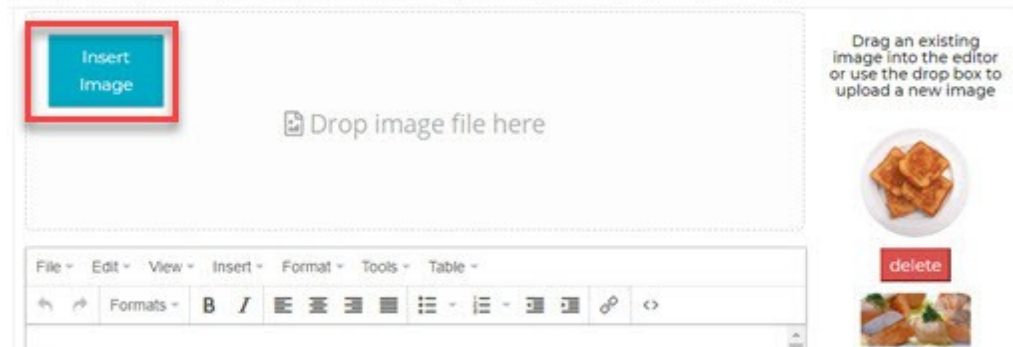
HTML Editor



The html markup can be edited by clicking the source code < | button at the right.



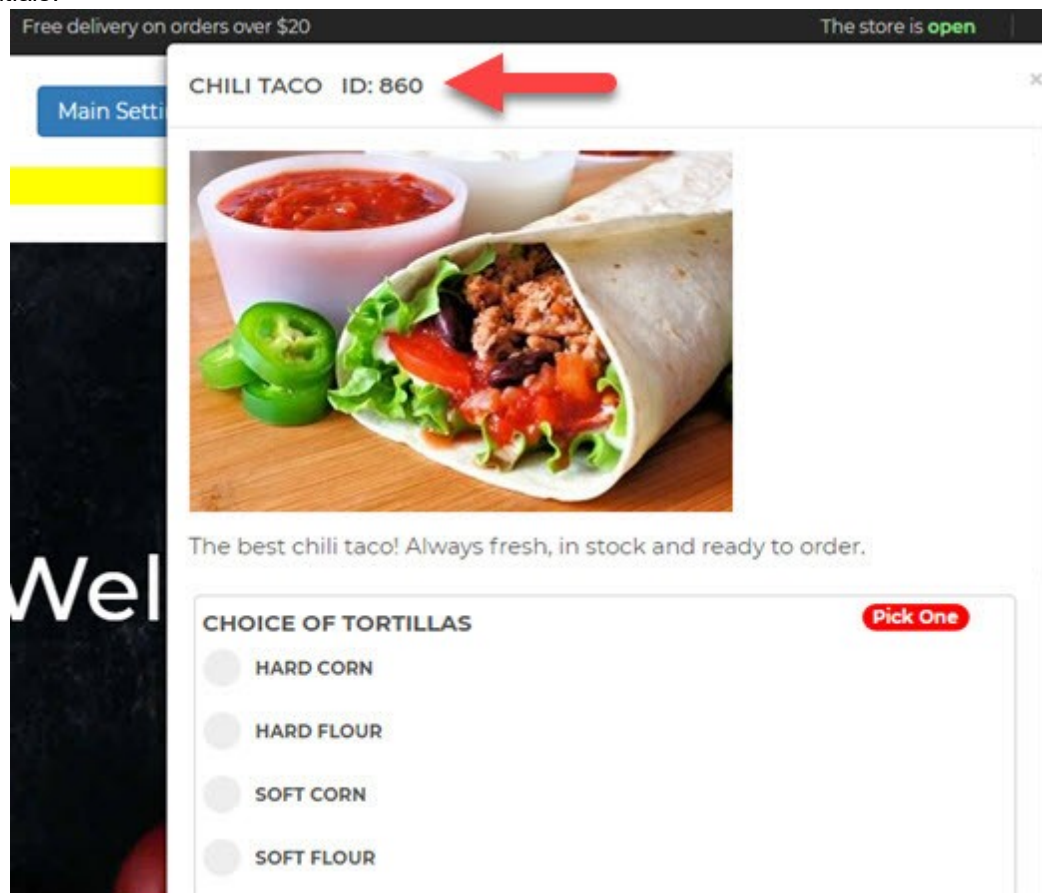
Images can be uploaded either by dragging an image into the drop area or by clicking Insert Image to browse for an image. Previously uploaded images are listed at the right and can be reused in multiple sections by dragging the image into the editor.



In order to create a hyperlink to a menu item so that the popup window is displayed when the link is clicked, add the **btn-action** class and surround the item id with the menuitem tag. For example, to create a link to menu item 860, use the following html:

```
<a class="btn-action" style="display:block;cursor:pointer;" <menuitem>860</menuitem>> burger & fries </a>
```

Note that the menu item id is displayed at the top of the popup windows after logging in with manager credentials.



27.6 Payment Methods

27.6.1 Overview

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.

27.6.2 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.

Gateway Country Code	<input type="text" value="US"/>	
Enter the country code used to process PayPal transactions.		
Gateway Merchant Login	<input type="text" value="cnpdev1047"/>	
Enter the merchant login provided in the gateway signup confirmation email.		
Gateway Merchant Password	<input type="password" value="....."/>	
Enter the payment gateway password provided in the gateway signup confirmation email.		
Gateway Type	<input type="text" value="1"/>	
Select the credit card processor's payment gateway.		
Gateway URL	<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](#)
[Little Online Gateway](#)
[JetPay Gateway](#)
[HSBC XML API](#) (ClearCommerce Engine)
[BluePay 2.0 Post](#)
[PayTrace Payment Gateway](#)
[TransNational Bankcard](#)
[First Data Global Gateway E4](#)
[Bluefin](#)
[Payscape](#)

27.7 Coupons

The coupons function will be available in the first quarter of 2019.

Order Management

28 Order Management

28.1 Order Entry Screen

28.1.1 Overview

The order entry screen consists of 3 main sections, the guest check, menu categories and menu items. Each section can be fully customized to suit the needs of the business. Select a topic below to begin customizing the order entry screen.

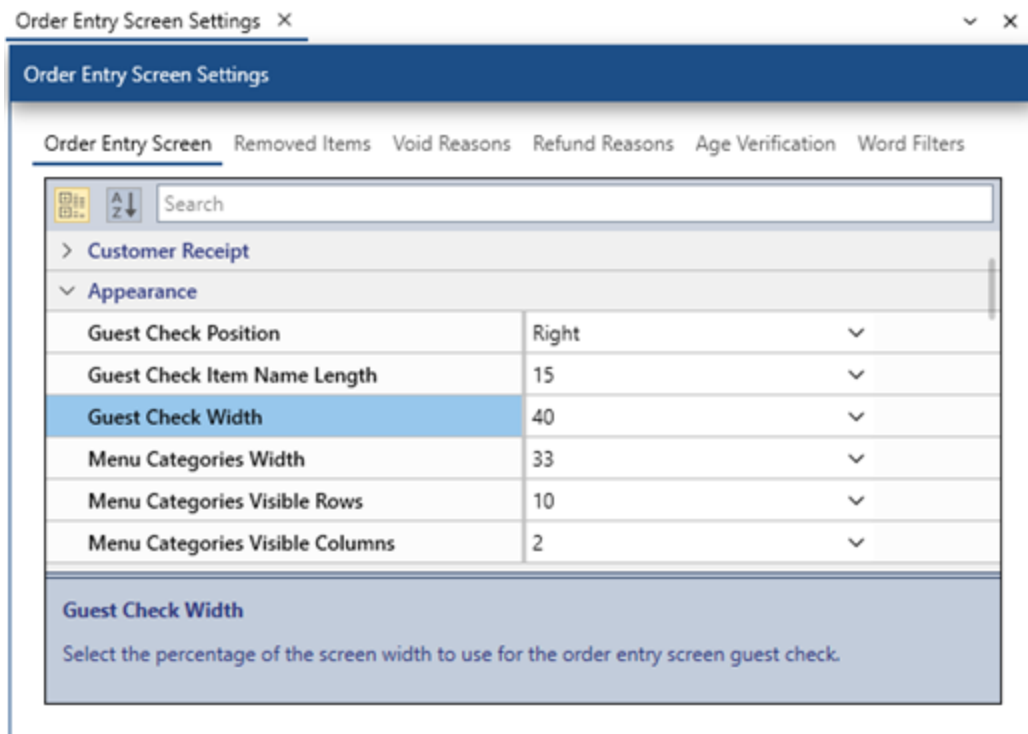
1. [Screen Layout](#) ⁶⁶²
2. [Guest Check](#) ⁶⁶³
3. [Menu Categories](#) ⁶⁶⁶
4. [Menu Items](#)



28.1.2 Screen Layout

Screen Layout

The percentage of the screen width used by each section can be set in back office | settings | main settings | order entry screen. Expand the Appearance group and select the value for the Guest Check Width and Menu Categories Width.



In the image below, the guest check section is set to use 40% of the screen width and the menu category section uses 33% of the screen width. The remaining 27% is used by the menu items section.



28.1.3 Guest Check

Guest Check

The guest check section consists of the order option buttons at the right, the submit and payment buttons at the bottom and the guest check.

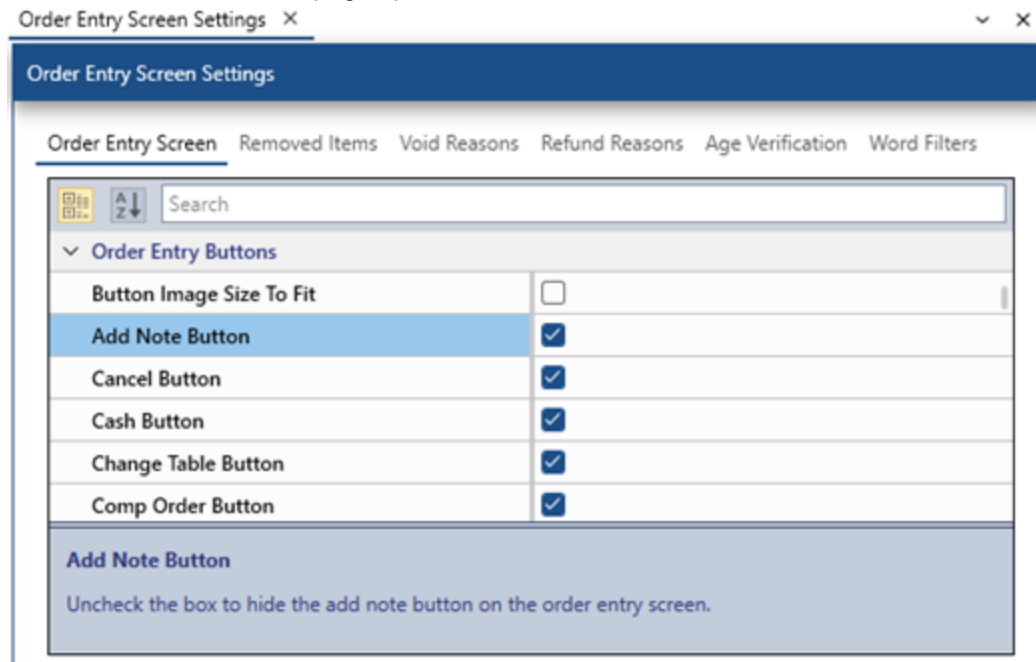
Screen Position

The guest check can be set to appear on the left or right side of the order entry screen. Navigate to back office | settings | main settings | order entry screen. Expand the Appearance group and select the value for the Guest Check Position. Note that the menu items always appear to the right of the menu categories, regardless of the guest check position.



Order Option, Submit & Payment Buttons

The order option buttons settings are located in back office | settings | main settings | order entry screen. Expand the Order Entry Buttons group and uncheck the box to hide the button. Note that some buttons such as the payment buttons are enabled based on the logged-in user's [permissions](#)^[433], and the default state of the Print Receipt button is set in back office | settings | main settings | order entry screen under the Customer Receipt group, as described [here](#)^[388].



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. The individual buttons at the left of the guest check are:

- **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
- **NOTE:** Add a note to the top of the prep ticket
- **RETAIL:** View SKU, PLU, item lookup and price change buttons. Press again to hide the retail screen.
- **GRATUITY:** Add a fixed or percentage gratuity to the order.
- **LOYALTY:** Swipe the loyalty card or enter the loyalty card number using the on-screen keypad
- **REWARDS:** Scan the QR code for customers enrolled in the rewards program
- **DISCOUNT:** Add or modify order discounts
- **COMP:** Comp the entire order. To comp an individual order item, select the item on the guest check
- **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

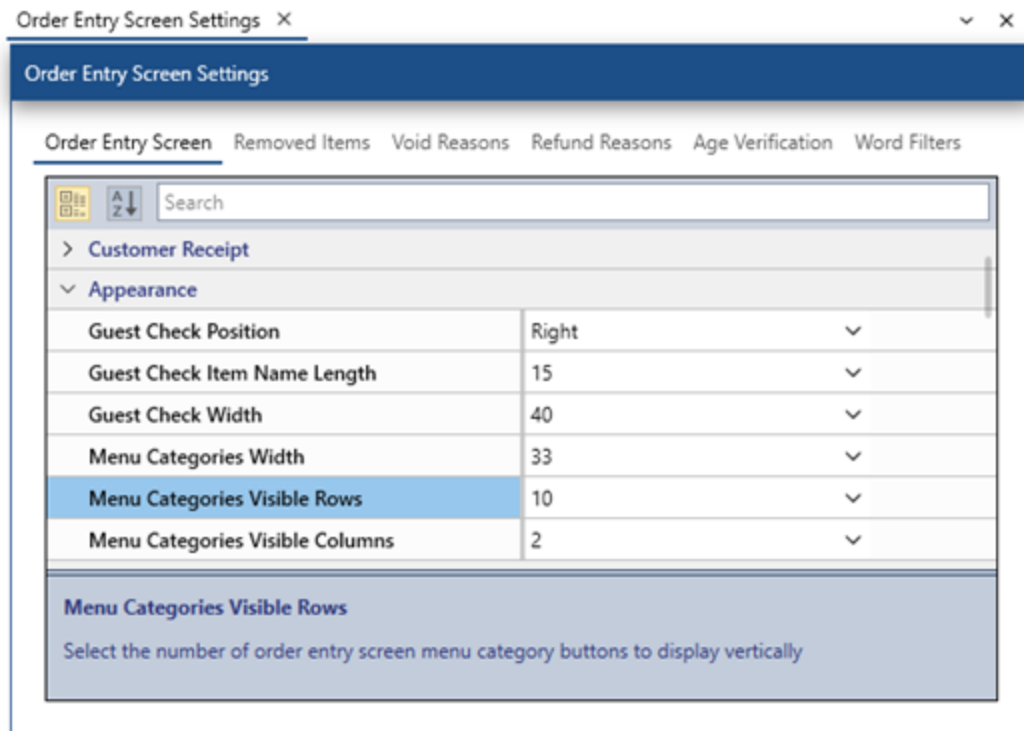
hold" and are sent to the prep printers the next time the order is recalled and submitted.

- **TIME:** Show the time options screen where the order can be [scheduled for a future date/time](#)^[662] or the selected order item can be prevented from printing at the prep printers.
- **REFUND:** Create a refund order
- **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](#)^[708].
- **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

28.1.4 Menu Categories

Menu Categories

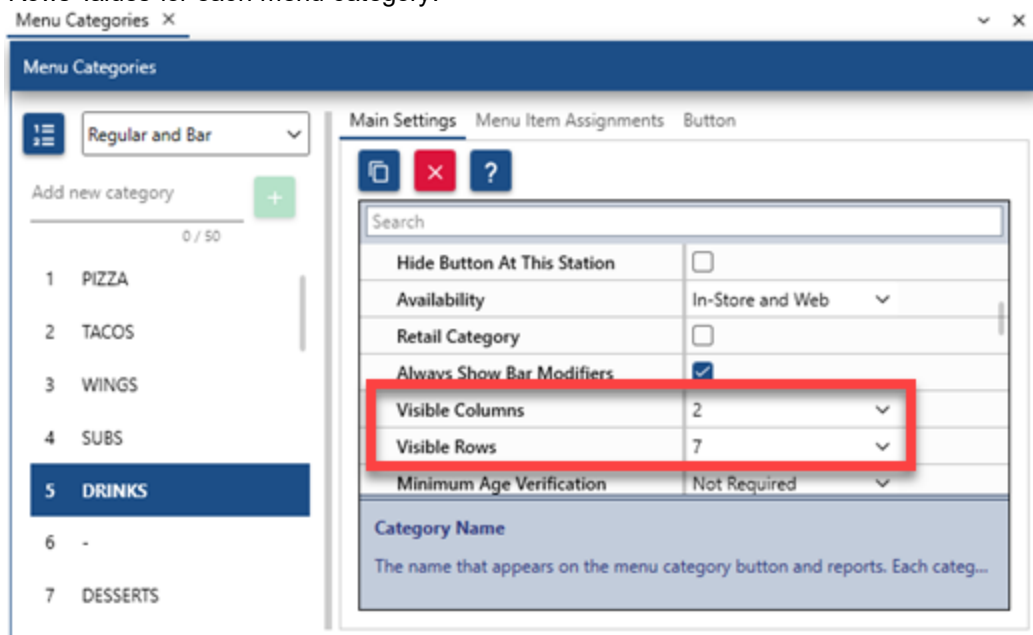
In addition to the [appearance](#)^[554] of each menu category button, the number of visible rows and columns can be set to minimize or eliminate the need to scroll, depending on the number of menu category buttons. Navigate to back office | settings | main settings | order entry screen. Expand the Appearance group and select the value for the Menu Categories Visible Rows and Menu Categories Visible Columns. Up to 3 menu category columns can be displayed on high resolution screens.



28.1.5 Menu Items

The menu item buttons are displayed in a vertical grid and visible menu item rows and columns are set for each menu category. When using 2 or 3 menu category columns, reduce the number of menu item columns so that the button size is acceptable.

Open the categories editor in back office | menu | menu categories and set the Visible Columns and Visible Rows values for each menu category.



In the image below, the drinks category is set to 2 visible columns and 7 visible rows so that all of the drink menu items appear on screen without scrolling.



When the scrollbar is visible, the menu item button width is reduced and it may be necessary to adjust the [screen layout](#) ⁶⁶² to achieve the desired button size.



28.1.6 Scheduled Orders

Scheduled Orders

Orders can be scheduled for a future date/time. Press the [Time](#) ⁶⁶² 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.

SET ORDER START TIME

CURRENT SELECTION
Sun 14 Aug 1:15 PM

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**

28.2 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.



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 are not required. Order types can be disabled in Back Office | Settings | Main Settings | Order Types by checking the box next to Hide Button At All Stations and/or Hide Button At This Station.

Order Type Settings

BAR

COUNTER

DELIVERY

DINE-IN

DRIVE-THRU

PICK-UP

Order Type Name

BAR

Hide Button At All Stations

Hide Button At This Station

Button Position

2

Charge Takeout Containers

Default Menu Category

DRAFT BEER

Print Recommended Gratuities

☒

Rewards Prompt

☐

Order Type Name

The order type name appears on the main screen button, order entry screen, cus...

Transactions

The transactions list displays a list of enabled transaction buttons. 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 are not required. Transaction buttons can be disabled in Back Office | Settings | Main Setting | User Interface | Transaction Buttons by checking the box under the Hide Button column

User Interface Settings

Login Screen Buttons

Login Screen Image

Transaction Buttons

Keyboards

On Screen Clock

Pos Screen Size

	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"/>
	TABLE MANAGEMENT	TABLE MANAGEMENT	8	<input type="checkbox"/>
	CALL CENTER MESSAGES	CALL CENTER MESSAGES	9	<input checked="" type="checkbox"/>

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 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

MANAGER

BACK OFFICE

ROY BATTY

GENERAL MANAGER

4 OPEN · 9 SETTLED ORDERS

TIME CLOCK

LOGOUT

Order Recall List

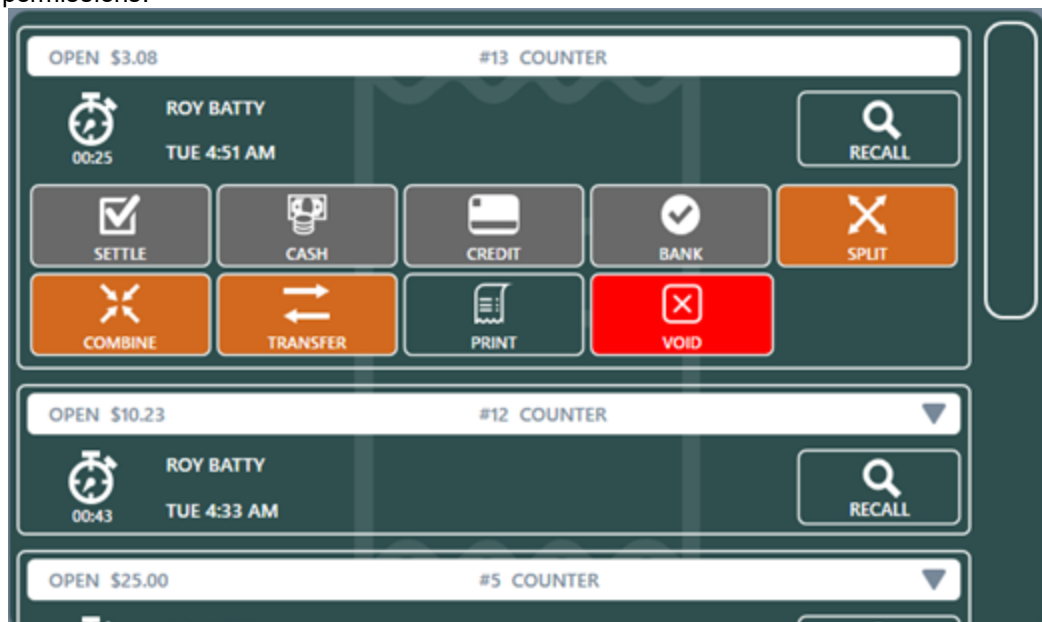
The order recall list displays a list of orders that have not been archived when the end of day is run. The list can be filtered by current user/all users, all order types/specific order type and current orders/scheduled orders. Buttons in the default position appear with white text. Yellow text is used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



- 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 Options

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.

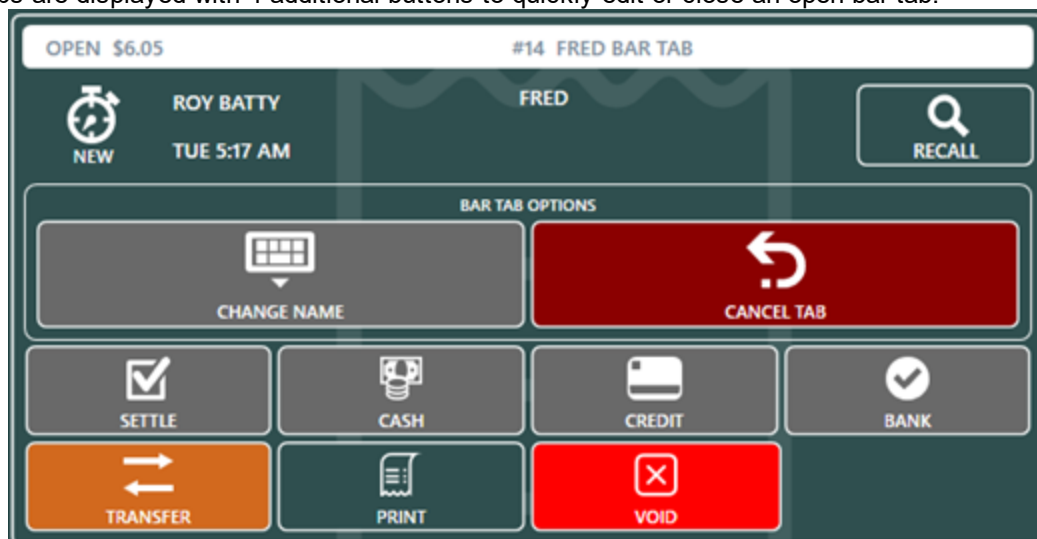


- RECALL: Used to open the selected order on the order entry screen.
- SPLIT: Used to open the selected order on the split order screen. This button is disabled if the currently logged in user's job type does not have the Allow Split permission set to Yes. This button is disabled for bar tabs (see [CANCEL TAB](#)^[670] 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](#) ^[670] 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.
- **PRINT:** Used to print a customer receipt, prep tickets or signature slip(s) 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.
- **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.



- **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.

28.3 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

28.4 Settle 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 Settings | Settle Screen.

Main Settings X

User Interface

General Settings

Deliveries

Sales Tax

Settle Screen

Manager Screen

Order Types

Time Clock & Banking

Order Entry

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"/>

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

BALANCE DUE \$6.10

CASH TRANSACTION

ENTER THE AMOUNT TENDERED

CHANGE PAYMENT METHOD

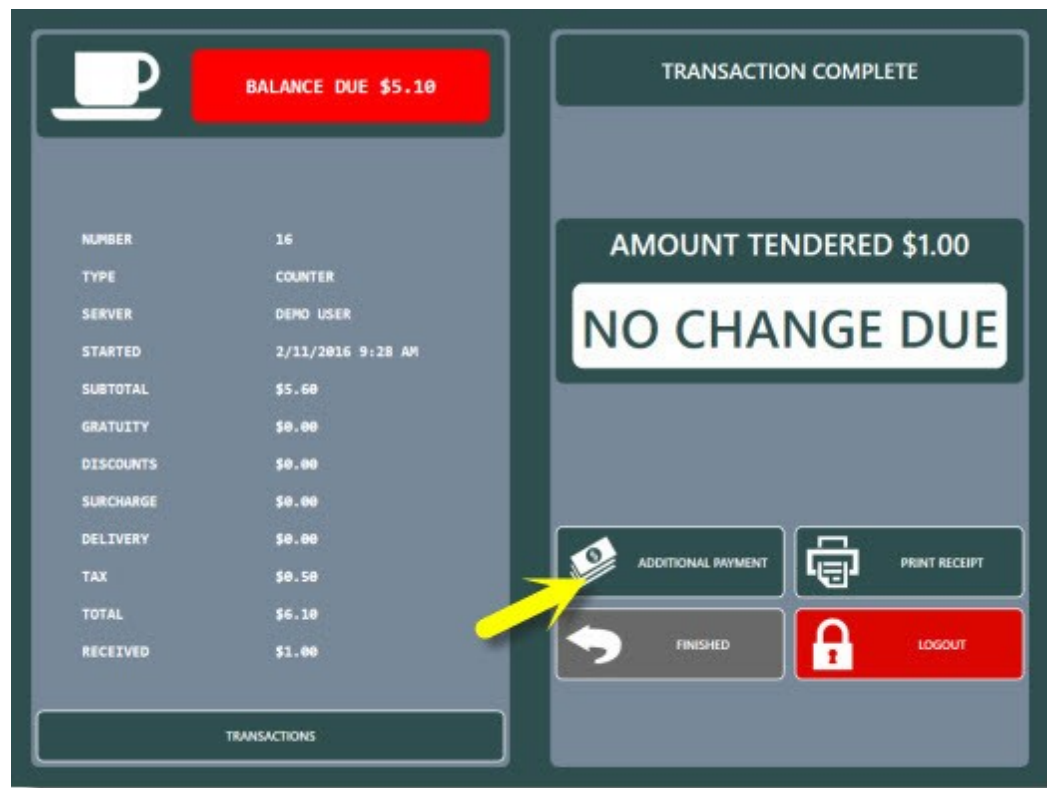
EXACT CHANGE

NEXT \$ AMOUNT

TRANSACTION RECALL PRINT RECEIPT CANCEL

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.

BALANCE DUE \$5.10

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

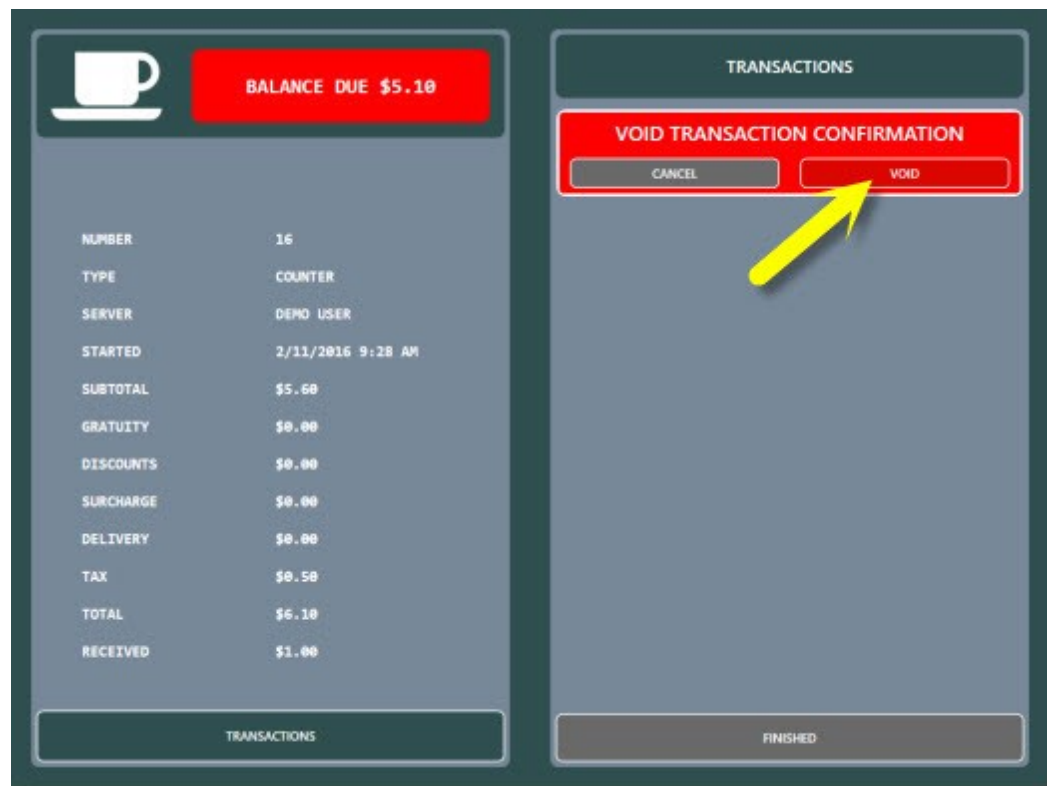
CASH \$1.00
2/11/2016 09:28 DEMO USER **VOID**

TRANSACTIONS

FINISHED

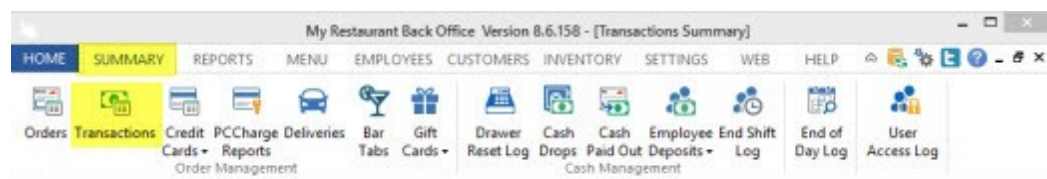
Transactions View

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 Log](#)

#2 - CASH	Order #1	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	Order #2	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	Order #5	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	Order #6	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.

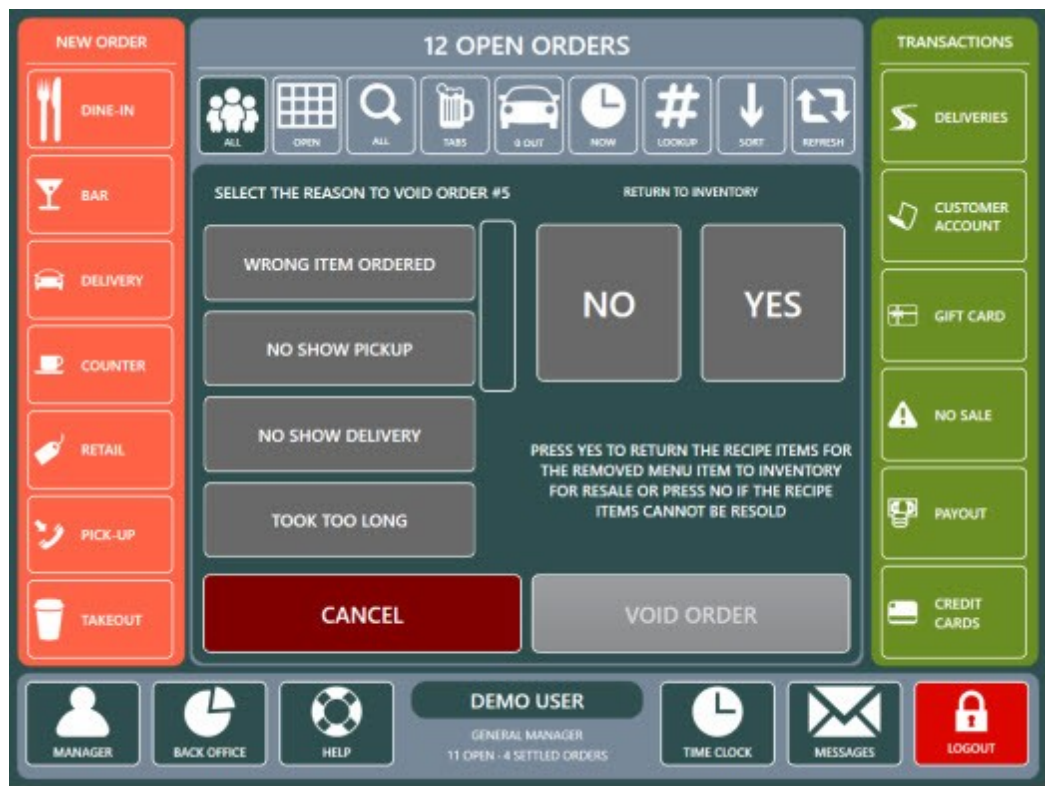
28.5 Void Order

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](#)⁴³³.



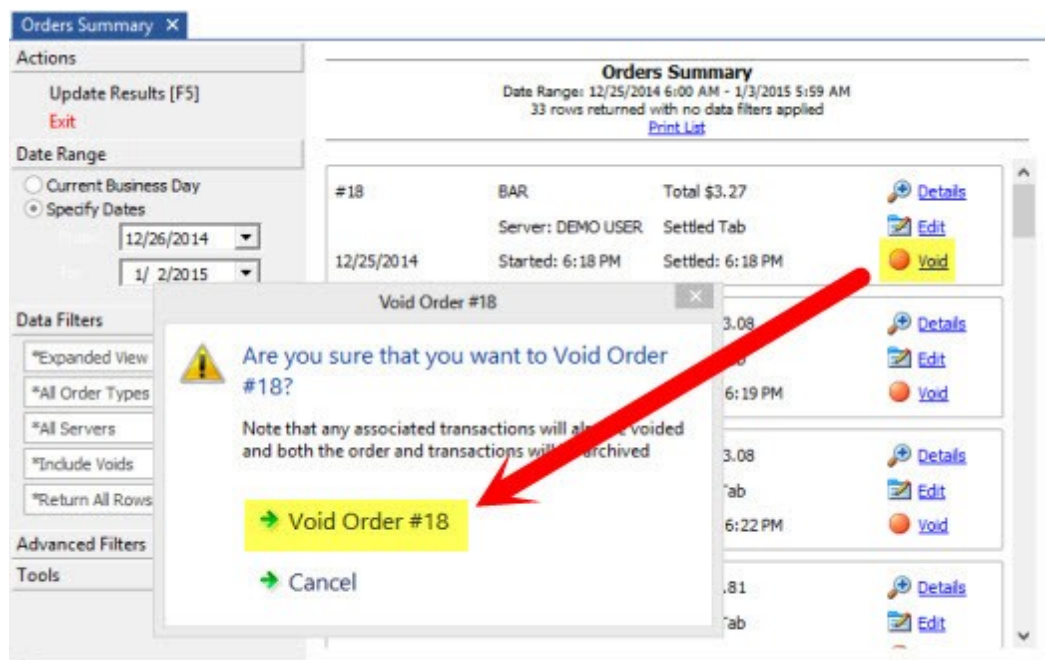
Void Button

Select the void reason to void the order and remove the order from the recall list.



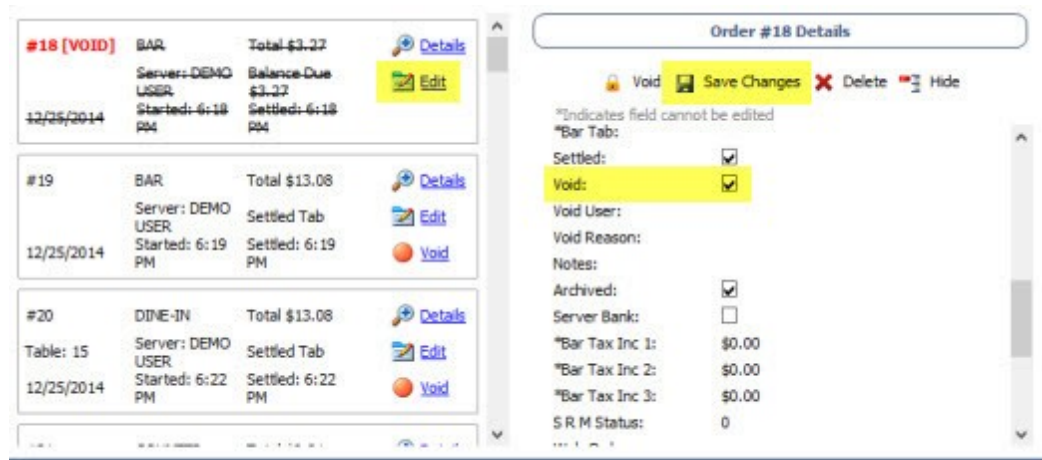
Void Order Confirmation

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 | Orders, 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.

28.6 Split Order

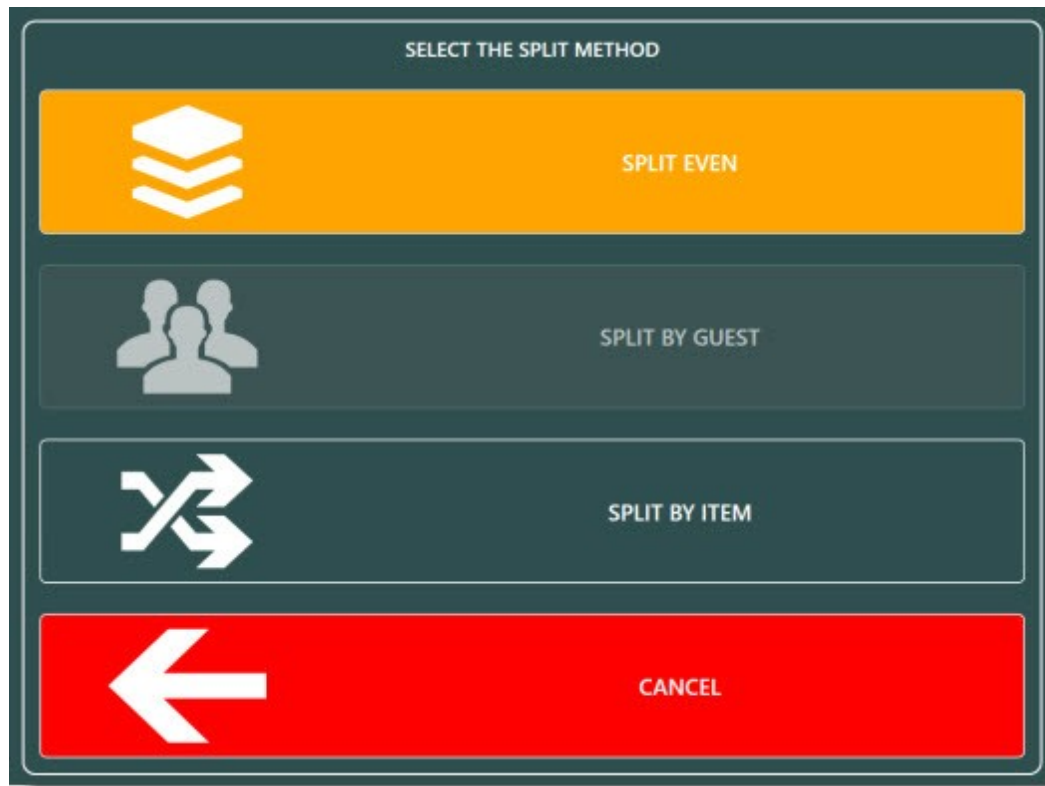
AmigoPOS includes the ability to split an order for customers that wish to pay separately. orders can be split by rearranging order items, split evenly or a separate order can be created for each customer if the [order type](#) ⁽⁷²⁰⁾ is set to use guest selection. When splitting an order evenly, the 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.



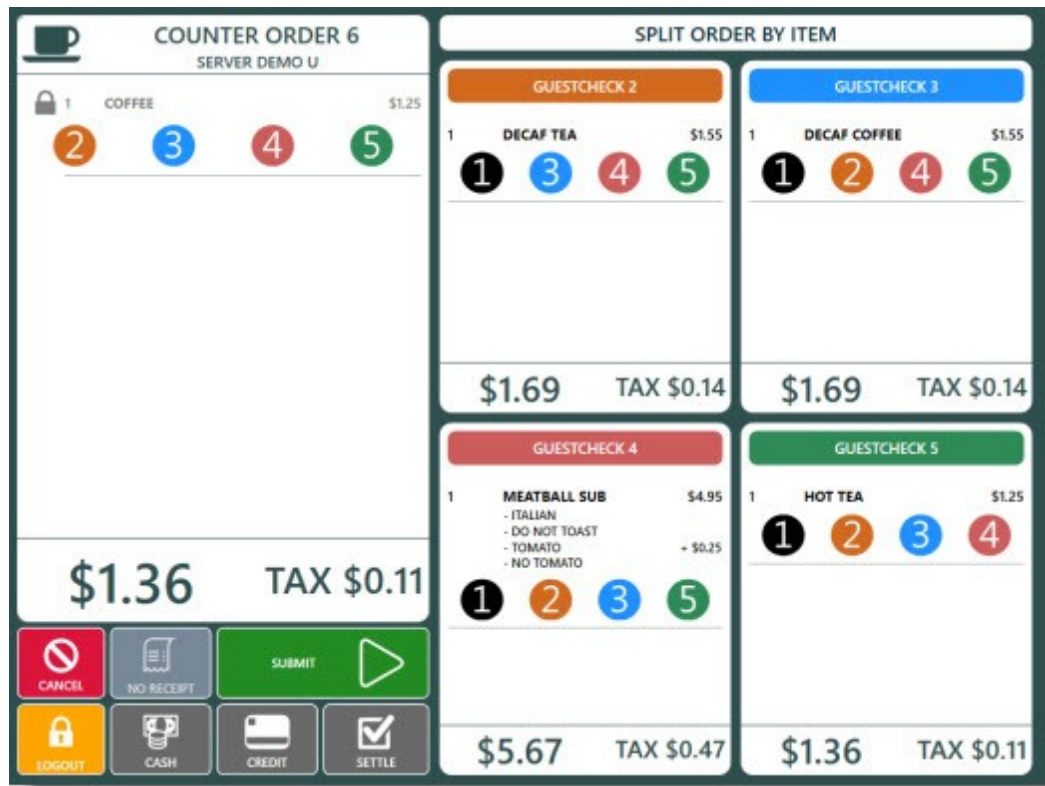
Split Order Button

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](#) ⁷²⁰ 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.

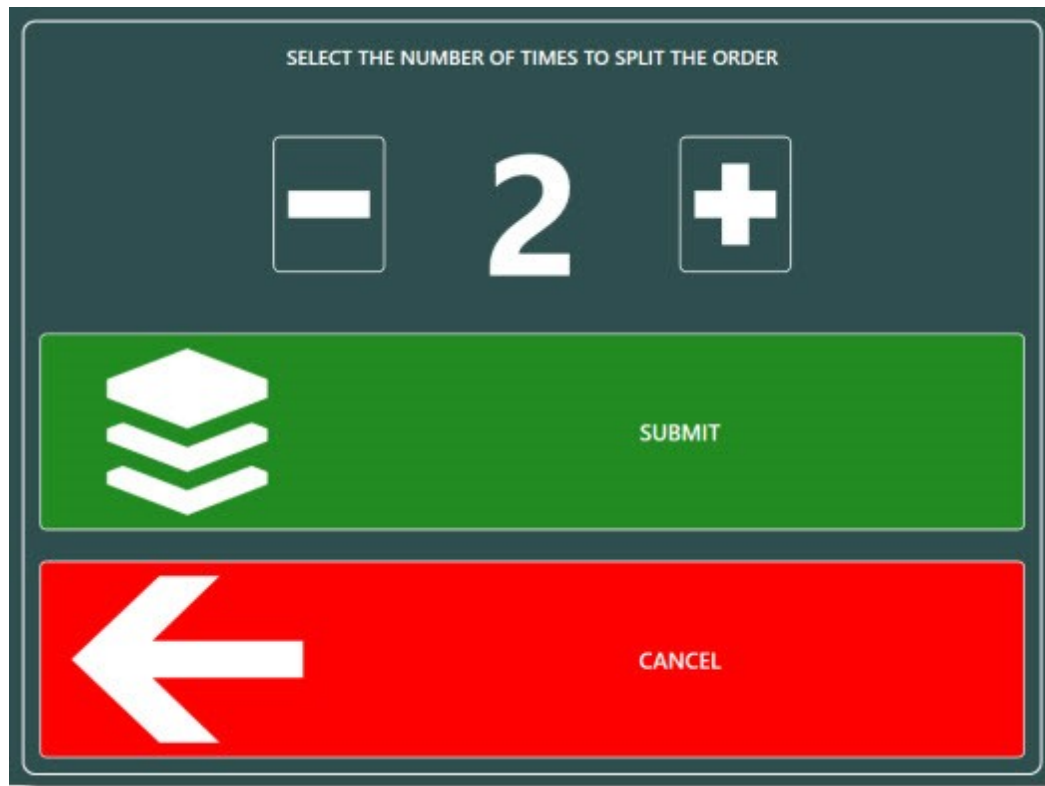
The order must have more than one active guest, the **SPLIT BY GUEST** button is disabled. Menu item guest assignment must be enabled for an order to have more than one active guest. See the [Order Types](#) help topic for additional information.

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.

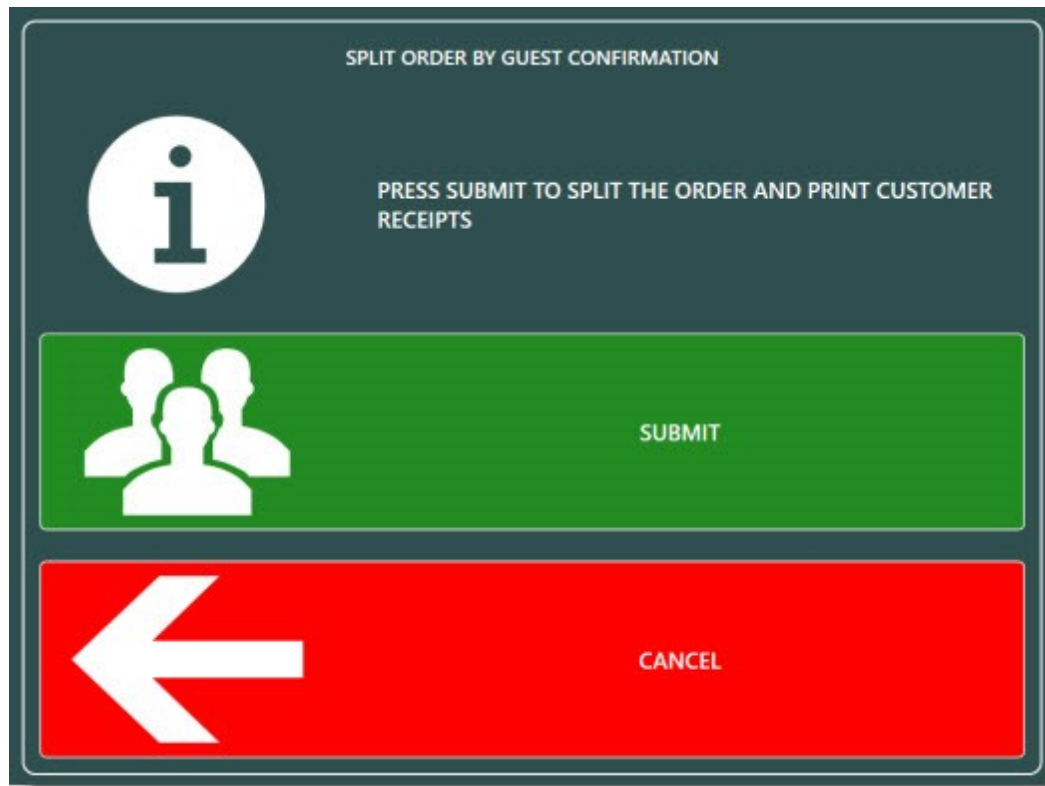
If printed receipts are not required, toggle the printer button to the off position before splitting the order. orders can be printed at any time by pressing the **REPRINT** button on the start screen and selecting the order.

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.



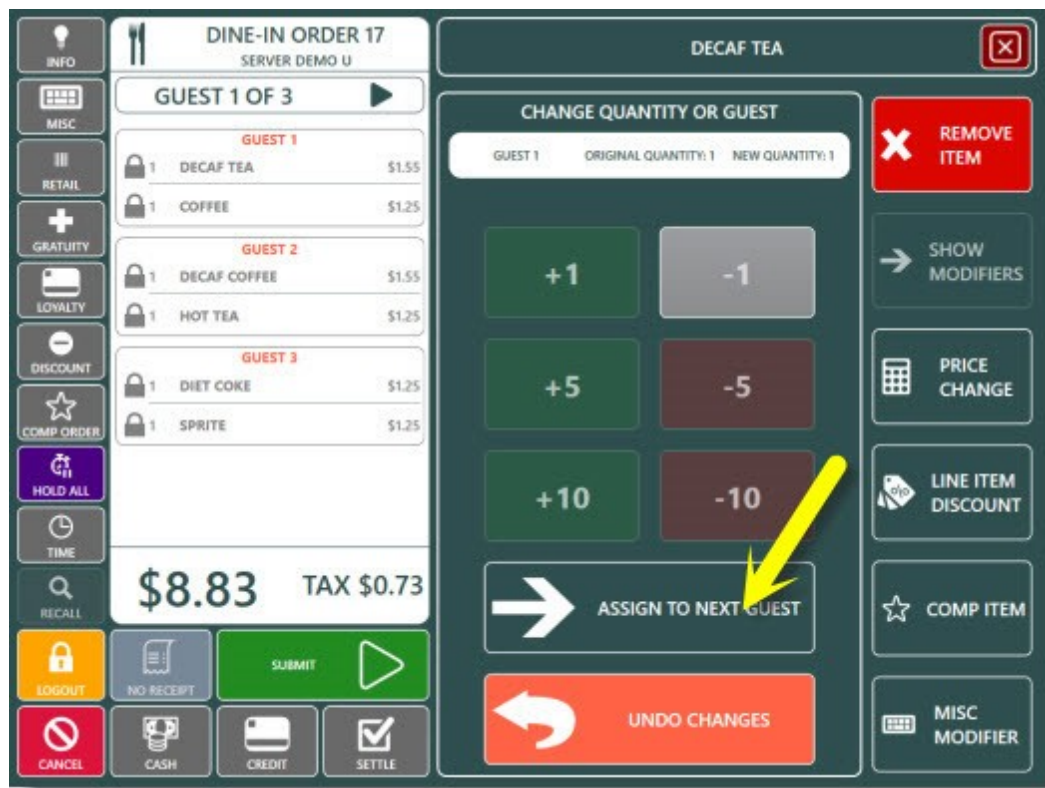
Split Even

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

28.7 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.



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.



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.

28.8 Bar Tabs

AmigoPOS includes the ability to two types of bar tabs:

- Enter the customer name and (optionally) set a limit
- 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.

Order Entry Screen Settings	
Order Entry Screen Removed Items Void Reasons Refund Reasons Age Verification Word Filters	
> Customer Receipt	
> Appearance	
> Regular Menu	
> Bar Menu	
> Discounts	
> Misc Items	
▼ Bar Tabs	
Default Bar Tab Amount	25
Bar Tab Preset 1	10
Bar Tab Preset 2	50
Bar Tab Preset 3	75
Bar Tab Preset 4	100
Open Bar Tabs List Hide Open PreAuths	<input checked="" type="checkbox"/>
Show Bar Tab Button	<input checked="" type="checkbox"/>
Show Bar Tab PreAuth Button	<input checked="" type="checkbox"/>
Print Receipt Button* Check box to automatically enable the Print Receipt button each time an order is started or recalled at this pos station	

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.
- **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.

NETePay™

\$6.54 BAR TAB
PRESS TO CHANGE

\$10 BAR TAB **\$50** BAR TAB **\$75** BAR TAB

ORDER SUMMARY

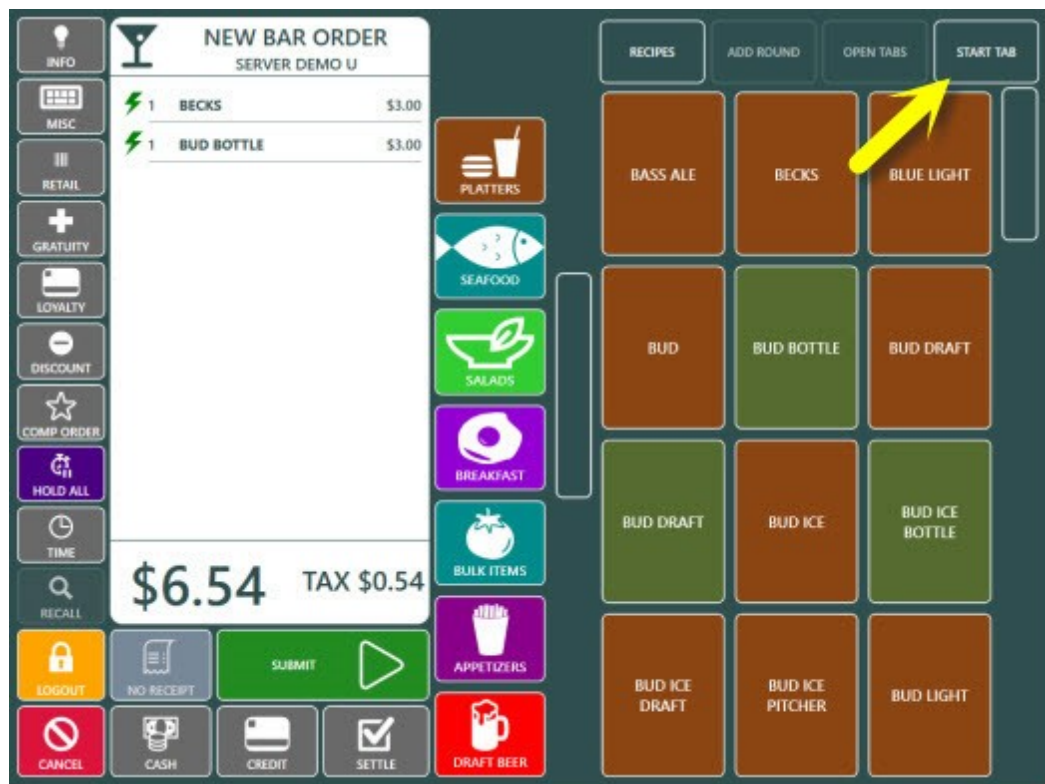
ORDER NUMBER	13
TYPE	BAR
SERVER	DEMO USER
STARTED	2/11/2016 8:56 AM
SUBTOTAL	\$6.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.54
TOTAL	\$6.54
RECEIVED	\$0.00

CUSTOMER RECEIPT

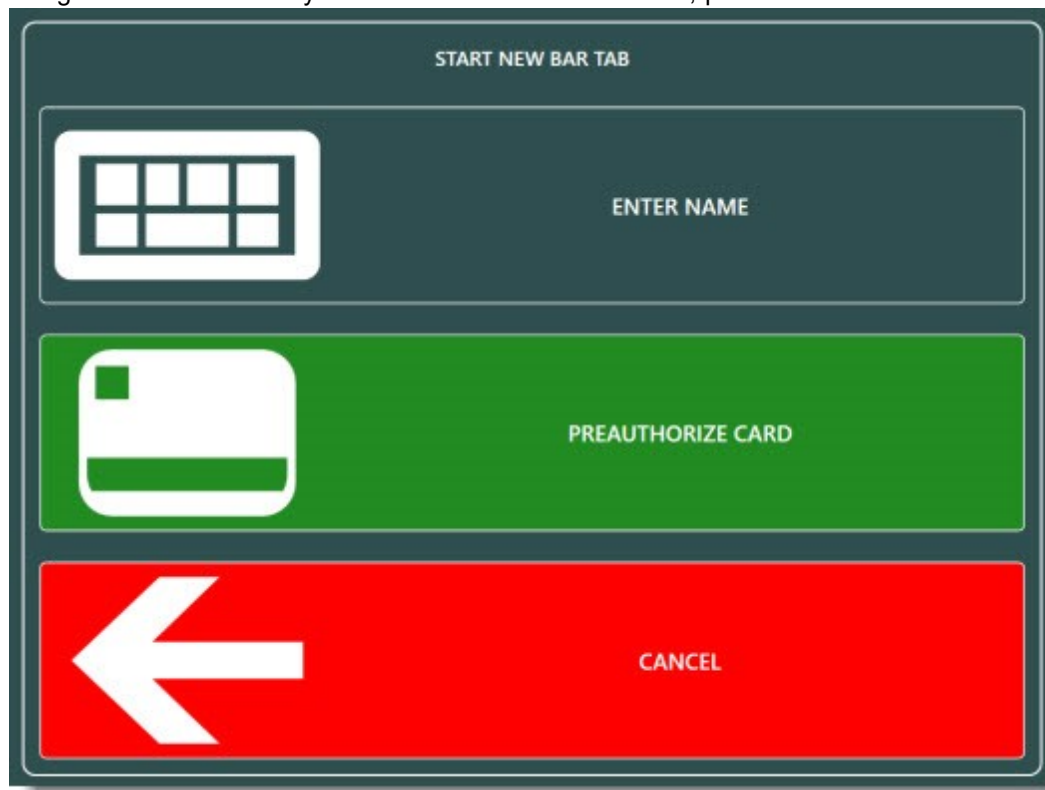
SIGNATURE SLIP

RECALL ORDER

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.



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



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.

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

The screenshot displays the 'START NEW BAR TAB' interface. At the top, the title 'START NEW BAR TAB' is centered. Below it, on the left, is a 'CHANGE LIMIT' button. To its right is a white text input field. Further right is a yellow button showing the amount '\$25.00'. A yellow arrow points to this button. Below these elements is a numeric keypad with digits 1-9, 0, and a decimal point, followed by a backspace arrow. Below the numeric keypad is a QWERTY keyboard. At the bottom of the screen are two large buttons: a red 'CANCEL' button on the left and a green 'SAVE' button on the right.

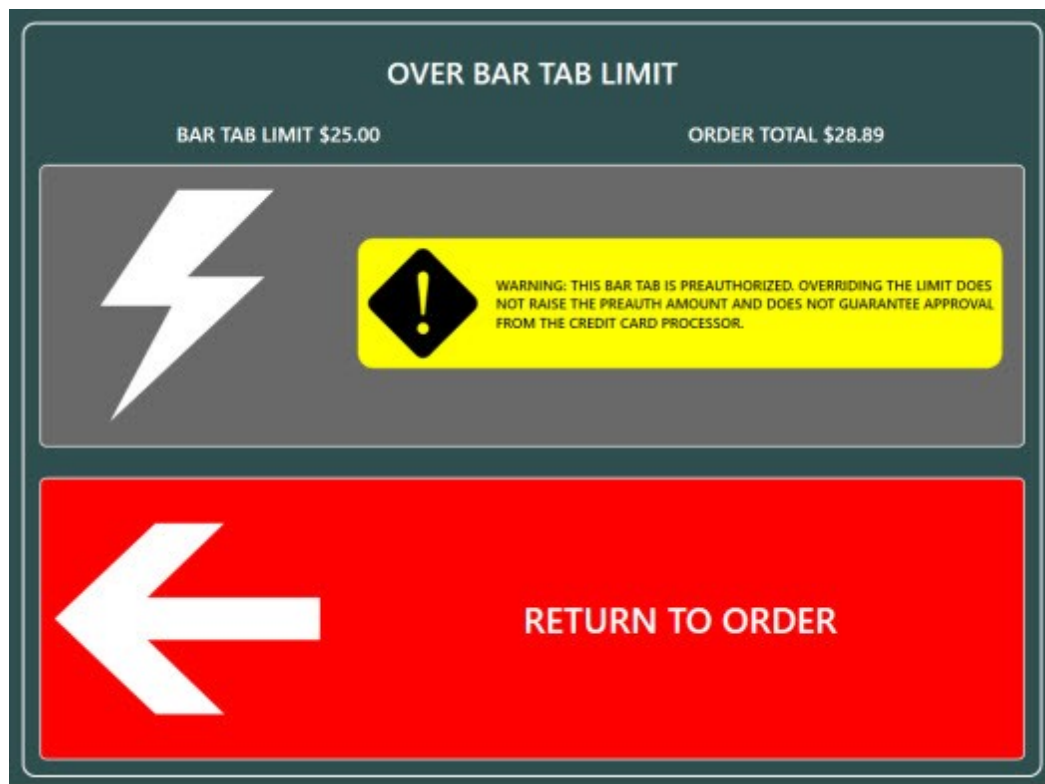
To start a new bar tab using the customer's credit card, press **PREAUTHORIZE CARD**. The credit card screen will appear. Confirm that the preset limit is correct, press the Pre Authorize button and swipe the customer's card. If the transaction is successful, the new bar tab will be created using the 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.

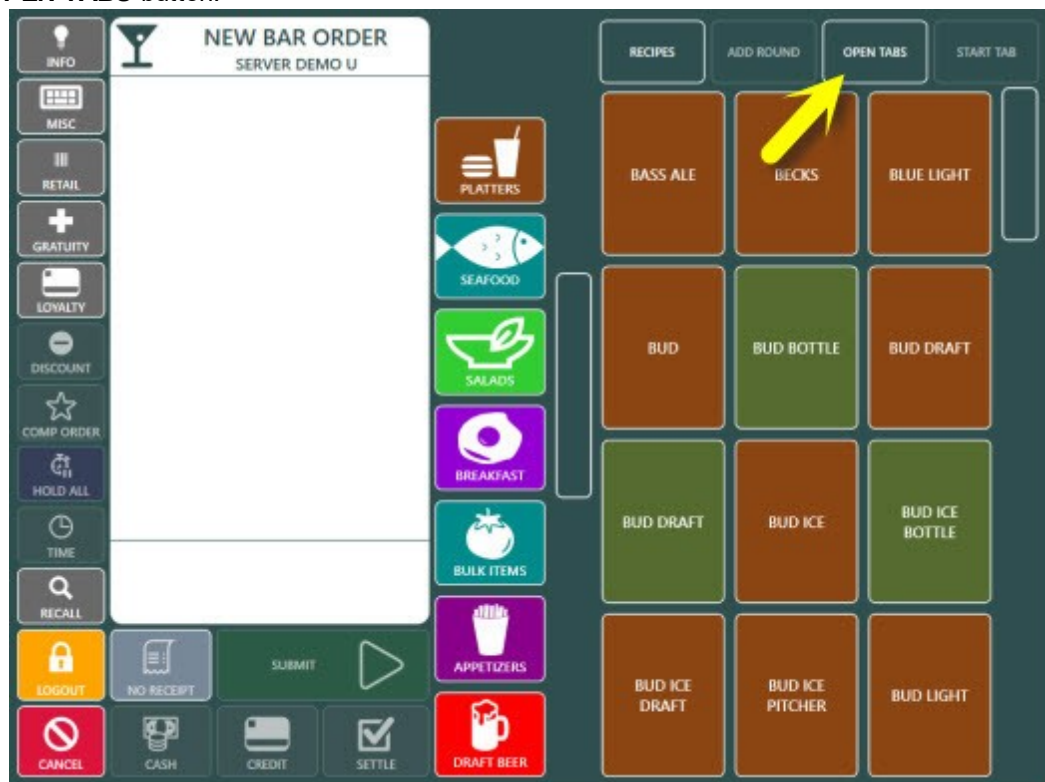
The image shows a POS interface for NETePay™. The main display area shows a green box with '\$50.00 BAR TAB' and a 'PRESS TO CHANGE' prompt. Below this are three red buttons for '\$10 BAR TAB', '\$50 BAR TAB', and '\$75 BAR TAB'. To the left is a vertical menu with buttons: ORDER DETAILS, SWIPE CARD, KEYED ENTRY, DEBIT SALE, VOICE AUTH, TRANSACTIONS, HELP, and FINISHED. To the right are buttons for CUSTOMER RECEIPT, SIGNATURE SLIP, and RECALL ORDER. The ORDER SUMMARY table is as follows:

ORDER SUMMARY	
ORDER NUMBER	13
TYPE	BAR
SERVER	DEMO USER
STARTED	2/11/2016 8:56 AM
SUBTOTAL	\$6.00
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.54
TOTAL	\$6.54
RECEIVED	\$0.00

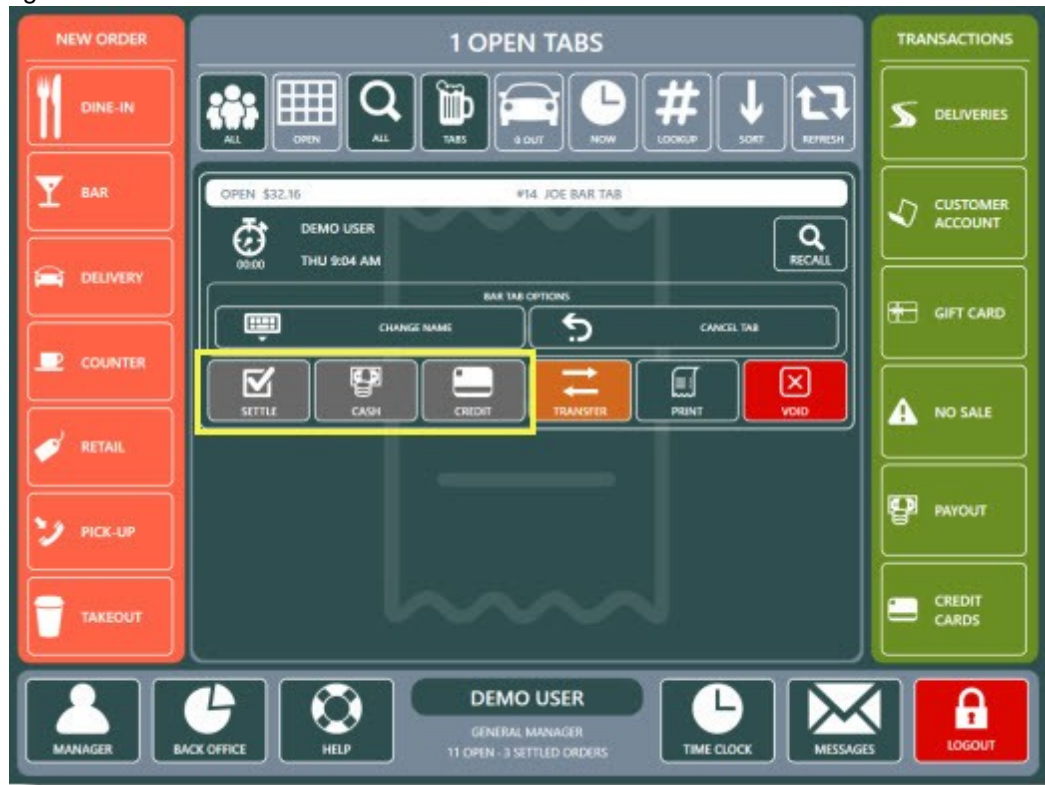
The preset limit will prevent the server from entering a new item on the order if the item will cause the order total to exceed the limit. This limit can be disabled for name only bar tabs, but must be enforced for pre authorized bar tabs, since the payment processor only guarantees the preauthorized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



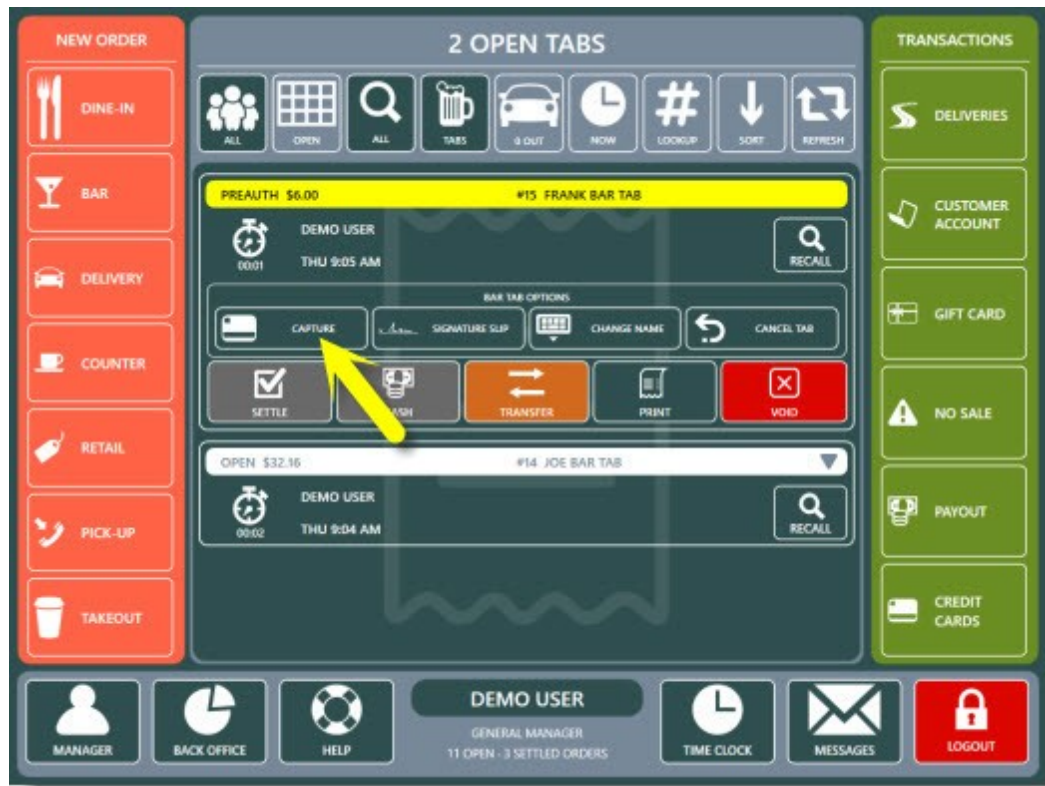
When the customer is ready to settle the bar tab, reopen the order on the order entry screen by pressing the **OPEN TABS** button.



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



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.



Important Notes:

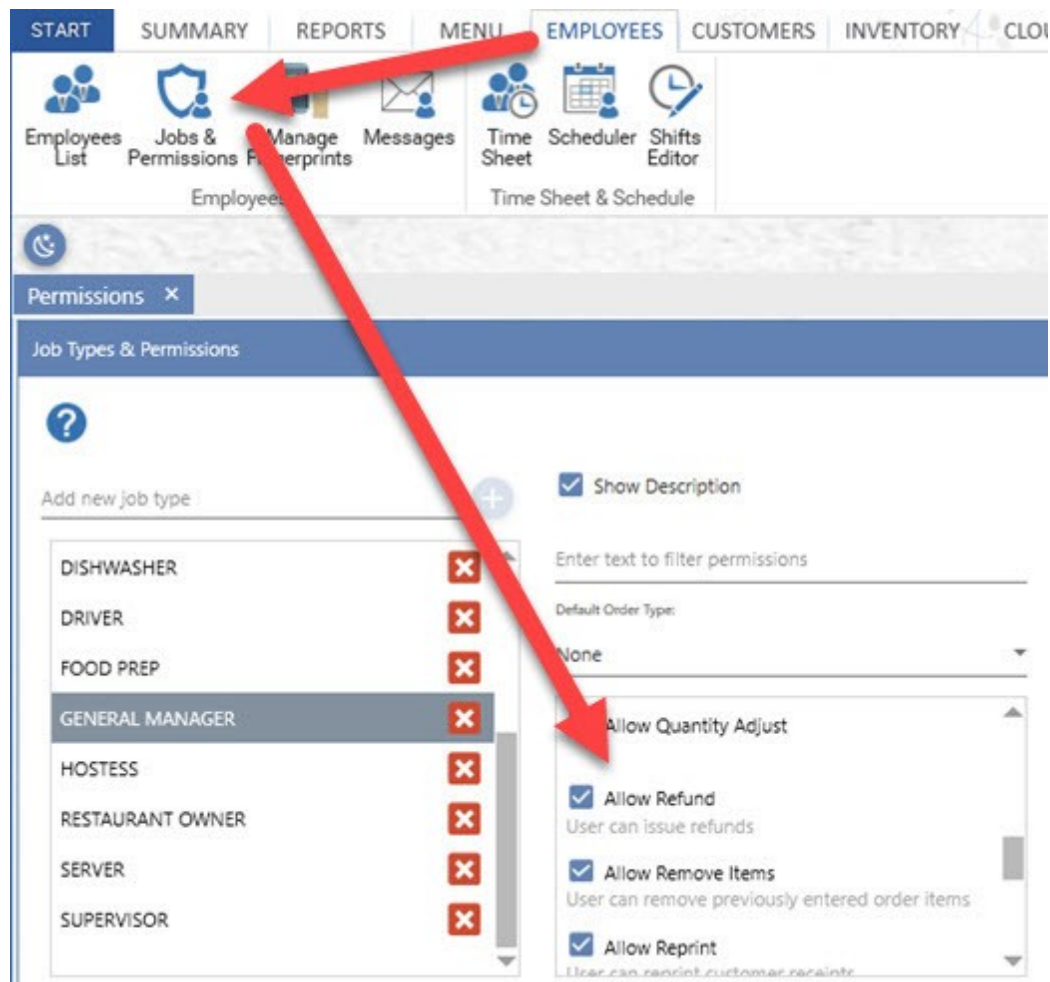
- External credit card computer users should use the first method to start a new bar tab. Preauthorized bar tabs are available only when integrated credit card processing is used.
- Regardless of which method is used to start a new bar tab, the initial drink order is submitted immediately when the **Enter 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.

28.9 Refunds

Refund are used to return cash to a customer after an order has been settled.

User Permission

Verify that the Allow Refund permission is enabled for each job type that can issue a refund.



Cash Payout Reason

A cash payout transaction is used to balance the cash drawer when a refund is issued. The cash payout reason can be edited in back office | settings | main settings | settle screen | cash payouts | payout reasons.

The screenshot shows the AmigoPOS 9 interface with the 'SETTINGS' menu open. The 'Settle Screen Settings' window is displayed, showing the 'Cash Payouts' tab. The 'Payout Reasons' section is active, showing a table of reasons and their button positions.

PAYOUT REASON	BUTTON POSITION
REFUND	0
SERVICE RENDERED	1
PRODUCT DELIVERY	2
DRIVER DELIVERY	2
REFUND	3
PAY ADVANCE	4

Cash Payout Recipient

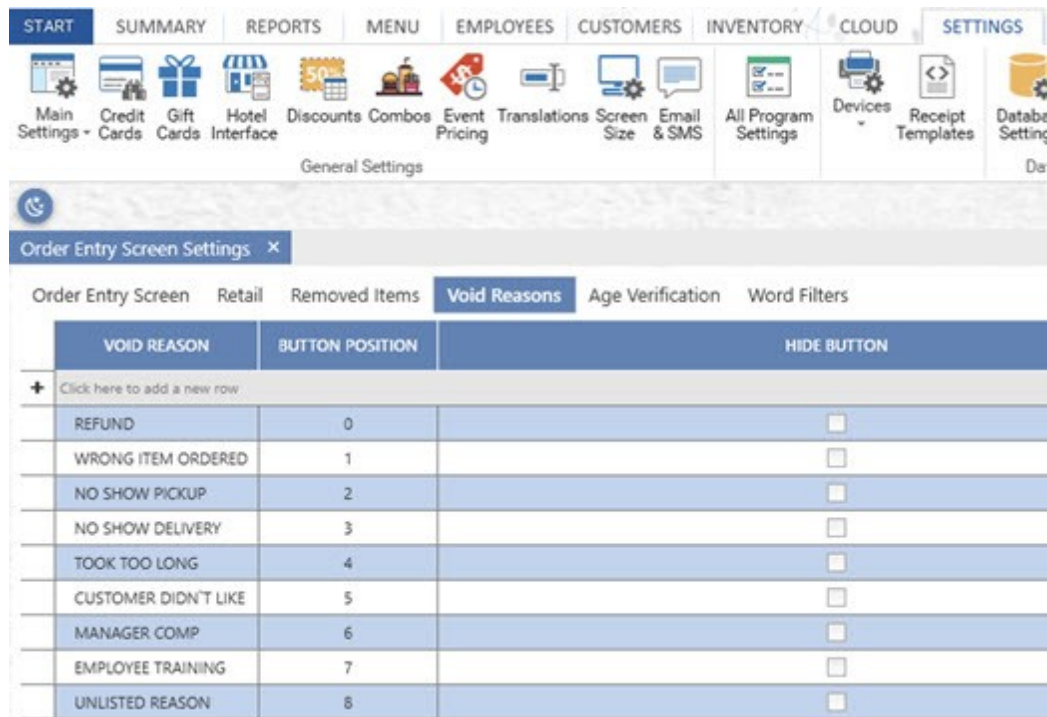
Similarly, the cash payout recipient can be edited in back office | settings | main settings | settle screen | cash payouts | payout recipients.

The screenshot shows the AmigoPOS 9 interface with the 'SETTINGS' menu open. The 'Settle Screen Settings' window is displayed, showing the 'Recipients' tab. The 'Payout Reasons' section is active, showing a table of recipients and their button positions.

RECIPIENT	BUTTON POSITION
REFUND	0
MISC	1
BAKERY	3
EXTERMINATOR	4
UNLISTED	5
CUSTOMER	6
EMPLOYEE	7
GROCERY STORE	8

Void Reason

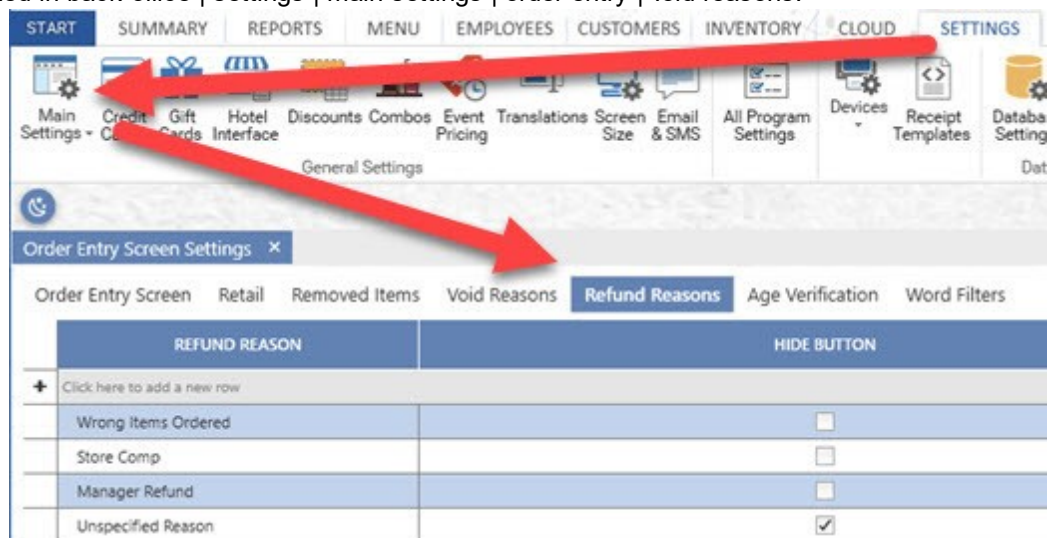
The refund is saved as a voided order. The void reason can be edited in back office | settings | main settings | order entry | void reasons.



VOID REASON	BUTTON POSITION	HIDE BUTTON
REFUND	0	<input type="checkbox"/>
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"/>

Refund Reason

The user is prompted to select a reason for the refund before the refund is finalized. Refund reasons can be edited in back office | settings | main settings | order entry | void reasons.



REFUND REASON	HIDE BUTTON
Wrong Items Ordered	<input type="checkbox"/>
Store Comp	<input type="checkbox"/>
Manager Refund	<input type="checkbox"/>
Unspecified Reason	<input checked="" type="checkbox"/>

Usage

Start a new order, enter the items to refund and click the Refund button at the left. Click Submit, specify whether or not to return the items to inventory and select the refund reason to save the refund.

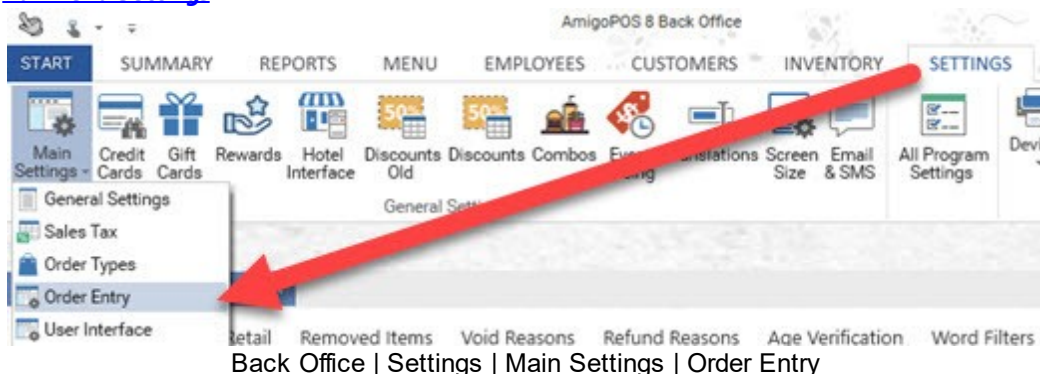
Order Entry Screen

29 Order Entry Screen

29.1 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](#) ⁷⁰⁸
- [Discounts](#) ⁷⁰⁹
- [Regular Menu](#) ⁷¹⁰
- [Loyalty Cards](#) ⁷¹¹
- [Order Entry Buttons](#) ⁷¹¹
- [Bar Menu Settings](#)



Bar Tabs

The screenshot shows the 'Order Entry Screen Settings' window. The 'Order Entry Screen' tab is selected, and the 'Bar Tabs' section is expanded. It displays a table of bar tab presets and their values.

Bar Tab Preset	Value
Bar Tab Preset 1	10
Bar Tab Preset 2	50
Bar Tab Preset 3	75
Bar Tab Preset 4	100
Default Bar Tab Amount	25
Open Bar Tabs List Hide Open Pre Auths	Yes
Show Bar Tab Button	Yes
Show Bar Tab Pre Auth Button	Yes

Below the table, there is a section for 'Bar Tab Preset 1' with a description: 'Enter a whole number value for the first bar tab preset button or set to zero to hide the button'.

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

Order Entry Screen Settings ×

Order Entry Screen
Retail
Removed Items
Void Reasons
Refund Reasons

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
Bar Menu Settings

Manual Discount Text

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

Order Entry Screen Settings ×

Order Entry Screen
Retail
Removed Items
Void Reasons
Refund Reasons

Discounts

Regular Menu

Display Modifiers Only If Mandatory	No
Order Menu Items Alphabetically	No
Order Modifiers Alphabetically	No
Send Misc Items To Prep 1	Yes
Mandatory Beverage Category	DRINKS

Bar Tabs
Loyalty Cards
Order Entry Buttons
Bar Menu Settings

Display Modifiers Only If Mandatory

Show modifiers only when mandatory modifier groups are assigned to the menu item

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

Loyalty Cards

Order Entry Screen Settings	
Order Entry Screen	
Retail Removed Items Void Reasons Refund Reasons	
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	
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.	

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](#) topic for additional print options)

Order Entry Screen Settings x

Order Entry Screen Retail Removed Items Void Reasons Refund Reasons

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

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

Order Entry Button Settings

- **Fixed Gratuity Amount (1-4):** Enter the gratuity amount to display on the order entry screen manual gratuity buttons 1-4. Set to a negative number to hide the button. Use a value of 0 to disable the mandatory gratuity for the current order.
- **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
Order Bar Menu Items Alphabetically	Yes
Order Bar Optionals Alphabetically	No
*Station Located at Bar	Yes
*Hide Cash Tender Button	Yes
*Hide Recall Button	Yes
*Hide Add Round Button	Yes
*Hide Drink Recipes Button	Yes
*Hide Shortcuts Button	No

Bar Menu Modifier Markup
Enter a numeric value to use when calculating the suggested price on the inventory screen for bar menu modifiers

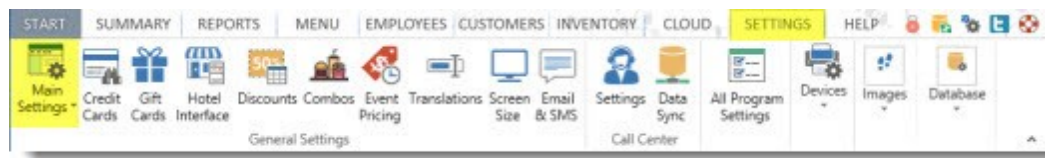
Bar Menu Settings

- 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

29.2 Removed Items

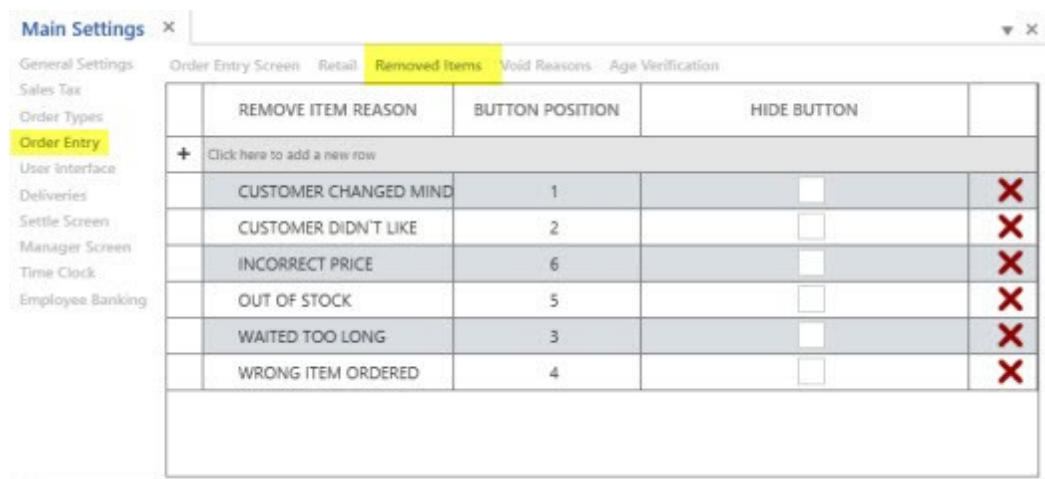
The **Removed Items** tab in Back Office | Settings | Main Settings | Order Entry contains the list of items that appears when an item is removed from an existing order on the order entry screen. The user

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.

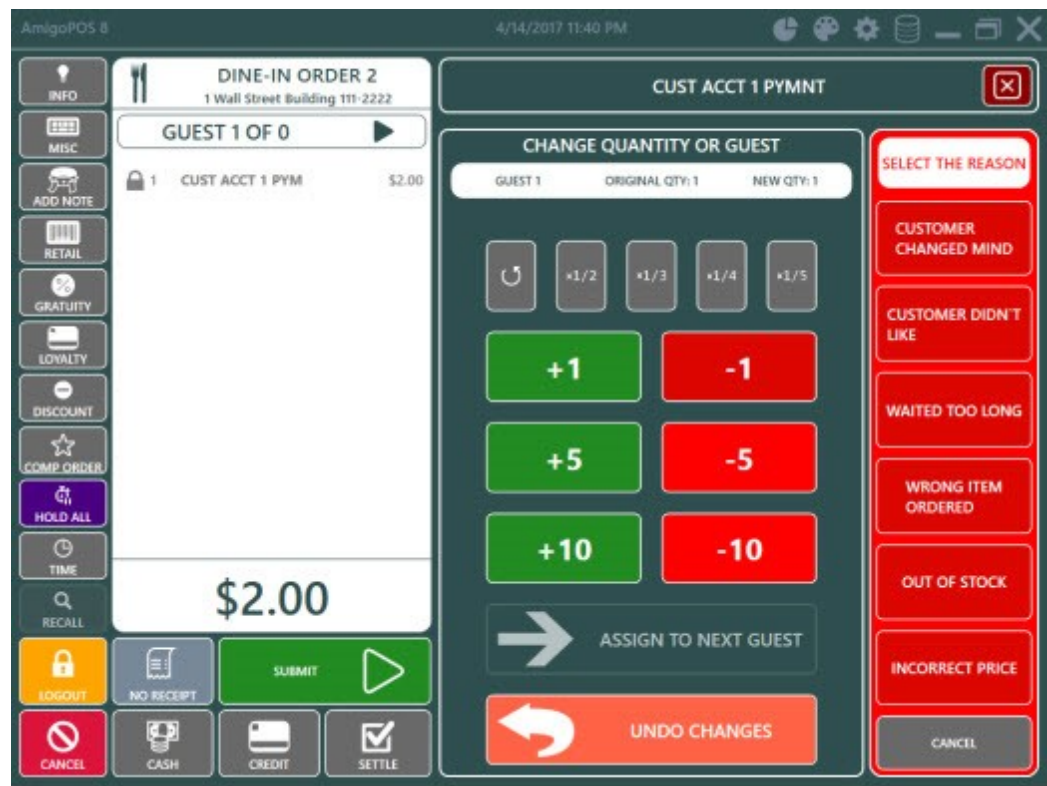


Back Office | Settings | Main Settings

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.



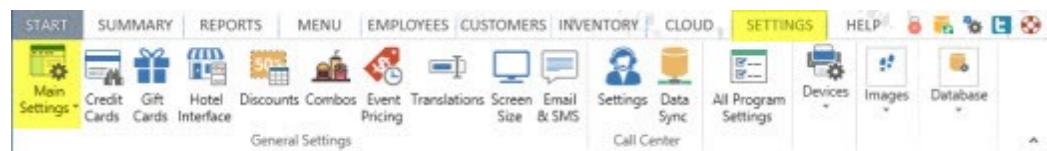
Removed Order Items Reasons



Remove Item Confirmation

29.3 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 Settings | Order 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 x

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"/>	X
	NO SHOW PICKUP	2	<input type="checkbox"/>	X
	NO SHOW DELIVERY	3	<input type="checkbox"/>	X
	TOOK TOO LONG	4	<input type="checkbox"/>	X
	CUSTOMER DIDN'T LIKE	5	<input type="checkbox"/>	X
	MANAGER COMP	6	<input type="checkbox"/>	X
	EMPLOYEE TRAINING	7	<input type="checkbox"/>	X
	UNLISTED REASON	8	<input type="checkbox"/>	X

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

Order Types

30 Order Types

30.1 General Settings

AmigoPOS can 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 | Order Types. The settings are shared by all pos stations and a [database update](#)^[246] is required after changing the settings.

Order Type Settings

Search

Order Type Name	BAR
Hide Button At All Stations	<input type="checkbox"/>
Hide Button At This Station	<input type="checkbox"/>
Button Position	2
Charge Takeout Containers	<input type="checkbox"/> False
Default Menu Category	DRAFT BEER
Print Recommended Gratuities	<input checked="" type="checkbox"/>
Rewards Prompt	<input type="checkbox"/>
Loyalty Card Prompt	<input type="checkbox"/>
Surcharges	
Surcharge Text	SURCHARGE
Surcharge Type	Percentage
Surcharge Amount	22.00
Surcharge Tax Rate	0% [ID:5/NON-TAXABLE]
Mandatory Gratuity	
Enable Mandatory Gratuity	<input type="checkbox"/>
Minimum Guests For Gratuity	1
Gratuity Amount	0.15
Include Tax In Gratuity Calculation	<input type="checkbox"/>
Exclude Discount From Mandatory...	<input type="checkbox"/>
Customer Receipt	
Auto Print Receipt	<input type="checkbox"/>
Prep Tickets	
Print 3-Digit Order Number At...	<input type="checkbox"/>

Order Type Name
The order type name appears on the main screen button, order entry screen, customer receipt, prep ticket and remote display

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

30.2 Mandatory Gratuity

AmigoPOS includes the ability to add a gratuity to any order based on [order type](#)⁷²⁰ 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.

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.

The screenshot shows the 'Order Type Settings' window. On the left is a list of order types: BAR, COUNTER, DELIVERY, DINE-IN (selected), DRIVE-THRU, PICK-UP, and RETAIL. The main area displays settings for the selected order type. A red box highlights the 'Mandatory Gratuity' section, which includes the following settings:

Mandatory Gratuity	
Enable Mandatory Gratuity	<input checked="" type="checkbox"/>
Minimum Guests For Gratuity	10
Gratuity Amount	0.15
Include Tax In Gratuity Calculation	<input type="checkbox"/>
Exclude Discount From Mandatory...	<input type="checkbox"/>

Below the red box, other settings like 'Customer Receipt', 'Prep Tickets', 'Label Printers', and 'Order Entry' are visible. At the bottom, there is a summary section for 'Enable Mandatory Gratuity' with a description: 'Check box to automatically apply a mandatory gratuity to the order'.

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

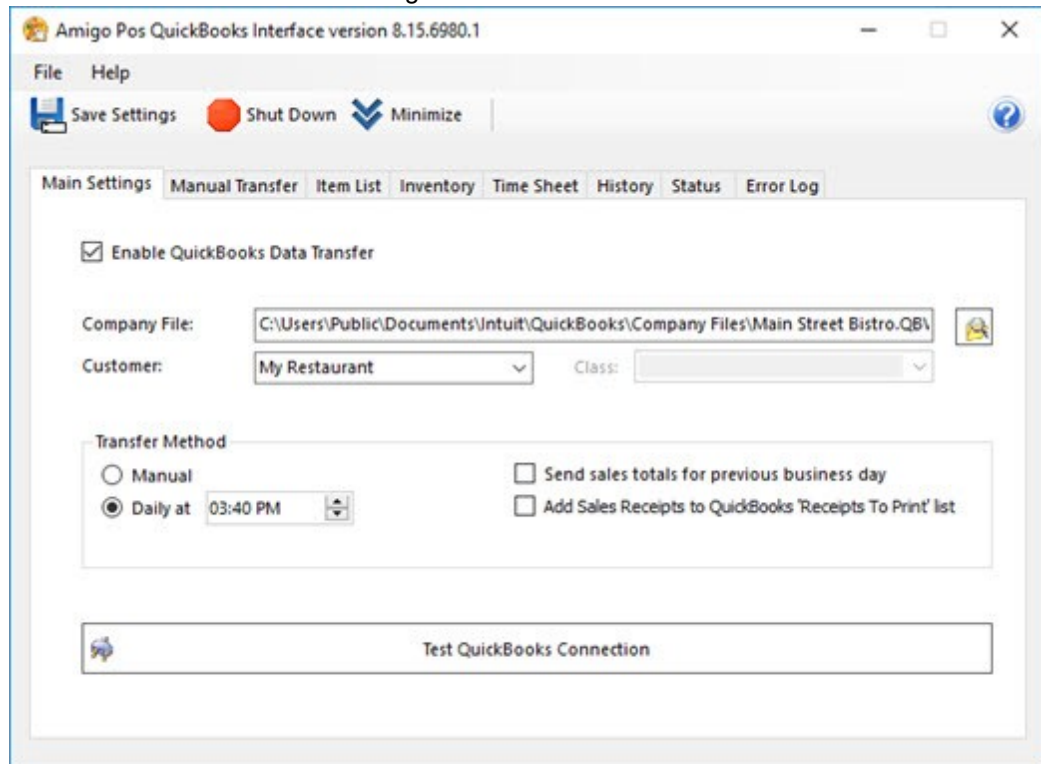
QuickBooks Desktop

31 QuickBooks Desktop

31.1 Introduction

31.1.1 Overview

The AmigoPOS QuickBooks Interface automatically transfers sales data to Intuit QuickBooks desktop edition. The interface is included with AmigoPOS at no additional cost.



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 to sales data, time sheet and inventory data can be transferred, and the ability to support multiple locations (i.e. franchises) with a single company file is supported.

Sales Receipt

CUSTOMER: **My Restaurant** TEMPLATE: **Custom Sale...**

DATE: **02/09/2019** SOLD TO:
 SALE NO.: **6** CHECK NO.:
 CHECK NO.:
 CHECK NO.:

ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Regular ...	Regular Menu Item Sales		4.10	4.10
Sales T...	Tax Group 1		0.76	0.76
Cash D...	Credit Card Payments			-10.57

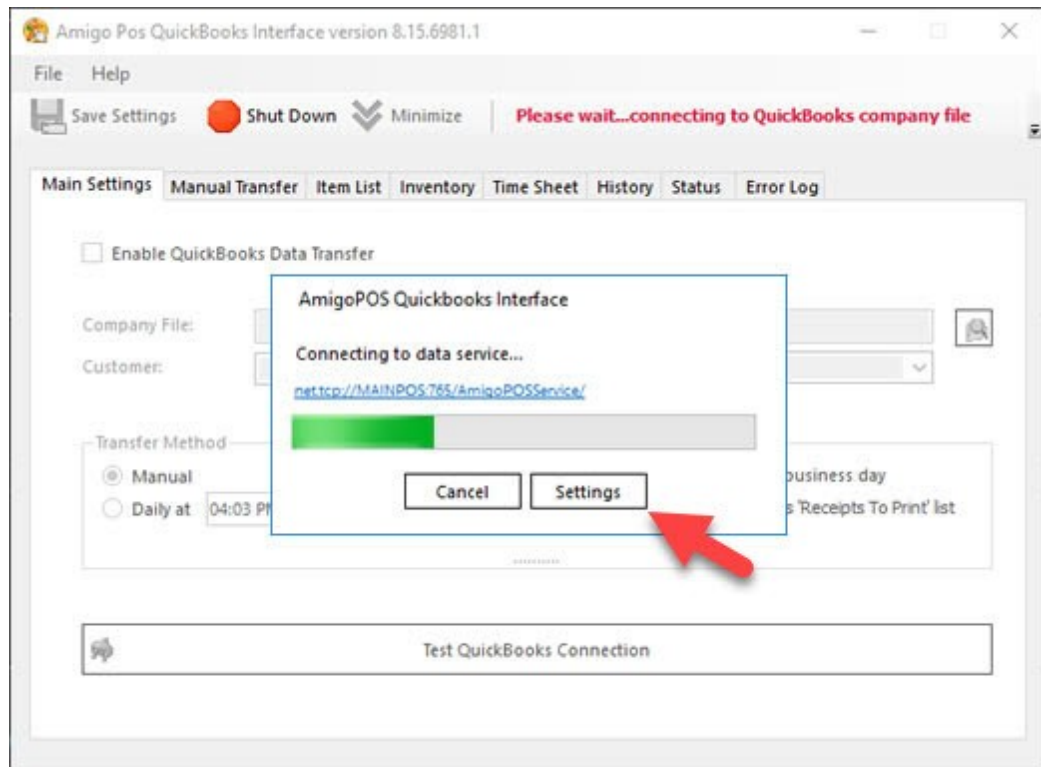
TOTAL: **0.00**

CUSTOMER MESSAGE:
 MEMO: **1/18/2019 6:00 - 1/19/20...**

Buttons: **Save & Close** **Save & New** **Revert**

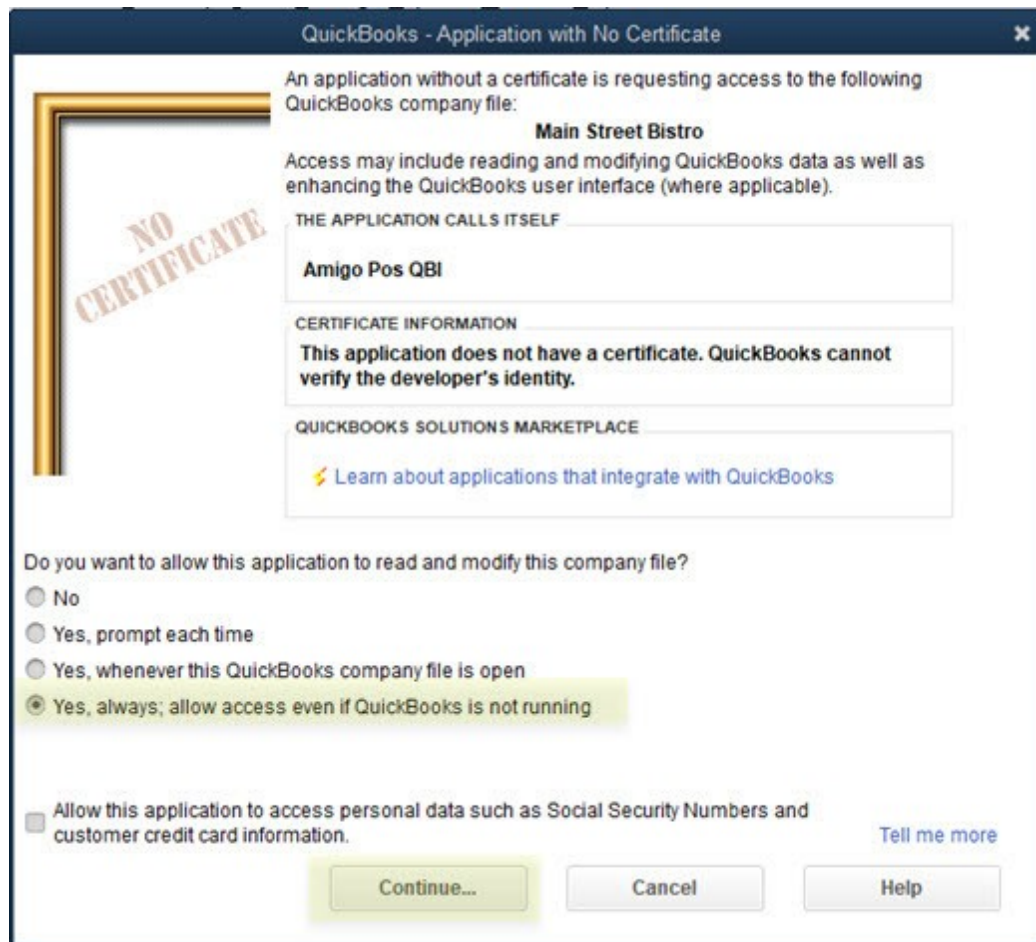
31.1.2 Installation

1. The AmigoPOS Quickbooks interface is installed with AmigoPOS.
2. Verify that the AmigoPOS Data Service application is running at the main pos station.
3. Start QuickBooks.
4. Start the AmigoPOS QuickBooks interface from the desktop shortcuts/Utilities folder on the same computer as Quickbooks and click the Settings button. Enter the name of the computer where the data service is running. Click Save and allow a few moments for the AmigoPOS Quickbooks interface to connect to the AmigoPOS Data Service application.
5. Click the Main Settings tab in the AmigoPOS Quickbooks interface and check the box next to **Enable QuickBooks Data Transfer**. A delay of 10-30 seconds is possible while the AmigoPOS Quickbooks interface attempts to connect to Quickbooks. This delay is normal and will occur whenever the AmigoPOS Quickbooks interface 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 Quickbooks interface.
6. Read the following help topics to configure the Quickbooks item list and other settings

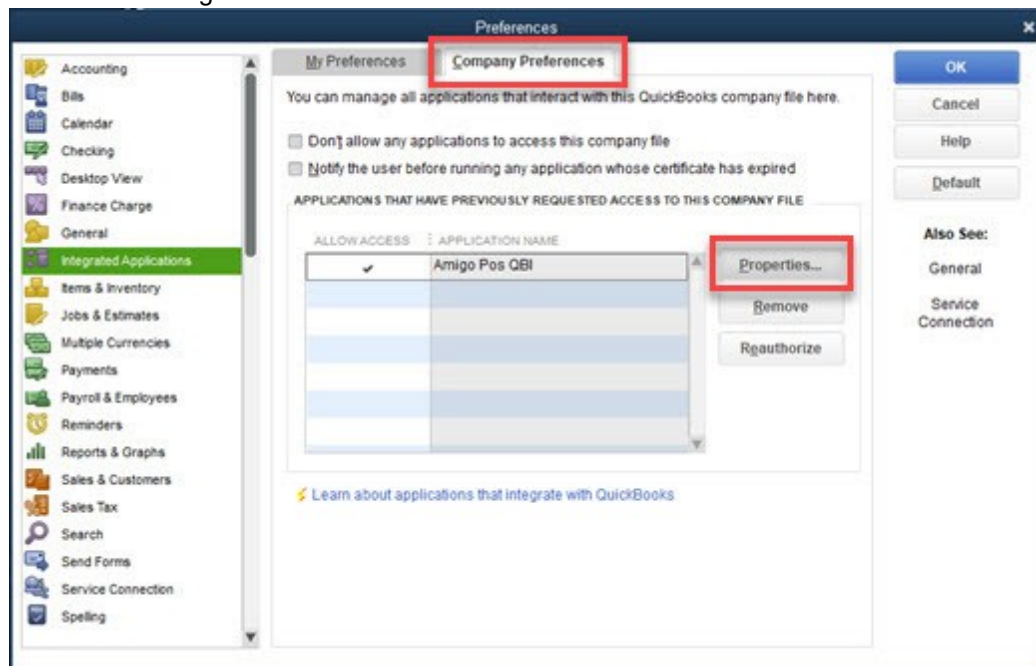


Permissions

The application must be given permission to interact with Quickbooks. Start the AmigoPOS Quickbooks interface 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.



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.



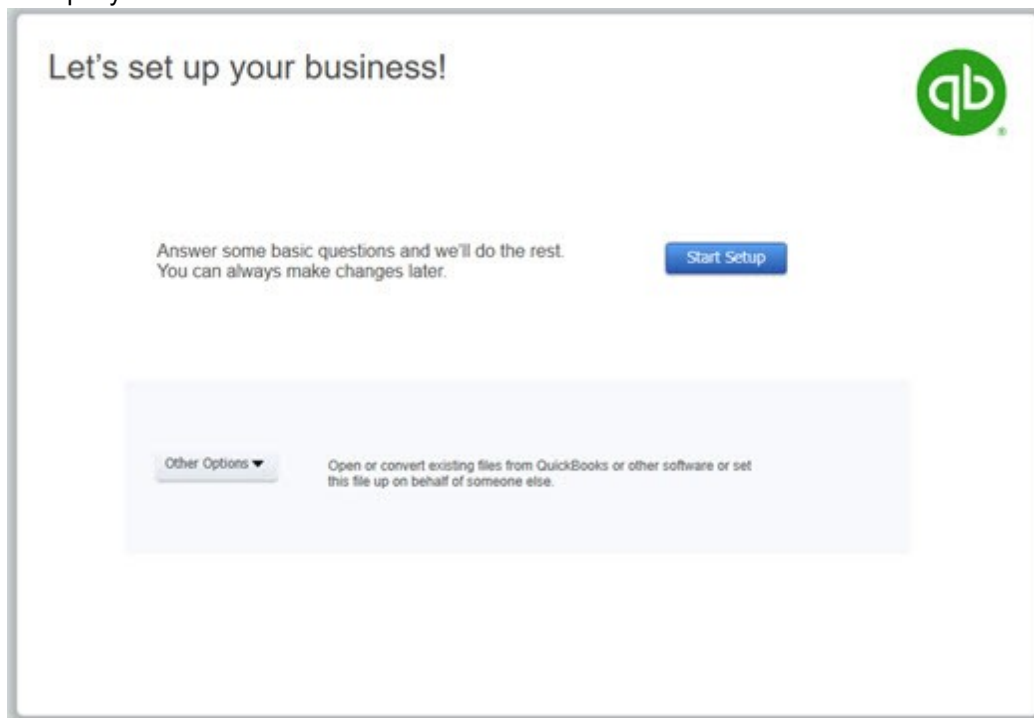
Startup

Click the AmigoPOS Quickbooks interface 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 Quickbooks interface requires 10 to 30 seconds initial startup, depending on 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.

31.1.3 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 **Start Setup**, specify the organization type and the company file is created with no items and few accounts.



At minimum, enter the business name, industry (Restaurant, Caterer or Bar), select the business type and click **Create Company** to continue. Allow a few moments for Quickbooks to create the new company file.

Glad you're here!

Tell us about your business so we can give you the right tools for what you do

SIGN IN ADD INFO FINISH

* Business Name Main Street Bistro

* Industry Restaurant, Caterer, or Bar Help me choose

* Business Type Sole Proprietorship Help me choose

Employer Identification Number (EIN) 12-3456789

Business Address

City

State FL ZIP 33132

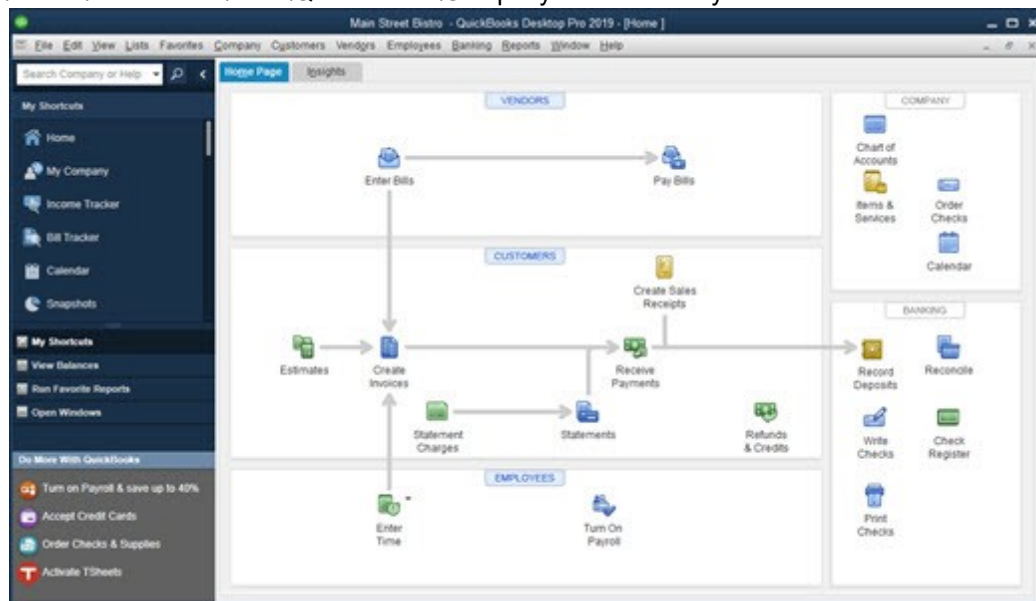
Country U.S.

Phone

Back Create Company

* Required
Intuit's Privacy Statement

Note that Quickbooks stores the company file in the C:
\\Users\\Public\\Documents\\Intuit\\QuickBooks\\Company Files directory.



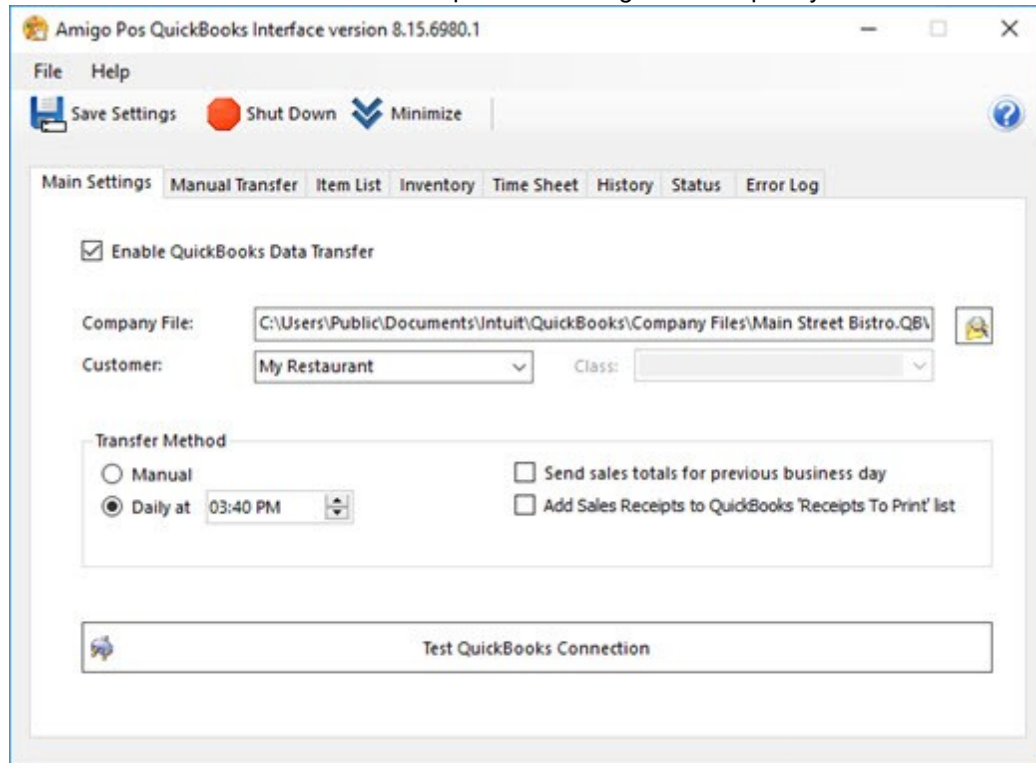
31.2 Settings

31.2.1 Overview

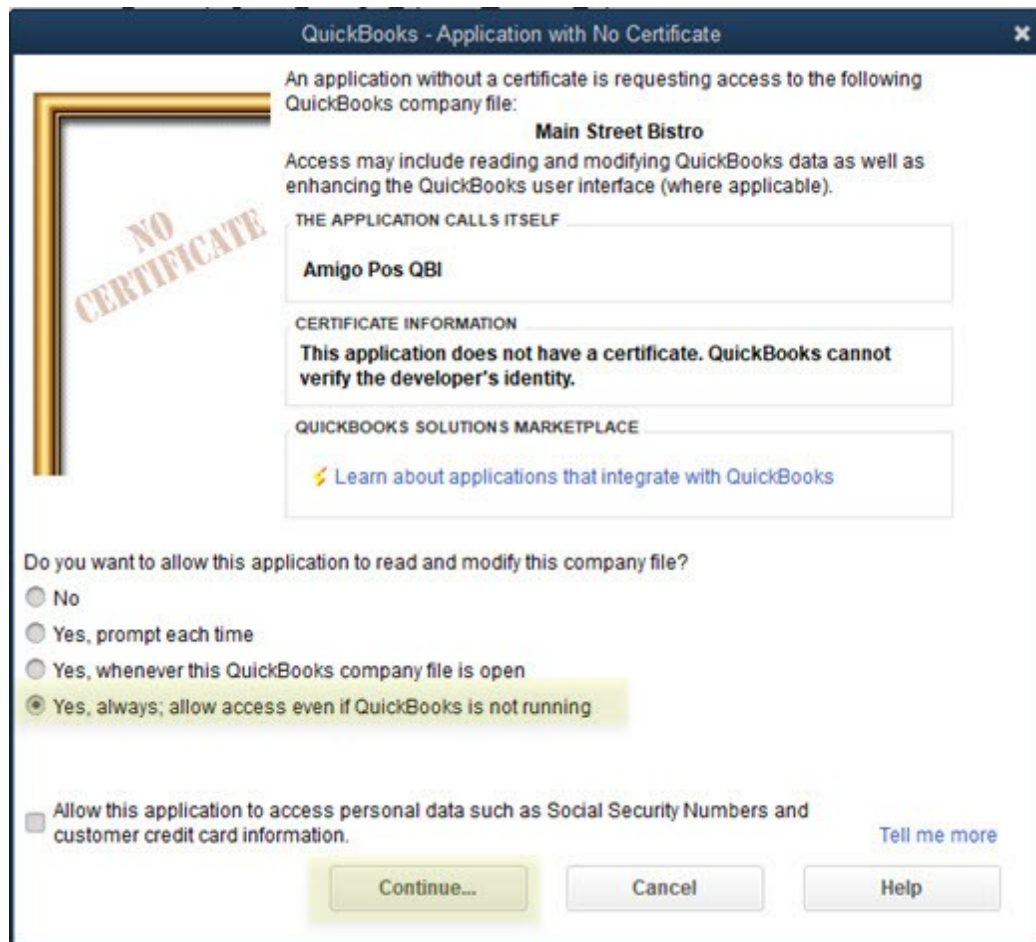
The AmigoPOS Quickbooks interface settings must be configured to work with your existing QuickBooks company file. The QuickBooks company file is a database that contains all company settings and sales data. This file is created the first time Quickbooks is run after installation, or by clicking **File - New Company...** on the top menu bar in the QuickBooks user interface. Run the AmigoPOS Quickbooks interface on the computer where Quickbooks is installed. Click the browse button at the right of the Company File field and navigate to and select the company file.

Note that in some cases Windows may prevent the selection of the company file by displaying the File In Use dialog, in which case the company file path can be entered manually, i.e. C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\MyCompanyFileName.QBW. Click Test QuickBooks connection in the AmigoPOS Quickbooks interface.

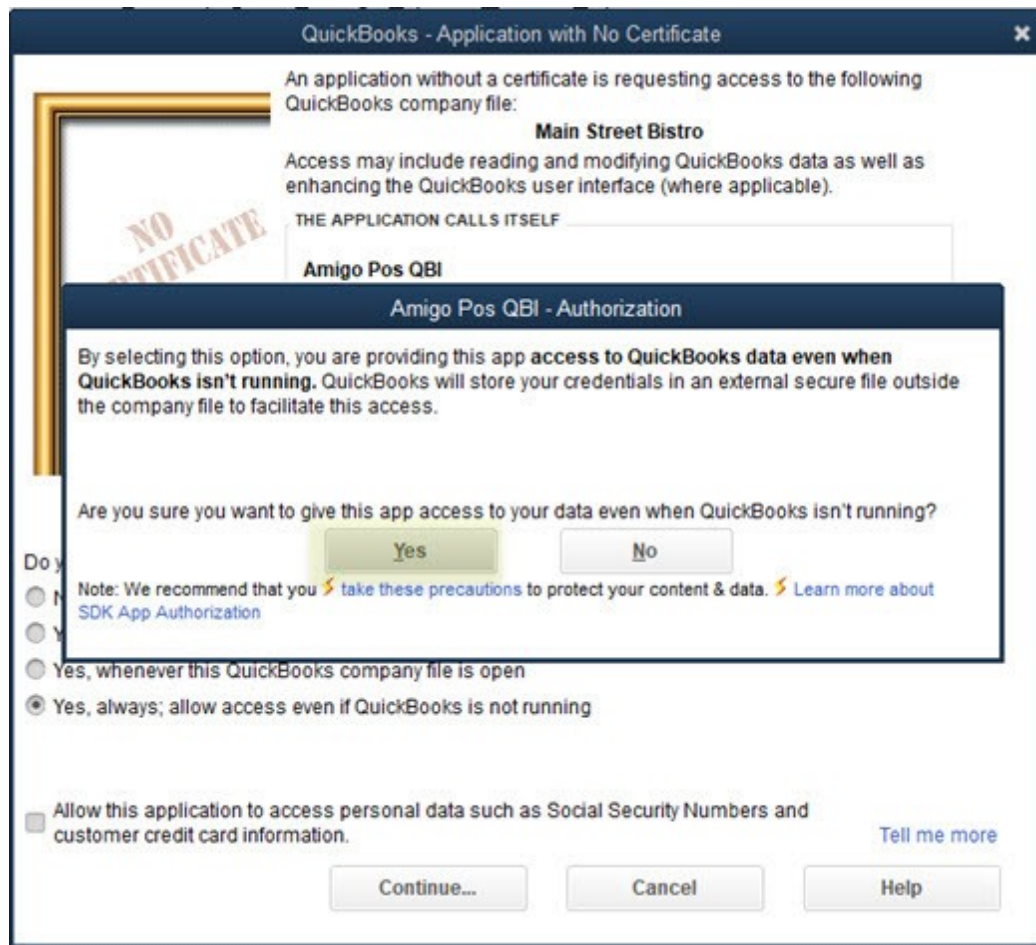
Note: Ensure that the blue **Save** button at the top left is pressed after any changes are made or the AmigoPOS Quickbooks interface will use the previous settings to attempt any transfers.



Quickbooks will prompt for permission to access the QuickBooks company file. Select Yes, always allow access... and click Continue.



Click Yes to confirm. AmigoPOS Quickbooks interface can now access the company file, even when Quickbooks is not running.



Explanation of Fields

QuickBooks Company File

The AmigoPOS Quickbooks interface 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 Quickbooks interface 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 (optional)

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](#)⁷³⁵ 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 QuickBooks Data Transfer** 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.

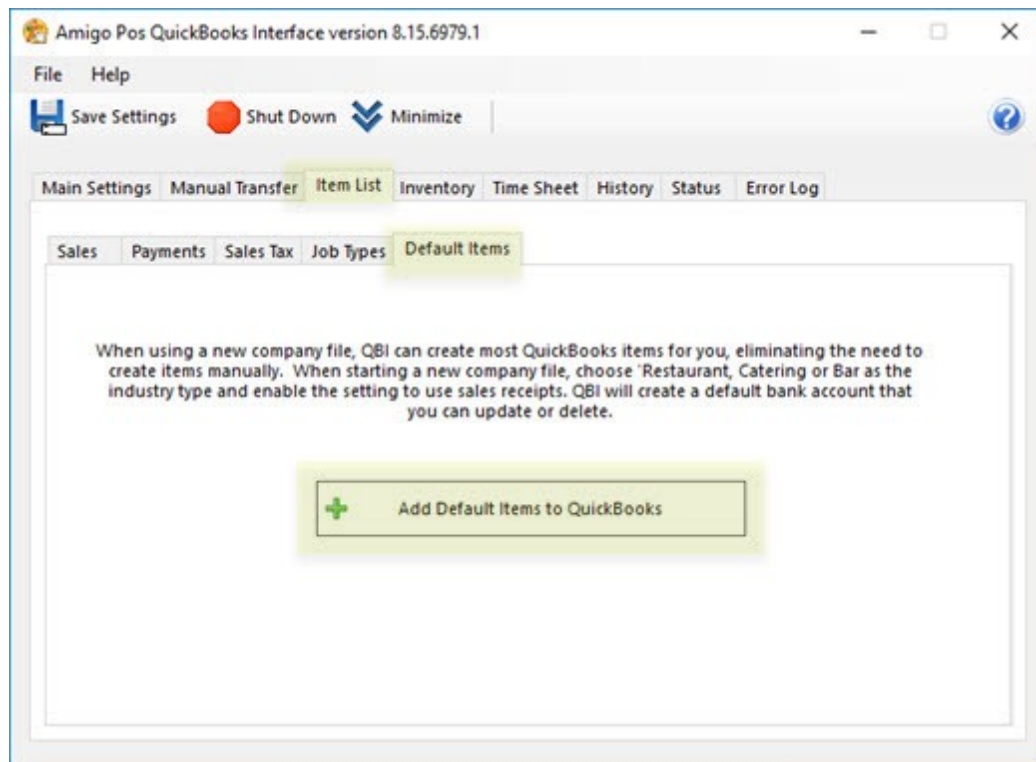
If the **Add New Employees to QuickBooks before each update** setting is not enabled, time sheet data for new employees will be rejected by QuickBooks.

31.2.2 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.

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, running this function multiple times will have no effect.



The following item types must be configured in Quickbooks before the AmigoPOS Quickbooks interface can transfer sales data:

[Sales Items](#) ⁷³⁶

[Payment Items](#) ⁷³⁶

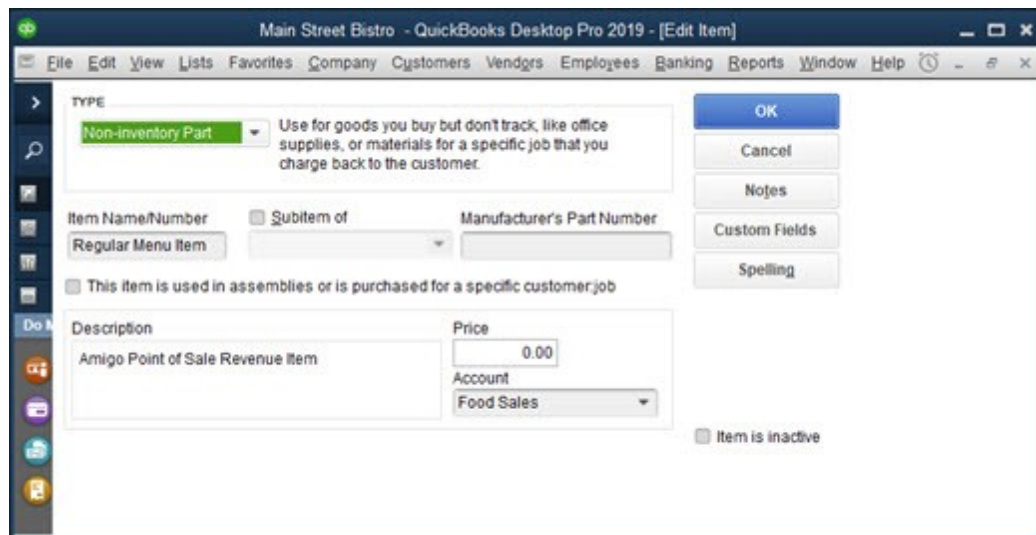
[Sales Tax Items](#) ⁷³⁷
[Discount Item](#) ⁷³⁸
[Cash Payout Item](#) ⁷³⁹
[Cash Discrepancy Item](#) ⁷³⁹
[Job Type Items](#) ⁷⁴⁰
[Inventory Items](#)

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.

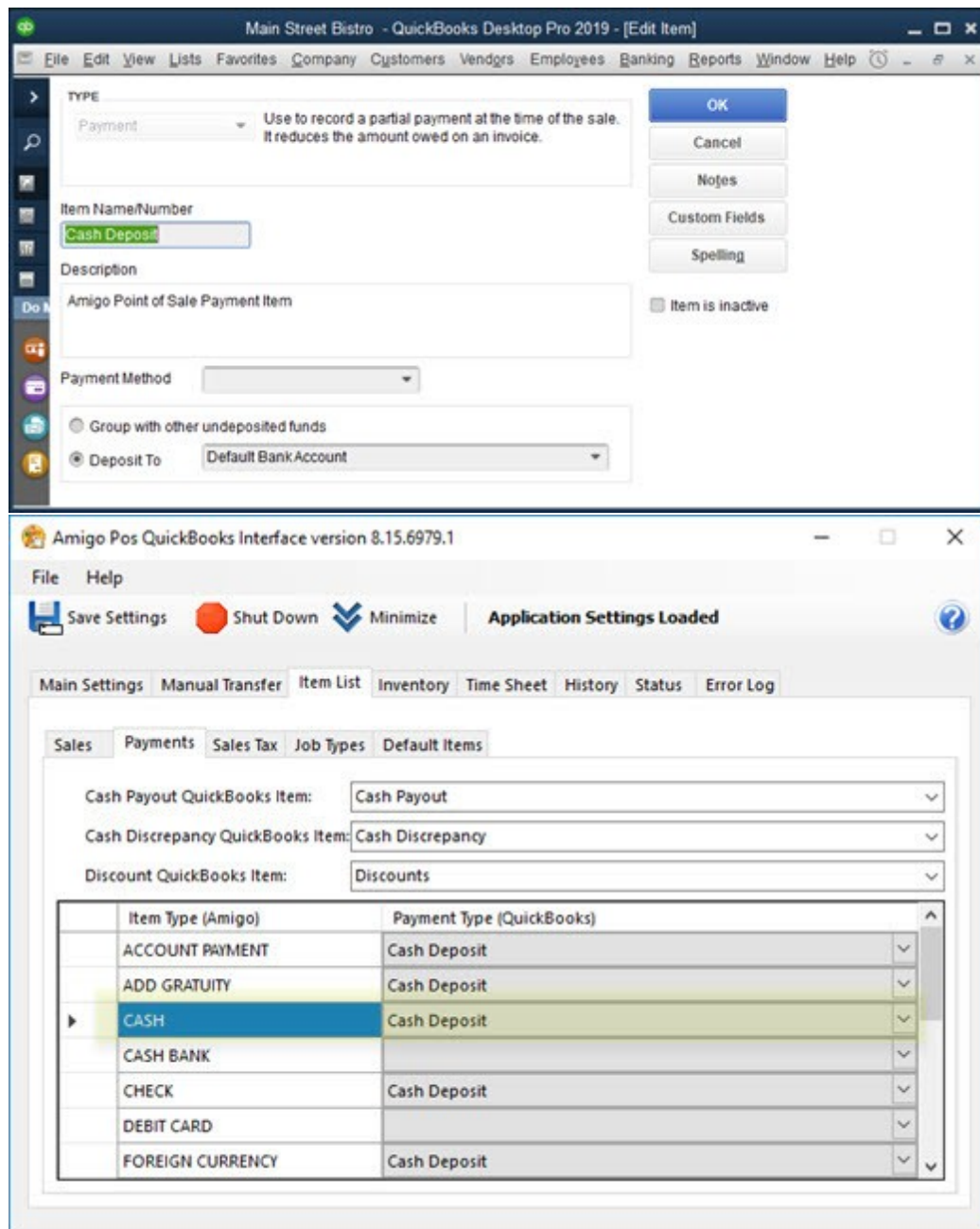


Payment Items

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 Quickbooks interface Items/Payments/Discount 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.



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](#)^[814] 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).

Sales Tax Settings

☐ 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: Normal

Select the tax rate: Tax Rate Description: SALES TAX Abbreviation

Value	Alias	Minimum	Value	Alias	Minimum	Value	Alias	Minimum
0.1000	STATE	0.00	0.0000	CITY	0.00	0.0000	-	0.00

Save Changes

Discount Item

The Quickbooks discount item is used to store the value of the sum of all order 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, enter a unique name and assign to the **Food Sales** account. Then select the new item on the AmigoPOS Quickbooks interface Items/Payments/Discount QuickBooks Item setting. Click Save Changes to update.

Main Street Bistro - QuickBooks Desktop Pro 2019 - [Edit Item]

File Edit View Lists Favorites Company Customers Vendors Employees Banking Reports Window Help

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.

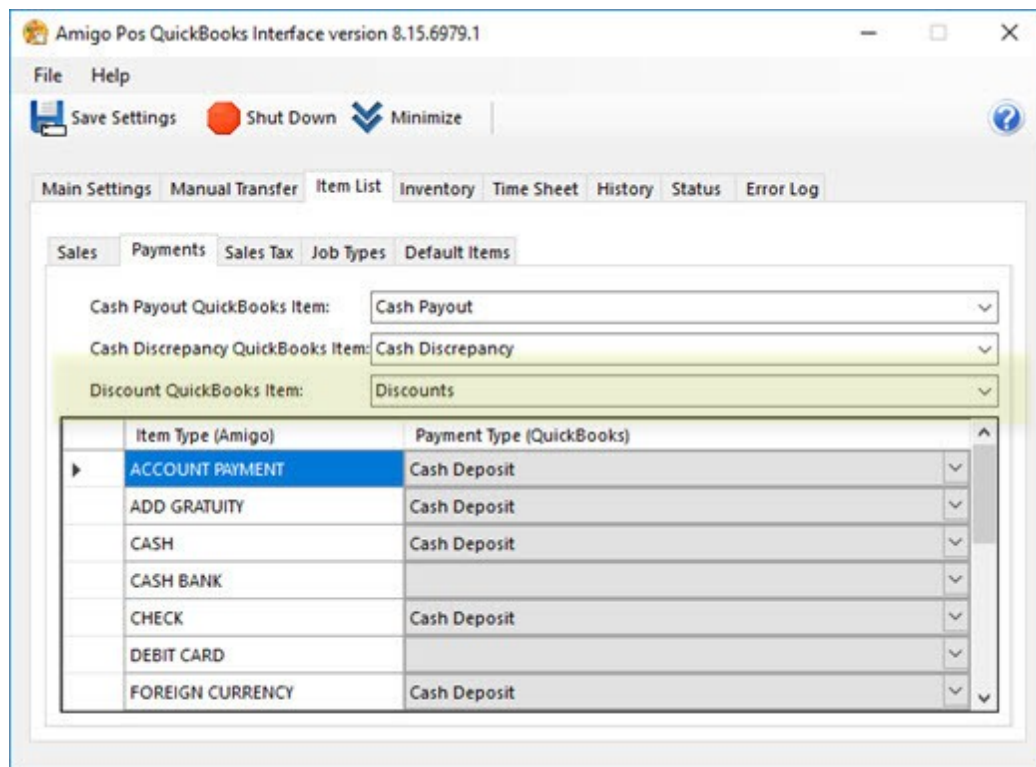
Item Name/Number Subitem of

Description Amount or %

Account

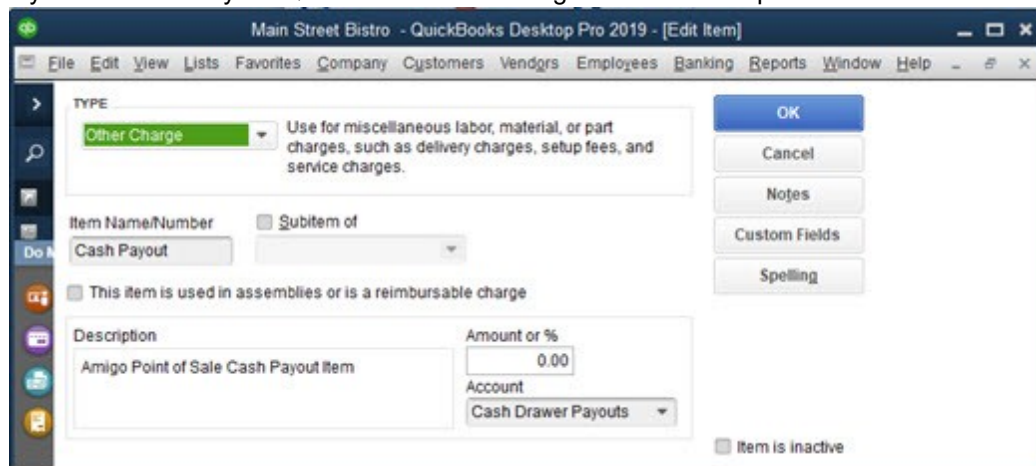
☐ Item is inactive

OK
Cancel
Notes
Custom Fields
Spelling



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, enter a unique name and assign to the **Cash Drawer Payouts** account. Then select the new item on the AmigoPOS Quickbooks interface Items/Payments/Cash Payout QuickBooks Item setting. Click Save to update.



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, enter a unique name and assign to the **Cash Over and Short** account.

Then select the new item on the AmigoPOS Quickbooks interface Items/Payments/Cash Discrepancy QuickBooks Item setting. Click Save to update.

The screenshot shows the 'Edit Item' window in QuickBooks Desktop Pro 2019. The window title is 'Main Street Bistro - QuickBooks Desktop Pro 2019 - [Edit Item]'. The menu bar includes File, Edit, View, Lists, Favorites, Company, Customers, Vendors, Employees, Banking, Reports, Window, and Help. The left sidebar has icons for Home, Search, and various reports. The main area is divided into sections: 'TYPE' with a dropdown set to 'Other Charge' and a description 'Use for miscellaneous labor, material, or part charges, such as delivery charges, setup fees, and service charges.'; 'Item Name/Number' with a text field containing 'Cash Discrepancy' and a 'Subitem of' dropdown; a checkbox for 'This item is used in assemblies or is a reimbursable charge'; 'Description' with a text field containing 'Amigo Point of Sale Cash Discrepancy Item'; 'Amount or %' with a text field set to '0.00'; 'Account' with a dropdown set to 'Cash Over and Short'; and an 'Item is inactive' checkbox. On the right, there are buttons for OK, Cancel, Notes, Custom Fields, and Spelling.

Job Type Items

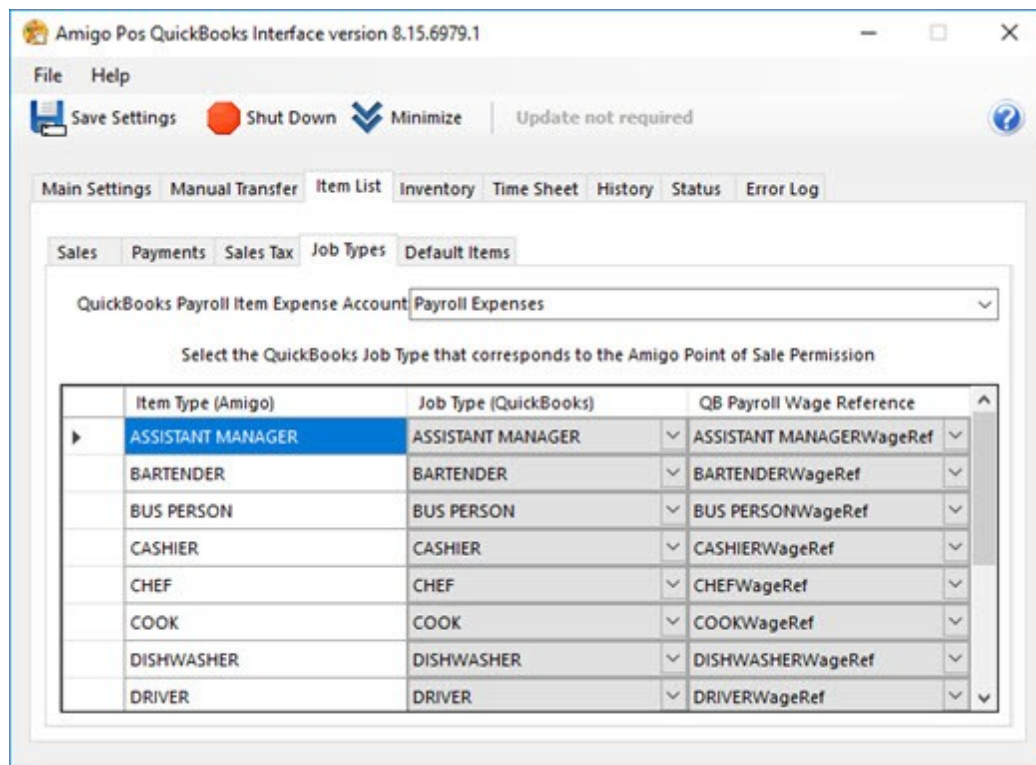
When transferring time sheet data, QuickBooks requires a service item to be associated with each employee's time sheet entry. AmigoPOS can create these

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 Quickbooks interface Items/Job Types next to each AmigoPOS permission name. Click Save to update. This step must be repeated if the AmigoPOS permissions grid is modified.

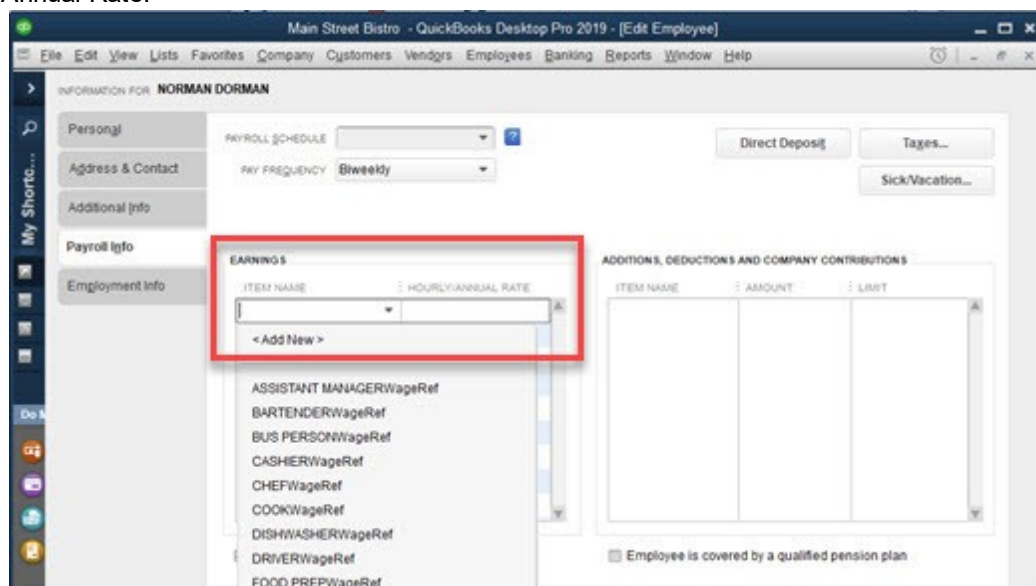
View the [Time Sheet Data](#)^[745] help topic for additional details.

The screenshot shows the 'Edit Item' window in QuickBooks Desktop Pro 2019. The window title is 'Main Street Bistro - QuickBooks Desktop Pro 2019 - [Edit Item]'. The menu bar includes File, Edit, View, Lists, Favorites, Company, Customers, Vendors, Employees, Banking, Reports, Window, and Help. The left sidebar has icons for Home, Search, and various reports. The main area is divided into sections: 'TYPE' with a dropdown set to 'Service' and a description 'Use for services you charge for or purchase, like specialized labor, consulting hours, or professional fees.'; 'Item Name/Number' with a text field containing 'GENERAL MANAGER' and a 'Subitem of' dropdown; a checkbox for 'This service is used in assemblies or is performed by a subcontractor or partner'; 'Description' with a text field containing 'Amigo Point of Sale Permission: GENERAL MANAGER'; 'Rate' with a text field set to '0.00'; 'Account' with a dropdown set to 'Payroll Expenses'; and an 'Item is inactive' checkbox. On the right, there are buttons for OK, Cancel, Notes, Custom Fields, and Spelling.

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.



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.



31.3 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.

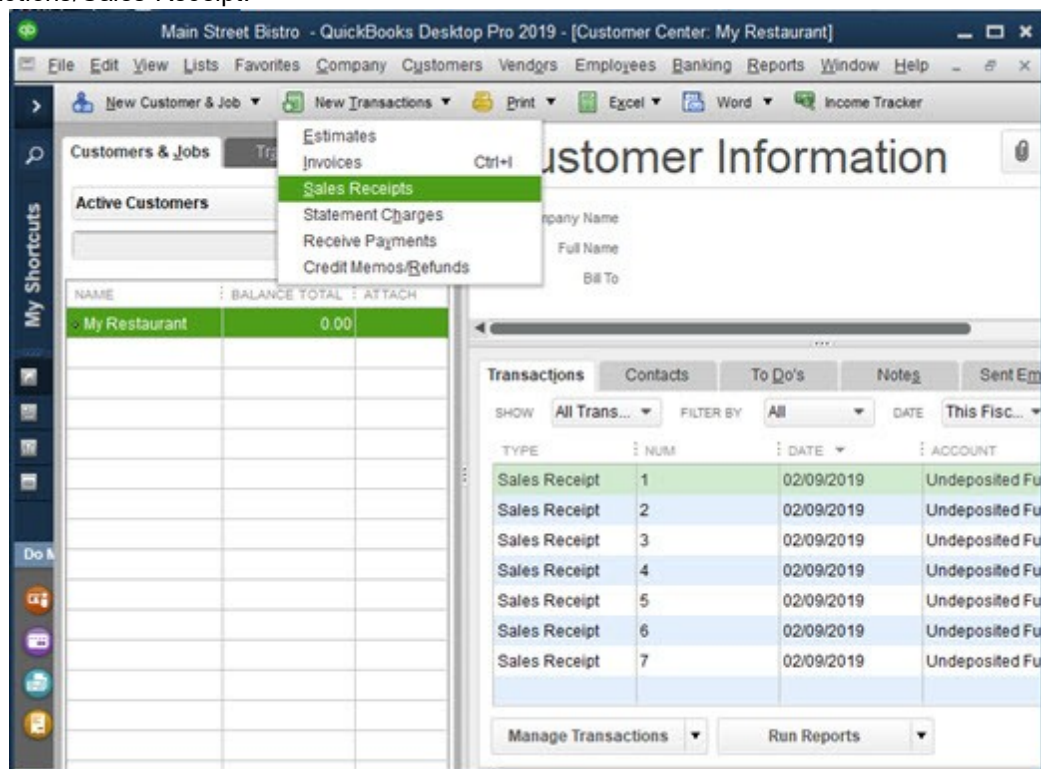
Each sales receipt contains the customer, class (if used) and date. The date does not indicate the business day for the sales data, but the date that the receipt was created. Refer to the Memo field for the exact starting and ending Date/Time used to calculate the sales data.

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 navigating to Customers/Customer Center and then select New Transactions/Sales Receipt.



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](#)⁷³⁷ 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:

Total Transactions - Total Sales + Discount Total + Paid Out Total

where Sales tax is added to total sales only if VAT tax is not used.

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.

The sales receipt is assigned a unique numeric id by QuickBooks and stored in the AmigoPOS Quickbooks interface 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.

Amigo Pos QuickBooks Interface version 8.15.6979.1

File Help

Save Settings Shut Down Minimize Update not required

Main Settings Manual Transfer Item List Inventory Time Sheet History Status Error Log

All Updates

	Start Bus Day	End Bus. Day	QB Receipt #	Status Code	Status Desc	Date/Time
<input type="checkbox"/>	1/24/2019	1/24/2019	10	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/23/2019	1/23/2019	9	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/22/2019	1/22/2019	8	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/21/2019	1/21/2019	0	0	No Sales	2/9/2019 3:50:...
<input type="checkbox"/>	1/20/2019	1/20/2019	0	0	No Sales	2/9/2019 3:50:...
<input type="checkbox"/>	1/19/2019	1/19/2019	7	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/18/2019	1/18/2019	6	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/17/2019	1/17/2019	5	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/16/2019	1/16/2019	4	0	Status OK	2/9/2019 3:50:...
<input type="checkbox"/>	1/15/2019	1/15/2019	0	0	No Sales	2/9/2019 3:50:...
<input type="checkbox"/>	1/14/2019	1/14/2019	0	0	No Sales	2/9/2019 3:50:...

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](#) ⁷⁵¹ help topic for a list of common errors.

Amigo Pos QuickBooks Interface version 8.15.6979.1

File Help

Save Settings Shut Down Minimize Update not required

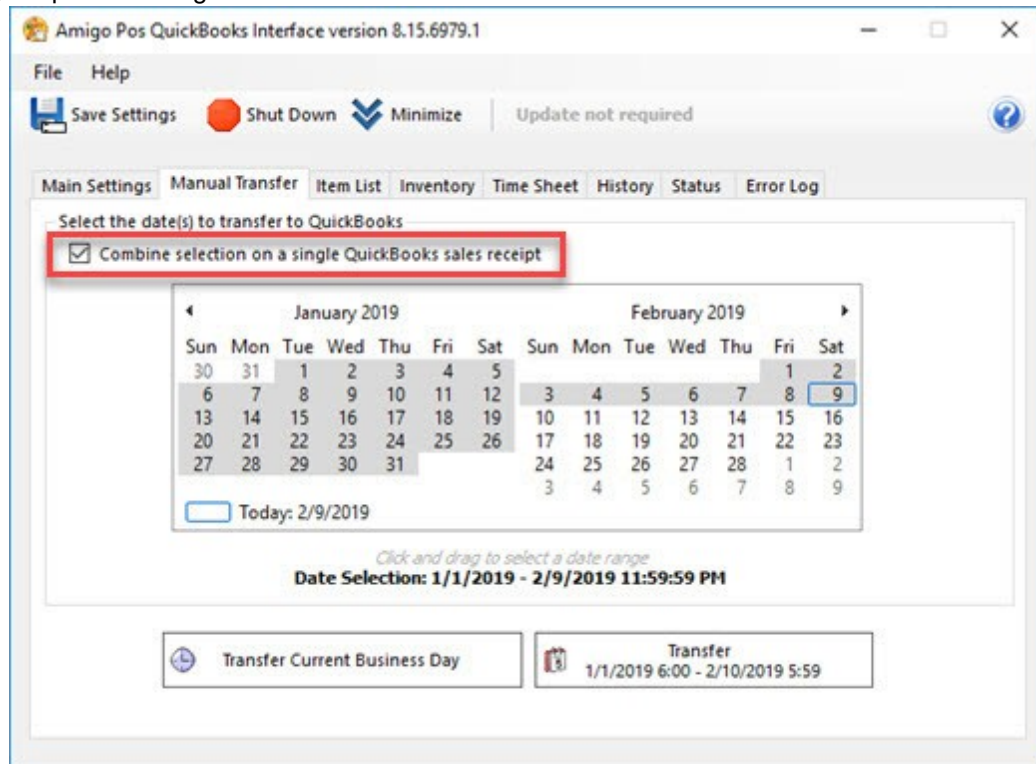
Main Settings Manual Transfer Item List Inventory Time Sheet History Status Error Log

All Updates

	Start Bus Day	End Bus. Day	QB Receipt #	Status	Status Desc	Date/Time
<input type="checkbox"/>	2/1/2019	2/1/2019	0	0	No Sales	2/9/2019 3:50:53 PM
<input checked="" type="checkbox"/>	1/31/2019	1/31/2019	0	3140	There is an invalid	2/9/2019 3:50:53 PM
<input checked="" type="checkbox"/>	1/30/2019	1/30/2019	0	3140	There is an invalid	2/9/2019 3:50:53 PM
<input checked="" type="checkbox"/>	1/29/2019	1/29/2019	0	3140	There is an invalid reference to	2/9/2019 3:50:52 PM
<input type="checkbox"/>	1/28/2019	1/28/2019	0	0	No Sales	2/9/2019 3:50:51 PM
<input type="checkbox"/>	1/27/2019	1/27/2019	0	0	No Sales	2/9/2019 3:50:51 PM
<input type="checkbox"/>	1/26/2019	1/26/2019	0	0	No Sales	2/9/2019 3:50:51 PM
<input type="checkbox"/>	1/25/2019	1/25/2019	0	0	No Sales	2/9/2019 3:50:51 PM
<input type="checkbox"/>	1/24/2019	1/24/2019	0	0	No Sales	2/9/2019 3:50:51 PM

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.

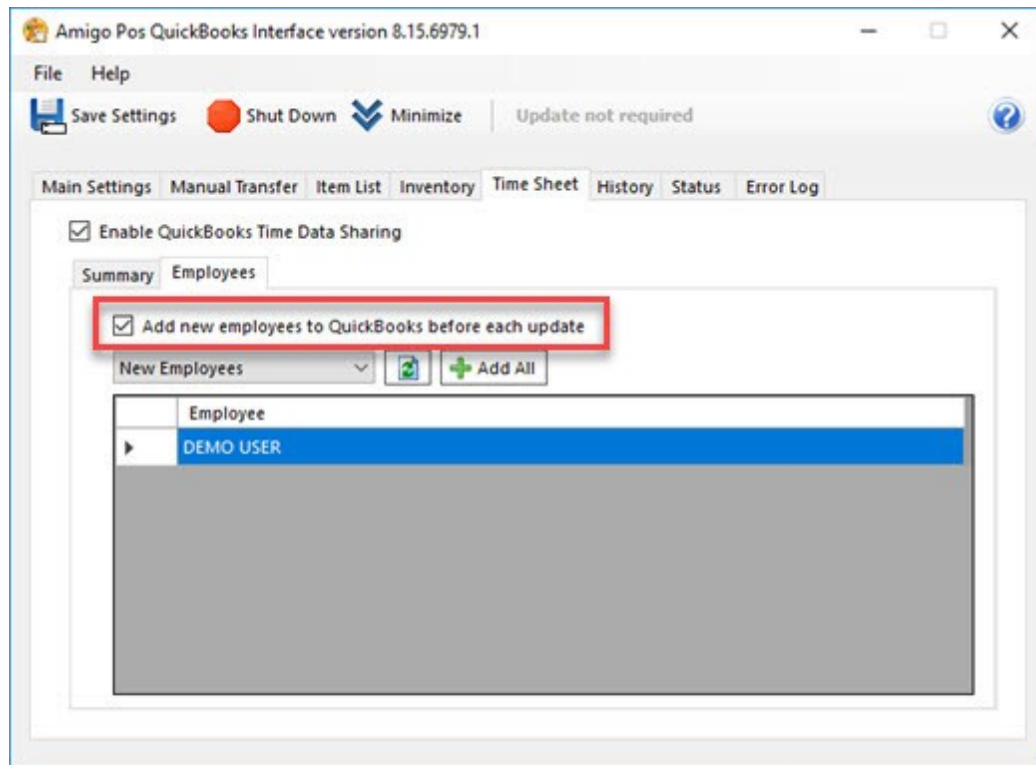
If sales data exists that has not yet been transferred to QuickBooks, click the Manual Transfer tab to specify a date or date range to transfer. Note that each transfer may take up to 2 minutes and selecting to transfer a large number of days will require sufficient time to complete. Do not use or attempt to exit the AmigoPOS Quickbooks interface while the transfer is taking place. The status log and toolbar will display frequent messages to indicate the current status of the transfer.



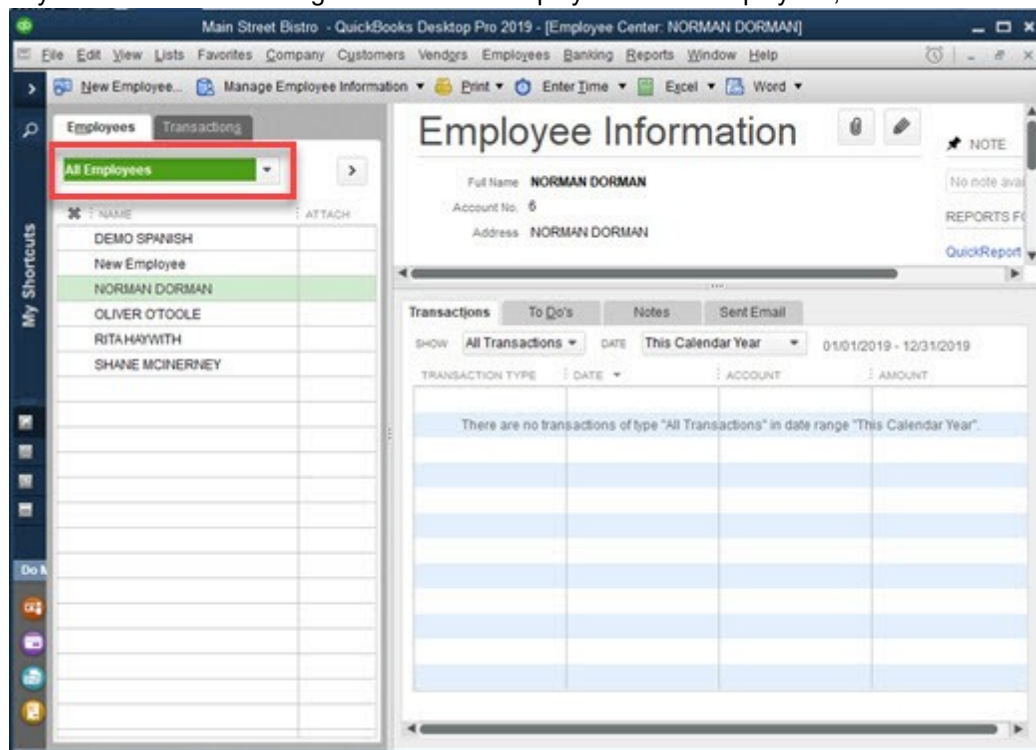
31.4 Time Sheet Data

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.

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 Quickbooks interface 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.



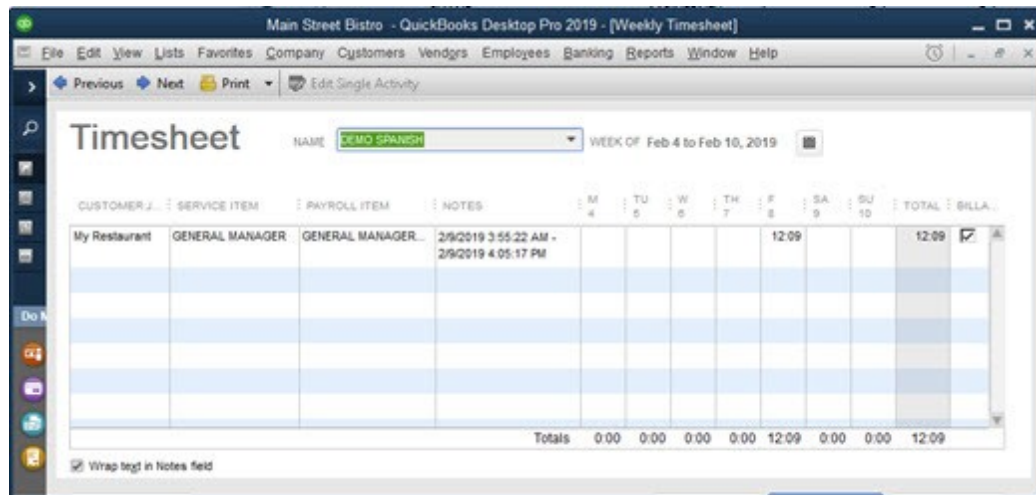
Disabled employees are added to QuickBooks with the inactive flag set to true. Inactive employees are visible only when the view is changed from Active Employees to All Employees, as shown below.



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 Quickbooks interface will also send the shift start and end times, which are listed under the Notes column.

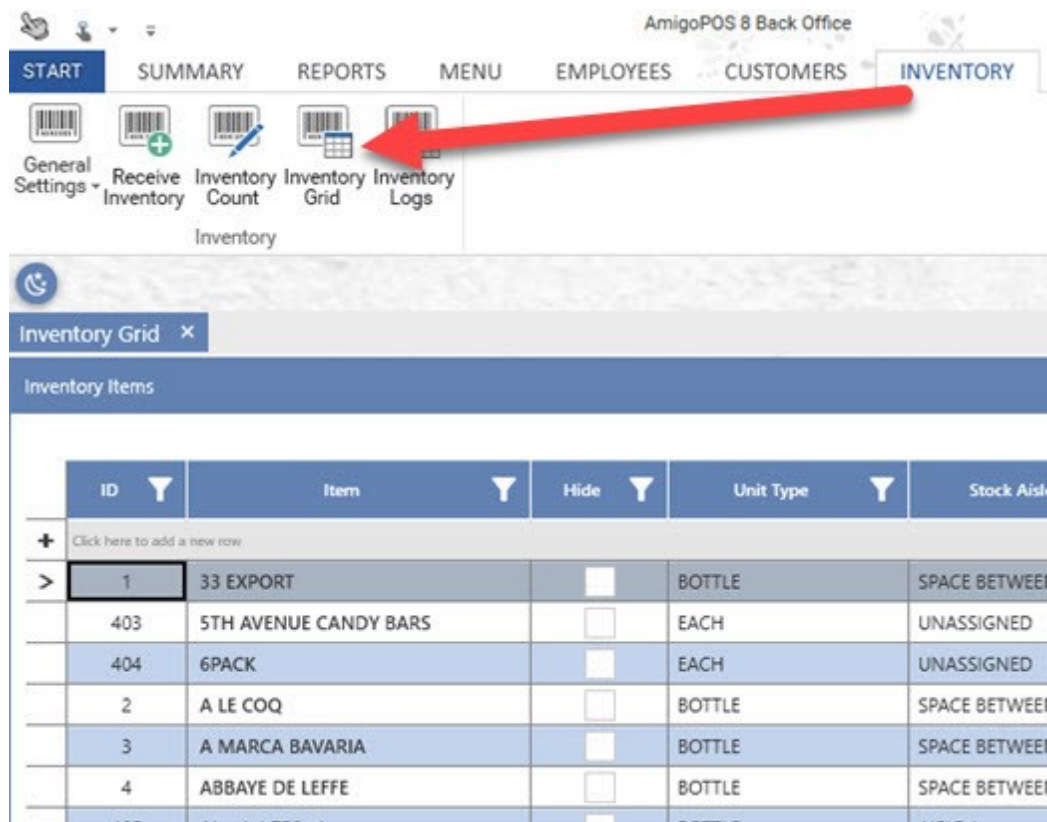
For multiple location businesses, the Customer:Job column contains a unique customer (location) name, which allows the same employee to work at multiple locations. Note that the employee name must be identical in AmigoPOS back office at each location, but should only be entered in QuickBooks once.



31.5 Inventory

AmigoPOS tracks inventory usage by deducting the amount used per each menu item based on the totals entered for the menu item recipe.

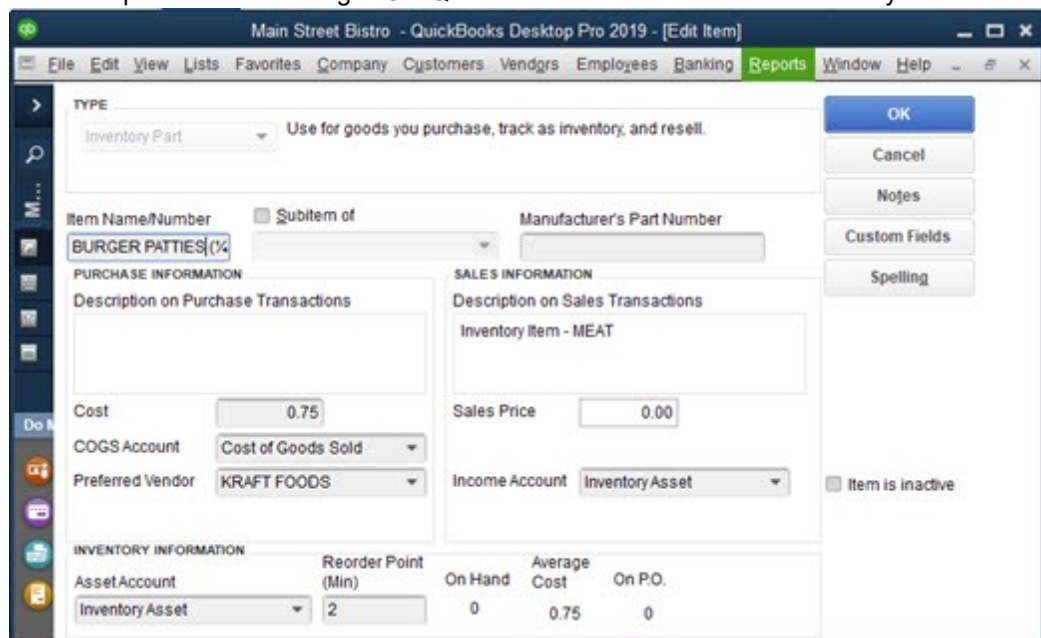
Each inventory item must be added to QuickBooks. AmigoPOS allows duplicate inventory item names, but QuickBooks uses the inventory item name as a database index and each name must be unique. This may cause issues if your inventory list in AmigoPOS contains duplicate name entries. In AmigoPOS back office, select Inventory/General Settings and verify that there are no duplicate item names.



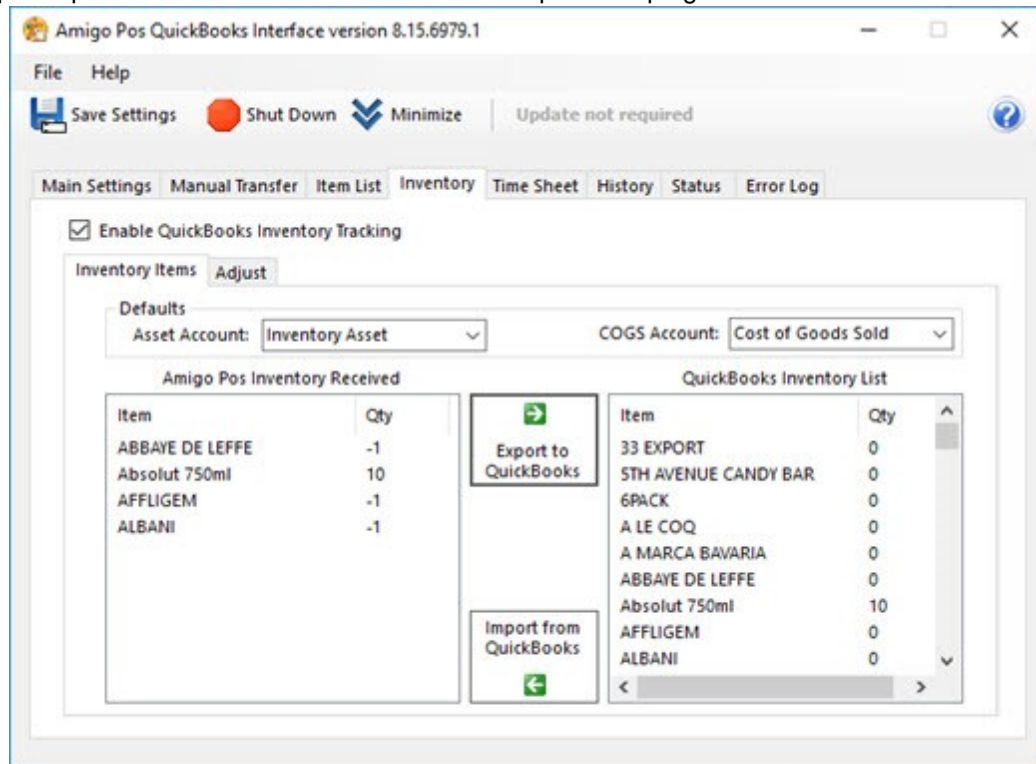
To add a new payment item to QuickBooks, open the Item List and click CTL+N. Select **Inventory Part** from the drop-down list, select the **Food Inventory** as the Asset Account, **Cost of Goods Sold** as the Income Account, **Cost of Good Sold** as the COGS Account, enter the unit quantity (not case 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 Quickbooks interface inventory exchange to function properly.

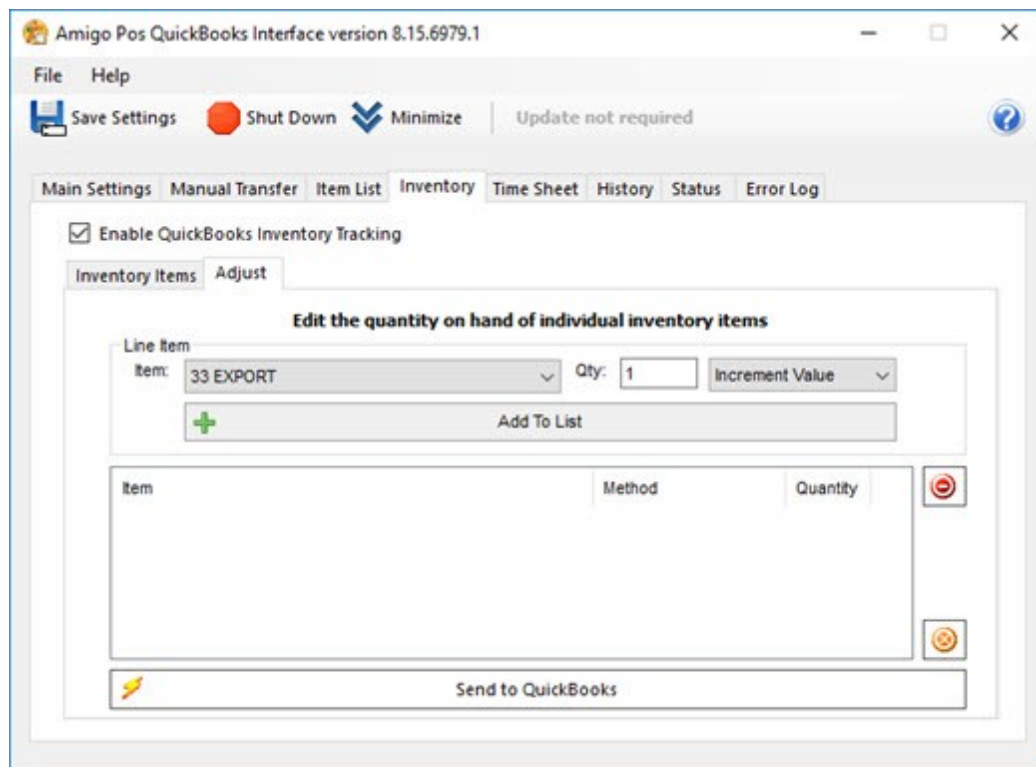
This account is specified in the AmigoPOS Quickbooks interface under the Inventory tab.



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.



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 running when this function is used, or error.



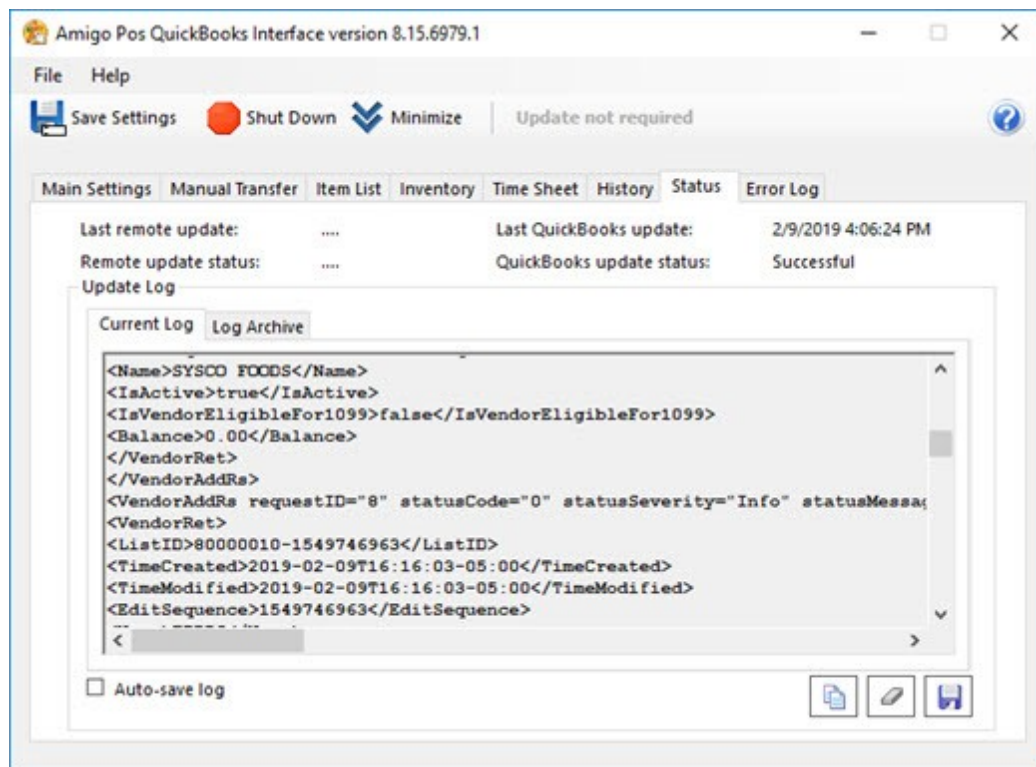
During the daily sales transfer to QuickBooks, the AmigoPOS Quickbooks interface will transfer the current business day's usage to QuickBooks so that the QuickBooks Qty on Hand value is decreased by the daily usage in AmigoPOS. When transferring sales data manually, the inventory transfer is ignored. 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.

31.6 Troubleshooting

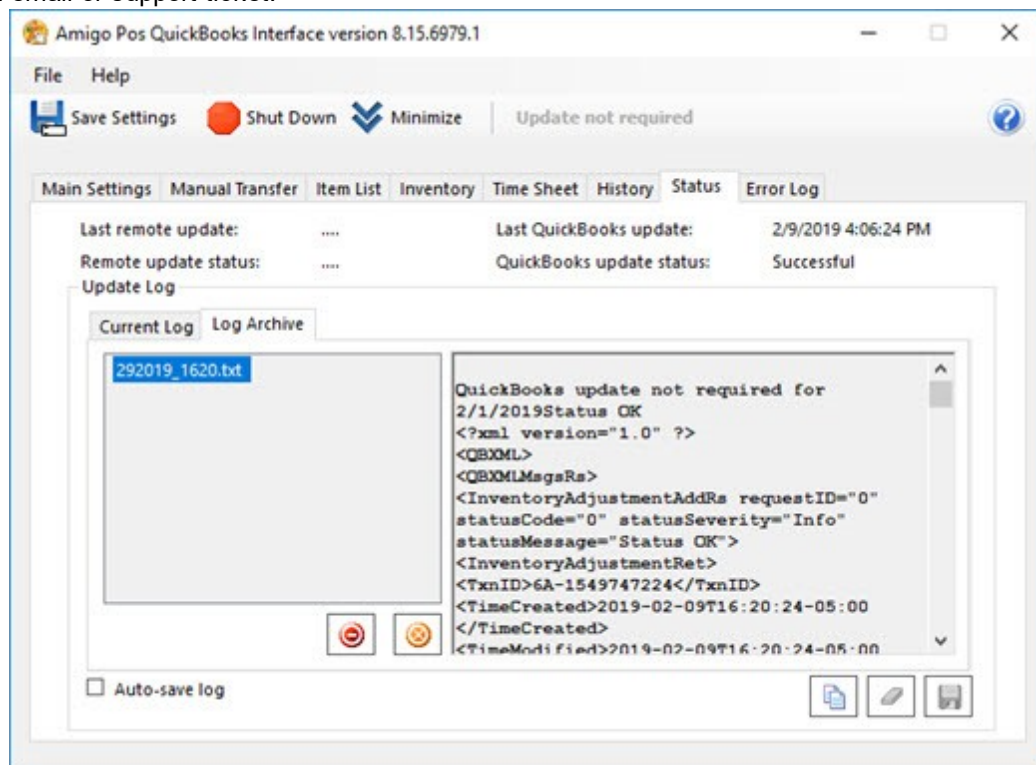
31.6.1 Overview

The AmigoPOS Quickbooks interface 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](#)^[754] 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 (x86)\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 Quickbooks interface. 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.



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.



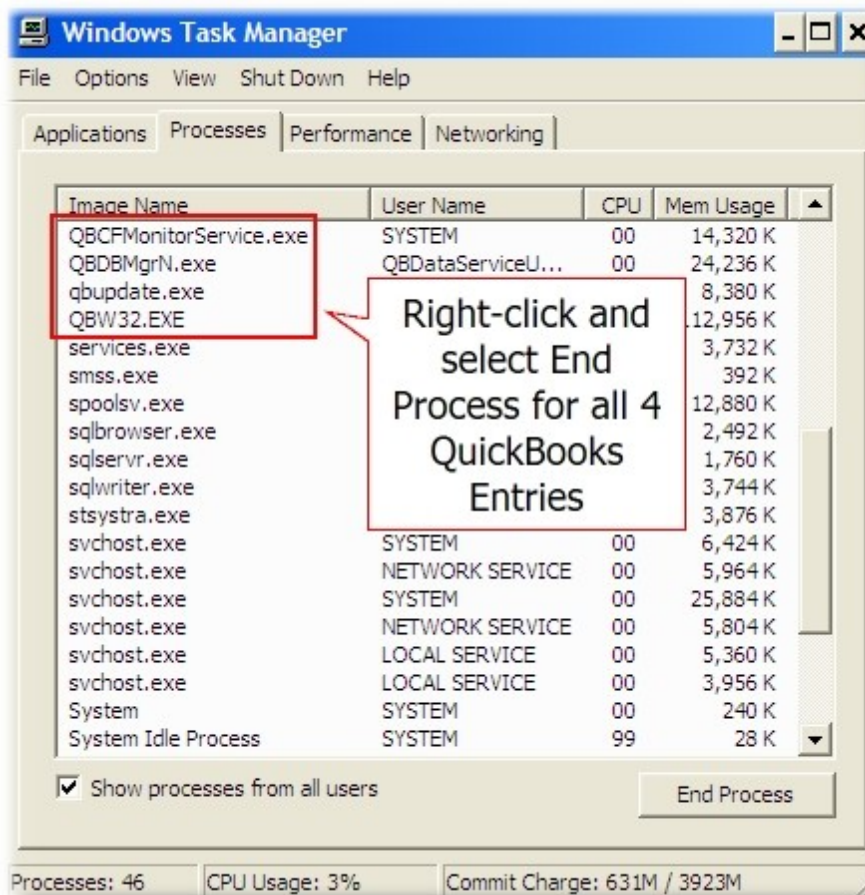
Most errors are caused by duplicate item names, non-existent items (possibly due to misspelling), or insufficient permissions granted to QBI in QuickBooks. The [QuickBooks 2008 Knowledge Base Search](#) provides a valuable source of information for QuickBooks related issues.

In the event of a serious error or if an active QuickBooks transfer is interrupted, the AmigoPOS Quickbooks interface 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 Quickbooks interface. 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

31.6.2 QBI Status Codes

Error	Meaning	Explanation
0	The QuickBooks server processed the request successfully.	Status OK
1	No match.	The filters used in the query request did not return any matching objects from QuickBooks.
500	One or more objects cannot be found	The query request has not been fully completed. There was a required element("fieldValue") that could not be found in QuickBooks.
501	Object not in this qbXML specification	Unable to represent objectName "fieldValue" in this version of the qbXML spec.
510	Object cannot be returned	Unable to return object.
530	Unsupported field	The field "fieldName" is not supported by this implementation.
531	Unsupported enum value	The enum value "fieldValue" in the field "fieldName" is not supported by this implementation.
550	Cannot save notes	The objectName object was saved successfully, but its corresponding Notes record could not be saved.
560	Deprecated field used	This field will not always be supported.
570	Cannot link to transaction	Unable to link to transaction "fieldValue" because it has already been closed.
600	No cleared state to return	(For error recovery; no message is returned.)
1000	Internal error	There has been an internal error when processing the request.
1010	System not available	System not available
1030	Unsupported message	This request is not supported by this implementation.
1060	Invalid request ID	The request ID "fieldValue" is invalid, possibly too long, max 50 chars.
3000	Invalid object ID	The given object ID "fieldValue" in the field "fieldName" is invalid.
3010	Invalid Boolean	There was an error when converting the boolean value

		"fieldValue" in the field "fieldName"
3020	Invalid date	There was an error when converting the date value "fieldValue" in the field "fieldName"
3030	Invalid date range	Invalid date range: From date is greater than To date.
3031	Invalid string range	The "From" or "To" values in the provided fieldName are invalid.
3035	Invalid time interval	There was an error when converting the time interval "fieldValue" in the field "fieldName"
3040	Invalid amount	There was an error when converting the amount "fieldValue" in the field "fieldName"
3045	Invalid price	There was an error when converting the price "fieldValue" in the field "fieldName"
3050	Invalid percentage	There was an error when converting the percent "fieldValue" in the field "fieldName"
3060	Invalid quantity	There was an error when converting the quantity "fieldValue" in the field "fieldName"
3065	Invalid GUID	There was an error when converting the GUID value "fieldValue" in the field "fieldName"
3070	String too long	The string "fieldValue" in the field "fieldName" is too long.
3080	Invalid string	The string "fieldValue" is invalid.
3085	Invalid number	There was an error when converting the number "fieldValue" in the field "fieldName"
3090	Invalid object name	There was an error when storing "fieldValue" in the "fieldName" field.
3100	Name is not unique	The name "fieldValue" of the list element is already in use.
3101	Resulting amount too large	Multiplying the rate and the quantity results in an amount that exceeds the maximum allowable amount.
3110	Invalid enum value	The enumerated value "fieldValue" in the field "fieldName" is unknown.

3120	Object not found	Object "fieldValue" specified in the request cannot be found.
3121	OwnerID not found	Data Extension Definitions specified by OwnerID fieldValue not found for this object type.
3130	Parent reference not found	There is an invalid reference to a parent "fieldValue" in the objectName list.
3140	Reference not found	There is an invalid reference to QuickBooks fieldName "fieldValue" in the objectName.
3150	Missing required element	There is a missing element "fieldName."
3151	Invalid element for request	Cannot use the element "fieldName" in this request.
3153	Element conflict in request	This error is returned whenever there is a conflict in the elements in the request. Each element has valid value, but their combination becomes invalid.
3160	Object cannot be deleted	Cannot delete the object specified by the id = "fieldValue."
3161	Cannot delete before closing date	An attempt was made to delete a fieldValue with a date that is on or before the closing date of the company. If you are sure you really want to do this, please ask a user with Admin privileges to remove the password for editing transactions on or before to closing date (this setting is in the Accounting Company Preferences), then try again.
3162	Not allowed in multi-user mode	This operation is not allowed in multi-user mode.
3170	Object cannot be modified	There was an error when modifying a fieldValue.
3171	Cannot modify before closing date	An attempt was made to modify a fieldValue with a date that is on or before the closing date of the company. If you are sure you really want to do this, please ask a user with Admin privileges to remove the password for editing transactions on or before to closing date (this setting is in the Accounting Company Preferences), then try again.
3172	Cannot modify prior to last condense	An attempt was made to modify a fieldValue with a date that is on or

		before the last inventory condensed date.
3173	Related object deleted or modified	The related fieldName transaction object fieldValue was deleted or modified.
3175	Object is in use	There was an error adding, modifying or deleting fieldValue because it is already in use.
3176	Related object is in use	The related fieldName transaction object fieldValue is already in use." // "specified by the ID" is appended to fieldValue if necessary.
3177	Duplicate AppliedToTxn IDs	The transaction object "fieldName" may only be provided once in this request.
3180	Object cannot be added	There was an error when saving a fieldValue.
3185	Object cannot be voided	Cannot void the object specified by the id = "fieldName"
3190	Cannot clear required element	Cannot clear the element in the fieldName field.
3200	Outdated edit sequence	The provided edit sequence "fieldName" is out-of-date.
3205	Invalid address	There was an error when composing an address in "fieldName"
3210	Other validation error	The "fieldName" field has an invalid value "fieldName"
3220	Not authorized operation	There is no permission to perform this request, or the feature has been turned off in QuickBooks.
3230	Status rollback	The request has been rolled-back.
3231	Status unprocessed	The request has not been processed.
3240	Time creation mismatch	Object "fieldName" specified in the request cannot be found.
3250	Feature not enabled	This feature is not enabled or not available in this version of QuickBooks.
3260	Insufficient permissions	Insufficient permission level to perform this action.
3261	Application has no sensitive data permission	The integrated application has no permission to access sensitive data.
3262	Requires payroll subscription	In order to complete this request, the company data file has to be subscribed to the Intuit Payroll Service.

3263	Not authorized for write access	This request cannot be completed because the integrated application had requested read-only access. Have the integrated application request read/write access, and have the QuickBooks administrator grant this access.
3270	Missing posting account	Missing posting account.
3280	Item type mismatch	The item "fieldValue" cannot be used in this line item. It does not have a correct type.
3290	Item line out of order	The line items in the request are in a different order than the line items in the transaction.
3300	Cannot open requested window	Could not open the requested objectName form or window.
3301	Not allowed in unattended mode	Cannot perform this request unless an interactive QuickBooks user is logged in.
3310	Unknown employee time status	Failed to save the Time Tracking transaction. The employee "fieldValue" provided in the TimeTrackingAdd request has the checkbox "Use time data to create paychecks" set to the Unknown state. Have your application ask the user whether or not to set time tracking for this employee. Then issue an EmployeeMod request to set this option to either True or False. If True, activities will be transferred to paychecks.
3320	Could not create report	The required report could not be generated.
3330	Invalid GUID for request	Cannot use the value "fieldValue" in the "fieldName" field in this request.
3340	Not allowed in data event callback	This request cannot be processed from within a data event callback procedure.
3350	Custom field list is full	Unable to define a new public data extension; the list of public extension definitions is full.
3351	Invalid type for custom field	The value or values provided for AssignToObject or RemoveFromObject may not be used for public data extension requests.

3352	Not allowed to reuse custom field	The data extension named "fieldValue" was previously defined with a different, incompatible AssignToObject. Unable to use the AssignToObject type in this request.
3360	Callback app cannot be verified	The callback application cannot be found from the CLSID or ProgID provided in the subscription request.
9001	Invalid checksum	(For error recovery; no message is returned.)
9002	No stored response found	(For error recovery; no message is returned.)
9003	Reinitialization problem	(For error recovery; no message is returned.)
9004	Invalid message ID	(For error recovery; no message is returned.)
9005	An error recovery record could not be saved	An attempt was made to save an error recovery record for a message set. The save operation failed and the record wasn't saved.
9100	Macro name not unique	The macro name "fieldValue" is already in use; it may only be defined once.
9101	Macro name too long	The macro name "fieldValue" is too long.
9102	Macro name invalid	The macro name "fieldValue" contains invalid characters.
9103	Macro substitution failure	The request was unable to use a macro value, probably due to an earlier error encountered when defining the macro.

31.6.3 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.

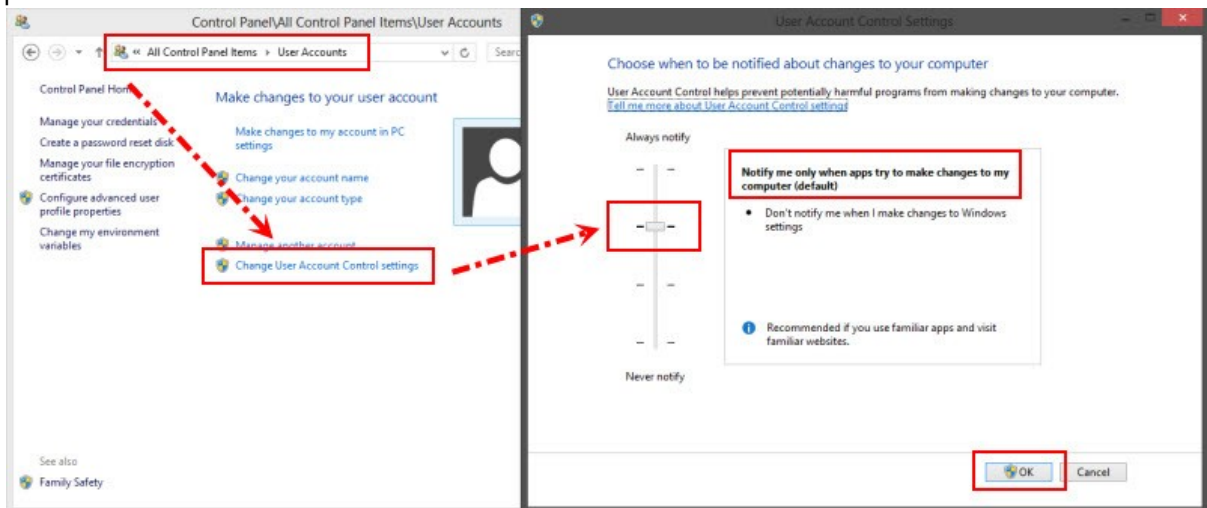
Another common error is attempting to transfer time sheet information for an AmigoPOS employee that does not exist in QuickBooks. The error code return by QuickBooks is 3140 and the error message is "There is an invalid reference to QuickBooks entity 'Max Born' in the TimeTracking. QuickBooks error message: 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.

31.6.4 Windows UAC

User Accounts/Change User Account Control Settings. QuickBooks will not communicate with integrated..." |

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 tools displays an error because Windows 8 UAC is disabled. Correct the issue, reboot and run the diagnostic tool again until all bars are green.



QuickBooks Online

32 QuickBooks Online

32.1 Overview

The QuickBooks Online interface is used to transfer sales data from the pos to QuickBooks Online. Note that the current release is in beta testing. QuickBooks Online requires a paid subscription. A 30 day free trial is available at <https://quickbooks.intuit.com>.

32.2 Access Token

QuickBooks Online uses an access token in order to authenticate the application before allowing data to be transferred from the pos to your QuickBooks Online company. The token is generated by QuickBooks Online and stored locally.

Run the QuickBooks Online shortcut from the desktop shortcuts utilities folder and click the user icon on the toolbar. Click Get Token and allow a few seconds for the connection to initialize. Enter your QuickBooks Online user id and password to sign in. Note that the user id and password are only used to sign in and are not stored locally. The confirmation screen is displayed after a successful login, indicating that QuickBooks Online has generated an access token. Click Save Token to store the token. Note that this process is only required the first time that the QuickBooks Online interface is opened. The token is automatically refreshed when the application is opened and before each data transfer.

32.3 QuickBooks Online Items

The QuickBooks Online interface uses the following item types to build the sales receipt. Each item type corresponds to an item type in the pos. Item types can be renamed for customized sales receipts and reports.

Sales Items

- regular menu item
- regular menu modifier
- bar menu item
- bar menu modifier
- misc items
- retail items
- gift card sales
- delivery charges
- carry out containers
- bottle deposit
- customer account payments

Payment Items

- cash
- check
- credit card
- debit card
- foreign currency
- gift card
- gift certificate
- customer account
- loyalty card

- manual credit
- room charge
- master card
- visa
- amex
- discover

Additional Items

- Asset Account
- Cash Disbursement
- Cash Discrepancy
- Cash Over/Short
- Cost of Goods Sold Account
- Customer
- Discount
- Payroll Expense Account
- Sales Account
- Sales Tax Group 1
- Sales Tax Group 2
- Sales Tax Group 3

32.4 QuickBooks Online Data Transfer

32.5 Troubleshooting Errors

ttt

Remote Display

33 Remote Display

33.1 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 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)

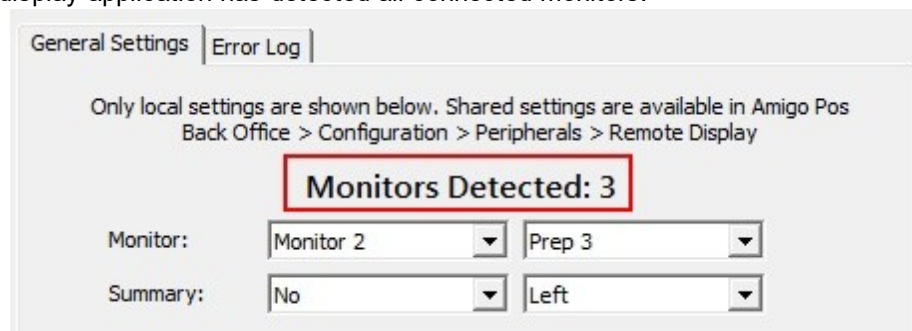
Video Card: Any integrated or external graphics card capable of driving 1 to 5 monitors.

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.

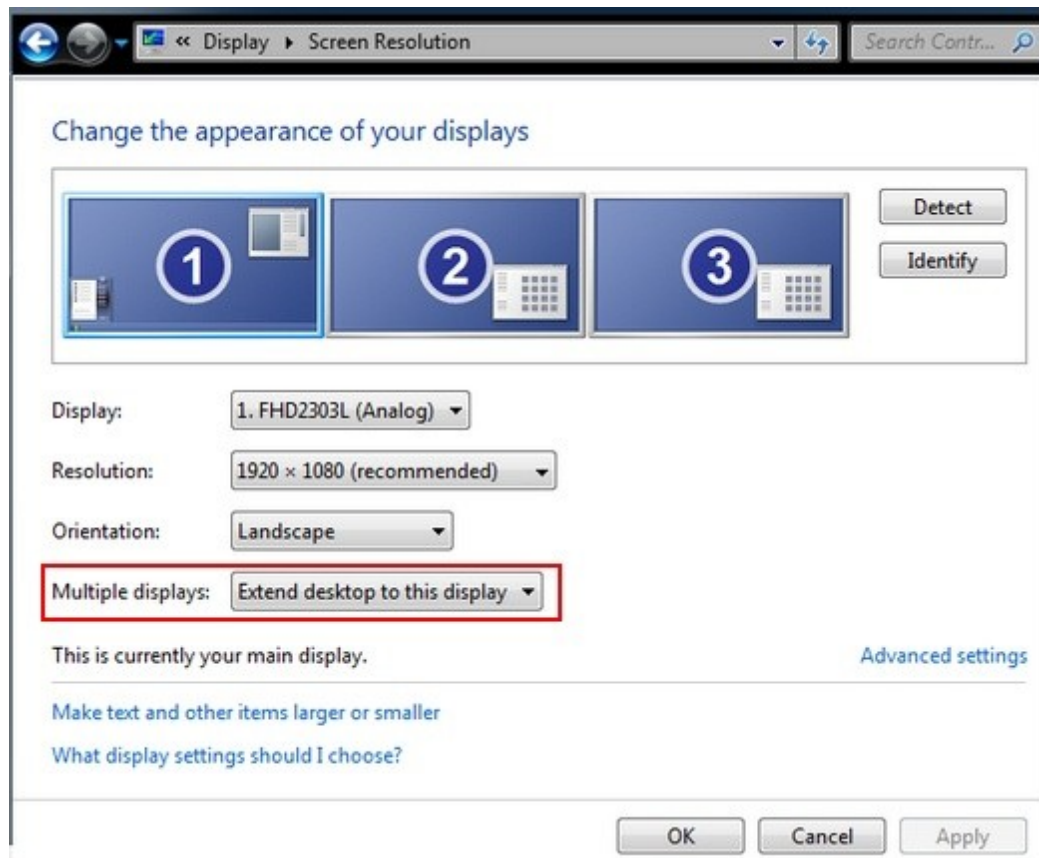
Available Monitors

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 | Devices | 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.

DEVICE SETTINGS

Select the device:
Remote Display

Additional Info:
Enable and configure the remote display application

Remote Display

Enabled	No
Late Alert Minutes	60 Minutes
Late Color	255; 0; 0
Late Text Color	255; 255; 255
Menu Item Color	255; 255; 255
Modifier Item Color	255; 0; 0
Remote Displays In Use	3
Screen Color	0; 0; 0
Screen Refresh Disable Interval	30 Seconds
Screen Refresh Interval	15 Seconds
Sound	Asterisk
Summary Color	0; 0; 0
Summary Text Color	255; 255; 255
Warning Alert Minutes	30 Minutes
Warning Color	255; 255; 0

Email SMS Trigger On Order Bumped
Specify whether to automatically send an Email and/or SMS order confirmation when an order is bumped on the remote display.

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

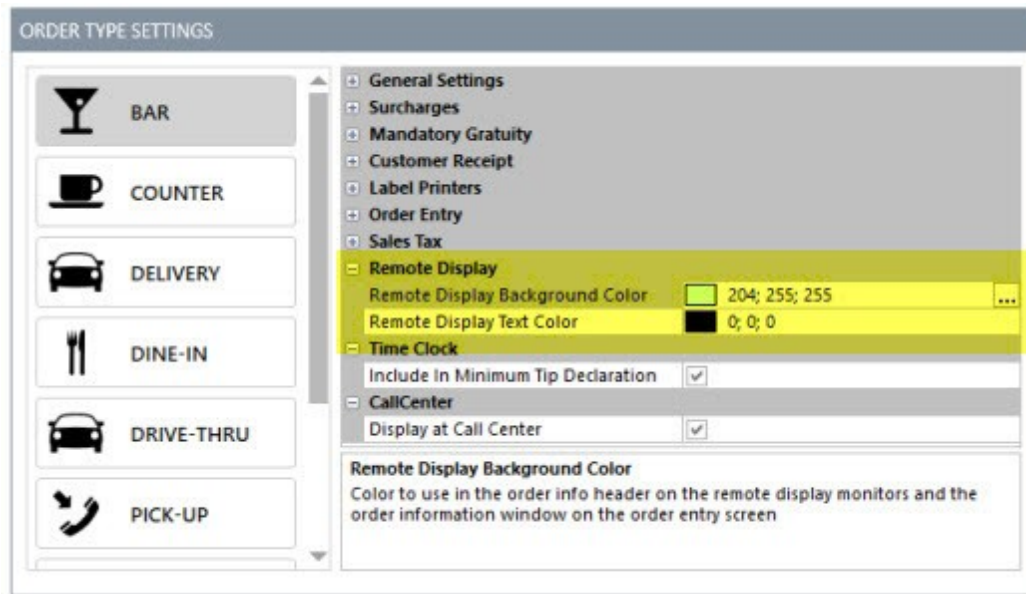
Warning Color: Yellow (shown in order #20)

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.

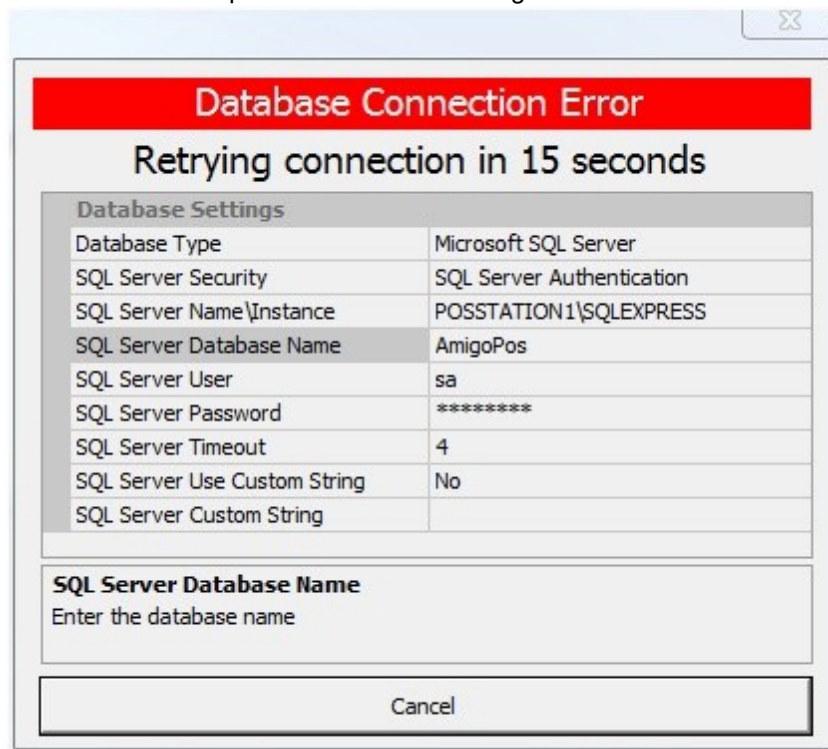
Sound: System sound to play when a new order is added to the list

In addition, each order type is assigned both a background color and text color on the [order types settings](#) 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 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.

Monitors Detected: 3

Monitor: Monitor 2 Prep 3

Summary: No Left

Order Types (requires restart)*

Remote Display Settings Screen

For example, the menu item shown in the image below is sent to any monitor designated as Prep 3.

MENU ITEMS

SALADS

Add a new menu item +

Item name contains X

VEGGIE DELITE SALAD (2)

TUNA SALAD (3)

GREEK SALAD (20)

MAIN SETTINGS

Prep Printers

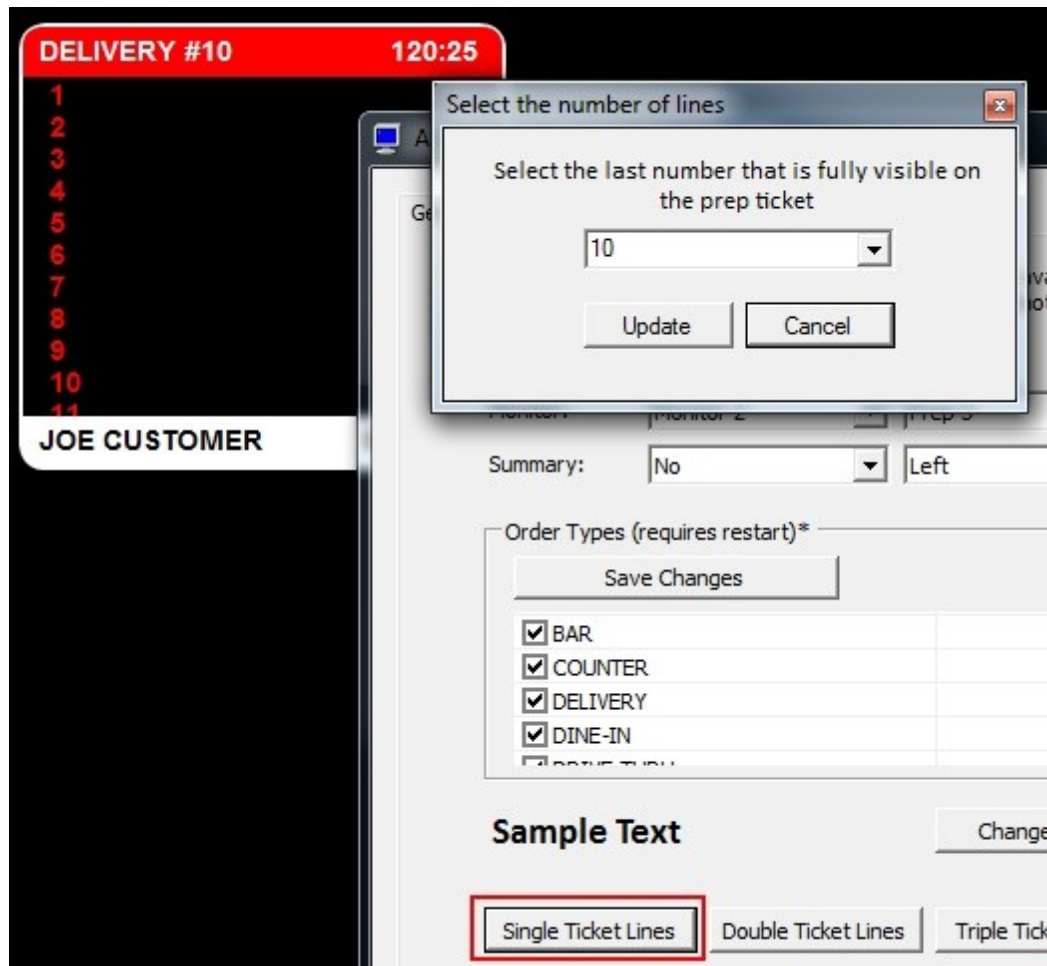
Prep Printer 1	<input type="checkbox"/>
Prep Printer 2	<input type="checkbox"/>
Prep Printer 3	<input checked="" type="checkbox"/>

Prep Printer 3

Check the box to print this menu item at Prep Printer 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](#) 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 & No Summary

33.2 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:

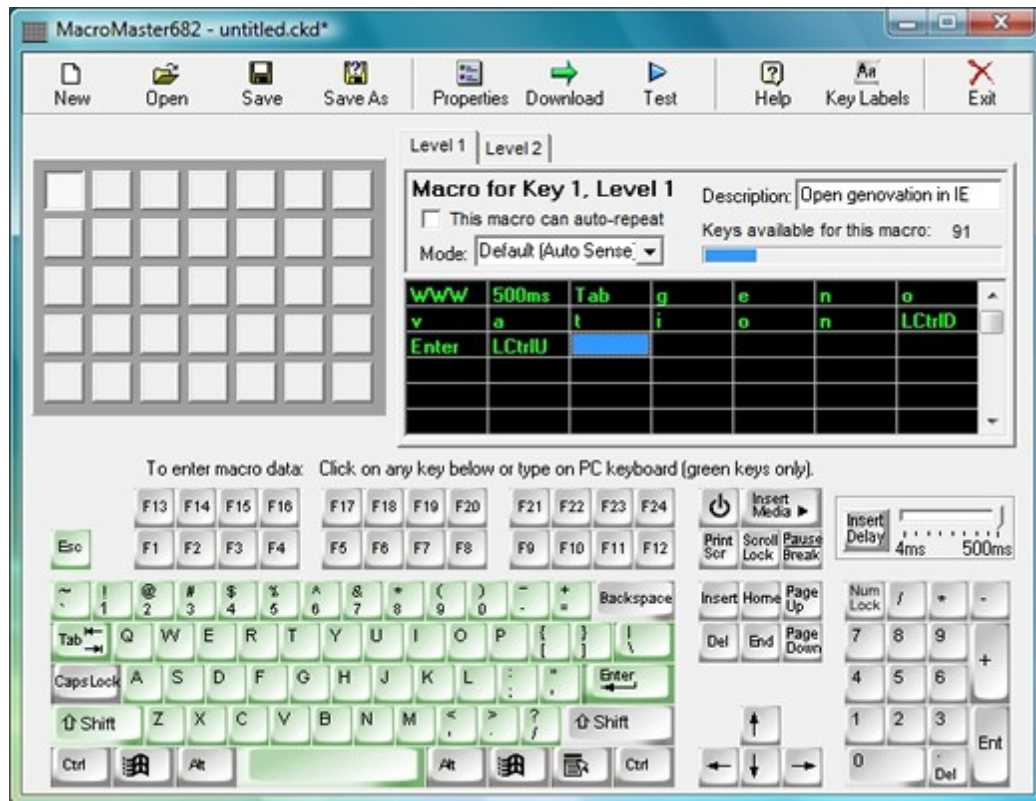
Function	Description	Monitor				
		1	2	3	4	5
Select Previous Ticket		Ctrl+Up	Ctrl+Alt+Up	Ctrl+Shift+Up	Alt+Shift+Up	Ctrl+Winkey+Up
Select Next Ticket		Ctrl+Down	Ctrl+Alt+Down	Ctrl+Shift+Down	Alt+Shift+Down	Ctrl+Winkey+Down
Bump Order	Remove the selected order from the list	Ctrl+B	Ctrl+Alt+B	Ctrl+Shift+B	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

Show Next Screen	Show the next group of orders	Ctrl+Right	Ctrl+Alt+Right	Ctrl+Shift+Right	Alt+Shift+Right	Ctrl+Winkey+Right
Show Order Details	Display the order details	Ctrl+F	Ctrl+Alt+F	Ctrl+Shift+F	Alt+Shift+F	Ctrl+Winkey+F
Refresh Screen		Ctrl+R	Ctrl+Alt+R	Ctrl+Shift+R	Alt+Shift+R	Ctrl+Winkey+R
Print Order	<i>Not yet implemented</i>	Ctrl+P	Ctrl+Alt+P	Ctrl+Shift+P	Alt+Shift+P	Ctrl+Winkey+P
Show Summary	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
Show Future Orders	Show orders that are scheduled for a future date/time					
Lock/Unlock Screen	Disable auto-refresh	Ctrl+A	Ctrl+Alt+A	Ctrl+Shift+A	Alt+Shift+A	Ctrl+Winkey+A
Show Settings		Ctrl+S	Ctrl+Alt+S	Ctrl+Shift+S	Alt+Shift+S	Ctrl+Winkey+S
Shut Down						
Select Order 1-12	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

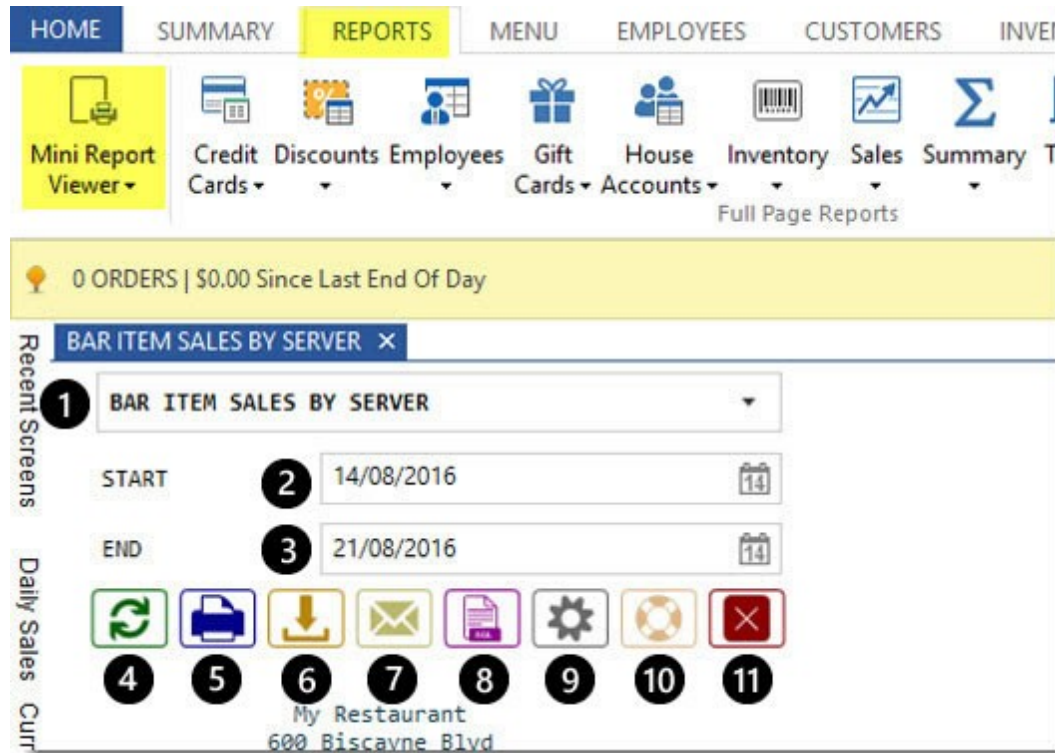
By default, orders are first selected with a single keystroke, then bumped with a second single keystroke. Some users may wish to program a macro that sends the Select and Bump commands with a single keystroke, but allows the user to select the order (without bumping) by pressing Shift followed by pressing 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.

Reports

34 Reports

34.1 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**⁴²³. 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, 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](#) ⁷⁸¹
[Credit Card Gratuities](#) ⁷⁸¹
[Credit Card Transactions](#) ⁷⁸²
[Deliveries By Driver](#) ⁷⁸²
[Inventory Usage](#) ⁷⁸²
[Item Sales By Type](#) ⁷⁸²
[Low Inventory \(Actual\)](#) ⁷⁸²
[Low Inventory \(Estimate\)](#) ⁷⁸²
[Non Cash Gratuities](#) ⁷⁸²
[Non Cash Gratuities Detail](#) ⁷⁸³
[Open PreAuth](#) ⁷⁸³
[PLU List \(By Name\)](#) ⁷⁸³
[PLU List \(By PLU\)](#) ⁷⁸³
[Sales By Hour](#) ⁷⁸³
[Sales By Item Type](#) ⁷⁸³
[Sales By Order Type](#) ⁷⁸³
[Sales By Server](#) ⁷⁸³
[Sales By pos station](#) ⁷⁸³
[Server Banking](#) ⁷⁸⁴
[Order Voids](#) ⁷⁸⁴
[Time Sheet Activity](#) ⁷⁸⁴

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 **Exclude Bartenders From Bar Sales Report** (to ignore bar item sales by bartenders) and **Include Tax In Bar Sales Report**, 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](#) ⁷⁸² 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.

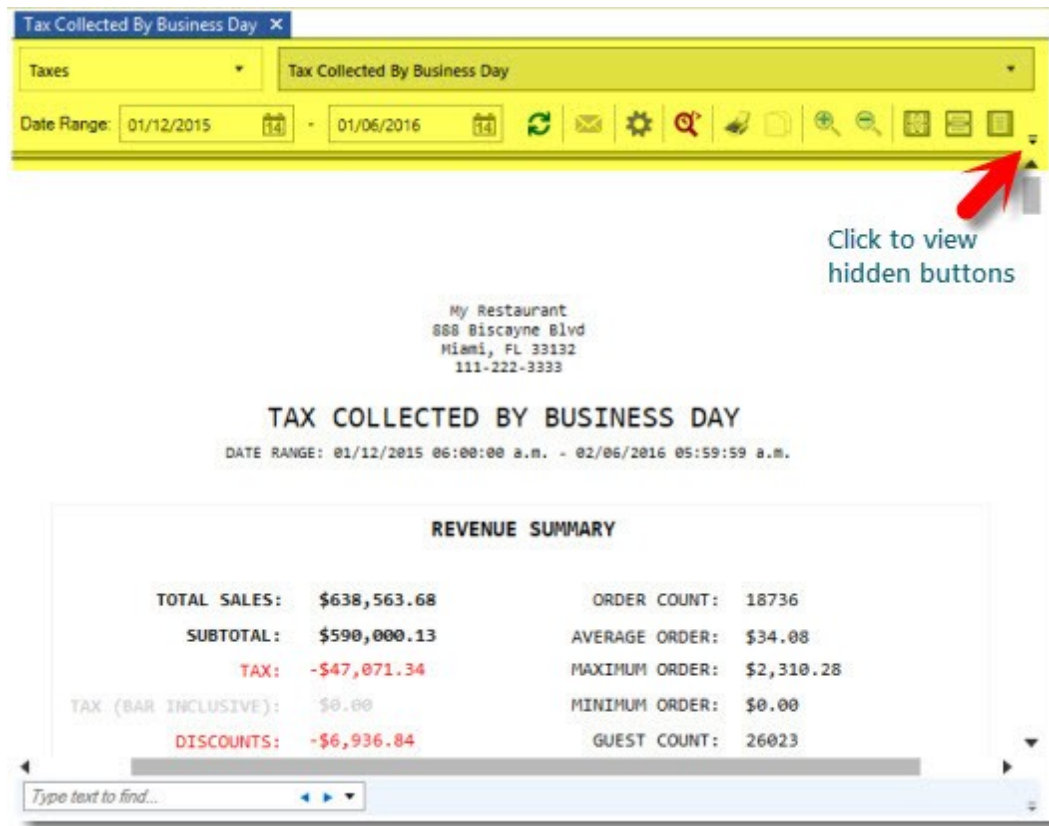
Time Sheet Activity

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.

34.2 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:

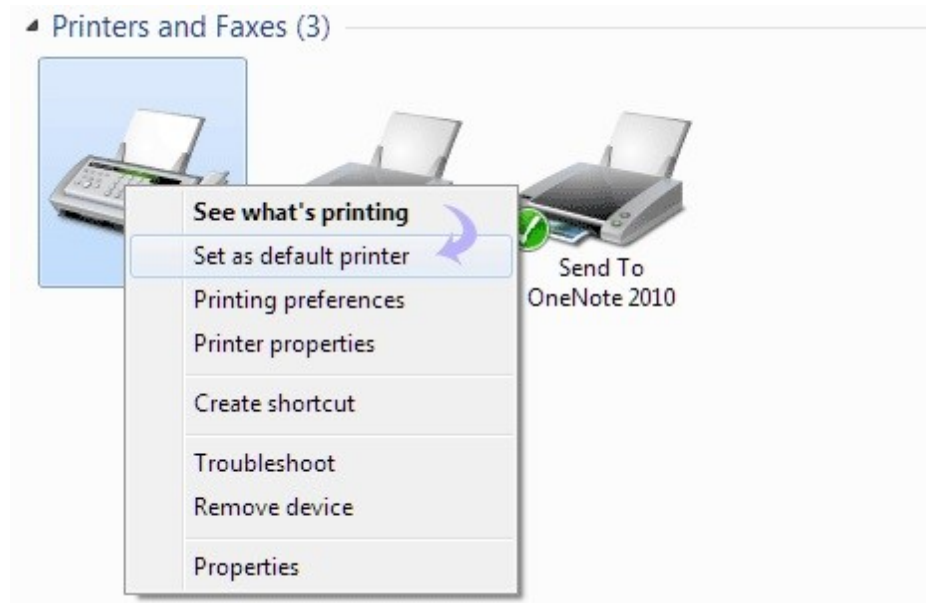


- 1. Report Category:** Select the report category from the drop-down list. Each report category corresponds to an XML report definition which can be imported into the custom report designer.
- 2. Report Name:** Select the report from the drop-down list. Each report category contains one or more reports.
- 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**^[42]. 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, 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](#) ⁷⁸⁷
- [Discounts](#) ⁷⁸⁷
- [Employees](#) ⁷⁸⁷
- [Gift Cards](#) ⁷⁸⁷
- [Customer Accounts](#) ⁷⁸⁷
- [Inventory](#) ⁷⁸⁷
- [Sales](#) ⁷⁸⁸
- [Taxes](#) ⁷⁸⁸
- [Orders](#) ⁷⁸⁹
- [Time Sheet](#) ⁷⁸⁹
- [Transactions](#) ⁷⁸⁹

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 customer 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 customer 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 customer 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](#) ⁸¹⁴ 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.

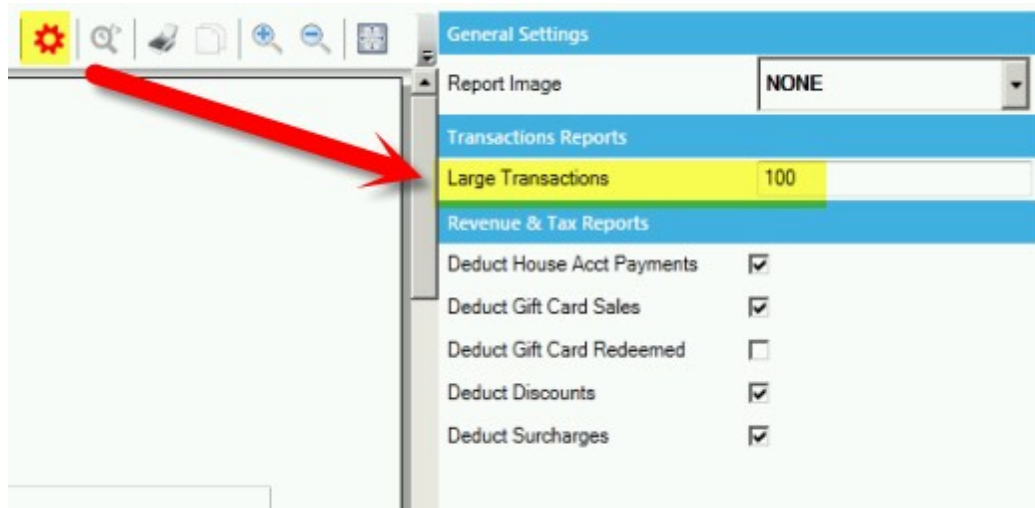
order Voids By Void Reason: This report displays the order id, date/time, void user, order type pos station id, subtotal and tax for orders entered in the specified date range and grouped by void reason id. Note that the date/time calculation is based on time entered, not time voided.

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.

34.3 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.

CASH DRAWERS

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

SHUT DOWN

FINISHED

END OF DAY

6000 Wiscayne Blvd
Miami, FL 33130
111-222-3333

END OF DAY REPORT
18/01/2016 12:56:31 p.m.

TAX COLLECTED

SALES SUBTOTAL \$27.25

TAX \$2.45

\$29.70

SALES BY ORDER TYPE SUMMARY

COUNTER(1) \$29.70

\$29.70

SUBTOTAL BY ITEM TYPE

Regular (4) \$13.25

Bar (4) \$14.00

Regular Modifier (4) \$0.00

\$27.25

SUBTOTAL BY REVENUE CENTER

FOOD \$13.25

LIQUOR \$14.00

\$27.25

SALES BY SERVER SUMMARY

DEMO U(1) \$29.70

\$29.70

PRINT

CURRENT DAY - ALL POS STATIONS

LAST END OF DAY NEVER

OPEN ORDERS COUNT 1

OPEN ORDERS TOTAL \$29.70

OPEN PREAUTH COUNT 0

SETTLED ORDERS COUNT 0

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

GRAND TOTAL \$0.00

END OF DAY DISABLED

*SETTLE 1 OPEN ORDER

End of Day Report

The Subtotal By Revenue Center Summary can be enabled in **Back Office | Settings | Main Settings | Manager Screen | End Of Day**.

Main Settings

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 SETTINGS

End Of Day Hide Totals No

End Of Day Order Type Summary Yes

End Of Day Removed Items Summary Yes

End Of Day Report Email Recipients XXXX

End Of Day Revenue Center Summary Yes

End Of Day Server Sales Summary Yes

End Of Day Subtotal By Item Type Summary Yes

End Of Day Revenue Center Summary

Set to Yes to show sales by revenue center summary on the end of day report

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.

ID	REVENUE CENTER	
+ Click here to add a new row		
1	FOOD	X
2	LIQUOR	X
3	BEER AND WINE	X
4	DESSERTS	X

Revenue Centers Editor

After adding revenue center definitions, open the menu items list to assign a revenue center to each menu item.

ID	ITEM NAME	PRICE BY WEIGHT SUFFIX	REVENUE CENTER	CONTAINER CHARGE	DEPOSIT
+ 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

Menu Items List

A revenue center can also be assigned to each regular and bar menu item in the menu item editor.

MENU ITEMS

APPETIZERS

Add a new menu item

Item name contains

FRENCH FRIES (1)

ONION RINGS (2)

MAIN SETTINGS

General Settings	
Pricing	
Price	1.75
Tax Rate	9% (ID:1/Sales Tax)
Revenue Center	FOOD
SKU	NONE
Retail Inventory	BEER AND WINE
	DESSERTS
	LIQUOR

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.

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.

MODIFIERS

Modifier Groups

Modifier Levels

New modifier group name

Name contains

ADD ICE CREAM TO PIE

ADDITIONAL SANDWICH BREAD OPTIONS

ADDITIONAL SANDWICH OPTIONS

ADDITIONAL SUB OPTIONS

ADDITIONAL WRAP TOPPINGS

BREAD OPTIONS

ODD/CRAVE MEAT

MODIFIERS

Group Settings

Modifiers

Menu Items

New modifier name

SCOOP CHOC

SCOOP VAN

SCOOP MINT CH

SCOOP STRW

SCOOP FUDGE

General Settings

Pricing

Regular Price

1

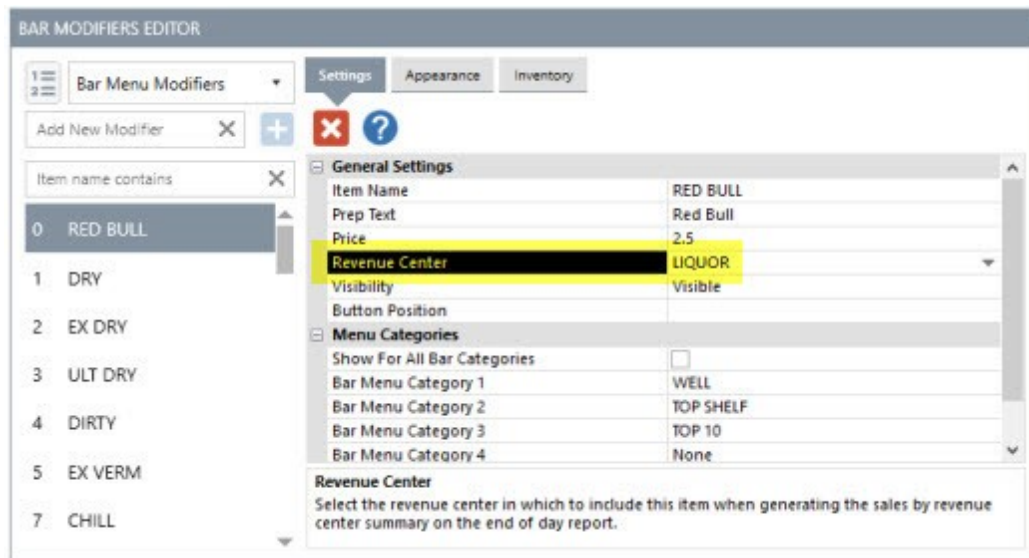
Revenue Center

FOOD

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.

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

34.4 Custom Reports

34.4.1 Database Connection

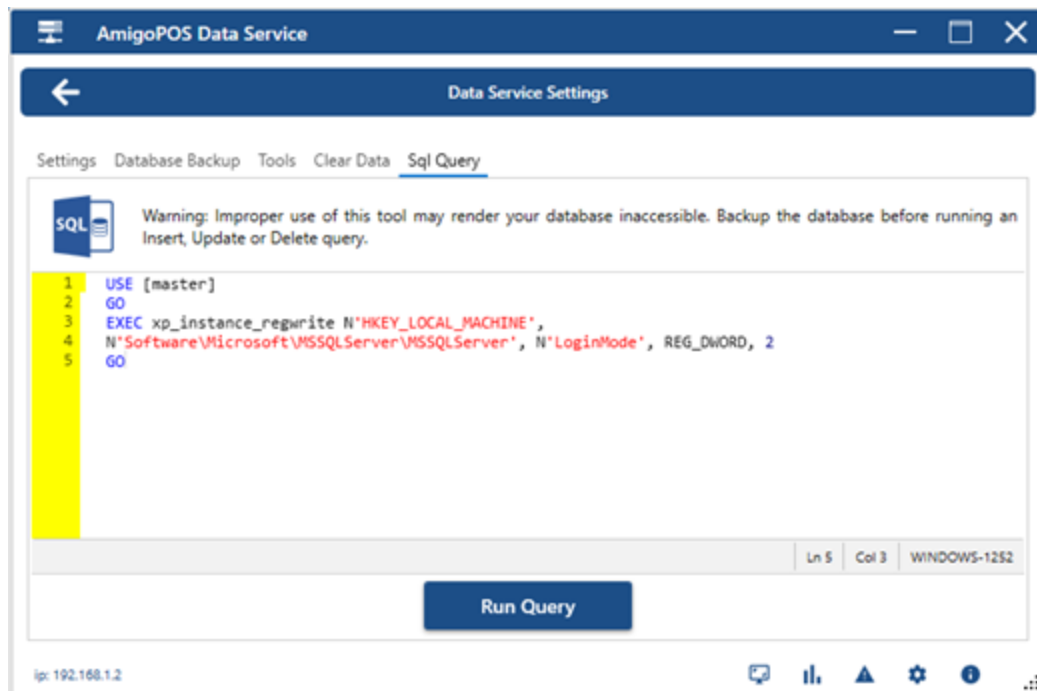
Custom reports require a direct database connection, both in back office and in the report designer. Complete the following steps to allow remote connections in SQL Server.

1. [Enable Mixed Mode Authentication](#) ⁷⁹⁴
2. [Create a new database user](#) ⁷⁹⁵
3. [Enable the TCP/IP protocol](#) ⁷⁹⁶
4. [Add Firewall exception](#) ⁷⁹⁴
5. [Restart SQL Server](#) ⁷⁹⁸
6. [Configure the report designer database settings](#) ⁷⁹⁹
7. [Configure the report viewer database settings](#)

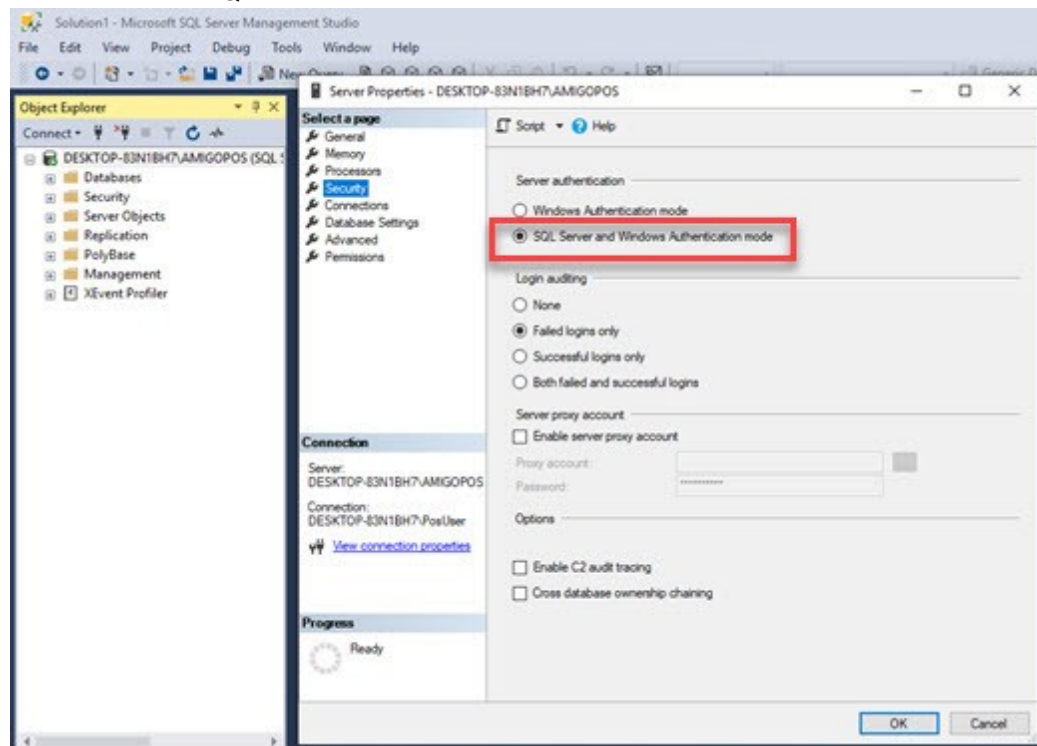
Enable Mixed Mode Authentication

Open the data service application and click SQL Query under the host settings tab. Copy and paste the highlighted text. Run the script, to enable mixed mode authentication. The change will take effect after SQL Server is restarted as described below.

```
USE [master]
GO
EXEC xp_instance_regwrite N'HKEY_LOCAL_MACHINE',
N'Software\Microsoft\MSSQLServer\MSSQLServer', N'LoginMode', REG_DWORD, 2
GO
```

Mixed mode authentication can also be enabled from SQL Server Management Studio. Right-click on the server instance and select Properties. Click Security and change the mode from Windows Authentication mode to SQL Server and Windows Authentication mode.

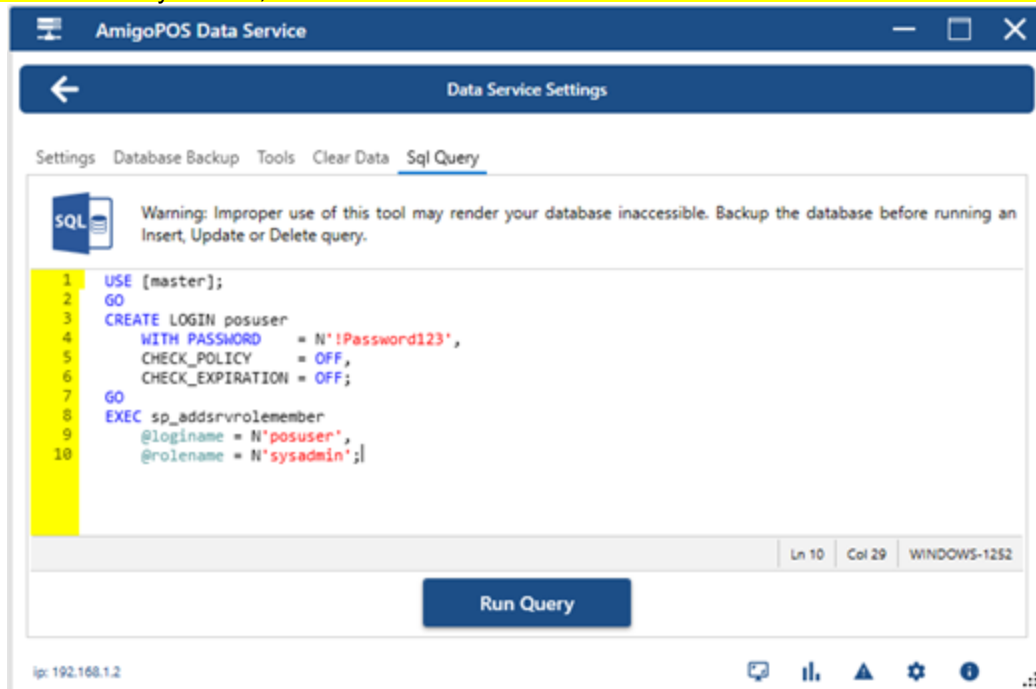


Create a new database user

Open the data service application and click SQL Query under the host settings tab. Create a new script and copy/paste the highlighted text. Run the script, which will create a new user with permission to access the server remotely. Note that in the script below, the new user name is set to posuser and the password is set to !Password123. Change both values to suit your requirements.

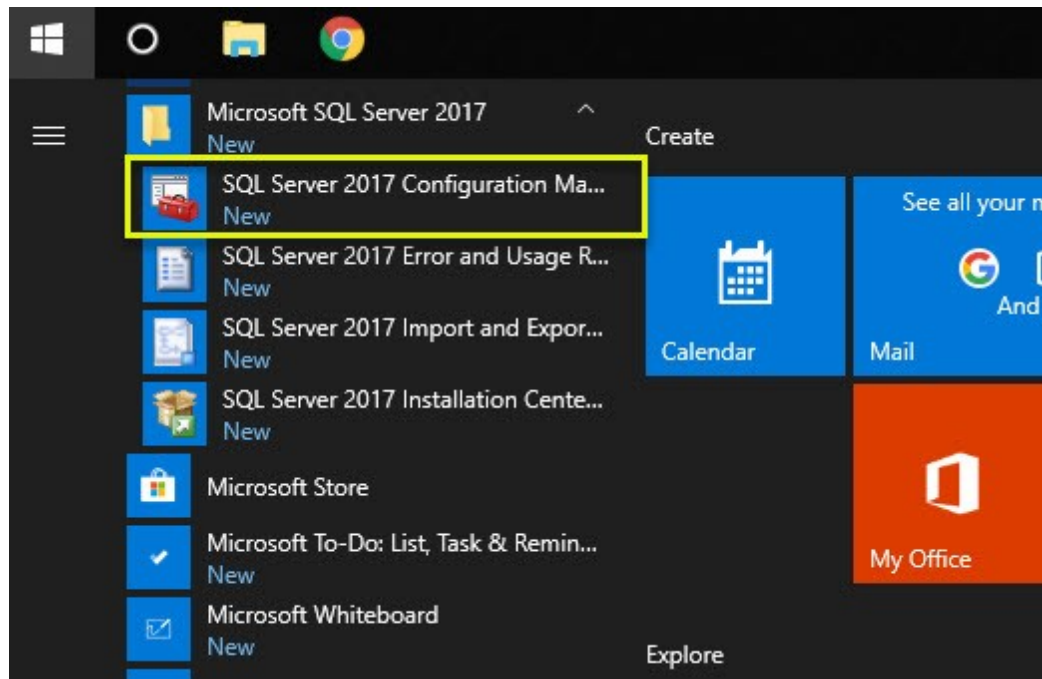
USE [master];

```
GO
CREATE LOGIN posuser
  WITH PASSWORD = N'!Password123',
  CHECK_POLICY = OFF,
  CHECK_EXPIRATION = OFF;
GO
EXEC sp_addsrvrolemember
  @loginame = N'posuser',
  @rolename = N'sysadmin';
```

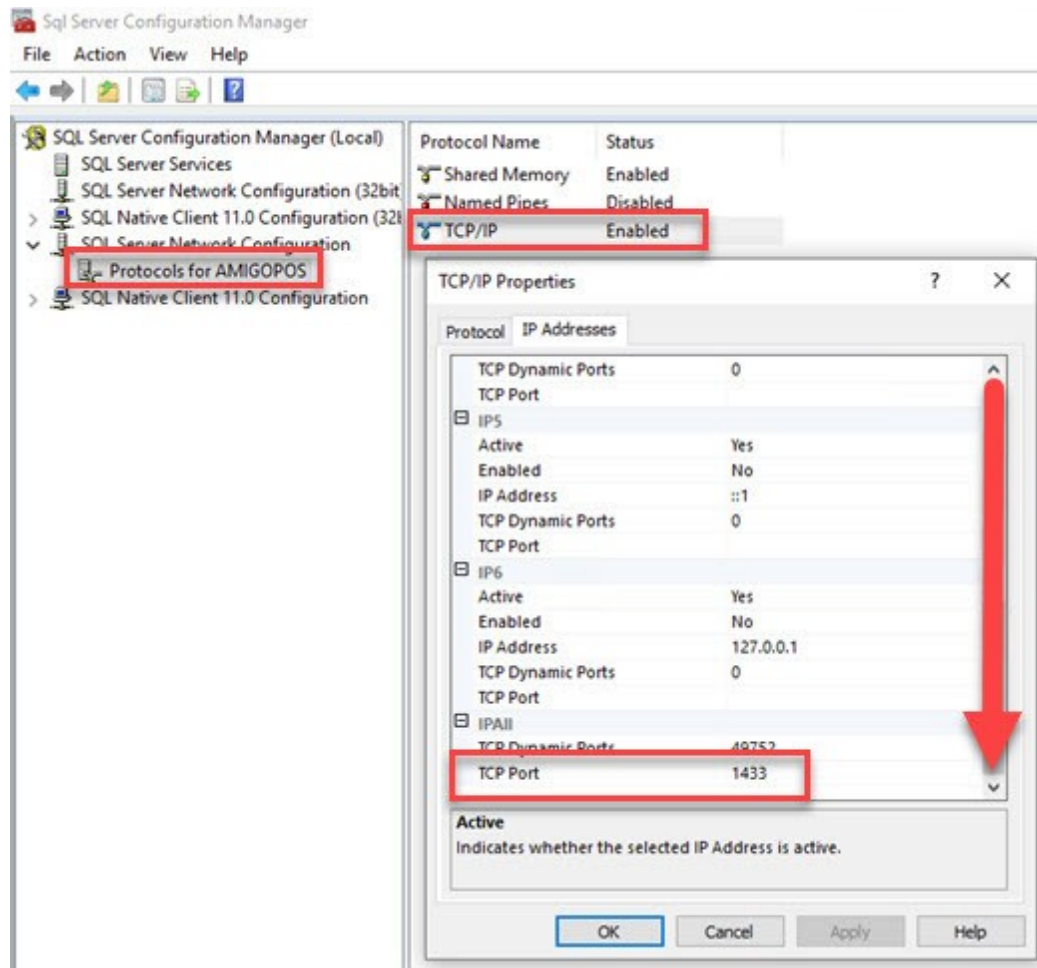


Enable the TCP/IP protocol in SQL Server Express

On the main pos station where SQL Server is installed, run the SQL Server Configuration Manager from the Microsoft SQL Server program group in the Windows Start Menu.



Select SQL Server Network Configuration and click on Protocols for *YourInstanceName*. Double-click on TCP/IP in the right pane and set Enabled to Yes. Click the IP Addresses tab, scroll to the bottom and set the value of IPAll/TCP Port to 1433.



Add Firewall Exception

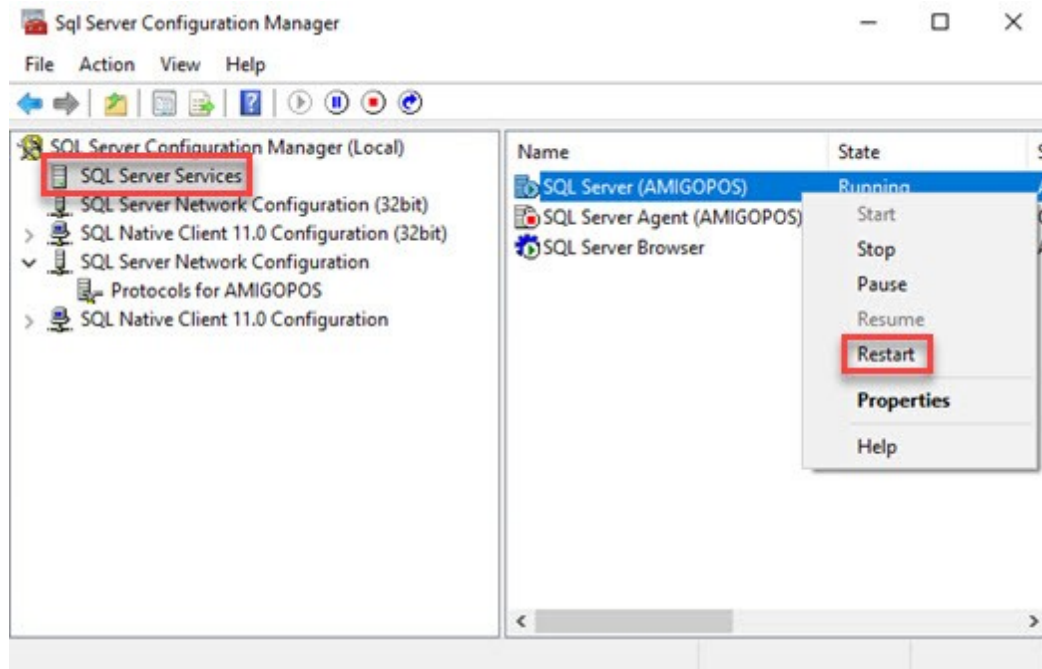
On the main pos station where SQL Server is installed, click Windows Start or the taskbar search icon and type cmd. Right-click and select Run as administrator. Copy/paste the script below and click Enter to add a firewall exception for port 1433.

netsh firewall set portopening protocol = TCP port = 1433 name = SQLPort mode = ENABLE scope = SUBNET profile = CURRENT

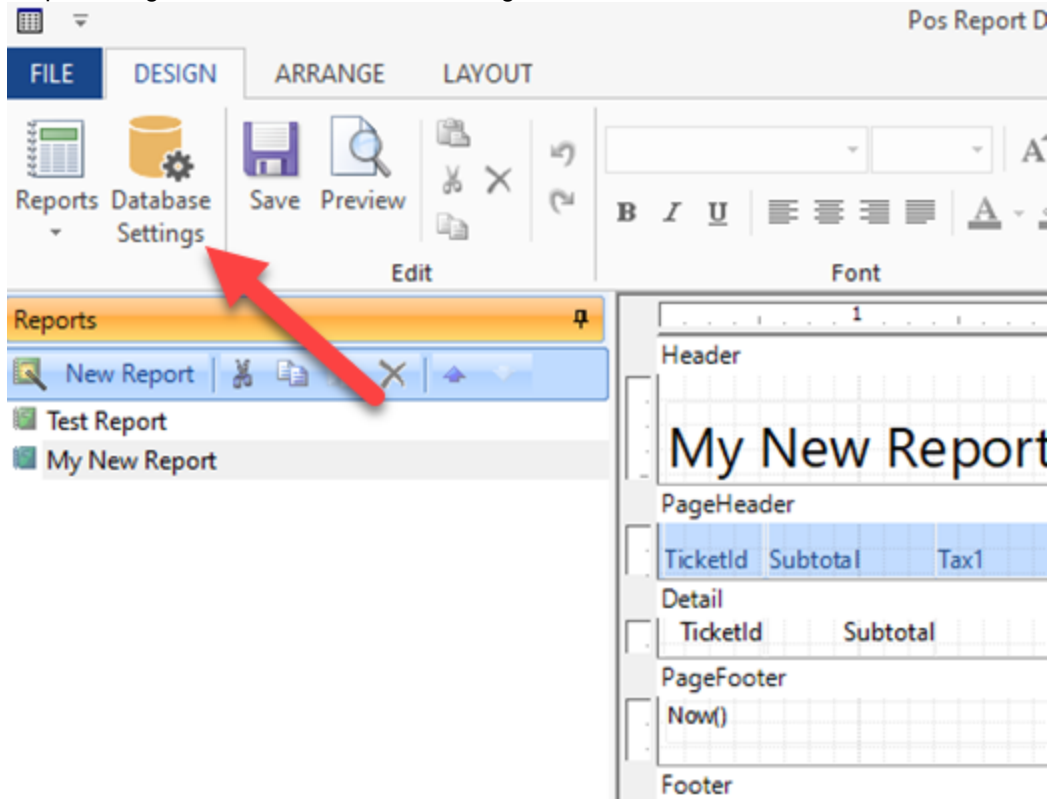
<

Restart SQL Server

On the main pos station where SQL Server is installed, run the SQL Server Configuration Manager from the Microsoft SQL Server program group in the Windows Start Menu. Select SQL Server Services, right-click on SQL Server and restart SQL Server to begin using the TCP/IP protocol.



Report Designer Database Settings
Run the report designer and click Database Settings.



Copy the server and database settings from the data service application Data Service/Settings tab on the main pos station, select SQL Server Authentication, enter the username and password from step 2 above and click Save & Test to verify that the connection parameters are correct.

Database Settings

Server: DESKTOP-83N1BH7AmigoPos

Database: MyRestaurant

Driver Version: 2012

Security: Sql Server Authentication

Login: posuser

Password:

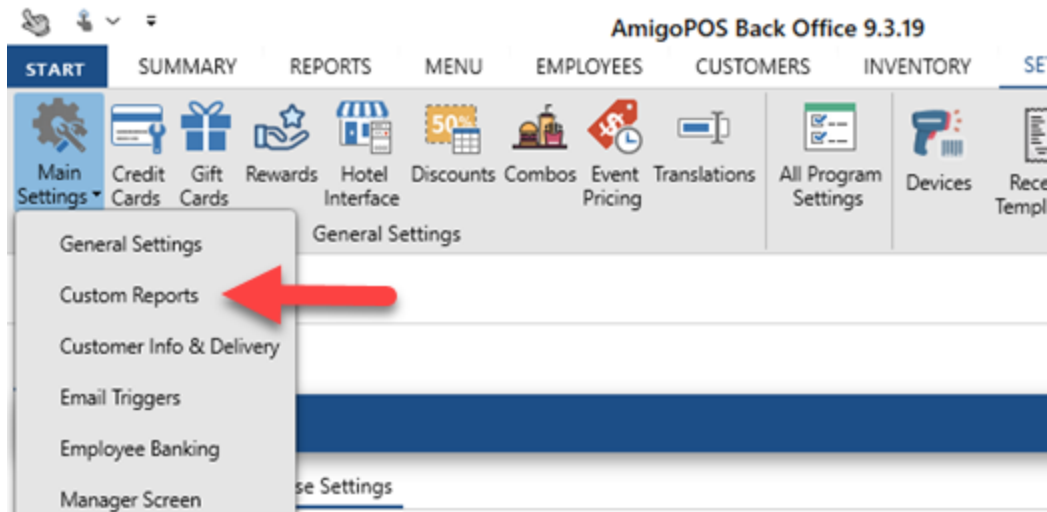
Timeout: 5

Save & Test

Report Viewer Database Settings

Install SQL Native Client 2012 or later on any computer that is used to view custom reports in back office. Download SQL Native Client 2012 from Microsoft at <https://www.microsoft.com/en-us/download/details.aspx?id=50402>.

Run back office | settings | main settings | custom reports and select the Database Settings tab. Copy the server and database settings from the data service application Data Service | Host Settings tab on the main pos station, select SQL Server Authentication, enter the username and password from step 2 above, select the SQL Native Client version and click Save & Test to verify that the connection parameters are correct.



Custom Reports Settings

Report Definitions Database Settings

Server: (local)\sqlexpress2012

Database: AmigoPos9_1

Driver Version: 2012

Security: Sql Server Authentication

Login: sa

Password: ••••••••

Timeout: 5

34.4.2 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](#)^[801]
- [Create a New Report](#)^[802]
- [Display Date Range in Report Header](#)

Enable a Report Definition

Open back office | main settings | custom reports and check the box to enable the first report definition. Enter a user-friendly name for the report, such as "Sales" and click Enter or change rows to commit the changes.

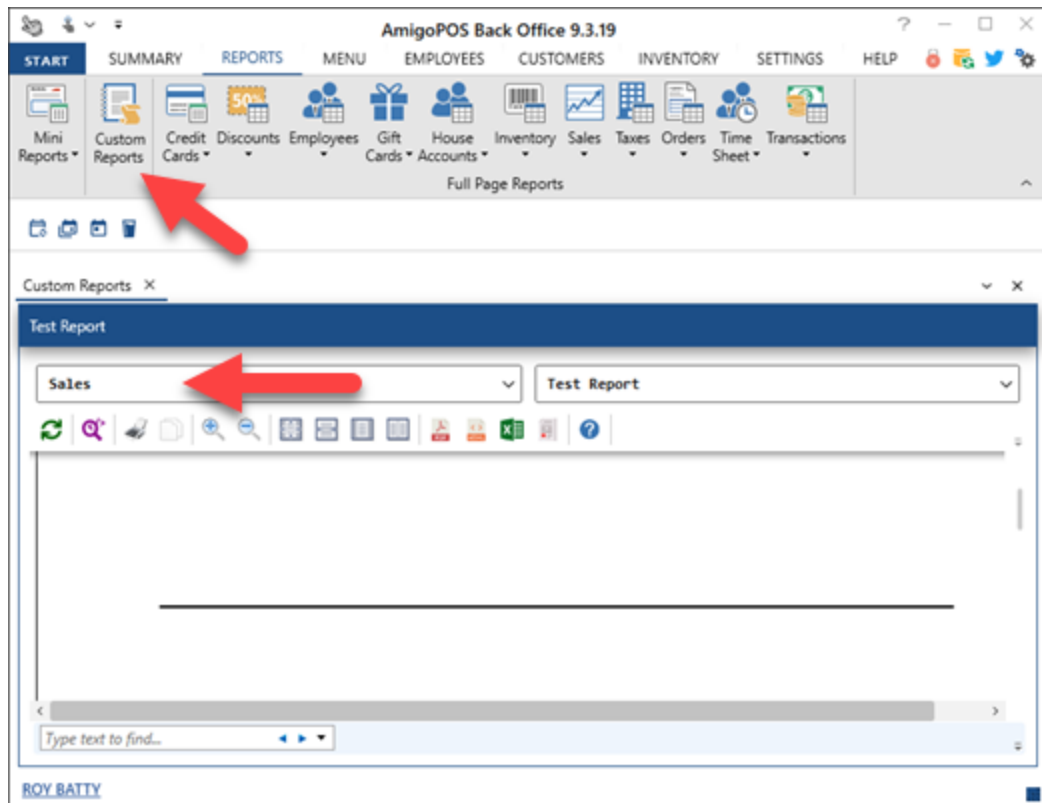
Custom Reports Settings

Report Definitions Database Settings

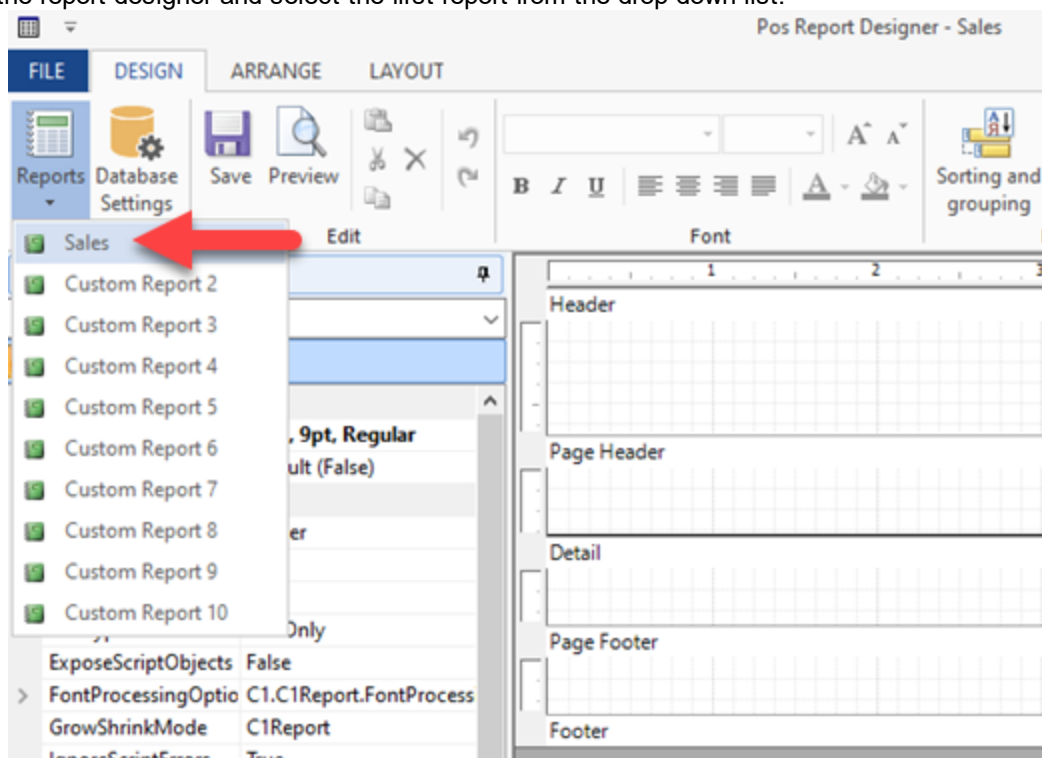
Report definition file names are based on the button text. Close the report designer before changing the button text.

ID	Report Name	Enabled	Import	View
1	Sales	<input checked="" type="checkbox"/>	📄	🔍
2	Custom Report 2	<input type="checkbox"/>	📄	🔍
3	Custom Report 3	<input type="checkbox"/>	📄	🔍
4	Custom Report 4	<input type="checkbox"/>	📄	🔍
5	Custom Report 5	<input type="checkbox"/>	📄	🔍
6	Custom Report 6	<input type="checkbox"/>	📄	🔍
7	Custom Report 7	<input type="checkbox"/>	📄	🔍
8	Custom Report 8	<input type="checkbox"/>	📄	🔍

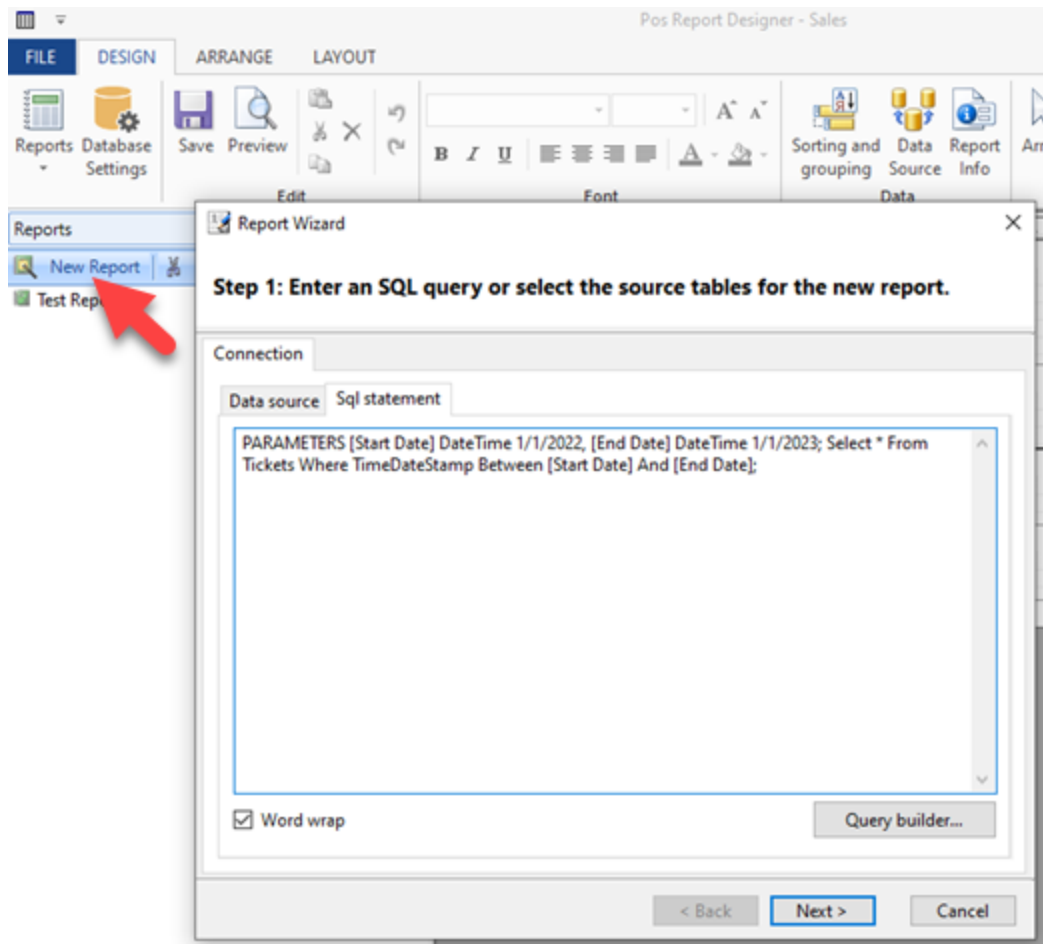
The back office custom reports button is immediately enabled and the report definition is added to the list.



Open the report designer and select the first report from the drop-down list.



Create a New Report
Click New Report to add a new report to the report definition.



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 1/1/2022, [End Date] DateTime 1/1/2023; 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

1/1/2022 : default value

[End Date] : second parameter name

DateTime : parameter data type

1/1/2023 : 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
- DateTime

- Bit,Byte,Short,Long
- Currency
- Single
- Double
- Text,String
- Boolean,Bool,YesNo

This parameter definition will prompt the end user to enter the dates as shown below:

Verify that the SQL statement is entered correctly and click Next.

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.

Report Wizard

Step 2: Select the Fields that will be included in the new report.

Available

- LoyaltyCardBonus
- LoyaltyCardId
- LoyaltyCardTrack
- NewTicketId
- Notes
- OrderStarted
- OrderStatus
- OrderTypeId
- RefundId
- RowGuid
- SeatingChartId
- Settled
- Split
- SplitUserId
- SRMStatus
- StoreId
- TaxExempt
- TerminalId
- TimeDateStamp
- UserId
- VnId

Groups

Detail

- TicketId
- Subtotal
- Tax1
- Tax2
- Tax3
- GratuityAmount
- DeliveryCharge
- SurchargeAmount

< Back **Next >** Cancel

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.

Report Wizard

Step 3: Select the layout for the new report.

Layout

☐ Columnar
 ☐ Stepped

☒ Tabular
 ☐ Outline

☐ Justified
 ☐ Aligned

☐ Labels

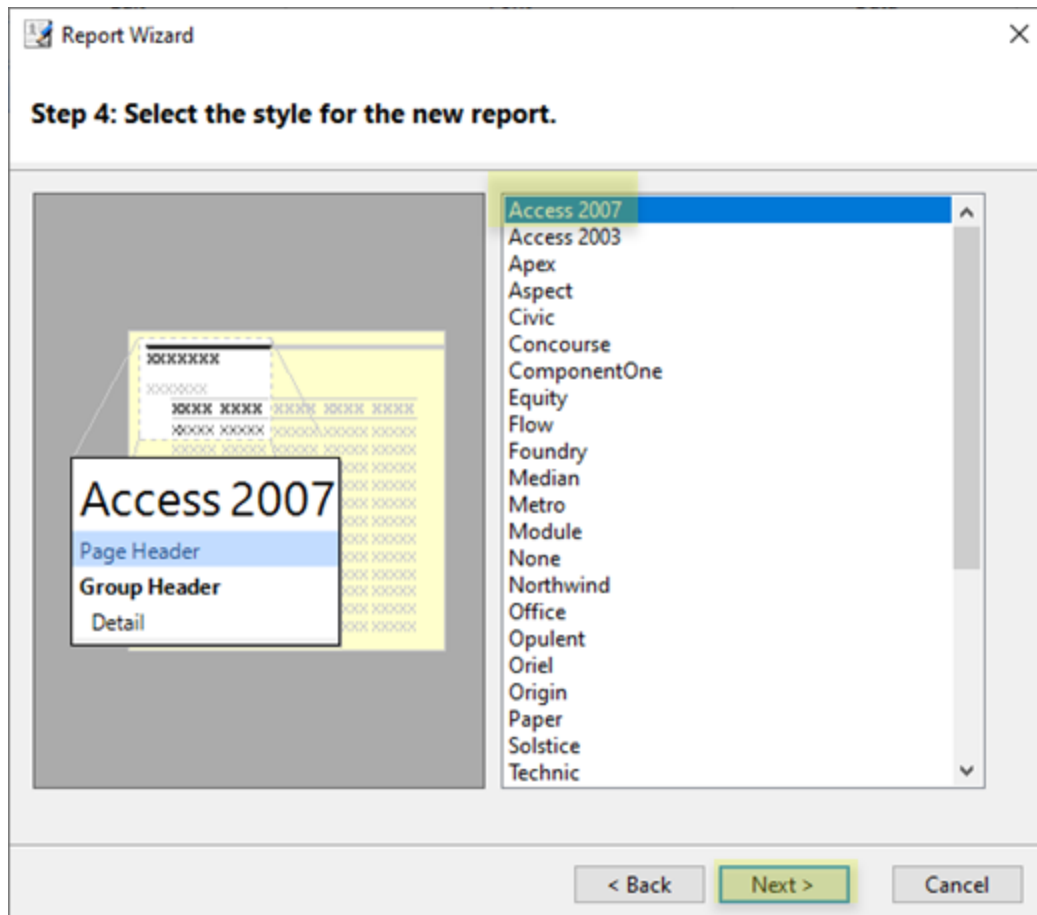
Orientation

☒ Portrait
 ☐ Landscape

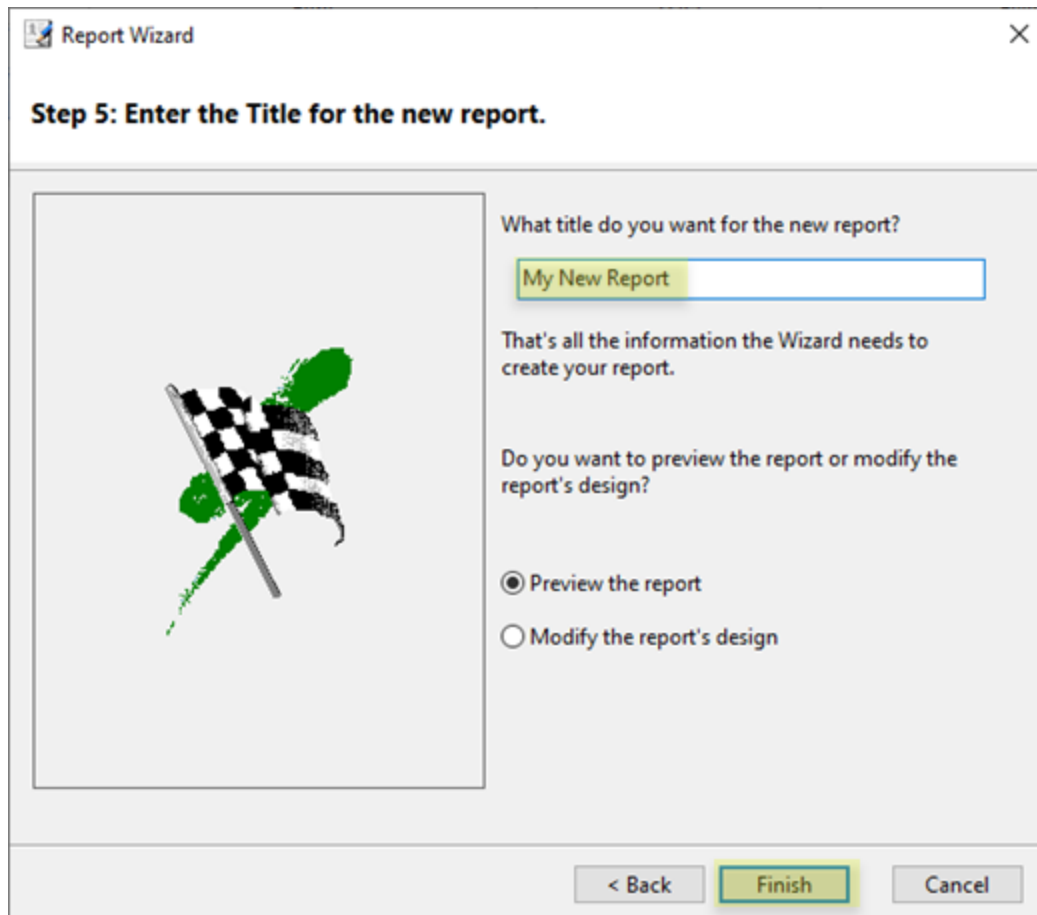
☒ Adjust fields to fit page

< Back
 Next >
 Cancel

Select a visual style for the report and click Next to continue.



Duplicate report names cannot be used in the same report definition. Enter a unique name for the report and click Finish.



Report Wizard

Step 5: Enter the Title for the new report.

What title do you want for the new report?

My New Report

That's all the information the Wizard needs to create your report.

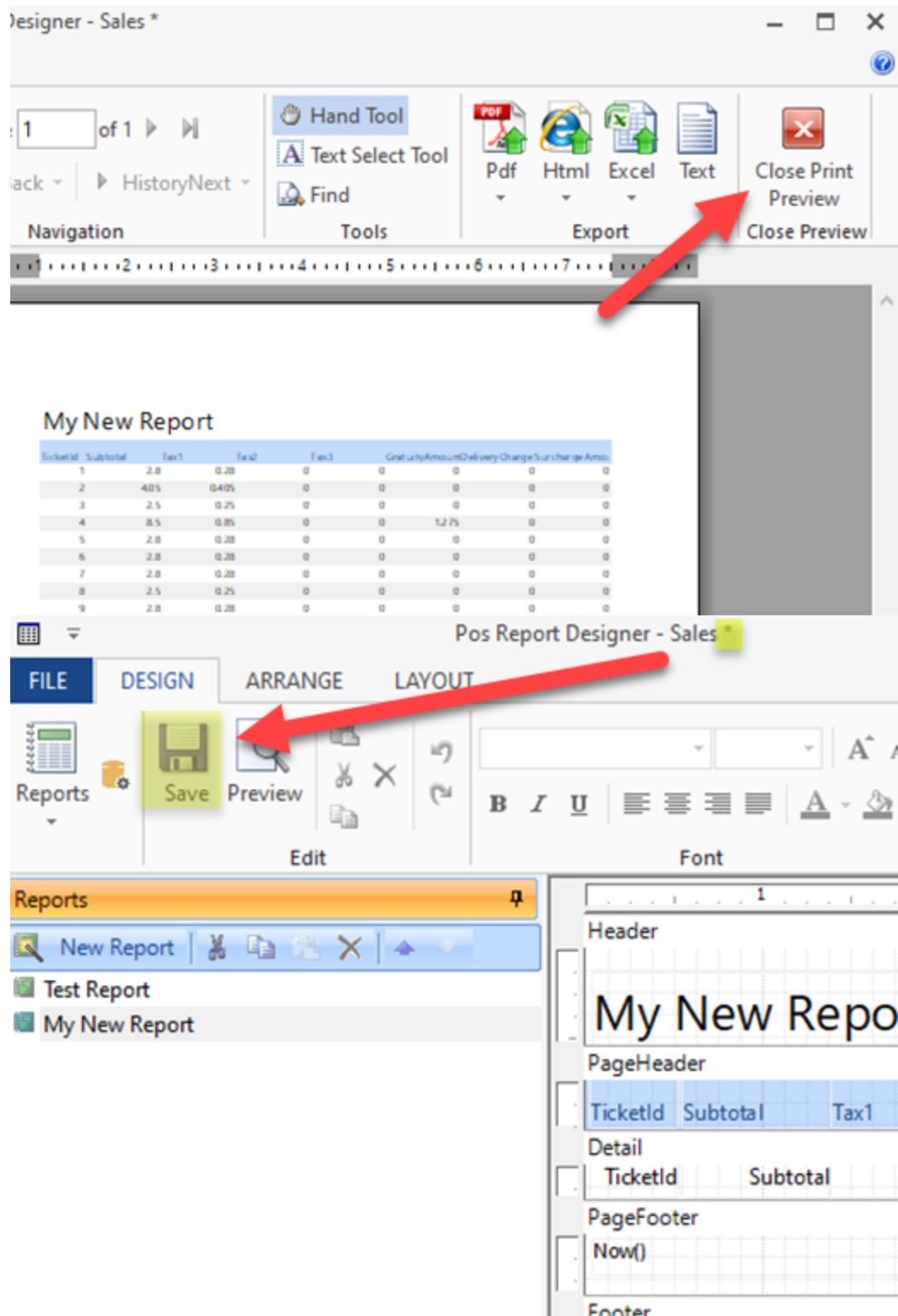
Do you want to preview the report or modify the report's design?

☒ Preview the report

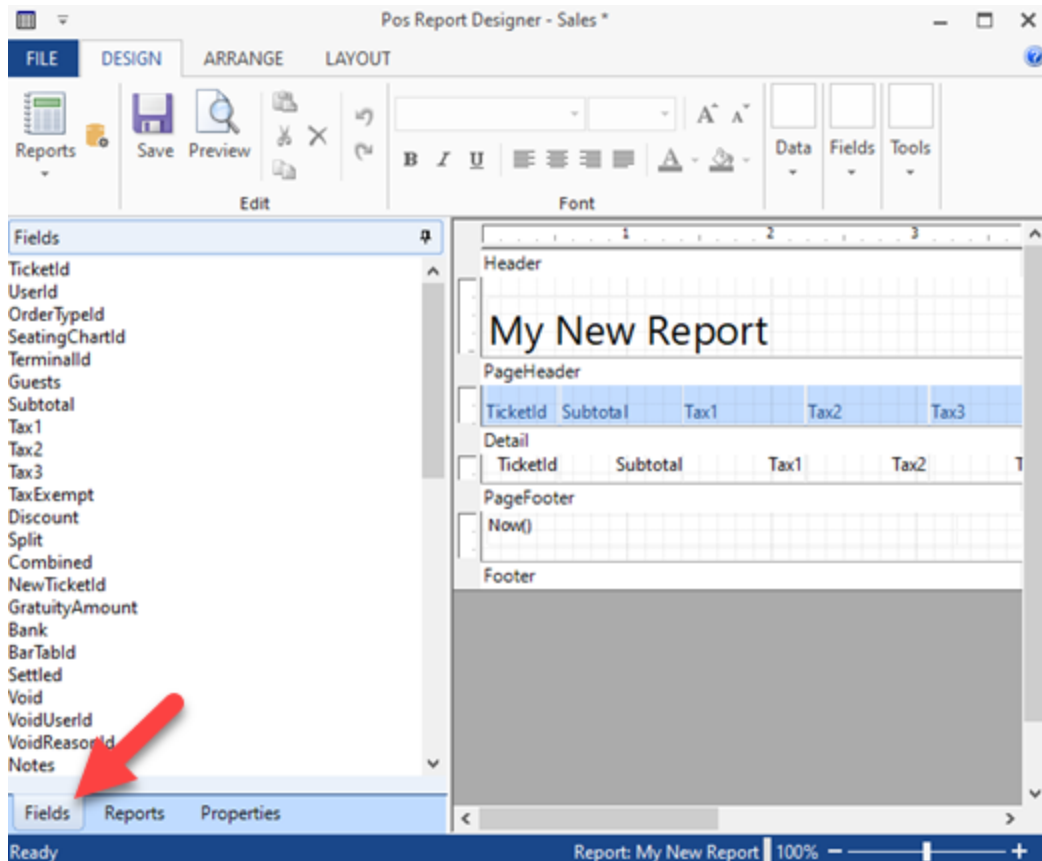
☐ Modify the report's design

< Back **Finish** Cancel

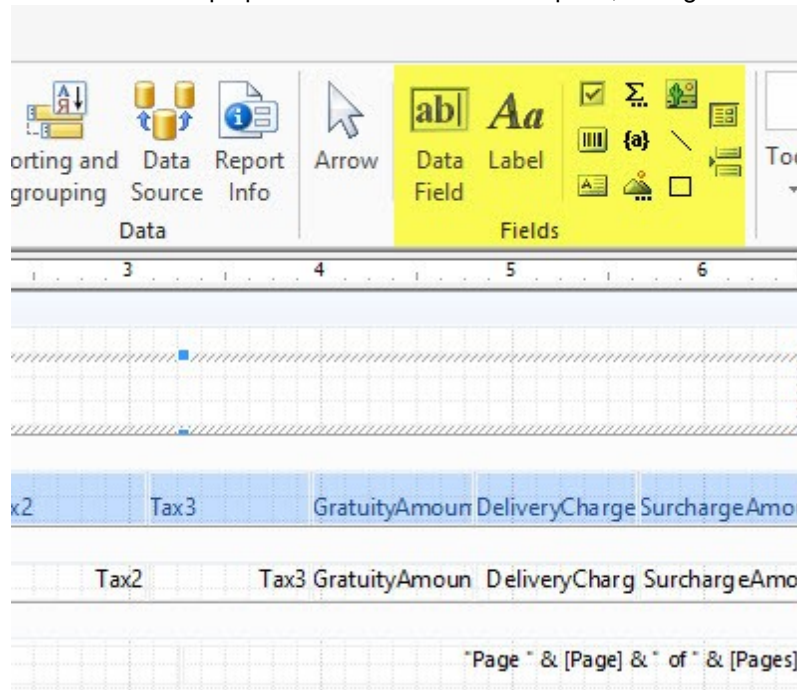
The report is displayed in preview mode and the parameter prompt appears. Click Close Print Preview at the far right to view the report on the designer canvas. Select any field to view its properties above the properties tab. Note that the asterisk in the Window caption indicates that the report definition has unsaved changes. Click Save to write the report definition to the database.



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.

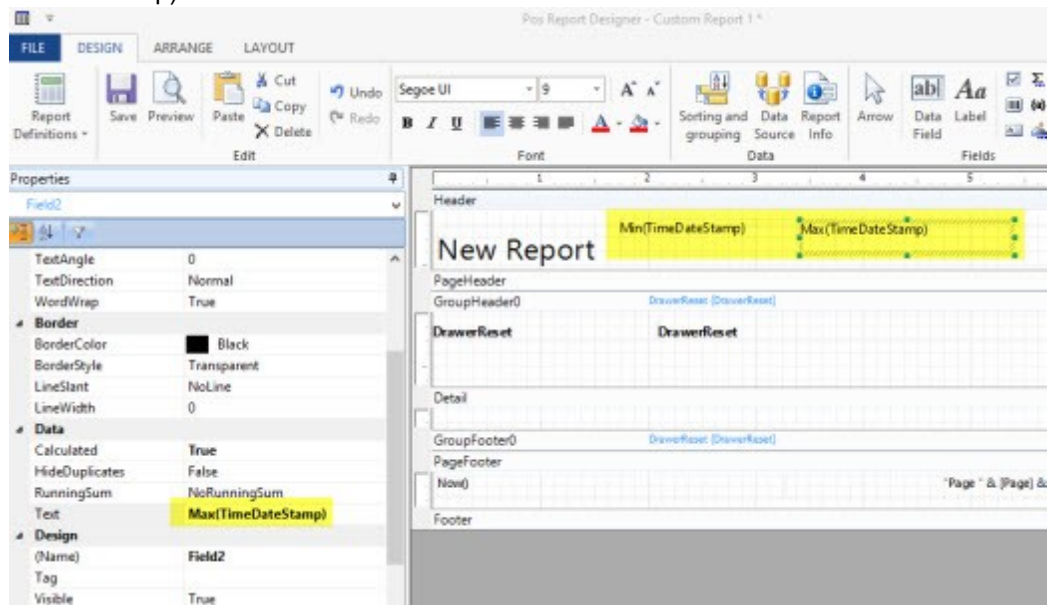


Other items that are not bound to the SQL statement (such as text labels or lines) are available in the fields toolbar and can be dragged onto the designer canvas. After adding the unbound field to the canvas, select the field to view the editable properties such as the text caption, background color or font.



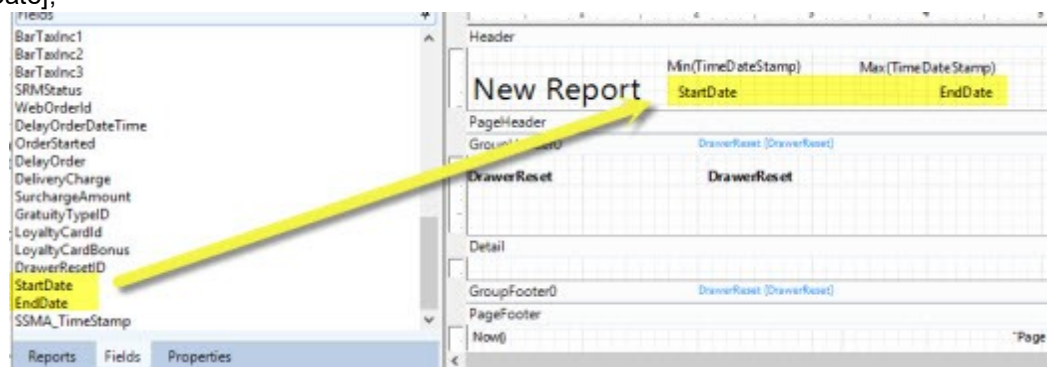
Display Date Range in Report Header

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];



Sales Tax

35 Sales Tax

35.1 Settings

AmigoPOS includes support for most sales tax requirements. Click Back Office | Settings | Main Settings | Sales Tax to configure the sales tax settings.

The screenshot shows the 'Sales Tax Settings' window. At the top, there is a checkbox for 'VAT Tax (tax is included in the price of all items)'. Below this, a section titled 'Tax Rate 1' contains a 'Description' field with 'SALES TAX' and an 'Abbreviation' field with 'T1'. Underneath, there are two sets of input fields for 'Value', 'Alias', and 'Minimum'. The first set has '0.1000', 'TAX', and '0.00'. The second set has '0.0000', '-', and '0.00'. A 'Save Changes' button is at the bottom.

Up to 4 tax rate definitions are available, 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](#)⁷⁸⁸ to determine if separate tax rate components are required for your municipality.

Itemized Tax

Users in municipalities such as Ontario, Canada are required to 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.

The screenshot shows the 'Sales Tax Settings' window with 'Tax Rate 1' configured for Ontario. The 'Description' field contains 'ONTARIO' and the 'Abbreviation' field contains 'T1'. The input fields are set as follows: Value: 0.0700, Alias: GST, Minimum: 0.00; Value: 0.0500, Alias: PST, Minimum: 4.00. A 'Save Changes' button is at the bottom.

In addition, insert the following tokens in the [customer receipt template](#)¹⁸⁶ to display the GST and PST on separate lines:

```
<TextSize=10 /><TextBold />GST<Column /><TextAlign=Right /><Tax1 /><Line />
<TextSize=10 /><TextBold />PST<Column /><TextAlign=Right /><Tax2 /><Line />
```

Template Order Items Payments Discount Details

```

3 <Image Id=1 />
4 <TextAlign=Center /><TextBold />My Restaurant
5 <TextAlign=Center /><TextBold />Rue de Rivoli
6 <TextAlign=Center /><TextBold />75001 Paris, France
7 <Line />
8 Server: <ServerFullName /><Column />Date: <DateTimeStarted />
9 Guests: <Guests /><Column />Table: <TableName />
10 <Validate=OrderNotes /><TextSize=10 />Notes:<Column /><OrderNotes />
11
12 <OrderItems />
13 <TextSize=10 /><TextBold />Subtotal<Column /><TextAlign=Right /><Subtotal />
14 <Validate=Surcharge /><TextSize=12 />Surcharge<Column /><TextAlign=Right /><Surcharge />
15 <Validate=DeliveryCharge /><TextSize=12 />Delivery<Column /><TextAlign=Right /><Delivery />
16 <Validate=MandatoryGratuity /><TextSize=12 />Gratuity<Column /><TextAlign=Right /><Gratuity />
17 <TextSize=10 /><TextBold />GST<Column /><TextAlign=Right /><Tax1 /><Line />
18 <TextSize=10 /><TextBold />PST<Column /><TextAlign=Right /><Tax2 /><Line />
19 <TextSize=10 /><TextBold />Total<Column /><TextAlign=Right /><TotalAmount />
20 <Validate=SplitEvenHide /><TextBold /><TextSize=15 />Balance Due<Column /><TextAlign=Right /><BalanceDue />
21 <Validate=SplitEven /><TextBold /><TextSize=12 /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
22
23 <Validate=SplitEven /><TextBold /><TextSize=12 /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
24 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
25 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
26 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />

```

Receipt Printer: EPSON TM-T20 Receipt **Print Receipt**

Select the order: #16 COUNTER

75001 Paris, France

Server: ROY BATTY Date: 4/18/2022 05:35
Guests: 1 Table:

8 COKE	10.00	T1
Conservez le Soda		

Subtotal \$10.00
GST \$0.70
PST \$0.80
Total \$11.50

Balance Due \$11.50

Scan the barcode or visit
www.mywebsiteurl.com
for special offers!

Combined Tax

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.

Sales Tax Settings

☐ VAT Tax (tax is included in the price of all items)

Tax Rate 1

Description: SALES TAX Abbreviation: T1

Value	Alias	Minimum	Value	Alias	Minimum	Value	Alias	Minimum
0.1000	TAX	0.00	0.0000	-	0.00	0.0000	-	0.00

Save Changes

Insert the following tokens in the [customer receipt template](#)¹⁸⁶ to display the total tax on a single line:
 <TextSize=10 /><TextBold />Tax<Column /><TextAlign=Right /><TaxTotal /><Line />

Receipt Templates

Template Order Items Payments Discount Details

```

4 <TextAlign=Center /><TextBold />My Restaurant
5 <TextAlign=Center /><TextBold />Rue de Rivoli
6 <TextAlign=Center /><TextBold />75001 Paris, France
7 <Line />
8 Server: <ServerFullName /><Column />Date: <DateTimeStarted />
9 Guests: <Guests /><Column />Table: <TableName />
10 <Validate=OrderNotes /><TextSize=10 />Notes:<Column /><OrderNotes />
11
12 <OrderItems />
13 <TextSize=10 /><TextBold />Subtotal<Column /><TextAlign=Right /><Subtotal />
14 <Validate=Surcharge /><TextSize=12 />Surcharge<Column /><TextAlign=Right /><Surcharge />
15 <Validate=DeliveryCharge /><TextSize=12 />Delivery<Column /><TextAlign=Right /><Delivery />
16 <Validate=MandatoryGratuity /><TextSize=12 />Gratuity<Column /><TextAlign=Right /><Gratuity />
17 <TextSize=10 /><TextBold />Tax<Column /><TextAlign=Right /><TaxTotal /><Line />
18 <TextSize=10 /><TextBold />Total<Column /><TextAlign=Right /><TotalAmount />
19 <Validate=SplitEvenHide /><TextBold /><TextSize=15 />Balance Due<Column /><TextAlign=Right /><BalanceDue />
20 <Validate=SplitEven /><TextBold /><TextSize=12 /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
21 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
22 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
23 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
24 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
25 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
26 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />
27 <Validate=SplitEven /><TextSize=15 /><TextBold /><TextAlign=Center />PAYMENT DUE<Column /><TextAlign=Right /><PaymentDue />

```

Receipt Printer: EPSON TM-T20 Receipt **Print Receipt**

Select the order: #16 COUNTER

75001 Paris, France

Server: ROY BATTY Date: 4/18/2022 05:35
Guests: 1 Table:

8 COKE	10.00	T1
Conservez le Soda		

Subtotal \$10.00
Tax \$1.50
Total \$11.50

Balance Due \$11.50

Scan the barcode or visit
www.mywebsiteurl.com
for special offers!

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).

Order Type Settings

Search

Show Phone Number ☐

Show Customer Name Promot ☐

▼ Sales Tax

Bar Menu Tax Included ☒

Non Taxable ☐

▼ Remote Display

Remote Display Background Color DimGray

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 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](#)^[720] topic.

Menu Categories

Regular and Bar

Add new category +

0 / 50

4 SUBS

5 DRINKS

6 -

7 DESSERTS

8 CLUBS

9 SANDWICHES

10 BURGERS

Main Settings Menu Item Assignments Button

Search

▼ Pricing

Inventory Markup 4.00

Exclude From Special Pricing ☐

Exclude From Event Pricing ☐

Takeout Non-Taxable ☒

▼ Day/Time Availability

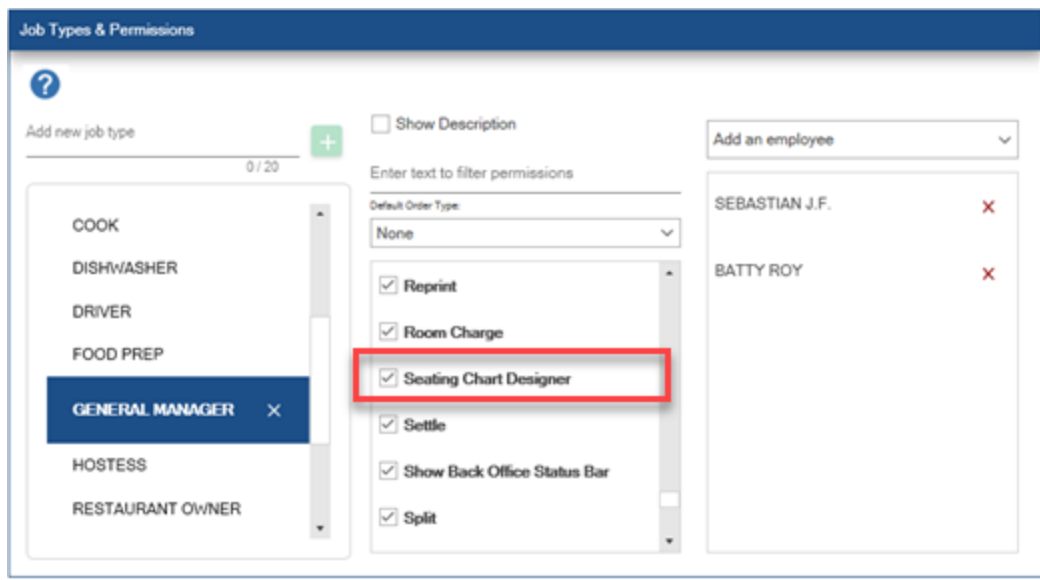
Category Name

The name that appears on the menu category button and reports. Each category must have a name (do not leave blank)

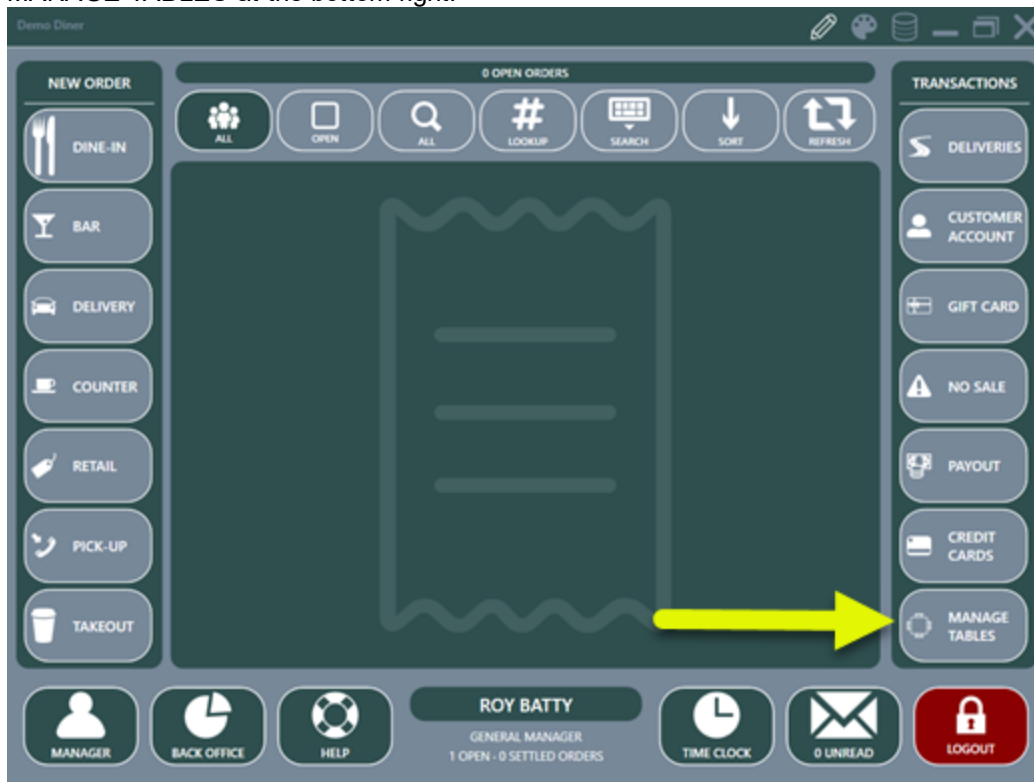
Seating Charts

36 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 on the table management screen by pressing the **DESIGNER** button. The button is only visible for job types that have the Seating Chart Designer [permission](#) ⁴³³ enabled as in the image below.



Select **MANAGE TABLES** at the bottom right.

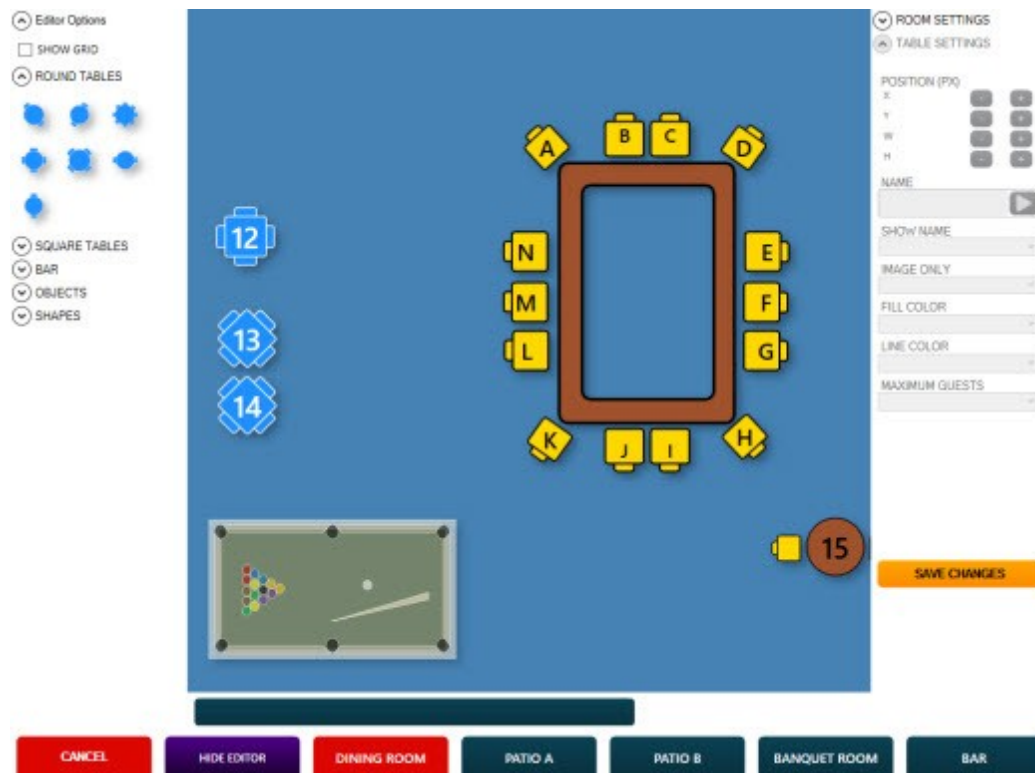


The seating chart is composed of an unlimited number of images that can be dragged to any coordinates on the screen when the seating chart is in edit mode. When designing a seating chart, each image can

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.



Click 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.



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.

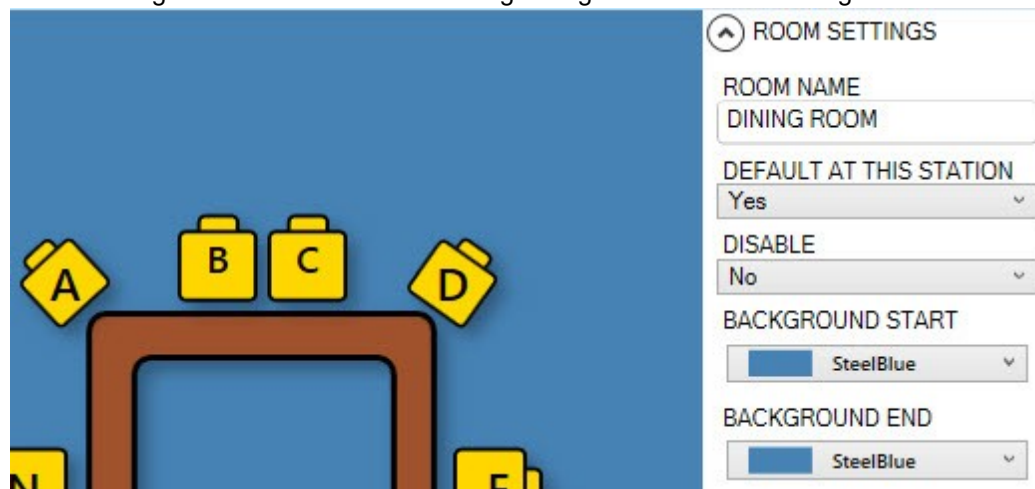
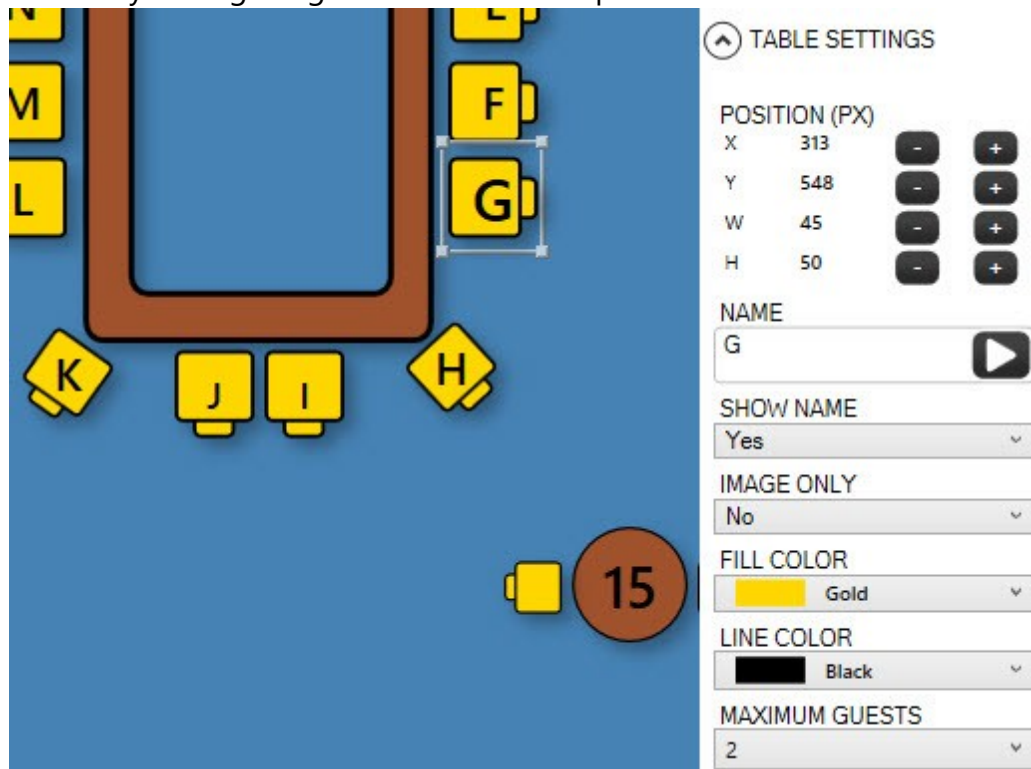


Table Settings

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.



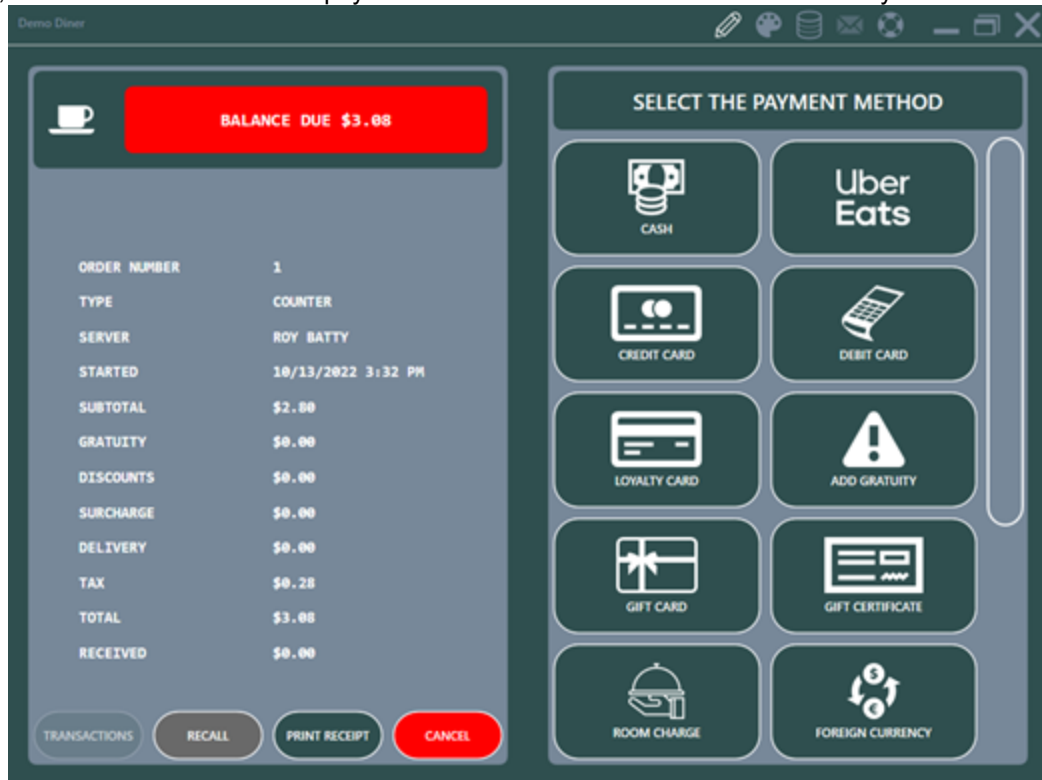
Click **SAVE CHANGES** to update the database. Note the the table borders correspond to the image size. Table placement is shown at the bottom left in pixels. To achieve exact placement, use the arrow buttons to nudge the table 1 pixel in any direction. Ensure that the tables do not overlap.

Settle Screen

37 Settle Screen

37.1 Payment Methods

Payment methods are used to settle orders and displayed as a list on the settle screen. In addition, the CASH, CREDIT and CASH BANK payment methods are available on the order entry screen.



Default Payment Methods

The default payment methods created with a new database are:

- Bank Check
- Cash
- Credit Card
- Customer Account
- Debit Card
- Foreign Currency
- Gift Card
- Gift Certificate
- Loyalty Card
- Manual Credit
- Room Charge

In addition, the following payment methods are used internally and cannot be accessed on the settle screen:

- Account Payment
- Add Gratuity
- Cash Bank

Description	Cash
Button Text	CASH
Button Position	1
Open Cash Drawer	<input checked="" type="checkbox"/>
Disable	<input type="checkbox"/>
Image Only	<input type="checkbox"/>
Id	1

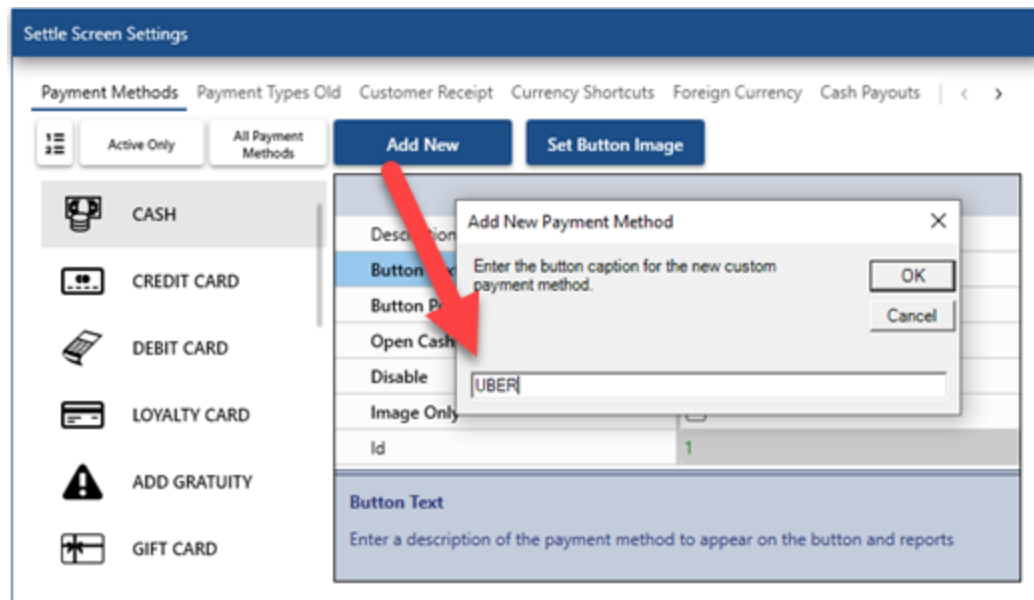
Button Text
Enter a description of the payment method to appear on the button and reports

Each payment method can be edited in back office | settings | main settings | settle screen. The following settings are available for each default payment method:

- Description: Read only value that describes the payment method
- Button Text: The text that appears below the image on the settle screen button
- Button Position: Numeric value that determines the order in which the payment methods are displayed on the settle screen
- Open Cash Drawer: When enabled, the cash drawer will open when a transaction is saved with this payment method
- Disable: Disable the payment method to hide it on the settle screen
- Button Image: The icon that appears above the image on the settle screen button. The icon is a single SVG path that is displayed properly regardless of screen resolution. A list of commonly used images are available below. To change an image, copy the path data, click Set Button Image and paste the path data.
- Image Only: When enabled, the button text will not be displayed on the button
- Id: Numeric value used to query the TransactionTypes database table for custom reports

Custom Payment Methods

Custom payment methods can be created for specific requirements where the default payment methods cannot be used. For example, when using an online delivery platform such as Door Dash or Uber Eats, the order can be settled at the pos using a custom payment method for proper accounting and reports. Click Add New and enter the button text to create a custom payment method.










In addition to the default payment method settings described above, the following settings are available for the custom payment method:

- **Currency Field Enabled:** When enabled, a currency formatted box is displayed on the payment screen. This field is typically used to enter the gratuity or surcharge,
- **Currency Field Description:** The text displayed to the left of the currency field box
- **Add Currency Field To Total:** Automatically update the transaction amount to include the sum of the currency field value and the order's balance due.
- **Text Field Enabled:** When enabled, a numeric field is displayed on the payment screen. This field is typically used to enter the external order id or transaction id.
- **Text Field Description:** The text displayed to the left of the text field box

Settle Screen Settings

Payment Methods
Payment Types Old
Customer Receipt
Currency Shortcuts
Foreign Currency
| < >

1= 2=
Active Only
All Payment Methods
Add New
Set Button Image
Delete Selected

 ROOM CHARGE
 FOREIGN CURRENCY
 HOUSE ACCOUNT
 CASH BANK
 CHECK
 MANUAL CREDIT
 ACCOUNT PAYMENT

Uber Eats UBER

Description	Custom Payment Method
Button Text	UBER
Button Position	1 ▾
Open Cash Drawer	<input type="checkbox"/>
Disable	<input type="checkbox"/>
Currency Field Enabled	<input checked="" type="checkbox"/>
Currency Field Description	TIP
Add Currency Field To Total	<input checked="" type="checkbox"/>
Text Field Enabled	<input checked="" type="checkbox"/>
Text Field Description	ORDER ID
Image Only	<input checked="" type="checkbox"/>
Id	20

Button Text

Enter a description of the payment method to appear on the button...

Payment Button Images

The following SVG images are generated using a single path. Copy the data below and paste it into the image editor. Many of the examples below were generated using the IconPacks browser available at <https://github.com/MahApps/IconPacks.Browser>. Please contact support with your specific requirements.

Settle Screen Settings

Payment Methods | Payment Types Old | Customer Receipt | Currency Shortcuts | Foreign Currency | Cash Payouts | Local Payment < >

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Active Only | All Payment Methods

Add New | Set Button Image | Delete Selected

Payment Methods

- GIFT CARD
- GIFT CERTIFICATE
- ROOM CHARGE
- FOREIGN CURRENCY
- HOUSE ACCOUNT
- CASH BANK
- CHECK
- MANUAL CREDIT
- ACCOUNT PAYMENT

Set Button Image

Uber

Uber Eats

Paste the button icon data into the editor and click save to update.

Cancel | Save

Button Text

Enter a description of the payment method to appear...

M18,12.15V3a1,1,0,0,0-2,0v9.15a4.16,4.16,0,0,0-3,4c0,2.05,1.52,5.8,4,5.8s4-3.75,4-5.8A4.16,4.16,0,0,0,18,12.15ZM17,20c-.8,0-2-2.27-2-3.8A2.11,2.11,0,0,1,17,14a2.11,2.11,0,0,1,2,2.2C19,17.73,17.8,20,17,20ZM10,2A1,1,0,0,0,9,3V8.46L8,9.13V3A1,1,0,0,0,6,3V9.13L5,8.46V3A1,1,0,0,0,3,3V9a1,1,0,0,0,.45.83L6,11.54V21a1,1,0,0,0,2,0V11.54I2.55-1.71A1,1,0,0,0,11,9V3A1,1,0,0,0,10,2ZM0 7.97v4.958c0 1.867 1.302 3.101 3 3.101.826 0 1.562-.316 2.094-.87v.736H6.27V7.97H5.082v4.888c0 1.257-.85 2.106-1.947 2.106-1.11 0-1.946-.827-1.946-2.106V7.971H0zm7.44 0v7.925h1.13v-.725c.521.532 1.257.86 2.06.86a3.006 3.006 0 0 0 3.034-3.01 3.01 3.01 0 0 0-3.033-3.024 2.86 2.86 0 0 0-2.049.861V7.971H7.439zm9.869 2.038c-1.687 0-2.965 1.37-2.965 3 0 1.72 1.334 3.01 3.066 3.01 1.053 0 1.913-.463 2.49-1.233I-.826-.611c-.43.577-.996.847-1.664.847-.973 0-1.753-.7-1.912-1.64h4.697v-.373c0-1.72-1.222-3-2.886-3zm6.295.068c-.634 0-1.098.294-1.381.758v-.713h-1.131v5.774h1.142V12.61c0-.894.544-1.47 1.291-1.47H24v-1.065h-.396zm-6.319.928c.85 0 1.564.588 1.756 1.47H15.52c.203-.882.916-1.47 1.765-1.47zm-6.732.012c1.086 0 1.98.883 1.98 2.004a1.993 1.993 0 0 1-1.98 2.001A1.989 1.989 0 0 1 8.56 13.02a1.99 1.99 0 0 1 1.992-2.004zM0 2.8645v4.9972c0 1.8834 1.3315 3.1297 3.0835 3.1297a2.9652 2.9652 0 0 0 2.1502-.876v.7425H6.445V2.8645H5.223v4.9339c0 1.2642-.8696 2.1198-1.9954 2.122-1.1386-.0023-1.997-.834-1.997-2.122V2.8645zm7.3625 0v.9934h1.163v-.7318a2.9915 2.9915 0 0 0 2.1177.876c1.714.048 3.1295-1.3283 3.1295-3.0429s-1.4155-3.091-3.1295-3.0429a2.9674 2.9674 0 0 0-2.107.876V2.8645zm9.8857 2.0561c-1.6752-.0074-3.0369 1.3492-3.0356 3.0245 0 1.7366 1.3732 3.0373 3.1537 3.0373a3.123 3.123 0 0 0 2.5578-1.2438I-.8495-.6177a2.0498 2.0498 0 0 1-1.7083.8585c-.9763.0126-1.8147-.6915-1.971-1.6553h4.818v-.379c0-1.734-1.254-3.0238-2.9638-3.0245zm6.1632.0667a1.5943 1.5943 0 0 0-1.376.7657v-.7186h-1.163v5.8235h1.1741V7.5465c0-.9023.5581-1.4847 1.3268-1.4847h.4949V4.9886c-.1576.0013-.3186-.0009-.4568-.0013zm-6.2034.944a1.844 1.844 0 0 1 1.8337 1.486H15.424a1.844 1.844 0 0 1 1.784-1.486zm-6.6589.0056c1.1223-.0084 2.0365.8992 2.0364 2.0215-.0026 1.1203-.914 2.0258-2.0343 2.021a2.0151 2.0151 0 0 1-1.4159-.5987A2.0152 2.0152 0 0 1 8.55 7.9592a2.0152 2.0152 0 0 1 .5838-1.422 2.0152 2.0152 0 0 1 1.4153-.6003zM0 12.9864v7.9716h5.7222v-1.3666H1.5458v-

1.971h4.0647v-1.314H1.5458v-1.9556h4.1764v-1.3644zm14.5608.4097v1.6861h-
1.1519v1.338h1.1545v3.143c0 .7927.5712 1.4209 1.6005 1.4209h1.6425L17.8
19.646h-1.1412c-.3482 0-.5714-.1509-.5714-.464v-2.7683H17.8v-1.3316h-1.7062v-
1.686zm-5.2974 1.5275c-1.7348-.0103-3.141 1.4035-3.1214 3.1382.0196 1.7346
1.4575 3.1163 3.1915 3.0668a2.9915 2.9915 0 0 0 1.912-.6655v.532h1.5175v-5.9129h-
1.509v.5257a3.0047 3.0047 0 0 0-1.9205-.6835c-.0244-.0007-.0492-.0006-.0701-
.0008zm11.771.0077c-1.5855 0-2.7002.6437-2.7002 1.8854 0 .8607.6132 1.4213
1.936 1.695l1.4478.3286c.5694.1095.7224.2585.7224.4906 0 .3701-.438.6022-
1.1279.6022-.876 0-1.3774-.1907-1.5723-.8477h-1.533c.219 1.2307 1.1563 2.05
3.0484 2.05h.0022c1.752 0 2.7422-.819 2.7422-1.9534 0-.8059-.5847-1.4084-1.8089-
1.6668l-1.2943-.2605c-.7511-.1358-.988-.2738-.988-.5454 0-.357.3616-.5757 1.0295-
.5757.7227 0 1.2527.1925 1.406.8473h1.5175c-.0854-1.2286-.9899-2.0497-2.8273-
2.0497zM9.467 16.1815c1.0092.0096 1.8188.8369 1.8067 1.8461.0014 1.0046-.8198
1.816-1.8243 1.8025-1.0075-.0048-1.8203-.8256-1.8155-1.833.0048-1.0076.8255-
1.8204 1.833-1.8156z
M11.754 0a3.998 3.998 0 00-2.049.596L3.33 4.532a4.252 4.252 0 00-2.017
3.615v8.03c0 1.473.79 2.838 2.067 3.574l6.486 3.733a3.88 3.88 0 003.835.018l7.043-
3.966a3.817 3.817 0 001.943-3.323V7.752a3.57 3.57 0 00-1.774-
3.084L13.817.541a3.998 3.998 0 00-2.063-.54zm.022 1.674c.413-.006.828.1
1.2.315l7.095 4.127c.584.34.941.96.94 1.635v8.462c0 .774-.414 1.484-1.089 1.864l-
7.042 3.966a2.199 2.199 0 01-2.179-.01l-6.485-3.734a2.447 2.447 0 01-1.228-2.123v-
8.03c0-.893.461-1.72 1.221-2.19l6.376-3.935a2.323 2.323 0 011.19-.347zm-4.7
3.844V18.37h2.69v5.62h4.46v5.62h2.696V5.518h-2.696v4.681h-4.46V5.518Z
M8.428 1.67c-4.65 0-7.184 4.149-7.184 6.998 0 2.294 2.2 3.299 4.25 3.299l-.006-
.006c4.244 0 7.184-3.854 7.184-6.998 0-2.29-2.175-3.293-4.244-3.293zm11.328 0c-
4.65 0-7.184 4.149-7.184 6.998 0 2.294 2.2 3.299 4.25 3.299l-.006-.006C21.061 11.96
24 8.107 24 4.963c0-2.29-2.18-3.293-4.244-3.293zM14.172 14.52l2.435 1.834c-2.17
2.07-6.124 3.525-9.353 3.17A8.913 8.913 0 01.23 14.541H0a9.598 9.598 0 008.828
7.758c3.814.24 7.323-.905 9.947-3.13l-.004.007 1.08 2.988 1.555-7.623-7.234-.02Z
M12.878,5.92841a.297.297,0,0,1,.31378.335c.002.09192.00348.18384.0036.27575.00
061.59241-
.00238,1.18488.00208,1.77723.00329.43353.07947.517.49939.56909a14.83182,14.83
182,0,0,0,3.14795-.04578,4.94837,4.94837,0,0,0,1.57287-
.37384.50722.50722,0,0,0,.34461-.60242,6.83113,6.83113,0,0,0-5.3432-
5.71106,6.60826,6.60826,0,0,0-
3.64844.243A6.718,6.718,0,0,0,7.07709,4.147,6.27211,6.27211,0,0,0,5.23022,8.4316
4,11.18781,11.18781,0,0,0,6.7558,13.9494a1.34216,1.34216,0,0,0,1.32989.74726c.65
332-.01569,1.30732-.00354,1.96106-.00354v-
.00348q1.04187,0,2.08368.00048c.24927.00055.44654.06012.44458.37226-
.00458.72522.00067,1.45044-.00335,2.1756-.00129.22015-.06324.432-.32612.43408-
.26391.00207-.32641-.20893-.32971-.42951-.00512-.34716.00019-.69452.00061-
1.04174.00049-.45105-.07342-.55677-.52319-.639a7.70231,7.70231,0,0,0-2.348-
.0199,2.5959,2.5959,0,0,0-.80054.19476c-.21185.09973-.29608.24506-
.19318.46729.10706.23126.20691.46728.3332.68786a43.875,43.875,0,0,0,3.42651,4.9
5569c.15393.19947.27313.20362.43109.0105.34869-.42639.71491-.83856,1.05994-
1.26788a34.22649,34.22649,0,0,0,3.57635-5.25989,14.17129,14.17129,0,0,0,1.49451-
3.87146A1.20324,1.20324,0,0,0,17.36145,9.824,6.94268,6.94268,0,0,0,15.691,9.6623
5c-.909-.00677-1.81812-.00348-2.72717-.00268-.24481.00024-.42688-.07007-.42707-
.3573-.00048-1.01117-.00183-2.0224.00184-
3.03351C12.53943,6.053,12.64349,5.92041,12.878,5.92841Z
M1111 896c13 -133 -43 -213 -131 -258c146 -35 238 -122 220 -317c-23 -243 -203 -308
-461 -322v-255h-154v251c-39 0 -80 0 -122 1v-252h-154v255c-36 0 -72 1 -109 1h-200l31
183c113 -2 111 0 111 0c43 0 55 31 58 51v402h16c-6 1 -12 1 -16 1v287 c-6 32 -26 68 -

89 68c0 0 2 2 -111 0v164l212 -1c31 0 64 0 97 1v252h154v-247c41 1 82 2 122
 2v245h154v-252c198 -17 355 -78 372 -260zM896 351c0 198 -326 169 -430 169v-
 338c104 0 430 -22 430 169zM825 827c0 181 -272 154 -359 154v-307c87 0 359 -20
 359 153z
 M1064 623l-532 -325l-532 325l532 913zM532 194l532 325l-532 -775l-532 775z
 M1597 633c0 -46 -7 -81 -21 -106c-12 -22 -31 -35 -52 -35c-15 0 -29 3 -41 9v224c26 27
 49 30 57 30c38 0 57 -42 57 -122zM2035 669h-110c4 67 22 98 56 98s52 -32 54 -
 98zM476 534c0 84 -51 119 -134 149c-44 16 -68 29 -68 49c0 17 14 26 38 26c46 0 92 -
 17 124 -33 l18 112c-25 12 -77 32 -149 32c-51 0 -93 -13 -123 -38c-32 -26 -48 -64 -48 -
 109c0 -82 50 -118 132 -147c52 -19 70 -32 70 -53c0 -20 -17 -31 -48 -31c-38 0 -101 19 -
 142 43l-18 -113c35 -20 100 -41 168 -41c54 0 98 13 129 37c34 27 51 66 51 117zM771
 749l19 111h-96 v135l-129 -21l-18 -114l-46 -8l-17 -103h62v-219c0 -57 15 -96 44 -120c25
 -20 61 -30 111 -30c39 0 62 7 79 11v118c-9 -2 -30 -7 -44 -7c-29 0 -42 16 -42
 50v197h77zM1087 724v139c-10 2 -19 3 -28 3c-42 0 -76 -22 -89 -62l-10 56h-131v-
 471h150v306c19 23 46 31 82 31 c8 0 16 0 26 -2zM1124 389h150v471h-150v-
 471zM1746 638c0 80 -15 141 -45 179c-27 35 -64 52 -111 52c-43 0 -81 -18 -117 -56l-8
 47h-132v-645l150 25v151c23 -7 47 -11 68 -11c37 0 92 10 134 56c41 44 61 112 61
 202zM1278 986c0 44 -35 79 -79 79s-79 -35 -79 -79 s35 -80 79 -80s79 36 79
 80zM2176 629c0 75 -16 134 -48 176c-33 42 -82 64 -144 64c-128 0 -207 -94 -207 -
 246c0 -84 21 -148 63 -188c37 -37 91 -55 161 -55c64 0 123 15 160 40l-16 103c-37 -20
 -80 -31 -128 -31c-29 0 -49 6 -63 19c-16 13 -25 35 -28 66h248 c1 7 2 41 2 52zM2304
 1280v-1280c0 -70 -58 -128 -128 -128h-2048c-70 0 -128 58 -128 128v1280c0 70 58 128
 128 128h2048c70 0 128 -58 128 -128z
 M405 864c20 0 40 -10 52 -26c175 -239 297 -495 362 -774h-446c-80 278 -198 532 -
 367 749c-16 21 0 51 26 51h373zM964 507c-33 -135 -75 -266 -125 -393c-53 209 -138
 405 -256 594c26 145 41 294 44 449c141 -227 253 -443 337 -650zM1063 1216 c299 -
 412 521 -920 569 -1472h-451c-33 534 -279 1040 -553 1472h435zM1756 640c0 -278 -
 38 -570 -101 -812c-44 370 -166 738 -359 1083c-17 202 -53 398 -106 584c-5 21 10 41
 31 41h359c28 0 54 -19 61 -46c76 -270 115 -556 115 -850z
 M1510 890c13 -60 10 -129 -4 -204c-65 -330 -284 -444 -565 -444h-44c-34 0 -62 -25 -68
 -59l-4 -19l-55 -346l-2 -15c-7 -34 -35 -59 -69 -59h-251c-28 0 -46 23 -42 51c18 112 35
 224 53 336s36 223 54 335c3 24 19 37 43 37c40 0 80 1 131 0c72 -1 155 3 236 21
 c108 24 206 68 287 144c73 68 122 152 155 246c15 44 27 88 35 133c2 12 5 10 12
 5c55 -41 86 -96 98 -162zM1338 1172c0 -82 -19 -160 -46 -236c-52 -151 -150 -259 -302
 -315c-81 -29 -166 -41 -252 -42c-60 -1 -120 0 -180 0c-65 0 -106 -32 -118 -96 c-14 -76 -
 69 -430 -85 -530c-1 -7 -4 -10 -12 -10h-295c-30 0 -52 26 -48 55l232 1471c6 38 40 67 79
 67h598c43 0 142 -19 209 -45c142 -55 220 -167 220 -319z
 M1760 1408c88 0 160 -72 160 -160v-1216c0 -88 -72 -160 -160 -160h-1600c-88 0 -160
 72 -160 160v1216c0 88 72 160 160 160h1600zM160 1280c-17 0 -32 -15 -32 -32v-
 224h1664v224c0 17 -15 32 -32 32h-1600zM1760 0c17 0 32 15 32 32v608h-1664v-608
 c0 -17 15 -32 32 -32h1600zM256 128v128h256v-128h-256zM640 128v128h384v-128h-
 384z

37.2 Local Payment Methods

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.

Settle Screen Settings

Methods Payment Types Old Customer Receipt Currency Shortcuts Foreign Currency Cash Payouts Local Payment Types < >

Cash Enabled	<input checked="" type="checkbox"/>
Credit Card Enabled	<input checked="" type="checkbox"/>
Gift Card Enabled	<input checked="" type="checkbox"/>
Gift Certificate Enabled	<input checked="" type="checkbox"/>
Foreign Currency Enabled	<input checked="" type="checkbox"/>
Room Charge Enabled	<input checked="" type="checkbox"/>
House Account Enabled	<input checked="" type="checkbox"/>

Cash Enabled
Uncheck box to hide the cash payment type at this pos station

37.3 Currency Shortcuts

The **Currency Presets** tab in Back Office | Settings | Main Settings | Settle 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.

Settle Screen Settings

Payment Methods Payment Types Old Customer Receipt Currency Shortcuts Foreign Currency Cash Payouts Local Pay < >

Currency Preset 1	1
Currency Preset 2	5
Currency Preset 3	10
Currency Preset 4	20
Currency Preset 5	50
Currency Preset 6	100

Currency Preset 1
Value of settle screen currency preset button #1

37.4 Foreign Currency

The Foreign Currency tab in Back Office | Settings | Main Settings | Settle Screen contains settings for foreign currencies that appear on the Settle screen.

Settle Screen Settings							
Payment Methods Payment Types Old Customer Receipt Currency Shortcuts Foreign Currency Cash Payouts Local Payj < >							
ID	COUNTRY	NAME	SYMBOL	ABBREVIATION	EXCHANGE RATE	ENAB	
+ Click here to add a new row							
3	AUSTRALIA	Dollar	\$	AUD	1.00	<input checked="" type="checkbox"/>	
2	CANADA	Dollar	\$	CND	1.00	<input checked="" type="checkbox"/>	
14	CHINA	Yuan	¥	YUN	1.00	<input type="checkbox"/>	
8	EURO ZONE	Eur	€	EUR	1.00	<input type="checkbox"/>	
5	FRANCE	Franc	F	FRF	1.00	<input type="checkbox"/>	
16	ISRAEL	Sheqel	₪	SHK	1.00	<input type="checkbox"/>	
15	JAPAN	Yen	¥	YEN	1.00	<input type="checkbox"/>	
17	KOREA	Won	₩	WON	1.00	<input type="checkbox"/>	
18	QATAR	Rial	ر.ق	RIA	1.00	<input type="checkbox"/>	
19	SAUDI ARABIA	Ri	ر.س	RIA	1.00	<input type="checkbox"/>	

37.5 Cash Discount

A discount can be applied automatically to each cash transaction by setting the cash discount setting to a percentage value larger than zero. For example, enter 2.5 to apply a 2.5% discount to each cash transaction.

Settle Screen Settings X

Payment Types Currency Shortcuts Foreign Currency Cash Payouts Local Payment Types **Cash Discount**

The cash discount is applied to all cash transactions. Enter a percentage value (i.e. 2.5%) or set to zero to disable.

Cash Discount: %

The sum of cash payment discounts are added to the transactions total on the end of day report so that the transactions and sales totals remain balanced.

END OF DAY

REPORTS

CASH DROPS

EMPLOYEE BANKING

SYSTEM

C:\ PROMPT

My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333

.....

END OF DAY REPORT
5/14/2021 9:33:52 AM

.....

TRANSACTIONS SUMMARY

CASH(2)	\$5.68
CASH DISCOUNTS	\$0.14
CREDIT CARD(2)	\$7.12
CREDIT CARD FEES	-\$0.24
	=====
	\$12.70

TAX COLLECTED

SALES SUBTOTAL	\$11.55
TAX	\$1.16
	=====

A message is displayed on the order settlement screen to remind the cashier that discount is deducted automatically for each cash transaction. A message can also be added to the bottom of the [customer receipt](#) ¹⁹¹.

The image displays two screenshots of the AmigoPOS 9 Settle Screen, showing the process of settling a cash transaction.

Top Screenshot: CASH TRANSACTION

The screen shows the order details on the left and the cash transaction interface on the right. A red box highlights the balance due and the cash payment amount.

Order Details:

ORDER NUMBER	3
TYPE	COUNTER
SERVER	DEMO USER
STARTED	5/14/2021 9:28 AM
SUBTOTAL	\$2.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.28
TOTAL	\$3.08
RECEIVED	\$0.00

Cash Transaction Interface:

- BALANCE DUE \$3.08** (highlighted in red)
- \$3.00 CASH (2.5% DISCOUNT)** (highlighted in red)
- CASH TRANSACTION** header
- ENTER THE AMOUNT TENDERED** input field
- CHANGE PAYMENT METHOD** button
- NUMERIC KEYPAD:** \$1, \$5, \$10, \$20, \$50, \$100, 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, EXACT CHANGE, NEXT \$ AMOUNT, and a green play button.

Bottom Screenshot: TRANSACTION COMPLETE

The screen shows the order details on the left and the transaction complete interface on the right. A green box highlights the 'NO BALANCE DUE' status, and a yellow box highlights the change due and the cash discount.

Order Details:

ORDER NUMBER	3
TYPE	COUNTER
SERVER	DEMO USER
STARTED	5/14/2021 9:28 AM
SUBTOTAL	\$2.80
GRATUITY	\$0.00
DISCOUNTS	\$0.00
SURCHARGE	\$0.00
DELIVERY	\$0.00
TAX	\$0.28
TOTAL	\$3.08
RECEIVED	\$3.08

Transaction Complete Interface:

- TRANSACTION COMPLETE** header
- AMOUNT TENDERED \$3.00**
- CHANGE DUE \$0.00** (highlighted in green)
- CHANGE DUE INCLUDES \$0.08 CASH DISCOUNT** (highlighted in yellow)
- Buttons:** ADDITIONAL PAYMENT, PRINT RECEIPT, FINISHED, and LOGOUT.

Special Pricing

38 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 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 'Edit Special Price Definition'. It features a 'Price Method' dropdown set to 'Fixed', a 'Price' input field with '1.50', a 'Start Time' dropdown set to '11:00 PM', and an 'End Time' dropdown set to '01:00 AM'. A 'Save Changes' button is located at the bottom right. A red arrow points to the 'Edit Special Price Definition' button at the top of the form.

The following fields are displayed on the special pricing grid:

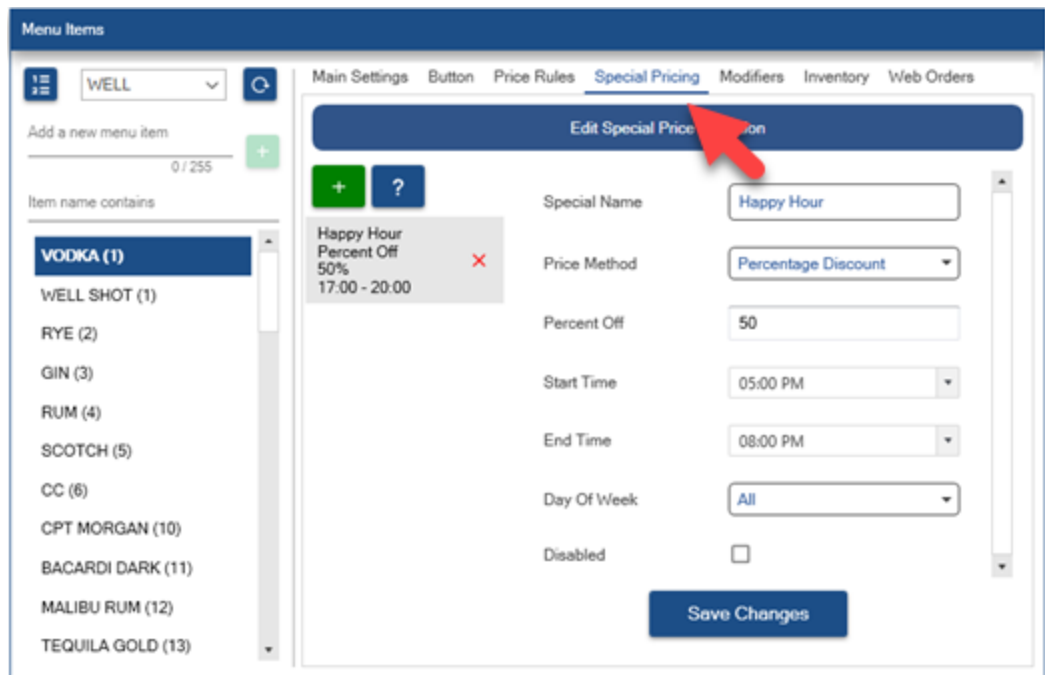
- **Method:** Specify whether the amount is fixed or percentage. A fixed amount indicates that the regular price will be replaced by the special price amount when the special price is in effect. A percentage amount indicates that the percentage will be deducted from the regular price when the special.
- **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.



Bar Menu Item Specials

Open the menu item editor for any bar menu item and select the special pricing tab. In the example below, the strawberry vodka is assigned a special price of 50% off the regular price every day from 5PM-8PM.



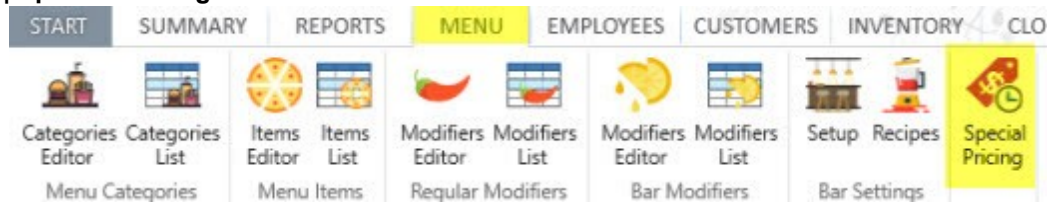
The following fields are displayed on the special pricing grid:

- **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 x [Close]

Regular Menu [Dropdown]

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 x [Close]

Bar Menu [Dropdown]

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	

Special Event Pricing


39 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.

Event Pricing						
	DESCRIPTION	DISABLE	ENABLE METHOD	MENU TYPE	ADDITIONAL AMOUNT	
+ Click here to add a new row						
X	Charity Auction	<input checked="" type="checkbox"/>	Enable Manually	Regular Menu	-\$1.00	Tuesday, Septen
X	House Band	<input checked="" type="checkbox"/>	Enable Manually	Bar Menu	\$1.00	Tuesday, Septen
X	New Years Eve	<input checked="" type="checkbox"/>	Automatic	All Menus	\$5.00	Friday, Decembe

Click on the top row to add a new event price definition.

Event Pricing						
	DESCRIPTION	DISABLE	ENABLE METHOD	MENU TYPE	ADDITIONAL AMOUNT	
	X	<input type="checkbox"/>	Enable Manually	All Menus	\$0.00	Wednesday, Aug
X	Charity Auction	<input checked="" type="checkbox"/>	Enable Manually	Regular Menu	-\$1.00	Tuesday, Septen
X	House Band	<input checked="" type="checkbox"/>	Enable Manually	Bar Menu	\$1.00	Tuesday, Septen
X	New Years Eve	<input checked="" type="checkbox"/>	Automatic	All Menus	\$5.00	Friday, Decembe

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.

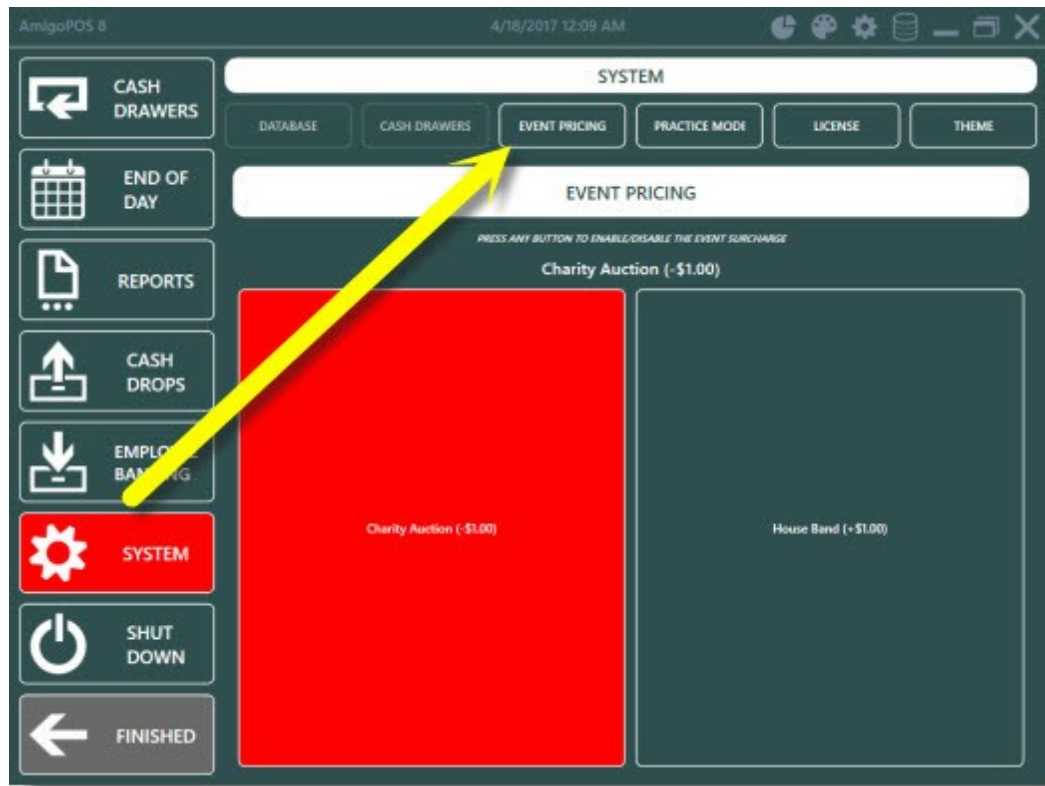
- Show on manager screen: The manager screen can display up to 8 Manual event definitions, as shown below.

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

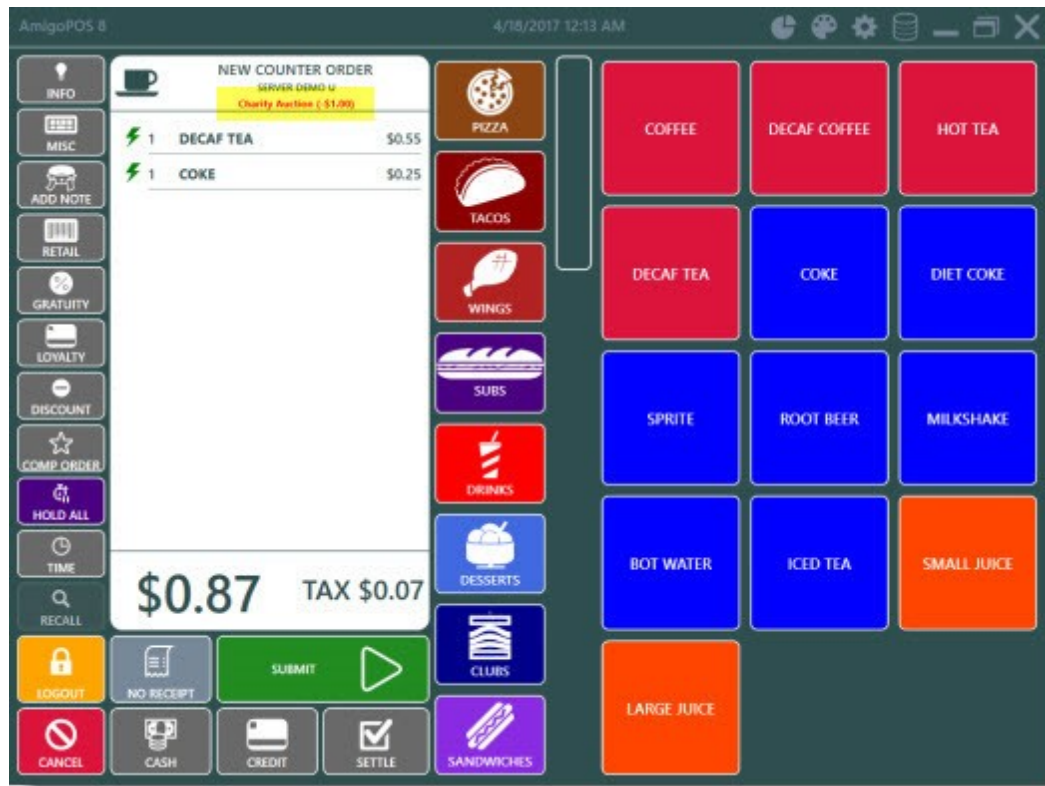
Manager Screen

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.



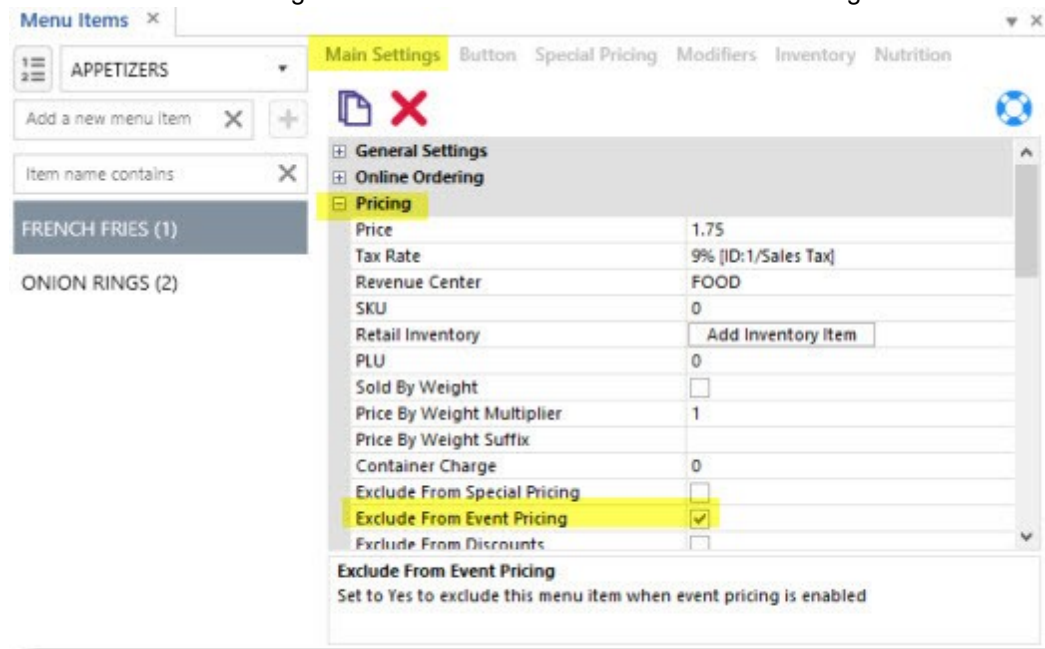
Order Entry Screen

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.



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.

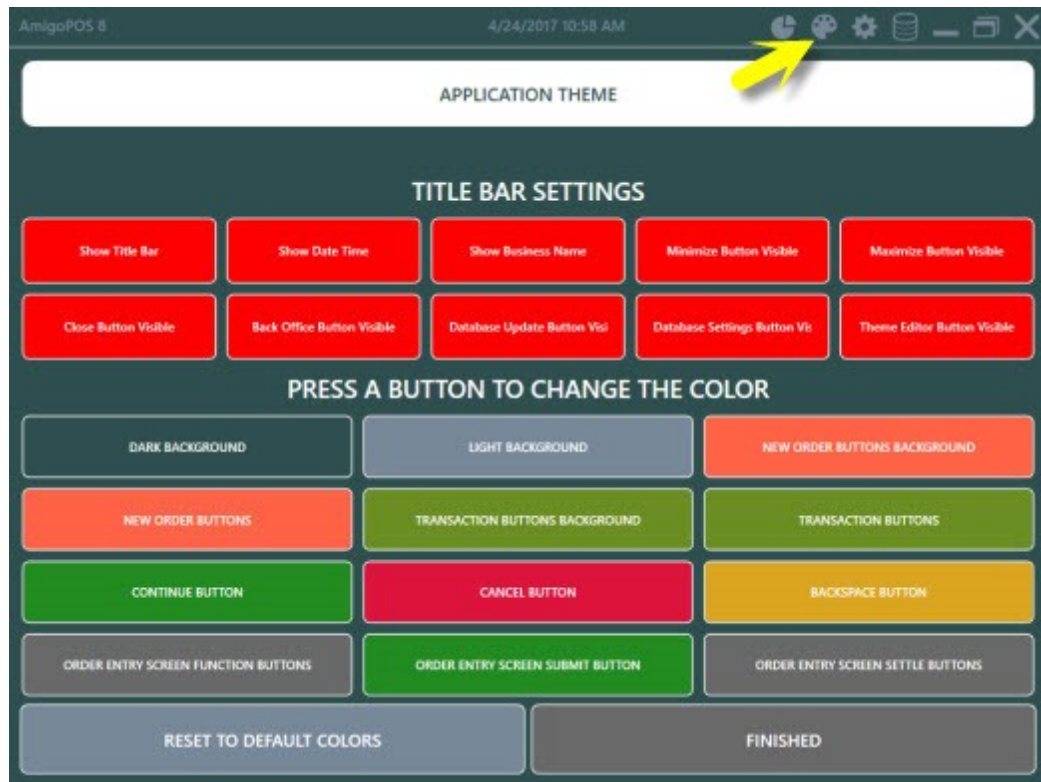


Theme & Colors

40 Theme & Colors

Most [application colors](#)^[847] and [title bar](#)^[847] components can be customized on the manager screen under system/theme and from the theme editor icon in the title bar.



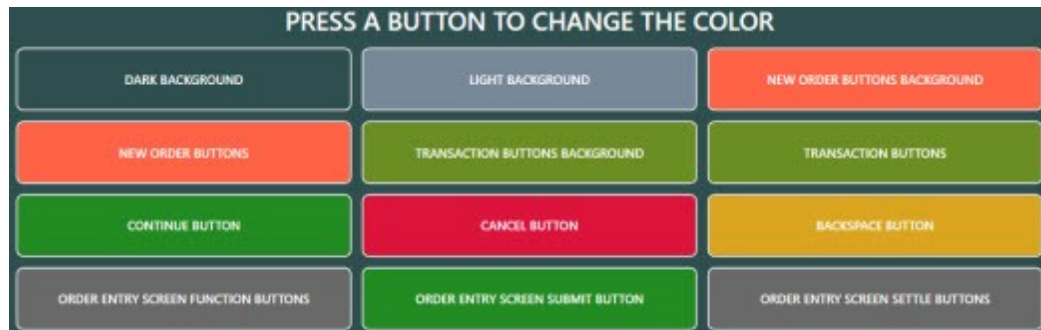


Title Bar Settings



- **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

Troubleshooting

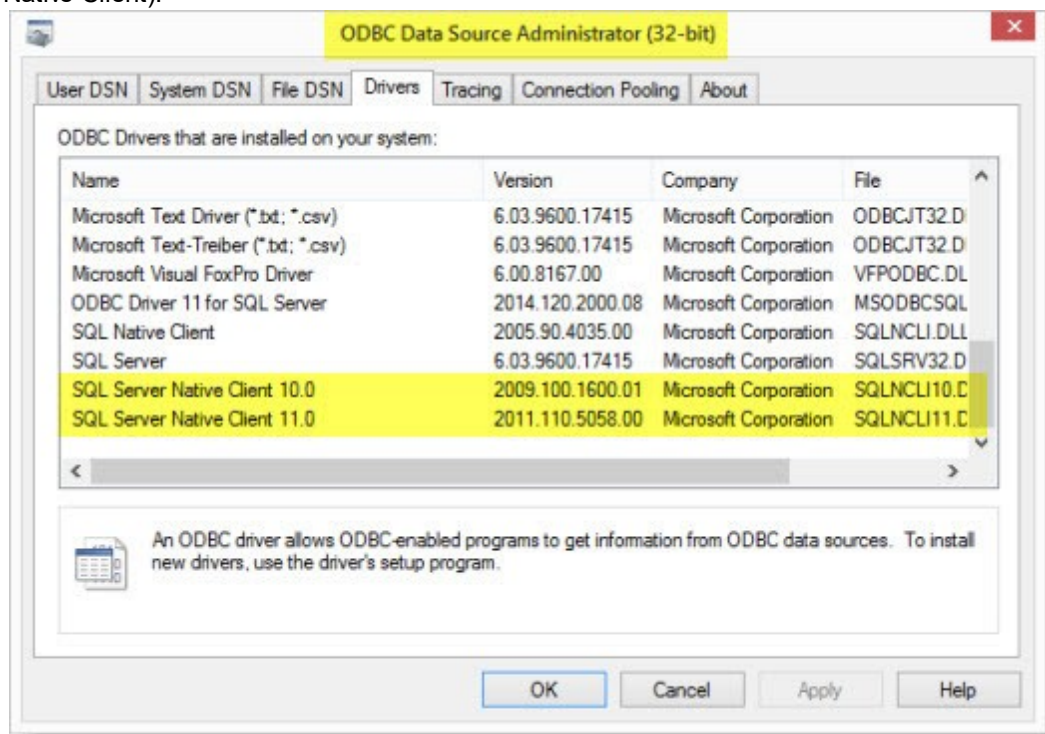
41 Troubleshooting

41.1 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).



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: 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

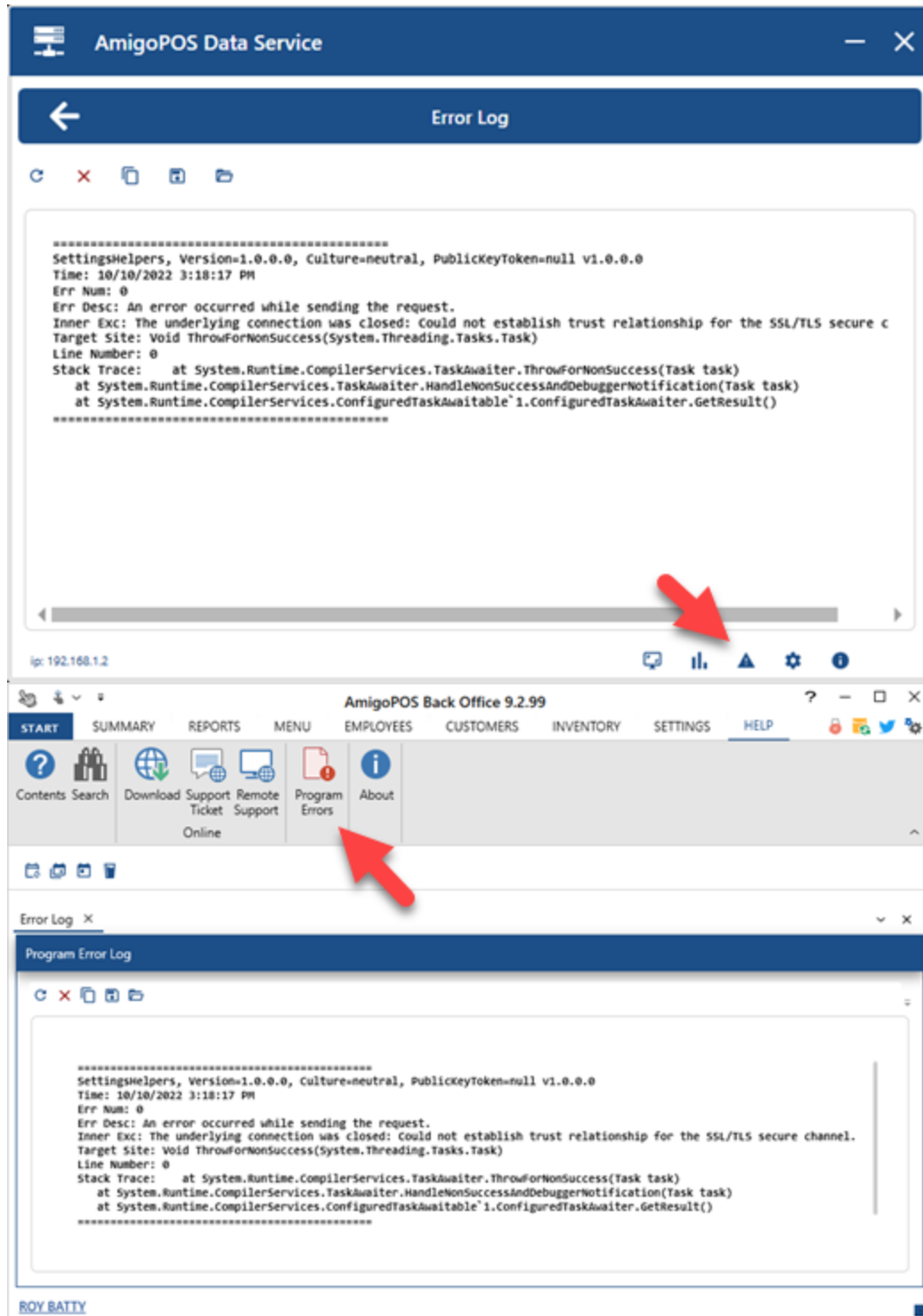
Some drivers may overwrite new OPOS drivers required by AmigoPOS with outdated drivers. This will cause errors when attempting to start AmigoPOS or use any devices, whether through OPOS or traditional interface. Reinstall AmigoPOS, reboot and try again.

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.

41.2 Error Log

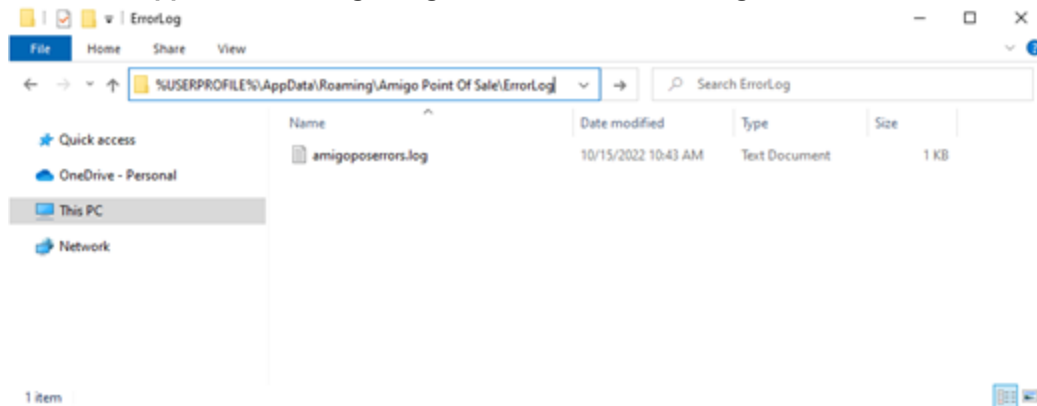
AmigoPOS includes a comprehensive error reporting system that will provide support personnel with the information needed to troubleshoot program errors. Errors may occur during program installation, setup or usage. The error log records the date/time of the error, the program location and error description.



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** or the error icon at the bottom right in the Data Service Application to open the error log screen. Note that the error log contains errors for the local pos station only.
3. If entries exist, click **Save to desktop**. The log is saved to the desktop as **amigoposerrors.log**.
4. Open a support ticket at <https://www.amigopos.com> and use the **Upload** button to attach the log file to the order
5. You may also wish to attach a [compressed backup](#)^[260] 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

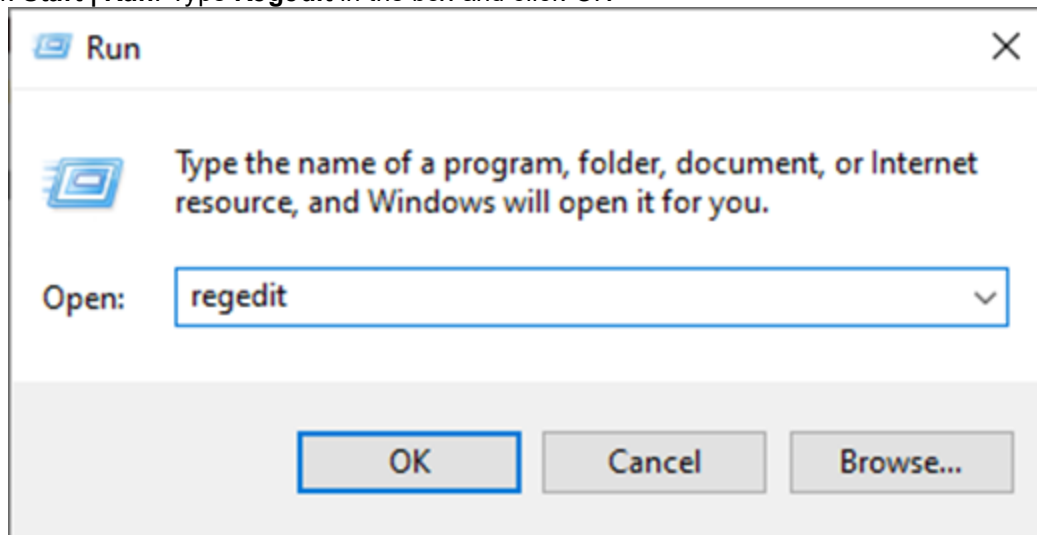
Note that the program error log can be accessed directly in Windows Explorer by pasting %
USERPROFILE%\AppData\Roaming\Amigo Point Of Sale\ErrorLog into the address bar:



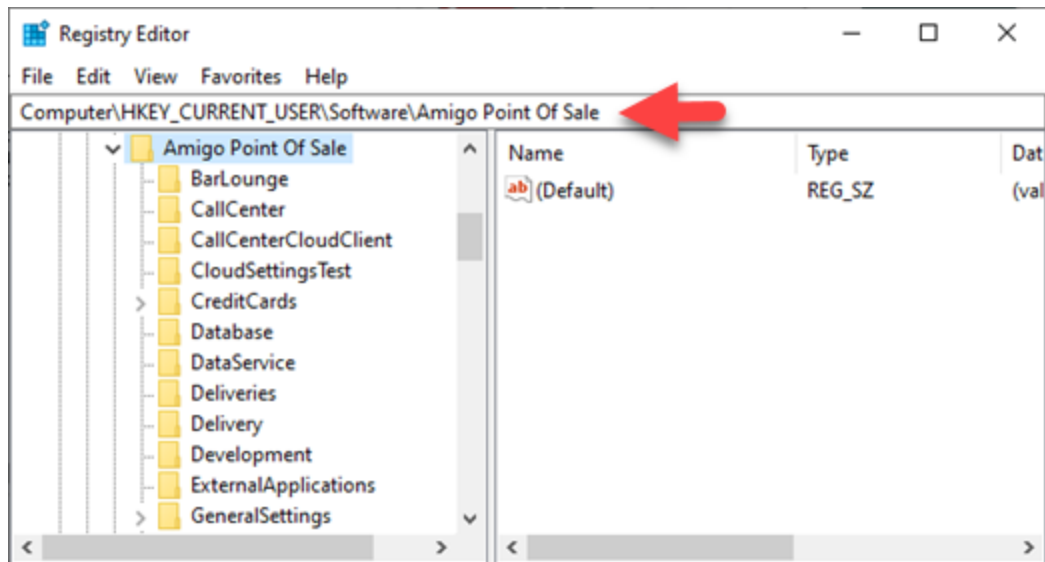
41.3 Registry Backup

When reinstalling AmigoPOS on a new computer, local settings that contain peripheral and other local configuration settings can be backed up as follows:

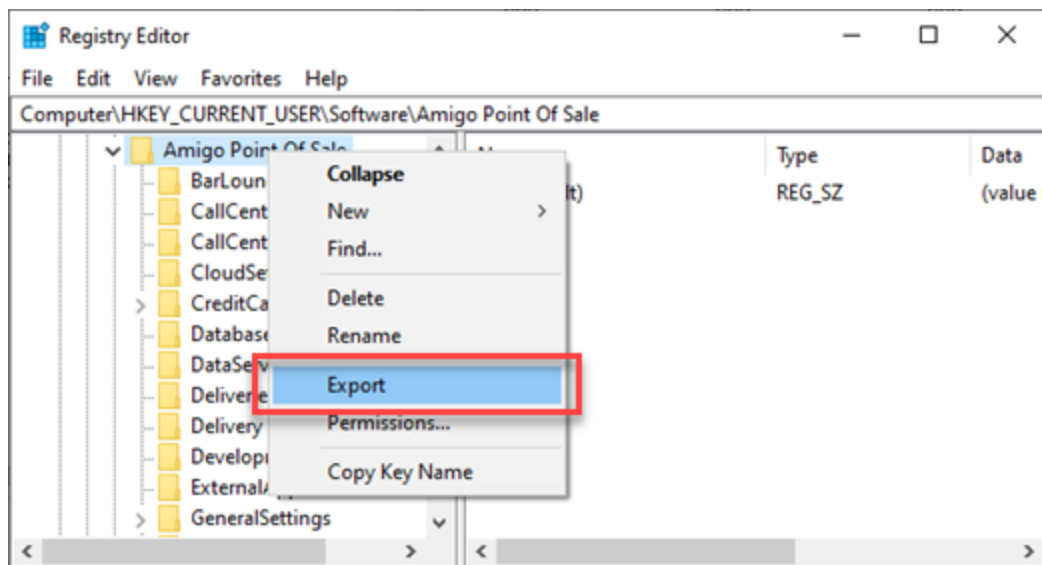
1. Click **Start | Run**. Type **Regedit** in the box and click OK

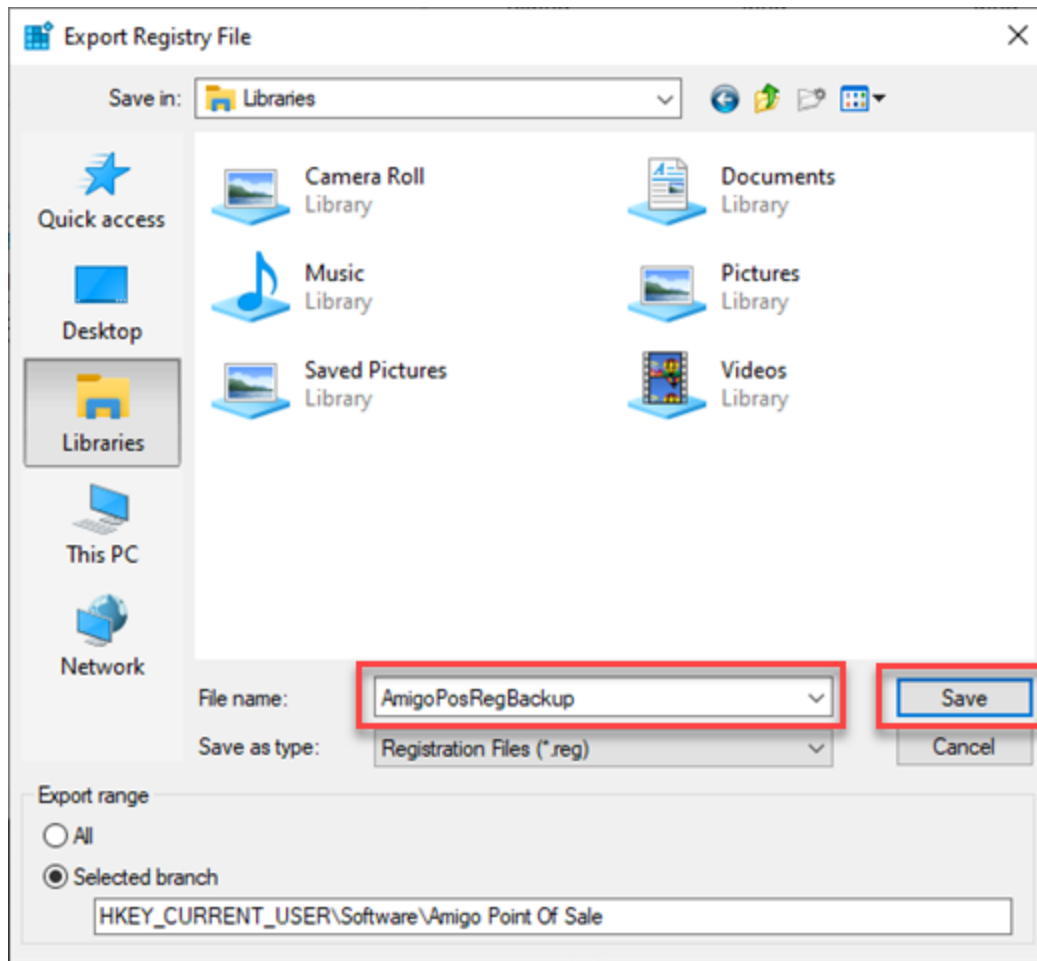


2. In the Registry Editor, navigate to **HKEY_CURRENT_USER\Software\AmigoPOS**.



3. Right-click on the **AmigoPOS** node in the left pane and click **Export**. Enter a file name and click **Save**.





4. Move the file to the new computer. Double-click on the backup file and click **Yes** a the prompt to import the settings from the registry backup file.

Appendix

42 Appendix

42.1 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](#) ^[858]
- [\(2\) Bar Menu Settings](#) ^[859]
- [\(3\) Bar Tabs](#) ^[859]
- [\(4\) Barcode scanner](#) ^[859]
- [\(5\) Card Specifications](#) ^[860]
- [\(6\) Credit Cards](#) ^[860]
- [\(7\) Currency Presets](#) ^[861]
- [\(8\) Custom Text](#) ^[858]
- [\(9\) Database](#) ^[862]
- [\(10\) Deliveries](#) ^[862]
- [\(11\) Discounts](#) ^[862]
- [\(12\) DrawerReset](#) ^[863]
- [\(13\) End Of Day](#) ^[863]
- [\(14\) General Settings](#) ^[864]
- [\(15\) Gift Cards](#) ^[864]
- [\(16\) Images](#) ^[865]
- [\(17\) Ingredient Abbreviations](#) ^[865]
- [\(18\) Label Printer Settings](#) ^[865]
- [\(19\) Label Printers](#) ^[866]
- [\(20\) Loyalty Cards](#) ^[866]
- [\(21\) Order Entry](#) ^[866]
- [\(22\) Order Entry Buttons](#) ^[866]
- [\(23\) Pizza Menu](#) ^[867]
- [\(24\) Pizza Menu Settings](#) ^[867]
- [\(25\) Receipt Printer](#) ^[867]
- [\(26\) Receipt Settings](#) ^[867]
- [\(27\) Regular Menu](#) ^[868]
- [\(28\) Remote Display](#) ^[868]
- [\(29\) Remote Printer Settings](#) ^[870]
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- [\(33\) Reports](#) ^[871]
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- [\(35\) Security](#) ^[872]
- [\(36\) Server Banking](#) ^[873]
- [\(37\) Settle Screen](#) ^[873]
- [\(38\) Store Information](#) ^[873]
- [\(39\) Suggested Gratuities](#) ^[874]
- [\(40\) Time Clock/Schedule](#) ^[874]
- [\(41\) User Interface](#)

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.	^Top
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

[^Top](#)

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

[^Top](#)

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 processing users)
Signature Slip Print Card Member	Set to Yes to print the cardholder name on credit card signature slips (applies only to integrated credit card processing users)

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)
Signature Slip Print order Number	Set to Yes to print the order id on credit card signature slips (applies only to integrated credit card processingusers)
Signature Slip Print Time	Set to Yes to print the transaction time on credit card signature slips (applies only to integrated credit card processingusers)
Signature Slip Print Transaction	Set to Yes to print the transaction id on credit card signature slips (applies only to integrated credit card processingusers)
Signature Slip Print Transaction Type	Set to Yes to print the transaction type on credit card signature slips (applies only to integrated credit card processingusers)
Signature Slip Print Trout D	Set to Yes to print the TroutD on credit card signature slips (applies only to integrated credit card processingusers)
Signature Slip Print User Name	Set to Yes to print the user name on credit card signature slips (applies only to integrated credit card processingusers)

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Currency Presets Numeric Settings

Currency Preset 1	Value of settle screen currency preset button #1
Currency Preset 2	Value of settle screen currency preset button #2
Currency Preset 3	Value of settle screen currency preset button #3
Currency Preset 4	Value of settle screen currency preset button #4
Currency Preset 5	Value of settle screen currency preset button #5
Currency Preset 6	Value of settle screen currency preset button #6

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Yes/No Settings

Currency Preset 1 Enabled	Show currency preset button #1 on the cash transaction screen
Currency Preset 2 Enabled	Show currency preset button #2 on the cash transaction screen
Currency Preset 3 Enabled	Show currency preset button #3 on the cash transaction screen
Currency Preset 4 Enabled	Show currency preset button #4 on the cash transaction screen
Currency Preset 5 Enabled	Show currency preset button #5 on the cash transaction screen
Currency Preset 6 Enabled	Show currency preset button #6 on the cash transaction screen

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Database**Numeric Settings**

Database Update Interval	Interval in hours to synchronize the local database with the server database at user login
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[^Top](#)**Deliveries****Numeric Settings**

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 Order Type	Default order type for delivery orders
Phone Number Format Length	When formatting a phone number, assume this number of digits will be entered
Phone Number Format Length Group 1	Number of digits in the first phone number group
Phone Number Format Length Group 2	Number of digits in the second phone number group
Phone Number Format Length Group 3	Number of digits in the third phone number group

[^Top](#)**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

[^Top](#)**Discounts****Text Settings**

Manual Discount Text	Name to use when user enters a manual discount amount
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[^Top](#) **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)

[^Top](#)**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 perform a manual drawer count when resetting the drawer

[^Top](#)**End Of Day****Numeric Settings****Default Weather Image**

Default weather image that appears on end of day screen

[^Top](#) **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

End Of Day Cash Paid Out Summary

Set to Yes to show cash paid out summary on the end of day report

End Of Day Deliveries Summary

Set to Yes to show deliveries by driver summary on the end of day report

End Of Day Order Type Summary

Set to Yes to show sales by order type summary on the end of day report

End Of Day Refunds Summary

Set to Yes to show refunds summary on the end of day report

End Of Day Removed Items Summary

Set to Yes to show deleted order items summary on the end of day report

End Of Day Server Sales Summary

Set to Yes to show sales by server summary on the end of day report

End Of Day Subtotal By Item Type Summary

Set to Yes to show subtotal (tax not included) by item type summary on the end of day report

End Of Day Tax Collected

Set to Yes to show tax summary on the end of day report

End Of Day pos station Sales Summary

Set to Yes to show sales by pos station summary on the end of day report

End Of Day Transactions Summary

Set to Yes to show revenue by transaction type summary on the end of day report

End Of Day Void Open orders

Set to Yes to automatically void all open orders and associated transactions when performing end of day

Exclude Bartenders From Bar Sales Report

Set to Yes to exclude bartenders from the end of day bar sales report. Generally used for tip-out.

Include Tax In Bar Sales Report	Set to Yes to include tax in bar sales report totals (applies to non-VAT users only)
Show End Of Day Confirmation Screen	Set to Yes to show the confirmation screen after the user presses the Confirm End Of Day button
Show End Of Day Event Weather	Prompt the manager to enter business day characteristics when performing end-of-day
Suppress Print End Of Day Report	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

Last Location Setting Update	Version check for last location settings update (do not alter this value)
Screen Font Name	System font to use on front end user interface

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Numeric Settings

Bartender Permission	Job Type Id corresponding to bartender job type
Database Version	Current database version. Do not modify this value.
Default Misc Item Tax Rate	Enter the default tax rate to use for MISC items. This value can be changed on the MISC item entry screen.
Driver Job Type	Job Type Id corresponding to driver job type
Driver Permission	Job Type Id corresponding to driver job type
Split Void Reason	Void reason id to use when voiding an order if splitting by guest

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Yes/No Settings

Compress Backup Files	Set to Yes to automatically compress the backup file and then delete it
Prevent Overlapping Schedule Entries	Set to Yes to disable the ability to add conflicting schedule entries for individual employees (also applies to cloning schedule)
Show Loyalty Card Prompt	Set to Yes to prompt the user to swipe the customer's loyalty card before settling an order
Show Message Alert	Set to Yes to show animated icon when user has unread messages
Temp Files All Users	Set to Yes to use the All Users documents folder for temporary files; set to No to use the Current User documents folder
order List Scrolling	Set to No to scroll one order per button press or True to scroll to the top or bottom of the list
Use Default Printer On Printer Error	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

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Yes/No Settings

Label Print Customer Info Bottom	Print customer information at bottom of label
Label Print Customer Info Top	Print customer information at top of label

Label Print Date Time Bottom	Print date and time at bottom of label
Label Print Date Time Top	Print date and time at top of label
Label Printer Name Top	Print the name of the printer at top of label. Useful when testing multiple label printers
Label Print Item Count	Print item count at bottom of label
Label Print Modifiers	Print menu item optionals on labels
Label Print Order Total Due	Print order total at bottom of label
Label Print Order Type Bottom	Print order type and order number at bottom of label
Label Print Order Type Top	Print order type and order number at top of label

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Label Printers

Loyalty Cards

Numeric Settings

Loyalty Card Coupon Amount	When using amount based loyalty card rewards, enter the amount of the coupon issued when the purchase amount level is reached
Loyalty Card Coupon Expiration	When using amount based loyalty card rewards, enter the value in days that the coupon is valid from the date of issue
Loyalty Card Method	The value indicating the type of loyalty card promotion used. 0=disabled, 1=amount based 2=points based
Loyalty Card Purchase Amount	When using amount based loyalty card rewards, enter the amount that must be purchased before a coupon is issued

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Order Entry

Text Settings

Take Out Container Charge	order Line Item Description for Takeout Container Charge
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Yes/No Settings

Keep Original User After order Recall	Set to No to replace the user id on a recalled order with the new user (when a different user opens the order)
Show Category Select Button	Set to Yes to show the category selection button (All-Food-Bar) on the order entry screen
Use Table In Use Indicator	Set to Yes to show seating chart table buttons with a red background when the table is in use
Use Table Reserved Indicator	Set to Yes to show seating chart table buttons with a yellow background when the table is in reserved

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Order Entry Buttons

Yes/No Settings

Order Entry Screen Submit Button	Set to No to hide the submit button on the order entry screen
Order Entry Screen Suspend Button	Set to No to hide the suspend button on the order entry screen
Remain On Previous Category Selection	Set to Yes to remain on the previously selected regular menu category instead of using the predefined startup category when starting a new order
Retail Module Enabled	Set to No to hide the retail button on the order entry screen

Use Exact Change For Cash Button	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

Pizza Menu Allow Tax Included	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

Pizza Half Style Multiplier	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
Pizza Ingredient Half	Amount to multiply price for half pizza ingredient order
Pizza Ingredient Qtr	Amount to multiply price for quarter pizza ingredient order
Pizza Menu Suggested Price Markup	Amount by which to multiply the recipe cost to arrive at the suggested selling price for pizza menu items
Pizza Menu Tax Rate	Default tax rate for all pizza menu items

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Yes/No Settings

Pizza Half Charge Higher Price	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
Pizza Menu Enabled	Enable the pizza menu on the order entry screen
Pizza Styles Allow Half	Allow half style selection when selecting a pizza style

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Receipt Printer Numeric Settings

Print Item Tax Type	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

Print Tax Lines	Print tax lines on customer receipt
Print order Line Above Bottom Text	Print a line above the bottom 5 order text lines. Set to 0 for no line 1 for single line 2 for double line
Print order Line Above Total	Print a line above the order total. Set to 0 for no line 1 for single line 2 for double line
Print order Line Below Bottom Text	Print a line under the bottom 5 order text lines. Set to 0 for no line 1 for single line 2 for double line
Print order Line Below Header	Print a line under the header. Set to 0 for no line 1 for single line 2 for double line
Print order Line Below Logo	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
Print order Line Below Top Text	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
^Top <small>858</small>	
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
Remote Display Late Sound	System sound to play when the oldest order duration is longer than the late alert minutes
Remote Display Late Text Color	Remote display footer late font color
Remote Display Lines Double	Number of lines to show on screen order in double view
Remote Display Lines Normal	Number of lines to show on screen order in normal view
Remote Display Lines Triple	Number of lines to show on screen order in full screen height view
Remote Display Menu Item Color	Remote display menu item text color
Remote Display Normal Alert Color	Normal footer color for remote display main screen
Remote Display Normal Text Color	Remote display footer normal font color
Remote Display Optional Color	Remote display optional text color
Remote Display Order Type Text Color	Remote display order type font color
Remote Display Screen Color	Background color for remote display main screen
Remote Display Screen Refresh Disable Interval	Time in seconds to disable screen updates when the Previous, Next or Lock button is pressed
Remote Display Screen Refresh Interval	Time in seconds to pause between screen updates
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.
Remote Display Summary Color	Background color of summary view
Remote Display Summary Text Color	order color of summary view
Remote Display Text Color	Text color for remote display main screen
Remote Display Text Size	Remote display font size
Remote Display order Color	order and list background color for remote display main screen
Remote Display Totals Position	Position of the item totals list

Remote Display Warning Alert Minutes	Minutes before warning alert color is used (set to 0 to disable)
Remote Display Warning Color	Warning alert color for remote display main screen
Remote Display Warning Late Sound Interval	Number of minutes between playing sound when the oldest order duration is longer than the warning or late alert minutes
Remote Display Warning Sound	System sound to play when the oldest order duration is longer than the warning alert minutes
Remote Display Warning Text Color	Remote display footer warning font color

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Yes/No Settings

Remote Display Enabled	Set to Yes to enabled remote display(s)
Remote Display Show Totals	Set to Yes to enable the item totals list
Remote Display Show Totals Double Wide	Set to Yes to display the item totals list double with width or height
Remote Display Text Bold	Set to Yes to use bold font on remote displays

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Remote Printer Settings Numeric Settings

Remote Printer Line Feeds Bottom	Number of blank lines to print at the bottom of prep tickets
Remote Printer Line Feeds Top	Number of blank lines to print at the top of prep tickets

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Yes/No Settings

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.
Remote Print Customer Info	Print customer name, address and phone on prep tickets
Remote Printer Date Time	Set to Yes to print the date and time on the prep ticket header
Remote Printer Header Height	Print prep ticket header text in double-height font
Remote Printer Header Width	Print prep ticket header text in double-wide font
Remote Printer Menu Item Line Feed	Set to Yes to insert a blank line after each menu item and optional is printed
Remote Printer Order Type	Set to Yes to print the order type on the prep ticket header
Remote Printer Printer Name	Set to Yes to print the printer name on the prep ticket header
Remote Printer Server Name	Set to Yes to print the server name on the prep ticket header
Remote Printer Table Name	Set to Yes to print the table name on the prep ticket header
Remote Printer order	Set to Yes to print the order id on the prep ticket header
Remote Print Guest	Set to Yes to print guest number above menu items for order types that have guest assignment enabled

Remote Print Ticket Number	Print large 3-digit number at bottom of prep tickets
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Remote Printers Yes/No Settings

Print Discounts On Remote orders	Set to Yes to print any discounts at the bottom of remote orders
Print Prices On Remote orders	Set to Yes to print prices next to each item on remote orders. Enabling this feature shortens the item name.
Send Remote Removed Item Alert	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

Remote Printer Menu Items Height	Print prep ticket menu items in double-height font
Remote Printer Menu Items Red	Print prep ticket menu items in red
Remote Printer Menu Items Width	Print prep ticket menu items in double-wide font
Remote Printer Show Price	Show item price on remote orders
Remote Print Optional Level Asterisk	Set to Yes to print an asterisk before and after the optional level description when sent to prep printer
Use Delivery Zones	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

Remote Printer Modifiers Height	Print prep ticket modifiers in double-height font
Remote Printer Optionals Red	Print prep ticket Optionals in red
Remote Printer Optionals Width	Print prep ticket Optionals in double-wide font

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Reports Numeric Settings

Report Logo Image	Image to display at top of full size reports (use 0 for no image)
Report Transactions Large Amount	Large amount transactions threshold for Transactions (Large Amount) report

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Retail Module Text Settings

Bottle Deposit Text	Text to display on reports and print on customer receipt for retail item bottle deposits
Default Misc Item Name	Text to use if the use default misc item setting is set to true
Retail Shortcuts Heading 1	Text to display at top of retail shortcuts group 1
Retail Shortcuts Heading 2	Text to display at top of retail shortcuts group 2

Retail Shortcuts Heading 3	Text to display at top of retail shortcuts group 3
Weight Scale Unit	Text to print on order for scale unit of measurement
Numeric Settings	
Cumulative Rental Limit Amount	Reserved for future use - Maximum value of items that a customer can rent
Cumulative Rental Limit Items	Reserved for future use - Maximum number of items that a customer can rent
Inventory Suggested Price Markup	Amount by which to multiply the recipe cost to arrive at the suggested price
Retail Items Category	Default category id for retail items
Retail Items List Length Limit	Maximum number of items to show on retail items lookup list on order entry screen (use small number for slower systems)
Yes/No Settings	
Group Retail Items On Single order Line	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.
Retail Menu Allow Tax Included	Set to No to charge tax on retail menu items for order types that are configured to be tax inclusive
Show Retail PLU Button	Set to Yes to enable the retail item PLU button on the order entry screen
Show Retail Price Change Button	Set to Yes to enable the retail item price change button on the order entry screen
Show Retail Search Button	Set to Yes to enable the retail item search button on the order entry screen
Show Retail Shortcuts	Set to Yes to enable the retail shortcuts buttons on the order entry screen
Show Retail SKU Button	Set to Yes to enable the retail item SKU button on the order entry screen
Use Default Misc Item Name	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	
Clear User Actions Log Interval	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.
Order Screen Delay	Delay (in seconds) after settling order before returning to the start screen due to inactivity
Server Job Type	Job Type Id corresponding to server job type
Server Permission	Permission corresponding to server job type
Settle Screen Delay	Delay (in seconds) after settling order before returning to the start screen due to inactivity. Enter a value between 5 and 300 seconds
Start Screen Delay	Delay (in seconds) after logging in before auto-logout due to inactivity. Enter a value between 5 and 300 seconds
Yes/No Settings	

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Allow Permission Overrides	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	^Top ⁸⁵⁸
Time Settings		
Business Day Start	Business open time (Enter 00:00 for 24 hours)	^Top
Suggested Gratuities		
Text Settings		
order Text Suggested Gratuities	Text to print on order for suggested gratuities header	^Top ⁸⁵⁸
Numeric Settings		
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	^Top ⁸⁵⁸
Yes/No Settings		
Print Suggested Gratuities	Enable suggested gtratuities 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	^Top
Time Clock/Schedule		
Numeric Settings		
Late Clock In Grace Period	Time difference in minutes (between current time and scheduled time) before an employee is considered late	^Top ⁸⁵⁸
Yes/No Settings		
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	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 Hide time clock activity on drawer change report

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User Interface

Numeric Settings

Bar Menu Item Image Category Image category for bar menu item images

Button Appearance Theme to use on most user interface buttons
0=3D;1=Flat;2=Transparent;3=WinXP4=MS Explorer;5=MS Office

Button Border Color Color to use on regular and bar menu buttons

Button Color Highlight Select the alternate color to use on POS buttons

Button Color Normal Select the color to use on most POS buttons

Caller Popup Exit Delay Delay in seconds before caller id popup window closes

Delivery Alert Popup Exit Delay Delay in seconds before caller id popup window closes

Login Screen Logo Image Image that appears on the left side of the login screen

Login Screen Logo Mask Color Transparency color of login screen image

Menu Group Image Category Image category for regular menu category images

Menu Item Image Category Image category for menu item images

Normal Text Size Enter the font size (pts) to use on most buttons. This value can be adjusted for individual buttons if required.

Optional Image Category Image category for Optional item images

Pizza Menu Item Image Category Image category for pizza menu item images

Recipe Image Category Image category for recipe images (used for internet ordering and remote kitchen display)

Room Layout Image Category Image category for seating chart background images

Screen Color Highlight Select the color to use on screen accents and some borders

Screen Color Normal Select the color to use on most POS screens

Screen order Image Image Id of the screen order watermark

Screen order Image Transparency Transparency percentage of the screen order logo

Seating Chart Image Category Image category for seating chart images

Weather Image Category Image category for weather images that appear on end of day screen

[^Top](#) ⁸⁵⁸

Yes/No Settings

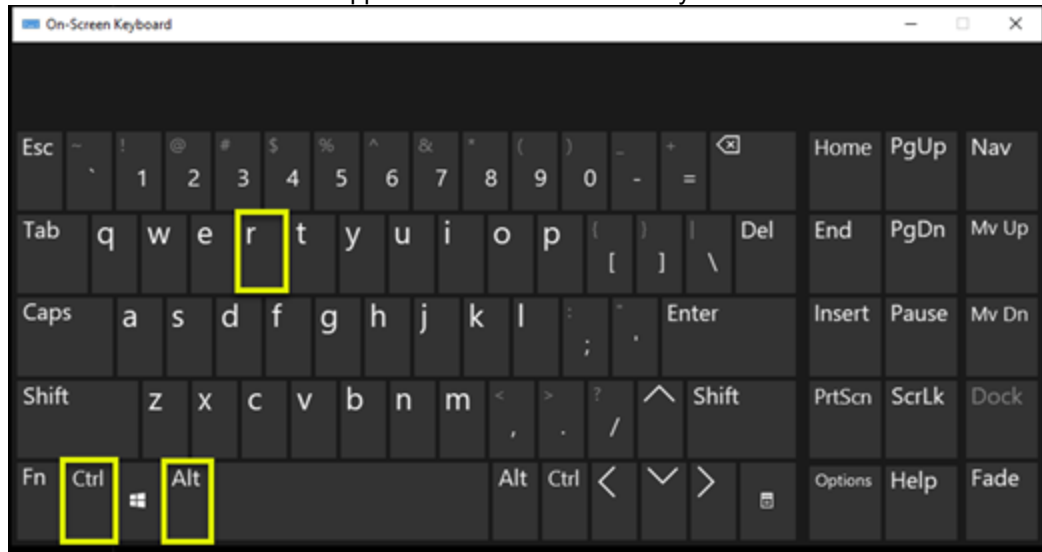
Show Tooltips Back Office If set to Yes, buttons will show tooltips

Show Tooltips Front End If set to Yes, buttons will show tooltips

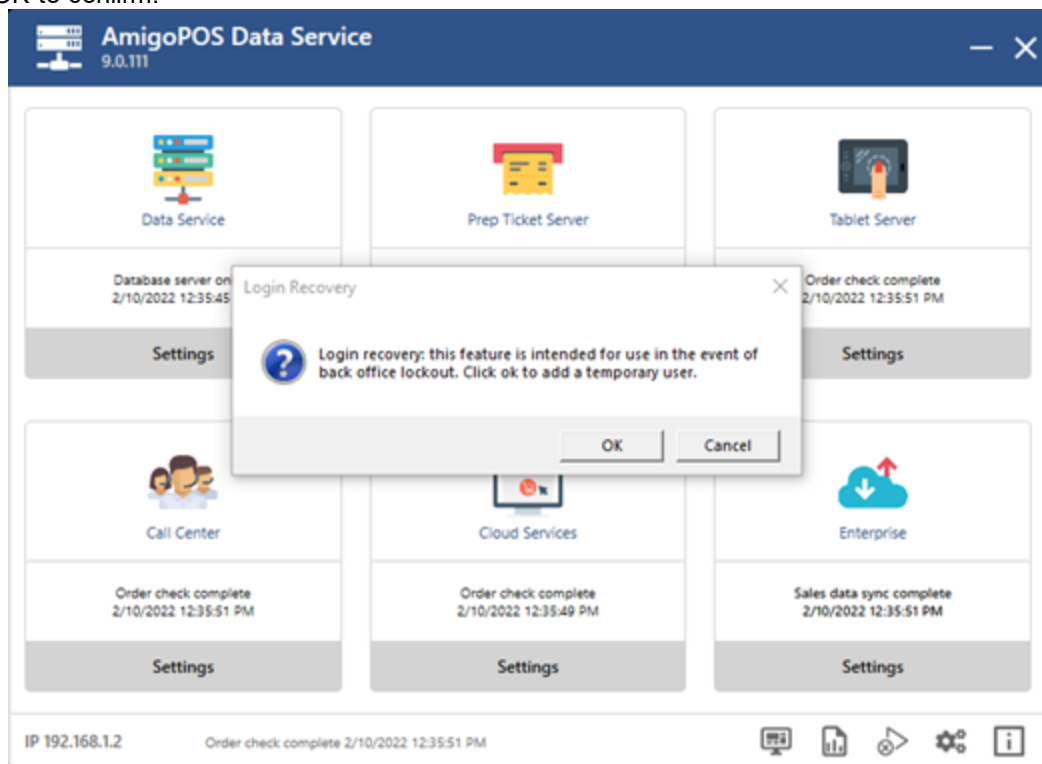
42.2 Login Recovery

If all users with back office permissions have been mistakenly deleted or disabled, complete the following procedure to create a temporary employee with back office permissions. This new employee should be deleted after the existing employee's permissions have been restored.

Open or maximize the data service application and simultaneously click CTL+ALT+R.



Click OK to confirm.



Login to back office with the numeric login displayed in the prompt.

